



2 MINUTE PEARLS

S/O Module Templates



- Would you like to easily modify an S/O template to better fit your practice pattern?
- Would you like to create an S/O template containing a block of standard free text (i.e. Procedure Note, Standard physical exam text, etc...)?
- This Pearl will outline how to create an S/O template, modify an existing S/O template and demonstrate how an S/O template can be used to easily document blocks of free text

Creating A New S/O Template

USER, TEST: Military Clinical Desktop - S/O (Privacy Act)

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt FindTerm Browse From Here

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Feb 1952

Folder List

- Desktop
 - Alert Review
 - Appointments
 - Telephone Consults
 - Search
 - Patient List
 - Consult Log
 - Co-signs
 - New Results
 - Reports
 - Tools
 - Sign Orders
 - Immunizations Admin
- BERG, OLAF V
 - Demographics
 - Health History
 - Problems
 - Meds
 - Allergy
 - Wellness
 - Immunizations
 - Vital Signs Review
 - PKC Couplers
 - Readiness
 - Patient Questionnaires
 - Lab
 - Radiology
 - Clinical Notes
 - Previous Encounters
 - Flowsheets
 - Current Encounter
 - Screening
 - Vital Signs Entry
 - S/O

<< >> <No Template Selected> AutoNeg ROS/HPI History FamHist Prompt IPrompt ListSize 1

Entry details for current selection

Encounter Background Information:

Duration (numeric) Onset Modifier

Value Unit

HPI

- Medicin (Symptoms)
 - encounter background information
 - systemic symptoms
 - pain control techniques
 - head-related symptoms
 - eye symptoms
 - otolaryngeal symptoms
 - neck symptoms
 - breast symptoms
 - cardiovascular symptoms
 - pulmonary symptoms
 - gastrointestinal symptoms
 - genitourinary symptoms
 - endocrine symptoms
 - skin symptoms
 - hematologic symptoms
 - musculoskeletal symptoms
 - neurological symptoms
 - psychological symptoms
 - pediatric screening

Browse Tests PE ROS PMH

All S/O Template Management will be done within the S/O Module of an encounter

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt FindTerm Browse From Here A/E Disposition Sign Cancel Close

BERG, OLAF V 20/245-63-8943 55yo M R

Folder List

- Desktop
- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Review
- PKC Couplers
- Readiness
- Patient Questionnaires
- Lab
- Radiology
- Clinical Notes
- Previous Encounters
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entry
- S/O

Entry details for current selection: Military service

History of present illness

The Patient is a 55 year old male.

- ° [Encounter](#) Background Information:
- [Visit](#) is deployment-related

Start by selecting bullets you wish to include in your template (make sure you include HPI, PMH, ROS, PE and Tests bullets as desired)

Browse

- Symptoms
 - encounter background information
 - Phone Call - Chief Concern:
 - Chief Complaint:
 - Visit For:
 - History Unobtainable
 - History Partially Obtainable
 - ROS changed
 - past medical history reviewed
 - problem list reviewed
 - medication list reviewed
 - family history reviewed
 - surgical history reviewed
 - ROS free text
 - source of patient information
 - person requesting consult on behalf of third party
 - reliability of report
 - patient accompanied
 - Free text:
 - 'Subjective' Free text:
 - military service
 - branch
 - status

USER, TEST in CHCSII Test Clinic at CHCSII ITT

start | Microsoft P... | 2 Clinical ... | 11:14 AM

USER: TESTS; MUIB... (Checked) Desktop - S/O (Delivery Act of 1974 (FOUO)) - Training System

Sign Cancel Close

10 Feb 1952

ROS/HPI His

Options

You can include free text associated with any of the bullets which will also be saved in your template.
Note: The free text emits with both the positive and negative response so choose your wording wisely.

To include free text:

- 1) Select bullet
- 2) Type in desired free text
- 3) Push Enter key
- 4) Free text will appear on right side of screen

Alert Review

Appointments

Telephone Consults

Search

Patient List

Consult Log

Co-signs

New Results

Reports

Tools

Sign Orders

Immunizations Admin

BERG, DLAFV

Demographics

Health History

Problems

Meds

Allergy

Wellness

Immunizations

Vital Signs Review

PKC Couplers

owse Tests PE ROS PMH HPI

medication list reviewed Medication List Reviewed and Updated

Medication List Reviewed and Updated

Symptoms

- encounter background information
- Phone Call - Chief Concern:
- Chief Complaint:
- Visit For:
- History Unobtainable
- History Partially Obtainable
- ROS changed
- past medical history reviewed
- problem list reviewed
- medication list reviewed
- family history reviewed
- surgical history reviewed
- ROS free text
- source of patient information

History of present illness

The Patient is a 55 year old male.

