

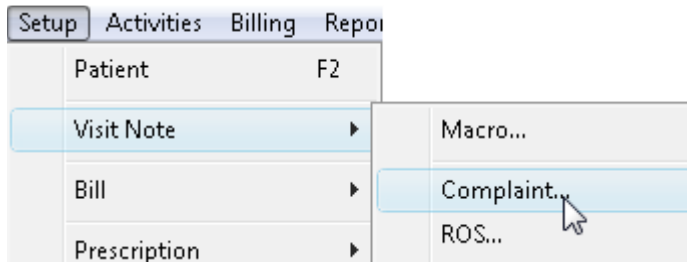
Visit Note Documentation & Customization

Objective & Goal:

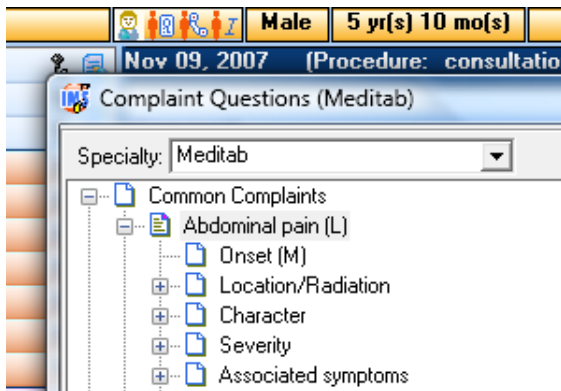
- Editing the Visit Note Documentation Tree
- Review creating new items
- Copy levels and sub-levels

DETAILS:

To edit Visit Note templates, go to Setup, then Visit Note.



Click on the section of the Visit Note you want to edit.



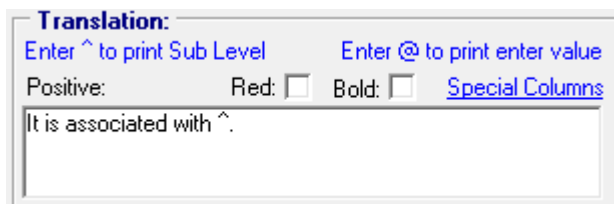
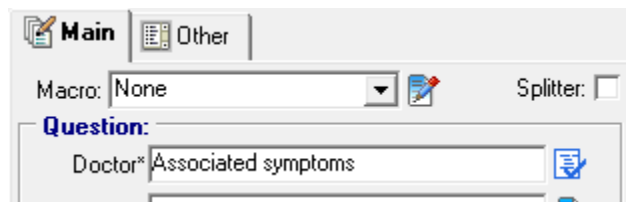
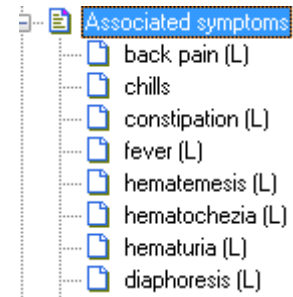
Template editor screen appears with a list of complaints in the Common Complaints section.

NOTES:



Edit contents for Associated Symptoms.

Enter Title of template in Doctor Question



Enter preferred statement in Positive value box.



Enter carrot sign “^” to print another sublevel.

Enter @ to print enter value – will allow user to enter a value or sub-level.

Red & Bold -- will make the text Red in color and Bold font

Special Columns – Provides a list such as Last Name, First Name, Full Name, Age, Race, He/She, he/she, His/Her, his/her, Him/Her, him/her, Mr/Ms

Enter Value – allows user to choose a Character, Numeric, Date, List, Calculate, Image, Referring Provider, Referring Specialty, Lab, Insurance, Hospital, Pharmacy, Employer, Vitals, Day, Week, Month, Year, Modality

Required – checked will require attention

NOTES:



Show Negative – will include the negative statement option. Type preferred statement in Negative value box.

Sub Level Response: Yes/No or Positive/Negative response possibility

Choose option for multi selection.

Select desired conjunction for multi selection option.

Select desired text to show before Negative selection.

Format - Template or Grid screen choice.

Check required sublevel if desired.

