

Well Visit: Templates (Complete List)

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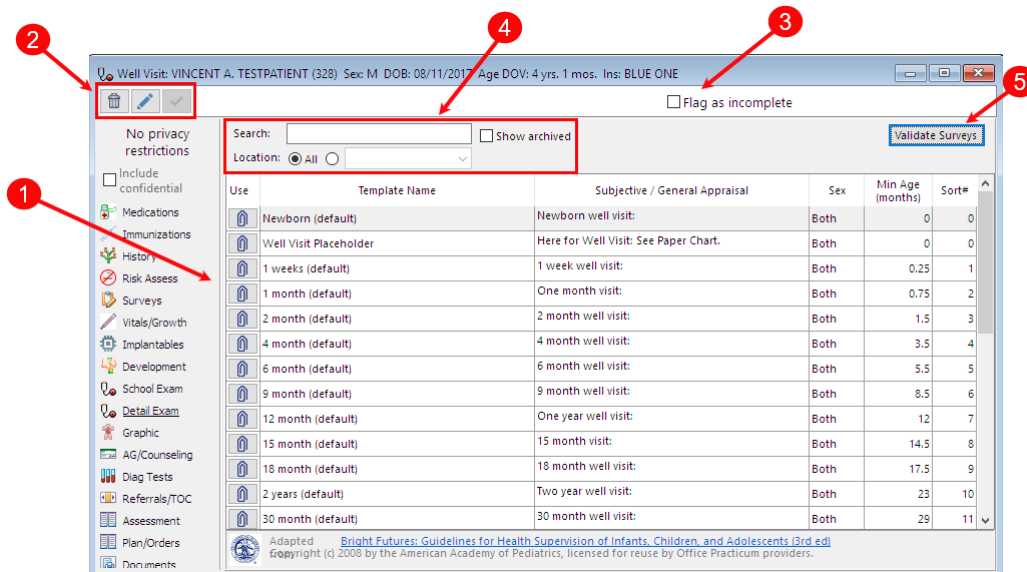


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Well Visit: Templates (Complete List)

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

The Complete List button displays the templates that are created, edited, and reviewed in the Well Visit Template Editor. Templates are pre-written scenarios you can use in a Well Visit to document common pediatric diagnoses. These templates are based on the Bright Futures Guidelines and contain Bright Futures Anticipatory Guidance, Developmental Milestones, Pre-Visit Surveys, Developmental Surveys, Patient/Parent Educational Handouts, and other items following Bright Futures recommendations.



Well Visit: Templates (Complete List)

Number	Section	Description
1	Templates grid	The Templates grid lists the templates that are created, edited, and reviewed in the Well Visit Templates Editor. Double-clicking the template name opens the Apply Template Dialog to apply the template notes to the current Well Visit.
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	The Flag as Incomplete checkbox marks a Well Visit Note as unfinished.
		The Search Criteria fields are used to narrow the templates inside the template grid. The

4	Search Criteria	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	Validate Surveys button	The Validate Surveys button is used to perform validation on CHADIS survey tasks in templates to ensure the Surveys are linked correctly by name.
