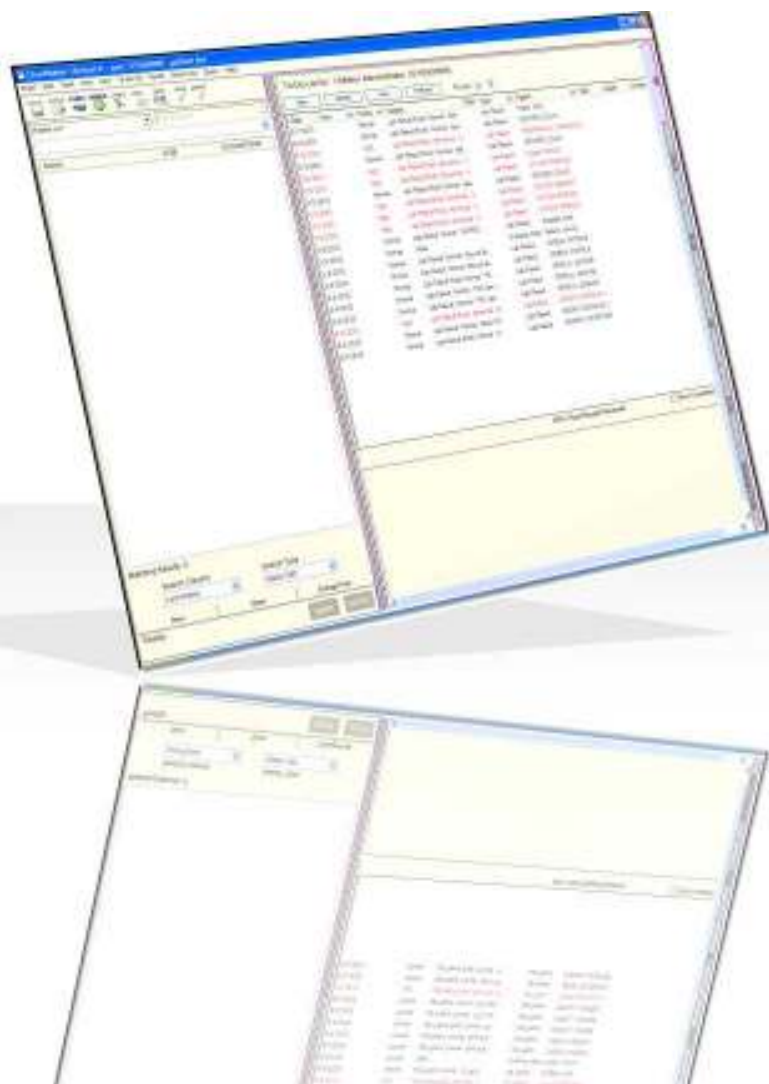


# Template Editing



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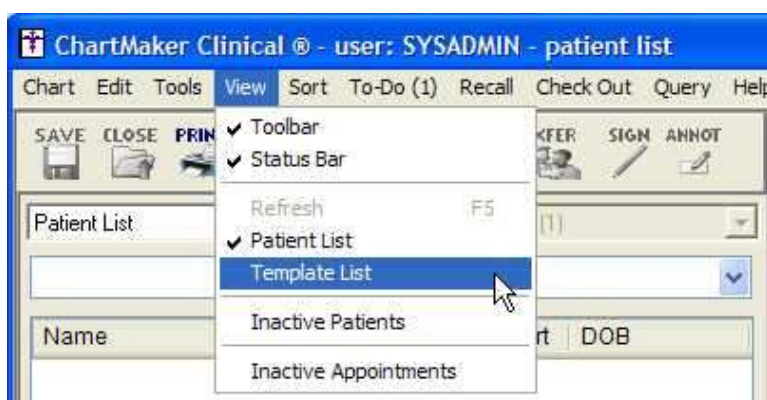
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Along with the ChartMaker Clinical® product, you have the option to purchase a module to customize the types of notes available to you. This module is called Template Editor. Configuring how the note will be laid out is considered creating a “template”. Using the template in a patient’s chart is considered creating a “note”.

## Viewing the Template List

1. Log into ChartMaker Clinical
2. Go to View > Template List



**Note:** If “Template List” is grayed out, this means you do not have the appropriate privileges in order to create templates.

The left-hand side of the screen will now display the template list instead of the patient list.



## Creating a New Template

1. Click "New"



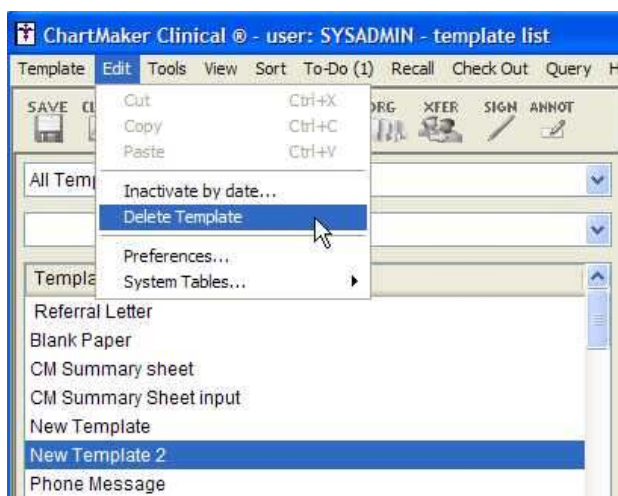
2. Name the template



3. To close the template, click "Template > Close"

## Deleting a Template

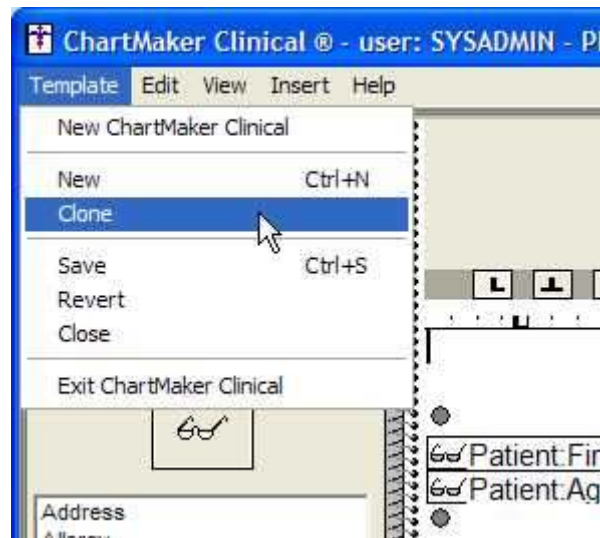
1. From the Template List view, highlight the template
2. Click "Edit > Delete Template"



## Cloning Templates

Instead of starting from scratch, you have the option to copy or “clone” an existing template. Cloning is always a good idea if you are about to make major changes to a template and are not quite sure that you will want to keep those changes.

1. From the Template List view, open the template you want to clone
2. Click “Template > Clone”



**NOTE:** This changes the template name to “Clone of ...”

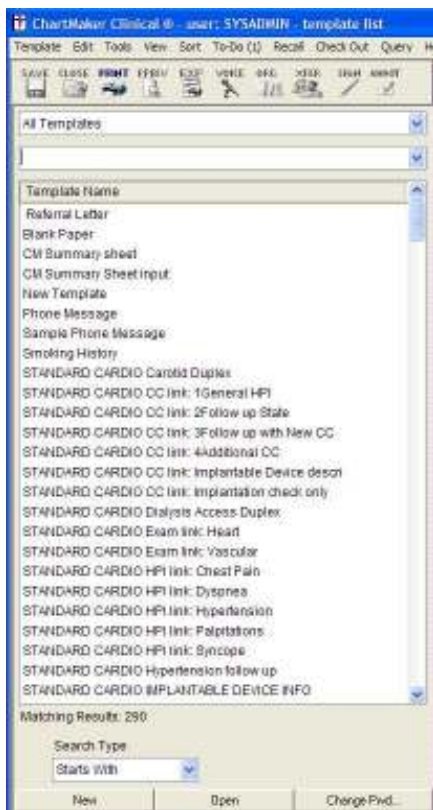
3. Rename the template
4. Make applicable changes and close the template

## Searching for Templates

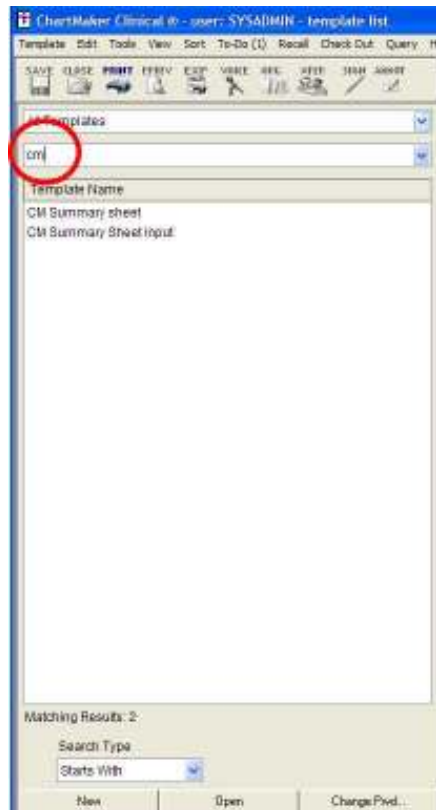
There are several ways to search for a template. You can use the scroll bar to peruse the entire list or utilize the search functionality.

When searching the list of templates, you can also choose to view All, All My Templates (only the ones you created) or All Instant Templates (only the templates that are included on any user's Note List).

