Add To or Edit a Code Table

Last Modified on 03/11/2021 4:44 pm EST

Version 14.19

Path: Practice Management tab > Coded Values

Overview

Each item on the list in the **Code Table Purpose** section displays a corresponding set of elements in the lower section of the page. Any item listed in the Code Table Purpose section with the box checked to **Allow Edits** can be customized using the Add, Delete, or Edit buttons located in the center of the window.
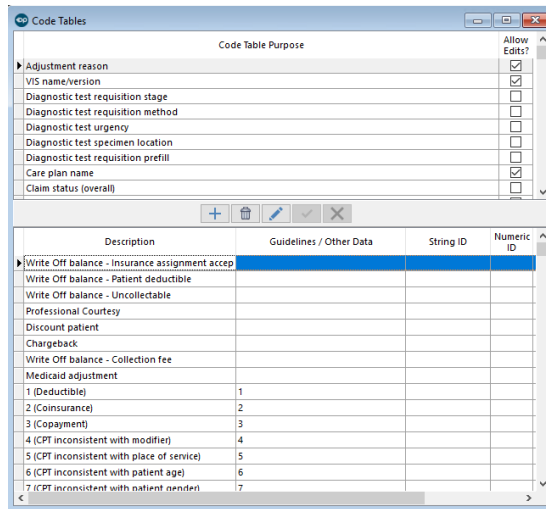
Commonly Edited Code Tables

Code Table Purpose	Correlating Screen or Field in OP
Adjustment Reason	Patient Chart: Payments
Allergy Stage/Severity	Patient Chart: Allergies/Rxns
Allergy Symptoms	Patient Chart: Allergies/Rxns
Allowed Contact Modes: Billing	Patient Chart: Basic Information Patient Chart: Family Contacts
Allowed Contact Modes: General	Patient Chart: Basic Information Patient Chart: Family Contacts
Allowed Contact Modes: Medical	Patient Chart: Basic Information Patient Chart: Family Contacts
Allowed Contact Modes: Messages	Patient Chart: Basic Information Patient Chart: Family Contacts
Allowed Contact Modes: Portal	Patient Chart: Basic Information Patient Chart: Family Contacts
Allowed Contact Modes: Recall	Patient Chart: Basic Information Patient Chart: Family Contacts
Appointment Frequency	Patient Chart: Follow Up Tab

	Patient Chart: Follow Up Tab
Contact Relationship	Patient Chart: Family Contacts
CPT Modifier	Patient Chart: Add/Edit Charges
Disclosure Recipient	Log In/Out drop-down menu > Emergency Override
Family Member Type	Patient Chart: Family History Patient Chart: Family
Medication Action	Patient Chart: Medications
Medication Default Unit Dose Size	Patient Chart: Medications
Medication Frequency	Patient Chart: Medications
Medication Outcome	Patient Chart: Medications
Medication Route	Patient Chart: Medications
Medication Unit Dose Type	Patient Chart: Medications
Message Caller Type	Send Message button
Patient Status	Appointments button
Problem Quality of Life	Patient Chart: History
Problem Stage/Severity	Patient Chart: History
Problem Symptom	Patient Chart: History
Record Change/Delete Reason	Coded Tables
Risk Assessment Type	Risk Assessments
Telehealth Patient Location	Patient Chart: Visit Info
Telehealth Provider Location	Patient Chart: Visit Info
Temperature Method/Normal Range	Patient Chart: Vitals/Growth
VIS Name/Version	Patient Education Button

Adding New Codes

If the item listed in the Code Table Purpose has the box checked to **Allow Edits**:

1. Click the item in the upper section of the window.
2. Click + to add a new element.
3. Add the new element in the lower section of the Code Table window in the blank field by entering:

   - **Description:** This is what will be displayed in drop-down lists. The character limit for this field is 16 characters. Entries over the character limit will prevent the record from being displayed.
   - **Guidelines/Other Data:** This is additional information about the code. The character limit for this field is 16 characters. Entries over the character limit will prevent the record from being displayed.
   - **Reference/Publish Date**
   - **Sort Number**: This is where this element will be displayed in the drop-down list.

4. Click the **Save** button ✓ to save.

Editing Descriptions

If the item listed in the Code Table Purpose has the box checked to **Allow Edits**:

1. Click the item in the upper section of the window.
2. Highlight the element to edit in the lower section of the Code Table.
3. Click the **Edit** button ✏️ .
4. Edit the field(s) that need to be edited. The character limit for the Description and Guidelines/Other Data field is 16 characters. Entries over the character limit will prevent the record from being displayed.
5. Click the **Save** button ✔️ to save your edits.

Deleting or Archiving Elements

If the item listed in the Code Table Purpose has the box checked to **Allow Edits**:

1. Click the item in the upper section of the window.
2. Highlight the element to edit in the lower section of the Code Table.
3. Click the **Delete** button 🗑️ to permanently remove the item or check the box for **Archived** if you do not want to permanently delete this entry but just want to remove the entry from use in a drop-down list.
4. Click the Save button ✔️ to save your changes.

