



# Framework Content - Everything You Need to Know About Configuring NextGen






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Questions 

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X	Question	Asker	Rec'd		Answer

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# eMedApps - About Us

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- Founded in 1999
- Working as partner with NextGen since 2001
- Worked as subcontractor for NextGen
- Serving healthcare clients across USA
- Services and Products for NextGen clients



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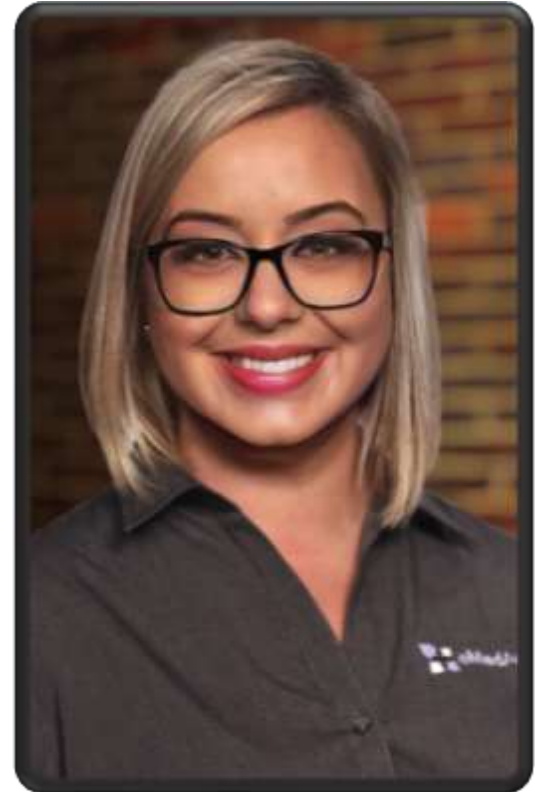


# About Our Presenter

# About our Presenter

## Yvette Bujak

Yvette has 14 years of experience with the NextGen product and is NextGen certified in EPM, EMR, Patient Portal, and ICS. She has over 17 years of experience in the healthcare industry. She is typically responsible for implementation, project management, template development, workflow design, training and support of the NextGen EHR product.





# Agenda

- What is Framework Content and why is it important?
- How do I access the configuration templates?
- What can be configured using Framework Content?
  - Tabs and Subnavigation
  - Reason for Visit
  - Review of Systems
  - Procedures
  - Medical Chart
  - Default Visit Specialty
  - Client Button Configuration (New in Spring 2021)
  - Assessment/Plan Navigation Configuration (New in Spring 2021)
  - Client Checkbox Configuration (New in Spring 2021)

# What is Framework Content and why is it important?

The Framework Content system template enables you to customize various elements of navigation and configure the content for certain panels at the specialty, practice, and provider levels.

Why is it important?

- Configure content to meet the needs of a specialty, practice or provider
- Configure templates to make workflows more efficient
- Configure necessary options and settings without compromising upgrade needs
- Configuration changes remain in the database and do not get overwritten in an upgrade



The screenshot displays a software interface with several components:

- Filters:** Specialty: Internal Medicine, Visit Type: Office Visit, Established/New: Established.
- Toggle:** Show Risk Indicators (ON).
- Navigation Bar:** Home, Intake (active), Histories, SOAP, Finalize, Checkout.
- Secondary Navigation:** Care Guidelines (8), Contagion Risk (1), CAD, DM, HTN, TOB, Global Days, Risk Level (0), Care Team.
- Footer:** Standing Orders, Adult Immunizations, Peds Immunizations, My Plan, Procedures, Order Management.



# How do I access the templates?

1. Log into the EHR
2. Click File > System \ Practice Template
3. Click "All" in the show menu
4. Click "OK"
5. Select \*Configuration Home
6. Select Framework Content

The screenshot illustrates the process of accessing templates in the EHR system. It shows three overlapping windows:

- Main Window:** The 'File' menu is open, and 'System \ Practice Template' is highlighted with a red box and a '2'. The 'Show' button at the bottom of the menu is also highlighted with a red box and a '3'.
- Select Template Dialog:** This dialog box is open, showing a list of templates. 'Configuration Home' is selected and highlighted with a red box and a '4'. The 'OK' button at the bottom is highlighted with a red box and a '5'.
- Framework Content Window:** This window is open, showing a list of configuration options. 'Framework Content' is highlighted with a red box and a '6'.

# Framework Content Template

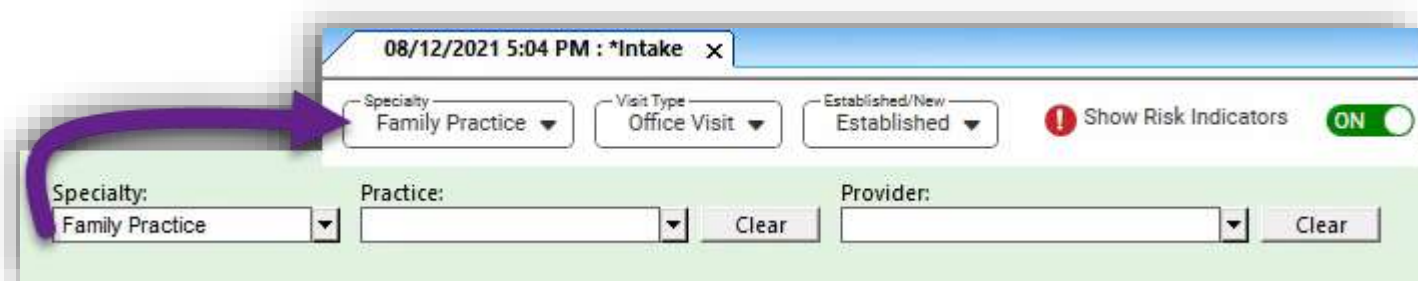
Specialty: Family Practice	Practice: 	Clear	Provider: 	Clear	Copy To Specialty: 	Practice: 	Clear	Provider: 	Clear	Copy
<b>Tabs and Subnavigation</b>										▼
Reason for Visit										▼
Physical Exam										▼
Review of Systems										▼
Medical / Family History										▼
Procedures										▼
Medical Chart										▼
Default Visit Specialty										▼
Client Button Configuration										▼
Assessment / Plan Navigation Configuration										▼
Client CheckBox Configuration										▼

**New in Spring  
2021**




# Framework Content Template

- Specialty
  - Allows you to select the specialty content you will be configuring
- Practice
  - Used in a multi-practice setting to set different configuration based on practice.
- Provider
  - Used to configure specific specialty content for a specific provider.
  - It is recommended that you apply configurations at the specialty level. Try to avoid the use of provider-based configurations, because it is difficult to maintain numerous setups.
  - However, it is recommended that provider-level configurations be used for providers of specialties not represented in NextGen. For example, Endocrinology and certain surgical sub-specialties.



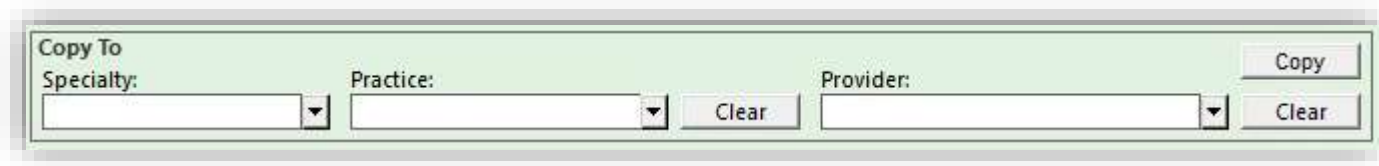
08/12/2021 5:04 PM : \*Intake x

Specialty: Family Practice ▾ Visit Type: Office Visit ▾ Established/New: Established ▾  Show Risk Indicators

Specialty: Family Practice ▾ Practice: ▾ Clear Provider: ▾ Clear

# Framework Content Template

- In the **Copy To** section content can be copied to another Specialty, Practice, or Provider.



Copy To

Specialty: Practice: Provider: Copy

Clear Clear

- Select the Specialty, Practice, and/or Provider and select Copy



# Framework Content Template – Tabs and Subnavigation

Specialty: Family Practice Practice: [ ] Specialty: Family Practice Visit Type: Office Visit Established Year: Established Show Risk Indicators: ON

Care Guidelines Contagion Risk CAD DN HTN TOB Global Docs Risk Level Care Team

Home Page Save Clear

Template: fts\_home\_page

Visit Type: Office Visit

Office Visit Intake (fts\_intake) Histories (fts\_histories) SOAP (fts\_soap) Finalize (fts\_finalize) Checkout (fts\_checkout) Chronic Conditions (fts\_chronic\_conditions) PRAPARE (NGKBM\_PRAPARE)

Office Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)	Chronic Conditions (fts_chronic_conditions)	PRAPARE (NGKBM_PRAPARE)
Patient Communication	Telephone Call (telephone_call)	Provider Test Action (provider_test_action)	Document Library (document_library)	Order Management (order_management)	Chart Abstraction (chart_abstraction)		
Physician Supervision (patient not present)	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Preventive Medicine	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Preventive Medicine Counseling	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Preventive Medicine-GRI	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Tobacco Cessation	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Transition into Care	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		

Sub Navigation Add Clear

Sub Nav 1	Sub Nav 2	Sub Nav 3	Sub Nav 4	Sub Nav 5	Sub Nav 6	Sub Nav 7
Caption	Caption	Caption	Caption	Caption	Caption	Caption
Tab Name	Template	Template	Template	Template	Template	Template
Home Page	Demographics (patient)	Call/Communication (provider_test_action)	Provider Test Action (provider_test_action)	Order Management (order_management)	Document Library (document_library)	Chart Abstraction (chart_abstraction)
Tab 1 (Intake)	Standing Orders (office_diagnostic)	Adult Immunizations (adult_immunizations)	Peds Immunizations (immunization_reG)	My Plan (ord_my_custom_plan)	Procedures (procedures_)	Order Management (order_management)



# Framework Content Template – Tabs and Subnavigation

## 1. Home Section

- Click and use the DB Picklist to select and update the home page that is launched from the Framework Content

## 2. Visit Type

- This includes a list of visit types that do not have tabs configured and where additional visit types can be added to specialty
- Each visit type is configured to a range of CPT codes which are used to calculate the E&M code on the Finalize template
- **NOTE:** Since the Finalize template in **Cardiology** and **Ophthalmology** specialties calculates the codes in a different manner, you cannot add visit types for these specialties through this process



# Framework Content Template – Tabs and Subnavigation

1. Home Section
2. Visit Types

Specialty: Family Practice Practice: Clear Provider: Clear Copy To: Specialty: Practice: Clear Provider:

### Tabs and Subnavigation

Update Delete Clear

	Tab 1	Tab 2	Tab 3	Tab 4	Tab 5	Tab 6	Tab 7
Office Visit	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)	Chronic Conditions (Rt_chronic_conditions)	PRAPARE (NABDM_PRAPARE)
Patient Communication	Telephone Call (Telephone_Call)	Provider Test Action (Provider_Test_Action)	Document Library (Document_Library)	Order Management (Order_Management)	Chart Abstraction (Chart_Abstraction)		
Physician Supervision (patient not present)	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		
Preventive Medicine	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		
Preventive Medicine Counseling	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		
Preventive Medicine-GH	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		
Tobacco Cessation	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		
Transition Into Care	Intake (Rt_intake)	Histories (Rt_histories)	SOAP (Rt_soap)	Finalize (Rt_finalize)	Checkout (Rt_checkout)		



# Framework Content Template – Tabs and Subnavigation

**Tab 3**

Type a label for the Caption you wish to update for the selected Specialty Visit Type

Visit Type	Template	Template	Template
Medicare Preventive	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
No-Show	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
Nurse Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
Office Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
Patient Communication	Telephone Call (telephone_call)	Provider Test Action (Provider_Test_Action)	Document Library (Document_Library)
Physician Supervision (patient not present)	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
Preventive Medicine	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)
Preventive Medicine Counseling	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)

**Dbp Templates**

Search for the template you wish to launch when the caption is selected

- PEDS\_SWYC\_MS\_Provider
- PEDS\_SWYC\_Parent
- peds\_uro\_antenatal\_consult
- PHI\_Log
- portal\_document\_posting
- pqr\_master
- prapare\_questionnaire
- preceptor
- preop\_visit
- pretherapy\_checklist
- Preventive\_Care
- proc\_chemodeneration
- Proc\_Colposcopy
- proc\_der\_mohs\_1
- proc\_der\_mohs\_2
- proc\_der\_mohs\_3
- proc\_der\_mohs\_4