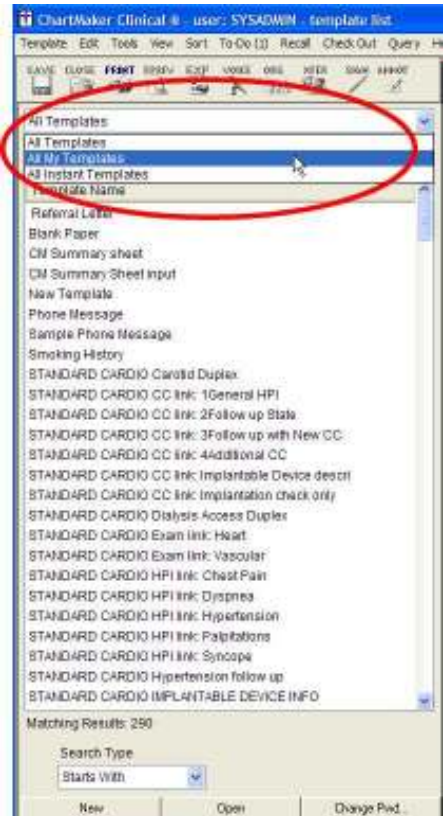
To search by the name, simply start typing the name you are looking for in the blank dropdown. The system will narrow down the results based on what you typed.



**Search all templates**



**Filter the list by name**



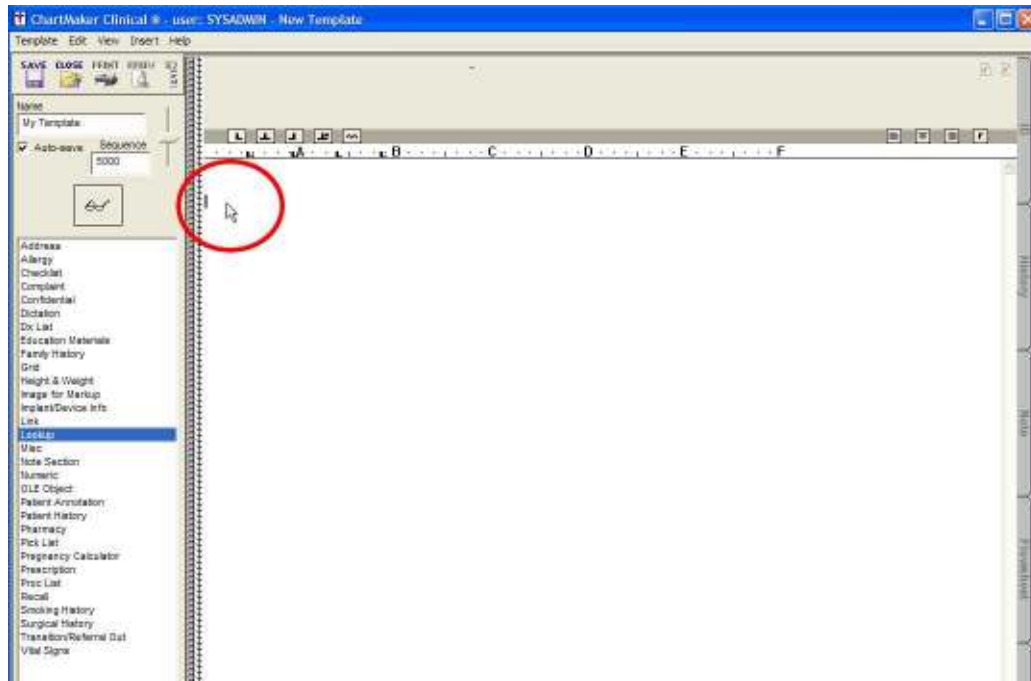
**Search by My Templates  
Or All Instant Templates**

## Template Editing Tools

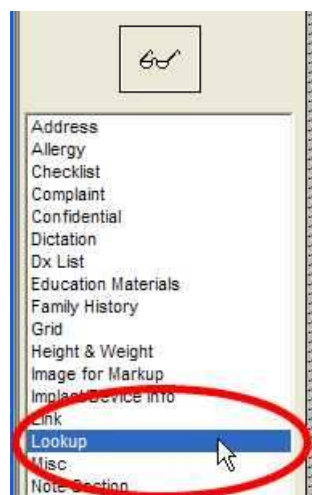
Templates may consist of hardcoded information and/or template tools. Template tools are the utility that makes the template functional. Examples of template tools are numeric fields, lookup fields or pick lists. The template tools define the format of the note.

To add a tool to a template:

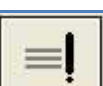
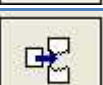
1. From the Template List view, open the template
2. Place the cursor in the document where you want the tool to be located

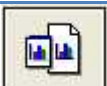


3. Double-click the template tool

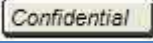
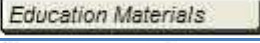
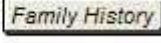
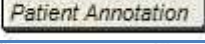
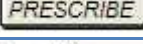
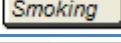
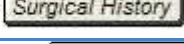
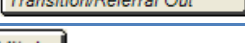


**Optional Method:** You can also highlight the tool and then click the icon (  ) above it.

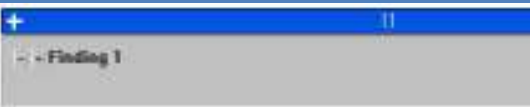
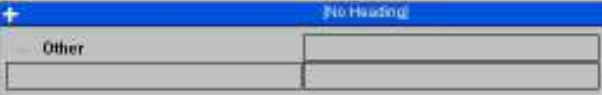
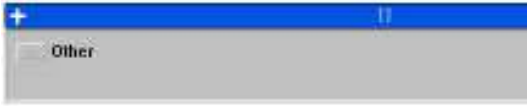
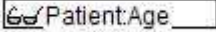
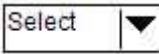
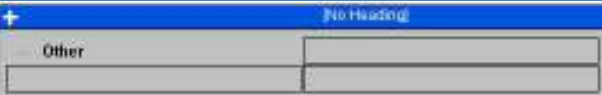
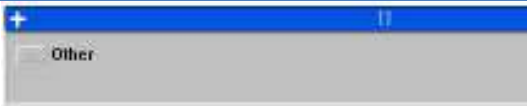
| Tool                | Icon                                                                                | Function                                                                                                                                                                                                                                                                                                                            |
|---------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address             |    | Pull the referring physician name and address in the note. The information is pulled from the ID tab. Adding this tool to a template automatically adds it to the "New Letters" section of the Note tab.                                                                                                                            |
| Allergy             |    | Add allergies to the note and patient's chart. Allergies follow note to note. First DataBank's database is used.                                                                                                                                                                                                                    |
| Checklist           |    | Allows you to enter a list of questions or statements in the note. It is used for a variety of things such as HPI, Review of Systems and Exam. Checklists can have a maximum of 4 columns and 25 rows (100 total items). This is a commonly used tool.                                                                              |
| Complaint           |    | Add chief complaints to the note. This tool links to the Complaints table. The Complaints table is a listing of chief complaints that, when selected, will log the complaint in the History Tab. *Note: This tool is not typically used.                                                                                            |
| Confidential        |    | Allow users with proper privilege to enter and view confidential information for a patient. The user must have the Access Granted level for the Confidentially privilege.                                                                                                                                                           |
| Dictation           |    | The dictation marker determines where the dictated text will be placed when using the voice recognition software. Once the text is inserted, the dictation marker is removed. If using multiple markers, the voice recognition software will locate and replace the first marker and then look for the next and so on and so forth. |
| Dx List             |    | Add diagnoses to the note and patient's chart. Diagnoses follow note to note. The checklist can be configured with just the "Other" button which allows you to search the database or you can hardcode commonly used diagnoses. You can have a maximum of 4 columns and 25 rows (100 total items).                                  |
| Education Materials |  | Document handouts given to the patient in the chart note. These educational materials will then be tracked and counted towards the applicable Meaningful Use measures. Education Material entries can be created and maintained via System Tables.                                                                                  |
| Family History      |  | Add family history items to the note and patient's chart. Family history items follow note to note. This is free-text entry.                                                                                                                                                                                                        |
| Grid                |  | Add a grid-style table to the note. *Note: This tool is not typically used.                                                                                                                                                                                                                                                         |
| Height & Weight     |  | Add height and weight information to the note. If you enter height and weight, the system will calculate BMI and output it in the note. *Note: This tool is no longer used. Use Vital Signs instead.                                                                                                                                |
| Image for Markup    |  | Add a blank Microsoft Paint box into the note. When you double-click on the blank box in the note it will activate the editing tool. The tools are a subset of the options available in Paint. *Note: This tool is not typically used.                                                                                              |
| Implant/Device Info |  | Specify implant/device information for a surgical procedure such as the Type of Device, Manufacturer, Product Name, as well as other pertinent information.                                                                                                                                                                         |
| Link                |  | Add the option for other templates to be linked into the note. This allows you flexibility without cluttering up your note. This tool is often used for exams or diagrams.                                                                                                                                                          |
| Lookup              |  | Insert information from another area of the program into the note. Typically this tool is used to bring in demographic information from the ID tab.                                                                                                                                                                                 |
| Misc                |  | Add miscellaneous information to the note and patient's chart. Miscellaneous notes follow note to note. This is free-text entry.                                                                                                                                                                                                    |

