



## Setting up E/M Code Templates in QuicDoc®

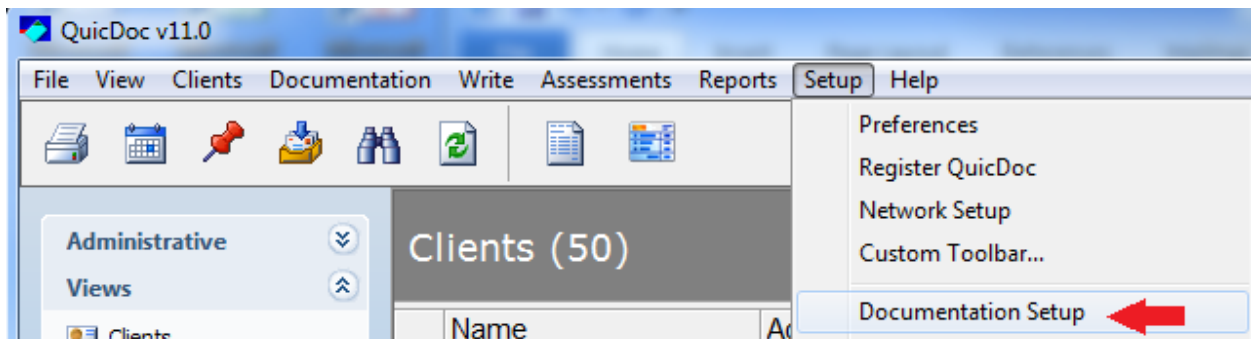
QuicDoc has added screens for the following sections for documentation for E/M Codes:

- History of Present Illness (HPI)
- Diagnosis - ICD-10 Diagnosis
- Past, Medical and Family History (Detailed and Short Versions)
- Mini Mental State Exam
- Medical Decision Making

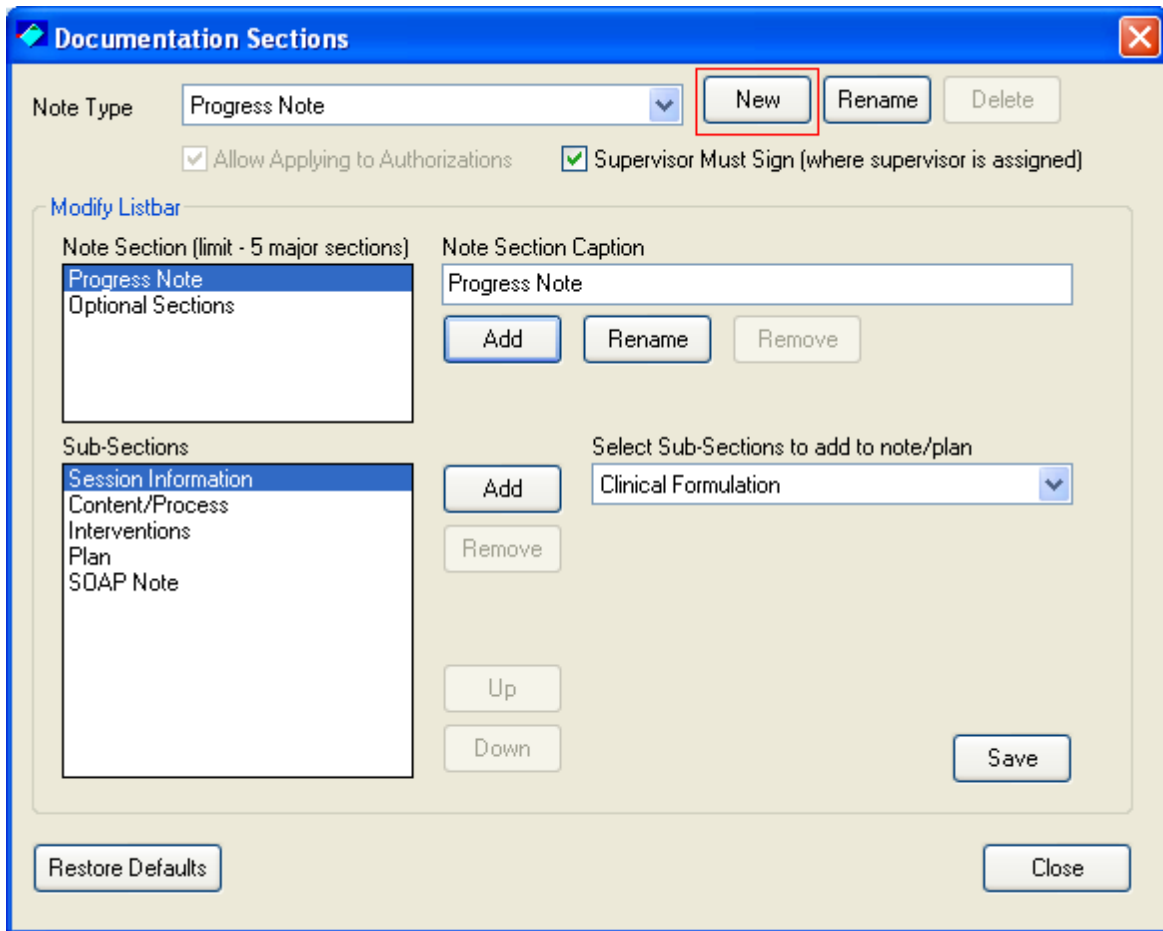
The Physical exam section has been updated to include entry for Sleep, Appetite, Tobacco Use, Alcohol/Drug Use. Other sections, already a part of QuicDoc, can also be used for E/M templates, including DSM and ICD Diagnosis, Medications, Review of Systems, and Mental Status.

