

Chapter 8

Customizing Templates & Pop-Up Text

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 - Letters Templates
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1. Overview



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➤ Order Templates

- ❖ Physician orders created for the most common lab, imaging, and medical tests

2. Creating Templates



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➤ Office Visits Templates

- ❖ Insert the title for the template in *Template Name* field
- ❖ Complete OV template as if performing an office visit note
- ❖ Vitals are added during the time of the patient's actual visit
- ❖ Template can be created by saving an *existing* office visit note

Office Visit Template

Template Name: Allergic Rhinitis

No Patient Selected

Present Illness Date: 07/22/2009 last mod: 07/22/2009

S Panel

CC

PI

ROS

Exam

Dx

Rx

Test

Proc

Other Tx

F/U-Rem

Follow-Up.

Pt reports symptoms began suddenly

Pt reports symptoms began gradually

1

2

3

4

5

6

1/2

day(s) ago

month(s) ago

year(s) ago

hour(s) ago

minute(s) ago

and has been constant since onset

Copy

Prev

Note

Copy

Previous

Notes

init

Save

Cancel

Delete

Office Visit Template

Subjective:

Chief Complaint:

Present Illness: Pt c/o red, itchy eyes, congested, itchy and runny nose (clear fluid), post. nasal drip, sneezing, itchy ears, scratchy throat and occasional cough for the past _ weeks.

Experiences these Sx:

At this time every year. / All the time.

Has used _ in past with varied degrees of benefit.

Aggravated by _

PMHx:

- for asthma.

FMHx:

Present Illness

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Experiences these Sx:

At this time every year. / All the time.

3. Creating Templates

➤ Order Templates

- ❖ Created to provide rapid documentation for the ordering of tests
- ❖ If templates used in the OV screen the Dx and tests will be automatically added from the OV note
- ❖ *PopUp Text* can be used and patient's insurance added. Can be printed and/or charted

The image displays two side-by-side screenshots of the 'Orders Template' dialog box. The left window shows a blank template named 'New Orders Template'. The right window shows a populated template named 'Mild Cognitive Impairment' with the following content:

Template Name: Mild Cognitive Impairment

Dx: Memory Loss

Orders:

Labs:
CBC w/diff
Complete Metabolic Panel
T4, TSH
ESR
B12, Folate
RPR, HIV
UA
Urine Drug Screen
Urine for Heavy Metals

Imaging:
CXR
CT Head with/without Contrast

At the bottom of each window are buttons for Save, Cancel, Delete, and a printer icon.

4. Creating Templates

➤ Letter Templates

- ❖ Name of template typed in the *Template Name* field,
- ❖ Subject of the letter in the *Re:* field and *Text* or body portion added
- ❖ Name, address, greeting, and close will be populated by SC

The screenshot shows a 'Letter Template' dialog box with the following fields and content:

- Template Name:** No Show Letter To Patient
- To:** (empty text box)
- Addr:** (empty text box)
- Re:** No Show
- Greet:** (empty text box)
- Text:** This letter is to let you know that you missed your scheduled appointment with our office today. Please contact us if you wish to reschedule a new date and time.
- Close:** (empty text box)
- Encl:** (empty text box)

At the bottom of the dialog box are four buttons: Save, Cancel, Delete, and a button with a printer icon. Red arrows point to the Template Name, To, Addr, Re, Greet, Text, and Close fields.