|                         |                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Note Section            |    | Define sections of a chart note for the purpose of outputting that information in another note (i.e. Referral Letter).                                                                                                                                                                                                                                                                   |
| Numeric                 |    | Add a numeric field to the note. Counters may be set to record any numeric value, including decimals and negative numbers. This tool is typically used to record vital signs or lab results and can be linked to a Flowsheet.                                                                                                                                                            |
| OLE Object              |    | Add an OLE (Object Linking and Embedding) button to the note. This allows inclusion of pictures, sound or other items in the note. Any Windows program that supports OLE can be linked through this button. When you double-click on the object in the note it will activate the editing tool. The tools are all the options available in Paint. *Note: This tool is typically not used. |
| Patient Annotation      |    | Add a patient annotation to the note and patient's chart. Patient annotations follow note to note. This is free-text entry.                                                                                                                                                                                                                                                              |
| Patient History         |    | Add patient medical history items to the note and patient's chart. Patient history items follow note to note. This is free-text entry.                                                                                                                                                                                                                                                   |
| Pharmacy                |    | Output the patient's user-defined pharmacy in the chart note. If the patient has more than one pharmacy, you will be able to click on the button and select the one you would like to output.                                                                                                                                                                                            |
| Pick List               |    | Add option for a list of items in the note. This tool is used to create a list of choices that can be outputted in a list or sentence format. This is a commonly used tool.                                                                                                                                                                                                              |
| Pregnancy Calculator    |    | Add pertinent information about pregnancy to the chart note. This information includes date of last menstrual period, date of conception, due date, and date/type of delivery.                                                                                                                                                                                                           |
| Prescription            |   | Add option to include medications in the note and patient's chart. Medications follow note to note. This tool is used to enter current or pre-existing medications as well as medications that the provider is prescribing for the patient today. First DataBank's database is used.                                                                                                     |
| Proc List               |  | Add procedures to the note. The checklist can be configured with just the "Other" button which allows you to search the database or you can hardcode commonly used procedures. You can have a maximum of 4 columns and 25 rows (100 total items).                                                                                                                                        |
| Recall                  |  | Add reminder to the note and patient's chart. This tool creates a popup reminder which appears when any new note is started. A reminder will be placed on the Facesheet as well as the To Do list. *Note: This does not interface with the Practice Manager recall functionality.                                                                                                        |
| Smoking History         |  | Add smoking history to the note and patient's chart. Smoking history information does not follow note to note. The information entered through this dialog will then be tracked and counted towards the applicable Meaningful Use measures.                                                                                                                                              |
| Surgical History        |  | Add surgical history items to the note and patient's chart. Surgical history items follow note to note. This is a free-text entry with the option to enter a date.                                                                                                                                                                                                                       |
| Transition/Referral Out |  | Add free-text notes (up to 255 characters) regarding transition of care or referring out to another physician. The user has the ability to display this note in the chart note as well as on the patient's Face Sheet in the Misc. Note section.                                                                                                                                         |
| Vital Signs             |  | Allow users to enter vital sign information such as temperature, pulse, respiratory rate, blood pressure, height, weight, oxygen saturation, and severity of pain for the patient in the chart note.                                                                                                                                                                                     |

Most of the tools look the same whether you are in Template Editor or in the chart note. The following are the tools that do *not* look different in the two areas:

| Tool                     | Display                                                                                                                 |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Address                  |                                       |
| Allergy                  | Allergies:                           |
| Complaint                |                                       |
| Confidential             |                                       |
| Dictation                |                                       |
| Education Materials      | Education Materials                   |
| Family History           | Family History:                       |
| Grid                     |                                       |
| Height & Weight          | Height & Weight:                     |
| Image for Markup         |                                       |
| Implant/Device Info      | Implant/Device Info                  |
| Misc                     | Miscellaneous Note:                  |
| Note Section             | -----Section Start: Assessment/Plan-----<br>-----Section End: Assessment/Plan-----                                      |
| OLE Object               |                                     |
| Patient Annotation       | Patient Annotation:                 |
| Patient History          | Patient History:                    |
| Pharmacy                 | Pharmacy:                           |
| Prescription             |                                     |
| Recall                   | Recall:                             |
| Smoking History          | Smoking History                    |
| Surgical History         | Surgical History:                   |
| Transition/ Referral Out | Transition of Care / Referral Out  |
| Vital Signs              | Vital Signs                        |

However, several of them look different in Template Editor versus the chart note. They are as follows:

| Tool      | Display in Template Editor                                                        | Display in a Note                                                                   |
|-----------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Checklist |  |  |
| Dx List   |  |  |
| Link      |  |  |
| Lookup    |  |  |
| Numeric   |  |  |
| Pick List |  |  |
| Proc List |  |  |

## Editing Properties of Template Tools

After adding the tool to the template, you will then have the option to personalize the information that it contains. Many of the template tools can be configured to output the information in a certain way. A few of the tools have little or no configuration options available.

| Tool                | Action                                | Editing Options                                                                                                                                                                         |
|---------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address             | No editing options                    | N/A                                                                                                                                                                                     |
| Allergy             | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Checklist           | Right-click on the heading (blue) bar | Edit properties of the checklist as a whole, including headings and beginning statements. Edit individual findings with the option for multi-select, sorting and icons.                 |
| Complaint           | No editing options                    | N/A                                                                                                                                                                                     |
| Confidential        | No editing options                    | N/A                                                                                                                                                                                     |
| Dictation           | No editing options                    | N/A                                                                                                                                                                                     |
| Dx List             | Right-click on the heading (blue) bar | Edit properties of the checklist as a whole, including headings for new, removed, updated and ongoing diagnoses. Edit each cell to include a specific diagnosis, label or other button. |
| Education Materials | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Family History      | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Grid                | Right-click on the tool               | Add rows, columns, labels, text or numbers. Modify row or column height or background colors.                                                                                           |
| Height & Weight     | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Image for Markup    | Double or right-click on the tool     | Add lines, text or shapes                                                                                                                                                               |
| Implant/Device Info | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Link                | Left-click on the tool                | Edit the title of the link as well as add existing templates                                                                                                                            |
| Lookup              | Right-click on the tool               | Select the source and field for the information to be displayed. Add a label to be displayed before the outputted information.                                                          |
| Misc                | Left-click on the tool                | Edit the display name only                                                                                                                                                              |
| Note Section        | Right-click on the tool               | Define the section label                                                                                                                                                                |
| Numeric             | Right-click on the tool               | Edit the text for label or units. Configure the range and properties of the allowable numbers.                                                                                          |
| OLE Object          | Double or right-click on the tool     | Add lines, text or shapes. Insert an OLE object.                                                                                                                                        |
| Patient Annotation  | Left-click on the tool                | Edit the display name only                                                                                                                                                              |

|                         |                                       |                                                                                                                                                                                                                        |
|-------------------------|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Patient History         | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Pharmacy                | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Pick List               | Right-click on the tool               | Edit the list of findings, including the option for a prefix or suffix and the option to multi-select this information                                                                                                 |
| Pregnancy Calculator    | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Prescription            | Right-click on the tool               | Edit the headings for new, renewed, ended and pre-existing medications with the option to hide or output this information.                                                                                             |
| Proc List               | Right-click on the heading (blue) bar | Edit properties of the checklist as a whole, including headings and a beginning statement. Edit each cell to include a specific procedure, label or other button.                                                      |
| Recall                  | No editing options                    | N/A                                                                                                                                                                                                                    |
| Smoking History         | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Surgical History        | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Transition/Referral Out | Left-click on the tool                | Edit the display name only                                                                                                                                                                                             |
| Vital Signs             | Left and Right-click on the tool      | Left-click will allow you to edit the display name. Right-click will allow you to edit the properties for each vital sign including whether that vital is displayed, the default units and minimum and maximum values. |

## Checklist

To edit the properties of a checklist, right-click on the heading (blue) bar. The options are as follows:

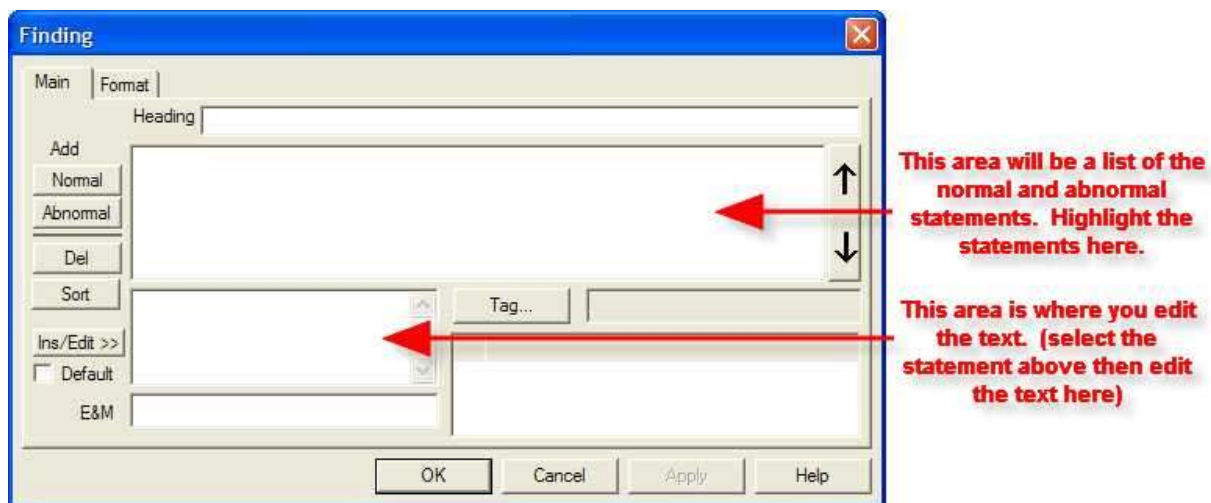
| Field          | Description                                                                                                                                                                                                                                                                                               |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No Output      | If this box is selected, the text in the Heading field will not output in the note. If you want the text to output then uncheck the box.<br>*Note: The No Output box next "Normal Items" is not supported in the current version.                                                                         |
| Heading        | This is the name of the checklist. This name will appear in the heading (blue) bar of the checklist and output in the note if No Output is not selected.                                                                                                                                                  |
| After Heading  | Not supported in the current version                                                                                                                                                                                                                                                                      |
| After All Text | The text or characters in this field will output at the end of the text generated from this checklist. Typically it is either configured to have a period and/or \n for spacing purposes.                                                                                                                 |
| Use List Order | If this box is selected, the option to enter text in "Abnormal Items" is taken away. There is no other functionality beyond this.                                                                                                                                                                         |
| Normal Items   | The text in this field will show up before any normal findings. This is typically used as a beginning statement, such as "The patient denies the following symptoms:".                                                                                                                                    |
| Abnormal Items | The text in this field will show up before any abnormal findings. This is typically used as a beginning statement, such as "The patient reports the following symptoms:".                                                                                                                                 |
| Delimiters     | The punctuation or text that will appear between each selected item in the checklist for the designated field. The most common delimiter would typically be a comma, however if you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n. |
| Conjunctions   | The punctuation or text that will appear before the last selected item in the checklist for the designated field. Common conjunctions would be "and" or "or." If you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n.                |
| Columns        | The number of columns in this checklist. The maximum is 4.                                                                                                                                                                                                                                                |
| Rows           | The number of rows in this checklist. The maximum is 25.                                                                                                                                                                                                                                                  |
| E&M Items      | If this checklist is related to History of Presenting Illness, Review of Systems or Exam you can include the codes to track for E&M coding. See the section E&M Item Codes on p. 34 for more details.                                                                                                     |

|                            |                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable Quick Normals       | If this box is selected, the checklist will have a checkmark (✓) in the heading (blue) bar. When the checkmark is clicked, the first normal finding in the checklist will automatically be selected. This is typically used for “normal” statements such as “The patient’s family medical history is non-contributory”. The checkmark is only visible when the checklist is collapsed. |
| Enable All Normals Checked | If this box is selected, the checklist will have an N in the heading (blue) bar. When the N is clicked, all normal findings in the checklist will automatically be selected. This is typically used in the Review of Systems as a shortcut to bring in all normal statements. The N is only visible when the checklist is collapsed.                                                   |

To add a finding to the checklist, right-click on a cell and choose “Insert finding...”.