- ° Encounter Background Information: • Medication list reviewed
- Medication List Reviewed and Updated
- Visit is deployment-related

Free Text

Possible use of free text in an S/O Template: Creating Procedure Notes

The screenshot shows a medical software interface with a patient record for BERG, OLAF V (DOB: 10 Feb 1952). The interface includes a folder list on the left, a central area for entering details for the current selection (SO - PROC - LP), and a right-hand pane for history and objective notes. A yellow callout box points to the objective text field, stating: "Type in free text for standard Lumbar Puncture procedure note leaving spaces for modifiable fields. Note: There is a 2000 character limit or about half a page in any free text field. Text longer than this will get cut off in the note."

Folder List: Desktop, Alert Review, Appointments, Telephone Consults, Search, Patient List, Consult Log, Co-signs, New Results, Reports, Tools, Sign Orders, Immunizations Admin, BERG, OLAF V, Demographics, Health History, Problems, Meds, Allergy, Wellness, Immunizations, Vital Signs Review, PKC Couplers, Readiness, Patient Questionnaires, Lab, Radiology, Clinical Notes, Previous Encounters, Flowsheets.

Entry details for current selection: SO - PROC - LP, AutoNeg, ROS/HPI, HI

OBJECTIVE [Use for s.o.a.p note free text]

A lumbar puncture was performed for evaluation of _____. The procedure was discussed at length and the patient gave informed consent. The patient was placed in the lateral decubitus position, draped and locally anesthetized in the usual manner. _____ cc clear, colorless fluid was obtained from the L_____ interspace with the opening pressure being _____ mm H2O and the closing pressure being _____ mm H2O. The fluid was sent for cell counts (tubes 1 and 4), gram stain, bacterial/viral/fungal cultures, protein, glucose, cryptococcal Ag, oligoclonal bands, IgG index, myelin basic protein.

History of present illness

The Patient is a 55 year old male.

- ° [Encounter](#) Background Information: • [Medication](#) list reviewed Medication List Reviewed and Updated
- [Visit](#) is deployment-related

Objective

[A lumbar](#) puncture was performed for evaluation of _____. The procedure was discussed at length and the patient gave informed consent. The patient was placed in the lateral decubitus position, draped and locally anesthetized in the usual manner. _____ cc clear, colorless fluid was obtained from the L_____ interspace with the opening pressure being _____ mm H2O and the closing pressure being _____ mm H2O. The fluid was sent for cell counts (tubes 1 and 4), gram stain, bacterial/viral/fungal cultures, protein, glucose, cryptococcal Ag, oligoclonal bands, IgG index, myelin basic protein.

Saving An S/O Template

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt Find Term Browse From Here A/B Disposition Sign Cancel Close

Save List Note Template

Save in: Personal

Folder: Personal List

Template Name

- #CTM PE--Starter Template
- back low extremity--so--mes
- back upper extremity--so--mes
- CONSENT--Abdominal Surgery
- COUNSEL--Adolescent Female
- COUNSEL--Innocent Murmur
- EDU--Asthma Education
- EDU--Diabetes Education
- EDU--HTN Education
- EDU--Hyperlipedemia Education

Template Name: Lumbar Puncture Proc--so--mes

Specialty:

Add to Favorites Shared

Save Cancel

3) Enter desired name of template and Save

History of present illness

The Patient is a 55 year old male.

- ° [Encounter](#) Background Information: • [Medication](#) list reviewed Medication List Reviewed and Updated
- [Visit](#) is deployment-related

Objective

A lumbar puncture was performed for evaluation of _____. The procedure was discussed at length and the patient gave informed consent. The patient was placed in the lateral decubitus position, draped and locally anesthetized in the usual manner. ____ cc clear, colorless fluid was obtained from the L_____ interspace with the opening pressure being _____ mm H2O and the closing pressure being _____ mm H2O. The fluid was sent for cell counts (tubes 1 and 4), gram stain, bacterial/viral/fungal cultures, protein, glucose, cryptococcal Ag, oligoclonal bands, IgG index, myelin basic protein

Using An S/O Template

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt FindTerm Browse From Here A/P Disposition Sign