5. Customizing Pop-Up Text

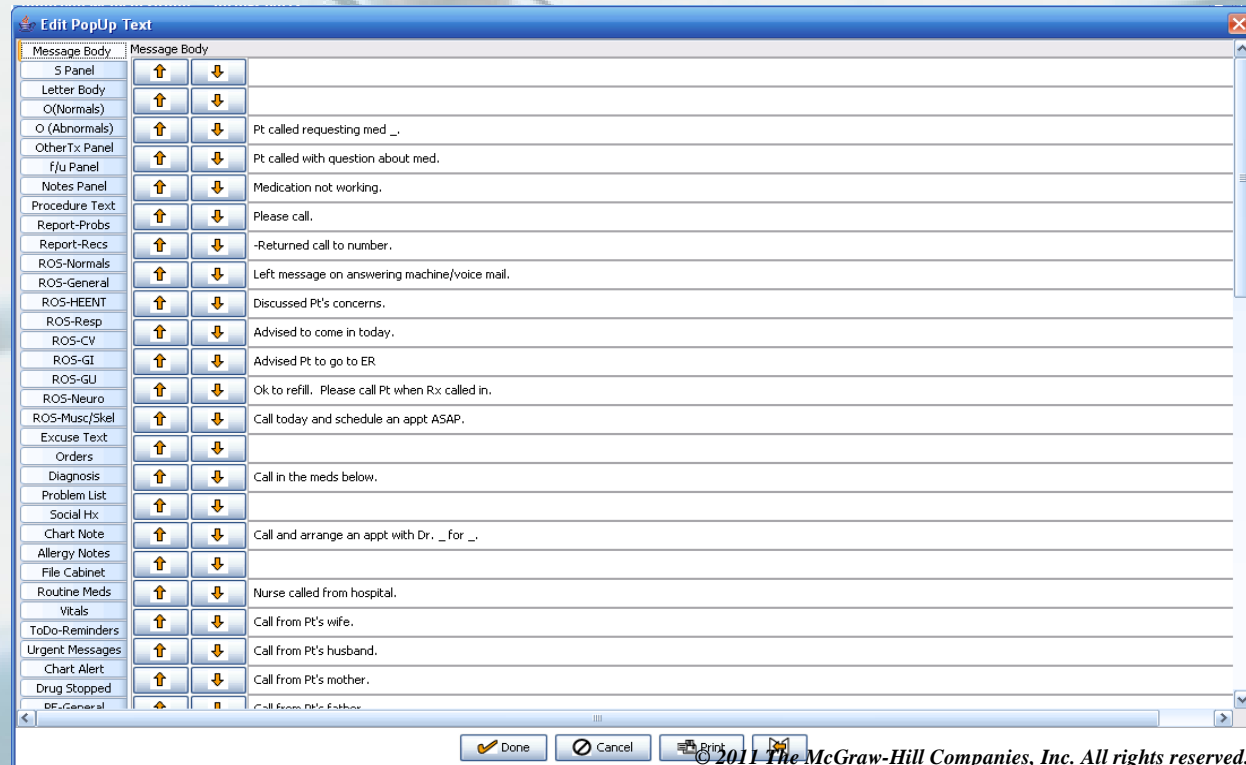


5. Customizing Pop-Up Text

- ❖ Accessed under the *File* menu and selecting *Preferences > PopUp Text*
- ❖ Sixty line items available in each popup text category
- ❖ Each line item can be individual words, sentences, or complete paragraphs
- ❖ Twenty customizable categories can be added

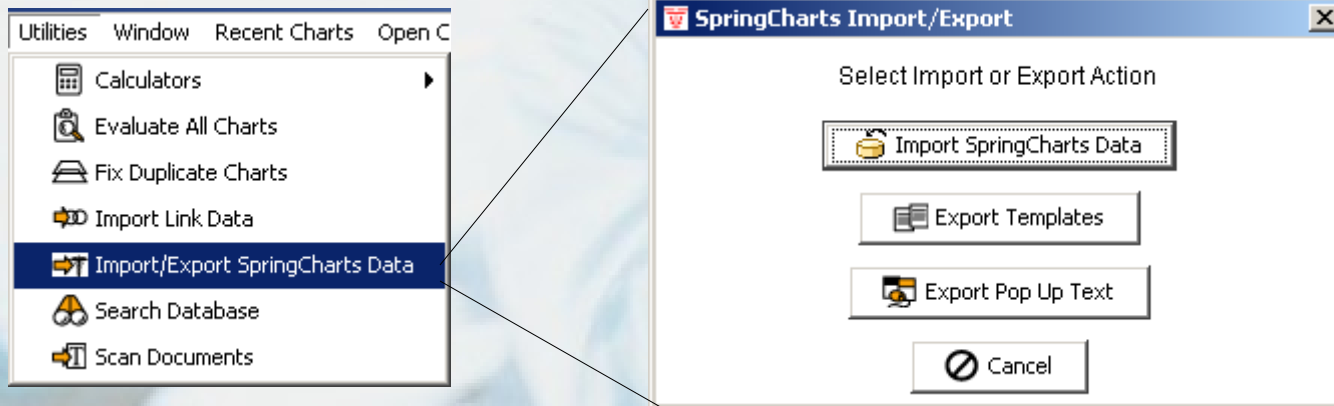
❖ Use “up” and “down” arrows to manipulate text by priority, topic, alphabetic, etc.

❖ PopUp Text is user-defined but it can be exported from one user and imported to another



6. Export/Import Pop-Up Text

- ❖ Pop-up text is user-defined – each user has his/her own set of text
- ❖ Pop-up text can be exported from one user and imported under another user's name
- ❖ When Pop-up text is imported it will override any existing pop-up text that the user may have already created



- ❖ Pop-up text is imported under the *Utilities* menu in the *Practice View* screen and then by choosing *Import/Export SpringCharts Data*