# Framework Content Template – Tabs and Subnavigation

**Tabs and Subnavigation**

**Tabs** Update Delete Clear

Home Page	Tab 1	Tab 2	Tab 3	Tab 4	Tab 5	Tab 6	Tab 7
Template: fts_home_page <span>Save</span> <span>Clear</span>	Caption: Intake	Caption: Histories	Caption: PRAPARE	Caption: Finalize	Caption: [ ]	Caption: [ ]	Caption: [ ]
Visit Type: Nurse Visit	Template: fts_intake	Template: fts_histories	Template: fts_soap	Template: fts_finalize	Template: [ ]	Template: [ ]	Template: [ ]
Medicare Preventive	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
No-Show	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
<b>Nurse Visit</b>	<b>Intake (fts_intake)</b>	<b>Histories (fts_histories)</b>	<b>SOAP (fts_soap)</b>	<b>Finalize (fts_finalize)</b>	<b>Checkout (fts_checkout)</b>		
Office Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Patient Communication	Telephone Call (telephone_call)	Provider Test Action (Provider_Test_Action)	Document Library (Document_Library)	Order Management (order_management)	Chart Abstraction (chart_abstraction)		
Physician Supervision (patient not present)	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Preventive Medicine	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		
Preventive Medicine Counseling	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)		

**To remove a tab clear out the description and click Update**



# Framework Content Template – Tabs and Subnavigation

Specialty: Family Practice Practice: Clear Provider: Clear Copy To: Specialty: Practice: Clear Provider: Clear Copy

### Tabs and Subnavigation

**Update Delete Clear**

Home Page	Tab 1	Tab 2	SOAP	Tab 6	Tab 7
Template: fts_home_page Clear	Caption: Intake Template: fts_intake	Caption: Histories Template: fts_histories	Caption: SOAP Template: fts_soap	Caption: Template	Caption: Template
Visit Type: Post-Operative Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)		
Physician Supervision (patient not present)	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)		
Post-Operative Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Preventive Medicine	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Preventive Medicine Counseling	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Preventive Medicine-GYN	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Tobacco Cessation	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Transition into Care	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Virtual Visit Telephone	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Virtual Visit Video	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)
Well child	Intake (fts_intake)	Histories (fts_histories)	Pediatric SOAP	Finalize (fts_finalize)	Checkout (fts_checkout)

Are you sure you want to delete these records?  
Are you sure you want to delete all tabs for this visit type?  
Yes No

**To delete an unused Visit Type, Select the Visit Type Row and Click Delete**

**Sub Navigation**

Sub Nav 1	Sub Nav 2	Sub Nav 3	Sub Nav 4	Sub Nav 5	Sub Nav 6	Sub Nav 7
Caption: Template:	Caption: Template:	Caption: Template:	Caption: Template:	Caption: Template:	Caption: Template:	Caption: Template:
Tab Name: Template:	Template:	Template:	Template:	Template:	Template:	Template:

Add Clear



# Framework Content Template – Tabs and Subnavigation

**Callout 1:** Select the template you want to update the Subnavigation on

**Callout 2:** If you wish to update Subnavigation on a template, click the Visit Type

**Callout 3:** Update the Caption and Template. Click Update when done

Tabs								Update	Delete	Clear
Home Page	Tab 1	Tab 2	Tab 3	Tab 4			Tab 7			
Template fts_home_page	Caption Intake Template fts_intake	Caption Histories Template fts_histories	Caption SOAP Template fts_soap	Caption Finalize Template fts_finalize			Caption PRAPARE Template NGKSM_PRAPARE			
Visit Type Office Visit										
Medicare Preventive	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					
No-Show	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					
Nurse Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					
Office Visit	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)	Chronic Conditions	PRAPARE (NGKSM_PRAPARE)			
Patient Communication	Telephone Call (telephone_call)	Provider Test Action (Provider_Test_Action)	Document Library (Document_Library)	Order Management (order_management)	Chart Abstract (chart_abstract)					
Physician Supervision (patient not present)	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					
Preventive Medicine	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					
Preventive Medicine Counseling	Intake (fts_intake)	Histories (fts_histories)	SOAP (fts_soap)	Finalize (fts_finalize)	Checkout (fts_checkout)					

Sub Nav								Update	Delete	Clear
Sub Nav 1	Sub Nav 2	Sub Nav 3	Sub Nav 4	Sub Nav 5	Sub Nav 6	Sub Nav 7				
Caption Standing Orders Template office_diagnostic	Caption Adult Immunizations Template adult_immunizations	Caption Epid. Immunizations Template immunization_rec	Caption My Plan Template ord_my_custom_plan	Caption Procedures Template procedures	Caption Order Management Template order_management	Caption Document Library Template document_library	Caption Chart abstraction Template chart_abstraction			
Home Page	Demographics (patient)	Call/Communication (telephone_call)	Provider Test Action (provider_test_action)	Order Management (order_management)	Document Library (document_library)	Chart abstraction (chart_abstraction)				
Tab 1 (Intake)	Standing Orders (office_diagnostic)	Adult Immunizations (adult_immunizations)	Epid. Immunizations (immunization_rec)	My Plan (ord_my_custom_plan)	Procedures (procedures)	Order Management (order_management)	Document Library (document_library)			
Tab 2 (Histories)	Demographics (patient)	Order Management (order_management)	Document Library (document_library)	Chart Abstraction (chart_abstraction)	Screening Tools (screening_tools)	Social Det of Health (Social_Det_of_Health)	Document Library (document_library)			
Tab 3 (SOAP)	Standing Orders (office_diagnostic)	Adult Immunizations (adult_immunizations)	Screening Tools (screening_tools)	My Plan (ord_my_custom_plan)	Procedures (procedures)	Order Management (order_management)	Document Library (document_library)			
Tab 4 (Finalize)	Order Management (order_management)	Document Library (document_library)	Tobacco Cessation (tobacco_cessation)	Procedures (procedures)	Community Resources (community_resources)					
Tab 5 (Checkout)	Demographics (patient)	Order Management (order_management)	Document Library (document_library)	Tobacco Cessation (tobacco_cessation)						

# Framework Content – Reason for Visit

The Framework Content system template enables you to configure up to 14 chief complaints in the Reason for Visit section.

The screenshot displays the 'Reason for Visit' section of a medical software interface. At the top, there are dropdown menus for 'Specialty' (set to 'Family Practice') and 'Practice', along with a 'Clear' button. Below this is a 'Tabs and Subnavigation' bar with 'Reason for Visit' selected. The main area contains a filter section with 'Filter: all top' and a 'filter by gender' dropdown. A 'Reason for Visit' section includes 'Change Order' and 'Sort Alphabetically' checkboxes, and 'Add' and 'Clear' buttons. A table lists 12 items with columns for '#', 'Reason for Visit', and 'Gender'. A search modal is open, showing a search bar and a list of 12 items with checkboxes. A purple arrow points from the table to the search modal.

Specialty: Family Practice Practice: [ ] Clear

Reason for Visit

Filter: all top filter by gender: [ ]

Reason for Visit

Change Order  
 Sort Alphabetically

Add Clear

#	Reason for Visit	Gender
2	chest pain	A
3	diabetes	A
4	fatigue	A
5	depression	A
6	GERD	A
7	headache	A
8	hyperlipidemia	A
9	hypertension	A
10	back pain	A
11	medicare preventive	A
11	chronic conditions	A
12	Well child HPI	A

Reason for Visit

Chronic Conditions Standing Orders Comment

Select HPI ^

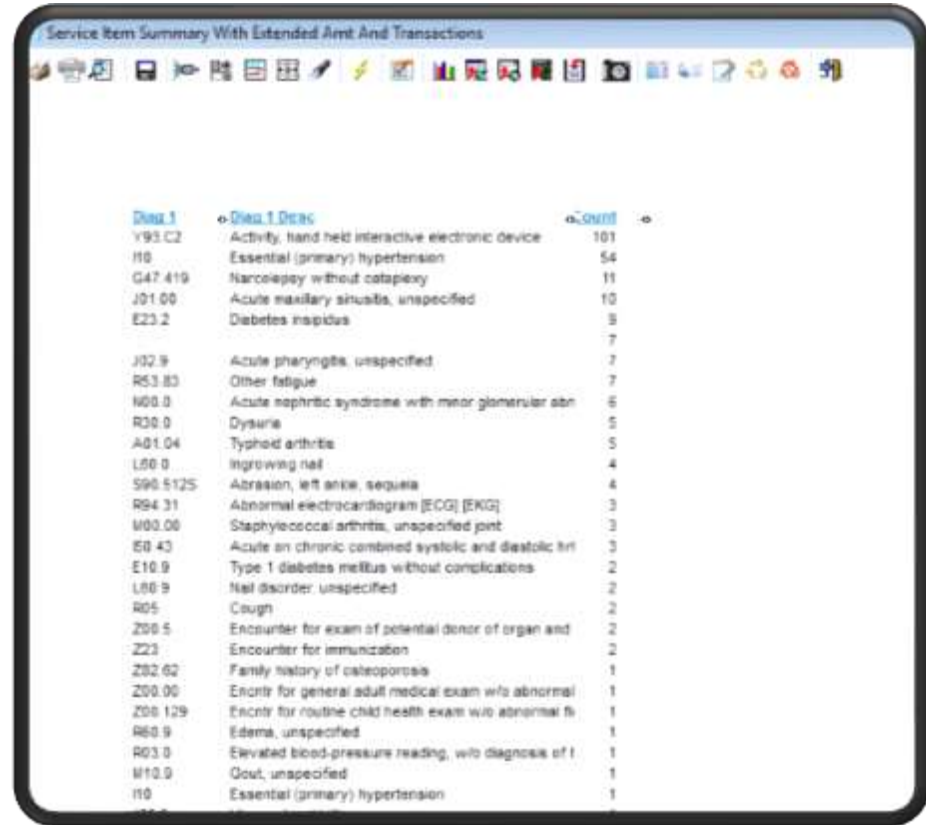
Search...

- chest pain
- fatigue
- GERD
- hyperlipidemia
- back pain
- chronic conditions
- diabetes
- depression
- headache
- hypertension
- medicare preventive
- Well child HPI

Clear Apply

# Framework Content – Reason for Visit

To help with identifying the specialties **Top 14** reasons for visit a **Service Item Summary** report can be ran from the **EPM**. If you are a multi-specialty practice multiple reports can be ran including those providers.



Diag. 1	o-Diag. 1 Descs	Count
Y93.C2	Activity, hand held interactive electronic device	101
I10	Essential (primary) hypertension	54
G42.419	Narcolepsy without cataplexy	11
J01.00	Acute maxillary sinusitis, unspecified	10
E23.2	Diabetes insipidus	9
		7
J02.9	Acute pharyngitis, unspecified	7
R53.83	Other fatigue	7
I60.0	Acute nephritic syndrome with minor glomerular abn	6
R30.0	Dysuria	5
A01.04	Typhoid arthritis	5
L50.0	Ingrowing nail	4
S90.512S	Abrasion, left ankle, sequela	4
R94.31	Abnormal electrocardiogram [ECG] [EKG]	3
I60.00	Staphylococcal arthritis, unspecified joint	3
E04.3	Acute or chronic combined systolic and diastolic hrt	3
E10.9	Type 1 diabetes mellitus without complications	2
L80.9	Nail disorder, unspecified	2
R05	Cough	2
Z00.5	Encounter for exam of potential donor of organ and	2
Z23	Encounter for immunization	2
Z82.62	Family history of osteoporosis	1
Z00.00	Encntr for general adult medical exam w/o abnormal	1
Z00.129	Encntr for routine child health exam w/o abnormal fi	1
R60.9	Edema, unspecified	1
R03.0	Elevated blood-pressure reading, w/o diagnosis of h	1
M10.0	Gout, unspecified	1
I10	Essential (primary) hypertension	1



# Framework Content – Reason for Visit

Filter	Description
All	Include all the reasons for visit for the specialty currently selected.
Top	Includes only the selected top reasons for visit for the selected specialty (up to 14 are allowed). An item must exist on the all list before you can add it to the top list.
Filter by gender	Filters complaints by all (A), female (F), male (M), undifferentiated (O), and unknown (U).

# Framework Content – Reason for Visit

To add a top reason for visit you must first add it to the **all** list.

