Well Visit Template Editor

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Version 20.13

> *This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

About Well Visit Template Editor

Path: Clinical tab > Well Visit Templates

All of the Office Practicum Well Visit Templates were created by our Medical Director, Susan Kressly, M.D., F.A.A.P.
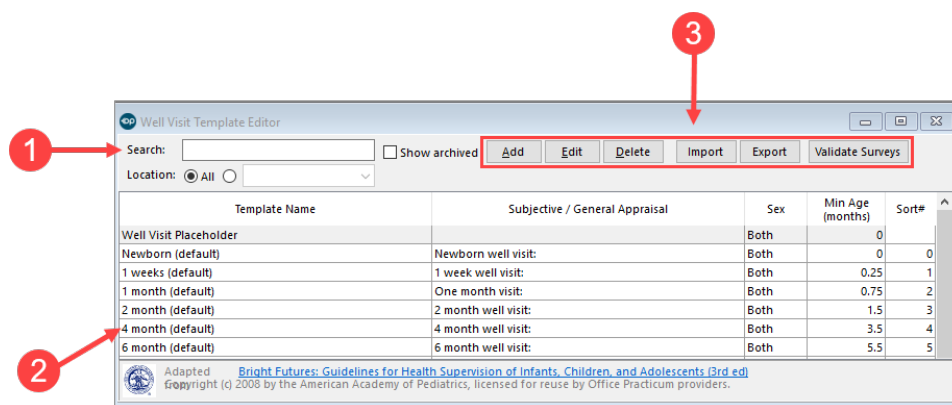
These templates are based on the Bright Futures Guidelines and contain Bright Futures Anticipatory Guidance, Developmental Milestones, Pre-Visit Surveys, Developmental Surveys, Patient/Parent Educational Handouts, and other items following Bright Futures recommendations.

> **Note**: While these templates provide you with a great starting place, we strongly suggest each practice review the information included in each template, as well as orders, prior to beginning patient documentation.

In the Well Visit Template Editor you can create, remove, edit, import, and export Well Visit Templates. Additionally, you can look for invalid CHADIS surveys linked to templates. More information on validating CHADIS surveys can be found **here**. The Template Editor contains two windows:
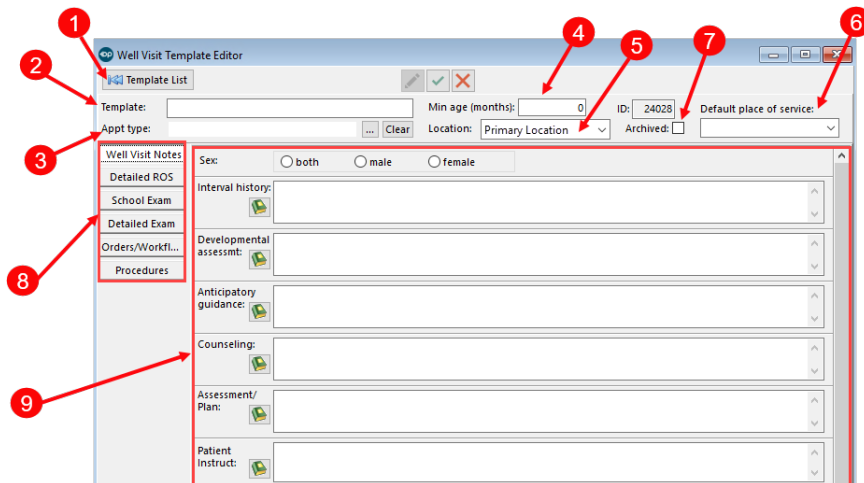
- The Well Visit Template Editor Template List
- The Well Visit Template Editor

Well Visit Template Editor Template List Map

Number	Section	Description
1	Search	The search criteria gives you the ability to search for specific templates.

| 2 | Template List | The template list displays all Well Visit templates or templates based on the search criteria. |
| 3 | Function buttons | The function buttons allow you to add, remove, edit a template. Additionally, you can import/export templates, and validate CHADIS surveys used in templates. |

Well Visit Template Editor Map

Number	Section	Description
1	Template List	The Template List button returns the Well Visit Template Editor to the Template List.
2	Template	The Template field assigns a name to the template.
3	Appointment Type	The Appointment Type selects a default appointment type when scheduling. This is not a requirement to save the template.
4	Min Age (Months)	The Minimum Age (months) field indicates the minimum age a child must be to receive a prompt for use. This will only occur if the template was not chosen at the time of making an appointment.
5	Location	The Location field assigns the templates by location. If access is needed in multiple locations leave this field blank.
6	Default place of service	The Default place of service assigns the selected place of service to the Place of Service field in the Visit Info section of a Well Visit. This is not required.
7	Archived	The Archived checkbox is selected when the template is no longer used.
8	Tabs	- The **Well Visit Notes** tab creates Well Visit Note field entries. This includes gender, interval history, developmental assessment, anticipatory guidance, counseling, assessment/plan, patient instructions, and diagnosis. - The **Details ROS** tab contains the ROS Questions/Symptoms for the Well Visit. - The **School Exam** tab provides the school exam and developmental entries for the well visit template. - The **Detailed Exam** tab provides entries for a detailed well visit exam. - The **Orders/Workflow** tab sets up orders and workflow tasks as they relate to the practice. - The **Procedures** tab adds procedure codes to a template in order to

		capture charges performed by an office procedure.
9	Template Entries	The Template Entries displays the fields specific to the selected Well Visit Template tab.