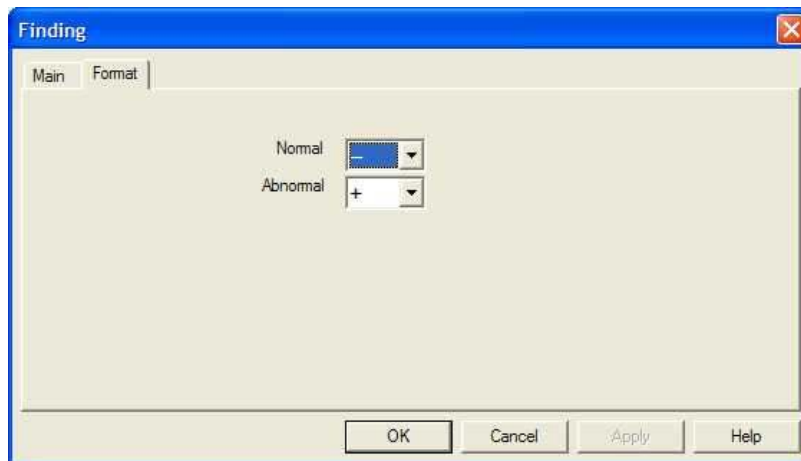
The options on the Main tab are as follows:



| Field    | Description                                                                                                                                                                                                                                                                                                                    |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Heading  | The text that will show up in the selected cell (in the grey area of the checklist). For example, from the screenshot above, “Finding 1” would be an example of the heading.                                                                                                                                                   |
| Normal   | This is the statement that will be displayed when the first icon (or “left-side button”) next to the heading is clicked. You can configure multiple normal statements for one finding. If you have multiple statement options, you will be asked to choose which one you want before the statement is printed in the note.     |
| Abnormal | This is the statement that will be displayed when the second icon (or “right-side button”) next to the heading is clicked. You can configure multiple abnormal statements for one finding. If you have multiple statement options, you will be asked to choose which one you want before the statement is printed in the note. |
| Del      | This will delete the selected statement.                                                                                                                                                                                                                                                                                       |

|          |                                                                                                                                                                                                                                                             |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sort     | This will sort all statements in alphabetical order                                                                                                                                                                                                         |
| Ins/Edit | This gives you the option to add a list to your statement. See the section on Ins/Edit on p. 31 for more information.                                                                                                                                       |
| Default  | If this box is selected, the statement will automatically be selected (the black box [■] will be present) once you click on the normal finding in a note. This is only supported for normal statements.<br>*Note: This functionality is not typically used. |
| E&M      | If this checklist is related to History of Presenting Illness, Review of Systems or Exam you can include the codes to track for E&M coding. See the section on E&M Item Codes on p. 30 for more details.                                                    |
| Tag      | If you would like to tag the information entered in this finding in the History tab and/or on a Flowsheet you would link the condition through this field. *Note: The condition must have “result” selected in the properties.                              |
| ↑ ↓      | Use the arrows to manually change the order of the statements. Highlight the statement first and then click one of the arrows to move it up or down.                                                                                                        |

The options on the Format tab are as follows:



| Field    | Description                                                                                                                                                                                                                                              |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Normal   | This is the symbol or character that will display on the first button (or “left-side button”) next to the heading. The options are -, +, T, F, Y, N, ✕, ✓, ■, □ or O. You can also leave it blank if you do not have a normal statement configured.      |
| Abnormal | This is the symbol or character that will display on the second button (or “right-side button”) next to the heading. The options are -, +, T, F, Y, N, ✕, ✓, ■, □ or O. You can also leave it blank if you do not have an abnormal statement configured. |

### **Other functionality of checklists:**

The functionality listed below is applicable for Checklists, Dx List and Proc lists.

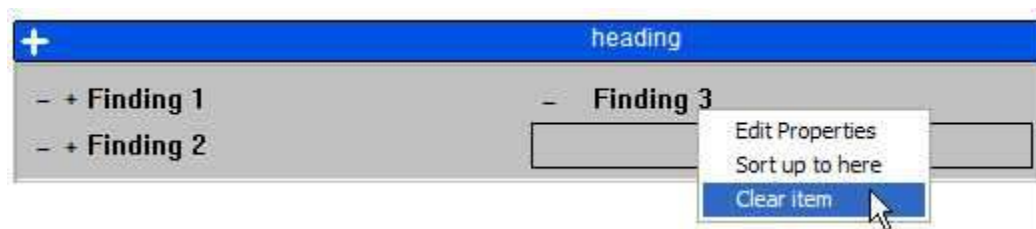
To add a label to the cell (no functionality, just text), right-click on a cell and choose “Insert label...”.



Type the words that you want to appear in the cell and click “OK”.



To clear the text or finding already in a cell, right-click on the cell and choose “Clear item”.



To sort the list alphabetically, right-click on the last cell that you want to be included in the sort and choose “Sort up to here”.



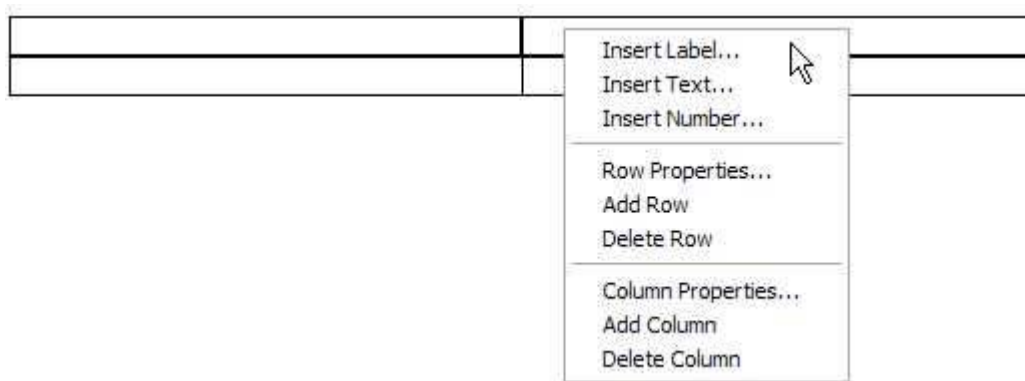
## Dx List

To edit the properties of a diagnosis checklist, right-click on the heading (blue) bar. The options are as follows:

| Field                  | Description                                                                                                                                                                                                                                                                                               |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No Output              | If this box is selected, the text in the field next to it will not output in the note. If you want the text to output then uncheck the box.                                                                                                                                                               |
| Heading                | This is the name of the checklist. This name will appear in the heading (blue) bar of the checklist and output in the note if No Output is not selected.                                                                                                                                                  |
| Delimiters             | The punctuation or text that will appear between each selected item in the checklist for the designated field. The most common delimiter would typically be a comma, however if you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n. |
| Conjunctions           | The punctuation or text that will appear before the last selected item in the checklist for the designated field. Common conjunctions would be "and" or "or." If you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n.                |
| End of List            | The text or characters in this field will output at the end of the text generated from this checklist. Typically it is either configured to have a period and/or \n for spacing purposes.                                                                                                                 |
| New Diagnoses          | The beginning statement or text that will appear before any diagnoses added in the current note. If you want this heading to be on a separate line from the diagnoses that are selected, insert a "\r" after this text.                                                                                   |
| Removed Diagnoses      | The beginning statement or text that will appear before any diagnoses that was removed/ended in the current note. If you want this heading to be on a separate line from the diagnoses that are selected, insert a "\r" after this text.                                                                  |
| Pre-existing Diagnoses | The beginning statement or text that will appear before any diagnoses that was updated/continued in the current note. If you want this heading to be on a separate line from the diagnoses that are selected, insert a "\r" after this text.                                                              |
| Ongoing Diagnoses      | The beginning statement or text that will appear before any diagnoses that was currently on the chart but not modified in the current note. If you want this heading to be on a separate line from the diagnoses that are selected, insert a "\r" after this text.                                        |
| Diagnostic History     | Not supported in the current version                                                                                                                                                                                                                                                                      |
| Columns                | The number of columns in this checklist. The maximum is 4.                                                                                                                                                                                                                                                |
| Rows                   | The number of rows in this checklist. The maximum is 25.                                                                                                                                                                                                                                                  |

## Grid

To edit a Grid, right-click on the Grid. The options are as follows:



| Field                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Insert Label...      | Ability to insert text in the selected cell. The text cannot be edited in the note. You will have the option to change the text color, font and background color of the cell.                                                                                                                                                                                                                                                                           |
| Insert Text...       | Ability to insert text in the selected cell. The text can be edited in the note. You will have the option to change the text color, font and background color of the cell. You also have the option to link the information entered in the History tab or on a Flowsheet. *Note: If you want the ability to enter text in a cell in a note, right-click on the cell and choose "Insert Text". Then simply click "OK". This will make the cell editable. |
| Insert Number...     | Ability to insert a numeric in the selected cell. The number can be edited in the note. You will have the option to change the text color, font and background color of the cell as well as the minimum and maximum range of the number. You also have the option to link the information entered in the History tab or on a Flowsheet.                                                                                                                 |
| Row Properties...    | Ability to edit the height and background color of the row.                                                                                                                                                                                                                                                                                                                                                                                             |
| Add Row              | Ability to add a row to the grid. It will add the row below the cell you clicked on.                                                                                                                                                                                                                                                                                                                                                                    |
| Delete Row           | Ability to delete the selected row.                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Column Properties... | Ability to edit the height and background color of the column.                                                                                                                                                                                                                                                                                                                                                                                          |
| Add Column           | Ability to add a column to the grid. It will add the column to the right of the cell you clicked on.                                                                                                                                                                                                                                                                                                                                                    |
| Delete Column        | Ability to delete the selected column.                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Image for Markup

To edit an image for markup, double-click on the box. The box will change from having a solid black line to the following:



A tool bar will appear in the upper-left corner of the screen. Use the tools in this box to create an image in the box.