The screenshot displays a software interface for managing 'Reason for Visit' data. At the top, there are dropdown menus for 'Specialty' (set to 'Family Practice'), 'Practice', and 'Provider', each with a 'Clear' button. Below this is a 'Copy To Specialty' field. The main section is titled 'Reason for Visit' and includes a 'Filter' dropdown set to 'all' (with 'top' also visible), a 'filter by gender' dropdown, and checkboxes for 'Change Order' and 'Sort Alphabetically'. There are 'Add' and 'Clear' buttons. A table lists 14 reasons for visit, all with a gender of 'A'. The 'abnormal PAP' entry is highlighted. An 'Udp Custom Link Filter' dialog box is open, showing a table with columns 'caption', 'template\_name', and 'specialty'. The 'abnormal PAP' entry is selected in this dialog, and the 'OK' button is highlighted.

caption	template_name	specialty
abdominal discomfort	HPI_AbdomenA	ALL
abdominal mass	hpi_abdominal_mass	ALL
abdominal pain	abdominal_pain_qv_subj	Family Practic
Abdominal pain	HPI_AbdomenA	ALL
Abdominal symptoms	HPI_AbdomenA	ALL
Abdominal/Ventral Hernia	hpi_hernia	ALL
abnormal bleeding	hpi_gyn_bleed	ALL
abnormal GI study	HPI_Abn_GI_Study	ALL
abnormal mammogram	hpi_breast	ALL
Abnormal Movements	hpi_abn_movements	ALL
abnormal pap	HPI_Abnormal_Pap	Family Practic
abnormal PAP	HPI_Abnormal_Pap	ALL
abnormal PAP smear	HPI_Abnormal_Pap	ALL
Abnormal Pulmonary Study	HPI_Abn_PUL_Study	ALL
Abnormal Study	HPI_Abn_PUL_Study	ALL

# Framework Content – Reason for Visit

When adding a new Reason for Visit you can specify the gender for the Reason for Visit

The screenshot shows a web application window titled "Reason for Visit". At the top, there are filter options: "Filter: all top" and "filter by gender: [dropdown]". Below this is a section for adding new reasons, with checkboxes for "Change Order" and "Sort Alphabetically", and "Add" and "Clear" buttons. A "Submenus" section is also present with the text "Display submenu value before/after reason for visit." Below the filters is a table with columns for "#", "Reason for Visit", and "Gender". The table lists 14 items, with "abnormal PAP" selected in the first dropdown. A "Gender" dropdown menu is open, showing options: "All", "Female", "Male", "Undifferentiated", and "Unknown".

#	Reason for Visit	Gender
1	abdominal pain	A
2	abnormal pap	A
3	abrasion(s)	A
4	adrenal problems	A
5	allergies	A
6	amenorrhea	A
7	anemia	A
8	anxiety	A
9	arthralgias	A
10	asthma	A
11	back pain	A
12	behavior problems (peds)	A
13	bipolar disorder	A
14	bite(s)	A



# Framework Content – Reason for Visit

To add a Reason for Visit to the Top list:

- Click on **top**
- Click to launch the picklist
- Select the **Reason for Visit** you wish to add
- Click **OK**
- Click **Add**

The screenshot shows two overlapping dialog boxes. The 'Reason for Visit' dialog is on the left, and the 'Udp Fc Non Top Items' dialog is on the right.

**Reason for Visit Dialog:**

- Filter:  all  top
- filter by gender:
- Reason for Visit:
- Change Order
- Sort Alphabetically
- Buttons: Add, Clear
- Table:

#	Reason for Visit	Gender
2	chest pain	A
3	diabetes	A
4	fatigue	A
5	depression	A
6	GERD	A
7	headache	A
8	hyperlipidemia	A
9	hypertension	A
10	back pain	A
11	medicare preventive	A
11	chronic conditions	A
12	Well child HPI	A

**Udp Fc Non Top Items Dialog:**

- Table with columns: caption, gender, Sub Menu1, Placement1, Sub Menu2, Placement2
- Buttons: Refresh, OK, Cancel

# Framework Content – Reason for Visit

If a reason for visit is *missing* from the *all* list it must be added in the **Manage Template Links System Template**.

The screenshot shows the 'Manage Custom Links' interface. On the left is a 'Configuration Navigation' sidebar with 'Manage Template Links' highlighted. The main area is titled 'Manage Custom Links' and contains a table of link configurations. At the top right of the main area is a 'Save and Close' button. Below the table are 'Add', 'Update', and 'Delete' buttons.

Link From	To Launch	Gender	Age	Specialty	Specialty Abbr	Filter
abdominal pain	abdominal_pain_qv_subj	all	all	Internal Medicine	IM	hpi
abrasion(s)	hpi_injury	all	all	Internal Medicine	IM	hpi
anxiety	hpi_mood_disorders	all	all	Internal Medicine	IM	hpi
arthralgias	hpi_mu_pain	all	all	Internal Medicine	IM	hpi
back pain	hpi_back_pain	all	all	Internal Medicine	IM	hpi

# Framework Content – Reason for Visit

To Remove a Reason for Visit from the list

- Click on the **Reason for Visit** you wish to remove
- Click **Delete**

The screenshot shows a web interface titled "Reason for Visit". At the top, there are filter options: "Filter: all top" (with "top" selected) and "filter by gender:" with a dropdown menu. Below the filters, there are checkboxes for "Change Order" and "Sort Alphabetically", and buttons for "Delete" and "Clear". A search bar contains the text "diabetes". Below the search bar is a table with the following data:

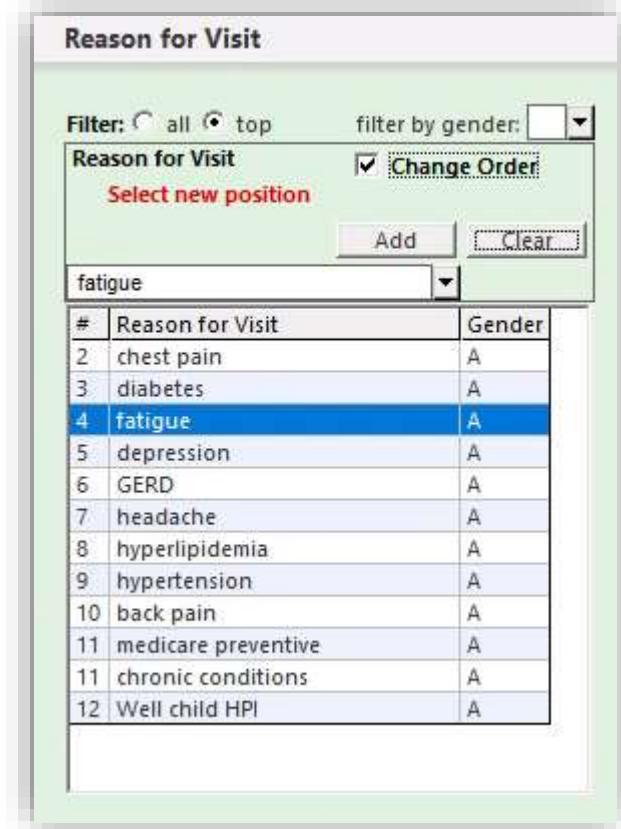
#	Reason for Visit	Gender
2	chest pain	A
3	diabetes	A
4	fatigue	A
5	depression	A
6	GERD	A
7	headache	A
8	hyperlipidemia	A
9	hypertension	A
10	back pain	A
11	medicare preventive	A
11	chronic conditions	A
12	Well child HPI	A

The row for "diabetes" (row 3) is highlighted in blue, and the "Delete" button is also highlighted with a purple box.

# Framework Content – Reason for Visit

Change the order of Reason for Visit

- Select the **Change Order** check box
- Highlight the **row** in the grid to be moved to a new position
- **Click** the desired row to set the new position



The screenshot shows a web interface titled "Reason for Visit". At the top, there is a "Filter:" section with radio buttons for "all" and "top", and a "filter by gender:" dropdown menu. Below this is a "Reason for Visit" section with a checked "Change Order" checkbox and a "Select new position" label. There are "Add" and "Clear" buttons. A dropdown menu shows "fatigue" selected. Below is a table with columns "#", "Reason for Visit", and "Gender". The row with "# 4" and "fatigue" is highlighted in blue.

#	Reason for Visit	Gender
2	chest pain	A
3	diabetes	A
4	fatigue	A
5	depression	A
6	GERD	A
7	headache	A
8	hyperlipidemia	A
9	hypertension	A
10	back pain	A
11	medicare preventive	A
11	chronic conditions	A
12	Well child HPI	A

# Framework Content – Reason for Visit

To Sort Alphabetically  
click Sort  
Alphabetically and  
the Reason for Visit  
will auto-sort

The screenshot shows a web interface titled "Reason for Visit". At the top, there is a "Filter:" section with radio buttons for "all" and "top", and a "filter by gender:" dropdown menu. Below this is a search bar containing the text "fatigue". A purple box highlights a checkbox labeled "Sort Alphabetically" which is checked. Below the search bar is a table with three columns: "#", "Reason for Visit", and "Gender". The table contains 12 rows of data, sorted alphabetically by the "Reason for Visit" column.

#	Reason for Visit	Gender
1	back pain	A
2	chest pain	A
3	chronic conditions	A
4	depression	A
5	diabetes	A
6	fatigue	A
7	GERD	A
8	headache	A
9	hyperlipidemia	A
10	hypertension	A
11	medicare preventive	A
12	Well child HPI	A



# Framework Content – Reason for Visit

## Reason for Visit **Submenu**

- Sub-menus allow you to make another selection to further your initial selection. A second selection, in some cases, even a third selection appears. This enables the practice to have a shorter list of reasons for visit. For example, instead of having two reasons that include initial or follow-up, you can add sub-menus initial and follow-up to a reason for visit to indicate whether the visit is initial or follow-up.

# Framework Content – Reason for Visit

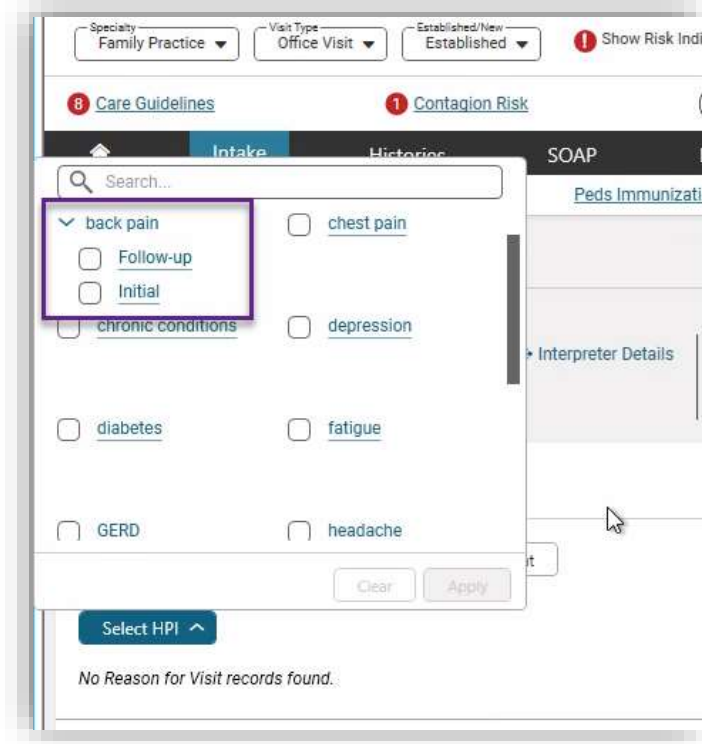
To add a sub-menu:

- Set the filter to **all**
- Highlight a complaint in the **grid**
- In the **Submenus** section, click **before** and type items in the fields (for example, left, right, and/or bilateral).

The screenshot displays the 'Reason for Visit' interface. At the top, there is a filter section with 'Filter: all' selected and 'filter by gender:' set to a dropdown menu. Below this is a table with columns for '#', 'Reason for Visit', and 'Gender'. The row for 'back pain' is highlighted in blue. To the right of the table is a 'Submenus' configuration panel. This panel includes options to 'Change Order' and 'Sort Alphabetically', and buttons for 'Update', 'Delete', and 'Clear'. The 'Submenus' section is divided into 'Submenu 1' and 'Submenu 2', each with 'before' and 'after' radio button options and several text input fields. The 'Update' button and the 'Submenus' panel are highlighted with a purple border.

#	Reason for Visit	Gender
1	abdominal pain	A
2	abnormal pap	A
3	abrasion(s)	A
4	adrenal problems	A
5	allergies	A
6	amenorrhea	A
7	anemia	A
8	anxiety	A
9	arthralgias	A
10	asthma	A
11	back pain	A
12	behavior problems (peds)	A
13	bipolar disorder	A
14	bite(s)	A

# Framework Content – Reason for Visit



Specialty: Family Practice | Visit Type: Office Visit | Established/New: Established | Show Risk Indi

Care Guidelines | Contagion Risk

Intake | Histori | SOAP

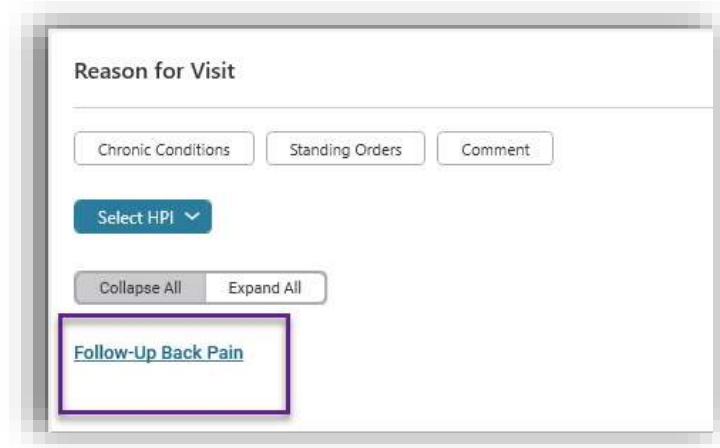
Search...

