Patient Encounter: Templates (Complete List)

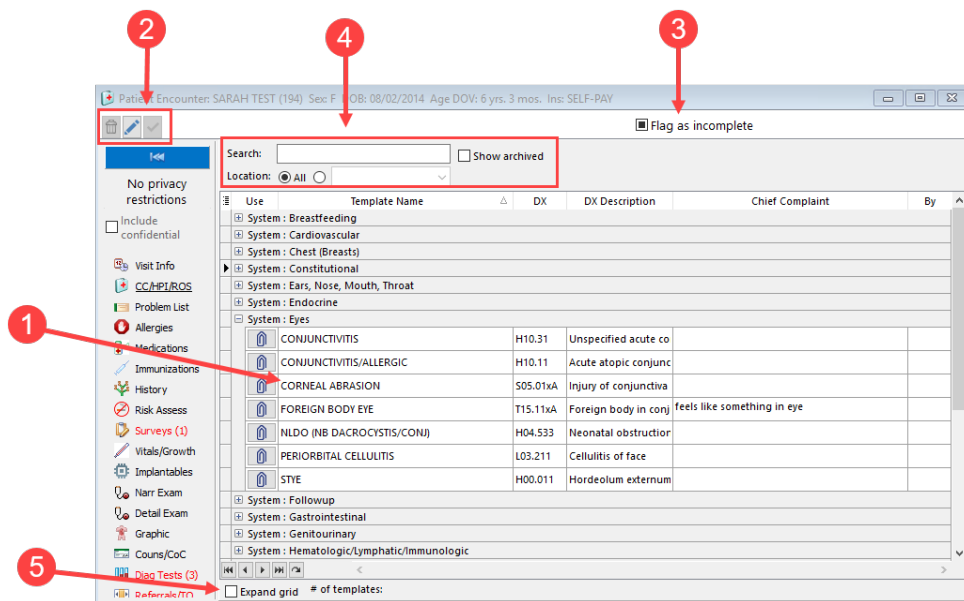Last Modified on 09/22/2021 12:21 pm EDT

Version 20.10

> 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: Templates (Complete List)

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounters > New or Open Note button > Complete List button in various Encounter windows**

The Templates window lists the templates that are created, edited, and reviewed in the **Encounter Templates Editor**. Templates are pre-written scenarios you can use in an Encounter to document common pediatric diagnoses. Templates include detailed descriptions of the usual pertinent positive and negative findings of a wide variety of illnesses, with a standard assessment, plan, and ICD-10 coding. Included with your installation of Office Practicum are Pediatric- specific templates.

Patient Encounter: Templates Map

Number	Section	Description
1	Templates grid	The Templates grid lists the templates that are created, edited, and reviewed in the Encounter Templates Editor and grouped by system. Double-clicking the template name opens the Apply Template Dialog to apply the template notes to the current Encounter.
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 an Encounter as unfinished.

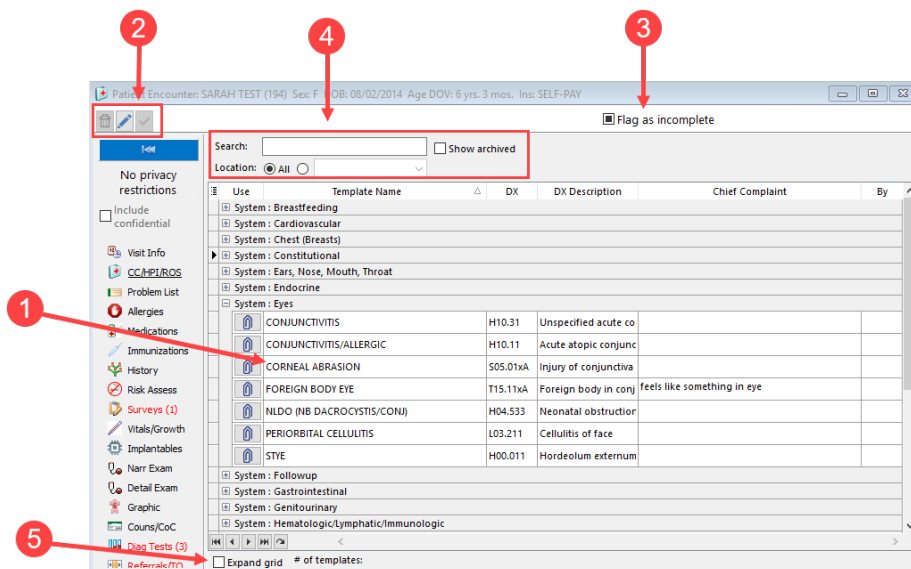| 4 | Search Criteria | The Search Criteria fields are used to narrow the templates inside the template grid. The search bar narrows the template list based upon the characters entered into the search bar. Selecting the Show Archived checkbox displays archived templates with the templates that are still used in the Template grid. The location field narrows the templates displayed in the template grid based upon the templates used at specific locations. |
| 5 | Expand grid checkbox | The Expand Grid checkbox expands all the collapsed categories in the Templates grid to display the templates or collapses all the expanded categories in the Templates grid to hide the templates. |

Version 20.8

About Patient Encounter: Templates

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounter > New or Open Note button > Complete List button in various Encounter windows**

The Patient Encounter helps to code and complete an encounter visit. The encounter note encompasses both narrative and comprehensive formats. It also allows you to customize the layout of the note. The note is added to the patient chart.

The Templates window lists the templates that are created, edited, and reviewed in the **Encounter Templates Editor**. Templates are pre-written scenarios you can use in an encounter to document common pediatric diagnoses. Templates include detailed descriptions for the usual pertinent positive and negative findings of a wide variety of illnesses, with a standard assessment, plan and ICD-10 coding. Included with your installation of Office Practicum are Pediatric specific templates.

Patient Encounter: Templates Map

Number	Section	Description
1	Templates grid	The Templates grid lists the templates that are created, edited, and reviewed in the **Encounter Templates Editor**. The Templates are grouped by system. Double-click the selected template to review notes in the template. Click the paperclip next to the template name to open the **Apply Template Dialog** to apply the template notes to the current encounter.

Office Practicum

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	Search Criteria	The Search Criteria fields are used to narrow the templates inside the template grid. The search bar narrows the template list based upon the characters entered into the search bar. Selecting the Show Archived checkbox displays archived templates with the templates that are still used in the Template grid. The location field narrows the templates displayed in the template grid based upon the templates used at specific locations.
5	Expand grid checkbox	The Expand Grid checkbox expands all the collapsed categories in the Templates grid to display the templates or collapses all the expanded categories in the Templates grid to hide the templates.