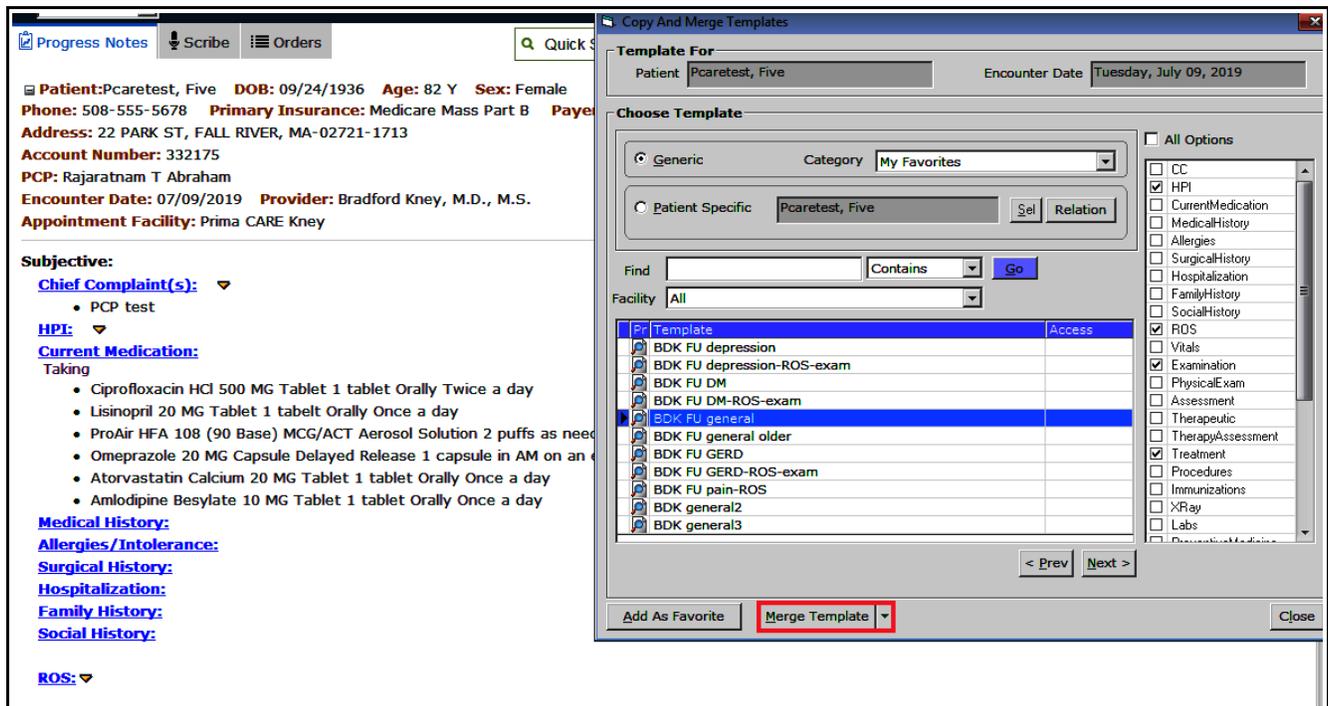


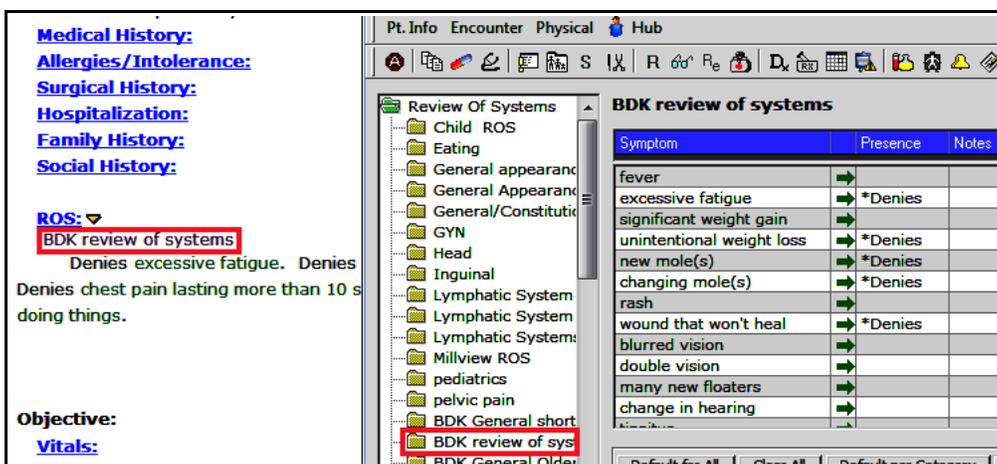
Saving a Note as a Template

To generate an entirely new template requires administrative privileges. BUT all users can create a new template from a note, or import an existing template into a blank note, modify it, and then save it as a new template. I think this function is quite powerful and user-friendly.

Start with a blank note – I prefer to use test patients to be sure I don't inadvertently mess something up in a real patient's chart.



In this test patient's chart, I merged my “BDK FU general” template into a blank note (I could have used “Copy Template” instead in this case, given that the note is mostly blank).



In this example, I am going to add a few more ROS questions from my existing template. The way this ROS template is set up, clicking on the blank “Presence” box next to a symptom once changes it to “Denies”, clicking it again changes it to “REPORTS”, and clicking it again returns it to blank.

BDK review of systems

Symptom	Presence	Notes
fever	→	
excessive fatigue	→ *Denies	
significant weight gain	→ *Denies	
unintentional weight loss	→ *Denies	
new mole(s)	→ *Denies	
changing mole(s)	→ *Denies	
rash	→ *Denies	
wound that won't heal	→ *Denies	
blurred vision	→ *Denies	
double vision	→	
many new floaters	→	
change in hearing	→ *Denies	

Default for All Clear All Default per Category Clear

Notes Browse ... Clear Spell Check

Here is the modified ROS. A few more symptoms have been added with the specification of “Denies”.

Choose Template

Generic Category: My Favorites

Patient Specific Pcaretest, Five Sel Relation

Find: Contains Go

Facility: All

Pr	Template	Access
	BDK ankle sprain	
	BDK anxiety	
	BDK AUA	
	BDK back pain	
	BDK Bipolar	
	BDK Bipolar Questionnaire	
	BDK Blank	
	BDK CAT	
	BDK chest pain	
	BDK depression	
	BDK diarrhea	

