

How to create a template in eClinicalWorks

This guide walks you through how to create a template in eClinicalWorks (ECW), starting with a custom structured data template inside the HPI (History of Present Illness) section. You will learn how to add structured fields of different types, build conditional branching logic, and use both your new template and existing favorite templates to populate a patient note efficiently.

Prerequisites

- Access to a patient chart in eClinicalWorks.
- Custom template creation privileges on your user account. If the **Custom** button is missing or grayed out at any point, contact your system administrator to enable this privilege.

Open the patient chart and navigate to HPI

Step 1: Open the patient chart and locate HPI

Open the patient chart in ECW and locate the HPI section within the patient summary. Make sure you are working in the main HPI window rather than using inline editing. The HPI window may open in full-screen mode for typing or dictation; if it appears maximized, proceed to the next step to adjust the view.

The screenshot displays a patient chart for WOLVERINE, Logan (Wolfenstein, L.), 49 Y, M. The patient's demographic information includes DOB: 01/01/1975, Age: 49 Y, Sex: Male, and Address: 1002 E 1890 W, Orem, UT 84057. The chart is open to the HPI section, which shows a list of current medications and a list of favorite templates on the right. The medications listed include Estradiol 1 MG Tablet 1 tablet Orally Once a day, Lisinopril 10 MG Tablet 1 tablet Orally Once a day, Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain, May cause drowsiness, and others. The favorite templates on the right include EBP, ECG Acute Visit Note, ECG COVID visit, ECG Group, ECG Fall single family, ECG H-Pylori-Amox/Clarith/Omepr/Pepso, ECG Tonsillitis, ECG Training Test, GMC Abdominal pain, GMC Ankle Sprain, left, GMC Ankle Sprain, right, GMC Asthma Exacerbation-Urgent Care, GMC Bell's Palsy, GMC Bursitis Fracture, left, GMC Bursitis Fracture, right, GMC Bronchitis, GMC Bronchitis RSV Positive, GMC Cerebral Impaction w/ Irrigation, GMC Chest Pain, GMC Concussion, GMC Conjunctivitis, bilateral, GMC Conjunctivitis, left, GMC Conjunctivitis, right, GMC COVID-19 In House PCR Test, and GMC COVID-19 Respiratory Panel (COVID, Flu A/B, RSV).

Patient chart open to the HPI section, showing patient demographics, chief complaints, current medications, and a list of favorite templates on the right

Step 2: Adjust the HPI window to view additional options

If the HPI window is fully expanded, click the designated area or button to shrink it. This reveals additional options and categories on the left side of the screen.

The screenshot displays a medical software interface for a patient named WOLVERINE, Logan. The interface includes a top navigation bar with tabs for Medical Summary, Orders, Lab, Procedures, Growth Chart, Immunizations, and Notes. The main content area is divided into several sections: Subjective, Objective, Assessment, and Plan. The Subjective section is currently expanded, showing a list of symptoms and their associated medications. The Objective section is collapsed. The Assessment section is also collapsed. The Plan section is collapsed. The right side of the screen features a sidebar with a list of templates and a search bar. The bottom of the screen shows a status bar with various icons and a timestamp.

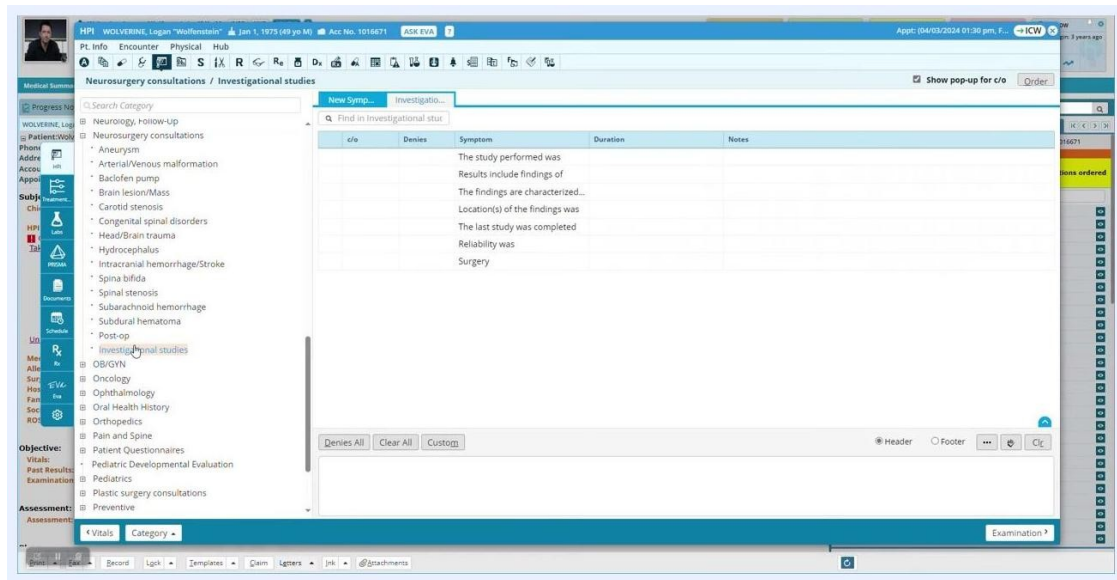
HPI window with the expanded view shrunk, revealing more categories on the left

In the HPI window, review the list of available categories on the left. For this walkthrough, select a section not typically used in your production environment, such as **Neurosurgery consultations**. Scroll through the list and click on it.



Step 4: Choose the specific subsection

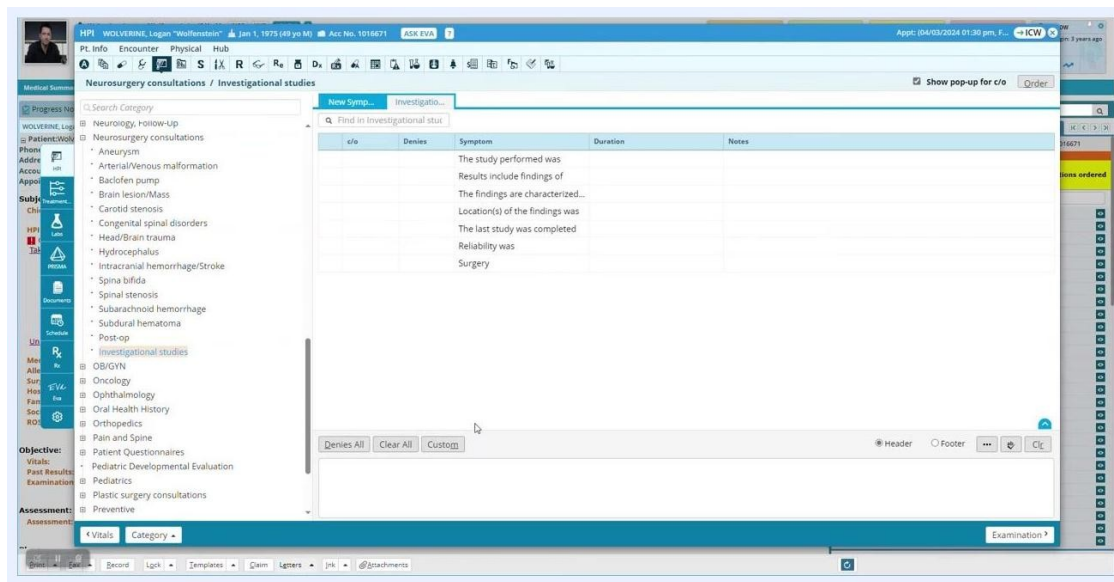
Under **Neurosurgery consultations**, select **Investigational studies** as the subsection where you want to create your template. Click on it to display its current items.



Investigational studies subsection selected, showing existing items in the right pane

Step 5: Check for custom template privileges

Look for the **Custom** button at the bottom of the window. If it is visible and enabled, you have the necessary privileges to continue. If it is missing or grayed out, contact your system administrator before proceeding.



Investigational studies section with the "Custom" button visible at the bottom, ready for template creation

Create a custom structured template

Step 6: Initiate custom template creation

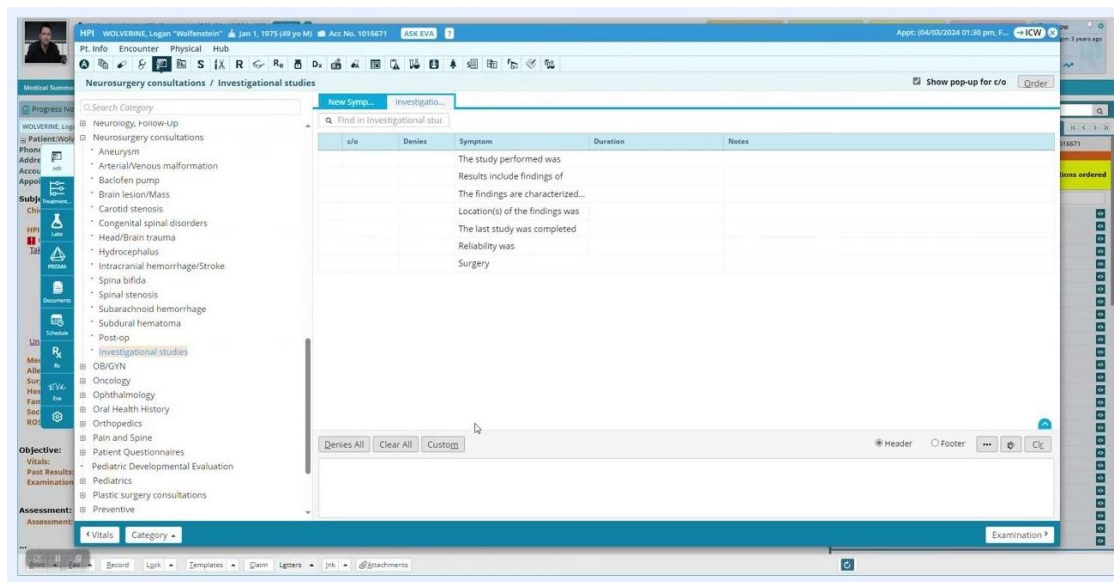
Once your privileges are confirmed, click the **Custom** button. A new window or section appears, displaying the same list of items you saw previously.

Step 7: Add a new template

Click **Add** to create a new template entry, enter a name for your template (for example, "Template examples"), and click **OK** to save it. The new template now appears in the list alongside existing items.

Step 8: Mark the template as structured

Locate the **Struct** column at the top of the list. Click the checkbox or indicator in the **Struct** column for your new template to designate it as structured, then click **Save Structured Flag** to apply the setting.



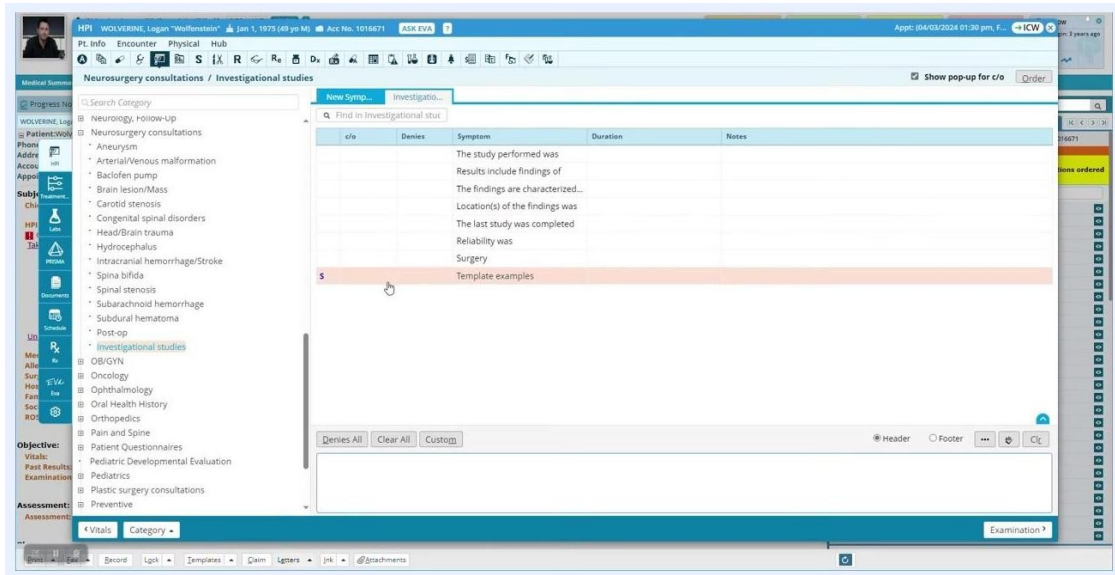
Template list with the new "Template examples" entry and the "Struct" column highlighted for marking as structured



Note: Always confirm you are working in the correct section and have the necessary privileges before creating or modifying templates. If you run into permission issues, consult your system administrator.