- back pain
  - Follow-up
  - Initial
- chest pain
- chronic conditions
- depression
- diabetes
- fatigue
- GERD
- headache

Clear | Apply

Select HPI ^

No Reason for Visit records found.



Reason for Visit

Chronic Conditions | Standing Orders | Comment

Select HPI v

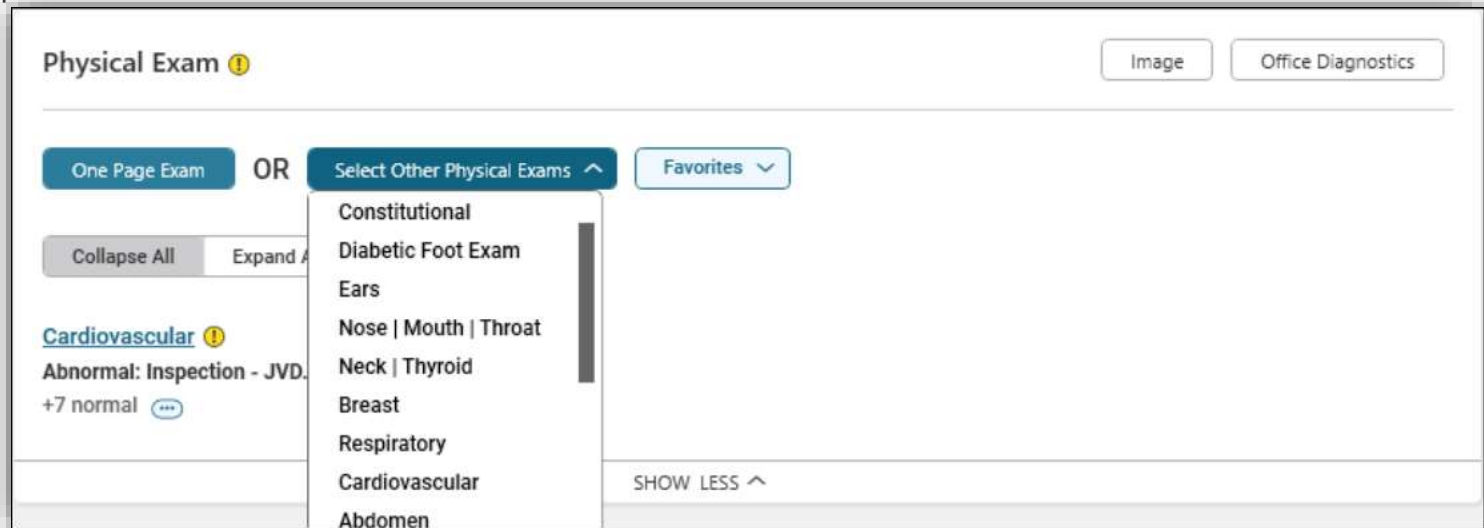
Collapse All | Expand All

**Follow-Up Back Pain**



# Framework Content – Physical Exam

Exams that are included in the **top 14** are available on the SOAP template in the Physical Exam section when you click other Physical Exams. The **all** are available in the additional option.



The screenshot displays a software interface for a physical exam. At the top, the title "Physical Exam" is followed by a warning icon and two buttons: "Image" and "Office Diagnostics". Below the title, there are three main options: "One Page Exam", "OR", and "Select Other Physical Exams" (which is currently selected and has a dropdown arrow). To the right of "Select Other Physical Exams" is a "Favorites" button with a dropdown arrow. Below these options, there are "Collapse All" and "Expand All" buttons. A section titled "Cardiovascular" with a warning icon shows "Abnormal: Inspection - JVD." and "+7 normal" with a menu icon. The "Select Other Physical Exams" dropdown menu is open, listing the following categories: Constitutional, Diabetic Foot Exam, Ears, Nose | Mouth | Throat, Neck | Thyroid, Breast, Respiratory, Cardiovascular, and Abdomen. A "SHOW LESS" button is located at the bottom of the dropdown menu.



# Framework Content – Physical Exam

You can configure your Physical Exam lists on the Framework Content system template. The two types of lists available to configure are:

1. **All** - all of the configured exams
2. **Top** – list of the **top 14** exams that the practice used most frequently and appear in the left pane in the Physical Exam section.



# Framework Content – Physical Exam

Filter	Description
All	Includes all of the physical exams for the currently selected specialty. The Submenus sections appears when you select the all radio button.
Top	Includes only the selected top physical exams for the specialty (up to 14 are allowed). The physical exam value must exist on the all list before it can be added to the top list.
Filer by gender	Filters the physical exams by all (A), female (F), male (M), Undifferentiated (O), and unknown (U).

# Framework Content – Physical Exam

To add a Physical Exam:

- Click **all**
- Select the **gender** from the filter by gender list
- Click the field above the **Physical Exam** Item column of the grid to select an item from the list.
- Select an item and click **OK**
- Click **Add**

The screenshot shows a software interface titled "Physical Exam". At the top, there are radio buttons for "all" (selected) and "top", and a "filter by gender:" dropdown menu. Below this is a "Physical Exam" section with checkboxes for "Change Order" and "Sort Alphabetically", and "Add" and "Clear" buttons. A dropdown menu is open, showing a list of physical exam items: "Carpal Tunnel - Left", "Neck | Thyroid", "Musculoskeletal", "Breast", "Psychiatric", "Nose | Mouth | Throat", "Respiratory", "Cardiovascular", "Ears", "Genitourinary", "Constitutional", "Abdomen", "One Page Exam", "Skin | Hair", and "Head | Face". A "Gender" dropdown menu is also open, showing options: "All", "Female", "Male", "Undifferentiated", and "Unknown". Below the gender menu are radio buttons for "before" and "after", and several empty input fields.

#	Physical Exam Item	Gender
1	Neck   Thyroid	A
1	Musculoskeletal	A
1	Breast	A
1	Psychiatric	A
1	Nose   Mouth   Throat	A
1	Respiratory	A
1	Cardiovascular	A
1	Ears	A
1	Genitourinary	A
1	Constitutional	A
1	Abdomen	A
1	One Page Exam	A
2	Skin   Hair	A
3	Head   Face	A

\*\*Physical Exam values are typically organized from head-to-toe by system

# Framework Content – Physical Exam

To configure the top 14 Physical Exams:

- Set the **Filter** to **top**
- Click the field above the **Physical Exam Item** column of the grid
- Select an item from the list and click **OK**
- Click to add the new item appears in the **Physical Exam** grid

Physical Exam

all  top filter by gender:

Physical Exam  Change Order  Sort Alphabetically

#	Physical Exam Item	Gender
1	One Page Exam	A
2	Constitutional	A
3	Diabetic Foot Exam	A
4	Ears	A
5	Nose   Mouth   Throat	A
6	Neck   Thyroid	A
7	Breast	A
8	Respiratory	A
9	Cardiovascular	A
10	Abdomen	A
11	Genitourinary	A
12	Skin   Hair	A
13	Musculoskeletal	A
14	Psychiatric	A

# Framework Content – Physical Exam

To delete a Physical Exam

- Select a row from the grid
- Click **Delete**

Physical Exam

all  top filter by gender:

Physical Exam  Change Order  Sort Alphabetically

Ears

#	Physical Exam Item	Gender
1	One Page Exam	A
2	Constitutional	A
3	Diabetic Foot Exam	A
4	Ears	A
5	Nose   Mouth   Throat	A
6	Neck   Thyroid	A
7	Breast	A
8	Respiratory	A
9	Cardiovascular	A
10	Abdomen	A
11	Genitourinary	A
12	Skin   Hair	A
13	Musculoskeletal	A
14	Psychiatric	A

# Framework Content – Physical Exam

To enable a gender neutral Physical Exam

- Click on Practice Configuration
- Scroll down to the SOGI/Transgender section
- Check Enable Gender Neutral PE
- If a Gender Neutral ROS is desired check this box as well

The screenshot displays the 'Practice Configuration' interface. On the left, a navigation menu has 'Practice Configuration' highlighted with a red box. The main content area is divided into sections. The 'SOGI/Transgender' section is highlighted with a red box and contains the following settings:

Setting	Description	Status
Physician to be used for consultation	This enables panel version of social history for pediatric	<input type="checkbox"/>
Enable gender neutral PE	The selected pronoun will be used in all the consultation. If no selection is made, pronoun from both sex will be used.	<input checked="" type="checkbox"/>
Enable gender neutral ROS	Checked will enable Gender Neutral workflow by showing tabs to toggle between Male/Female physical exam regardless of birth sex. It will also show links on the One Page General exam for this workflow.	<input checked="" type="checkbox"/>
Enable Detailed Sexual History	Checked will enable Gender Neutral workflow by showing tabs to toggle between Male/Female review of system regardless of birth sex. One page Gender Neutral ROS can be configured to search from Configuration Home, Framework Content, Review of System.	<input checked="" type="checkbox"/>
Document:	Checked will enable tabs to access Detailed Sexual History from Confidential History - Sexual Practices/ROS template	<input checked="" type="checkbox"/>
	Show Sexual Orientation Gender Identity details in the patient header section.	<input type="checkbox"/>

Below the SOGI/Transgender section, there is a search bar and a 'Clear' button. Two checkboxes are highlighted with red boxes:

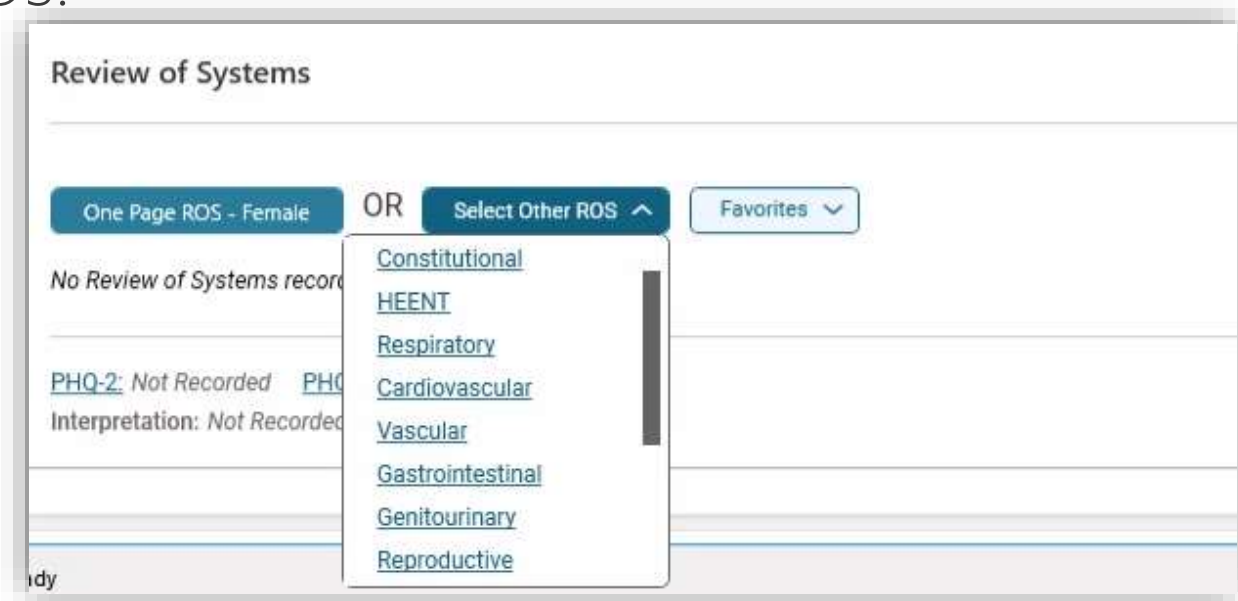
- Enable Gender Neutral PE
- Enable Gender Neutral ROS

At the bottom, there is a section for 'Include the following information on these documents' with a table of checkboxes:

	Master Documents	Patient Plan	Both
Birth Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Current Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender Identity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prefixed Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prefixed Pronoun	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# Framework Content – Review of Systems

This section will allow you to configure what displays for the specialty within the **Review of Systems** Panel. Just as in Reason for Visit and Physical Exam you are allowed up to 14 top ROS.