In order to **Create a new template or Note Type**, logon to QuicDoc as the System Administrator.

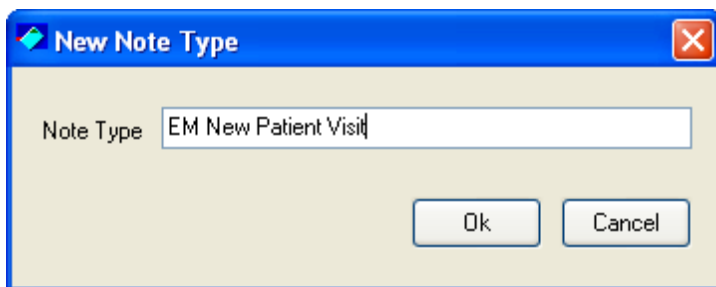
Select Documentation Setup from the Setup menu.



On the Documentation Sections screen, click **New**.



Enter a name for the Note Type (e.g. EM New Patient Visit, EM Established Patient Visit) and click **OK**.



Use the drop down Sections list to the right and select the sections to include for the note (i.e. HPI, ICD-9 Diagnosis or DSM-IV, Past Medical and Family History, Mental Status, Medical Decision Making, etc). Select each selection and click **Add**. You can re-order the sections by selecting them on the list to the left and using the Up and Down buttons.