Step 9: Verify the structured template indicator

After saving your template and marking it as structured, look for a small "S" icon next to your template name in the list (for example, "Template examples"). This icon confirms the template is structured, distinguishing it from non-structured templates.

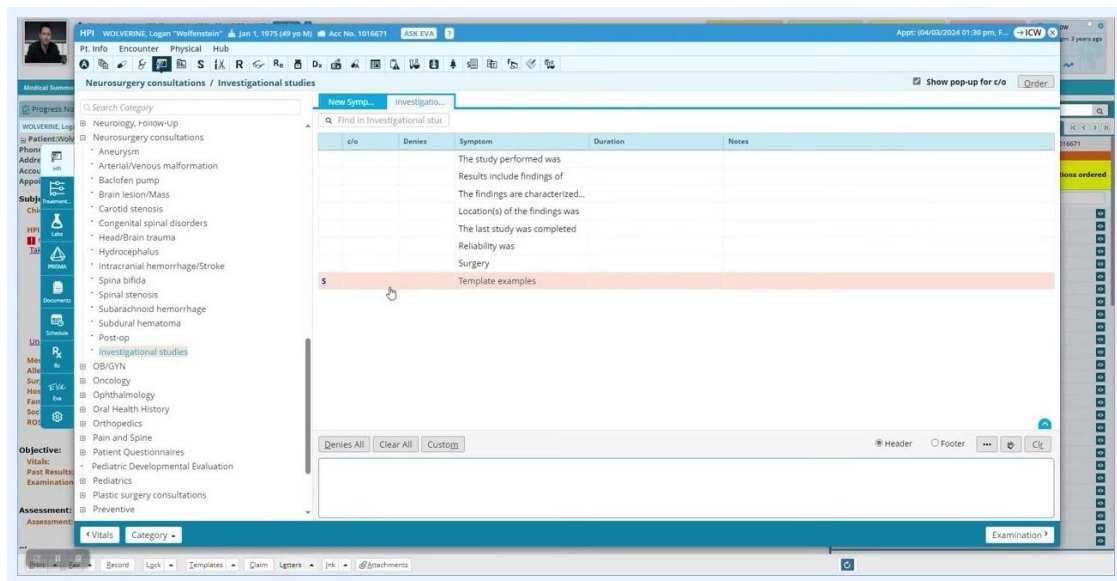


Template list with "Template examples" highlighted and a small "S" icon indicating it is structured

Open the structured template for editing

Step 10: Open the structured template

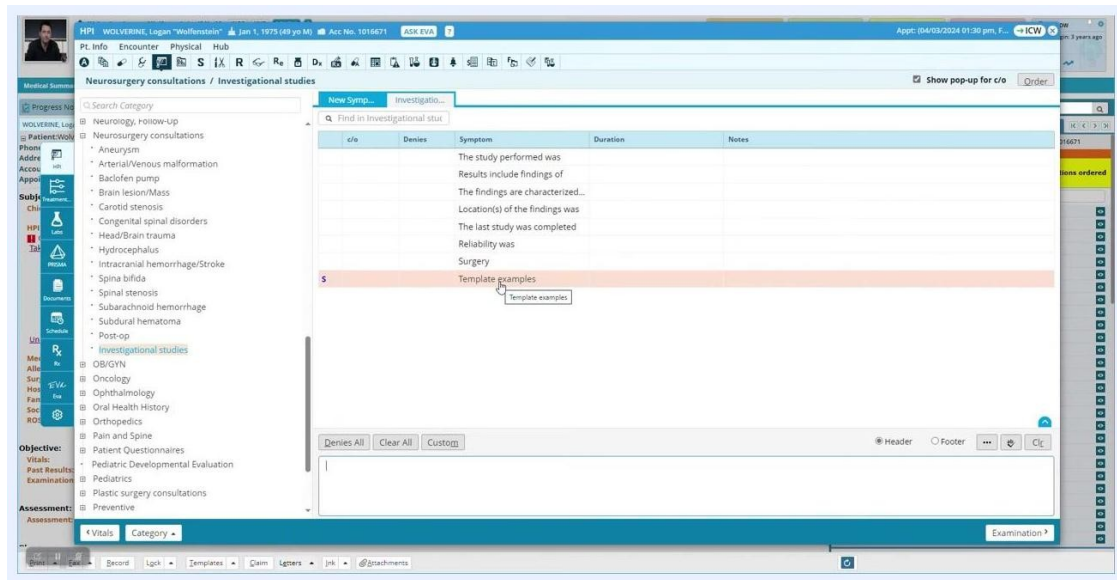
Click on the **Template examples** entry in the list to open it. The template opens to a blank configuration screen, ready for you to add structured data fields.



Blank configuration screen for the selected structured template, showing columns for Name, Value, and Notes with no fields yet defined

Step 11: Access the custom field creation tool

Locate and click the **Custom** button at the bottom left of the configuration window. If you do not see this button, you likely lack the privileges needed to create structured fields; contact your system administrator if needed.



Cursor hovering over the "Custom" button at the bottom left of the blank template configuration screen

Step 12: Choose the field creation mode

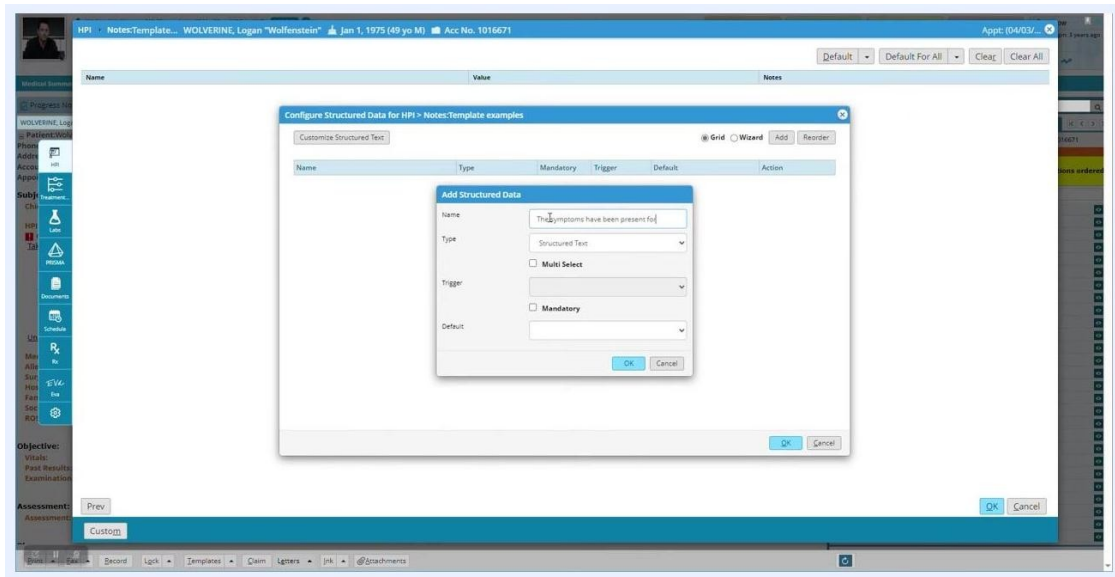
Clicking **Custom** opens a dialog that lets you add structured data fields. Select your preferred mode: **Grid** or **Wizard**. Grid mode is commonly used for efficiency.

Step 13: Add a new structured data field

Click **Add** to begin creating a new field. The **Add Structured Data** dialog appears, prompting you to enter the field details:

- **Name:** Enter the question stem or prompt (for example, "The symptoms have been present for").
- **Type:** Select the type of structured data — Structured Text, Numeric, Date, Boolean, Date (mm/yyyy), or Date (yyyy). For this example, select **Structured Text**.
- **Multi Select:** Check this box to allow multiple selections, or leave it unchecked for single entry.
- **Trigger:** Optionally set a trigger if needed.
- **Mandatory:** Check this box if the field must be completed.

- **Default:** Optionally enter a default value.



Add Structured Data dialog open, with "Structured Text" selected as the type and the name field being filled with "The symptoms have been present for"

After entering all required information, click **OK** to save the field. It now appears in the list of structured data fields for your template.

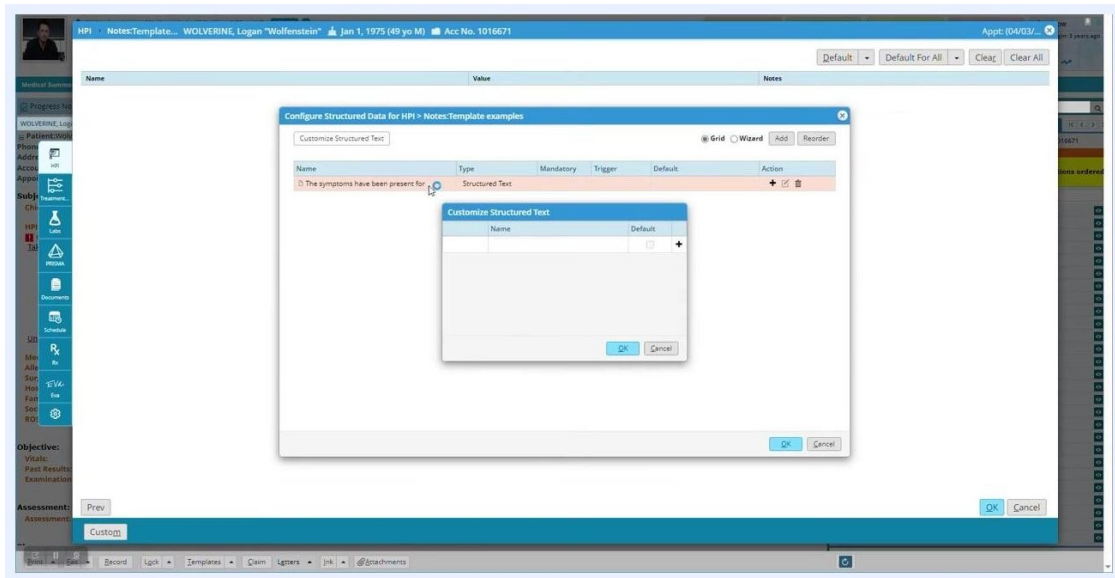


Note: Repeat this process to add additional structured data fields as needed. Use clear, descriptive names for each field to ensure accurate data collection.

Build a selectable list of answers

Step 14: Access the structured text customization

After saving, the new field "The symptoms have been present for" appears in the list of structured data fields. Click on it to highlight it, then click **Customize Structured Text** to define the selectable answers.