**Review of Systems**

One Page ROS - Female OR Select Other ROS ^ Favorites v

No Review of Systems record

PHQ-2: Not Recorded PHQ-9: Not Recorded

Interpretation: Not Recorded

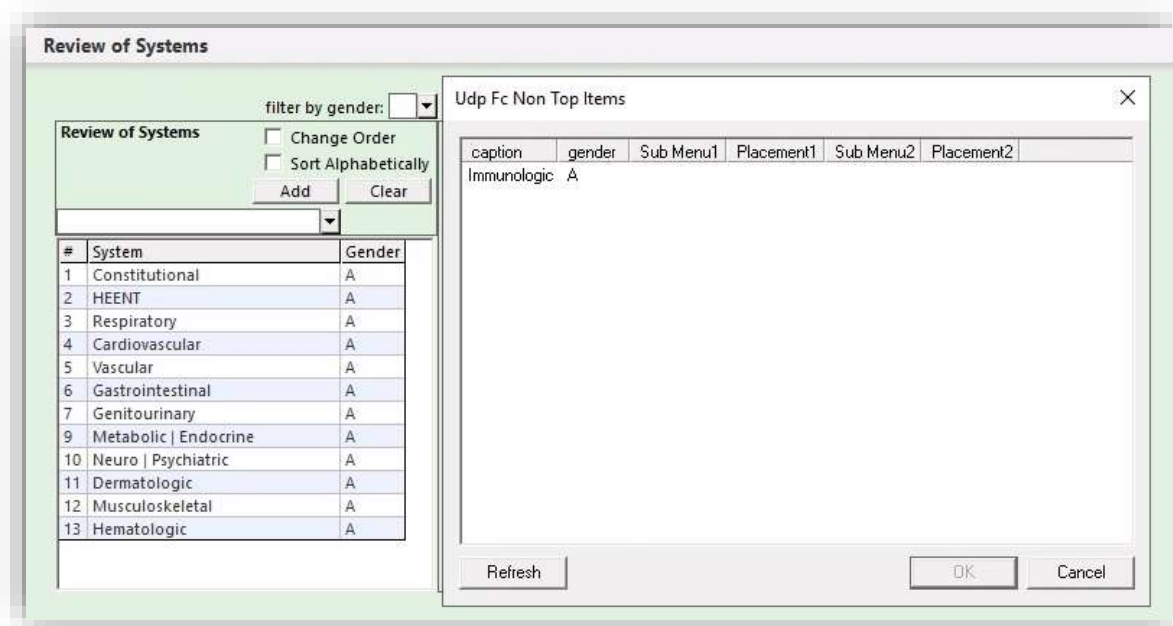
- [Constitutional](#)
- [HEENT](#)
- [Respiratory](#)
- [Cardiovascular](#)
- [Vascular](#)
- [Gastrointestinal](#)
- [Genitourinary](#)
- [Reproductive](#)



# Framework Content – Review of Systems

To add to the Top  
14 Review of  
Systems

- Select to launch the picklist
- Select the **ROS** you wish to add
- Click **OK**
- Click **Add**



**Review of Systems**

filter by gender:

Change Order  
 Sort Alphabetically

Add Clear

#	System	Gender
1	Constitutional	A
2	HEENT	A
3	Respiratory	A
4	Cardiovascular	A
5	Vascular	A
6	Gastrointestinal	A
7	Genitourinary	A
9	Metabolic   Endocrine	A
10	Neuro   Psychiatric	A
11	Dermatologic	A
12	Musculoskeletal	A
13	Hematologic	A

**Udp Fc Non Top Items**

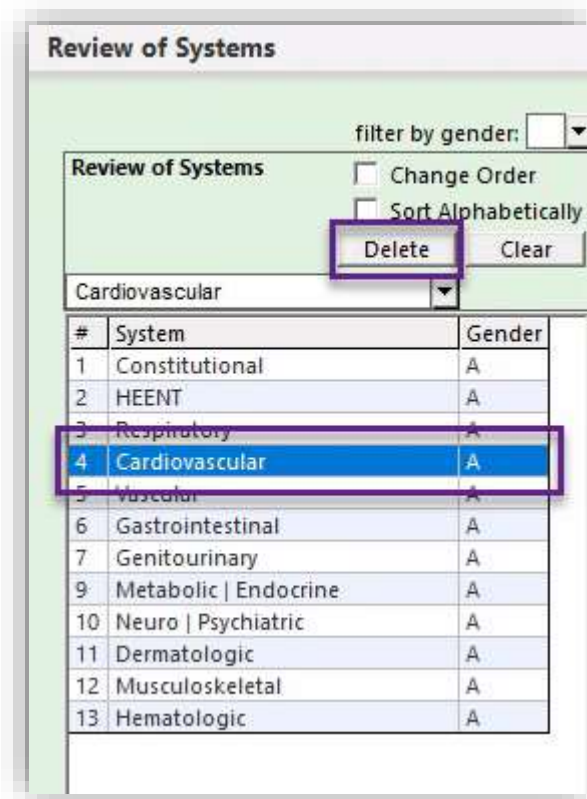
caption	gender	Sub Menu1	Placement1	Sub Menu2	Placement2
Immunologic	A				

Refresh OK Cancel

# Framework Content – Review of Systems

To **remove** a Review of Systems

- Select a **row** in the grid
- Click **Delete**



Review of Systems

filter by gender:  ▼

Review of Systems  Change Order  
 Sort Alphabetically

**Delete** Clear

Cardiovascular ▼

#	System	Gender
1	Constitutional	A
2	HEENT	A
3	Respiratory	A
<b>4</b>	<b>Cardiovascular</b>	A
5	Muscular	A
6	Gastrointestinal	A
7	Genitourinary	A
9	Metabolic   Endocrine	A
10	Neuro   Psychiatric	A
11	Dermatologic	A
12	Musculoskeletal	A
13	Hematologic	A

# Framework Content – Review of Systems

Configuring a One Page ROS template for all genders enables providers access an all-gender ROS template, regardless of a patient's birth sex.

- Click **all genders**
- In the **Caption** type "One Page – ROS"
- For the **Template** select **pc\_ros\_neutral**
- Click **Save**

**Review of Systems**

filter by gender:

**Review of Systems**  Change Order  Sort Alphabetically

#	System	Gender
1	Constitutional	A
2	HEENT	A
3	Respiratory	A
4	Cardiovascular	A
5	Vascular	A
6	Gastrointestinal	A
7	Genitourinary	A
9	Metabolic   Endocrine	A
10	Neuro   Psychiatric	A
11	Dermatologic	A
12	Musculoskeletal	A
13	Hematologic	A

**Custom Review of Systems**

all genders  gender specific

Caption:

Template:

# Framework Content – Review of Systems

Gender Neutral - ROS

Gender Neutral - ROS

Information pre-populated from a popup such as an HPI must be changed on that popup to prevent conflicting documentation.

ROS Defaults:

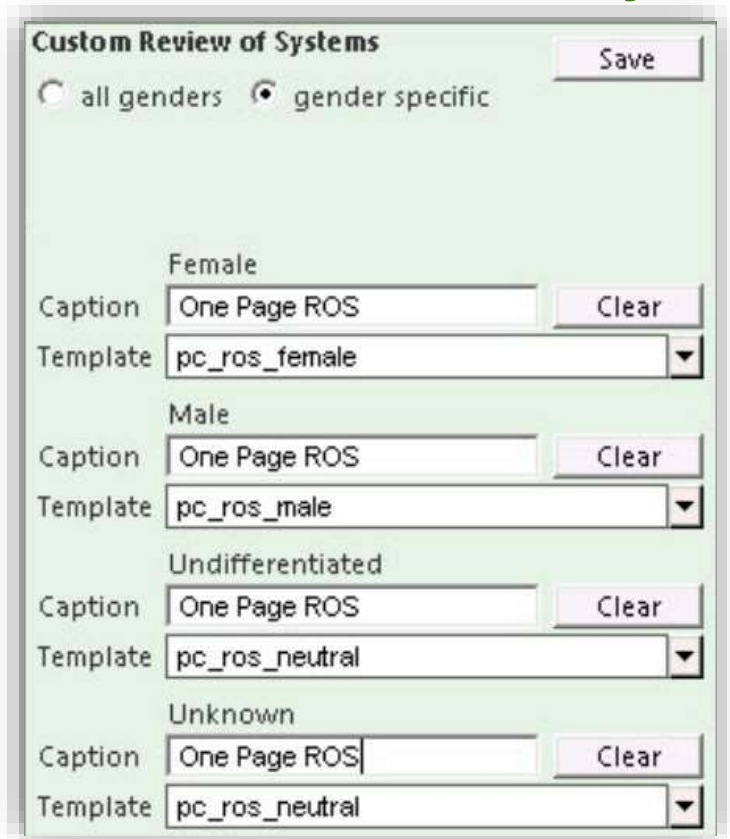
Quick:

<b>Constitutional</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Chills <input type="checkbox"/> Fatigue <input type="checkbox"/> Fever <input type="checkbox"/> Malaise <input type="checkbox"/> Night sweats <input type="checkbox"/> Weight gain <input type="checkbox"/> Weight loss <input type="checkbox"/> Other: <input type="text"/>	<b>Cardiovascular</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Chest pain <input type="checkbox"/> Claudication <input type="checkbox"/> Edema <input type="checkbox"/> Palpitations <input type="checkbox"/> Other: <input type="text"/>	<b>Reproductive</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Abnormal Pap <input type="checkbox"/> Dysmenorrhea <input type="checkbox"/> Dyspareunia <input type="checkbox"/> Erectile dysfunction <input type="checkbox"/> Hot flashes <input type="checkbox"/> Irregular menses <input type="checkbox"/> Penile discharge <input type="checkbox"/> Sexual dysfunction <input type="checkbox"/> Vaginal discharge <input type="checkbox"/> Other: <input type="text"/>	<b>Neurological</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Dizziness <input type="checkbox"/> Extremity numbness <input type="checkbox"/> Extremity weakness <input type="checkbox"/> Gait disturbance <input type="checkbox"/> Headache <input type="checkbox"/> Memory impairment <input type="checkbox"/> Seizures <input type="checkbox"/> Tremors <input type="checkbox"/> Other: <input type="text"/>	<b>Musculoskeletal</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Back pain <input type="checkbox"/> Joint pain <input type="checkbox"/> Joint swelling <input type="checkbox"/> Muscle weakness <input type="checkbox"/> Neck pain <input type="checkbox"/> Other: <input type="text"/>
<b>HEENT</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Ear drainage <input type="checkbox"/> Ear pain <input type="checkbox"/> Eye discharge <input type="checkbox"/> Eye pain <input type="checkbox"/> Hearing loss <input type="checkbox"/> Nasal drainage <input type="checkbox"/> Sinus pressure <input type="checkbox"/> Sore throat <input type="checkbox"/> Visual changes <input type="checkbox"/> Other: <input type="text"/>	<b>Gastrointestinal</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Abdominal pain <input type="checkbox"/> Blood in stools <input type="checkbox"/> Change in stools <input type="checkbox"/> Constipation <input type="checkbox"/> Diarrhea <input type="checkbox"/> Heartburn <input type="checkbox"/> Loss of appetite <input type="checkbox"/> Nausea <input type="checkbox"/> Vomiting <input type="checkbox"/> Other: <input type="text"/>	<b>Integumentary</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Breast discharge <input type="checkbox"/> Breast lump <input type="checkbox"/> Brittle hair <input type="checkbox"/> Brittle nails <input type="checkbox"/> Hair loss <input type="checkbox"/> Hirsutism <input type="checkbox"/> Hives <input type="checkbox"/> Pruritus <input type="checkbox"/> Moie changes <input type="checkbox"/> Rash <input type="checkbox"/> Skin lesion <input type="checkbox"/> Other: <input type="text"/>	<b>Psychiatric</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Anxiety <input type="checkbox"/> Depression <input type="checkbox"/> Insomnia <input type="checkbox"/> Other: <input type="text"/>	<b>Hematologic / Lymphatic</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Easy bleeding <input type="checkbox"/> Easy bruising <input type="checkbox"/> Lymphadenopathy <input type="checkbox"/> Other: <input type="text"/>
<b>Respiratory</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Chronic cough <input type="checkbox"/> Cough <input type="checkbox"/> Known TB exposure <input type="checkbox"/> Shortness of breath <input type="checkbox"/> Wheezing <input type="checkbox"/> Other: <input type="text"/>	<b>Genitourinary</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Dysuria <input type="checkbox"/> Drizzling <input type="checkbox"/> Hematuria <input type="checkbox"/> Polyuria (Genitourinary) <input type="checkbox"/> Slow stream <input type="checkbox"/> Urinary frequency <input type="checkbox"/> Urinary incontinence <input type="checkbox"/> Urinary retention <input type="checkbox"/> Other: <input type="text"/>	<b>Metabolic / Endocrine</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Cold intolerance <input type="checkbox"/> Heat intolerance <input type="checkbox"/> Polydipsia <input type="checkbox"/> Polyphagia <input type="checkbox"/> Other: <input type="text"/>	<b>Immunologic</b> <input type="checkbox"/> All neg <b>Neg Pos</b> <input type="checkbox"/> Contact allergy <input type="checkbox"/> Environmental allergies <input type="checkbox"/> Food allergies <input type="checkbox"/> Seasonal allergies <input type="checkbox"/> Other: <input type="text"/>	<input type="checkbox"/> All other negative <input type="button" value="Save &amp; Close"/> <input type="button" value="Cancel"/>

