

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**

Copy a Template

Last Modified on 03/24/2020 12:50 pm EDT

Version 14.19

Path: Clinical tab > Encounter Templates

Overview

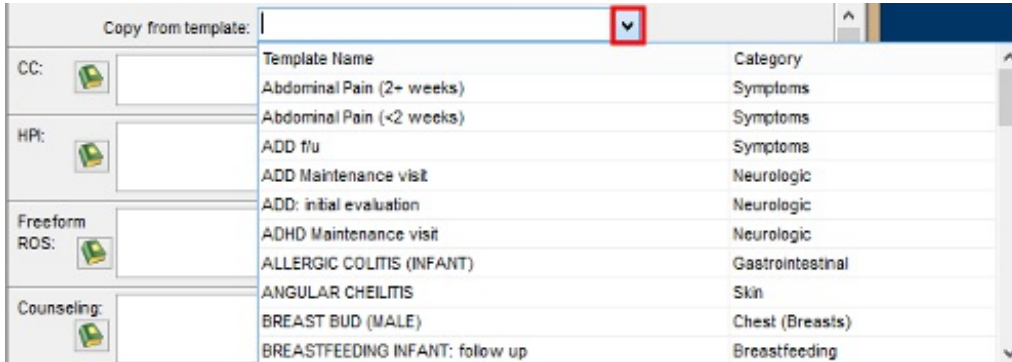
Use the Copy From Template Feature to create a new template:

1. Click the **Clinical** tab and select **Encounter Templates**. The Encounter Template Editor displays.
2. Click the **Add** button.
3. 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. Click the drop-down and select the category the template will be saved.
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	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

Property	Description
service	Place of service on the Visit Information tab of an encounter note.

- Click the **Encounter Note** tab if not already selected.
- Click the drop-down arrow and select a template to copy.



- Once you have copied from another template, you can then make changes, add Orders and/or Procedures for the new template.


Note: You can use the Copy feature on the Encounter Note tab, Detailed ROS tab, Detailed Exam tab. The feature is *not* available for the Orders/Workflow or Procedures tabs.

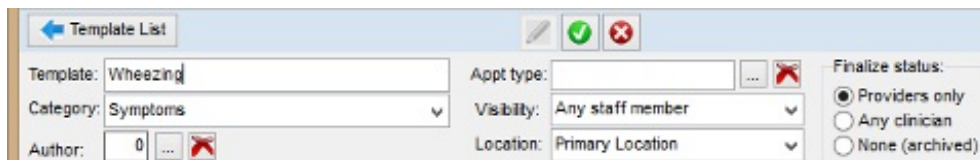
Version 14.10

Utilities > Manage Clinical Features > Encounter Template Editor

Overview

Use the Copy From Template Feature to create a new template:

- Click the **Create a new template** button .
- Add the template properties using the table definitions below.



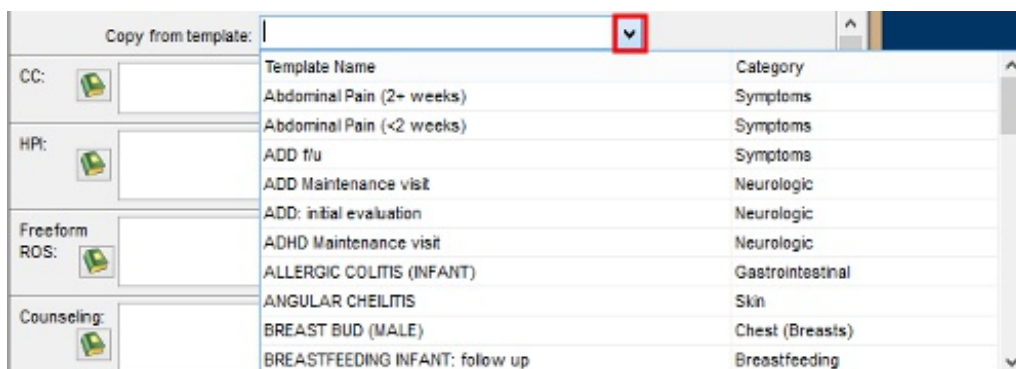
Template: Wheezing	Appt type: []	Finalize status: <input checked="" type="radio"/> Providers only
Category: Symptoms	Visibility: Any staff member	<input type="radio"/> Any clinician
Author: 0	Location: Primary Location	<input type="radio"/> None (archived)

Encounter Template Editor: Template Properties

Property	Description
Template	Name given to a template. Should be named for ease of searching.

Property Category	Description
Visibility	Ability to restrict who can view the selected template. All symptom templates will have a visibility of Any staff member.
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.
Location	Assignment can be made to view templates by location.
Finalize Status	Selection set to who may finalize. Most templates will be set to Providers only.

3. Click the **Encounter Note** tab Encounter Note if not already selected.
4. Click the drop-down arrow and select a template to copy.



Encounter Template Editor: Copy From Template List

5. Once you have copied from another template, you can then make changes, add Orders and/or Procedures as needed for the new template you created using the Copy feature.

Note: You can use the Copy feature on the Encounter Note tab, Detailed ROS tab, Detailed Exam tab. The feature is not available for the Orders/Workflow or Procedures tabs.