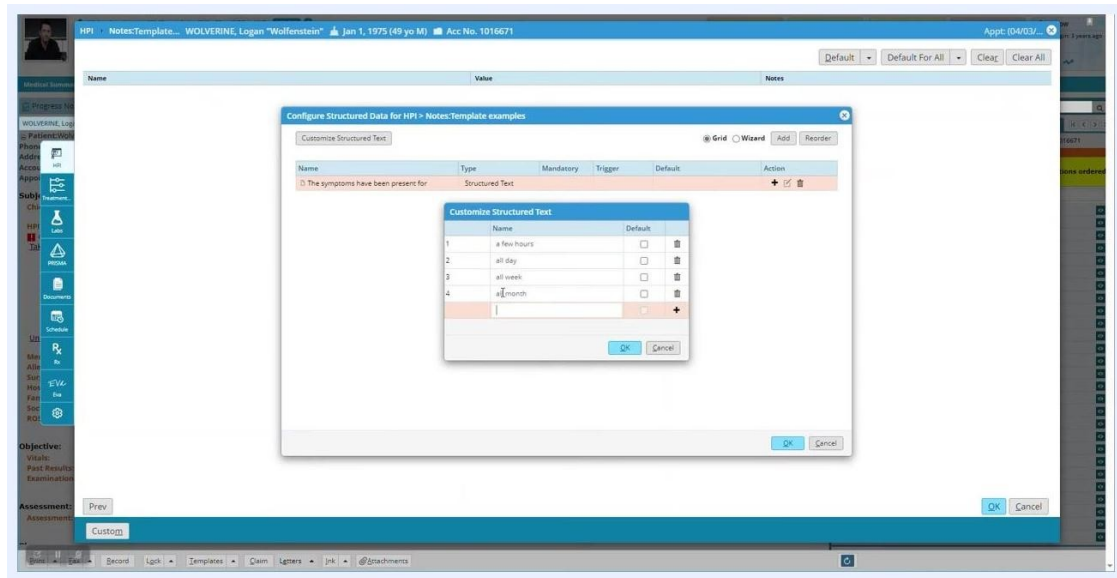
Structured data field "The symptoms have been present for" highlighted, with the empty "Customize Structured Text" dialog open

Step 15: Create the list of structured text answers

In the **Customize Structured Text** dialog, enter each possible answer as a separate row using the + button. For this example, add:

- a few hours
- all day
- all week
- all month
- all year

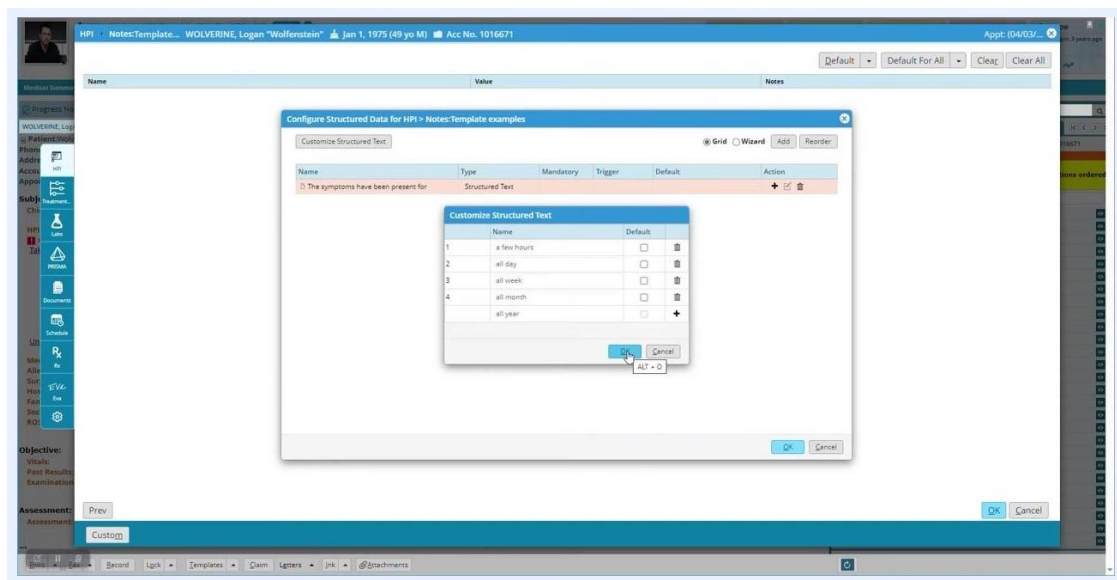
Optionally, check the **Default** box next to an answer if you want it pre-selected when the field is presented.



Customize Structured Text dialog with answers "a few hours", "all day", "all week", "all month", and "all year" entered as options

Step 16: Finalize and save the structured text list

Review your list for accuracy. You can remove an answer by clicking the trash can icon next to it, edit any answer's text directly in the list, or continue adding options as needed. Click **OK** to save the list.



Customize Structured Text dialog showing the list of answers with the "OK" button being clicked to save

Confirm that the field "The symptoms have been present for" now includes your structured text list. It is ready for use in your template, letting users select one duration from the list when completing the HPI.



Note: You can return to the **Customize Structured Text** dialog at any time to edit, add, or remove answer options as your template evolves. Use clear, concise answer choices for accurate and efficient data entry.

Configure structured data for HPI

Step 17: Open the Configure Structured Data for HPI window

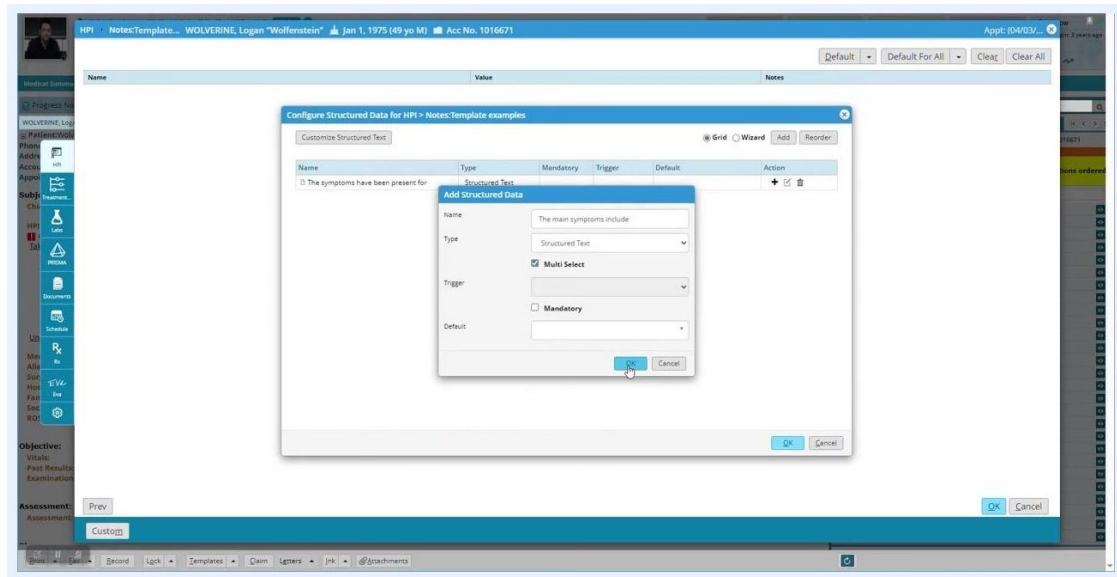
The **Configure Structured Data for HPI** window displays a list of structured data fields for the HPI section, including the existing field "The symptoms have been present for" (Type: Structured Text). Click **Add** to create a new structured data field; the **Add Structured Data** dialog appears.

Step 18: Create a multi-select structured text field

In the **Add Structured Data** dialog, enter:

- **Name:** "The main symptoms include"
- **Type:** Structured Text
- **Multi Select:** Check this box to allow multiple options to be chosen (optional)
- **Mandatory:** Check this box if the field must be completed (optional)

Click **OK** to save the new field.



Add Structured Data dialog with "The main symptoms include," Structured Text, Multi Select option, and OK button highlighted

Confirm that the new field appears in the list with "Structured Text (Multi Select)" as its type.

Step 19: Customize the multi-select field options

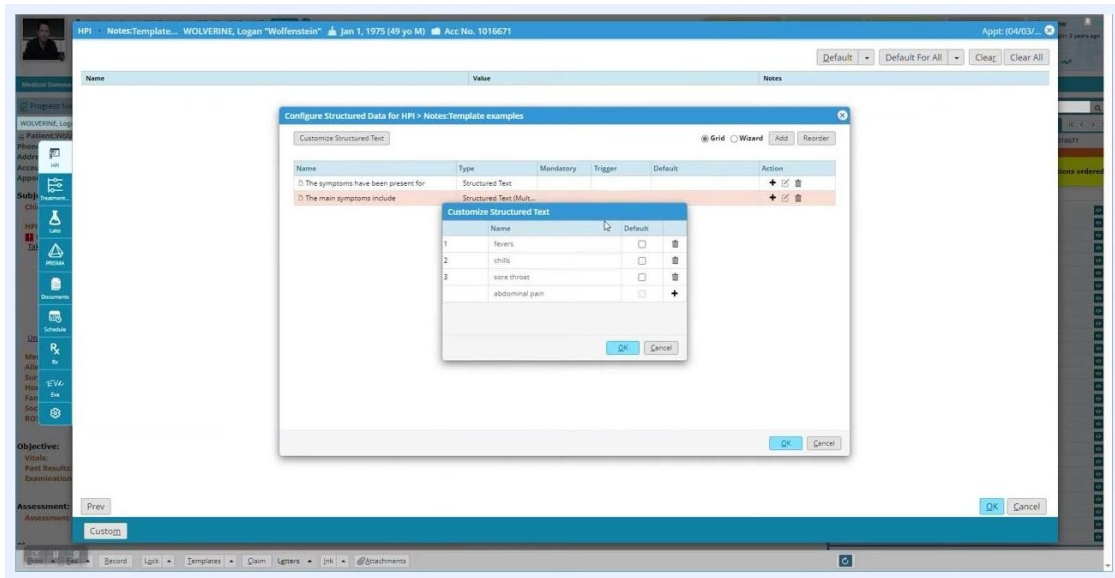
Highlight the new field "The main symptoms include" and click the + icon under the **Action** column to customize its options.

Step 20: Enter the list of multi-select options

In the **Customize Structured Text** dialog, enter the following options:

- fevers
- chills
- sore throat
- abdominal pain

Optionally set any option as the default by checking its corresponding box, then click **OK** to save the options.



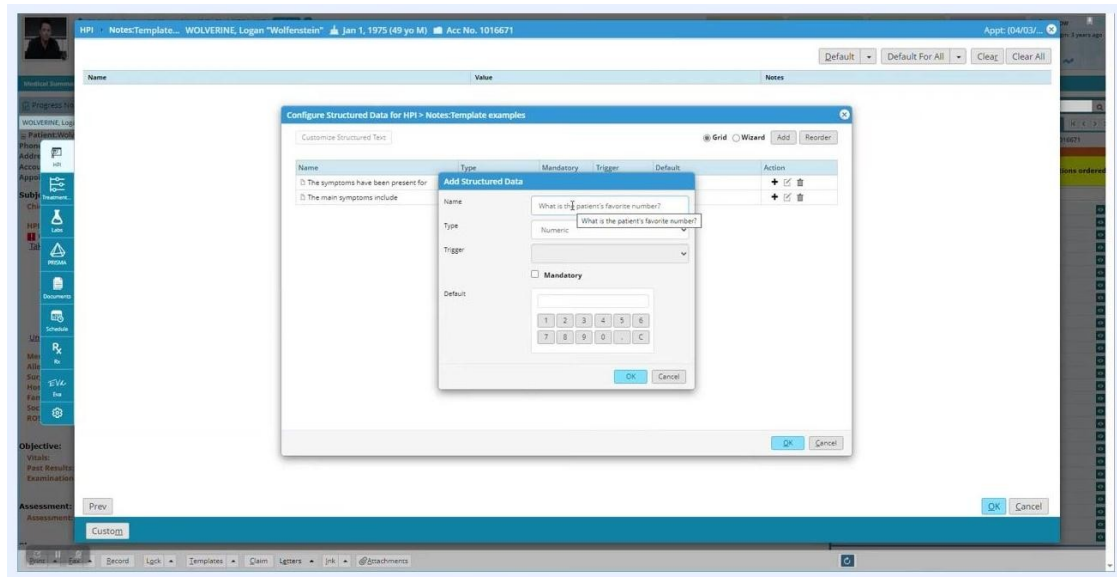
Customize Structured Text dialog showing options: fevers, chills, sore throat, abdominal pain

Step 21: Add a numeric field

Click **Add** again. In the **Add Structured Data** dialog, enter:

- **Name:** "What is the patient's favorite number?"
- **Type:** Numeric (select from the dropdown menu)
- **Mandatory:** Check this box if required (optional)
- **Default:** Enter a default value using the numeric keypad (optional)

Click **OK** to save the new field.



