Customizing Templates and Flowsheets Guide

In this guide, you’ll learn how to claim and customize templates, establish flowsheets and share these powerful tools with other members of your practice. To access the Template community, simply select the “Template community” tile from your Practice Dashboard. Flowsheets can be found in your EHR Settings.

1. Start in the Template community
2. Create templates from scratch, edit saved templates, and establish shortcuts (macros)
3. Apply your templates in the encounter note and begin fine-tuning while charting
4. Find, create, and apply lab flowsheets
1. Start in the Template community

To access the Template Library, navigate to your Practice Dashboard and choose the “Template community” tile.

You’ll find two tabs in the Template Library:

**Community:** Start here by searching and saving copies of templates that were created by Practice Fusion and other providers (we have **thousands** of templates to choose from). You can search by specialty, keyword and/or rating. To get the most comprehensive list of results, choose “All Specialties”.

**INSIDER TIP** – search for “PFCS” to find a collection of commonly used provider-made templates.

**My templates:** This is where you can see templates you’ve copied, create templates from scratch and customize both. These are the templates you’ll see when charting in a patient’s chart.
2. Create templates from scratch, edit saved templates, and establish shortcuts

In “My templates”, select “Create template” to start a template from scratch.

[Image of template library]

Update the template details including NAME and relevant SPECIALTIES.

[Image of template details]

Add line items to your template within the “Subjective”, “Objective”, “Assessment” and “Plan” (SOAP) sections. Note that each time you “Add template item”, you are creating a line item. Line items correspond to a sentence or phrase you can click when in a patient’s (SOAP) encounter note.

[Images of template sections]

**INSIDER TIP** – if you currently have templates in Microsoft Word or other digital formats, you can simply copy and paste into new template items.
There are two basic styles of line items: point-and-click phrases and fill-in-the-blank phrases.

**Point-and-click phrases:** these are complete statements. When selected (inside the encounter note, not while customizing your template) the entire phrase will populate in the body of the corresponding section of the patient’s encounter (SOAP) note.

**Fill-in-the-blank phrases:** these are variable statements. Type a “??” to signify a variable. When this line-item is selected, the phrase will populate in the body section of the encounter note, but you will be prompted to type over the variable(s) or each “??”.

You can also include patient information in your template items. When inserting {address}, {age}, {dob}, {email}, {patient} and/or {phone}, this information will pull from the patient’s chart automatically.
You can edit the content of any line items by simply clicking on the text.

<table>
<thead>
<tr>
<th>Objective</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>General: Normotensive, in no acute distress</td>
<td></td>
</tr>
<tr>
<td>Head: Normocephalic, no lesions</td>
<td></td>
</tr>
<tr>
<td>Eyes: FERRULA, ODS flat, conjunctivae clear, fundi grossly normal</td>
<td></td>
</tr>
</tbody>
</table>

You can reorder your template items by selecting the four horizontal lines to the left of the line item.

<table>
<thead>
<tr>
<th>Objective</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Heart: RR, no murmurs, no rubs, no gallops</td>
<td></td>
</tr>
<tr>
<td>Abdomen: Soft, no tenderness, no masses, BS normal</td>
<td></td>
</tr>
<tr>
<td>GU: Normal, no lesions, no discharge, no hemmas noted</td>
<td></td>
</tr>
</tbody>
</table>

You can delete line items by selecting the “X” to the right of the line item.

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With these fundamentals in mind, create more detailed and robust content in each line item. Below are examples of single-click ROS and Physical Exam.

ROS: each system has a “(-),” representing a check box with a negative signal. If the patient denies these systems, you click once and move on. If the patient affirms one, you can edit the content in the body of the patient’s encounter (SOAP) note after the line-item has been selected.

**REVIEW OF SYSTEMS:**
- CONSTITUTIONAL: (-) Fever, (-) Chills, (-) Diphtheria, (-) Anorexia, (-) Insomnia, (-) Fatigue
- EARS: (-) Clogged ears, (-) Earaches, (-) Recurrent infections, (-) Ringing or popping ears, (-) Tinnitus, (-) Vertigo
- NOSE: (-) Change in sense of smell, (-) Itchy nose, (-) Nasal congestion, (-) Nasal discharge, (-) Nasal polyps, (-) Nose bleeds, (-) Runny nose, (-) Sneezing
- MOUTH/THROAT: (-) Difficulty swallowing, (-) Strep in the back of the throat, (-) Swollen tonsils, (-) Swollen tongue, (-) Throat tightness
- RESP: (-) Chest tightness, (-) Cough at night, (-) Coughing up blood, (-) Dry cough, (-) Frequent bronchitis/croupy cold, (-) Frequent coughing, (-) Recurrent Pneumonia, (-) Shortness of breath, (-) Wet cough, (-) Wheezing
- NECK: (-) Stiffness, (-) No pain, (-) Tenderness, (-) Nodded masses.
- CARDIO: (-) Chest pains, (-) Angina, (-) Edema, (-) Palpitations
- GL: (-) Abdominal pain, (-) Diarrhea, (-) Constipation, (-) Heartburn/Digestion, (-) Nausea, (-) Vomiting
- GUT: (-) Frequency, (-) Dysuria, (-) Urgency, (-) Hematuria, (-) Discharge, (-) Bleeding
- MS: (-) Arthritis, (-) Back pain, (-) Fractures, (-) Myalgia
- SKIN: (-) Rash, (-) Hives, (-) Persistent itch, (-) Recurrent abscesses, (-) Lesions, (-) Abrasions, (-) Swelling
- NEURO: (-) Weakness, (-) Numbness, (-) Dizziness, (-) Seizures, (-) Headache, (-) LOC
- ENDO: (-) Diabetes, and (-) Excessive thirst
- HEM/URINE: (-) Anemia, (-) Bleeding disorders, (-) Easy bruising and (-) Swollen ankles

