Behavioral Health Template Package

Last Modified on 08/03/2022 8:11 am EDT

> ⚠ **Warning**: Before importing Templates into OP, read the guidelines/warnings for template sharing in **Warnings: Before You Share Templates**.

The template packages below can only be imported if you are running OP 20.15 or higher.

About

The Behavioral Health Template Packages below each contain a set of templates meant to provide Providers a framework for different Behavioral Health Visits. They include a combination of additional HPI, ROS, Counseling, and Plan sections, where applicable.

Once imported, the templates from the downloaded package will be listed in Encounter Templates under **System: TEMPLATES TO RELEASE.** Complete the following steps for each template your Practice intends to use

1. Navigate to the Encounter Template Editor: **Clinical tab > Encounter Templates**.
2. Click **+** to expand **System: TEMPLATES TO RELEASE**
3. Select the template to review and click the **Edit** button.
4. Make the following edits:

   - Clear the **Author** field from displaying $FX by clicking the **Clear** button.
   - *(If applicable)* Change the **Visibility** setting from **Any staff member** to a different visibility option for the template.
   - *(If applicable)* Change the **Finalize Status** selection from **Providers only** to another option. The default of Providers only was selected because there are parts of Visits and Visit Notes that should only be finalized by Providers who perform visits.
   - Add the Diagnosis Code that should be included in the template in the Diagnoses section of the Encounter Note tab.
     a. In the Diagnoses section of the Encounter Note tab, click into the ICD-10 code field and click the **Search** button. The ICD-10 code is displayed.
     b. Search for and select the Diagnosis Code(s) to add to the template.
     c. Click the **Save** button in the Diagnoses section.
     d. Click the **Save** button at the top of the template window.

If there are templates that your Practice will not use after importing the package, follow the instructions **here** to delete or archive them.

(03/22) Template Package	(07/22) Template Package

⬇ Click **here to download** the 03/22 Behavioral Health Template Package which includes **all** of the following:

Symptom Templates
- ADHD follow-up (03/22) [preview]
- ADHD initial eval (03/22) [preview]
- Mood / behavior concerns (03/22) [preview]
- Suicidal ideation (03/22) [preview]

Diagnosis Templates
- ADHD INITIAL EVALUATION (03/22) [preview]
- ADHD MAINTENANCE (03/22) [preview]
- ANXIETY FOLLOW-UP (03/22) [preview]
- ANXIETY INITIAL (03/22) [preview]
- AUTISM INITIAL (03/22) [preview]
- CONDUCT DISORDER (03/22) [preview]
- DEPRESSION FOLLOW-UP (03/22) [preview]
- DEPRESSION INITIAL (03/22) [preview]
- EATING DISORDER (03/22) [preview]
- GENDER DYSPHORIA (03/22) [preview]
- GRIEF DISORDER (03/22) [preview]: The code for Prolonged Grief Disorder F43.8 is a new DSM category. This ICD-10 code is currently not in OP and will need to be added to your Diagnosis Codes and added to the template. If you need information on how to add a Diagnosis code refer to **click here**.
- OCD (03/22) [preview]
- ODD (03/22) [preview]
- TIC DISORDER (03/22) [preview]

⬇ Click **here to download** the 07/22 Behavioral Health Template Package which includes **all** of the following:

Symptom Templates
- Eating concerns (07/22) [preview]

Diagnosis Templates
- SELECTIVE MUTISM (07/22) [preview]
- SEPARATION ANXIETY DISORDER (07/22) [preview]
- SOCIAL ANXIETY DISORDER (07/22) [preview]
- SPECIFIC LEARNING DISORDER (07/22) [preview]
- STUTTERING (07/22) [preview]
- TRICHOTILLOMANIA (07/22) [preview]

Instructions to Download Shared Templates

Client-Server Steps to Download Shared Templates

1. On the template-download page, click on the hyperlinked template name to download the template file.

📌 **Note**: The downloading procedure varies depending on your browser. If you are uncertain on downloading in your specific browser, please contact the practice's IT staff for assistance.

2. Save the file to your computer.

💡 **Tip:** So that users can easily locate saved files, it is recommended to create folders specific to the type of files being downloaded.

3. Ensure the template files you downloaded are in the folder.

Cloud Steps to Download Shared Templates

1. Create a folder under **Network > tsclient > \\tsclient\C** where you will save the downloaded file.
2. On the template-download page, click on the hyperlinked template name to download the template file.
3. Navigate to the **Network** drive in the Save As window.
4. Double-click **tsclient**.
5. Double-click the **\\tsclient\C Share** or your local folder.

6. Select the folder you created in step 1.
7. Click **Save**.
8. Ensure the template files you downloaded are in the folder.

> **Note**: Once you have downloaded the files, they are ready to be imported into OP. For an overview of the Import and Export functionality in OP, refer to the article below that matches your OP environment:
> - **Import or Export Templates (Client Server)**
> - **Import or Export Templates (Cloud)**
>
> Regardless of which type of environment you are in, you must review and customize each template you download and import for your Practice. For details, refer to **Customizing Shared Templates**.