Add Structured Data dialog with "What is the patient's favorite number?," Numeric type, and numeric keypad visible

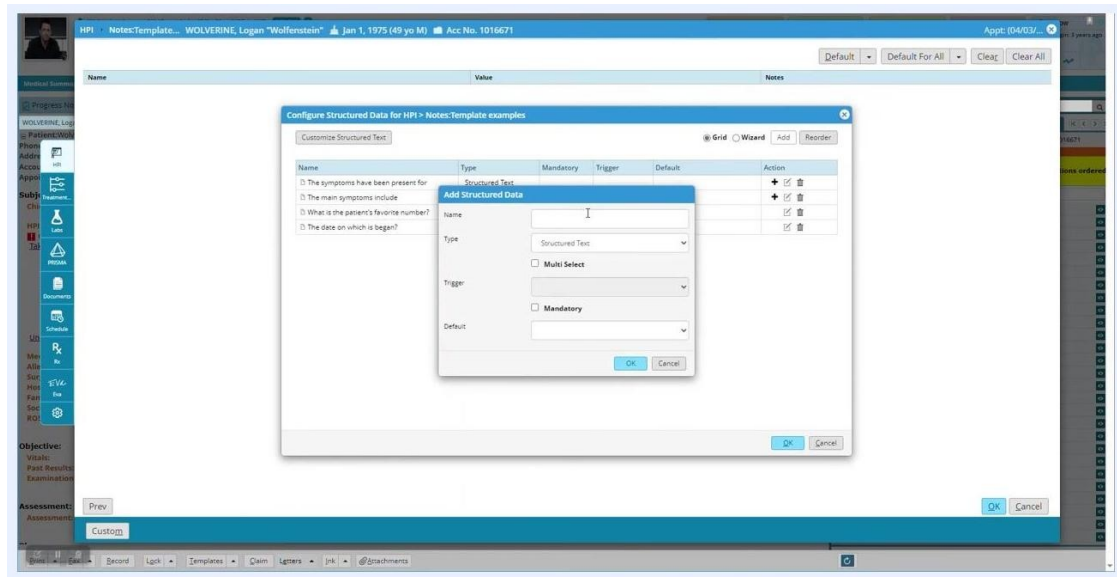
Note: For numeric fields, you can phrase the prompt as a question (for example, "What is the patient's favorite number?") rather than a sentence fragment.

Step 22: Add a date field

Click **Add** again. In the **Add Structured Data** dialog, enter:

- **Name:** "The date on which is began?"
- **Type:** Date (select from the dropdown menu)
- **Mandatory:** Check this box if required (optional)
- **Default:** Enter a default date if desired (optional)

Click **OK** to save the new field.



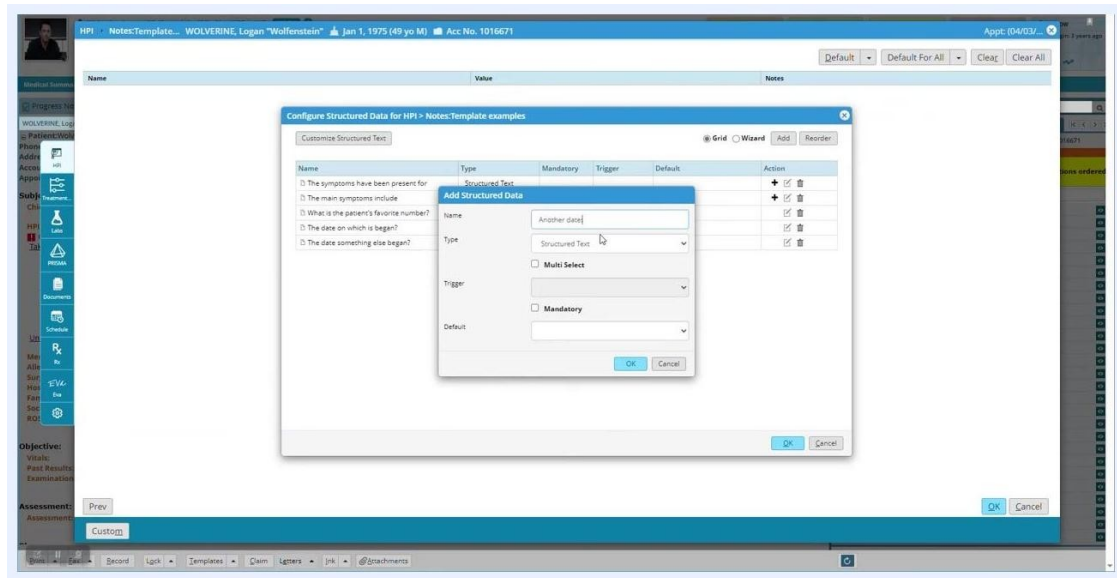
Add Structured Data dialog ready for new entry, with previous fields listed including a date field

Step 23: Add a year-only date field

Click **Add** in the **Configure Structured Data for HPI** window. In the **Add Structured Data** dialog, enter:

- **Name:** "Another date:"
- **Type:** Date (yyyy), which restricts input to year only
- **Mandatory:** Check this box if required (optional)

Click **OK** to save the new field, and confirm it appears in the list with type "Date (yyyy)".



Add Structured Data dialog with "Another date:," Date (yyyy) type selected, and OK button visible

Step 24: Review the date field options

Your template now includes three different date options, each allowing a different level of specificity:

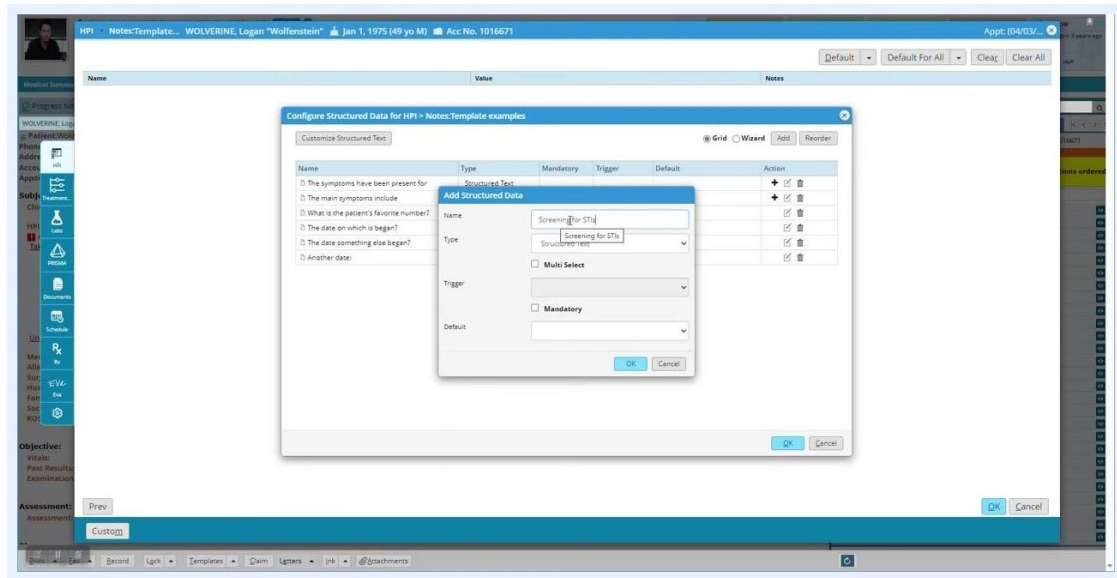
- "The date on which is began?" (Type: Date)
- "The date something else began?" (Type: Date (mm/yyyy))
- "Another date:" (Type: Date (yyyy))

Step 25: Add a Boolean field for screening

Click **Add** again. In the **Add Structured Data** dialog, enter:

- **Name:** "Screening for STIs"
- **Type:** Boolean (select from the dropdown menu)
- **Default:** No
- **Mandatory:** Check this box if required (optional)

Click **OK** to save the new field, and confirm it appears in the list with type "Boolean" and default "No".



Add Structured Data dialog with "Screening for STIs," Boolean type selected, and default set to No

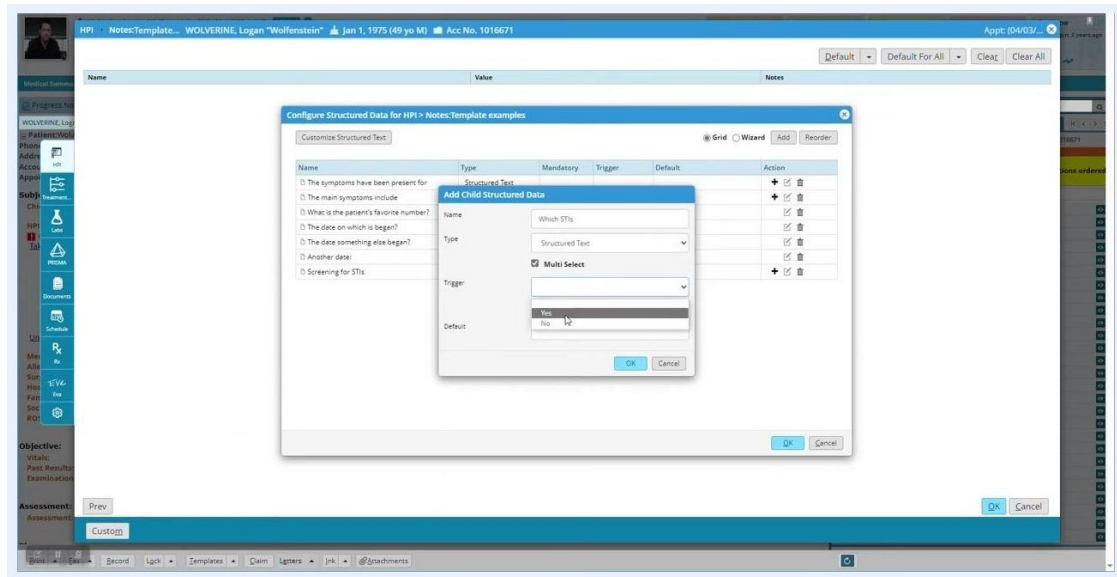
Add conditional child fields

Step 26: Add a child field triggered by the Boolean field

Highlight the "Screening for STIs" field in the list and click the + icon under the **Action** column to add a child structure. In the **Add Child Structured Data** dialog, enter:

- **Name:** "Which STIs"
- **Type:** Structured Text
- **Multi Select:** Check this box to allow multiple options
- **Trigger:** Yes, so this field only appears when "Screening for STIs" is answered "Yes"
- **Mandatory:** Check this box if required (optional)

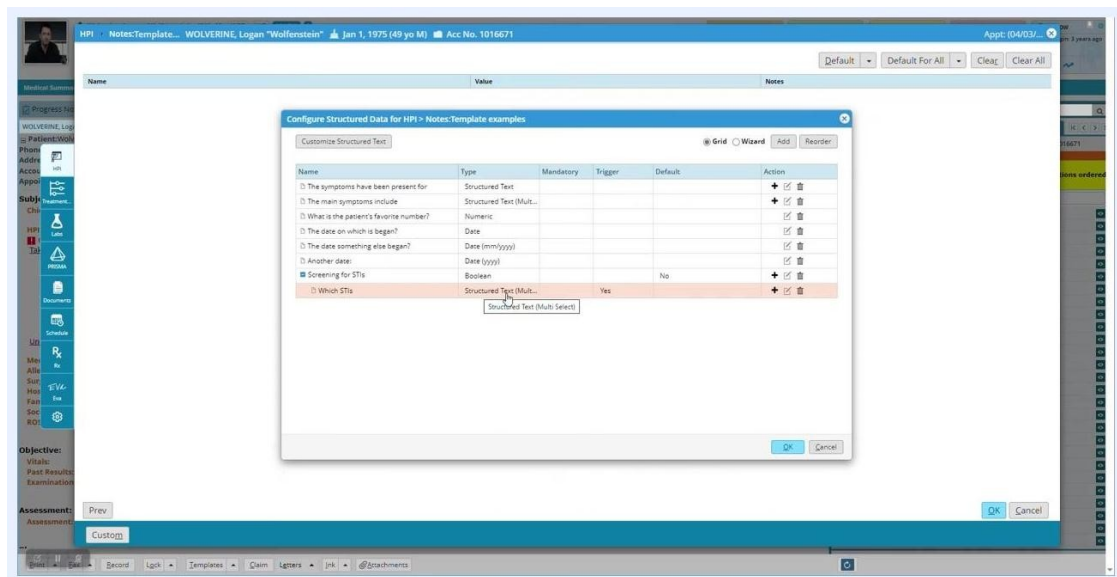
Click **OK** to save the child field.



Add Child Structured Data dialog with "Which STIs," Structured Text, Multi Select, and Trigger set to Yes

Step 27: Confirm the child field is nested correctly

Verify that "Which STIs" appears indented under "Screening for STIs" in the list, with the type displayed as "Structured Text (Multi Select)" and the trigger as "Yes".