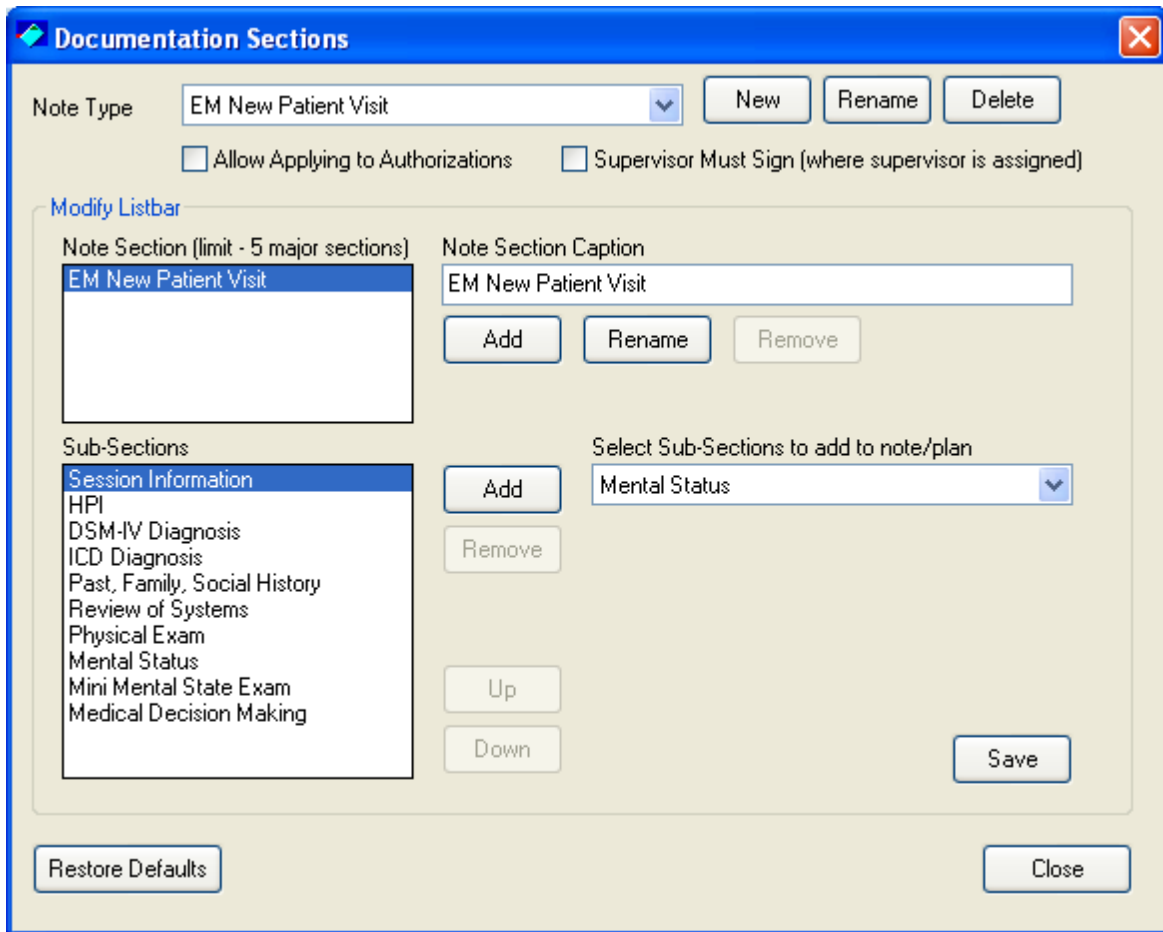
The screenshot shows a software window titled "Documentation Sections". At the top, there is a "Note Type" dropdown menu set to "EM New Patient Visit", with "New", "Rename", and "Delete" buttons to its right. Below this are two checkboxes: "Allow Applying to Authorizations" and "Supervisor Must Sign (where supervisor is assigned)".

The main area is titled "Modify Listbar" and is divided into two columns. The left column, "Note Section (limit - 5 major sections)", contains a list with "EM New Patient Visit" selected. The right column, "Note Section Caption", has a text field containing "EM New Patient Visit" and "Add", "Rename", and "Remove" buttons below it.

Below the "Note Section" list is the "Sub-Sections" list, which contains "Session Information" selected. To its right is a red-bordered box containing an "Add" button (labeled with a red "2") and a "Remove" button. To the right of this box is a dropdown menu titled "Select Sub-Sections to add to note/plan" (labeled with a red "1"). The dropdown menu is open, showing a list of sub-sections: "Clinical Formulation", "HPI" (which is highlighted), "ICD Diagnosis", "Identifying Information", "Interventions", "Marital/Relationship", "Medical Decision Making", and "Medical Information".

At the bottom of the window, there are "Up" and "Down" buttons for re-ordering sections, and a "Save" button on the far right.

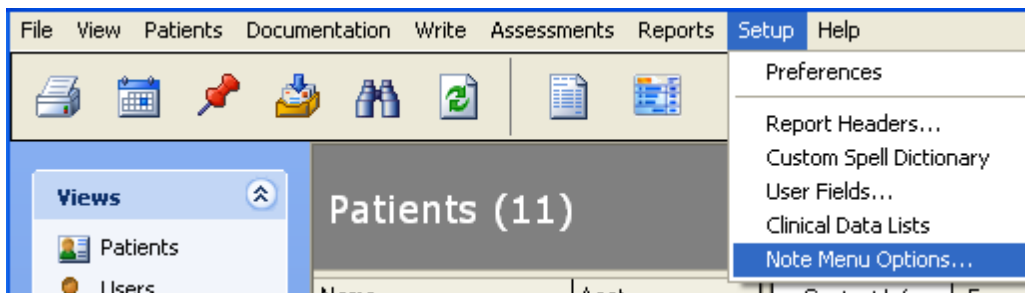
When you have completed adding sections for your note and ordered the sections as you want,



