

# Add, Edit, or Retire Encounter Questions

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**Path: Clinical tab > More button (Customize group) > Encounter Questions button**

## About


Encounter Questions are displayed in the following Groups: Exam, ROS, History, HPI, Plan, Development, and Anticipatory Guidelines. Exam, ROS, and History can be customized or retired. Anything edited in these sections will be available to use in the Well Visit and Encounter templates.

## Add, Edit, or Retire a System

### Add a System

1. Navigate to the Encounter Questions window following the path above.
2. From the Groups drop-down, choose a Group.
3. Click the **Add**  button located in the top section of the window. A blank line is displayed.
4. Complete all of the fields for the new System. The Sort Order and OP ID are automatically populated once you save.
5. Click the **Save**  button.
6. *(Optional)* Use the up/down arrows to move the System up or down.

### Edit a System

1. Navigate to the Encounter Questions window: **Clinical tab > More button (Customize group) > Encounter Questions button**.
2. From the Groups drop-down, select the Group that includes the System you want to edit.
3. Click the **Edit**  button located in the top section of the window.
4. Make the necessary edits to the description, sort order, section, and/or exam type.
5. Click the **Save** button.
6. *(Optional)* Use the up/down arrows to move the System up or down.

### Retire a System

1. Navigate to the Encounter Questions window: **Clinical tab > More button (Customize group) > Encounter Questions button**.
2. From the Groups drop-down, select the Group that includes the System you want to retire.
3. Click to select the System located in the top section of the window.
4. Click the **Edit** button located in the top section of the window.
5. Select the checkbox in the Retired column.
6. Click the **Save** button. The Audit Trail for Enc Builder Question window is displayed.
7. Select a reason and click **OK**.

## Add, Edit, or Retire a Question

### Add a Question

1. Navigate to the Encounter Questions window: **Clinical tab > More button (Customize group) > Encounter Questions button**.
2. From the Groups drop-down, choose a Group.
3. Click the **Add** button located in the bottom section of the window, a blank line is displayed.

4. Complete all the fields for the new Question. The Local ID is automatically populated.
5. Click the **Save** button.
6. *(Optional)* Use the up/down arrows to move the question up or down.

## Edit a Question

1. Navigate to the Encounter Questions window: **Clinical tab > More button (Customize group) > Encounter Questions button.**
2. From the Group drop-down, choose a Group.
3. Click to select the Question, and click the **Edit** button located at the bottom section of the window.
4. Make your edits to the description, sort order, scope, sex, etc.
5. Click the **Save** button. The Audit Trail for Enc Builder Question window is displayed.
6. Select a reason for the change, and click **OK**.
7. *(Optional)* Use the up/down arrows to move the question up or down.



**Note:** You may edit the Social History Questions if the edit doesn't change the meaning of the question. If changing the meaning of the question, it's recommended to add a new question.

## Retire or Delete an Encounter Question

You may delete a recently added question **only if it hasn't been used**. If you need to delete a question that has been used, follow the steps below to retire an Encounter Question.

1. Navigate to the Encounter Questions window: **Clinical tab > More button (Customize group) > Encounter Questions button.**
2. From the Group drop-down, choose a Group.
3. Click to select the Question to retire located at the bottom section of the window.
4. Click the **Retire** button. The Audit Trail for Enc Builder Question window is displayed.
5. Select a reason, and click **OK**.

## Additional Actions

- **Refresh:** Allows you to refresh any changes made to the Encounter Groups or Questions.
- **Import:** Allows you to import questions to the Encounter Questions.
- **Export:** Allows you to export a particular set of Encounter Questions and/or Groups.
- **Clean-Up:** Allows you to clean up (delete) any Encounter Group(s)/Question(s) that are duplicated and that have not been used in any templates. This is irreversible.