Office Practicum

Edit a Symptom Template

Last Modified on 10/18/2021 8:35 am EDT

Version 14.19

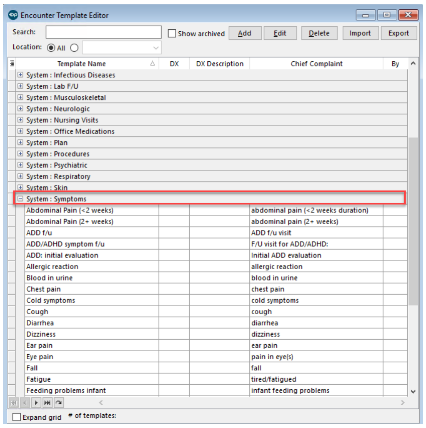
> **Path: Clinical tab > Encounter Templates**

About

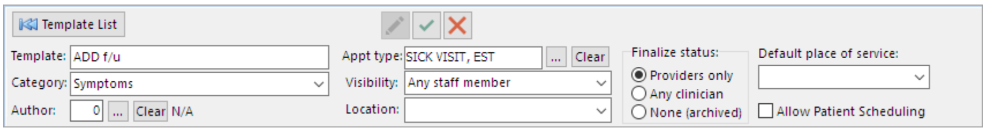
Symptom Templates are displayed for selection in the Appointment Reason drop-down while scheduling an appointment for an Encounter (Sick Visit). Below, you will learn how to customize Symptom Templates to ensure they reflect the workflow of the Practice.

Edit a Template

1. Navigate to the Encounter Template Editor window by following the path above.
2. Expand the **System: Symptoms** group by clicking **+** to the left of the group name.



3. Double-click the Template to edit, or select the Template, and click the **Edit** button. The Template Details are displayed.
4. Click the **Edit** button.
5. Review the Template properties and make edits as needed using the definitions in the table below.

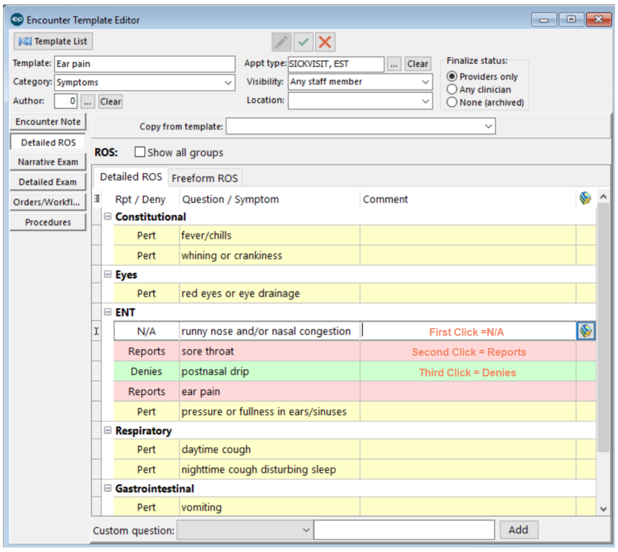


Property	Description
Template	Name given to a Template. Should be named for ease of searching, as this is most often the reason for visit when scheduling an appointment.
Category	Method of organizing templates. All Templates edited in this section will be located in the Symptom category.
Author	Assignment of a Template to a specific user. Templates that have an author selected here may only be edited by that user.
Appt Type	Selection of a default Appointment Type. This is not a requirement to save the Template. If your Practice is recognized as PCMH or working toward recognition for PCMH, be sure to use the **Originating** and **Distant** Appointment Types for Telehealth Templates so that the visits are accurately calculated for AC06.
Visibility	Ability to restrict who can view the selected Template. All symptom Templates have the visibility of Any staff member set by default.

Location	Assignment can be made to view Templates by Location. If there are multiple Locations, leave this field blank to allow availability to all Locations.
Finalize Status	Selection set to who may finalize. Most Templates will be set to Providers only.
Default Place of Service	The Default place of service is not a required field. This field can be used with Templates that are non-office such as Telehealth to automatically populate the Place of Service on the Visit Information tab of an Encounter Note.
Allow Patient Scheduling	Determines whether or not the Template/Appointment Reason will be available for Live Scheduling from the Patient Portal (if enabled by the Practice). Select the checkbox to make the reason available.

6. Click the **Encounter Note** tab if not already selected, and review the fields, making changes as needed. Phrase Construction is available in each field to insert phrases.
7. Click the **Detailed ROS** tab to access and set the ROS Questions/Symptoms. By default, all are set to Pert. Pert Questions/Symptoms display when the Template is opened.
8. In the Rpt/Deny column, click to select the defaults to display when the Template is applied.

   - Click once to mark **N/A**. Questions/Symptoms marked N/A are not displayed when the Template is applied.
   - Click twice to mark **Reports**. Questions/Symptoms marked Reports are displayed when the Template is applied and can be edited during Encounter documentation.
   - Click three times to mark **Denies**. Questions/Symptoms marked Denied are displayed when the Template is applied and can be edited during Encounter documentation.



9. Click the **Orders/Workflow** tab and review the following tabs, making edits as needed:

   - **Medications Tab**
   - **Diagnostic Tests Tab**
   - **Immunizations Tab**
   - **Resources Tab**
   - **Surveys Tab**
   - **Follow-up Tab**
   - **Other Tasks Tab**

10. Click the **Save** button.
11. The below steps are optional and are not typical of a Symptom template.

    a. Click the **Narrative Exam** and **Detailed Exam** tabs to review the contents and make edits as needed.
    b. Click the **Procedures** tab to review the contents and make **edits** as needed.