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Fe

Folder List

- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
 - Demographics
 - Health History
 - Problems
 - Meds
 - Allergy
 - Wellness
 - Immunizations
 - Vital Signs Review
 - PKC Couplers
 - Readiness
 - Patient Questionnaires
 - Lab
 - Radiology
 - Clinical Notes
 - Previous Encounters
 - Flowsheets
 - Current Encounter
 - Screening
 - Vital Signs Entry
 - S/O
 - A/P

bar Puncture Proc-so-mes

AutoNeg

Entry data

Encour

SD - gen medicin-so-mes

SD - general medicin temp-

SD - Lumbar Puncture Proc

SD - PE--Adult Basic

SD - PE--Adult Comprehen:

SD - PE--Ankle

SD - PE--Ankle left

SD - PE--Ankle right

SD - PE--Back General

Duration (numeric) Onset Modifier

Value Unit

encounter background information

medication list reviewed Medication List Reviewed and Updated

military service status visit is deployment-related

HPI

PMH

ROS

PE

Tests

Browse

ListSize 1

Options

USER, TEST in CHCSII Test Clinic at CHCSII ITT

To use an S/O Template, simply select from your drop down menu

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

1) Select bullet by clicking "+" or "-" box

2) Make any modifications to text

Folder List

- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Review
- PKC Couplers
- Readiness
- Patient Questionnaires
- Lab
- Radiology
- Clinical Notes
- Previous Encounters
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entry
- S/O
- A/P

Encounter 1524 SO Note was saved.

USER, TEST in CHCSII Test Clinic at CHCSII ITT

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template Mgt Dx Prompt FindTerm Browse From Here A/P Disposition Sign Can

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Feb 1

Folder List

- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
 - Demographics
 - Health History
 - Problems
 - Meds
 - Allergy
 - Wellness
 - Immunizations
 - Vital Signs Review
 - PKC Couplers
 - Readiness
 - Patient Questionnaires
- Lab
- Radiology
- Clinical Notes
- Previous Encounters
- Flowsheets
- Current Encounter
 - Screening
 - Vital Signs Entry
 - S/O
 - A/P

SO - Lumbar Puncture Pro AutoNeg ROS/HP

Entry details for current selection

A lumbar puncture was performed for evaluation of HEADACHE. The procedure was performed in the lateral decubitus position, draped and locally anesthetized in the usual manner. 10 cc clear, colorless fluid was obtained from the L____ interspace with the opening pressure being ____ mm H2O and the closing pressure being ____ mm H2O. The fluid was sent for cell counts (tubes 1 and 4), gram stain, bacterial/viral/fungal cultures, protein, glucose, cryptococcal Ag, oligoclonal bands, IgG index, myelin basic protein.

Duration (numeric) Onset Modifier

Value Unit

Templates (Physical Examination)

OBJECTIVE [Use For S.O.A.P Note Free Text] A lumbar puncture was performed for evaluation of _____. The procedure was dis...

Objective

A lumbar puncture was performed for evaluation of HEADACHE. The procedure was discussed at length and the patient gave informed consent. The patient was placed in the lateral decubitus position, draped and locally anesthetized in the usual manner. 10 cc clear, colorless fluid was obtained from the L____ interspace with the opening pressure being ____ mm H2O and the closing pressure being ____ mm H2O. The fluid was sent for cell counts (tubes 1 and 4), gram stain, bacterial/viral/fungal cultures, protein, glucose, cryptococcal Ag, oligoclonal bands, IgG index, myelin basic protein

3) Once modifications are complete, make sure you scroll to end of text and hit RETURN. That will cause the text to display on the right.

Editing An S/O Template

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

Editing an S/O Template

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Feb 1952

1) Select the new bullets you wish to add to your template (DO NOT HAVE TO HAVE ORIGINAL TEMPLATE LOADED)

Folder List

- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Review
- PKC Couplers
- Readiness
- Patient Questionnaires
- Lab
- Radiology
- Clinical Notes
- Previous Encounters
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entry
- S/O
- A/P

Entry details for current selection

History of post-lumbar puncture headache

Value Unit

Search: Lumbar Puncture (History)

- reported lumbar puncture
- late procedural complications of fluid aspiration
- History of Diagnoses, Syndromes And Conditions
 - history of post-lumbar puncture headache
 - history of LUMBAR PUNCTURE TRAUMATIC TAP
- History of Therapy
 - history of Anesthesia For Lumbar Diagnostic/Therapeutic Puncture
 - history of Spinal Tap (therapeutic)
 - history of Insert Spinal Catheter For Continuous Drug Infusion
 - history of Misadventure During Lumbar Puncture
 - history of Sterile Precautions Not Taken During Lumbar Puncture
 - history of Foreign Body Left During Lumbar Puncture
 - history of Instrument Failure During Lumbar Puncture