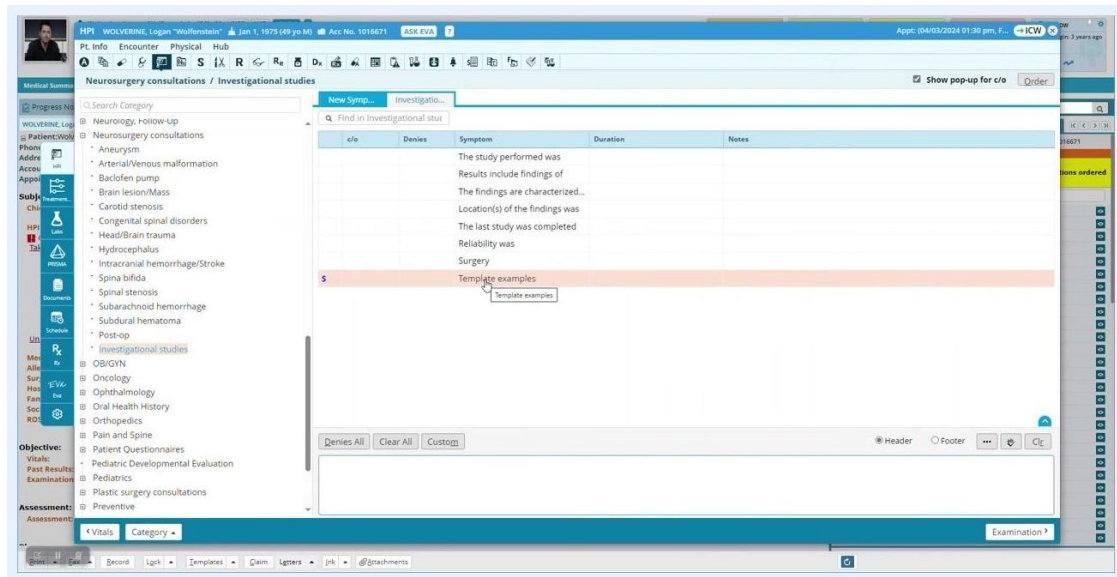


Configure Structured Data for HPI window showing "Screening for STIs" with child field "Which STIs" (Structured Text, Multi Select, Trigger: Yes)

Step 28: Add another child field under the same Boolean field
Highlight "Screening for STIs" again and click the **+** icon under the **Action** column. In the **Add Child Structured Data** dialog, enter:

- **Name:** "Do you currently use birth control or protection"
- **Type:** Boolean
- **Trigger:** Yes, so this field only appears when "Screening for STIs" is answered "Yes"
- **Mandatory:** Check this box if required (optional)
- **Default:** No

Click **OK** to save the new child field.



Add Child Structured Data dialog with "Do you currently use birth control or protection," Boolean type selected, Trigger set to Yes, Mandatory checked, and Default set to No

Step 29: Review the updated structured data list

Confirm that "Do you currently use birth control or protection" is now nested under "Screening for STIs," with type "Boolean", trigger "Yes", and default "No".

Step 30: Return to the main template screen

Click **OK** in the **Configure Structured Data for HPI** window to save your changes. You return to the main template screen, where all structured data fields are listed.

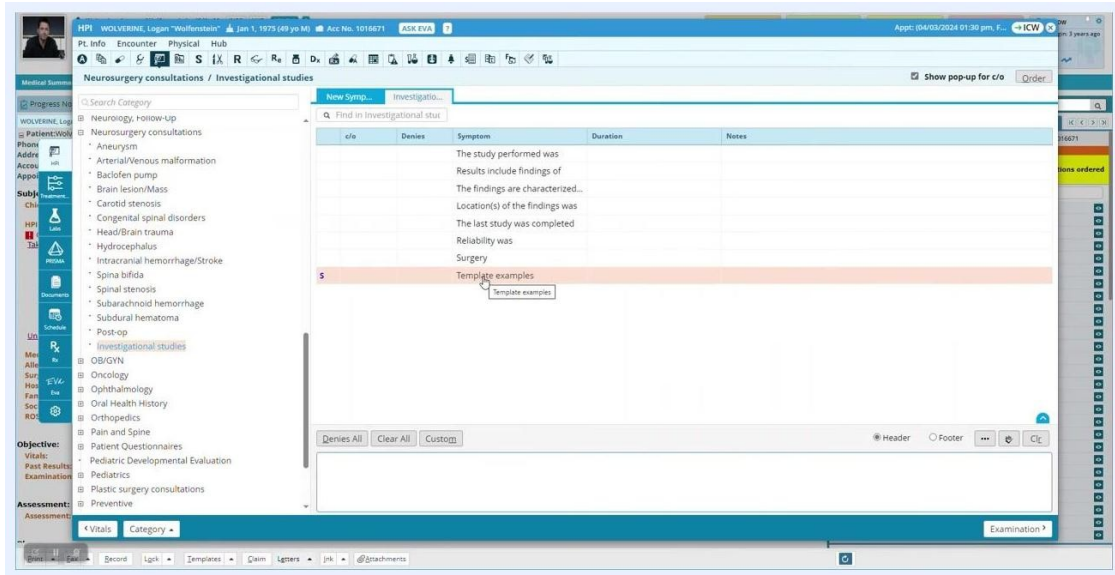
c/o	Denies	Symptom	Duration	Notes
		The study performed was		
		Results include findings of		
		The findings are characterized...		
		Location(s) of the findings was		
		The last study was completed		
		Reliability was		
		Surgery		
		Template examples		

Main template screen showing structured data fields including "The symptoms have been present for," "The main symptoms include," "What is the patient's favorite number?," "The date on which is began?," "The date something else began?," "Another date:," and "Screening for STIs"

Enter data into the structured template

Step 31: Access the structured data entry screen

In the main template list, click anywhere on the "Template examples" row to open the structured data entry screen.



Template examples row highlighted, cursor hovering, ready to open the structured data entry screen

Step 32: Enter data into structured fields

For "The symptoms have been present for," enter a value such as "a few hours." For "The main symptoms include," select multiple symptoms from the dropdown, such as "chills" and "sore throat." For "What is the patient's favorite number?," enter a numeric value (for example, "101") using the on-screen number pad and click **OK**.

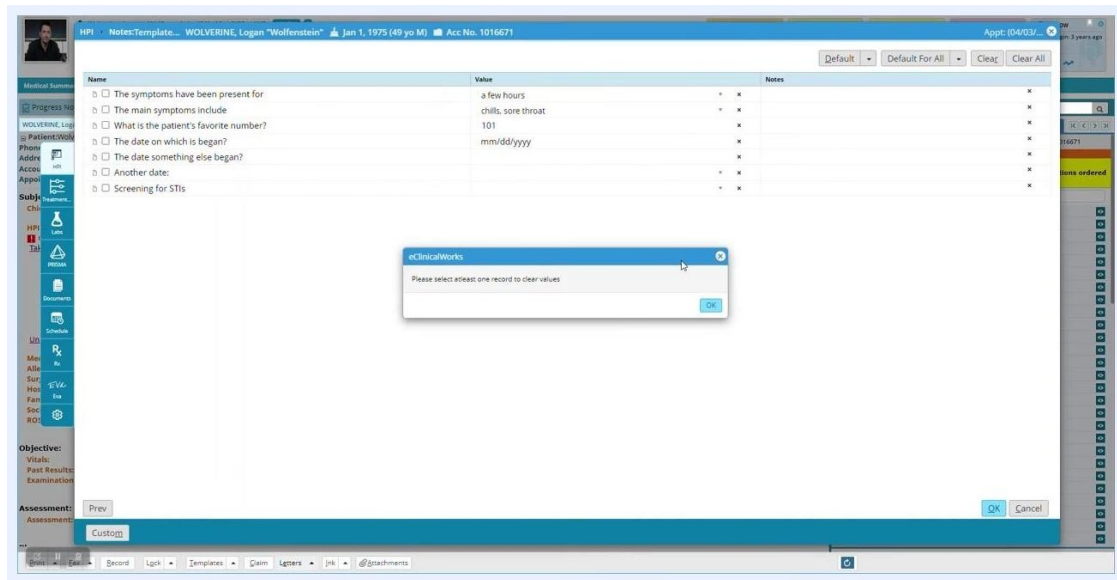
c/o	Denies	Symptom	Duration	Notes
		The study performed was		
		Results include findings of		
		The findings are characterized...		
		Location(s) of the findings was		
		The last study was completed		
		Reliability was		
		Surgery		
		Template examples		

Structured data entry screen with fields populated: "a few hours," "chills, sore throat," and a number pad for entering the favorite number

Multi-select fields display a dropdown with checkboxes for each option, while numeric fields display an on-screen number pad for entry.

Step 33: Handle the clear-values prompt

If you attempt to clear values without selecting a record, a dialog box appears stating "Please select at least one record to clear values." Click **OK** to close the dialog box.



Structured data entry screen with a pop-up dialog from eClinicalWorks stating "Please select at least one record to clear values," with the main template fields and current values visible in the background

Return to the HPI section and use Click Through

Step 34: Return to the HPI section

Close the current window or dialog to return to the HPI section. The screen displays the "Neurosurgery consultations / Investigational studies" template builder. The left panel lists categories such as Neurology, Neurosurgery consultations, and Investigational studies, while the main panel shows a table with columns c/o, Denies, Symptom, Duration, and Notes, along with example symptoms and template text such as "The study performed was," "Results include findings of," and "The symptoms have been present for a few hours."

The screenshot shows the EHR template builder interface for a patient named Logan Wolfenstein. The left sidebar lists categories: Chief Complaints, HPI, Investigational studies, and Template examples. The main panel displays the 'Investigational studies' template with a table for symptoms and notes. The right sidebar shows a list of 'My Favorite Templates' and a warning message: 'Please manually check all copied/merged template data for completeness including potential interactions for all medications ordered from templates.'

Chief Complaints:

- Template building

HPI:

- Investigational studies
- Template examples

Current Medications:

- Estradiol 1 MG Tablet 1 tablet Orally Once a day.
- Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
- Pericort 5-325 MG Tablet 1 tablet Orally every 6 hrs pm pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
- Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
- Loxapram 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.

Medical History:

- Allergies/Intolerances:
- Surgical History:
- Hospitalization:
- Family History:
- Social History:
- ROS:

Objective:

- Vitals:
- Past Results:
- Examination:

Assessment:

Template builder for Investigational studies with symptom templates and categories visible

After returning, the HPI displays "Investigational studies" and "Template examples" under the chief complaint, with the note stating "The symptoms have been present for a few hours." The right panel shows a warning to manually check all copied or merged template data for completeness, including potential medication interactions, and the Current Medication section lists several medications with dosages and instructions.

Step 35: Ensure at least one question has an answer

The HPI section displays the template example as long as at least one question is answered, even if it is not the most important one. The note "The symptoms have been present for a few hours" is visible under HPI.

The screenshot shows a medical chart for a patient named Wolverine, Logan (Wolfenstein). The HPI section is highlighted, showing a template example: "The symptoms have been present for a few hours". A red box highlights this text, indicating it is the answer to a question. The chart also displays various other sections like Subjective, Objective, and Assessment, as well as a list of templates on the right side.

HPI section showing the template example and an answered question

Step 36: Open the Click Through dialog

Click anywhere on the black template line in the HPI section. This opens the **Click Through** dialog, displaying all questions from the template on a single screen along with the patient's name and encounter details. Tabs are available for HPI, ROS, Examination, Procedures, and Preventive Medicine, with "Investigational studies" selected as the active template. Questions include:

- "The symptoms have been present for" with options: a few hours, all day, all week, all month, all year
- "The main symptoms include" with options: fevers, chills, sore throat, abdominal pain
- "What is the patient's favorite number?"
- "The date on which is began?" (with date picker)
- "The date something else began?" (MM/YYYY)
- "Another date:" (YYYY)

- "Screening for STIs" (Yes/No)

Wolverine Logan Wolfenstein, 49 Y, M, RPO, HSB, AUSA 3

1992 E 1390 W, Orem, UT 84097
 8 01-01-1975 (L 01-01-0244) | 8 01-410-0844
 8 01-410-0844
 8 01-410-0844

Medical Summary - CDS | Re | Lab | DI | Procedures | Growth Chart | Immun | Tmg | Encounters | Patient Docs | Plans/Notes | Notes

Progress Note | Scribe | Orders | h Insights | Quick Order

WOLVERINE Logan Wolfenstein Jan 1, 1975 (49 yr M) Acc No: 1016671

Patient: Wolverine Logan Preferred Name: Wolfenstein DOB: 01/01/1975 Age: 49 Y Sex: Male
 Phone: 801-410-0844 Primary Insurance: SELF PAY Payer ID: self
 Address: 1392 E 1390 W, Orem, UT 84097
 Account Number: 1016671 Encounter Date: 04/03/2024 Provider: Easton D Jackson, MD
 Appointment Facility: Granger Medical Wasatch - PM & Internal Medicine

Subjective:
 Chief Complaint(s) | Template building
 HPI | Investigational studies | Template examples
 The symptoms have been present for a few hours
 Current Medications
 Etoricoxib 1 MG Tablet 1 tablet Orally Once a day.
 Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
 Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 Hydromorphone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally Once a day.
 Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
 Lovastatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 Unknown
 Hydromorphone-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 Medical History
 Allergies/Intolerance:
 Surgical History:
 Hospitalization:
 Family History:
 Social History:
 ROS:
Objective:
 Vitals:
 Past Results:
 Examination:
Assessment:

Revisions | Back | Log | Templates | Data | Letters | Jk | @Attachments

WOLVERINE Logan Wolfenstein Jan 1, 1975 (49 yr M) Acc No: 1016671

Right Panel data last modified on: 03/29/2024 02:58 PM

Please manually check all Copied/Imported Template data for completeness including potential interactions for all Medications ordered from Templates.

