

# Patient Encounter: Assess/Plan

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Version 20.13

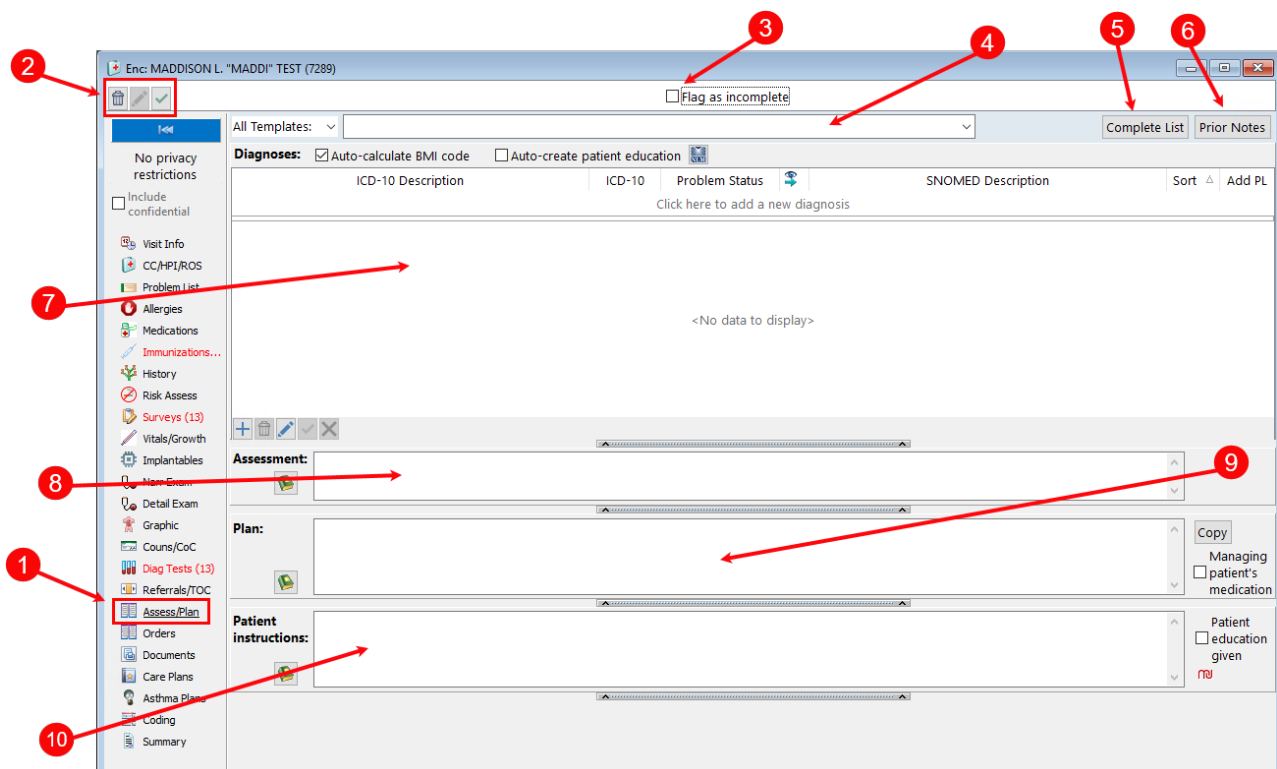


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

## About Patient Encounter: Assess/Plan


**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounter > New or Open Note button > Assess/Plan**

The Assess/Plan window codes the visit with Diagnosis codes, adds the Assessment of the diagnosis and adds/modifies the Plan and Patient Instructions for the Encounter.



## Patient Encounter: Assess/Plan Map

Number	Section	Description
1	Assess/Plan button	The Assess/Plan button accesses the Assessment/Plan window in the patient's Encounter Note.
2	Encounter Function buttons	The Function buttons delete an entire Encounter Note, edit an Encounter Note, or save an Encounter Note.
3	Flag as Incomplete checkbox	The Flag as Incomplete checkbox marks the Encounter as unfinished.