Past medical/surgical history

Diagnosis History:

[Post-lumbar](#) puncture headache

USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/EO110) - Training System

File Edit View Go Tools

Save Save As Template Mgt Dx Prompt FindTerm Browse From Here A/P Disposition Sign Cancel Close

2) Select Save As button

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Feb 1952

Folder List

- Alert Review
- Appointments
- Telephone Consults
- Search
- Patient List
- Consult Log
- Co-signs
- New Results
- Reports
- Tools
- Sign Orders
- Immunizations Admin
- BERG, OLAF V
- Demographics
- Health History
- Problems
- Meds
- Allergy
- Wellness
- Immunizations
- Vital Signs Review
- PKC Couplers
- Readiness
- Patient Questionnaires
- Lab
- Radiology
- Clinical Notes
- Previous Encounters
- Flowsheets
- Current Encounter
- Screening
- Vital Signs Entry
- S/O
- A/P

<< >> <No Template Selected> AutoNeg ROS/HPI History FamHist Prompt I Prompt ListSize 3

Entry details for current selection

History of post-lumbar puncture headache

Duration (numeric) Onset Modifier

Value Unit

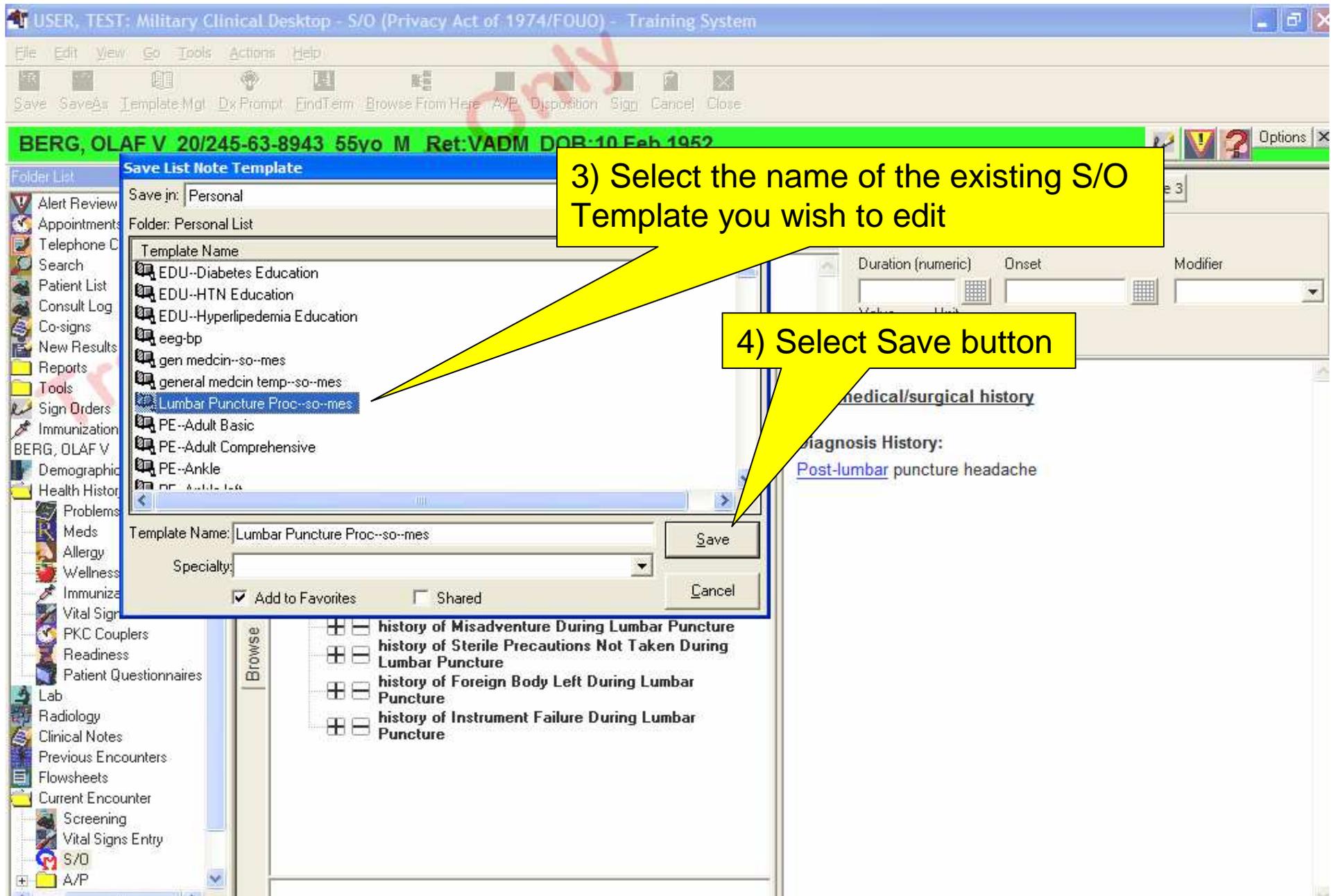
Search: Lumbar Puncture (History)