My Favorite Templates

- CE BPPV
- ED Acute Visc Note
- ED COVID visit
- ED Group
- ED Fall single family
- ED H Pylori Amox/Clarith/Omepr/Pepto
- ED Torsion
- ED Training Test
- ED Abdominal pain
- ED Allergies
- ED Ankle Sprain, left
- ED Ankle Sprain, right
- ED Asthma Exacerbation-Urgent Care
- ED Bell's Palsy
- ED Boxer's Fracture, left
- ED Boxer's Fracture, right
- ED Bronchitis
- ED Bronchitis RSV Positive
- ED Bronchitis
- ED Cerumen impaction w/ irrigation
- ED Chest Pain
- ED Concussion
- ED Conjunctivitis, bilateral
- ED Conjunctivitis, left
- ED Conjunctivitis, right
- ED COVID-19 in House PCR Test
- ED COVID-19 Respiratory Panel (COVID, Flu A/B, RSV)

Dialog showing all template questions for Investigational studies, with options and fields

Step 37: Select multiple answers

For "The symptoms have been present for," select an option such as "all week." For "The main symptoms include," select multiple symptoms such as "fevers," "chills," "sore throat," and "abdominal pain."

Wolverine Logan Wolfenstein, 49 Y, M, RPO, HSB, AUSA 3

1992 E 1390 W, Orem, UT 84097
 8 01-01-1975 (L 01-01-0244) | 8 01-410-0844
 8 01-410-0844
 8 01-410-0844

Medical Summary - CDS | Re | Lab | DI | Procedures | Growth Chart | Immun | Tmg | Encounters | Patient Docs | Plans/Notes | Notes

Progress Note | Scribe | Orders | h Insights | Quick Order

WOLVERINE Logan Wolfenstein Jan 1, 1975 (49 yr M) Acc No: 1016671

Patient: Wolverine Logan Preferred Name: Wolfenstein DOB: 01/01/1975 Age: 49 Y Sex: Male
 Phone: 801-410-0844 Primary Insurance: SELF PAY Payer ID: self
 Address: 1392 E 1390 W, Orem, UT 84097
 Account Number: 1016671 Encounter Date: 04/03/2024 Provider: Easton D Jackson, MD
 Appointment Facility: Granger Medical Wasatch - PM & Internal Medicine

Subjective:
 Chief Complaint(s) | Template building
 HPI | Investigational studies | Template examples
 The symptoms have been present for a few hours
 Current Medications
 Etoricoxib 1 MG Tablet 1 tablet Orally Once a day.
 Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
 Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 Hydromorphone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally Once a day.
 Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
 Lovastatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 Unknown
 Hydromorphone-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 Medical History
 Allergies/Intolerance:
 Surgical History:
 Hospitalization:
 Family History:
 Social History:
 ROS:
Objective:
 Vitals:
 Past Results:
 Examination:
Assessment:

Revisions | Back | Log | Templates | Data | Letters | Jk | @Attachments

WOLVERINE Logan Wolfenstein Jan 1, 1975 (49 yr M) Acc No: 1016671

Right Panel data last modified on: 03/29/2024 02:58 PM

Please manually check all Copied/Imported Template data for completeness including potential interactions for all Medications ordered from Templates.

My Favorite Templates

- CE BPPV
- ED Acute Visc Note
- ED COVID visit
- ED Group
- ED Fall single family
- ED H Pylori Amox/Clarith/Omepr/Pepto
- ED Torsion
- ED Training Test
- ED Abdominal pain
- ED Allergies
- ED Ankle Sprain, left
- ED Ankle Sprain, right
- ED Asthma Exacerbation-Urgent Care
- ED Bell's Palsy
- ED Boxer's Fracture, left
- ED Boxer's Fracture, right
- ED Bronchitis
- ED Bronchitis RSV Positive
- ED Bronchitis
- ED Cerumen impaction w/ irrigation
- ED Chest Pain
- ED Concussion
- ED Conjunctivitis, bilateral
- ED Conjunctivitis, left
- ED Conjunctivitis, right
- ED COVID-19 in House PCR Test
- ED COVID-19 Respiratory Panel (COVID, Flu A/B, RSV)

Dialog with multiple options selected for symptoms and duration

Step 38: Enter numeric and date values

For "What is the patient's favorite number?," enter "22." For "The date on which is began?," use the date picker to select "04/02/2024." For "The date something else began?," enter "06/2024."

The screenshot shows a medical software interface for a patient named Logan Wolfenstein. A dialog box is open with the following fields and values:

- Template examples:** ☒ all week, ☐ all month, ☐ all year
- The main symptoms include:** ☒ fevers, ☒ chills, ☒ sore throat, ☐ abdominal pain
- What is the patient's favorite number?:** 22
- The date on which is began?:** (Date picker open showing April 2, 2024)
- The date something else began?:** (Date picker open showing April 2, 2024)
- Another date:** (Date picker open showing April 2, 2024)
- Screening for:** ☐ Yes, ☐ No

Dialog with date picker open and fields filled with sample values

Step 39: Enter additional date information

For "Another date," enter "2024" or another relevant year.

The screenshot shows the same medical software interface as before, but with the 'Another date' field filled with the value '2024'. The date picker is still open, and the 'Screening for' field is still set to 'No'.

Dialog with another date field filled and cursor hovering over it

Step 40: Answer the screening question

For "Screening for STIs," select "Yes" as the answer.

The screenshot shows a medical software interface with a patient record for Wolverine, Logan (Wolfeinst, L.). The interface includes a top navigation bar, a left sidebar with tabs like Progress Home, Scribe, Orders, and Insights, and a main content area. A 'Click Through' dialog box is open, displaying a list of symptoms and a 'Screening for STIs' section with a 'Yes' button selected. The right sidebar shows a list of templates and a warning about potential interactions.

Click Through Wolverine, Logan (Wolfeinst, L.) Jan 1, 1975 (49 yo M) Acc No: 1016671

Template examples

The main symptoms include:

- ☒ all year
- ☒ fevers
- ☒ chills
- ☒ sore throat
- ☐ adenovirus pain

What is the patient's favorite number?

22

The date on which it began?

(MM/DD/YYYY) 04/02/2024

The date something else began?

(MM/YYYY) 06/2024

Another date:

(YYYY) 2024

Screening for STIs

☒ Yes

☐ No

OK Cancel ROS

Dialog with "Yes" selected for Screening for STIs

Step 41: Observe branching behavior when changing the answer

Deselect "Yes" and select "No" for "Screening for STIs." The follow-up questions related to STI screening, such as "Which STIs," disappear from the dialog. The system lets you build additional child questions that appear or hide depending on the selected answer.

The screenshot shows a medical chart for a patient named WOLFFSTEIN, Logan (Wolffstein, Logan). The chart includes a 'Medical Summary' tab and a 'Progress Notes' tab. A 'Template building' dialog is open, showing a list of questions and their answers. The questions are: 'The symptoms have been present for all week?', 'The main symptoms include fevers, chills, sore throat', 'What is the patient's favorite number?', 'The date on which is began?', 'The date something else began?', and 'Another date:'. The answers are: 'all week', 'fevers, chills, sore throat', '22', '04/02/2024', '06/2024', and '2024'. The 'Screening for STIs' question is selected, and the 'No' option is chosen. The 'Current Medications' section lists various drugs, including Extralid, Lisinopril, Percocet, and others. The 'Medical History' section lists conditions like Allergies, Intolerance, Surgical History, Hospitalization, Family History, and Social History. The 'Objective' section is also visible.

Dialog with "No" selected for Screening for STIs, with follow-up questions hidden

Step 42: Review how answers populate the HPI

After completing the template dialog and clicking **OK**, the HPI section updates to display all the answers you entered:

- "The symptoms have been present for all week"
- "The main symptoms include fevers, chills, sore throat"
- "What is the patient's favorite number? 22"
- "The date on which is began? 04/02/2024"
- "The date something else began? 06/2024"
- "Another date: 2024"

- "Screening for STIs: No"

The screenshot displays a medical chart for a patient named Wolverine, Logan (Wolfenstein, J., 49 Y, M). The chart includes a navigation bar at the top with tabs for Medical Summary, CDS, Rx, Labs, Orders, Procedures, Growth Chart, Immun, Tmj, Encounters, Patient Data, Plans/Notes, and Notes. The main content area shows the patient's HPI section, which has been updated with data from a template. The HPI text reads: "The symptoms have been present for all week. The main symptoms include fevers, chills, sore throat. What is the patient's favorite number? 22. The date on which is began? 04/02/2024. The date something else began? 06/20/2024. Another date: 2024. Screening for STIs: No". Below the HPI, the Current Medication section lists several medications, including Estradiol, Lisinopril, Percocet, HYDROcodone-Acetaminophen, and Lovastatin. The Medical History section lists various conditions, including Allergies/Intolerance, Surgical History, Hospitalization, Family History, Social History, and RDS. The Objective section is also visible at the bottom.

HPI section updated with all entered answers from the template

Correct a field's data type

Step 43: Identify a configuration error

Review the HPI section and notice that the answer for "Would you like to be screened today?" is incorrectly set as a date, when the question should only allow "Yes" or "No" answers. Open the **Configure Structured Data for HPI** dialog and locate this row in the configuration grid; the Type column is set to "Date," which is incorrect.

The screenshot displays a medical record interface for a patient named WOLVERINE, Logan. The HPI (History of Present Illness) section is visible, showing a list of symptoms and a question "Would you like to be screened today?" with a date "04/02/2024" entered as the answer. The interface also shows a list of medications and a list of templates on the right side.

Subjective:

- Chief Complaint(s):
 - Template building
- HPI:
 - Investigational studies:
 - The symptoms have been present for all week.
 - The main symptoms include fevers, chills, sore throat.
 - What is the patient's favorite number? 22
 - The date on which it began? 04/02/2024
 - The date something else began? 06/2024
 - Another date: 2024
 - Screening for STIs: No

Current Medication:

- Tablets:
 - Estradiol 1 MG Tablet 1 tablet Orally Once a day.
 - Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
 - Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 - Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - Hydrocodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
 - Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
 - Lovastatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
 - Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Unknown:
 - Hydrocodone-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.

Medical History:

- Allergies/Intolerance:
- Surgical History:
- Hospitalization:
- Family History:
- Social History:
- RDS:

Objective:

Vitals:

HPI section showing "Would you like to be screened today?" with an incorrect data type

Step 44: Change the data type to Boolean

Click the edit (pencil) icon in the **Action** column for "Would you like to be screened today?" In the **Modify Structured Data** dialog, change the **Type** from "Date" to "Boolean" using the dropdown menu, then click **OK** to confirm.

The screenshot displays the Epic EMR interface for a patient named WOLVERINE, Logan. The 'Modify Structured Data' dialog is open, showing the 'Properties' tab. The 'Type' dropdown is set to 'Boolean'. The 'Value' field is empty. The 'Action' column shows a pencil icon for editing. The background shows the patient's medical summary, including demographics, subject, and current medications.

Modify Structured Data dialog with a dropdown to change the type from Date to Boolean

Step 45: Save the configuration and verify the correction

Click **OK** in the configuration dialog to save your changes. Return to the progress note and click on the template line to reopen the dialog, and confirm that "Would you like to be screened today?" now presents a Yes/No (Boolean) input instead of a date picker.

Step 46: Test the branching logic

Select "Yes" for "Screening for STIs" and observe that the appropriate follow-up questions appear. Select "No" for "Screening for STIs" and verify that "Would you like to be screened today?" now displays the correct Boolean input.

The screenshot shows a medical chart for a patient named WOLVERINE, Logan (Wolffenstein, J., 49 Y, M). The chart includes a header with patient information, a navigation bar, and a main content area. The HPI section is highlighted, showing a list of symptoms and a screening question. The screening question is "Screening for STIs" with a Boolean input of "No". The HPI section also includes a list of medications and a list of lab tests. The right sidebar shows a list of templates and a list of lab tests.