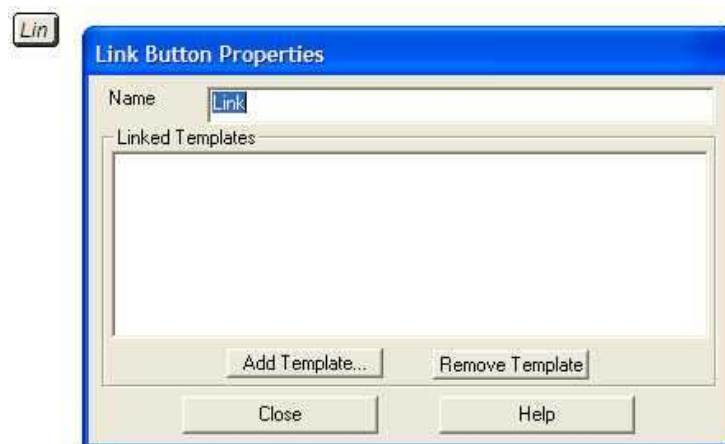


| Tool | Description                                                                                                                                                                                                                                                                |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | This is the select tool. Use this to select pieces of the image once you have already created them. Click on the arrow to activate the tool. Click on the shape, drawing, text, etc. in the image area to highlight it.                                                    |
|      | This is the free-form drawing tool. This will allow you to draw or write as if you were holding a pencil. Click on the pencil to activate the tool. Then click and draw in the image area.                                                                                 |
|      | This is the line tool. This will allow you to draw straight lines, with the option to turn them into an arrow. Click on the line to activate the tool. Then click in the image area and drag. The line will start where you clicked and end where you let go of the mouse. |
|      | This is the text tool. This will allow you to add text to the image area. Click on the abc to activate the tool. Then click in the image area and draw a box (this will be the input area). Start typing the text you want to enter in the image.                          |
|      | This is the shape tool. This will allow you to add shapes such as rectangles and ellipses. Click on the shape to activate the tool. Click on the Options icon to select the shape. Then in the image area, draw a box the size that you want the shape.                    |
|      | This is the options tool. This is applicable for all tools (except the select and zoom tools). In order to use the options tool, you must first click on the tool that you want to edit. Then click on the options tool to view the available options for that tool.       |
|      | This is the zoom in tool. If you click on this icon, you will zoom in on the image area.                                                                                                                                                                                   |
|      | This is the zoom out tool. If you click on this icon, you will zoom out of the image area.                                                                                                                                                                                 |

**NOTE:** When you open the note, the image box will be blank. The image you created will only appear in the note once you have selected the image box (double-click).

## Link

To edit a link, (left) click on the tool. The options are as follows:

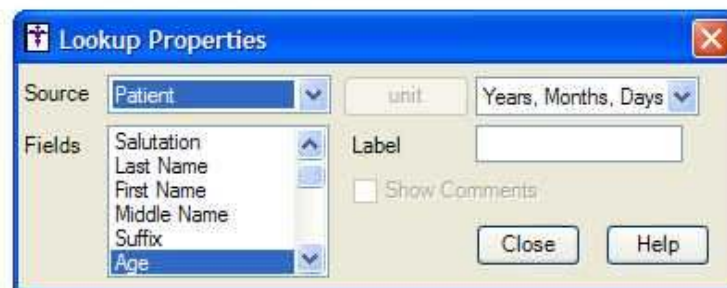


| Field           | Description                                                                                                                                 |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | This will be the text that appears on the link in a note. This text should describe what the user will find once they click on this link.   |
| Add Template... | Choose this option to add templates to the link. The templates chosen here will be the ones available when the link is clicked in the note. |
| Remove Template | Choose this option to remove a template from the list. First highlight the template then click this option.                                 |

## Lookup

To edit a lookup field, right-click on the field and select “Edit Properties”. The options are as follows:

 Patient:Age



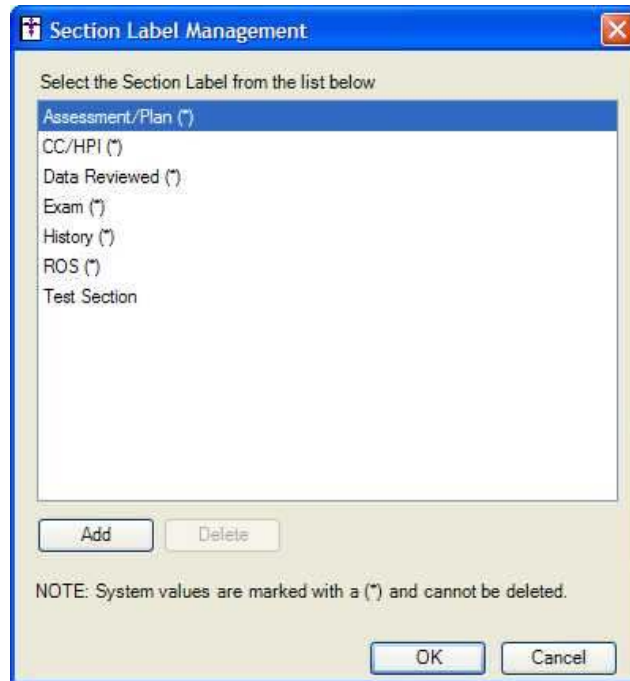
| Field         | Description                                                                                                                                                                                                                        |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Source        | The source selects where from within ChartMaker the information is to be obtained from. You can get information from the Patient, First/Second/Third/Fourth Insurer, Face Sheet, Note, Codes, Addressee, Provider or Note Section. |
| Fields        | The fields are the pieces of information from the selected source to be brought into a patient note. A source must be chosen before selecting the fields.                                                                          |
| Unit/Format   | This field allows you to manipulate the output of the selected field. This field is only available for the following fields: Age, Birth Date, Phone, Referring Physician, Sex, All Face Sheet fields and Date.                     |
| Label         | This is the text that will output before the lookup information. For example, if you are pulling in the birthday you might use "DOB:" in the Label field.                                                                          |
| Show Comments | For applicable fields (i.e. diagnosis), you can choose to have the comments documented for that item output in the note.                                                                                                           |

If the field has the option for Unit/Format available, the options are as follows:

| Lookup Field       | Field Option                        | Field Output                                             |
|--------------------|-------------------------------------|----------------------------------------------------------|
| Patient Age        | Year, Month, Day, Hour, Minute      | 34 year                                                  |
|                    | Years, Months, Days, Hours, Minutes | 34 years                                                 |
| Patient Birth Date | (blank)                             | 09-22-1972                                               |
|                    | MonthDY                             | September 22, 1972                                       |
|                    | MonDY                               | Sep 22, 1972                                             |
| Patient Phone      | (blank)                             | 610-555-1212 (this is their home phone #)                |
|                    | H                                   | 610-555-1212 (this is their home phone #)                |
|                    | W                                   | 610-222-2222 (this is their work phone #)                |
| Patient Sex        | He;She                              | He if the patient is male; She is the patient is female  |
|                    | His;Her                             | His if the patient is male; Her is the patient is female |
|                    | Him:Her                             | Him if the patient is male; Her is the patient is female |
| Note Date          | (blank)                             | 09-22-1972                                               |
|                    | MonthDY                             | September 22, 1972                                       |
|                    | MonDY                               | Sep 22, 1972                                             |

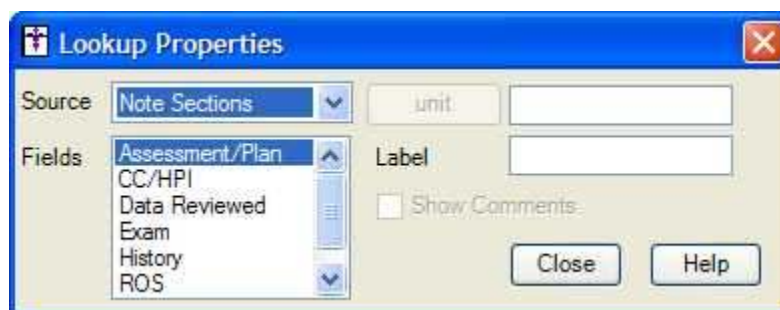
## Note Section

To edit a note section field, right-click on the field and select “Edit Properties”. The options are as follows:



| Option               | Description                                                                                                                                       |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Section Label | Designate which section of the chart note this will be.                                                                                           |
| Add / Delete         | Add (or delete) custom labels for sections that are not already listed. The labels with an asterisk (*) are system entries and cannot be deleted. |

To output this information in another template (i.e. Referral Letter), you must use a Lookup field. The Lookup Source would be set to “Note Sections” and the Fields would be set to whichever “Section Label” is appropriate.