- reported lumbar puncture
- late procedural complications of fluid aspiration
- History of Diagnoses, Syndromes And Conditions
 - history of post-lumbar puncture headache
 - history of LUMBAR PUNCTURE TRAUMATIC TAP
- History of Therapy
 - history of Anesthesia For Lumbar Diagnostic/Therapeutic Puncture
 - history of Spinal Tap (therapeutic)
 - history of Insert Spinal Catheter For Continuous Drug Infusion
 - history of Misadventure During Lumbar Puncture
 - history of Sterile Precautions Not Taken During Lumbar Puncture
 - history of Foreign Body Left During Lumbar Puncture
 - history of Instrument Failure During Lumbar Puncture

Past medical/surgical history

Diagnosis History:

[Post-lumbar](#) puncture headache



USER, TEST: Military Clinical Desktop - S/O (Privacy Act of 1974/FOUO) - Training System

File Edit View Go Tools Actions Help

Save SaveAs Template-Mgt Dx Prompt FindTerm Browse From Here A/P Disposition Sign Cancel Close

BERG, OLAF V 20/245-63-8943 55yo M Ret:VADM DOB:10 Feb 1952

Folder List

Alert Review
Appointments
Telephone C
Search
Patient List
Consult Log
Co-signs
New Results
Reports
Tools
Sign Orders
Immunization
BERG, OLAF V
Demographic
Health Histor
Problems
Meds
Allergy
Wellness
Immuniza
Vital Sign
PKC Couplers
Readiness
Patient Questionnaires
Lab
Radiology
Clinical Notes
Previous Encounters
Flowsheets
Current Encounter
Screening
Vital Signs Entry
S/O
A/P

Save List Note Template

Save in: Personal
Folder: Personal List

Template Name

- EDU--Diabetes Education
- EDU--HTN E
- EDU--Hyperli
- eeg-bp
- gen medicin--
- general medc
- Lumbar Punc
- PE--Adult Bas
- PE--Adult Cor
- PE--Ankle
- PE--Ankle

This Template Name already exists.

Do you want to REPLACE the template "Lumbar Puncture Proc--so--mes" or ADD TO it?

~~Replace~~ **Add To** Cancel

5) Select Add To button (DO NOT SELECT REPLACE)

Template Name: Lumbar Puncture Proc--so--mes
Specialty:
 Add to Favorites Shared

Save Cancel

Diagnosis History:
Post-lumbar puncture headache

- history of Misadventure During Lumbar Puncture
- history of Sterile Precautions Not Taken During Lumbar Puncture
- history of Foreign Body Left During Lumbar Puncture
- history of Instrument Failure During Lumbar Puncture

Congratulations! Your S/O Template now has the newly added bullets available to use on the next patient.

Final Thoughts

- S/O templates should not be used to duplicate what you can already document from your favorite general Medcin or AIM form template
- Use the method described to:
 - Enhance your current general template (the one you use most often)
 - Create a niche template for documentation that you do regularly that is NOT covered in the Medcin or AIM form template that you use most often



For More Information...



- **AMEDD AHLTA Homepage**
 - <https://www.us.army.mil/suite/page/406> (AKO password required)
- **AHLTA Video Tutorials**
 - <http://www-nmcp.mar.med.navy.mil/AHLTA/AHLTA%20Training%20Tools/index.html>

I would appreciate any feedback or suggestions you have for future ***AHLTA 2 Minute Pearls***. Please contact me at the following:

MAJ Mark Stackle, MD (AHLTA Program Office)

- Email: mark.stackle@us.army.mil

(If you would like to receive future versions of the AHLTA 2 Minute Pearls directly, please email Lokia Brockenberry at Lokia.Brockenberry@us.army.mil to be added to the distribution list)