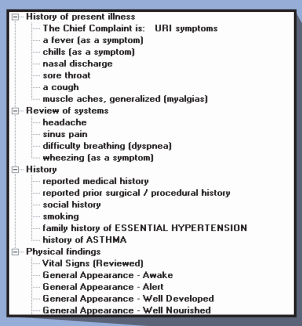
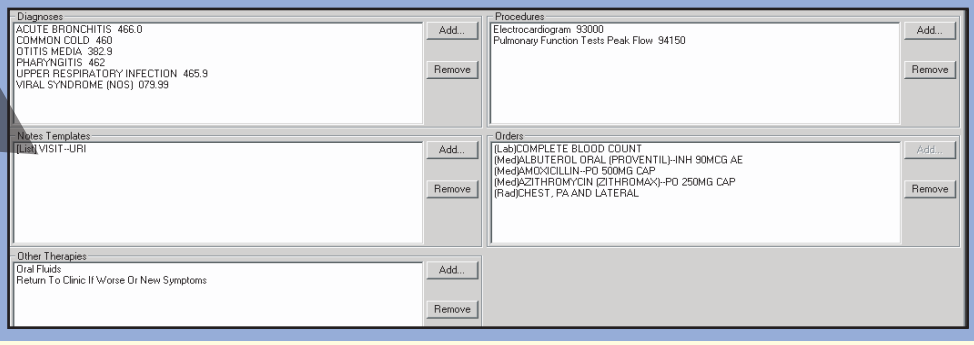
TYPES OF TEMPLATES



S/O Visit Templates are built to document the subjective and objective portion of an encounter.

Encounter Templates are built to document all aspects of the patient visit. These combine the S/O Visit template, diagnoses, procedures, order sets, and other therapies.



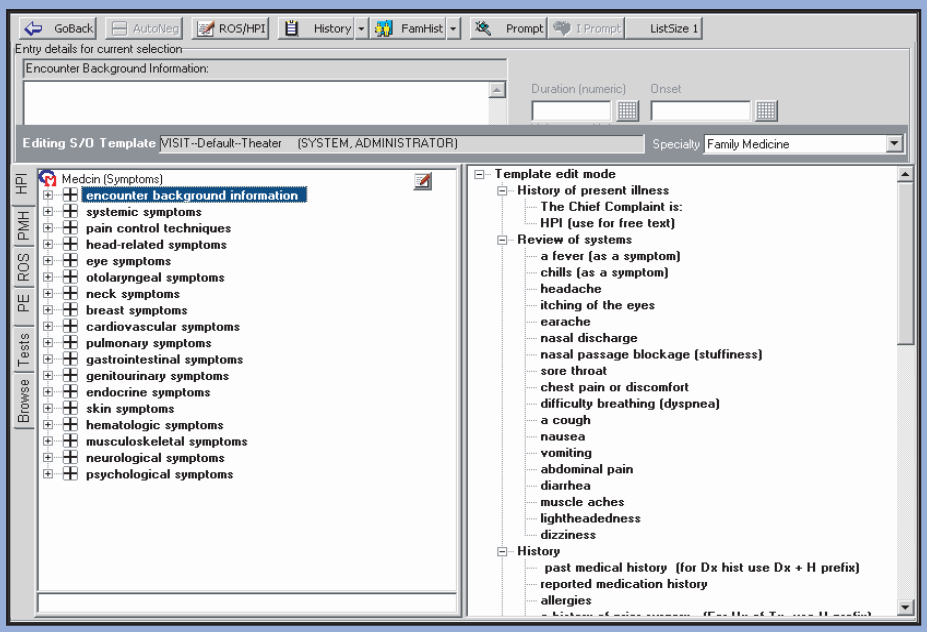
Default Encounter Templates: An encounter template that is set as a personal default automatically loads into every encounter opened by the user. It is suggested that all providers and/or clinics develop a Default Encounter Template that includes a basic S/O template, top diagnoses, procedures, orders, and other therapies. To select a template as your default: Highlight the template and perform a right-mouse click and select **Default Encounter Template** from the pop-up menu.

EDITING EXISTING S/O VISIT TEMPLATES

New CHCS II users should select existing S/O Visit Templates and edit them to reflect their documentation style and common visit types. S/O Visit Templates are available in the CHCS II application for you to edit.

