# Document the Physical Exam

Last Modified on 02/05/2021 4:06 pm EST

Version 20.11

## Overview

The sections below instruct on how to enter physical exam information. The Detailed Exam is entered during either an Encounter or a Well Visit, and the Narrative Exam is entered only during an Encounter.

## Document a Detailed Exam (Encounter or Well Visit)

1. From within an open Visit Note, click **Detail Exam** in the Window Navigation panel.
2. Add an exam template using one of the following methods:

   - Click the drop-down arrow in the **All templates:** field and select from the list.
   - Click into the **All templates:** field, enter the name of the template, and select from the list.

3. Click **OK** in the Apply Template Dialog box.

> **Note**: By default, the template name is used as a header in the Plan and Instructions sections of the Encounter Summary. This can be disabled by deselecting the checkbox to **show template name as header to plan and patient instructions** located under **Admin tab > Global Preferences > Special tab > Medical tab**

4. Change the Examination Point findings by clicking in the **NL / ABNL** column for each point.
5. To add additional examination questions do one of the following:

   - To view additional examination points, click the group heading.
   - To view additional exam groups, click the checkbox **Show all groups**.



6. To add an Examination Point that is not included, complete the following steps:

   a. Click the **Custom question** drop-down, and select the **Exam Group**.
   b. Type the **question** in the blank field.
   c. Click the **Add** button to save the entry.

| | NL / ABNL | Examination Point | Findings |
|---|---|---|---|
| | NL | conjunctivae & lids: pink & moist | |
| **Ears, Nose, Mouth, Throat** | | | |
| | NL | canals & TMs (otoscopic exam): clear with normal landmarks & light reflex | |
| | ABNL | nares (nasal mucosa, septum and turbinates) | clear discharge, no flare |
| | NL | oropharynx: moist mucous membranes, without pharyngeal erythema or intraoral lesions | |
| **Neck** | | | |
| | NL | neck: supple, trachea midline, no masses or significant adenopathy | |
| | NL | without meningeal signs | |
| **Respiratory** | | | |
| | NL | | mild inspiratory stridor with cry/agitation, but no retractions, no tachypnea or distress |
| | ABNL | | good air exchange bilaterally with clear & equal breath sounds, no rales, rhonchi or wheeze, + hoarse voice |
| **Cardiovascul** | | | |
| | NL | ondisplaced | |
| | NL | ular rate & rhythm, no murmur | |
| **Skin** | | | |
| | NL | utaneous tissue) | no cyanosis/pallor/rashes/viral stigmata |

Custom question: [            ▼] [          ] [Add]

Dropdown list shown:
Constitutional
Eyes
Ears, Nose, Mouth, Throat
Neck
Respiratory
Cardiovascular
Chest (Breasts)
Gastrointestinal
Genitourinary
Hematologic/Lymphatic/Immunol
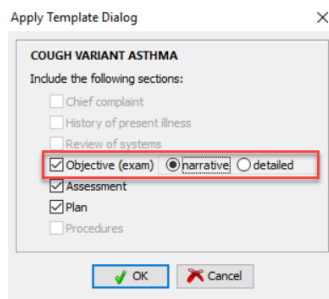
☐ Show all groups

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📌 **Note**: You can also copy and paste the findings of an entire system group into a new note. This is especially useful when you'd like your documentation to be the same in both notes, such as a Well Visit, and an Encounter or when you're seeing siblings with the same conditions, where the findings are duplicated. To do this:

1. Right-click on the System Group.
2. Select **Copy Group**.
3. In the new note, navigate to the Detailed Exam.
4. Right-click and **Paste Group** into the new note.

## Document a Narrative Exam (Encounter Only)

1. From within the open Encounter Note, click **Narr Exam** in the Window Navigation panel.
2. Add an exam template using one of the below methods:

   - Click the drop-down arrow in the **All templates:** field and select from the list.
   - Click into the **All templates:** field. Begin type the name of the template and select from the list.

3. The Apply Template Dialog box is displayed. Click the **narrative** radio button for the Objective (exam).



4. Click the **OK** button, the Narrative Exam window is displayed.
5. To change or add findings in a narrative field, use one of the following methods:

   - Click into the text field and type additional exam findings.
   - Click into the text field, select the **Phrase Construction** button and insert phrases.
   - Click the **Def** button to insert the default phrase.

Version 20.10

## Overview

The sections below instruct on how to enter physical exam information. The Detailed Exam is entered during either an Encounter

or a Well Visit, and the Narrative Exam is entered only during an Encounter.

