

# Well Visit: Plan/Orders

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Version 20.14

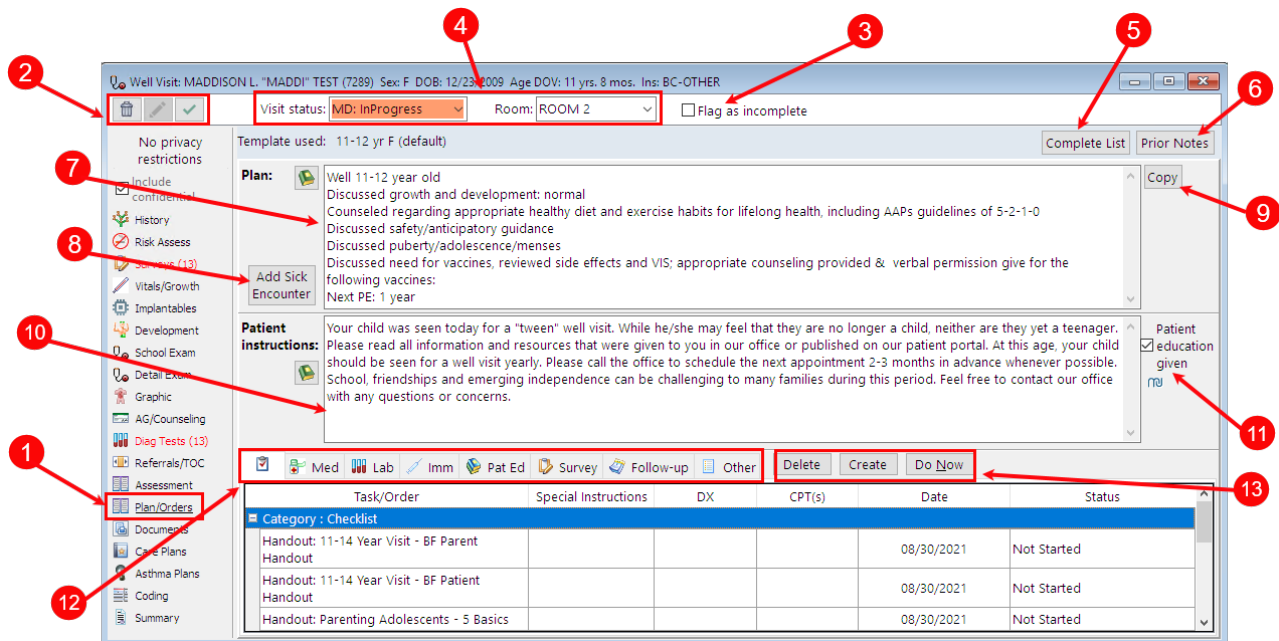


This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

## About Well Visit: Plan/Orders


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

The Plan/Orders window in a Well Visit adds/modifies the Plan and Patient Instructions for the visit, and allows for orders to be created. It includes the Order Worksheet, allowing you to place orders for labs, medications, patient education, surveys, and follow-up visits.



## Well Visit: Plan/Orders Map

Number	Section	Description
1	Plan/Orders button	The Plan/Orders button opens the Plan/Orders window in the patient's Well Visit Note.
2	Note Function buttons	The Note 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 the Well Visit Note as unfinished.
4	Visit Status and Room drop-downs	The <b>Visit Status</b> and <b>Room</b> drop-down menus allow the user to select the appropriate status and location of the patient. These selections update the Tracking and Calendar windows.

5	Complete List button	The <b>Complete List</b> button provides a complete list of Well Visit Templates.
6	Prior Notes button	The <b>Prior Notes</b> button views prior notes and messages for the selected patient.
7	Plan section	The Plan section text box provides notes on the plan (solution) and patient instructions. The notes in this text box populate based upon the template chosen. A <b>Phrase Construction</b> button is available in this section so that you can easily add additional documentation.
8	Add Sick Encounter button	The <b>Add Sick Encounter</b> button creates or opens an Encounter Note in the patient's chart.
9	Copy button	The <b>Copy</b> button copies the text in the Plan notes and pastes them in the Patient Instructions section of the window.
10	Patient Instructions	The Patient Instruction section is used to provide patient-specific directives and a summary of the visit. The notes in this text box populate based upon the template chosen. A <b>Phrase Construction</b> button is available in this section so that you can easily add additional documentation.
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 for the visit.
12	Order tabs	<p>The Order tabs are used to assign 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 in the Orders window. Below is a description of what each tab is used for from left to right.</p>  <ul style="list-style-type: none"> <li>• <b>Order Worksheet Summary:</b> Displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status.</li> <li>• <b>Med:</b> Allows you to create, add, refill, print, send and review prescriptions.</li> <li>• <b>Lab:</b> Allows you to where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition.</li> <li>• <b>Imm:</b> Allows you to create and modify tasks for immunizations. Clicking the icon accesses the patient's immunization chart. Recommended vaccines are indicated at the bottom of the Order Worksheet.</li> <li>• <b>Pat Education:</b> Allows you to create, modify, and view resource/handout orders.</li> <li>• <b>Survey:</b> Allows you to create, modify, and administer surveys from this location. Clicking the Do Now button opens the Survey window.</li> <li>• <b>Follow-Up:</b> Allows you to create and modify follow-up orders, and select to schedule a follow-up from this location. Clicking the Do Now button opens the Schedule window.</li> <li>• <b>Other:</b> This is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks. Clicking the Add Referral Letter button opens the <b>Referral/Care Transaction Details</b> window.</li> </ul>
13	Delete, Create and Do Now buttons	<ul style="list-style-type: none"> <li>• The <b>Delete</b> button detaches/removes the highlighted order.</li> <li>• The <b>Do Now</b> button performs the selected task.</li> <li>• The <b>Create</b> button creates a checklist of tasks for the current tab.</li> </ul>