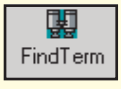
1. Create an appt for a test patient in the test clinic and navigate to the S/O module.
2. Click **Template Mgt** in the Action Bar to open the S/O Template Management module.
3. Search for the S/O template. Highlight the exisiting S/O Visit Template you wish to edit and click **Edit** in the Action Bar to enter *Template Edit Mode*.
4. To add terms to the template, use MEDCIN search tools such as **Dx Prompt**, **Find Term** and **Browse From Here** to locate the term you need. When the term is found, click the **large plus** to add the term to the template.
5. To remove terms from the template, highlight a term from the template and deselect the **red plus** that appears with the term in MEDCIN Edit View.
6. When the editing is completed, click **Save As** in the Action Bar, name the template, and click **Save**. If you are editing one of your personal templates, click **Save** from the Action Bar if you want to keep the same template name.
7. Click **Cancel** in the Action Bar to exit *Template Edit Mode*. From the S/O Template Management module, click **Refresh** in the Action Bar to view your new template.

Existing S/O Template

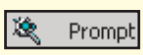


Template Edit Mode

Search Tools



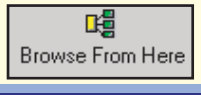
Find Term: Returns a list of terms related to the entered term.



Prompt: Returns a list of terms related to a selected term.

Dx Prompt: Returns a list of terms related to the entered diagnosis, building a template "on the fly."

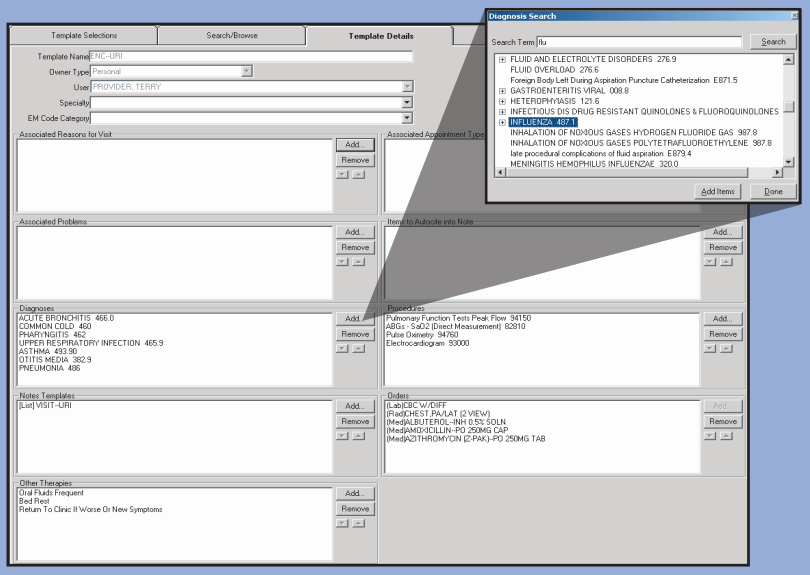
ListSize: This feautre creates a broader or narrorwer list of findings. Three levels exist: short (List Size 1), medium (List Size 2), and long (List Size 3). Use List Size after conducting a Find Term, Prompt, Dx Prompt or I Prompt.



Browse From Here: Browses from the selected term in the MEDCIN tree to its location within the entire MEDCIN hierarchy. Best used to locate physical finding terms.

BUILDING AND EDITING ENCOUNTER TEMPLATES

Encounter Templates allow you to create pick lists that cover an entire patient encounter to further streamline the documentation process. The Encounter Template is similar to building a personalized superbill that covers specific visit types or diagnoses.



To Build:

1. From the Folder List, open to the Template Management module and click **New** from the Action Bar to create a new Encounter Template.
2. Click **Add** in the Diagnosis area and search for all diagnoses you want to add to the new template.
3. Repeat the **Add** process for Notes Template (S/O Template), Procedures and Other Therapies.
4. Click **Save As** in the Action Bar, name the template and click **Save**.

To Edit:

1. Highlight the template you wish to edit and click **View/Edit** in the Action Bar.
2. Add and remove terms from each section.
3. Click **Save** in the Action Bar.

Navy CHCS II Template Naming Convention

DESCRIPTION--SPECIALTY--MTF--INITIALS--DATE
All parts capitalized, all separated with a double dash without spaces.
Description limited to 10 characters and may include spaces.
Specialty limited to 4 characters according to the table on the right.

