Add a Symptom Template

Last Modified on 03/24/2020 12:47 pm EDT

Version 14.19

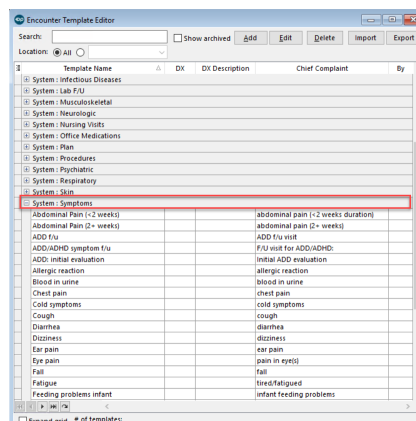## Path: Clinical tab > Encounter Templates

Overview

You will have an understanding of the content of a typical symptoms template. You will be instructed on building a symptom template from scratch. Your understanding of symptom templates and their uses will ensure that the symptom templates reflect the workflow of the practice.

1. Click the **Clinical** tab and select **Encounter Templates**. The Encounter Template Editor displays.
2. Click the plus to expand **System : Symptom** group.

💡 **Tip:** It is recommended you expand the System : Symptom group to ensure you do not duplicate a template.

3. Click the **Add** button.
4. Add the template using the properties table definitions below.

Property	Description
Template	Name given to a template. Should be named for ease of searching.
Category	Method of organizing like templates. All templates added 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 are preset to be visible to any staff member.
Location	Assignment can be made to view templates by location. If there are multiple locations leave this field blank.
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.

5. Click the **Encounter Note** tab if not already selected.
6. Enter a complaint in the **CC** field or use the Phrase Construction button 📗 to insert phrases.
7. Enter the history of the complaint in the **HPI** field or click the Phrase Construction button 📗 to insert phrases.
8. 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 all Review of System groups .

Optional tabs, Orders/Workflow and Procedures. Click **here** to navigate to additional

information on completing these tabs.
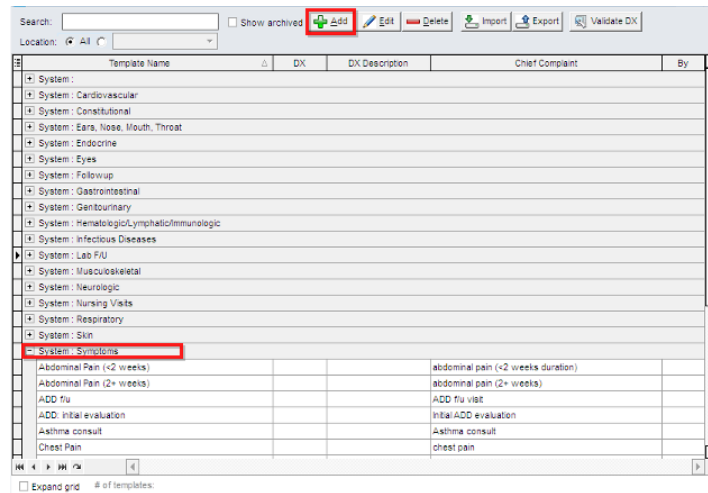
9. Click the **Save** button.

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
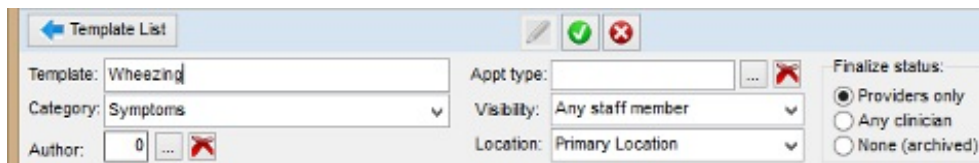
instructed on building a symptom template from scratch. Your understanding of symptom templates and their uses will ensure that the symptom templates reflect the workflow of the practice.

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.

> ℹ It is not required to expand the group but is best practice to make sure you do not duplicate a template.
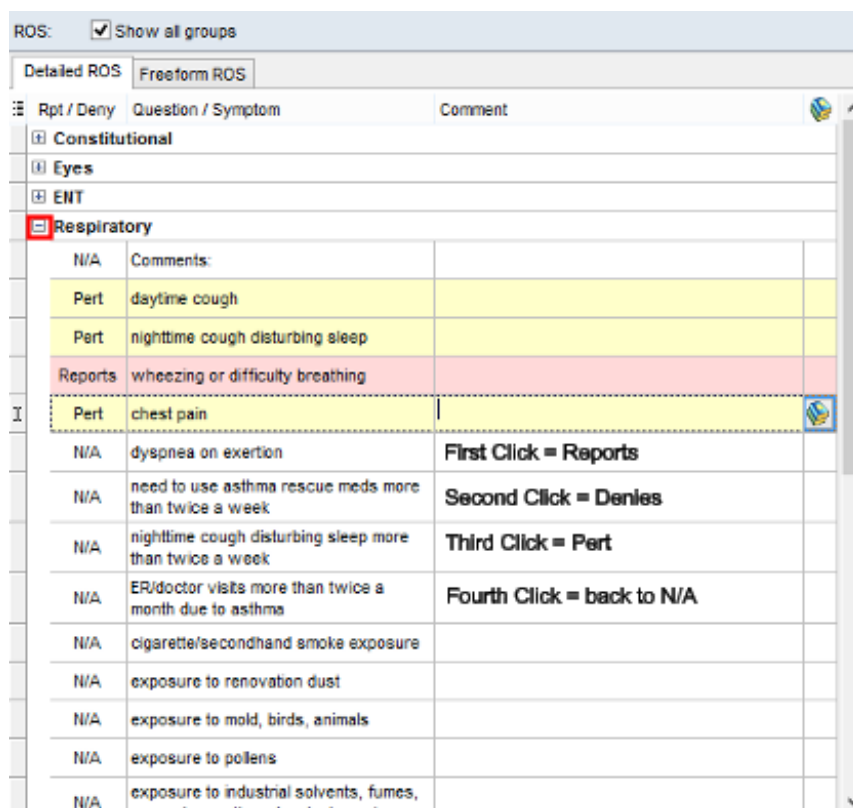
5. Click the **Create a new template** button ⊞ Add .
6. Add the template properties using the table definitions below.

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Template	Name given to a template. Should be named for ease of searching.
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Appt Type	Selection of a default appointment type. Not a requirement to save the template.

Property	Description
Visibility	Ability to restrict who can view the selected template. All symptom templates are preset to be visible to any staff member.
Location	Assignment can be made to view templates by location. If there are multiple locations leave this field blank.
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. Enter a complaint in the **CC** field or use the Phrase Construction button 📙 to insert phrases.
9. Enter the history of the complaint in the **HPI** field or click 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.

> **ⓘ** 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 ✅ .