# Framework Content – Review of Systems

To configure a gender specific

- Click **gender specific**
- Fill in the options as seen in the screen shot
- Click **Save**



**Custom Review of Systems** Save

all genders  gender specific

Female  
Caption:  Clear  
Template:  ▼

Male  
Caption:  Clear  
Template:  ▼

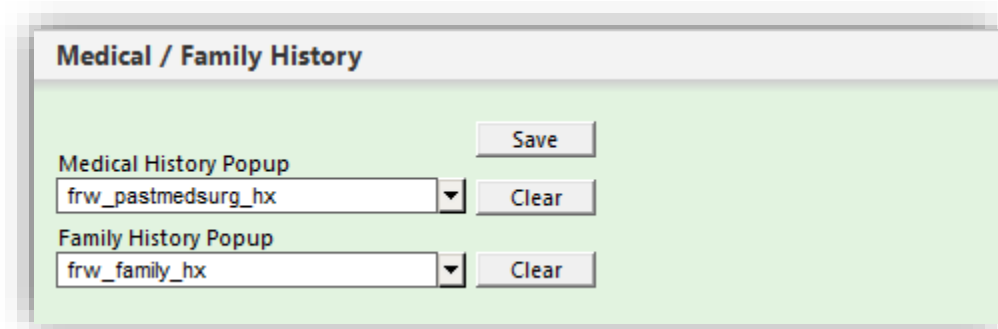
Undifferentiated  
Caption:  Clear  
Template:  ▼

Unknown  
Caption:  Clear  
Template:  ▼

# Framework Content – Medical/Family History

To update a Specialty, Practice, or Providers Medical/Family History:

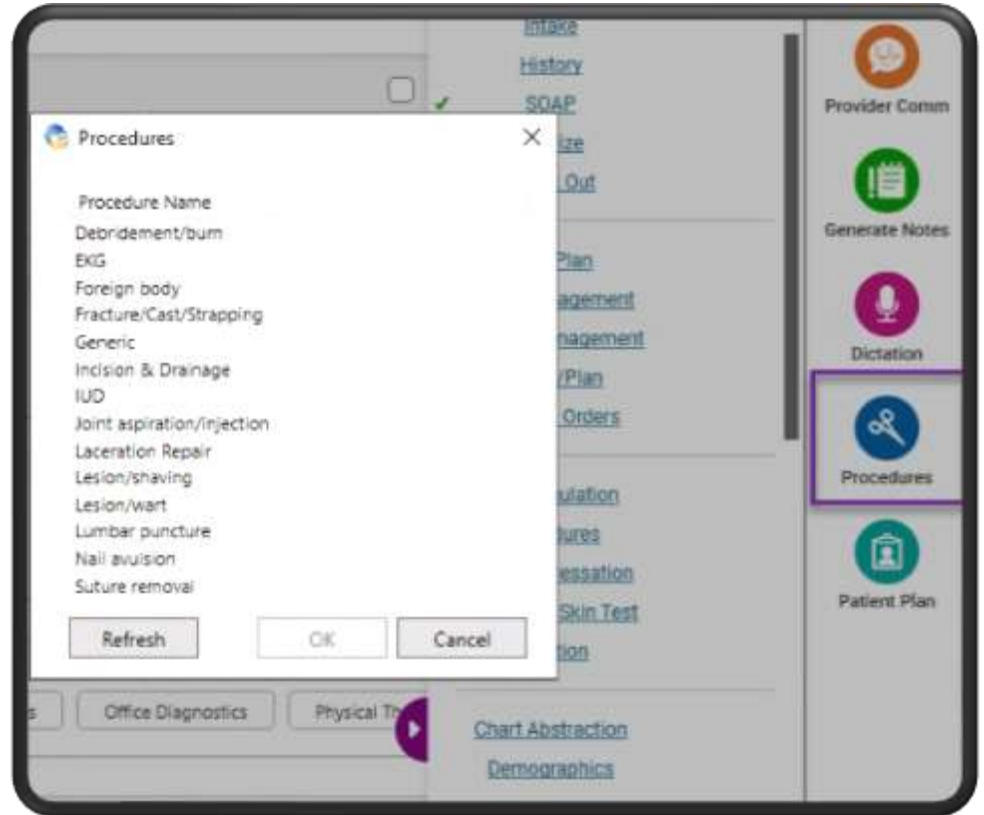
- Click in the **Medical History Popup** or **Family History Popup**
- Select the **template** you want to launch
- Click **Save**



The screenshot shows a web form titled "Medical / Family History". It contains two rows of input fields. The first row is for "Medical History Popup" with a dropdown menu showing "frw\_pastmedsurg\_hx" and a "Clear" button. The second row is for "Family History Popup" with a dropdown menu showing "frw\_family\_hx" and a "Clear" button. A "Save" button is located at the top right of the form area.

# Framework Content - Procedures

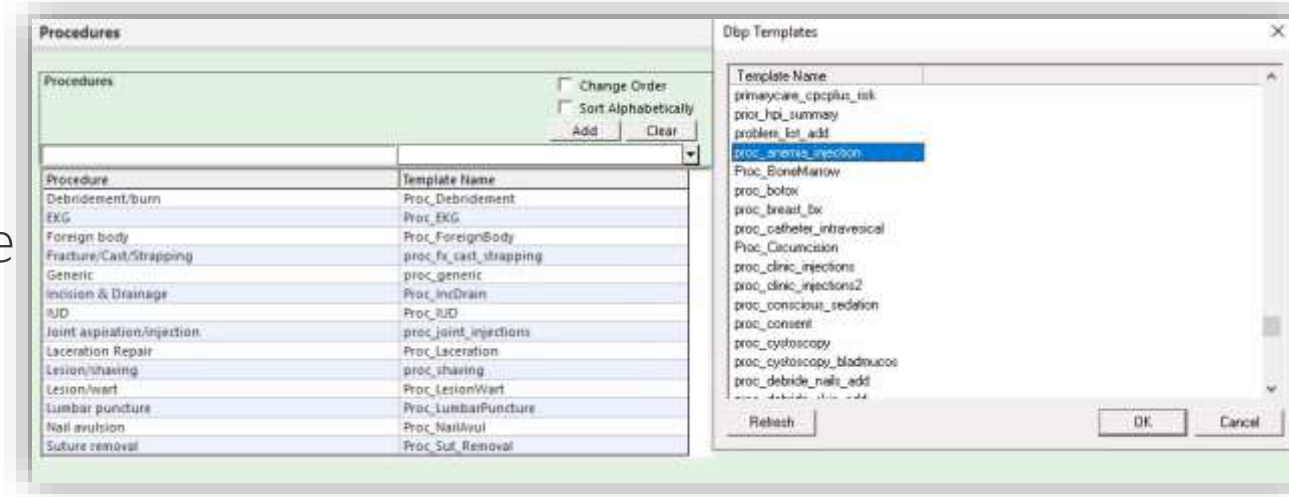
The **Procedures Panel** on the Framework Content template allows you to configure the list that is launched from the Procedures button on the **SOAP** template.



# Framework Content - Procedures

To add a Procedure:

- Use the picklist to select a procedure template to add
- Type the name of the procedure (40-character limit)
- Click Add
- Select Sort Alphabetically to rearrange the items in the Procedures list.







# Framework Content – Medical Chart Summary

You can configure the left pane of the Medical Chart Summary panel that is on the Home Page and Summary template.

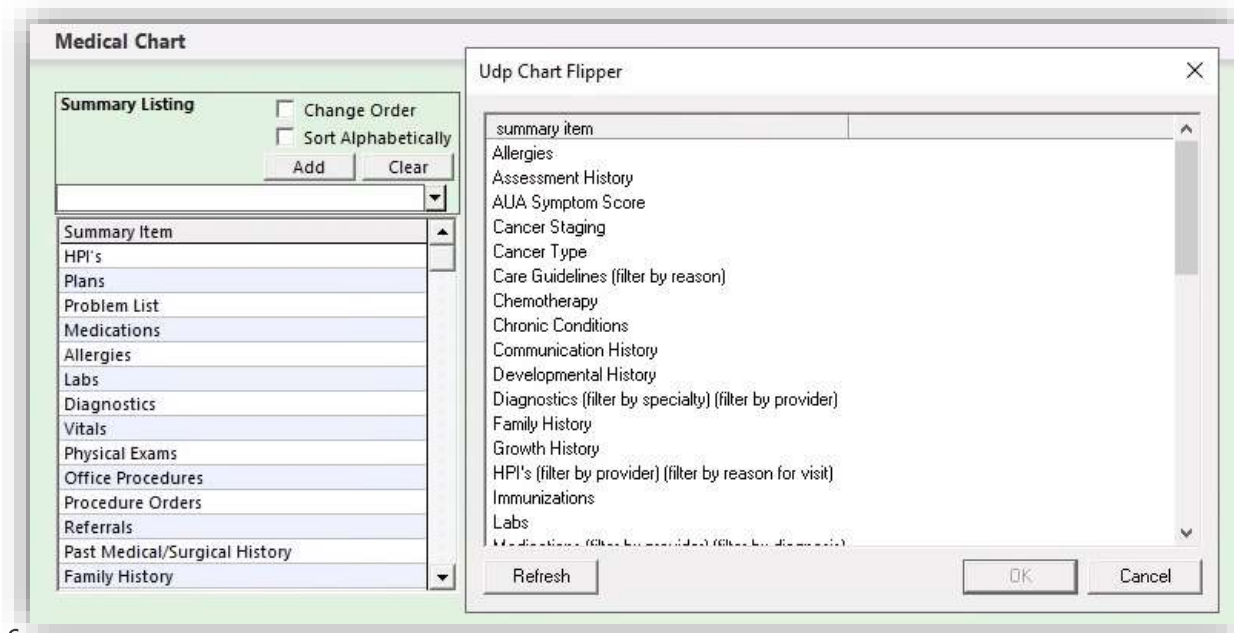
The screenshot shows a 'Medical Chart' window with a table of assessment data and a sidebar on the left. The table has columns for Encounter Date, Performed Date, Instrument, Score, Severity, Classification, and Complete. The sidebar lists various medical categories, with 'Screening Tools' highlighted in blue.

