

# Well Visit: Assessment

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Version 14.19

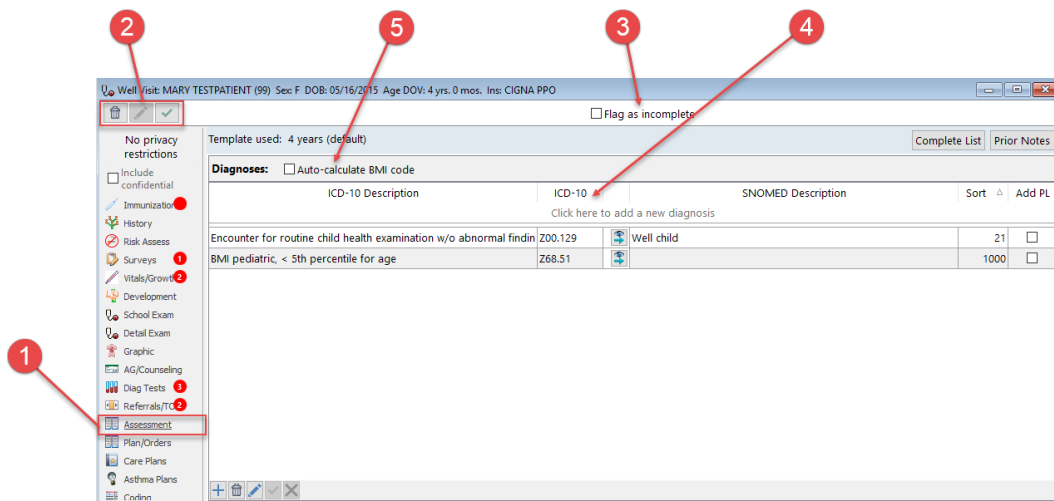


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

## About Well Visit: Assessment

**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Well Visits > New or Open Note button > Assessment**

The Assessment window codes the Well Visit with diagnosis codes.



## Well Visit: Assessment Map

Number	Section	Description
1	Well Visit Assessment	Accesses the Assessment section of the Well Visit Note.
2	Well Visit Function buttons	The function buttons delete an entire Well Visit Note, edit a Well Visit Note, or save a Well Visit Note.
3	Flag as Incomplete checkbox	Marks the Well Visit Note as unfinished.
4	Diagnoses panel	The Diagnoses panel manages diagnoses codes for the Well Visit. The function buttons in the panel are used to insert, delete, edit, change sort numbers, add a diagnosis to the problem list, and save a diagnosis record.
5	Auto-calculate BMI code checkbox	The Auto-calculate BMI code checkbox automatically applies the BMI diagnosis codes based on BMI percentile (not absolute value) for patients 2 to 18 years of age. The codes applied are as follows: <ul style="list-style-type: none"> <li>Z68.51 (&lt;5%)</li> <li>Z68.52 (5% - 85%)</li> <li>Z68.53 (85% - 95%)</li> </ul>

- Z68-54 (>95%)

Version 14.10

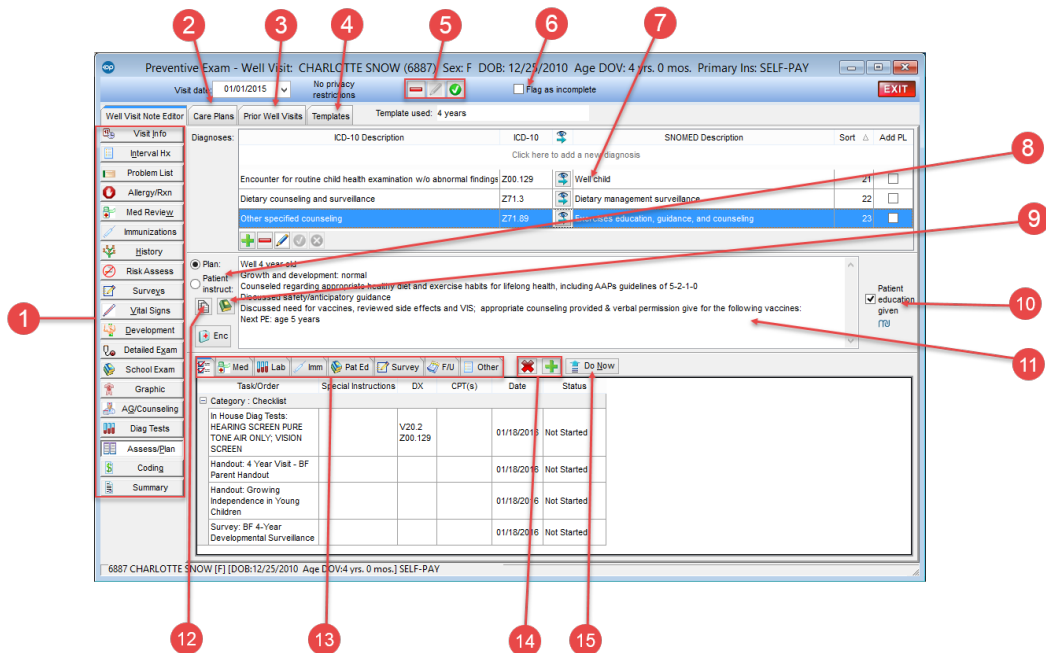
## About Preventive Exam: Assess/Plan Tab

**Path: Smart Toolbar > Chart button > Well Visits tab > Open Note button > Assess/Plan tab**

**Path: Smart Toolbar > Schedule Button > Well Visit tab > Edit button > Assess/Plan tab**


The Preventive Exam window charts a patient well-visit exam. The Preventive Exam window helps to code and complete a preventive encounter visit. The preventive exam 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 Assess/Plan tab codes the visit with diagnosis codes, adds/modifies the plan and patient instructions for the encounter, and allows for orders to be created. It also includes the Order Worksheet, allowing you to place lab orders, medication orders, patient education, surveys, and follow up visits.



