A very brief HPI template has been created to assist in triage of patients with upper respiratory symptoms. It can be imported to a visit note or a virtual visit using the same workflow used to import any template.

To import it into a visit note, click on the template button at the bottom of an open visit.

Search for the template using the category filter “All” in generic templates. After typing in “COVID”, click on the “Go” button, and your screen should look like the one shown here to the right.

Make sure “HPI” is selected in the right panel – don’t worry if other areas are selected, as there is nothing else in this template but the HPI.

Click on “Merge Template”.

If you want to make it easier to find this template in the future, click “Add As Favorite” now.

After closing out of the template screen, the new COVID-19 questionnaire can be accessed in the HPI for this visit.
Clicking on “COVID-19” (the green text surrounded by a red rectangle in the previous screenshot) opens the view shown below. Hovering over the text in the left panel allows the user to see the entire question. Clicking on the dropdown menu in the middle panel allows the user to change from the default answer of “No” to “Yes”. Additional notes can be entered by clicking on the blank “Notes” area in the right panel.

Clicking on one of the questions, as shown in the screen to the right...

...opens the screen shown to the left. The questionnaire can be completed using either method.
To enter the COVID-19 template into a virtual visit of a telephone encounter, click on the “Progress Notes” button at the bottom of the TE.

This opens the telephone encounter in the progress notes tab, allowing the user to add a template.
Using the exact same workflow for adding a template to a face-to-face office visit, select the COVID-19 template and merge it into the virtual visit of the telephone encounter.

Complete the questionnaire either in the progress note section of the chart (the area in which the template was imported), or by going back to the telephone encounter and clicking on the “HPI” of the virtual visit. In my testing, clicking on the green “COVID19” heading or on the actual questions in the virtual visit did NOT open the questionnaire.