Subjective:

- Chief Complaint(s):
 - Template building
- HPI:
 - Investigational studies
 - The symptoms have been present for all week
 - The main symptoms include: fevers, chills, sore throat
 - What is the patient's favorite number? 22
 - The date on which it began? 04/02/2024
 - The date something else began? 06/2024
 - Another date: 2024/2
 - Screening for STIs: No
- Current Medication:
 - Taking
 - Estradiol 1 MG Tablet 1 tablet Orally Once a day.
 - Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
 - Peroctol 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally every 6 hrs.
 - Loxapram 1 MG Tablet 1 tablet with the evening meal Orally Once a day.
 - Loxapram 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
 - Loxapram 1 MG Tablet 1 tablet with the evening meal Orally Once a day.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Lab tests:
 - HYDROcodone-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.

Objective:

Vitals:

Record Log Print Templates Claim Letters Jnk @trashments

HPI section after correction, showing branching logic and Boolean input for the screening question

While this particular example may not be practical for real-world notes, it demonstrates how to create custom structured templates with branching logic that display or hide questions based on patient responses, improving workflow efficiency.

The screenshot shows a medical chart template for a patient named Wolverine, Logan (Woffenstein, L.). The template includes a header with patient information, a progress note section, and a right-hand sidebar with a list of favorite templates. The progress note section is titled "HPI" and contains a series of questions with branching logic. The questions are: "The symptoms have been present for all week", "The main symptoms include fever, chills, sore throat", "What is the patient's favorite number? 22", "The date on which it began? 04/02/2024", "The date something else began? 06/2024", "Another date: 2024", and "Screening for STIs: No". The "Current Medication" section lists several medications, including Extradol, Lialapril, Percocet, oxycodone-acetaminophen, and Unasyn. The "Medical History" section lists various conditions, including Allergies/Intolerance, Surgical History, Hospitalization, Family History, Social History, and RDS. The right-hand sidebar contains a list of favorite templates, including CE BPPV, ECG Acute Vask Note, ECG COVID visit, ECG Group, ECG Fall single family, ECG H Pylon Amou/Clearth/Omega/Pepto, ECG Tonsillitis, ECG Training Test, ECG Abdominal pain, ECG Allergies, ECG Ankle Sprain, left, ECG Ankle Sprain, right, ECG Asthma Exacerbation Urgent Care, ECG Bells Palsy, ECG Bowers fracture, left, ECG Bowers fracture, right, ECG Bronchitis, ECG Bronchitis RSV Positive, ECG Bronchitis, ECG Cerumen impaction w/ irrigation, ECG Chest Pain, ECG Concussion, ECG Conjunctivitis, bilateral, ECG Conjunctivitis, left, ECG Conjunctivitis, right, ECG COVID-19 in House PCR Test, and ECG COVID-19 Respiratory Panel (COVID, Flu A/B, RSV).

HPI section with updated answers and branching logic, illustrating template flexibility

Use an existing favorite template

Step 47: Select a different template

In the **My Favorite Templates** panel, scroll to find "GMC UTI with hematuria" and select it to see how different templates can be pulled into the note.

The screenshot displays a medical chart for a patient named Wolverine, Logan (Wolfenstein, L.). The chart includes a header with patient information, a navigation bar, and a main content area. The main content area is divided into sections: Subjective, HPI, and UTI. The UTI section is currently selected and shows a list of symptoms and signs. The right-hand side of the chart features a panel titled "My Favorite Templates" which lists various templates. The template "GMC UTI with hematuria" is highlighted in blue, indicating it is selected for use.

Template list with "GMC UTI with hematuria" highlighted for selection

The "UTI" section is added to the HPI, with details such as "Urinary Tract Infection," "The patient complains of UTI symptoms for 2–3 days," "Symptoms include frequency, urgency, pain with urination, blood in the urine," "No mid back pain," and "History of prior UTIs: occasional UTIs." These details are automatically filled based on the template configuration.

Step 48: Use templates to save time

Rather than manually editing each answer, use structured templates to quickly populate notes with relevant information. This approach saves time and ensures consistency in documentation.

The screenshot displays a medical chart for a patient named Wolverine, Logan (Woffenstein, J.). The HPI section is populated with template-driven text and manually entered data. The template text includes: "The symptoms have been present for all week", "The main symptoms include: fever, chills, sore throat", "What is the patient's favorite number? 22", "The date on which it began? 04/02/2024", "The date something else began? 06/2024", "Another date: 2024", "Screening for STIs: No", "Would you like to be screened today? No". The manually entered data includes: "UTI", "The patient complains of UTI symptoms for 2-3 days", "The main symptoms include: frequency, urgency, pain with urination, blood in the urine", "The onset of symptoms was: gradual", "The severity of the symptoms is: moderate", "Alleviating factors include: increased fluid intake", "Associated symptoms include: no mid back pain", "History of prior UTIs: occasional UTIs". The right sidebar shows a list of templates under "My Favorite Templates", including: "Etiology", "Acute Visit Note", "COVID visit", "Croup", "Fall single family", "Hypertension/Anxiety/Depression/Pediatric", "Tonsillitis", "Training Test", "Abdominal pain", "Allergies", "Ankle Sprain, left", "Ankle Sprain, right", "Asthma Exacerbation-Urgent Care", "Bell's Palsy", "Bovine Rectum, left", "Bovine Rectum, right", "Bronchitis", "Bronchitis RSV Positive", "Branchitis", "Cervical Impaction of Irrigation", "Chest Pain", "Concussion", "Conjunctivitis, bilateral", "Conjunctivitis, left", "Conjunctivitis, right", "COVID-19 in House PCR Test", "COVID-19 Respiratory Panel (COVID, Flu A/B, RSV)".

HPI section showing both template-driven and manually entered data

Step 49: Review the populated note

Scan the HPI section to ensure all relevant information, such as symptom duration, specific symptoms, and history, is correctly filled in. Confirm that the branching logic and Boolean fields (for example, "Would you like to be screened today?") display the correct input types and responses.

Step 50: Switch between templates as needed

Refer to the **My Favorite Templates** panel on the right to select other templates for different clinical scenarios, and use the search bar at the top of the template panel to find templates efficiently.

Edit a template selection directly from the note

Step 51: Click a single-line answer to reopen its template

Click on a single line in the patient note, such as "History of prior UTIs," to open the associated template. The main screen displays the patient chart with the subjective and objective sections, including HPI, Investigational studies, and Current Medication, while the right panel lists **My Favorite Templates** and a yellow warning to check template data for completeness.

The screenshot shows a medical software interface with a patient chart for WOLVERINE, Logan (Wolfenstein), 49 Y, M. The chart includes sections for Subjective, HPI, Investigational studies, UTI, Current Medication, and Medical History. The right panel displays 'My Favorite Templates' and a yellow warning banner: 'Please manually check all Copied/Imported Template data for completeness including potential interactions for all Medications ordered from Templates.' The bottom of the screen shows navigation buttons: Back, Light, Templates, Drafts, Letters, and Jk.

Patient chart with HPI, Investigational studies, and template list visible; no pop-up template window yet

Step 52: Review and select relevant sections

In the **Click Through** pop-up, the template is set to "Urinary Tract Infection" (UTI), with checkboxes for symptoms (fevers, abdominal pain, malaise, dysuria, nothing else), history of prior UTIs (no prior, occasional, frequent), and relevant surgical history. Leave a section unchecked if you do not want it to appear in the progress note.

The screenshot displays a medical software interface for a patient named Logan Wolfenstein. The patient's information, including DOB (01/01/1975), age (49 Y), sex (Male), and address, is shown at the top. The main area is a progress note editor with a template for "Urinary Tract Infection". The template includes sections for "Subjective", "HPI", "Investigational studies", "Current Medication", and "Medical History". The "Subjective" section contains a list of symptoms with checkboxes: "fevers", "abdominal pain", "malaise", "dysuria", and "nothing else". The "History" section includes checkboxes for "no prior", "occasional", and "frequent" UTIs. The "Medical History" section has checkboxes for various conditions, including "Hypertension", "Diabetes", "Asthma", "Allergies", "Anxiety", "Depression", "Bipolar", "Schizophrenia", "Alcoholism", "Substance Use", "Eating Disorders", "Personality Disorders", "Mental Health", "Physical Health", "Surgical History", "Immunizations", "Travel History", "Social History", "Family History", "Genetics", "Pregnancy History", "Gynecological History", "Urological History", "Endocrine History", "Cardiovascular History", "Respiratory History", "Gastrointestinal History", "Musculoskeletal History", "Neurological History", "Ophthalmological History", "Otolaryngological History", "Dermatological History", "Hematological History", "Immunological History", "Infectious History", "Neoplasia History", "Trauma History", "Toxicology History", "Radiology History", "Laboratory History", "Immunization History", "Travel History", "Social History", "Family History", "Genetics History", "Pregnancy History", "Gynecological History", "Urological History", "Endocrine History", "Cardiovascular History", "Respiratory History", "Gastrointestinal History", "Musculoskeletal History", "Neurological History", "Ophthalmological History", "Otolaryngological History", "Dermatological History", "Hematological History", "Immunological History", "Infectious History", "Neoplasia History", "Trauma History", "Toxicology History", "Radiology History", "Laboratory History".

Template pop-up window for UTI with checkboxes for symptoms, history, and surgical history

Step 53: Update your selections if needed

If you realize a section should be included, such as "prior UTIs," return to the template and check the appropriate box — for example, "occasional UTIs" under "History of prior UTIs." Click **OK** to confirm your selections and update the note.

The screenshot displays a patient chart for WOLVERINE, Logan (Wolfeinstein, L.) in a medical software interface. The patient's information includes DOB: 01/01/1975, Age: 49 Y, Sex: Male, and Address: 1092 E 1890 W, Orem, UT 84097. The chart shows the HPI (History of Present Illness) section with a template building interface. The HPI text includes: "The symptoms have been present for all week. The main symptoms include: fevers, chills, sore throat. What is the patient's favorite number? 22. The date on which it began? 04/02/2024. The date something else began? 06/2024. Another date: 2024. Screening for STIs: No. Should you like to be screened today? No." The HPI section also includes a "UTI" section with a "History of prior UTIs" subsection. The "History of prior UTIs" section includes a "Current Medication" section with a "Taking" subsection. The "Taking" subsection lists: "Extradiol 1 MG Tablet 1 tablet Orally Once a day, Lisinopril 10 MG Tablet 1 tablet Orally Once a day, Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness, HYDROcodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness, HYDROcodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs, Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day, Lovastatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day, oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness, oxycodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness." The right side of the interface shows a list of template selections under "My Favorite Templates". The list includes: CE BPV, ESI Acute Visit Note, ESI COVID visit, ESI Group, ESI Fall single family, ESI H Pylon Amov/Clench/Omepr/Pepso, ESI Tonsillitis, ESI Training Test, ESI Abdominal pain, GMC Allergies, GMC Ankle Sprain, left, GMC Ankle Sprain, right, GMC Asthma Exacerbation-Urgent Care, GMC Back Pain, GMC Biceps fracture, left, GMC Biceps fracture, right, GMC Bronchitis, GMC Bronchitis RSV Positive, GMC Bronchitis, GMC Cerebral Impaction w/ Irrigation, GMC Chest Pain, GMC Concussion, GMC Conjunctivitis, bilateral, GMC Conjunctivitis, left, GMC Conjunctivitis, right, GMC COVID-19 in House PCR Test, and GMC COVID-19 Respiratory Panel (COVID, Flu A/B, RSV).

Patient chart after updating template selections, showing "occasional UTIs" now included in the HPI

Step 54: Use structured lists for patient data

Most of the time, use structured lists for entering patient data. Structured lists present a question, such as "The patient complains of UTI symptoms," with multiple selectable answers; select all answers that apply to the patient's case. Consider how each question is phrased to ensure clarity and completeness.

The screenshot displays a medical software interface with a patient's medical history on the left and a template pop-up window on the right. The patient's information includes: Wolverine, Logan (Woffenski, L.), 49 Y, M, INPO, HSR, and a date of birth of 01/01/1975. The patient's address is 1092 E 1890 W, Orem, UT 84097. The patient's primary insurance is SELF PAY, and the payer ID is self. The patient's account number is 1016671, and the encounter date is 04/03/2024. The patient's appointment facility is Granger Medical Wasatch - PM & Internal Medicine.

