

How to Add a Mini-Exam Template to a Note

We all know about templates that include HPI, ROS, exam, and treatment elements. But what if you are in your “Routine Follow-Up” template and a patient brings up a new problem – low back pain, headache, URI, or shoulder pain. This is a VERY common occurrence in primary care.

The Problem:

I need to add a complete low back pain exam to my general exam. Do I have to type or dictate the whole exam, or is there an easier way?

The Solution:

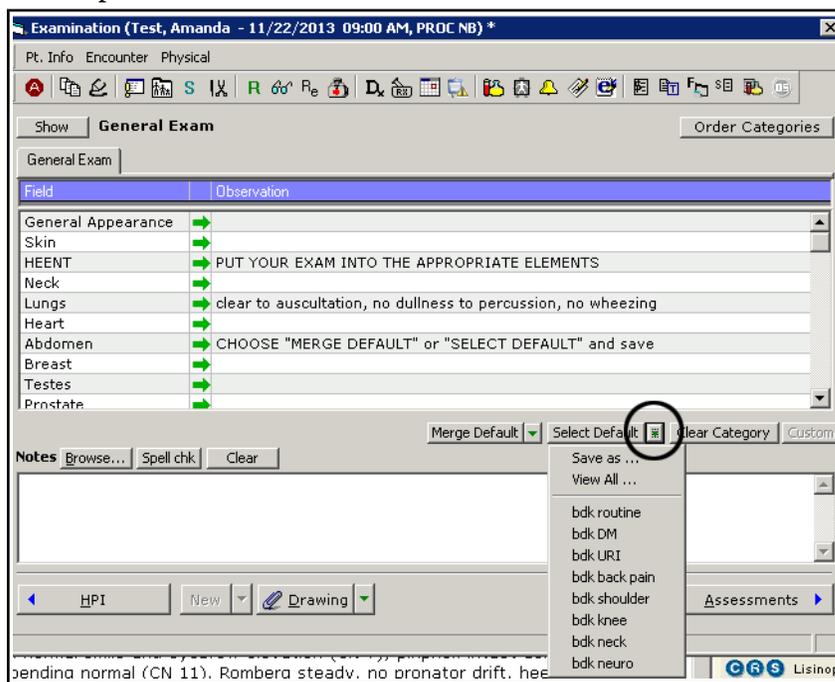
YES, there is an easier way.

First, you need to generate the mini-exam template.

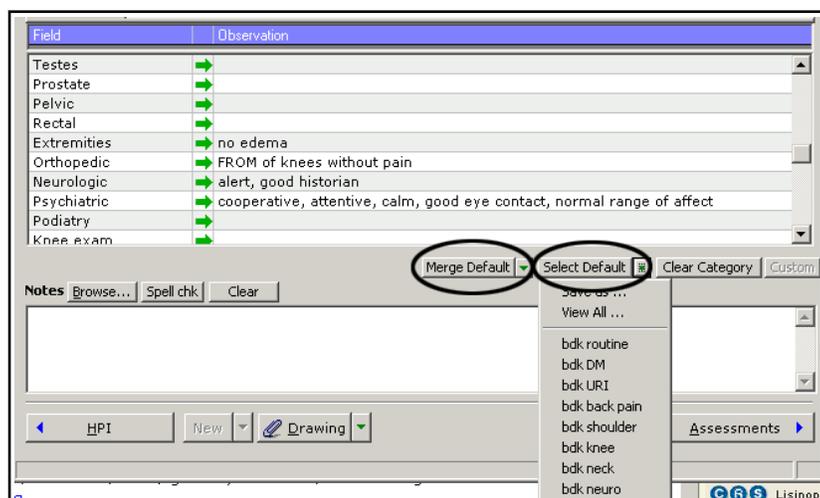
Open an EMPTY exam in a test patient – like Amanda Test shown here.

Generate the exam you want – by whatever means you usually use (type it, dictate it, pull it from the default choices).

Now save it by pulling down on the arrow next to “Select Default” or “Merge Default” and click “Save As” and give this exam a name. In the future, it will now show up as a drop-down choice under both “Merge Default” and “Select Default”.



In the patient visit example above, I wanted to add a typical low back exam to a general note.



To the left, you see a routine FU exam in the note.

Now, I can either MERGE the “bdb back pain” exam into the note – which will add to the ortho and neuro exam, or I can SELECT it (which is like the copy mode for full templates) and copy OVER the entire exam. In this example, I would click to caret on “Merge Default” and choose “bdb back pain”.

In ECW 9, the SELECT option did not wipe out the rest of the exam – only the exam elements included in the “bdk back pain” - neuro and ortho exams. In ECW 10, it wipes out everything except what is in “bdk back pain”. I have also noticed that in ECW 10, the “Merge” function does not work if there is any text in the section you are trying to alter. This appears to be a bug. In spite of these quirks to this tool, I find it quite useful.

In this example, you can see that my low back pain mini-exam template pulled in an ortho and neuro exam. What I like to do is make adjustments to the exam in the box to the right – then spellcheck it to get rid of the line breaks.

I purposely set up longer mini-template exams in this broken line-break way so it is easier to customize for the particular patient – it is just easier to see what needs to be altered to fit the actual patient exam. After you spellcheck, hit OK and the exam is done, and you saved yourself some time.

And there you have it. You can make as many of these little mini-exam templates as you want – they take no time at all to make. They are provider-specific – you don't need to worry about altering another provider's mini-exam templates – you can't!

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