Version 14.10

Utilities > Manage Codes > Coded Values

Overview

The information on this page will provide you with information on how to view and edit allowable selections to dropdown lists. For example, when updating a contact's relationship to a patient, you notice there is not a selection for Foster Parent. That selection may be added to the respective Code Table.
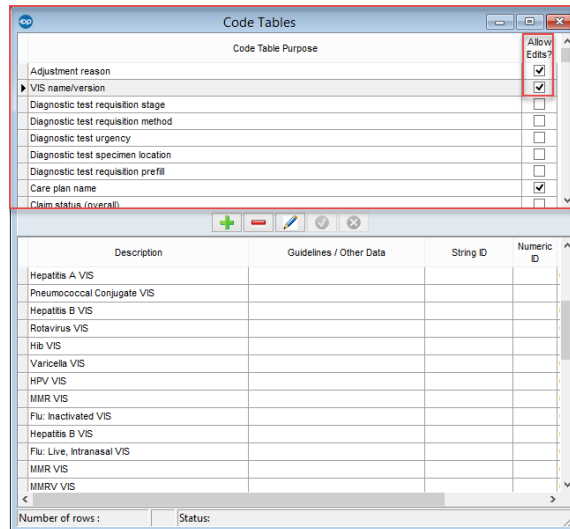
You can access the Code Table to either view or edit an existing code.

Each item on the list in the **Code Table Purpose** section displays a corresponding set of elements in the lower section of the page. Any item listed in the Code Table Purpose section with the box checked to **Allow Edits** can be customized using the Add, Delete, or Edit buttons below.

The most commonly edited Code Tables are:

Code Table Purpose	Correlating Screen or Field in OP
Adjustment Reason	Entering Insurance Payment from the Patient Account
Allergy Stage/Severity	Patient Chart: Allergies/Rxns
Allergy Symptoms	Patient Chart: Allergies/Rxns
Allowed Contact Modes: Billing	Patient Register: Patient Patient Register: Contacts
Allowed Contact Modes: General	Patient Register: Patient Patient Register: Contacts
Allowed Contact Modes:	Patient Register: Patient

Medical	Patient Register: Contacts
Allowed Contact Modes: Messages	Patient Register: Patient Patient Register: Contacts
Allowed Contact Modes: Portal	Patient Register: Patient Patient Register: Contacts
Allowed Contact Modes: Recall	Patient Register: Patient Patient Register: Contacts
Appointment Frequency	Order Worksheet: Follow Up Tab Order Worksheet: Follow Up Tab (Well Visit)
Contact Relationship	Patient Register: Contacts
CPT Modifier	Add / Edit Charges
Disclosure Recipient	Medical Record Disclosure Tracking
Family Member Type	Family Medical History: Encounter Family Medial History: Well Visit
Medication Action	Patient Chart: Medication List Prescription Writer
Medication Default Unit Dose Size	Patient Chart: Medication List Prescription Writer
Medication Frequency	Patient Chart: Medication List Prescription Writer
Medication Outcome	Patient Chart: Medication List Prescription Writer
Medication Route	Patient Chart: Medication List Prescription Writer
Medication Unit Dose Type	Patient Chart: Medication List Prescription Writer
Message Caller Type	Create a Message
Patient Status	Patient Status
Problem Quality of Life	Problem List
Problem Stage/Severity	Problem List
Problem Symptom	Problem List
Record Change/Delete Reason	Record Change Reasons
Risk Assessment Type	Risk Assessments Editor
Telehealth Patient Location	Visit Info for Telehealth
Telehealth Provider Location	Visit Info for Telehealth
Temperature Method/Normal Range	Vital Signs and Growth Measurements
VIS Name/Version	AAP / Local Content Library

Adding New Codes

If the item listed in the Code Table Purpose has the box checked to Allow Edits:

1. Click ➕ to add a new record.
2. **Add** the new element to in the lower section of the Code Table in the open field.
3. Enter a new description.
4. If applicable, enter guidelines or other data, and/or a publication date.
5. If desired, enter a sort number for where this element will display in the list of choices.
6. Click ✅ to save edits.

Editing Descriptions

If the item listed in the Code Table Purpose has the box checked to Allow Edits:

1. **Highlight** the element to edit in the lower section of the Code Table.
2. Click ✏️ to edit.
3. Edit the description, guidelines or other data, publication date, and or sort number.
4. Click ✅ to save edits.

Deleting or Archiving Elements

If the item listed in the Code Table Purpose has the box checked to Allow Edits:

1. **Highlight** the element to edit in the lower section of the Code Table.
2. Click ➖ to permanently remove the element.
3. Check the box for **Archived** if you wish to not permanently delete this entry, and just wish to remove the entry from use in a drop down list.

4. Click ⊘ to save changes.