12. Click the **Save** button.
13. If additional Templates require review, click the **Template List** button to return to the list of Templates, otherwise, close the window.

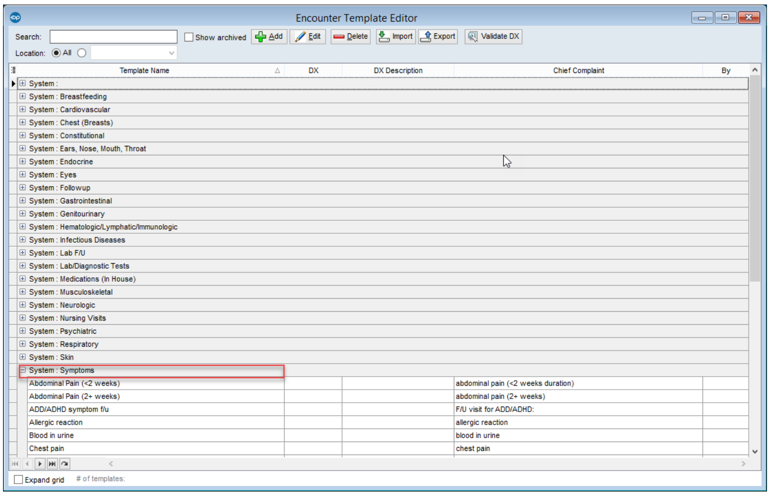
Version 14.10

Utilities > Manage Clinical Features > Encounter Template Editor

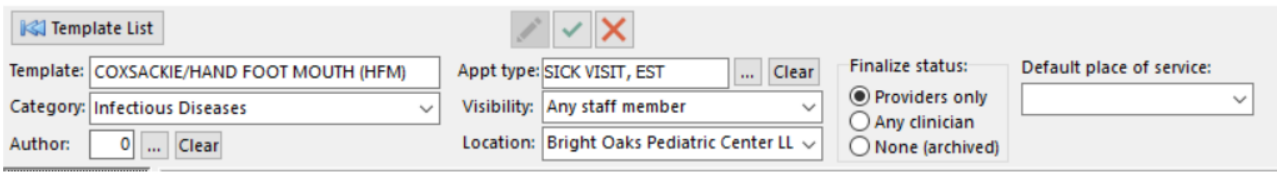
Overview

You will have an understanding of the content of a typical symptoms template. You will be instructed on methods of customization to ensure the symptom templates reflect the workflow of the practice.

1. Click **Utilities** in the main menu.
2. Select **Manage Clinical Features**.
3. Select **Encounter Template Editor**. The template list displays.
4. Click the **plus** to expand System:Symptom group.



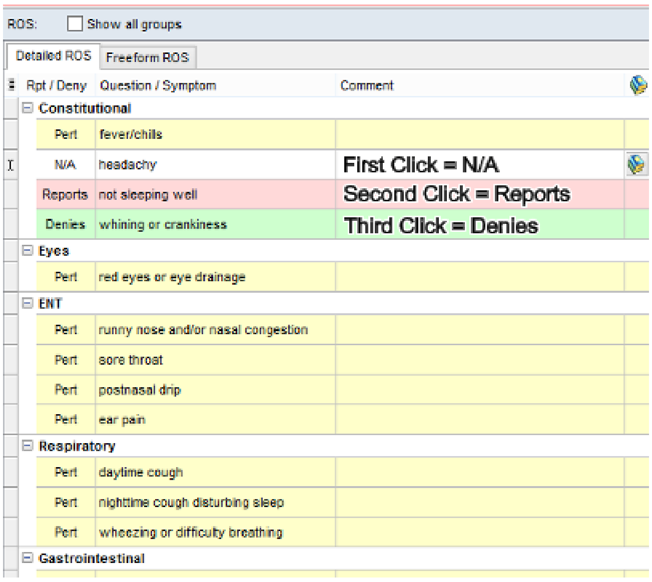
5. Select a template and click the **Edit** button .
6. Review the template properties using the table definitions below.



Property	Description
Template	Name given to a template. Should be named for ease of searching, as this is most often the reason for visit when scheduling an appointment.
Category	Method of organizing like templates. All templates edited in this section will be located in the Symptom category.
Author	Assignment of a template to a specific user. Templates assigned an author may only be edited by that user.
Appt Type	Selection of a default appointment type. Not a requirement to save the template.
Visibility	Ability to restrict who can view the selected template. All symptom templates will have a visibility of Any staff member.

Property	Description
Location	Assignment can be made to view templates by location. If there are multiple locations leave this field blank to allow availability to all locations.
Finalize Status	Selection set to who may finalize. Most templates will be set to Providers only.

7. Click the **Encounter Note** tab if not already selected.
8. Review the **CC** field. Click into the text field to add or edit text or use the **Phrase Construction** button to insert phrases.
9. Review the **HPI** field. Click into the text field to add or edit text or use the **Phrase Construction** button to insert phrases.
10. Click the **Detailed ROS** tab. Set the ROS Questions/Symptoms.



Setting	Description
Pert	Relevant symptom/question to display when template is opened.
Reports	Positive for the symptom/question
Denies	Denies the symptom/question
N/A	Not applicable for the template. Removes from the group list.

Note: Select the checkbox **Show all groups** to see other Review of System groups.

Optional tabs, Orders/Workflow and Procedures. Click here to navigate to additional information on completing these tabs.

11. Click the **Save changes to template** button.