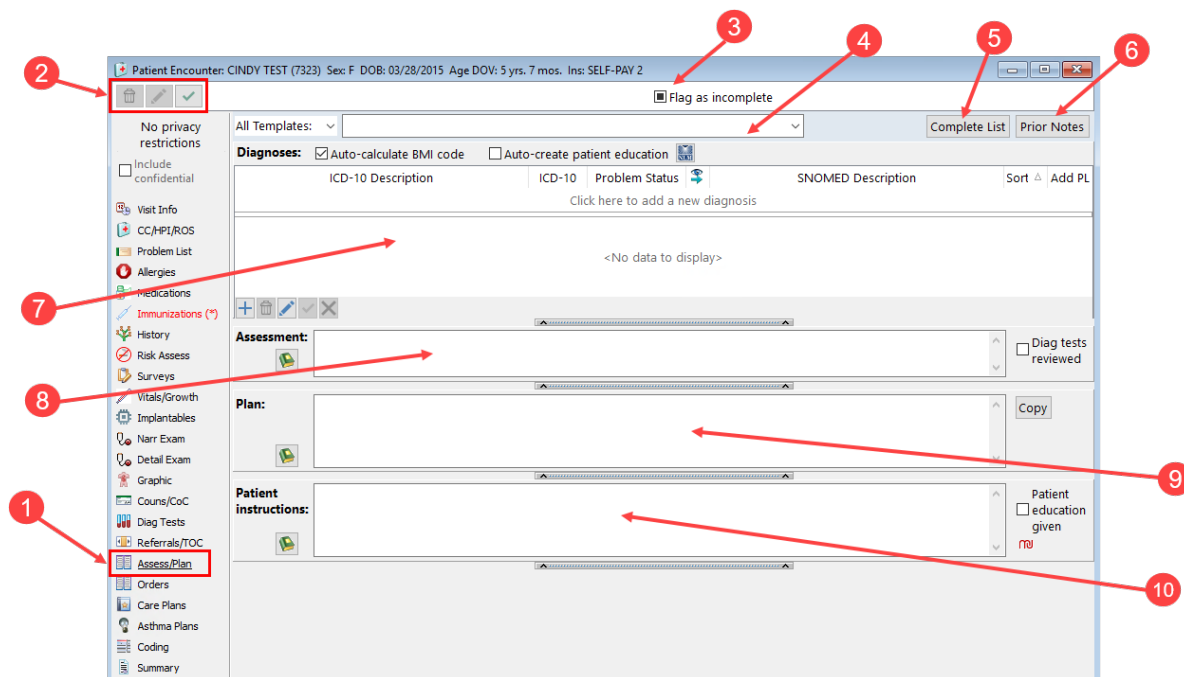
4	All Templates	The All Templates field is used to select an Encounter Template that was created or edited in the Encounter Template Editor. Predefined information populates the Encounter when a template is selected.
5	Complete List button	The <b>Complete List</b> button provides a complete list of Encounter templates.
6	Prior Notes button	The <b>Prior Notes</b> button views prior notes and messages for the selected patient.
7	Diagnoses panel	The Diagnoses panel manages diagnoses codes for the Encounter. Use the function buttons in the panel to insert, delete, edit, change sort numbers, add to Problem List and save the diagnoses. This panel also includes the options to <b>Auto-calculate BMI</b> and <b>Auto-create patient education</b> to automatically create a task for a handout and send it to the Patient Portal.
8	Assessment panel	The Assessment panel is used to document Assessment notes to the diagnosis for the Encounter. This panel includes a <b>Phrase Construction</b> button  for easy access to your Practice's pre-written phrases.
9	Plan panel	The Plan panel text box provides notes to the Plan (solution). The notes in this text box are displayed based on the selected template. Phrase Construction is also available in this panel. The <b>Managing patient's medication</b> checkbox is used to document that prescriptions were created or managed on the date of visit. This counts toward MDM Risk of Complications for E/M coding.
10	Patient Instruction panel	The Patient Instruction panel is used to include patient instruction given to the patient. The notes in this text box are displayed based on the selected template. Phrase Construction is also available in this panel. The <b>Patient education given</b> checkbox is used to add an indication that the patient was provided with the proper instruction for the reason of the patient Encounter and the solution to resolve the diagnostic assessment.

Version 20.12


## About Patient Encounter: Assess/Plan

**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounter > New or Open Note button > Assess/Plan**

The Assess/Plan window codes the visit with diagnosis codes, adds the assessment of the diagnosis, and adds/modifies the plan and patient instructions for the Encounter.



## Patient Encounter: Assess/Plan Map

Number	Section	Description
1	Assess/Plan button	The Assess/Plan button opens the Assessment/Plan window in the patient's encounter note.
2	Encounter Function buttons	The Function buttons delete an entire encounter note, edit an encounter note, or save an encounter note.
3	Flag as Incomplete checkbox	The Flag as Incomplete checkbox will mark an encounter as unfinished.
4	All Templates	The All Templates field is used to select an encounter template that was created or edited in the Encounter Template Editor. Predefined information will appear in the encounter when a template is selected.
5	Complete List button	The Complete List button provides a complete list of encounter templates.
6	Prior Notes button	The Prior Notes button views prior notes and messages for the selected patient.
7	Diagnoses panel	The Diagnoses panel manages diagnoses codes for the patient encounter. Use the function buttons in the panel to insert, delete, edit, change sort numbers, add to problem list and save a patient encounter diagnosis record. This panel also includes the options to <b>Auto-calculate BMI</b> and <b>Auto-create patient education</b> to automatically create a task for a handout and send it to the patient portal.
8	Assessment panel	The Assessment panel is used to provide assessment notes to the diagnosis for the patient encounter. This panel also includes a Phrase Construction button  and the Diagnostic Test Reviewed checkbox to add an indication into the Assessment text box that a Diagnostic Test was reviewed.
9	Plan panel	The Plan panel text box provides notes to the plan (solution). The notes in this text box are displayed based on the template chosen. A Phrase Construction button is also available in this panel.
10	Patient Instruction panel	The Patient Instruction panel is used to include patient instruction given to the patient. The notes in this text box are displayed based on the template chosen. This panel also include a Phrase Construction button and the <b>Patient education given</b> checkbox to add

		an indication that the patient was provided with the proper instruction for the reason of the patient encounter visit and the solution to resolve the diagnostic assessment.
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