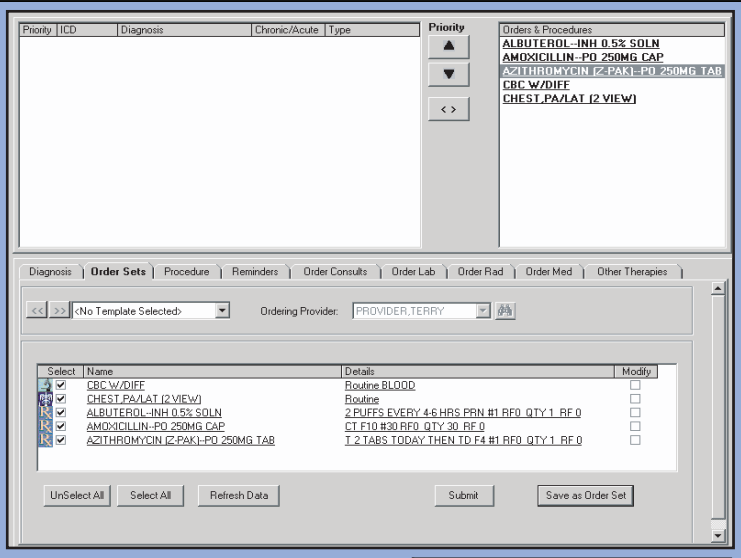
MTF e.g. NHL = Naval Hospital Lemoore;
NMCSD = Naval Medical Center San Diego;
NHCL = Naval Hospital Camp Lejeune;
(NAV = Navy Enterprise level templates)

Initials 2 or 3 characters
Date in format 020405 (04 February 2005)
It is Navy policy that templates are not to be shared on the enterprise level.

Symbol ☐	*Meaning*	*Symbol* ☐	*Meaning*	*Symbol* ☐	*Meaning*
CARD ☐	Cardiology	NEPH ☐	Nephrology	PMR ☐	Physical Med & Rehab
CHAP ☐	Chaplain	NEUR ☐	Neurology	POD ☐	Podiatry
CHIR ☐	Chiropractic	NURS ☐	Nursing	PREV ☐	Preventive Medicine
CT ☐	Cardiothoracic Surgery	NSGY ☐	Neuro Surgery	PSY ☐	Psychiatry
DENT ☐	Dental	NUTR ☐	Nutritional Medicine	PSYL ☐	Psychology
DERM ☐	Dermatology	OB ☐	Obstetrics	PT ☐	Physical Therapy
ENDO ☐	Endocrine	ONC ☐	Oncology	PULM ☐	Pulmonary
ENT ☐	Ear - Nose - Throat	OPHT ☐	Ophthalmology	RHEU ☐	Rheumatology
GI ☐	Gastroenterology	OPTO ☐	Optometry	SURG ☐	General Surgery
GU ☐	Genitourinary	ORTH ☐	Orthopedics	SWS ☐	Social Work Services
GYN ☐	Gynecology	OT ☐	Occupational Therapy	URO ☐	Urology
HEME ☐	Hematology	PAIN ☐	Pain Clinic	VASC ☐	Vascular Surgery
ID ☐	Infectious Disease	PC ☐	Primary Care	XRT ☐	Radiation Oncology
IM ☐	General Internal Medicine	PEDS ☐	Pediatrics		

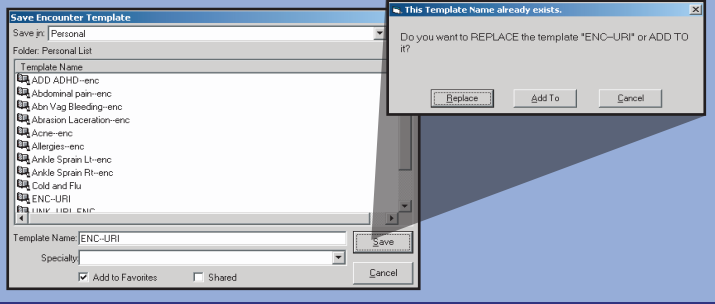
BUILDING AND EDITING ORDER SETS

Order Sets are templates of lab, rad and med orders that have been associated with a common diagnosis used to assist the end user in streamlining the ordering process. Order sets can be merged with appropriate Encounter Templates or they can be used independently in the A/P module.



To Build:

1. Create an appt for a test patient in the test clinic and navigate to the A/P module.
2. Search for and document the lab, rad and/or med order(s) you want to include in the order set. As you document each order, click **Save to Queue** to save each order without submitting it to the ancillary department.
3. Once all orders have been documented, click the Order Sets tab to display the orders that have been documented and saved to queue. Click **Save as Order Set**.
4. Name the order set and click **Save**. The Order Set Template can be merged with existing encounter templates or used independently in the A/P module.



To Edit:

1. To remove orders from an Order Set Template, open the Template Management module and search for the template.
2. Select the template and click **View/Edit** from the Action bar. In the Orders pane, select the order(s) and click **Remove**. Save the template.

To add orders to an existing Order Set or Encounter Template, repeat steps 2 and 3 from the Build process. When saving, select the existing template from the list and click **Save**. Click **Add To** to add the new orders to the existing template.