## Preventive Exam: Assess/Plan Tab Map

Number	Section	Description
	Well Visit Note Editor	<p>The Well Visit Note Editor documents the patient preventive exam. The Well Visit Note Editor contains the following tabs:</p> <ul style="list-style-type: none"> <li>• <a href="#">Visit Info</a></li> <li>• <a href="#">Interval Hx</a></li> <li>• <a href="#">Problem List</a></li> <li>• <a href="#">Allergy/Rxn</a></li> <li>• <a href="#">Med Review</a></li> <li>• <a href="#">Immunizations</a></li> <li>• <a href="#">History</a></li> <li>• <a href="#">Risk Assess</a></li> <li>• <a href="#">Surveys</a></li> </ul>

1	tab	<ul style="list-style-type: none"> <li>• <b>Vital Signs</b></li> <li>• <b>Development</b></li> <li>• <b>Detailed Exam</b></li> <li>• <b>School Exam</b></li> <li>• <b>Graphic</b></li> <li>• <b>AG/Counseling</b></li> <li>• <b>Diag Tests</b></li> <li>• <b>Assess/Plan</b></li> <li>• <b>Coding</b></li> <li>• <b>Summary</b></li> </ul>
2	Care Plans tab	The <b>Care Plans</b> tab lists, prints, and manages care plans for a patient's health maintenance schedule.
3	Prior Well Visits tab	The <b>Prior Well Visits</b> tab lists the previous preventive exam notes.
4	Templates tab	The <b>Templates</b> tab lists the templates that are created, edited, and reviewed in the <b>Well Visit Template Editor</b> . Templates are pre-written scenarios you can use in a well visit 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.
5	Function buttons	The Function buttons delete an entire well visit note, edit a well visit note, or save an well visit note.
6	Flag as Incomplete checkbox	The Flag as Incomplete checkbox will mark a well visit as unfinished.
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 a diagnosis to the problem list and save a diagnosis record.
8	Plan/Patient Instruction panel	The Plan and Patient Instruction panel text box provide notes to the plan (solution) and patient instructions. The notes in this text box will appear based upon the Plan/Patient Instruction radio button selections.
9	Phrase Construction button	The <b>Phrase Construction</b> button opens the <b>Phrase Construction</b> window. Phrase Construction assists with the creation of notes and other text-based descriptions.
10	Plan/Patient Instruction radio buttons	The Plan and Patient Instruction radio buttons are used to toggle between the notes inside the Plan or Patient Instruction text box. Selecting Plan will display the Plan notes in the text box. Selecting Patient Instruction will display the note inside the patient instructions text box.
11	Patient Education Given checkbox	The patient education given checkbox provides 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.
12	Copy button	The <b>Copy</b> button copies the text in the plan notes and pastes the notes in the patient instructions text box. This will erase any pre-existing text and replace with the Plan text.
		<p>The <b>Order Worksheet</b> assigns tasks to departments within the practice. Tasks can be associated to an encounter or well-visit template and automatically populate the Order Worksheet. Tasks can also be assigned through each of the tabs located on the Order Worksheet.</p> <ul style="list-style-type: none"> <li>•  : The Order Worksheet Summary tab displays the tasks/orders with their</li> </ul>

13	Order Worksheet	<p>corresponding special instructions, diagnosis, CPT codes, date, and status.</p> <ul style="list-style-type: none"> <li> : The <b>Medication Entry tab</b> allows you to create, add, refill, print, send and review prescriptions from this location.</li> <li> : The <b>Diagnostic Test and Lab Entry tab</b> is where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition from this location.</li> <li> : The <b>Immunization tab</b> allows you to create and modify tasks for immunizations in this location. Clicking the needle icon accesses the patient's immunization chart. Recommended vaccines are indicated at the bottom of the order worksheet.</li> <li> : The <b>Patient Education tab</b> allows you to create, modify, and view resource/handout orders from this location.</li> <li> : The <b>Survey tab</b> allows you to create, modify, and administer survey orders from this location. Clicking the Do Now button opens the Survey window.</li> <li> : The <b>Follow Up Task tab</b> allows you to create and modify follow up orders, and select to schedule a followup from this location. Clicking the Do Now button opens the Schedule and Practice Workflow window</li> <li> : The <b>Other Task tab</b> is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks from this location. Clicking the Add Referral Letter button opens the <b>Referral/Care Transaction Details</b> window.</li> </ul>
14	Order Worksheet Task buttons	<p>The Order Worksheet Task buttons are used to:</p> <ul style="list-style-type: none"> <li> : Delete a task, remove highlighted order.</li> <li> : Save and assign tasks. Creates a checklist of tasks for the current tab.</li> </ul>
15	Do Now button	The <b>Do Now</b> button performs the selected task.