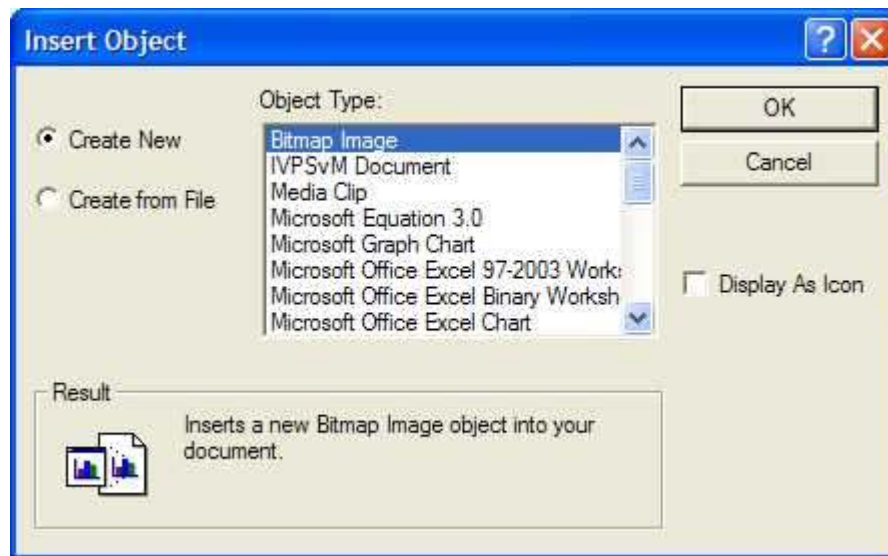
## Numeric

To edit a numeric field, right-click on the field and select “Edit Properties”. The options are as follows:

| Field                  | Description                                                                                                                                                                                                                                                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Condition...           | If you would like to tag the information entered in this numeric field in the History tab and/or on a Flowsheet you would link the condition through this field. *Note: The condition must have “result” selected in the properties.                                                                                     |
| Label                  | This is the text that will precede the numeric field in the note                                                                                                                                                                                                                                                         |
| Unit                   | This is the text that will follow the numeric field in the note                                                                                                                                                                                                                                                          |
| Absolute minimum       | This is the lowest number that can be selected using the up and down arrows from the numeric field in the note. *Note: Any number can always be typed in the numeric box.                                                                                                                                                |
| Allow Negative Numbers | Select this box if you would like the ability to select a negative number in the note                                                                                                                                                                                                                                    |
| Low warning below      | If you would like to be warned if a number is “low”, enter that number in this box. When using this field in a note, if the number entered is equal to or below this number a warning message will appear. *Note: If you do not want any low warnings, set this number to be the same as the “Absolute minimum” value.   |
| Warning messages       | This is the message that will appear if a low or high warning is reached in the note.                                                                                                                                                                                                                                    |
| High warning above     | If you would like to be warned if a number is “high”, enter that number in this box. When using this field in a note, if the number entered is equal to or above this number a warning message will appear. *Note: If you do not want any high warnings, set this number to be the same as the “Absolute maximum” value. |
| Absolute maximum       | This is the highest number that can be selected using the up and down arrows from the numeric field in the note. *Note: Any number can always be typed in the numeric box.                                                                                                                                               |
| Spinner Increment      | The number entered in this field is the incremental increase when using the up and down arrows in the note. *Note: To increase from 100 to 101, use a spinner increment of 1. To increase from 98.6 to 98.7, use a spinner increment of .1.                                                                              |
| Decimal places         | The number of decimal places for this number.                                                                                                                                                                                                                                                                            |
| E&M                    | If this numeric field is a Vital Sign you can include the code to track for E&M coding. Enter “EXAM:Constitutional/3” in this field for it to count towards the Constitutional part of the exam.                                                                                                                         |
| Default Value          | The starting number that appears when you first click the up or down arrow in the note. Typically this is the average or most popular number that will be entered in this field.                                                                                                                                         |

## OLE Object

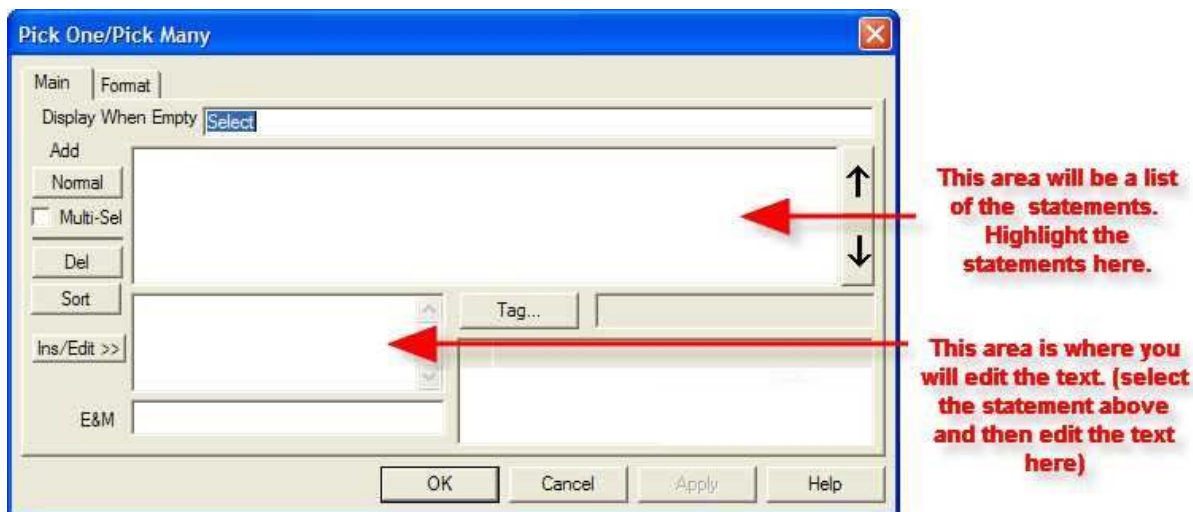
When you add an OLE Object to the template, the options are as follows:



| Option           | Description                                                                                                                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create New       | If you choose to create a new object, you will have the option of it being an image file, MS Excel spreadsheet, MS Word document or WAV clip. You will have the editing options of the program that you chose once the object is inserted in the template. |
| Create from File | If you choose to imbed a file into the template, you will have the option to browse to the location where the file is stored.                                                                                                                              |

## Pick List

To edit the properties of a pick list, right-click on the field and select “Edit Properties”. The options are as follows:



| Field              | Description                                                                                                                                                                                                                                                                                                                |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display When Empty | The text that will be displayed on the pick list. The text should tell the user what this pick list is being used for.                                                                                                                                                                                                     |
| Normal             | This is the statement that will be displayed when the first icon (or “left-side button”) next to the heading is clicked. You can configure multiple normal statements for one finding. If you have multiple statement options, you will be asked to choose which one you want before the statement is printed in the note. |
| Multi-Sel          | If this box is selected, the user will have the option to choose multiple statements at a time when using the pick list.                                                                                                                                                                                                   |
| Del                | This will delete the selected statement.                                                                                                                                                                                                                                                                                   |
| Sort               | This will sort all statements in alphabetical order.                                                                                                                                                                                                                                                                       |
| Ins/Edit           | This gives you the option to add a list to your statement. See the section on Ins/Edit for more information.                                                                                                                                                                                                               |
| E&M                | If this checklist is related to History of Presenting Illness, Review of Systems or Exam you can include the codes to track for E&M coding. See the section on E&M Item Codes for more details.                                                                                                                            |
| Tag                | If you would like to tag the information entered in this finding in the History tab and/or on a Flowsheet you would link the condition through this field. *Note: The condition must have “result” selected in the properties.                                                                                             |
| ↑ ↓                | Use the arrows to manually change the order of the statements. Highlight the statement first and then click one of the arrows to move it up or down.                                                                                                                                                                       |

The options on the Format tab are as follows:

The screenshot shows a dialog box titled "Pick One/Pick Many" with a close button (X) in the top right corner. It has two tabs: "Main" and "Format", with "Format" currently selected. The "Format" tab contains the following fields and options:

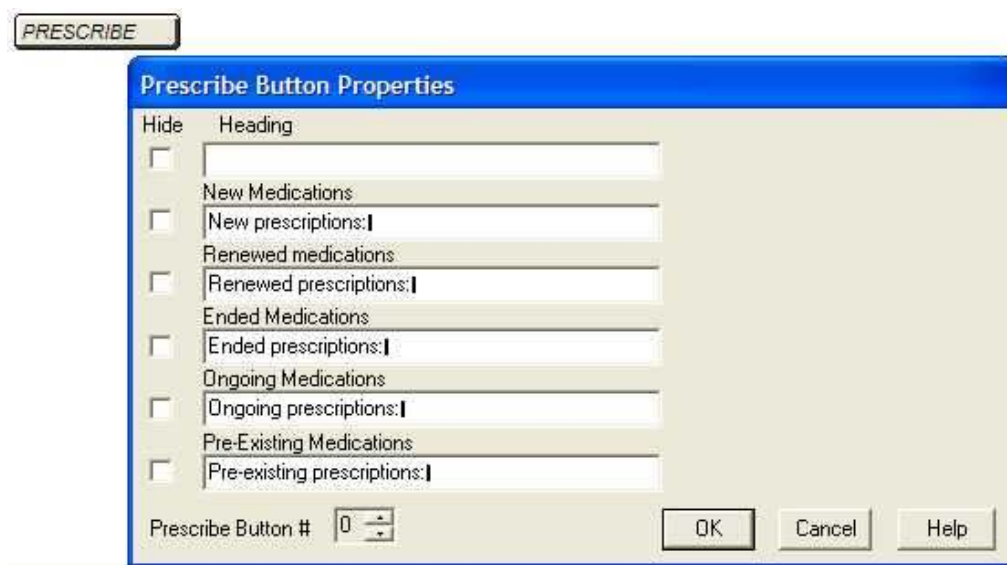
- Prefix:** A text input field.
- Suffix:** A text input field.
- If in middle of list, follow with:** A dropdown menu showing a comma (`,`).
- If at end of list, precede with:** A dropdown menu showing the word "and".
- If at end of list, follow with:** A dropdown menu showing a period (`,`).