	Encounter Date	Performed Date	Instrument	Score	Severity	Classification	Complete
Plans	07/23/2020	07/23/2020	Columbia Suicidal Severity Rating Scale (C-SSRS)	2	Moderate Risk		Yvette Big
Problem List							
Medications	07/13/2020	07/15/2020	BAND 36 - Item Health Survey	N/A	N/A		Yvette Big
Allergies							
Labs	07/15/2020	07/15/2020	Columbia Suicidal Severity Rating Scale (C-SSRS)	1	Low Risk		Yvette Big
Diagnosis							
Vitals	04/02/2020	04/02/2020	Property Risk Assessment		High risk		Yvette Big
Physical Exams	04/02/2020	04/02/2020	Homicide Risk Assessment		High risk		Yvette Big
Office Procedures	04/02/2020	04/02/2020	Suicide Risk Assessment		High risk		Yvette Big
Procedure Orders	07/10/2017	07/10/2017	Patient Health Questionnaire (PHQ-2)	0			Yvette Big
Referrals	07/10/2017	07/10/2017	Geriatric Depression Scale (GDS)	4	No depression		Yvette Big
Past Medical/Surgical History							
Family History	07/10/2017	07/10/2017	Patient Health Questionnaire (PHQ-9)	10	Moderate depression		Yvette Big
Tobacco/Alcohol Usage							
Office Labs	07/10/2017	07/10/2017	Saint Louis University Mental Status Exam (SLUMS)	8	Dementia		Yvette Big
Immunizations							
Care Guidelines							
Assessment History							
Screening Tools							
Developmental History							
Communication History							
Patient Providers							
IMMUNE System							

# Framework Content – Medical Chart Summary

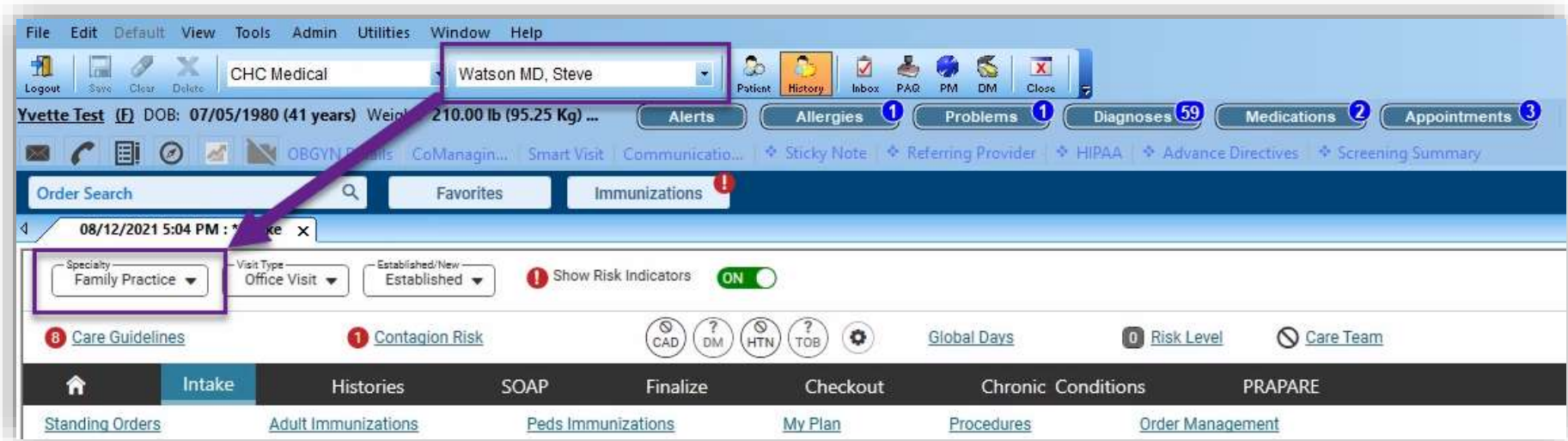
To add items to the Medical Chart Summary

- Click to launch the picklist and select the item you want to add
- Click OK
- Click Add
- Select Sort Alphabetically to rearrange the items in the Summary Listing. The order can be rearranged just like the Reason for Visit section if you choose.



# Default Visit Specialty Configuration

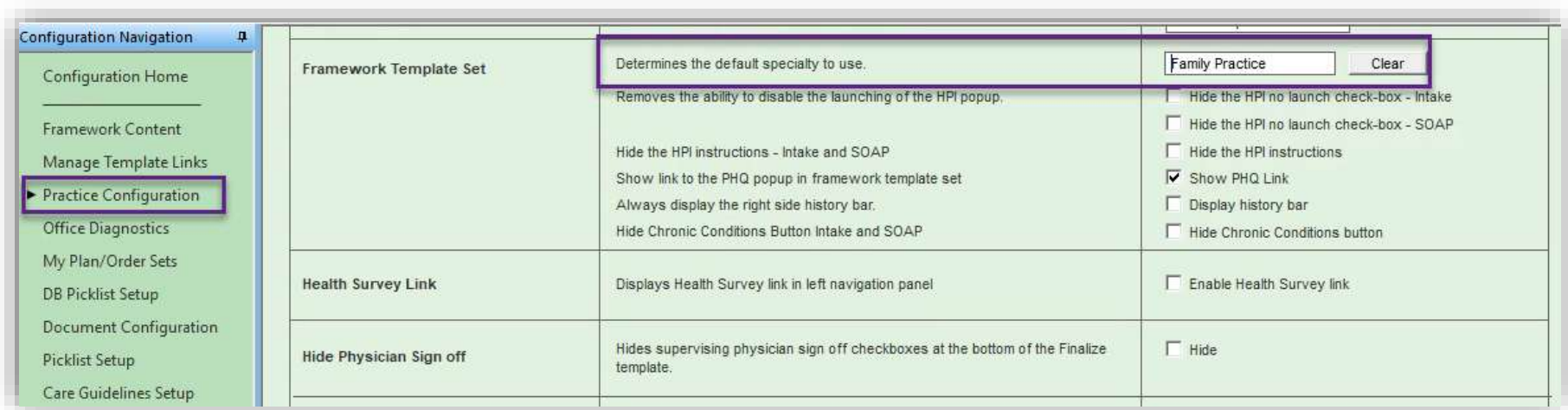
In the Default Visit Specialty Configuration, you can set what specialty displays for your Rendering Providers that have been set up in File Maintenance.



The screenshot displays the eMedApps software interface. At the top, there is a menu bar with options: File, Edit, Default, View, Tools, Admin, Utilities, Window, Help. Below the menu bar, there are several toolbars and buttons. The top toolbar includes Logout, Save, Clear, Delete, and a dropdown menu for 'CHC Medical'. The second toolbar includes Patient, History, Inbox, PAQ, PM, DM, and Close. The third toolbar includes Alerts, Allergies (1), Problems (1), Diagnoses (59), Medications (2), and Appointments (3). The fourth toolbar includes OBGYN, CoManagin..., Smart Visit, Communicatio..., Sticky Note, Referring Provider, HIPAA, Advance Directives, and Screening Summary. The fifth toolbar includes Order Search, Favorites, and Immunizations (1). The sixth toolbar includes a date and time selector (08/12/2021 5:04 PM) and a close button. The main area shows a 'Specialty' dropdown menu set to 'Family Practice', a 'Visit Type' dropdown menu set to 'Office Visit', and an 'Established/New' dropdown menu set to 'Established'. There is also a 'Show Risk Indicators' toggle switch set to 'ON'. The bottom navigation bar includes options: Intake, Histories, SOAP, Finalize, Checkout, Chronic Conditions, and PRAPARE. Below the navigation bar, there are links for Standing Orders, Adult Immunizations, Peds Immunizations, My Plan, Procedures, and Order Management.

# Default Visit Specialty Configuration

If you are part of a single specialty practice you will set up your default specialty in Practice Configuration. You do not need to assign each provider to a specialty.



The screenshot displays the 'Practice Configuration' interface. On the left is a 'Configuration Navigation' sidebar with the following items: Configuration Home, Framework Content, Manage Template Links, Practice Configuration (highlighted with a red box), Office Diagnostics, My Plan/Order Sets, DB Picklist Setup, Document Configuration, Picklist Setup, and Care Guidelines Setup. The main content area is a table with three rows:

<b>Framework Template Set</b>	<p>Determines the default specialty to use.</p> <p>Removes the ability to disable the launching of the HPI popup.</p> <p>Hide the HPI instructions - Intake and SOAP</p> <p>Show link to the PHQ popup in framework template set</p> <p>Always display the right side history bar.</p> <p>Hide Chronic Conditions Button Intake and SOAP</p>	<p>Family Practice <input type="button" value="Clear"/></p> <p><input type="checkbox"/> Hide the HPI no launch check-box - Intake</p> <p><input type="checkbox"/> Hide the HPI no launch check-box - SOAP</p> <p><input type="checkbox"/> Hide the HPI instructions</p> <p><input checked="" type="checkbox"/> Show PHQ Link</p> <p><input type="checkbox"/> Display history bar</p> <p><input type="checkbox"/> Hide Chronic Conditions button</p>
<b>Health Survey Link</b>	<p>Displays Health Survey link in left navigation panel</p>	<p><input type="checkbox"/> Enable Health Survey link</p>
<b>Hide Physician Sign off</b>	<p>Hides supervising physician sign off checkboxes at the bottom of the Finalize template.</p>	<p><input type="checkbox"/> Hide</p>



# Default Visit Specialty Configuration

Default Visit Specialty Configuration is available on these templates

Intake

Home Page

Home Page – Allergy

Soap – Allergy

Anticoagulation Dosing

BH CA Presenting Concerns

BH – Psychiatric Evaluation

Intake – Cardiology

Care Coordination Home

Exam – Dermatology

SOAP – Dermatology

Home Page – Obstetrics

Home Page – Physical Therapy

Onc Treatment Summary

SOAP

AB Intake

Intake – Allergy

Testing – Allergy

Home Page – Behavioral Health

BH – Individual Counseling/Psych Prog Note

Home Page – Cardiology

Soap – Cardiology

Intake – Dermatology

Home Page – Dermatology

Home Page – Ambulatory Surgery

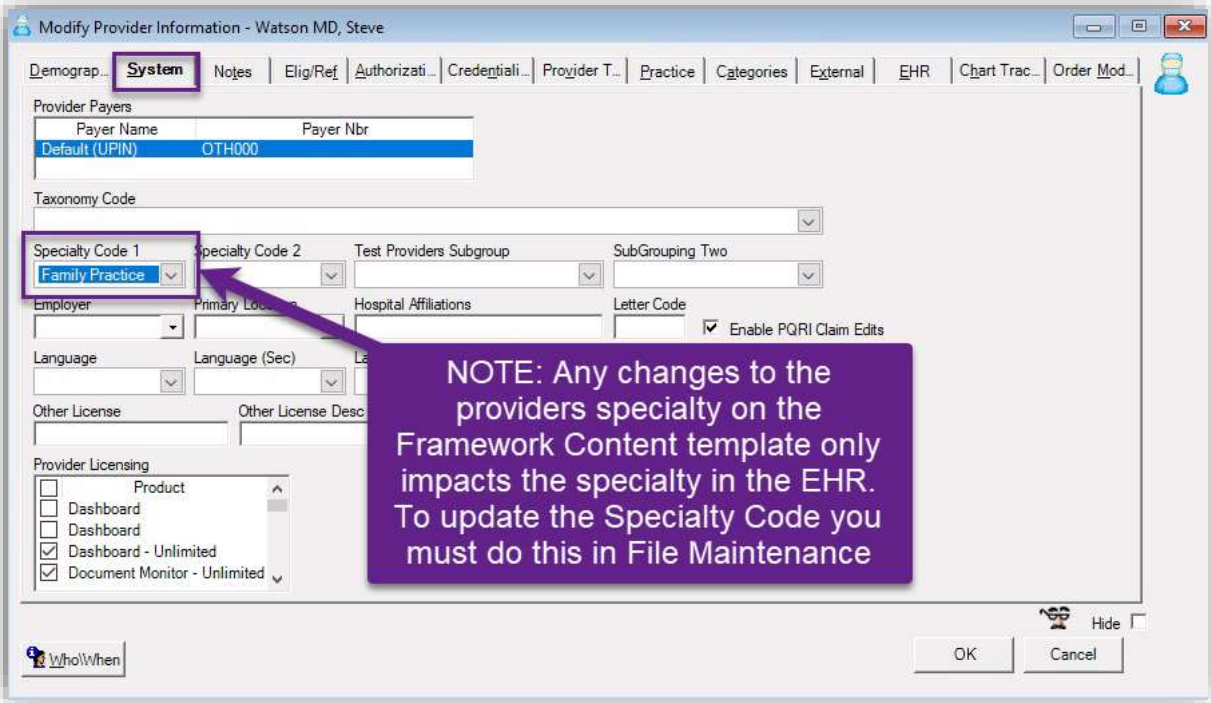
Provider Test Action

Telephone Call

Pediatric SOAP

# Default Visit Specialty Configuration

Each Rendering Provider that has been set up in File Maintenance displays in the Default Visit Specialty grid. The specialty (Specialty Code 1) mapped to the rendering provider in File Maintenance is the default specialty for the provider on the system level. The mapped specialty appears in the Default Visit Specialty grid.



Modify Provider Information - Watson MD, Steve

Demograp... **System** Notes Elig/Ref Authorizati... Credentiali... Provider T... Practice Categories External EHR Chart Trac... Order Mod...

