Layer Templates

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Version 20.10

About

Additional templates can be applied or layered when working from the following sections of the Encounter Note:

- CC/HPI/ROS
- Detail Exam
- Assess/Plan
- Orders/Procedures

The template that is applied, along with the tab that it is applied from, will determine which section(s) of the template will be added to the Note.
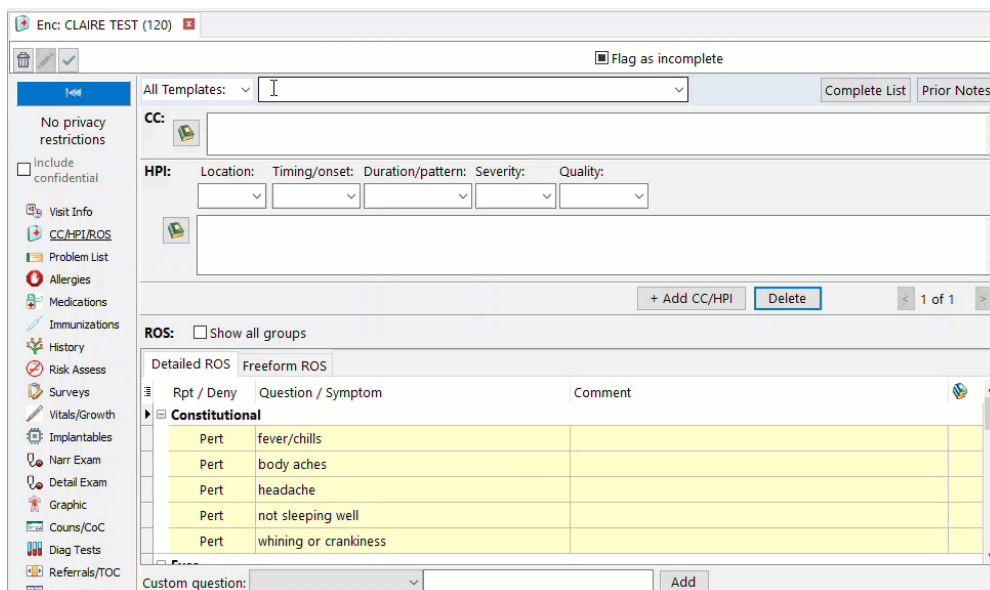
Layering Symptom Templates

1. From the CC/HPI/ROS window, click into the **All templates** field and begin typing the name of the Symptom Template, or click the drop-down and select from the list.

> 📌 **Note**: If you need to add an additional symptom without applying another template, click the **+ Add CC/HPI** button to create a blank form. Then, may use any of the methods below to complete the CC and HPI sections of the form:
> - Type a complaint into the CC field and select from the drop-downs or type in the text field of HPI.
> - Click the **Complete List** button and select a template.
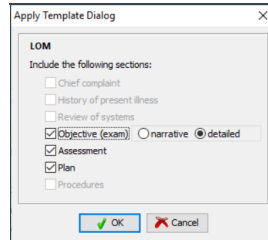> - Click the **Prior Notes** button and select a note or message to populate the CC field.

2. In the Apply Template Dialog window that displays, review the note sections that will be applied; deselect the checkbox next to sections that should not be applied.
3. Click **OK** to apply the template. The CC/HPI count is increased to show the new number of CC/HPIs, and you can use the toggle arrows to move through the CC/HPIs that have been added to the Encounter.
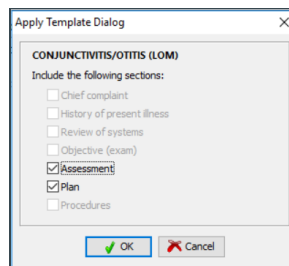
Layering Diagnosis Templates

1. From the **Detail Exam** window, click into the **All templates field** and begin typing the name of the Diagnosis Template or click the drop-down and select from the list.
2. In the Apply Template Dialog window that displays, review the note sections that will be applied; deselect the checkbox next to sections that should not be applied.

3. Click **OK** to apply the template.

Layering Assess/Plan

1. From the **Assess/Plan** window, click into the **All templates** field and begin typing the template name, or click the drop-down and select from the list.
2. In the Apply Template Dialog window that displays, review the note sections that will be applied; deselect the checkbox next to sections that should not be applied.