At the bottom of the dialog box are four buttons: "OK", "Cancel", "Apply", and "Help".

| Field                             | Description                                                                                                                                                                                                                                                                        |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prefix                            | The text that will display before the statement(s) selected from this pick list in the note. Typically this is a "heading" and/or can be the same text as configured in the "Display When Empty" field on the Main tab.                                                            |
| Suffix                            | The text that will display after the statement(s) selected from this pick list in the note.                                                                                                                                                                                        |
| If in middle of list, follow with | The punctuation or text that will appear in between statements. If multi-select is turned on and 3 statements were selected, this is the punctuation between the first and second statement.                                                                                       |
| If at end of list, precede with   | The punctuation or text that will appear in between statements. If multi-select is turned on and 3 statements were selected, this is the punctuation between the second and third statement.                                                                                       |
| If at end of list, follow with    | The punctuation or command that will appear or happen after the last statement selected. This is typically set to a period if the outputted text is in a sentence format. If the outputted text is a list then this field is left blank. You can also use \r and \n in this field. |

## Prescription

To edit the properties, right-click on the prescribe button. The options are as follows:



| Field                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hide                     | If this box is selected, the text in the field next to it will not output in the note. If you want the text to output then uncheck the box.                                                                                                                                                                                                                                                                                                         |
| Heading                  | The text that will appear before the prescribe button. This text is only visible in the note view and does not print out (not visible in Print Preview or when the note is signed).                                                                                                                                                                                                                                                                 |
| New Medications          | The beginning statement or text that will appear before any medications added in the current note. If you want this heading to be on a separate line from the medications that are added, insert a “\r” after this text.                                                                                                                                                                                                                            |
| Renewed medications      | The beginning statement or text that will appear before any medications that were renewed in the current note. If you want this heading to be on a separate line from the medications that are added, insert a “\r” after this text.                                                                                                                                                                                                                |
| Ended Medications        | The beginning statement or text that will appear before any medications that were ended/removed in the current note. If you want this heading to be on a separate line from the medications that are added, insert a “\r” after this text.                                                                                                                                                                                                          |
| Ongoing Medications      | The beginning statement or text that will appear before any current medications on the chart. If you want this heading to be on a separate line from the medications that are added, insert a “\r” after this text.                                                                                                                                                                                                                                 |
| Pre-Existing Medications | The beginning statement or text that will appear before any pre-existing medications on the chart or added in the current note. If you want this heading to be on a separate line from the medications that are added, insert a “\r” after this text.                                                                                                                                                                                               |
| Prescribe Button #       | In order to make multiple prescribe buttons independent of each other (meaning that you will not see that type of action documented in any of the other prescribe buttons), you must assign each prescribe button a unique number. An example would be if you have a prescribe button in the “Current Medication” area as well as the “Plan” area. The prescribe button in the Current Medication area could be numbered “1” and the Plan area “2”. |

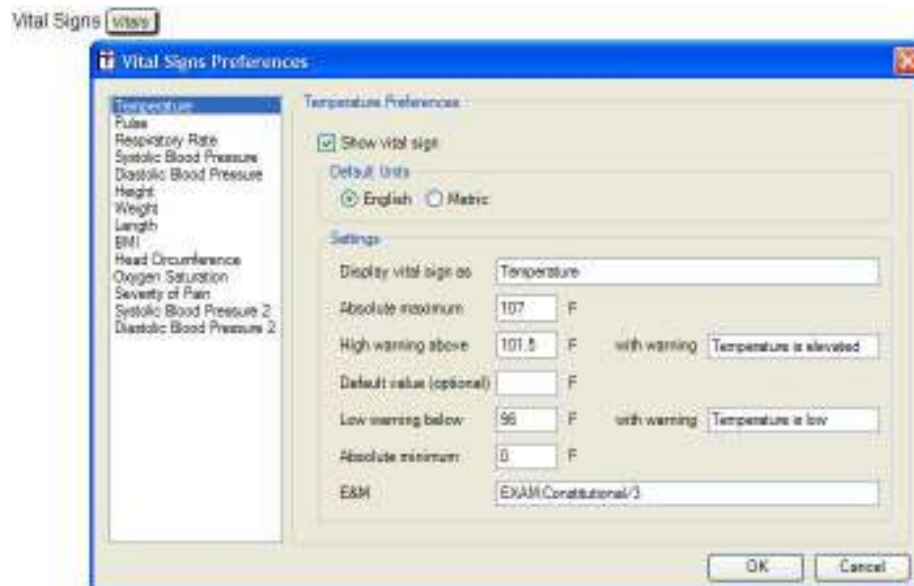
## Proc List

To edit the properties of a procedure checklist, right-click on the heading (blue) bar. The options are as follows:

| Field              | Description                                                                                                                                                                                                                                                                                               |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Checkbox           | If this box is selected, the text in the field next to it will not output in the note. If you want the text to output then uncheck the box.                                                                                                                                                               |
| Heading            | This is the name of the checklist. This name will appear in the heading (blue) bar of the checklist and output in the note if the checkbox next to it is not selected.                                                                                                                                    |
| Delimiters         | The punctuation or text that will appear between each selected item in the checklist for the designated field. The most common delimiter would typically be a comma, however if you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n. |
| Conjunctions       | The punctuation or text that will appear before the last selected item in the checklist for the designated field. Common conjunctions would be "and" or "or." If you want each finding to be its own sentence then use a period in this field. Other options would be to use the \r or \n.                |
| End of List        | The text or characters in this field will output at the end of the text generated from this checklist. Typically it is either configured to have a period and/or \n for spacing purposes.                                                                                                                 |
| Procedures Ordered | The beginning statement or text that will appear before any procedures/tests added in the current note. If you want this heading to be on a separate line from the procedures/tests that are selected, insert a "\r" after this text.                                                                     |
| Columns            | The number of columns in this checklist. The maximum is 4.                                                                                                                                                                                                                                                |
| Rows               | The number of rows in this checklist. The maximum is 25.                                                                                                                                                                                                                                                  |

## Vital Signs

To edit the properties, right-click on the vital signs button and select “Edit Properties”. The options are as follows:



| Field                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show vital sign       | If this box is selected, the highlighted vital sign will show in the dialog in the chart note. Uncheck this box for vital signs that your practice does not document.                                                                                                                                                                                                                                                       |
| Default Units         | Select the preferred measurement units. Whichever option is selected here will be the default; however, you will also have the option to change it in the vital signs dialog.                                                                                                                                                                                                                                               |
| Display vital sign as | This will be the text that is printed in the chart note for this vital sign.                                                                                                                                                                                                                                                                                                                                                |
| Absolute maximum      | This is the highest number that can be entered for this vital sign in the chart note.                                                                                                                                                                                                                                                                                                                                       |
| High warning above    | If you would like to be warned if a value is “high”, enter that number in this box. When using this field in a note, if the number entered is equal to or above this number a warning message will appear. *Note: If you do not want any high warnings, set this number to be the same as the “Absolute maximum” value. You can also customize the text that will appear on the warning dialog in the “with warning” field. |
| Default value         | The starting number that appears when you first click or activate the field. Typically this is the average or most popular value that will be entered in this field.                                                                                                                                                                                                                                                        |
| Low warning below     | If you would like to be warned if a value is “low”, enter that number in this box. When using this field in a note, if the number entered is equal to or below this number a warning message will appear. *Note: If you do not want any low warnings, set this number to be the same as the “Absolute minimum” value. You can also customize the text that will appear on the warning dialog in the “with warning” field.   |
| Absolute minimum      | This is the lowest number that can be entered for this vital sign in the chart note.                                                                                                                                                                                                                                                                                                                                        |
| E&M                   | This field is defaulted to “EXAM:Constitutional/3” which will allow the system to count this towards the Constitutional part of the exam for E&M tracking.                                                                                                                                                                                                                                                                  |

## Ins/Edit

The Ins/Edit option is found in checklists and pick lists. It provides you the option to create a list within a statement. The Ins/Edit dialog is broken into two sections – Numeric Part and List Part. You can either create a numeric option list (“Numeric Part”) or an alphanumeric option list (“List Part”). When creating the option list you must choose one or the other.

To create an ins/edit option list:

1. Open the checklist or pick list (right-click and choose “Edit Properties”)
2. Highlight the statement at the top (or add a new one by clicking “Normal” or “Abnormal”)
3. In the bottom box, place your cursor where you want to add an ins/edit option list
4. Click “Ins/Edit >>”
5. Add a label, items and/or any other configurations
6. Click “OK”
7. Click “OK” to save the finding

The details for the ins/edit dialog are as follows:

The screenshot shows the 'New Followup Question' dialog box. It is divided into two main sections: 'Numeric Part' and 'List Part'. The 'Numeric Part' section contains input fields for 'Label', 'Minimum' (set to 0), 'Low' (set to 0), 'Initial Value' (set to 0), 'High' (set to 0), 'Max' (set to 0), and 'Decimals' (set to 0). The 'List Part' section contains a 'Label' field, an 'Item' field, and a list box. Below the list box are buttons for 'Insert Item >>', '<< Remove and Edit', and 'Sort'. There are also checkboxes for 'Multi-Select' and 'Allow free text'. At the bottom, there are fields for 'Between Items', 'Before End', 'and', 'After End', and 'End'. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

**Numeric Part**

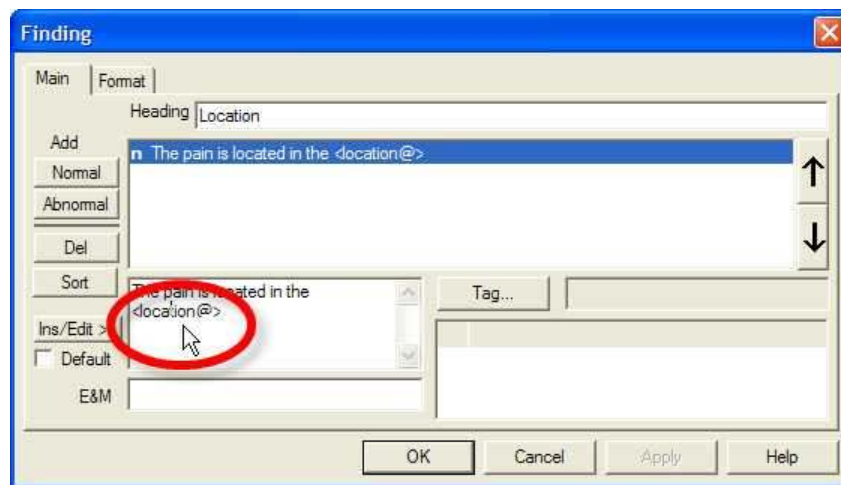
| <b>Field</b>  | <b>Description</b>                                                                                                                                                                        |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Label         | The text that will show when the user is prompted for the list. This should be descriptive enough so that the user knows what they are choosing. Symbols are not supported in this field. |
| Minimum       | This is the lowest number that can be selected using the up and down arrows from the numeric field in the note. *Note: Any number can always be typed in the numeric box.                 |
| Low           | A value that you consider “low” for this option. No warnings are created. Typically this field is set to the same as “minimum”.                                                           |
| Initial Value | The starting number that appears when you first click the up or down arrow in the note. Typically this is the average or most popular number that will be entered in this field.          |
| High          | A value that you consider “high” for this option. No warnings are created. Typically this field is set to the same as “max”.                                                              |
| Max           | This is the highest number that can be selected using the up and down arrows from the numeric field in the note. *Note: Any number can always be typed in the numeric box.                |
| Decimals      | The number of decimal places for this number.                                                                                                                                             |

