Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Orders and Workflow Surveys Tab

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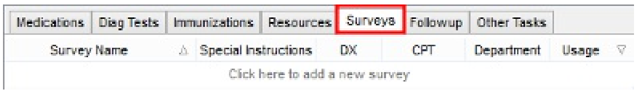
Version 20.4

Overview

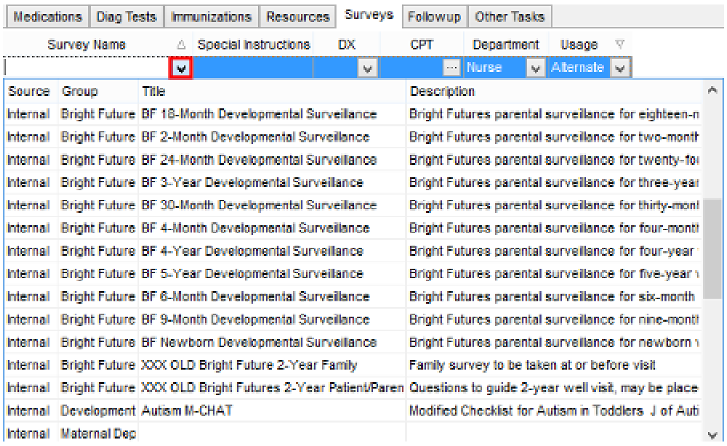
This section of the template design demonstrates how to add, edit or delete surveys associated to a template.

Add a Survey

1. From the **Orders/Workflow** tab, click the **Surveys** tab.



2. Click the **Add** button or click into the *Click here to add a new survey* field.
3. Click the drop-down and select a survey from the list.



4. (*Optional*) Type instructions for the survey in the *Special Instructions* field.
5. (*Optional*) Click the drop-down in the *ICD-10* field, the diagnosis search window displays.

- Type a code or description and click the **Search** button.
- Double-click - OR - highlight a diagnosis code and click the **Select** button.

6. (*Optional*) Click the **ellipses** button in the *CPT* field, the procedure window displays.

- Select a **Category**.
- Highlight the procedure code and click the **Use** button.

Note: If the CPT code is not found in the categories, you may select the **Lookup CPT** button.

7. Click the drop-down in the *Department* field and select from the list.

Note: If the survey is to be sent to the Patient Portal, select the Department of **Patient**.

8. Click the drop-down in the *Usage* field and select from the list. Use the table below for a definition of each usage.

Usage	Definition
Alternate	Will show the item in the task window. An alternate item needs to be selected at time of charting.
Routine	Will show the item in the task window with a check mark already selected in the add box. A routine item is selected for task submission at time of charting.
Standing	A standing order is submitted as a task to the selected department when the template is used at time of charting.

9. Click the **Save** button.

Edit a Survey

1. From the **Orders/Workflow** tab, click the **Surveys** tab.
2. Click to highlight a survey to edit.
3. Click the drop-down and select a survey from the list.
4. (*Optional*) Type instructions for the survey in the *Special Instructions* field.
5. (*Optional*) Click the drop-down in the *ICD-10* field, the diagnosis search window displays.
    - Type a code or description and click the **Search** button.
    - Double-click - OR - highlight a diagnosis code and click the **Select** button.
6. (*Optional*) Click the **ellipses** button in the *CPT* field, the procedure window displays.
    - Select a **Category**.
    - Highlight the procedure code and click the **Use** button.
7. Click the drop-down in the *Department* field and select from the list.

Note: If the survey is to be sent to the Patient Portal, select the Department of **Patient**.

8. Click the drop-down in the *Usage* field and select from the list.
9. Click the **Save** button.

Delete a Survey

1. From the **Orders/Workflow** tab, click the **Surveys** tab.
2. Click to highlight a survey to delete.
3. Click the **Delete** button.