3. Click **OK** to apply the template.

Layering Order and Procedure Templates

1. From the **Orders** window, click into the **All templates** field and begin typing the name of the Order or Procedure Templat, or click the drop-down and select from the list.
2. In the Apply Template Dialog window that displays, review the note sections that will be applied; deselect the checkbox next to sections that should not be applied.
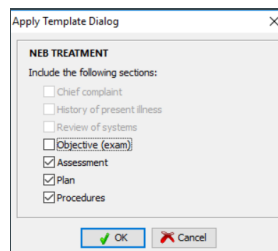
3. Click **OK** to apply the template.
4. In the case of an Order or Procedure Template, review the tabs of the Order Worksheet to confirm all orders are selected and tasked, as appropriate.

Layering an Author-Specific Template

In any of the above sections, you have an option to layer templates that are author-specific. These are templates that have been

saved by a user and the user is assigned as the author in the Encounter Template Editor.

1. From any of the above sections, click the drop-down for All Templates and select **Author Specific**.

2. Click the drop-down in the Author List field and select an author. Deselect the Unassigned checkbox.
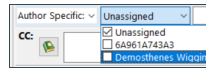
3. Begin typing the name of the template, or click the drop-down and select from the list.
4. In the Apply Template Dialog window that displays, review the note sections that will be applied; deselect the checkbox next to sections that should not be applied.
5. Click **OK** to apply the template.

Version 20.8

Overview

Additional templates can be applied when working from the following the sections of the encounter note. The template that is applied, along with the tab that it is applied from, will determine which section of the template will be added to the note.

- CC/HPI/ROS
- Detail Exam
- Assess/Plan
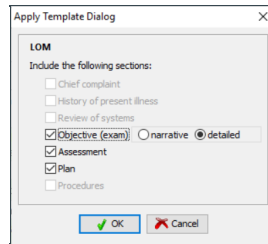
Layering Symptom Templates

1. From the **CC/HPI/ROS** window, click into **All templates**. Begin typing the symptom template name or click the drop-down and select from the list.
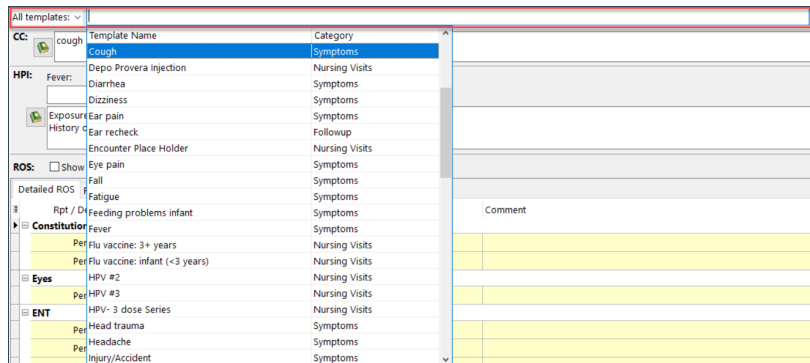
2. The Apply Template Dialog window displays with the note sections that will be added.
3. (*Optional*) If a section should not be applied, uncheck the checkbox next to the section name.
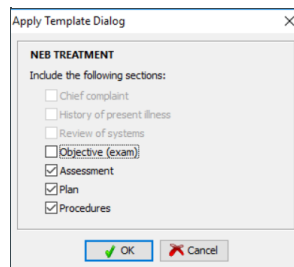4. Click **OK** to apply the template.

Layering Diagnosis Templates

1. From the **Detail Exam** window, click into **All templates**. Begin typing the diagnosis template name or click the drop-down and select from the list.
2. The Apply Template Dialog window displays with the note sections that will be added.

3. (*Optional*) If a section should not be applied, uncheck the checkbox next to the section name.
4. Click **OK** to apply the template.

Layering Order and Procedure Templates

1. From the **Plan/Orders** window, click into **All templates**. Begin typing the order or procedure template name or click the drop-down and select from the list.
2. The Apply Template Dialog window displays with the note sections that will be added.

3. (*Optional*) If a section should not be applied, uncheck the checkbox next to the section name.
4. Click **OK** to apply the template.
5. In the case of a procedure or order template, review the tabs of the Order Worksheet. Confirm all orders are selected and tasked.