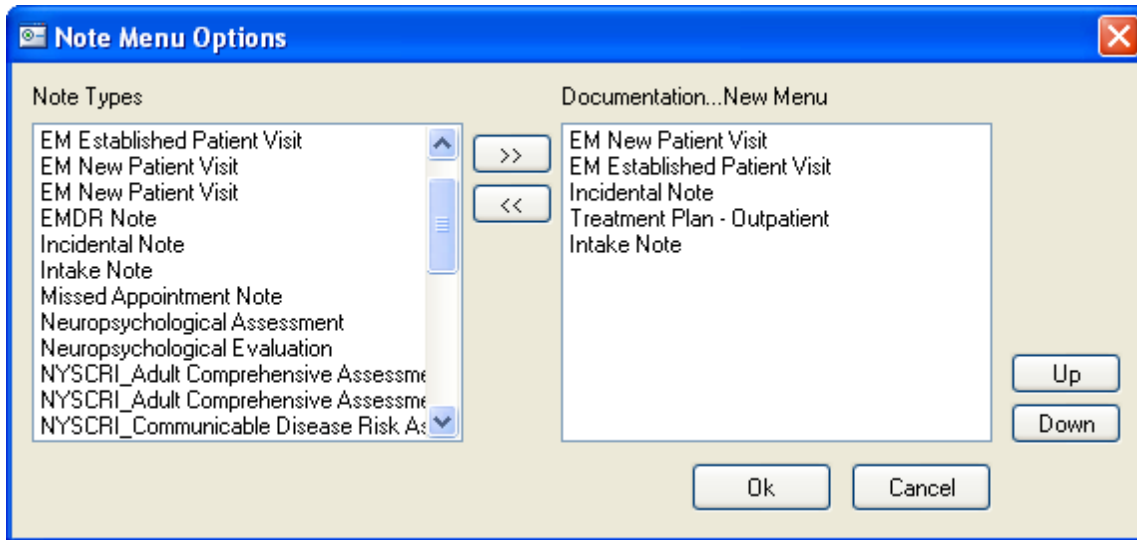
Repeat the process for an Established Visit Note or any other note type.

**Customize the Note Types that appear on the Documentation menu to just show the note types you use.**

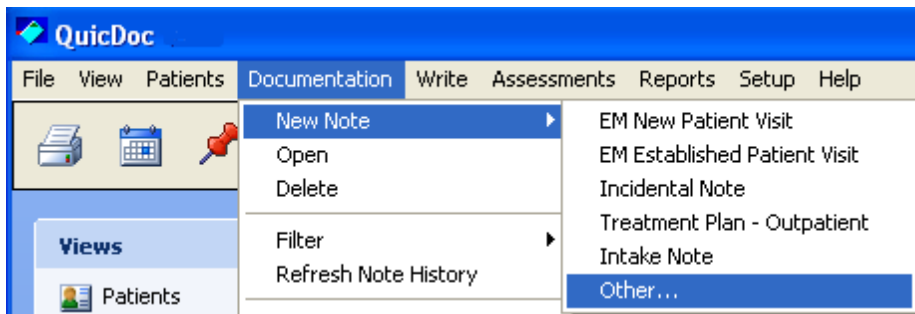
Log on with your User ID (not the SA) to create your own Note Menu.  
Select Note Menu Options from the Setup menu.



Select the note type from the list on the left that you want to appear on the menu and click the >> button. When you are done adding note types, click **OK**.



Now, when you select New Note from the Documentation menu, you will only see the note types you selected. You can still select another note type by selecting Documentation...New Note...Other.



### Adding Custom Sections to Notes

If you require additional information on your notes, or for customized note templates, you can use the User Forms feature in QuicDoc. (See article on **Creating your own screens/templates in QuicDoc**)