## Document a Detailed Exam (Encounter or Well Visit)

1. From within an open Visit Note, click **Detail Exam** in the Window Navigation panel.
2. Add an exam template using one of the following methods:

   - Click the drop-down arrow in the **All templates:** field and select from the list.
   - Click into the **All templates:** field, enter the name of the template, and select from the list.

3. Click **OK** in the Apply Template Dialog box.
4. Change the Examination Point findings by clicking in the **NL / ABNL** column for each point.
5. To add additional examination questions do one of the following:

   - To view additional examination points, click the group heading.
   - To view additional exam groups, click the checkbox **Show all groups**.

| NL / ABNL | Examination Point | Findings |
|---|---|---|
| **☐ Show all groups** | | |
| | **⊟ Ears, Nose, Mouth, Throat** | |
| N/A | Findings: | |
| N/A | external ears & nose | |
| NL | canals & TMs (otoscopic exam): clear with normal landmarks & light reflex | |
| N/A | gross assessment of hearing: responds to voice | |
| ABNL | nares (nasal mucosa, septum and turbinates) | clear discharge, no flare |
| N/A | lips, teeth and gums | |
| NL | oropharynx: moist mucous membranes, without pharyngeal erythema or intraoral lesions | |

6. To add an Examination Point that is not included, complete the following steps:

   a. Click the **Custom question** drop-down, and select the **Exam Group**.
   b. Type the **question** in the blank field.
   c. Click the **Add** button to save the entry.

| NL / ABNL | Examination Point | Findings |
|---|---|---|
| **☐ Show all groups** | | |
| NL | conjunctivae & lids: pink & moist | |
| | **⊟ Ears, Nose, Mouth, Throat** | |
| NL | canals & TMs (otoscopic exam): clear with normal landmarks & light reflex | |
| ABNL | nares (nasal mucosa, septum and turbinates) | clear discharge, no flare |
| NL | oropharynx: moist mucous membranes, without pharyngeal erythema or intraoral lesions | |
| | **⊟ Neck** | |
| NL | neck: supple, trachea midline, no masses or significant adenopathy | |
| NL | without meningeal signs | |
| | **⊟ Respiratory** | Constitutional |
| NL | | Eyes · mild inspiratory stridor with cry/agitation, but no retractions, no tachypnea or distress |
| | | Ears, Nose, Mouth, Throat |
| ABNL | | Neck · good air exchange bilaterally with clear & equal breath sounds, no rales, rhonchi or wheeze, + hoarse voice |
| | **⊟ Cardiovascu** | Respiratory |
| NL | | Cardiovascular ondisplaced |
| NL | | Chest (Breasts) ular rate & rhythm, no murmur |
| | ▶ **⊟ Skin** | Gastrointestinal |
| | | Genitourinary |
| NL | | utaneous tissue) · no cyanosis/pallor/rashes/viral stigmata |
| | | Hematologic/Lymphatic/Immunol |
| Custom question: [          ▼] | | [Add] |

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📌 **Note**: You can also copy and paste the findings of an entire system group into a new note. This is especially useful when you'd like your documentation to be the same in both notes, such as a Well Visit, and an Encounter or when you're seeing siblings with the same conditions, where the findings are duplicated. To do this:
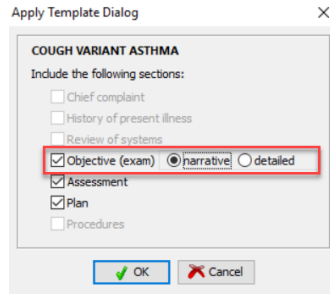
1. Right-click on the System Group.
2. Select **Copy Group**.
3. In the new note, navigate to the Detailed Exam.
4. Right-click and **Paste Group** into the new note.

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## Document a Narrative Exam (Encounter Only)

1. From within the open Encounter Note, click **Narr Exam** in the Window Navigation panel.

2. Add an exam template using one of the below methods:

   - Click the drop-down arrow in the **All templates:** field and select from the list.
   - Click into the **All templates:** field. Begin type the name of the template and select from the list.

3. The Apply Template Dialog box is displayed. Click the **narrative** radio button for the Objective (exam).



4. Click the **OK** button, the Narrative Exam window is displayed.
5. To change or add findings in a narrative field, use one of the following methods:

   - Click into the text field and type additional exam findings.
   - Click into the text field, select the **Phrase Construction** button and insert phrases.
   - Click the **Def** button to insert the default phrase.