

Clinical Templates

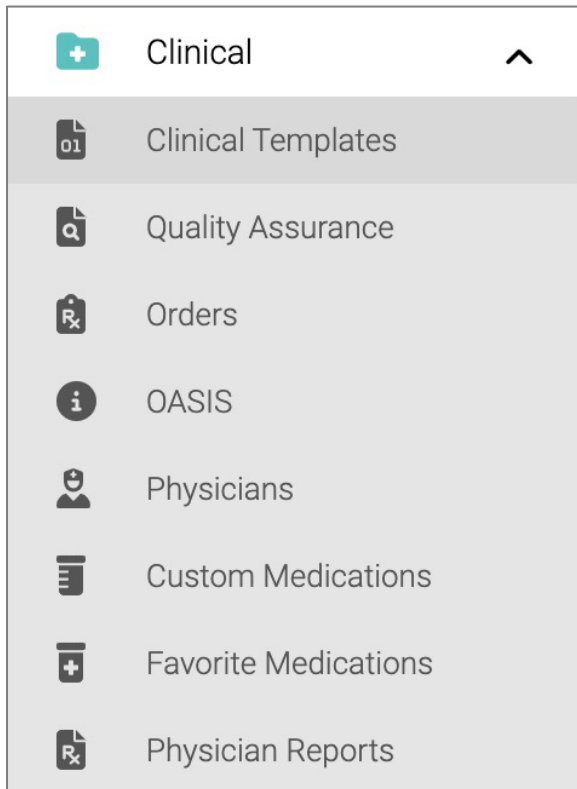
February 2023



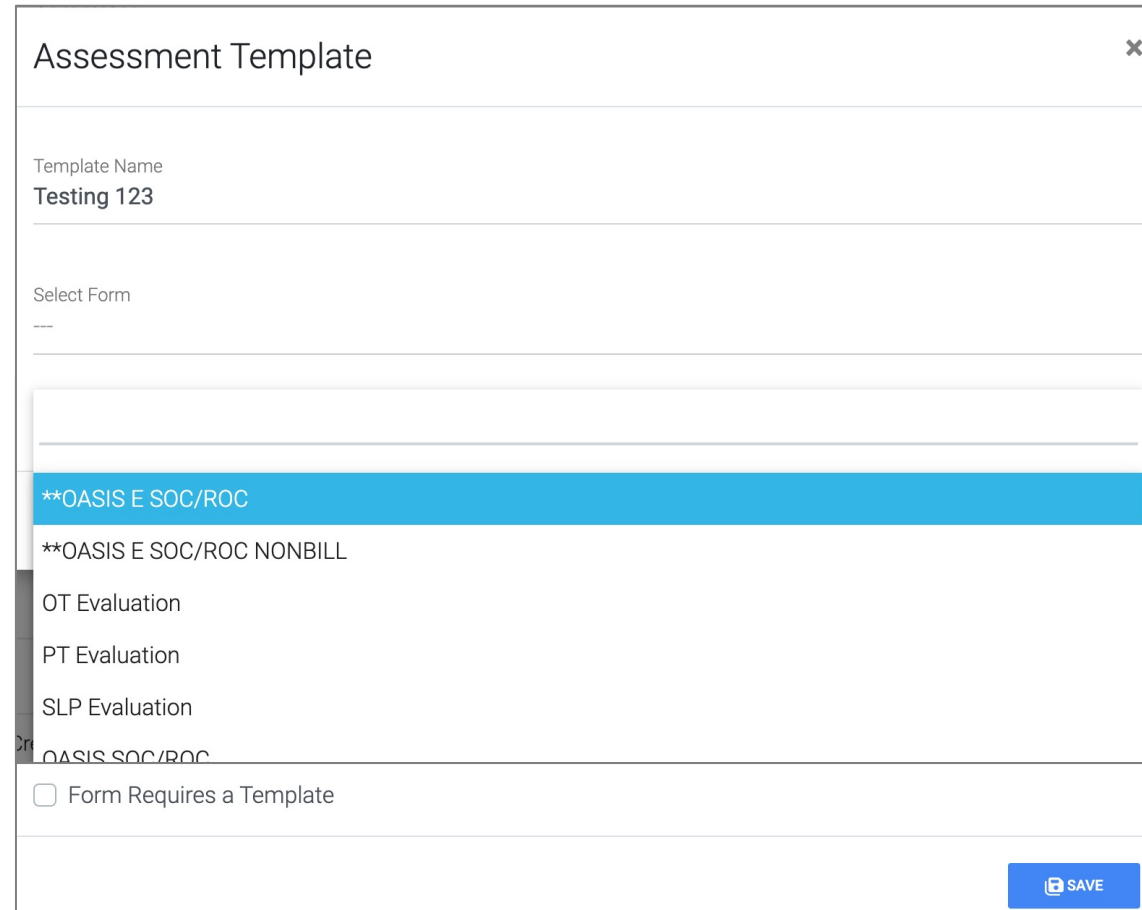
Clinical Templates

Create assessment templates in the new menu item, Clinical Templates.

[Clinical](#) > [Clinical Templates](#) > [+New](#) > [Select Form](#) > [Save](#)



A screenshot of a sidebar menu titled 'Clinical'. The menu items are: Clinical Templates (highlighted), Quality Assurance, Orders, OASIS, Physicians, Custom Medications, Favorite Medications, and Physician Reports. Each item has a small icon to its left.



A screenshot of the 'Assessment Template' form. The form has a title bar 'Assessment Template' with a close button. It contains a 'Template Name' field with the value 'Testing 123'. Below it is a 'Select Form' dropdown menu. The dropdown is open, showing a list of forms: '**OASIS E SOC/ROC' (highlighted in blue), '**OASIS E SOC/ROC NONBILL', 'OT Evaluation', 'PT Evaluation', 'SLP Evaluation', and 'OASIS SOC/ROC'. At the bottom of the form is a checkbox labeled 'Form Requires a Template' and a blue 'SAVE' button.

Optional: Check box to require the template to be used for a specific initial assessment form.



Clinical Templates

Clinicians performing an initial assessment may utilize a template from which to start. Interventions included in the template will automatically populate.

[Clients](#)> [List](#)> [Ellipsis](#)> [Chart](#)> [Assessments](#)> [+> Select assessment> Verify> Select template> Save](#)

Select Template

Assessment Template

PDN: G-Button only

SAVE

1. Click the + and select the form type for the initial assessment.
2. Verify the client by checking the box for at least two of the identifying characteristics.
3. A modal will pop up and allow the user to choose from templates in the list.
4. The assessment may then be customized by clicking on the pre-populated interventions.

Gastrointestinal

