

Customize Visit and Immunization Templates

With the flu season upon us, these steps below can be used to customize a Visit and Immunization template for the desired vaccine.

Visit Template

1. From the Dashboard, click on the Templates icon in the top right-hand corner of the screen.
2. Navigate to the Observation tab.
3. Click **New**.
4. Use the screen shot (picture) templates to build your own clinic version. See below example.

Template Management

Observation Template

Name: Ponderosa Flu Vaccine Car
 Category: Visit
 Order Type: Response
 Type: Response
 Edit Privilege: All Users
 Use Privilege: All Users
 Step: [dropdown]
 Benchmark: [dropdown]
 Creator: Hawes, Kelly
 Updated: 2020-11-04

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Subjective Note	influenza vaccination visit today outside in car. Please see immunization tab for immunization notes		10010				

Save

5. Make additional modifications to template as needed. Like adding the Lot# or Series#, Method etc.
6. Click Save at the bottom of the window. This will create a template.
7. Next navigate over to the Visit Template
8. Click **New**.
9. Use the screen shot (picture) templates to build your own clinic version. See below example.
10. Make sure to add the Observation template to your Visit template on the right-hand side drop down.
11. Click Save at the bottom of the window. This will create a template.

Template Management

Demog Visits Tasks Bills Meds Profile Labs Invest Consults Imm Appt CDS Filter Workflow Dashboards Obs

Visit

Visit Template

Template Name: Flu vaccine outside clinic
 Concern: [dropdown]

Assessment

Diagnosis: Need For Prophylactic \ V048
 Billing Item: Respiratory Immunizati\ 10041

Plan

Select Care Plan... [dropdown]

Disposition: [dropdown]
 Insurer: [dropdown]
 Date: 16-Oct-2020 06:06 AM
 Provider*: [dropdown]
 Assignee: All Users
 Bill Provider: [dropdown]
 Last Update: Taylor Grewal

Signed Off

Save

Observation Details & Usage

Workflow Step: [dropdown]
 Observation Template: Ponderosa Flu Vaccine Car
 Edit Privilege: All Users
 Use Privilege: All Users
 Usage: General
 Graph Template: Current Observation Set
 Print Type: Visit

** allows for auto documentation and auto billings, which saves time and maximizes revenue

Immunization Template

1. How to make an Observation template for Immunization
2. Navigate to the Observation tab.
3. Click **New**.
4. Use the screen shot (picture) templates to build your own clinic version. See below example. Add in the Manufacturer, series, expiry date, lot# and any other pertinent information.
5. Click Save at the bottom of the window. This will create a template.

Template Management Preview Refresh Menu

Observation Template

Name: Ponderosa Flu Vaccine -Fl
 Category: Immunization
 Order Type: Response
 Type: Immunization
 Edit Privilege: All Users
 Use Privilege: All Users
 Step:
 Description:
 Benchmark:
 Creator: Hawes, Kelly
 Updated: 2020-10-23

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Reason for Flu Vaccine	Yes		0				
Patient has had previous	Yes		0				
Patient has allergy to egg	No		0				
Patient has had adverse	No		0				
Flu Vaccine given	in vehicle		1				
Provider notes	Influenza vaccination visit		10				
Series #	20620214069576		12				
Lot #	F9SS3		13				
Manufacturer:	Glaxo Smith Kline Inc.		13				
Expiry #	June 2021		13				
Injection site:			14				
Method	IIM		15				
Observation Time:	15 minutes		16				
Observations			17				
Education	Patient was education on signs of symptoms of reaction Patient was educated on aftercare and what to watch for in case of adverse reaction Patient was given information sheet on above education. Patient was observed for 15 minutes in car following vaccine Patient gave verbal consent to received vaccine		18				

Save 📄

6. Navigate to the Immunization template and use the below to build your own clinic version.
7. Make sure to add the Observation template you made a above to attach to this new template.
8. Click Save at the bottom of the window. This will create a template.

Immunization template

Task

Task Template

Template Name: Fluviral

Category: Immunization

Description: Fluviral Flu Vaccine

Note / Instructions:

Progress Indicators:

Assignee*:
 Assign to user:
 Start: when due
 Due*: Today

Last Update: Kelly Hawes

Apply as Active
 Apply as Completed
 Apply as Cancelled

Urgency: Normal
 Recurrence: None

Save

Observation Details & Usage

Ordering Provider:
 Service Provider:

Billing Template:
 Workflow Step:
 Observation Template: Ponderosa Flu Vaccine - Fluviral*

Edit Privilege: All Users
 Use Privilege: All Users
 Usage: General
 Graph Template: Current Observation Set
 Print Type: Default Task