**List Part**

| <b>Field</b>       | <b>Description</b>                                                                                                                                                                                                                                                                       |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Label              | The text that will show when the user is prompted for the list. This should be descriptive enough so that the user knows what they are choosing. Symbols are not supported in this field.                                                                                                |
| Item               | Enter the options for the list in this field. Then click “Insert Item >>” to add it to the list.                                                                                                                                                                                         |
| Insert Item >>     | After entering text in the “Item” field, click this button to insert the item to the list.                                                                                                                                                                                               |
| << Remove and Edit | Highlight the item in the list to the right and click this button to remove and/or edit an item. When you click “Remove and Edit”, it takes the option out of the list and places the text in the “Item” box for editing. If you plan to delete the item, just click “OK” at this point. |
| Sort               | This will sort all statements in alphabetical order.                                                                                                                                                                                                                                     |
| Multi-Select       | If this box is selected, the user will have the option to choose multiple items at a time when using the option list. If this option is turned on, the option for Allow Free Text is disabled.                                                                                           |
| Allow free text    | If this box is selected, the user will have the option to free-text their answer to the question. This can be turned on in conjunction with a list or just by itself. If this option is turned on, the option for Multi-Select is disabled.                                              |
| Between Items      | The punctuation or text that will appear in between statements. If multi-select is turned on and 3 statements were selected, this is the punctuation between the first and second statement. This is typically set to a comma.                                                           |
| Before End         | The punctuation or text that will appear in between statements. If multi-select is turned on and 3 statements were selected, this is the punctuation between the second and third statement. This is typically set to the word “and”.                                                    |
| After End          | The punctuation or command that will appear or happen after the last option selected. This is typically left blank since the list options are usually in the middle of a sentence.                                                                                                       |

To edit an ins/edit option list:

1. Open the checklist or pick list (right-click and choose “Edit Properties”)
2. Highlight the statement at the top
3. In the bottom box, place your cursor somewhere in between the brackets of the option list

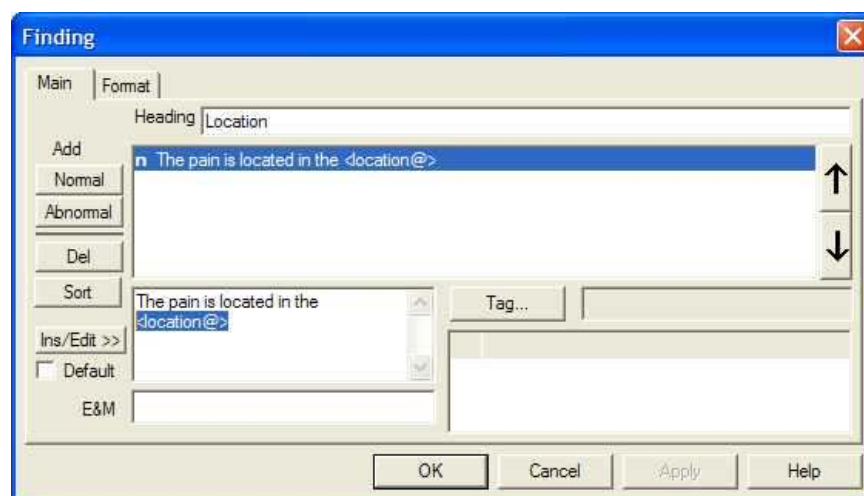


**NOTE:** If you do not put the cursor somewhere in between the brackets the system will think you want to create a new option list instead of edit the existing one.

4. Click “Ins/Edit >>”
5. Add a label, items and/or any other configurations
6. Click “OK”
7. Click “OK” to save the finding

To delete an ins/edit option list:

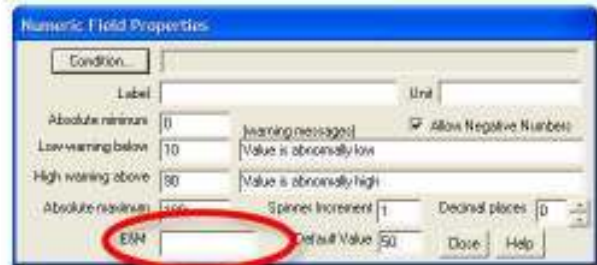
1. Open the checklist or pick list (right-click and choose “Edit Properties”)
2. Highlight the statement at the top
3. In the bottom box, highlight the option list from bracket to bracket



4. Hit “Delete” on your keyboard

## E&M Item Codes

ChartMaker has a built-in E&M coding functionality to give you an estimate on the level you may bill for the current visit. Information for History of Presenting Illness, Review of Systems and Exam can all be configured in the template within a checklist, pick list or numeric field. (Information on medical decision making and PFSH must be manually selected from within the E&M Guidelines dialog)



The codes should be placed in the E&M box written exactly as follows:

| History of Presenting Illness | Review of Systems                      | Exam                                                                          |
|-------------------------------|----------------------------------------|-------------------------------------------------------------------------------|
| HPI:Associated Signs          | ROS:Cardiovascular                     | EXAM:Abdomen                                                                  |
| HPI:Context                   | ROS:Constitutional                     | EXAM:Back                                                                     |
| HPI:Duration                  | ROS:ENT                                | EXAM:Cardiovascular                                                           |
| HPI:Location                  | ROS:Eyes                               | EXAM:Chest                                                                    |
| HPI:Modifying Factors         | ROS:GI                                 | EXAM:Constitutional or<br>EXAM:Constitutional/3 if using for a<br>vitals sign |
| HPI:Quality                   | ROS:GU                                 | EXAM:ENT                                                                      |
| HPI:Severity                  | ROS:Hemtalologic,Lymphatic,Immunologic | EXAM:Eyes                                                                     |
| HPI:Timing                    | ROS:Musculoskeletal                    | EXAM:Genitalia                                                                |
|                               | ROS:Neurologic                         | EXAM:GI                                                                       |
|                               | ROS:Psychiatric                        | EXAM:GU                                                                       |
|                               | ROS:Respiratory                        | EXAM:Head                                                                     |
|                               | ROS:Skin                               | EXAM:<br>Hemtalologic,Lymphatic,Immunologic                                   |
|                               |                                        | EXAM:Left Arm                                                                 |
|                               |                                        | EXAM:Left Leg                                                                 |
|                               |                                        | EXAM:Musculoskeletal                                                          |
|                               |                                        | EXAM:Neck                                                                     |
|                               |                                        | EXAM:Neurologic                                                               |
|                               |                                        | EXAM:Psychiatric                                                              |
|                               |                                        | EXAM:Respiratory                                                              |
|                               |                                        | EXAM:Right Arm                                                                |
|                               |                                        | EXAM:Right Leg                                                                |
|                               |                                        | EXAM:Skin                                                                     |

## Additional Template Tools

In the template editor window, there are icons at the top that allow the text to be positioned differently and/or modified. They are listed as follows:

| Icon                                                                              | Description                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Insert a left-justified tab stop                                                                                                                                                              |
|  | Insert a center-justified tab stop                                                                                                                                                            |
|  | Insert a right-justified tab stop                                                                                                                                                             |
|  | Insert a decimal tab stop                                                                                                                                                                     |
|  | Insert a section break. A section break needs to be inserted at the beginning and end of any area that you would like to use tab stops within. You will see an orange line across the screen. |
|  | Left justifies text                                                                                                                                                                           |
|  | Center justifies text                                                                                                                                                                         |
|  | Right justifies text                                                                                                                                                                          |
|  | Opens the dialog to edit the font. This includes font style, size, effects and color.                                                                                                         |

Within the template, there are certain keystrokes that provide additional functionality. They are listed as follows:

| Keystroke     | Description                                                                                                                                                                                                                                        |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ctrl + Enter  | This will add a permanent blank line in the template. This is also referred to as a “meatball”. * Note: Hitting the Enter key will only provide a visual blank line and does not actually leave space. Use the Enter key just to space things out. |
| Shift + Enter | This will add a permanent blank line in the template. This is also referred to as a “meatball”. * Note: Hitting the Enter key will only provide a visual blank line and does not actually leave space. Use the Enter key just to space things out. |
| Ctrl + L      | This will add a page break in the template. You will see a green line go across the screen.                                                                                                                                                        |

Within checklists and pick lists, you have the ability to hardcode spacing after text. This is done by inserting the following commands after the text:

| Command | Description                                                     |
|---------|-----------------------------------------------------------------|
| \r      | Insert a hard return after the text (next line)                 |
| \n      | Insert a new paragraph after the text (double-space in between) |

## Glossary of Terms

| Term         | Definition                                                                                                                                |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Clone        | To create a copy of an existing template                                                                                                  |
| Finding      | Information in a checklist or pick list. In a checklist, each cell is considered a different finding.                                     |
| Instant Note | A note in a patient's chart such as an initial or follow up exam created by someone in the practice                                       |
| Meatball     | Double-spacing in between paragraphs. You will see a "bullet" on the screen but nothing prints out                                        |
| Template     | The layout, organization or structure of an instant note                                                                                  |
| \r           | Command to tell the system to return to the next line. This is typically placed after text in the properties of a checklist or pick list. |
| \n           | Command to tell the system to create a new paragraph. This is typically placed after text in the properties of a checklist or pick list.  |

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**Phone:** \_\_\_\_\_

**1-800-487-9135 (Option 6)**

[illegible]