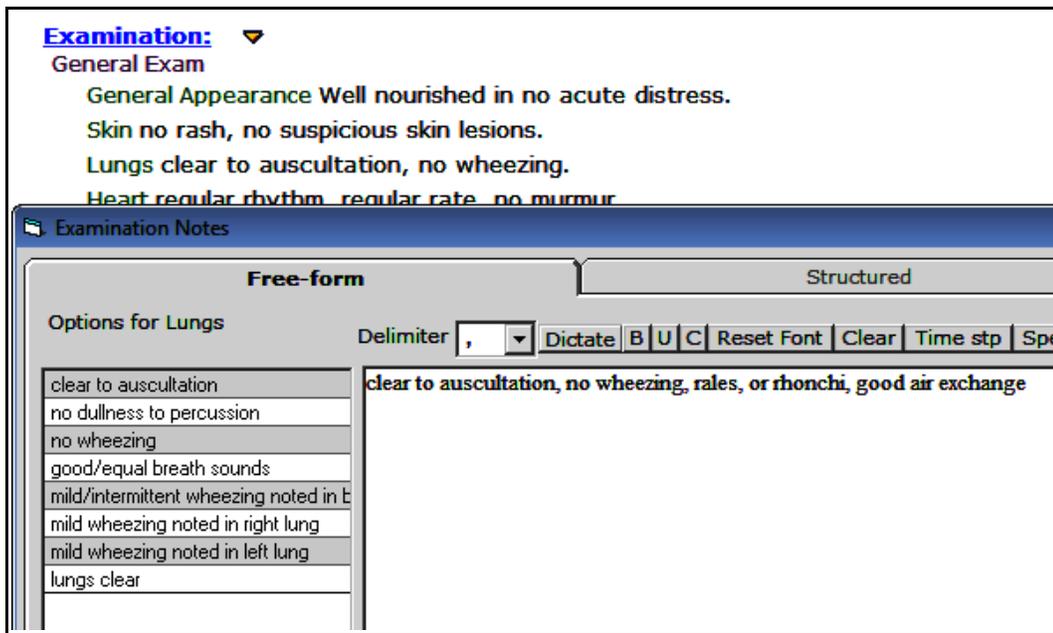
All Options

- CC
- HPI
- CurrentMedication
- MedicalHistory
- Allergies
- SurgicalHistory
- Hospitalization
- FamilyHistory
- SocialHistory
- ROS
- Vitals
- Examination
- PhysicalExam
- Assessment
- Therapeutic
- TherapyAssessment
- Treatment
- Procedures
- Immunizations
- XRay
- Labs
- PreventiveMedicine

< Prev Next >

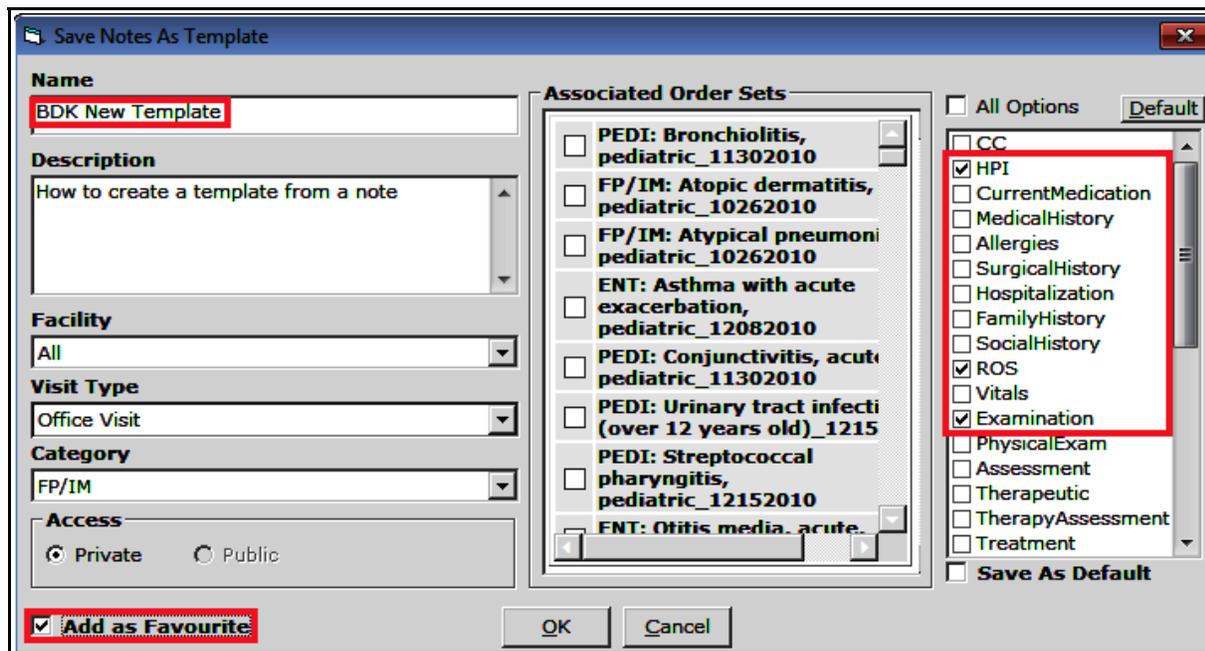
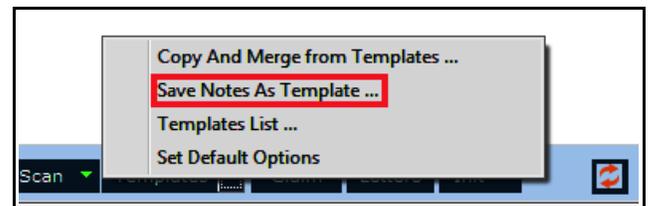
Add As Favorite Merge Template Close

In the screen above, the CAT questionnaire will be added to this template. This is set up to import only the HPI part of this template – this was unnecessary for this CAT template, as there is no other section included in this template, but this highlights the point that a template can be built by importing only selected elements from other templates. “Merge Template” adds the CAT questionnaire to the build of the new template.

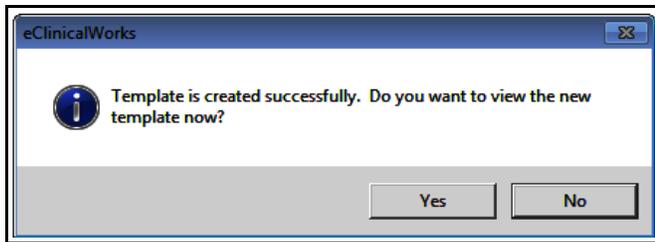


The exam was changed slightly for the new template.

Other changes can be made to other areas of the chart as well. Once the template suits your purposes, click on the arrowhead next to “Templates”, and then choose “Save Notes As Template”.



Give the template a unique name and add it as a favorite. I would not suggest associating this with an order set. In the right panel, I could have chosen “All Options” - it doesn't matter what I choose other than to make sure that I include the sections that are populated. Any section that is blank in the new template will import nothing (so long as the user chooses “Merge Template” when importing this template in the future), but to be more precise, I selected only the populated sections of the template. When all is set, click “OK”.



Click “Yes” to take a look at your new template.

T, TEMPLATES, 39 Y, M Info Hub Allergies Billing Alert

123 Main Street
Anytown, MA 01234
H: 508-836-2700
DOB: 01/01/1980

Wt: 01/01/01: 138 lbs.
App(L): 08/14/18(MB)
PCP: Willis, Sam
Language: English
Translator: No

Ins: Self Pay
Acc Bal: \$0.00
Guar: TEMPLATES
Gr Bal: \$0.00

Medical Summary | OB Summary | CDSS | Alerts | Labs | DI | Procedures | Growth

SF

Progress Notes Scribe Orders

Search Quick

Patient: T, TEMPLATES **DOB:** 01/01/1980 **Age:** 21 Y **Sex:** Male
Phone: 508-836-2700 **Primary Insurance:**
Address: 123 Main Street, Anytown, MA-01234
Account Number: 866666355
PCP: Sam Willis
Encounter Date: 01/01/2001 **Provider:** Bradford Kney, M.D., M.S.

Subjective:
Chief Complaint(s): ▼
 • BDK New Template
HPI: ▼
 Interim history
 New problems - .
 Missed medicine doses in the past month - .
 Reasons for skipping medicines - .
 Here for follow-up.
CAT
 I never cough ____.
 I have no phlegm in my chest ____.
 My chest does not feel tight at all ____.
 When I walk up hill/stairs, I am not breathless ____.
 I am not limited doing any activities at home ____.
 I am confident leaving my home despite my lung condition ____.
 I sleep soundly ____.

All templates belong to the patient “T, Templates”.

ROS: ▼
 BDK review of systems
 Denies excessive fatigue. Denies significant weight gain. Denies unintentional weight loss. Denies new mole(s). Denies changing mole(s). Denies rash. Denies wound that won't heal. Denies blurred vision. Denies change in hearing. Denies shortness of breath. Denies chest pain lasting more than 10 seconds. Denies abdominal pain. Denies joint pains. Denies feeling down, depressed or hopeless. Denies little interest or pleasure in doing things.

Examination: ▼
 General Exam
 General Appearance Well nourished in no acute distress.
 Skin no rash, no suspicious skin lesions.
 Lungs clear to auscultation, no wheezing, rales, or rhonchi, good air exchange.
 Heart regular rhythm, regular rate, no murmur.
 Abdomen soft, nontender, no masses.
 Extremities no edema.

This template successfully incorporated the changes made in the note. It has been saved in the “Favorites” folder, and can be imported to any future patient visit. There are a huge number of public templates in

the Prima CARE ECW production environment which every provider can access – and pull into a note to create a very customized template for future use.

Brad Kney, MD
 July 9, 2019