Physical Exam: click once for a healthy patient.

**PHYSICAL EXAMINATION**
- GENERAL: Normotensive, in no acute distress.
- HEAD: Normochephalic, no lesions.
- EYES: PERI/ERA OK, no conjunctival clear
- EARS: DL’s clear, TM’s normal.
- NOSE: Mucoa normal, no obstruction.
- THROAT: Clear, no exudate, no lesions.
- NECK: Supple, no masses, no thyroemgal, no bruits.
- CHEST: Lungs clear, no rales, no rhonchi, no wheezes.
- HEART: R-R, no murmurs, no rubs, no gallops.
- ABDOMEN: Soft, no tenderness, no masses, BS normal.
- BACK: Normal curvature, no tenderness.
- EXTREMITIES: no deformities, no edema, no erythema.
- NEURO: Physiological, no localizing findings.
- SWN: Normal, no rashes, no lesions noted.
- EXTREMITIES: Warm, well perfused, no edema.

Think about how you can automate redundant data-entry by creating pre-programmed versions of ROS/exams/etc. Consider making different permutations of the same process. What would a typical diabetic patient’s ROS look like or a hypertensive patient?

**INSIDER TIP** – to delete your template or share it with other members of your practice, select the down arrow next to “Save”.

Last updated 5/5/2016
Lastly, charting shortcuts (or macros) will allow you to complete your encounters faster. Charting shortcuts can be applied to an entire template or to individual template line items.

To add a shortcut to a whole template, enter a Template Shortcut in the template Details. When charting an encounter, the entire template will populate when you type your template shortcut. *Note: Please enter “..” before the shortcut name (e.g. ..GPE) when charting to activate the shortcut.*

To add a shortcut to an individual template line item, complete the Item Shortcut field. When charting an encounter, the line will populate when you type your template shortcut. *Note: Please enter “.” before the shortcut name (e.g. .head) when charting to activate the shortcut.*

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**Additional Resources**

*Charting with templates*
How do I use templates?
How do I create new templates and edit existing templates?
How can I save a template to My templates?
How do I organize templates?
How do I share templates with users in my practice?
How do I customize my template line settings?

_Last updated 5/5/2016_
3. Apply your templates in the encounter note and begin fine-tuning while charting

When in a patient’s chart in an open encounter, click “Record” in one of SOAP note sections (e.g. Subjective).

Select one of your new templates. Remember you can use your shortcut to automatically populate all the template items from this section of the template (e.g. ..GPE).
To edit your templates on the fly, select “Edit items” at the bottom of your template list. Here you can change the content, reorder and delete template items while you chart.

For the full charting workflow guide, go to our Training Collateral Provider Guide.
4. Find, create, and apply flowsheets

Remember, flowsheets can be found in your “Settings” under “Charting”.

Within Flowsheets settings, you’ll be able to find community based flowsheets, create custom flowsheets and manage all flowsheets for Your Practice.
Once you’ve chosen or created your flowsheet, you can apply the flowsheet in three ways: individually, for certain providers or for all patients.

Apply flowsheet

Any changes to this practice flowsheet will update patient flowsheets unless customized in a patient chart. Learn more

- This flowsheet is only available to individual patient charts from the “Go to...” menu
- This flowsheet is automatically shown for patients of the following provider(s): Search
- This flowsheet is automatically shown for all patients

Once applied, you’ll see these flowsheets in the patient’s summary tab and within the patient’s encounter (SOAP) note(s).

Will lab values auto-populate, or will those need to be manually entered?
Your lab values will auto populate as long as you’re connected to one of our 300+ lab partners. If you’re not connected to a lab partner, you can add those values manually. Values will then populate when lab flowsheets are added. For more information on connecting with one of our integrated lab partners, see How do I sign up for a lab integration?

For the full charting workflow guide, go to our Training Collateral Provider Guide.

ADDITIONAL RESOURCES
ARTICLE: How do I use flowsheets?
ARTICLE: How do I choose the right lab observation for my flowsheet?
VIDEO: Easily track vital and lab trends with Flowsheets