Copy allows user to copy and modify for new choice/template. Selection Options to copy window appears allowing various choices: enter value, enter type, value required, deselect all other options when this option selections,.....please see list. **Copy to Same Level or Next Sub Level**

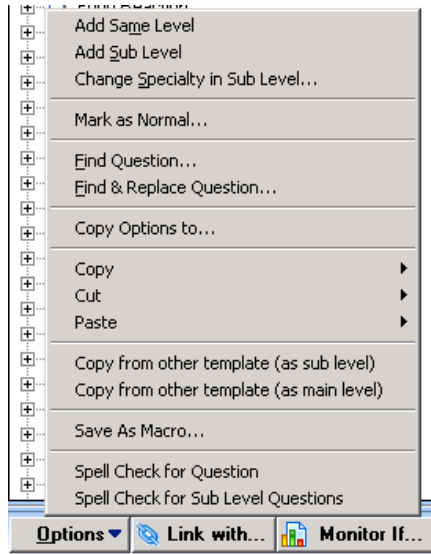
NOTES:



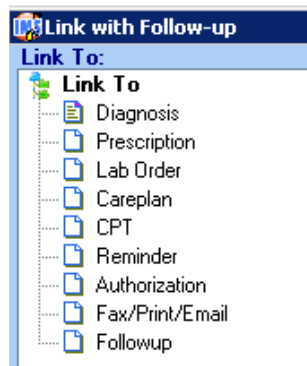
Bottom Buttons:



Options – allows user to make the various choices as shown below.

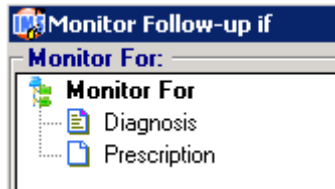


Link with.... Allows user to link various items to the item chosen.



NOTES:

Monitor if...



Add -- allows user to add items to Same Level or Sub-level

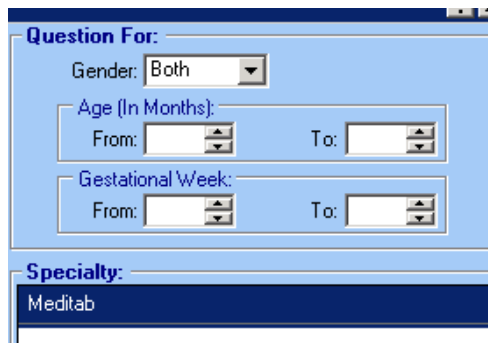
Delete -- allows user to delete highlighted item

Cancel – allows user to cancel rather than Saving changes

Save - allows user to save new or changed.

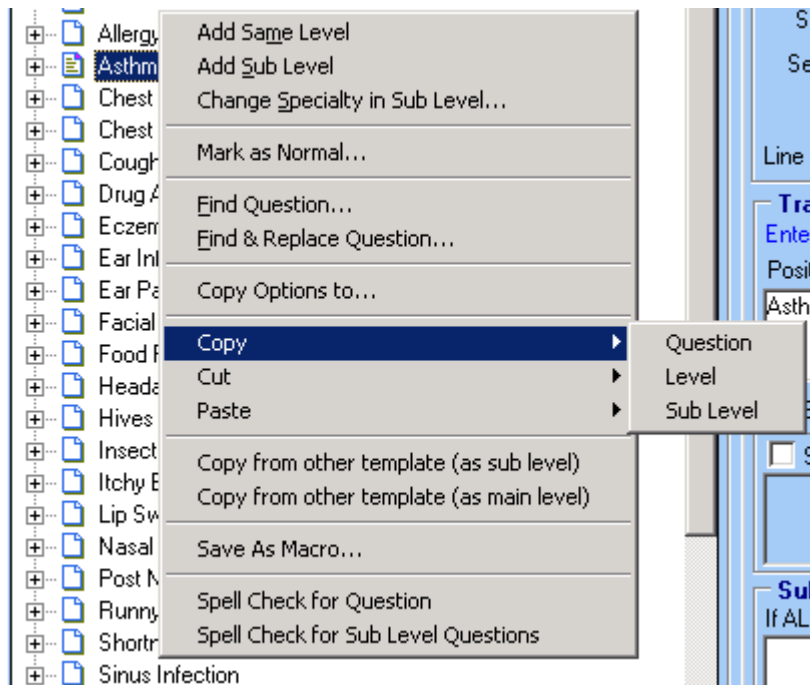
Close - closes window

Question For: allows user to special gender, age range, etc.



NOTES:

Copy from left panel list - allows user the same selections as Options, including copy question, level, and sub-level.



NOTES:
