Clinical Templates

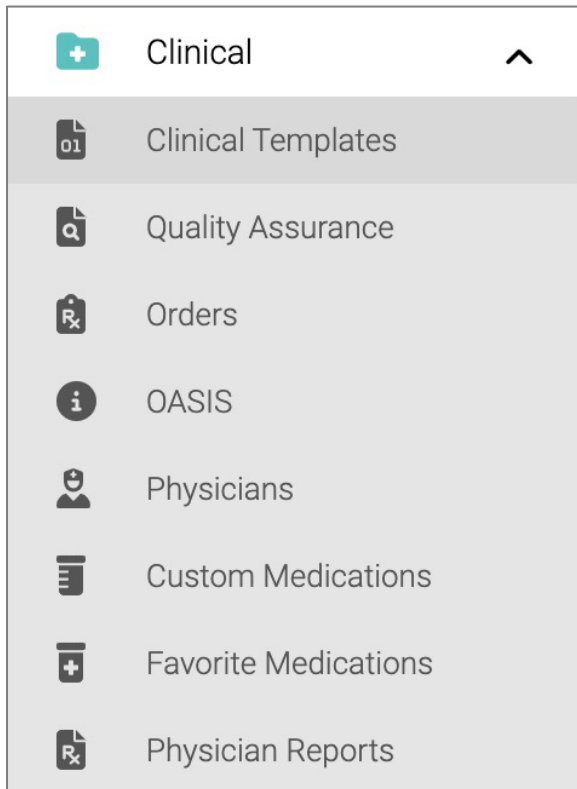**February 2023**
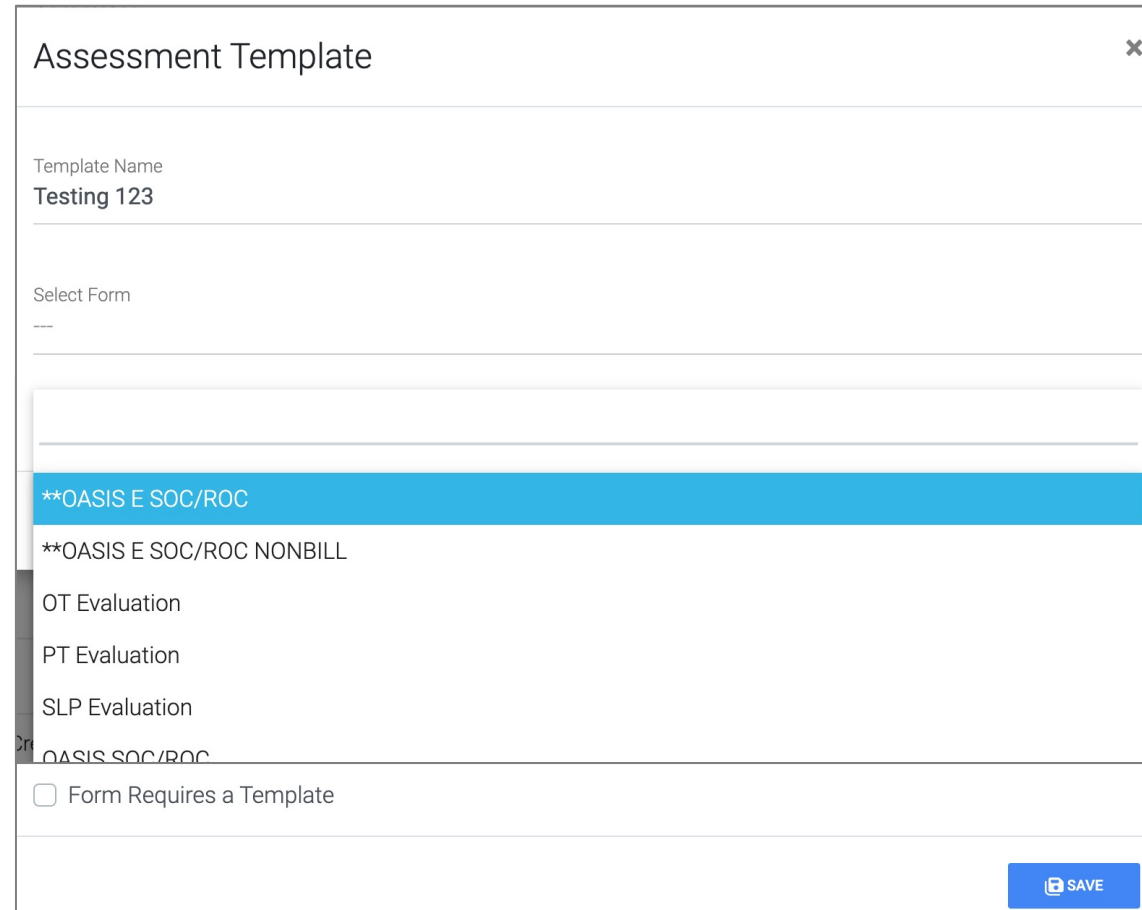
Clinical Templates

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

Clinical> Clinical Templates> +New> Select Form> Save

Clinical	∧
Clinical Templates	
Quality Assurance	
Orders	
OASIS	
Physicians	
Custom Medications	
Favorite Medications	
Physician Reports	

Assessment Template ✕

Template Name
Testing 123

Select Form

**OASIS E SOC/ROC

**OASIS E SOC/ROC NONBILL

OT Evaluation

PT Evaluation

SLP Evaluation

OASIS SOC/ROC

☐ Form Requires a Template

🖫 SAVE

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

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.

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.

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

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