The template pop-up window is titled "UTI" and contains a structured list of symptoms with checkboxes for selection. The symptoms include:

- UTI (Urinary Tract Infection)
- UTI symptoms have been present for: all week
- The main symptoms include: frequency, urgency, pain in the urine
- What is the patient's favorite number? 22
- The date on which is began? 04/02/2024
- The date something else began? 06/2024
- Another date? 2024
- Screening for STIs: No
- Would you like to be screened today? No

The template pop-up window also includes a section for "Current Medication" with a list of medications and their dosages:

- Extradol 1 MG Tablet 1 tablet Orally Once a day.
- Lidocaine 10 MG Tablet 1 tablet Orally Once a day.
- Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs pm pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
- Lorazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
- Livostatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.

Template pop-up window with a structured list for UTI symptoms, including checkboxes for symptom duration and main symptoms

Step 55: Add custom information with a blank field

Click on a blank field to type in custom symptoms or notes if the patient's presentation is unique and not covered by the standard list.

Click Through: Wolverine, Logan, Wolverine

UTI

The patient complains of UTI symptoms

- ☐ starting today
- ☐ since yesterday
- ☒ for 2-3 days
- ☐ for 4-5 day
- ☐ for about a week
- ☐ for longer than a week

The main symptoms include

- ☒ frequency
- ☒ urgency
- ☒ pain with urination
- ☐ blood in the urine
- ☐ bladder pain

The onset of symptoms was

- ☒ gradual
- ☐ sudden

The severity of the symptoms is

OK Cancel RDB

Template pop-up window with blank fields for custom input, checkboxes for symptoms, and options for onset and severity

Step 56: Review and finalize custom entries

In the **Click Through** pop-up for "Urinary Tract Infection," verify that all relevant symptoms are selected and that custom entries, such as "green kidney stones," are included in the main symptoms field alongside standard options like frequency, urgency, and pain with urination. Ensure other fields, such as onset and severity, are filled as appropriate, then click **OK** to close the template and apply the selections to the patient note.

The screenshot displays a medical software interface for a patient note. The patient is Logan Wolfenstein, 49 years old, male, with a preferred name of Logan Wolfenstein. The note is for a Urinary Tract Infection (UTI) template. The main symptoms field includes "frequency, urgency, pain with urination, blood in the urine green kidney stones". The onset of symptoms is "gradual", and the severity is "moderate". The note also includes a list of current medications and a medical history section.

Progress Note: **UTI** **Urinary Tract Infection**

The patient complains of UTI symptoms for 2-3 days. The main symptoms include frequency, urgency, pain with urination, blood in the urine green kidney stones. The onset of symptoms was gradual. The severity of the symptoms is moderate. Alleviating factors include increased fluid intake. Associated symptoms include no mid back pain. History of prior UTIs occasional UTIs.

Current Medication:

- Estradiol 1 MG Tablet 1 tablet Orally Once a day.
- Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
- Pericort 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
- oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- HYDROcodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
- Lofexipam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
- Livostatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
- oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.

Medical History:

Allergies/Intolerance:

Right Hand Sidebar:

- ☒ CE BPPV
- ☒ E3 Acute Visc Noto
- ☒ E3 COVID test
- ☒ E3 Croup
- ☒ E3 Fall single family
- ☒ E3 H Pylon Anom/Clarith/Omepr/Pepto
- ☒ E3 Tonsillitis
- ☒ E3 Truening Test
- ☒ GMC Abdominal pain
- ☒ GMC Allergies
- ☒ GMC Ankle Sprain, left
- ☒ GMC Ankle Sprain, right
- ☒ GMC Asthma Exacerbation-Urgent Care
- ☒ GMC Bells Palsy
- ☒ GMC Bowens fracture, left
- ☒ GMC Bowens fracture, right
- ☒ GMC Bronchitis
- ☒ GMC Bronchitis RSV Positive
- ☒ GMC Cerumen impaction w/ irrigation
- ☒ GMC Chest Pain
- ☒ GMC Constipation
- ☒ GMC Conjunctivitis, bilateral
- ☒ GMC Conjunctivitis, left
- ☒ GMC COVID-19 in House PCR Test
- ☒ GMC COVID-19 Respiratory Panel (COVID, Ru A/B, RSV)

Template pop-up for UTI with standard and custom symptoms entered, checkboxes selected, and cursor near the OK button

Step 57: Verify the note reflects your entries

After closing the template, check the HPI section in the patient chart. Confirm that the main symptoms now list frequency, urgency, pain with urination, blood in the urine, green kidney stones, and that symptom duration and history of prior UTIs are documented correctly.

The screenshot displays a patient chart for Wolverine, Logan (Wolfenstein, L.), 49 Y, M. The HPI section is visible, showing a template example for a urinary tract infection. The main symptoms listed are: frequency, urgency, pain with urination, blood in the urine, and green kidney stones. The onset of symptoms was gradual, and the severity is moderate. The date on which it began is 04/02/2024. The date something else began is 06/20/2024. Another date is 2024. Screening for STIs: No. Would you like to be screened today? No.

The current medication list includes:

- Estradiol 1 MG Tablet 1 tablet Orally Once a day.
- Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
- Pericocet 5-325 MG Tablet 1 tablet Orally every 6 hrs pm pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
- LORazepam 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
- Livostatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
- Hydrocodone-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
- Hydrocodone-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs pm pain. May cause drowsiness.

The right sidebar shows a list of templates, including CE BPPV, ECG Acute Work Note, ECG COVID visit, ECG Group, ECG Fall single family, ECG H Pylon Amou/Clearth/Omap/Repto, ECG Tonsillitis, ECG Training Test, ECG Abdominal pain, GMC Allergies, GMC Ankle Sprain, left, GMC Ankle Sprain, right, GMC Asthma Exacerbation-Urgent Care, GMC Beta Palsy, GMC Bowers fracture, left, GMC Bowers fracture, right, GMC Bronchitis, GMC Bronchitis RSV Positive, GMC Chest Pain, GMC Concussion, GMC Conjunctivitis, bilateral, GMC Conjunctivitis, left, GMC Conjunctivitis, right, GMC COVID-19 in House PCR Test, and GMC COVID-19 Respiratory Panel (COVID, Flu A/B, RSV).

Patient chart HPI section showing UTI symptoms including the custom entry "green kidney stones"

Step 58: Save the template for future use

Make sure at least one question in the template is answered before saving.
Save the current template as a favorite so it appears in the **My Favorite Templates** panel for quick access on future visits.

The screenshot displays a medical software interface for a patient named WOLVERINE, Logan (Wolffenstein, J), 49 Y, M. The interface includes a top navigation bar with tabs for Progress Note, Orders, and h Insights. The main content area shows the patient's medical history, including a recent visit on 04/03/2024. The 'Subjective' section contains a template for a urinary tract infection (UTI) with fields for symptoms, duration, and severity. The 'Objective' section is currently empty. The 'Current Medication' section lists several medications, including Estradiol, Lisinopril, Percocet, and various painkillers. The 'Medical History' section is also empty. On the right side, the 'My Favorite Templates' panel is visible, showing a list of templates that can be applied to the current note. The templates include various medical conditions and procedures, such as COPD, Acute Visit Note, COVID-19, Croup, Fall/Jungle Family, H-Pylori/Amox/Clarith/omep/pepto, Tonsillitis, Training Test, Abdominal pain, Allergies, Ankle Sprain, left, Ankle Sprain, right, Asthma Exacerbation-Urgent Care, Bell's Palsy, Bovine Rectum, left, Bovine Rectum, right, Bronchitis, Bronchitis RSV Positive, Bronchitis, Chest Pain, Concussion, Conjunctivitis, bilateral, Conjunctivitis, left, Conjunctivitis, right, COVID-19 in House PCR Test, and COVID-19 Respiratory Panel (COVID, Flu A/B, RSV).

Patient chart with the "My Favorite Templates" panel visible, ready for saving templates

Step 59: Reuse saved templates for common visit types

For frequently encountered conditions, use your saved templates to streamline documentation. Access your favorites from the right panel to quickly insert structured notes for similar patient encounters.

The screenshot displays a medical chart for a patient named Wolverine, Logan (Wolfenstein), 49 Y, M. The chart includes a header with patient information, a navigation bar, and a main content area. The main content area is divided into two sections: a left section for patient history and a right section for templates.

Left Section (Patient History):

- Subjective:**
 - Chief Complaint(s):** Template building
 - Investigational studies:** Template examples
 - The symptoms have been present for all week
 - The main symptoms include: fevers, chills, sore throat
 - What is the patient's favorite number? 22
 - The date on which it began? 04/02/2024
 - The date something else began? 06/20/2024
 - Another date: 2024
 - Screening for STIs: No
 - Would you like to be screened today? No
 - UTI:**
 - Urinary Tract Infection:**
 - The patient complains of UTI symptoms for 2-3 days
 - The main symptoms include: frequency, urgency, pain with urination, blood in the urine, green, kidney stones
 - The onset of symptoms was: gradual
 - The severity of the symptoms is: moderate
 - Alleviating factors include: increased fluid intake
 - Associated symptoms include: no mid back pain
 - History of prior UTIs: occasional UTIs
- Current Medications:**
 - Taking:**
 - Estradiol 1 MG Tablet 1 tablet Orally Once a day.
 - Lisinopril 10 MG Tablet 1 tablet Orally Once a day.
 - Percocet 5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - HYDROCODONE-Acetaminophen 10-325 MG Tablet 1 tablet as needed Orally every 6 hrs.
 - LORAZEPAM 1 MG Tablet 1 tablet at bedtime as needed Orally Once a day.
 - Lovastatin 10 MG Tablet 1 tablet with the evening meal Orally Once a day.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - oxyCODONE-Acetaminophen 5-325 MG Tablet 1 tablet Orally every 6 hrs if needed for pain. May cause drowsiness.
 - Unknown:**
 - HYDROCODONE-Acetaminophen 7.5-325 MG Tablet 1 tablet Orally every 6 hrs prn pain. May cause drowsiness.
- Medical History:**
 - Allergies/Intolerances:

Right Section (Templates):

- My Favorite Templates:**
 - EDJ EPRV
 - EDJ Acute Visit Note
 - EDJ COVID visit
 - EDJ Croup
 - EDJ Fall single family
 - EDJ H-Pylori Amox/Clarith/Omepr/Pepso
 - EDJ Tetanus
 - EDJ Training Test
 - GMAC Abdominal pain
 - GMAC Allergies
 - GMAC Ankle Sprain, left
 - GMAC Ankle Sprain, right
 - GMAC Asthma Exacerbation-Urgent Care
 - GMAC Bell's Palsy
 - GMAC Biceps Rupture, left
 - GMAC Biceps Rupture, right
 - GMAC Bronchitis
 - GMAC Bronchitis RSV Positive
 - GMAC Bronchitis
 - GMAC Carum impact of irrigation
 - GMAC Chest Pain
 - GMAC Concussion
 - GMAC Conjunctivitis, bilateral
 - GMAC Conjunctivitis, left
 - GMAC Conjunctivitis, right
 - GMAC COVID-19 In House PCR Test
 - GMAC COVID-19 Respiratory Panel (COVID, Flu A/B, RSV)

Patient chart with the "My Favorite Templates" panel showing a list of saved templates for common visit types

Step 60: Confirm the note is complete

Once documentation is complete, review the note for accuracy and completeness.

The screenshot displays a medical software interface for a patient named Wolverine, Logan (Wolfenstein, L.), 49 Y, M. The patient's information, including DOB (01/01/1975), gender (Male), and address, is visible at the top. The main section shows a 'Progress Note' with a structured HPI (History of Present Illness) and a list of medications. The HPI includes details about urinary tract infection symptoms, such as frequency, urgency, and pain with urination, and mentions a recent UTI. The medications list includes Extralid 1 MG Tablet, Litalipril 10 MG Tablet, Percocet 5-325 MG Tablet, and others. A 'My Favorite Templates' panel on the right side of the screen lists various medical templates, such as 'CE BPPV', 'UTI Acute Visit Note', 'UTI COVID visit', and 'UTI Urinary Tract Infection', which are used to populate the note. The interface also shows a 'Secure Notes' section and a 'Patient Data' tab.

Patient chart finalized with structured HPI and template entries, ready for review

What's next

With your custom structured template built, you can continue to refine it by adding further fields, adjusting branching logic, or correcting data types as your clinical workflow requires. Use your favorite templates panel to switch between structured templates for different visit types, combine template-driven entries with custom free-text additions, and save new templates as favorites so they are ready for quick reuse on future patient encounters.