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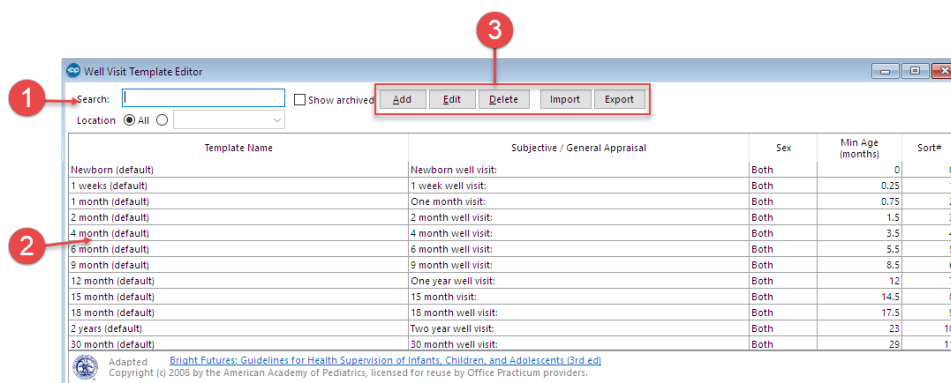
📌 **Note**: While these templates provide you with a great starting place, we strongly suggest each practice review the information included in each template, as well as orders and workflow, prior to beginning any real patient documentation.

The Well Visit Template Editor can create, remove, edit, import, and export Well Visit Templates. The Template Editor contains two windows:
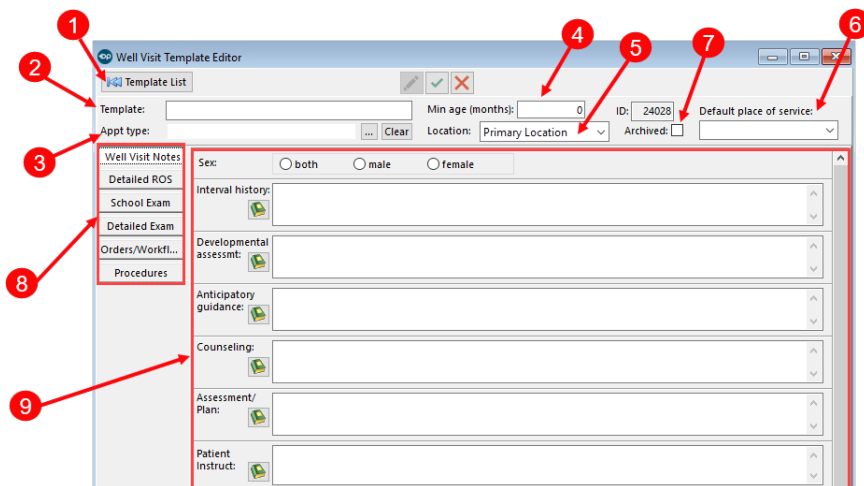
- The Well Visit Template Editor Template List
- The Well Visit Template Editor

Well Visit Template Editor Template List Map

Number	Section	Description
1	Search criteria	The search criteria locates specific templates.
2	Template List	The Template List displays the Well Visit Templates based upon the search criteria. Select a Template in the list to open the Well Visit Template Editor.
3	Function buttons	The function buttons add a template, remove a template, edit a template, and import and export templates.

Well Visit Template Editor Map

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5	Location	The Location field assigns the templates by location. If access is needed in multiple locations leave blank.
6	Default place of service	The Default place of service assigns the selected place of service to the Place of Service field in the Visit Info section of a Well Visit. This is not required.
7	Archived	The Archived checkbox is selected when the template is no longer used.
8	Tabs	• The **Well Visit Notes** tab creates Well Visit Note field entries. This includes gender, interval history, developmental assessment, anticipatory guidance, counseling, assessment/planning, patient instructions and diagnosis. • The **Details ROS** tab contains the ROS Questions/Symptoms for the Well Visit. • The **School Exam** tab provides the school exam and developmental entries for the well visit template. • The **Detailed Exam** tab provides entries for a detailed well visit exam. • The **Orders/Workflow** tab sets up orders and workflow tasks as they relate to the practice. • The **Procedures** tab adds procedure codes to a template design in order to capture charges performed by an office procedure.
9	Template Entries	The Template Entries field displays the fields for the selected Well Visit Template tab.