INTERVENTIONS

DATA POINTS

Search

+ 1-5 of 5 < >

Interventions

Feeding Tube Type: []. Feeding Tube Size: [].

SN To Change G-tube Every [] & PRN for Dislodgement or Blockage, or Assist PCG If Changing G-tube During Shift.

SN to flush GB with []

SN/PCG to perform G-tube care as follows: [] & PRN using clean technique, clean with soap and warm H2O, or normal saline to keep stoma clean, pat dry and place gauze dressing around site and PRN for excess drainage. Document condition of site.

SN to instruct patient/ PCG on proper gastrostomy site care.



Permissions: Clinical Templates

Permissions to Clinical Templates are in the Admin section of a user group's permissions. User groups may be given access to:

View

Access to Clinical Templates menu item

Edit

Ability to create, edit, & rename clinical templates

Delete

Ability to delete existing clinical templates

Clone

Ability to clone existing clinical templates

[Admin](#) > [Permissions](#) > [Select user group](#) > [Check boxes](#) > [Save](#)

ADMIN					
ADMIN AUDITTRAIL BILLING CALENDAR CLINICIAN DASHBOARD FAX INBOX PATIENT PCG RESET PERSON PHYSICIANS SERVICE CODES AND RATES					
USER NOTIFICATIONS TASKS					
	<input type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	<input type="checkbox"/> Clone	<input type="checkbox"/> Download
Billing Code Modifiers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Billing Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Branch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Clinical Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Clinician	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Custom Fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Custom Medications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Action options available to users in the ellipsis next to each clinical template will vary based on permissions.