Version 20.13

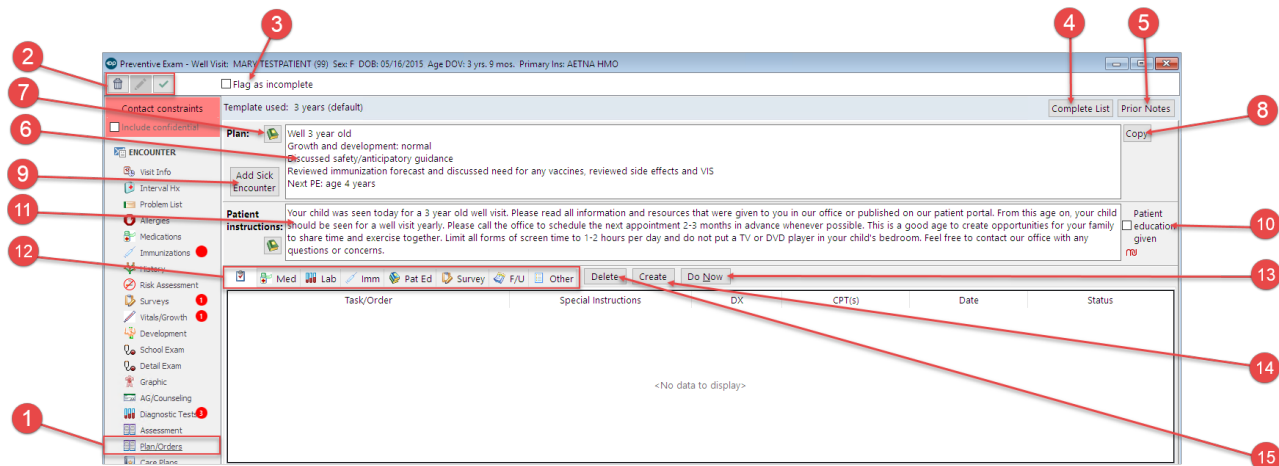


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## About Preventive Exam: Plan/Orders









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

The Plan/Orders window in a Well Visit adds/modifies the Plan and Patient Instructions for the visit, and allows for orders to be created. It includes the Order Worksheet, allowing you to place orders for labs, medications, patient education, surveys, and follow-up visits.



## Preventive Exam: Plan/Orders Map

Number	Section	Description
1	Plan/Orders button	The Plan/Orders button opens the Plan/Orders window in the patient's well visit note.
2	Encounter Function buttons	The Function buttons delete an entire encounter note, edit an well visit note, or save an well visit note.
3	Flag as Incomplete checkbox	The Flag as Incomplete checkbox will mark an preventive exam as unfinished.
4	Complete List button	The Complete List button provides a complete list of preventive exam templates.
5	Prior Notes button	The Prior Notes button views prior notes and messages for the selected patient.
6	Plan panel	The Plan panel text box provide notes to the plan (solution) and patient instructions. The notes in this text box will appear based upon the template chosen.
7	Phrase Construction button	The Phrase Construction button opens the <a href="#">Phrase Construction</a> window. Phrase Construction assists with the creation of notes and other text-based descriptions.
8	Copy button	The Copy button copies the text in the plan notes and pastes the notes in the patient instructions text box.
9	Add Sick Encounter button	The Add Sick Encounter button creates or opens an encounter not in the patient's chart.
10	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.
11	Patient Instruction	The Patient Instruction are used to provide notes inside the Plan or Patient Instruction text box. The notes in this text box will appear based upon the template chosen.

12	Order Worksheet	<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 <b>Order Worksheet Summary tab</b> displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status.</li> <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>
13	Do Now button	The Do Now button performs the selected task.
14	Create button	The Create button creates a checklist of tasks for the current tab.
15	Delete button	The Delete button deletes a selected task for the current tab.