Payer Name	Payer Nbr
Default (UPIN)	OTH000

Taxonomy Code

Specialty Code 1: Family Practice Specialty Code 2: Test Providers Subgroup: SubGrouping Two: Letter Code:  Enable PQRI Claim Edits

Other License:  Dashboard  Dashboard  Dashboard - Unlimited  Document Monitor - Unlimited

WhoWhen

OK Cancel

**NOTE: Any changes to the providers specialty on the Framework Content template only impacts the specialty in the EHR. To update the Specialty Code you must do this in File Maintenance**

# Default Visit Specialty Configuration

Configure the Default Visit Specialty Mapping for Providers:

- Select a **row** in the grid
- Click **Practice** field to select or update a practice
- Click **Location** field to select a location
- Click **Default Visit Specialty** field to select a specialty
- Select **Update**

**Default Visit Specialty**

Provider Specialty ⓘ

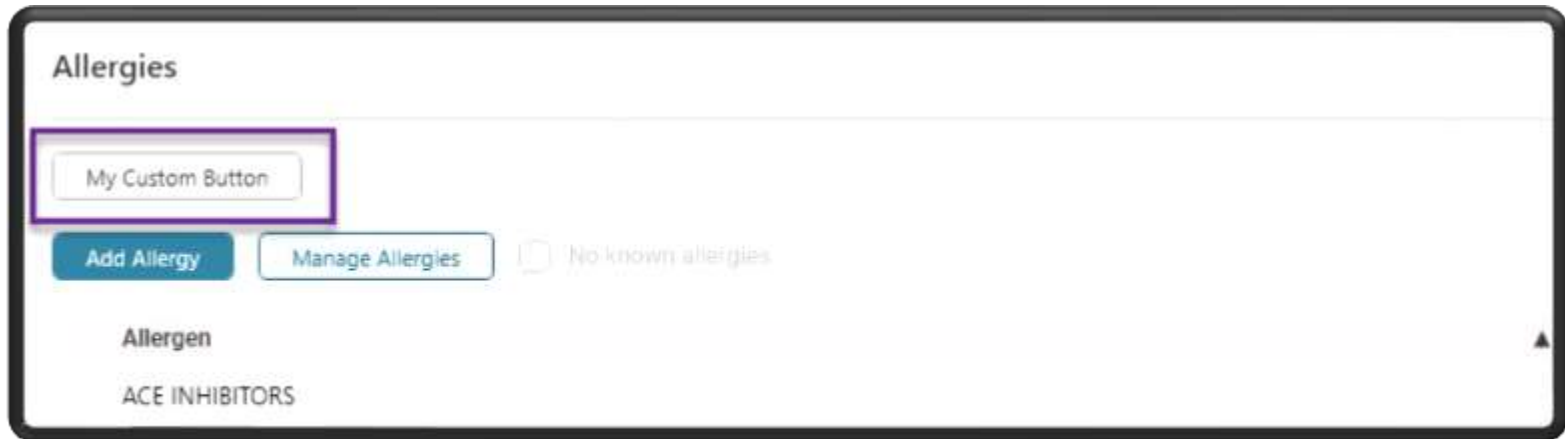
filter by provider:

filter by practice:

Provider	Practice	Location	Default Visit Specialty
Watson MD, Steve	All	All	Family Practice
Philpps DDS, Floyd	All	All	
Richards MSH, Tina	All	All	
Smith MD, John	All	All	
Smith NP, Susan	All	All	
Test MD, CareBridge	All	All	Internal Medicine
Test, Test	All	All	Family Practice
Thompson MD, Mark	All	All	
Warren MD, David	All	All	
Watson MD, Steve	All	All	Family Practice
Welby, Marcus	All	All	

# Framework Content – Client Button Configuration

- The **Client Button Configuration** contains default and client buttons for the NEW Intake, SOAP, and Pediatric SOAP template.
- Based on configuration the buttons are displayed in the corresponding section of the template for the selected specialty.







# Framework Content – Client Button Configuration

To Add a Client Button Configuration

- Click to select a **template name** (Intake, SOAP, or Pediatric SOAP)
- Click to select a **Card** (panel)
- From the grid select one of the **Client Buttons**
- Update the Button **Caption**
- Select a **template** that you want to launch
- Add the **sort order**
- Uncheck **Hide**
- Click **Update**

**Client Button Configuration**

Button configuration:

Template:  Card Name:  Button Caption \*:  Template to launch \*:  Sort Order \*:   Hide

Template	Card Name	Button Caption	Template To Launch	Sort Order	Hide
*Intake	Allergies	My Custom Button	order_management	1	No
*Intake	Allergies	Client Button 2		2	Yes
*Intake	Allergies	Client Button 3		3	Yes

# Client Checkbox Configuration

In **Spring 2021** you can configure up to 3 client configurable check boxes for each section of the **new Intake, SOAP, and Pediatric SOAP** templates. You can also add a label in CheckBox Caption and add a text in Document Text for each of the check boxes. The order of the check boxes can be changed, and the check boxes can be hidden or shown based on selection.

## Client CheckBox Configuration

### CheckBox configuration:

Template:	Card Name:	CheckBox Caption *:	Document Text *:	Sort Order *:	<input type="checkbox"/> Hide	<input type="button" value="Clear"/>	<input type="button" value="Update"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			

Template Name	Card Name	CheckBox Caption	Document Text	Sort Order	Hide	
*Intake	Allergies	CheckBox 1		1	Y	
*Intake	Allergies	CheckBox 2		2	Y	
*Intake	Allergies	CheckBox 3		3	Y	
*Intake	Assessment Plan	CheckBox 1		1	Y	
*Intake	Assessment Plan	CheckBox 2		2	Y	
*Intake	Assessment Plan	CheckBox 3		3	Y	

# Client Checkbox Configuration

To add a Client Checkbox Configuration:

- From the **grid** select a row for a template name and a card name to configure.
- In the **CheckBox Caption** field, enter the label for the check box
- In the **Document Text** field, enter the custom phrase to display when checked on generated documents
- Uncheck **Hide**
- Click **Update**

## Client CheckBox Configuration

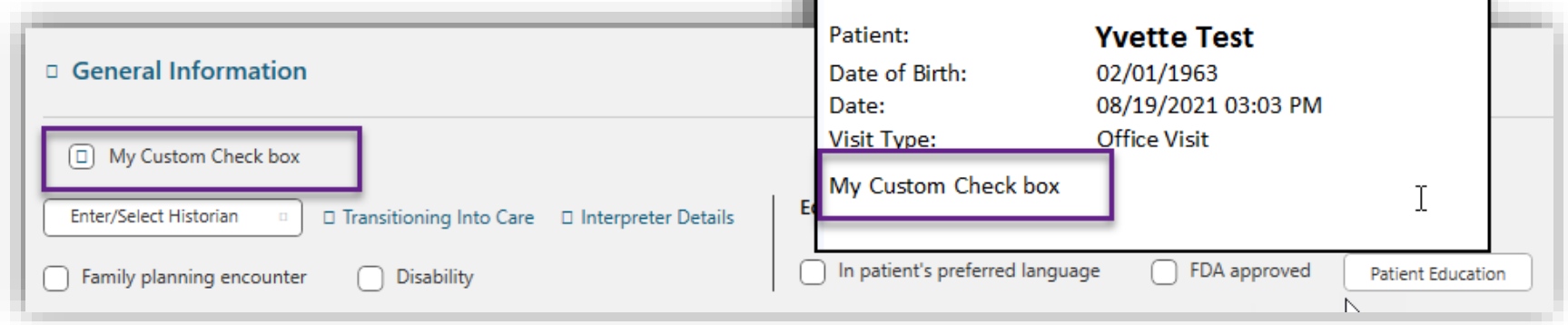
CheckBox configuration:

Template:	Card Name:	CheckBox Caption *:	Document Text *:	Sort Order *:	<input type="button" value="Clear"/> <input type="button" value="Update"/>
<input type="text" value="*Intake"/>	<input type="text" value="General Information"/>	<input type="text" value="My Custom Check box"/>	<input type="text" value="My Custom Check box"/>	<input type="text" value="1"/> <input type="checkbox"/> Hide	

Template Name	Card Name	CheckBox Caption	Document Text	Sort Order	Hide
*Intake	Assessment Plan	CheckBox 3		3	Y
*Intake	General Information	CheckBox 1		1	Y
*Intake	General Information	CheckBox 2		2	Y
*Intake	General Information	CheckBox 3		3	Y
*Intake	History Summary	CheckBox 1		1	Y
*Intake	History Summary	CheckBox 2		2	Y

# Client Checkbox Configuration

You can see “My Custom Check Box” both on the Intake template General Card and on the generated document.



The image displays two screenshots from the NextGen Healthcare system. The left screenshot shows the 'General Information' section of an intake template. A purple box highlights the checkbox labeled 'My Custom Check box'. Other options include 'Enter/Select Historian', 'Transitioning Into Care', 'Interpreter Details', 'Family planning encounter', and 'Disability'. The right screenshot shows a generated document for patient Yvette Test. A purple box highlights the 'My Custom Check box' label on the document. The document also includes fields for Patient, Date of Birth, Date, and Visit Type, and checkboxes for 'In patient's preferred language', 'FDA approved', and 'Patient Education'.

**General Information**

- My Custom Check box
- Enter/Select Historian
- Transitioning Into Care
- Interpreter Details
- Family planning encounter
- Disability

**nextgen healthcare**

Patient: **Yvette Test**  
Date of Birth: 02/01/1963  
Date: 08/19/2021 03:03 PM  
Visit Type: Office Visit

My Custom Check box

In patient's preferred language  FDA approved

# Client Checkbox Configuration

To remove a Client CheckBox Configuration:

- **Select** the check box you wish to remove in the **grid**
- Check **Hide**
- Click **Update**

**Client CheckBox Configuration**

CheckBox configuration:

Template:  Card Name:  CheckBox Caption \*:  Document Text \*:  Sort Order \*:   Hide

Template Name	Card Name	CheckBox Caption	Document Text	Sort Order	Hide
*Intake	General Information	My Custom Check box	My Custom Check box	1	N
*Intake	General Information	CheckBox 2		2	Y
*Intake	General Information	CheckBox 3		3	Y



# Assessment / Plan Navigation Configuration

From the Assessment/Plan Configuration panel, you can:

- Create Assessment/Plan Navigation based on Specialty
- Modify cations, template, and sequence of tabs
- Remove tabs not required for your specialty, practice, and provider
- Switch between a customized tab to a core tab
- Only available in Spring 2021

**Add or Update Assessment**

Assessments | My Plan | A/P Details | Labs | Diagnostics | Referrals | Office Procedures | Cosign Orders

Today's Concerns/Reason For Visit Medications | Immunizations

Follow-up back pain

(Select a row from any grid to add to today's  Add assessments on 1-click

**Billing Diagnosis History**  Show chronic only

Diagnosis Description	Code
Adhesive middle ear disease, unspecified ear	H74.19
AthscI autologous vein CABG w ang pctrs w documented spasm	I25.711
Body mass index (BMI) 20.0-20.9, adult	Z68.20
Cyclothymic disorder	F34.0
Diabetes due to underlying condition w diabetic amyotrophy	E08.44
Diabetes in childbirth	O24.92

**Clinical Problems**  Show chronic  Show my tracked problems  No active problems

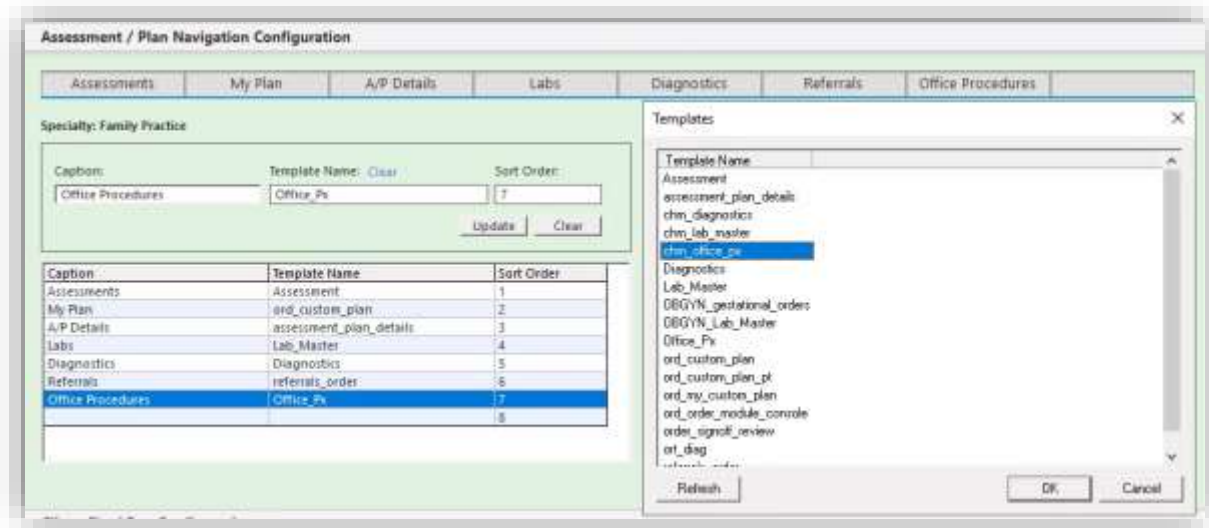
Onset Date	Description
08/06/2020	Hypertension

**My Favorites** Favorites category: All Filter

# Assessment / Plan Navigation Configuration

To update Assessment/Plan Navigation to a custom template:

- Click on the **row** that the template needs to be updated on
- Click in the **Template Name** field
- **Select** your new template
- Click **Update**



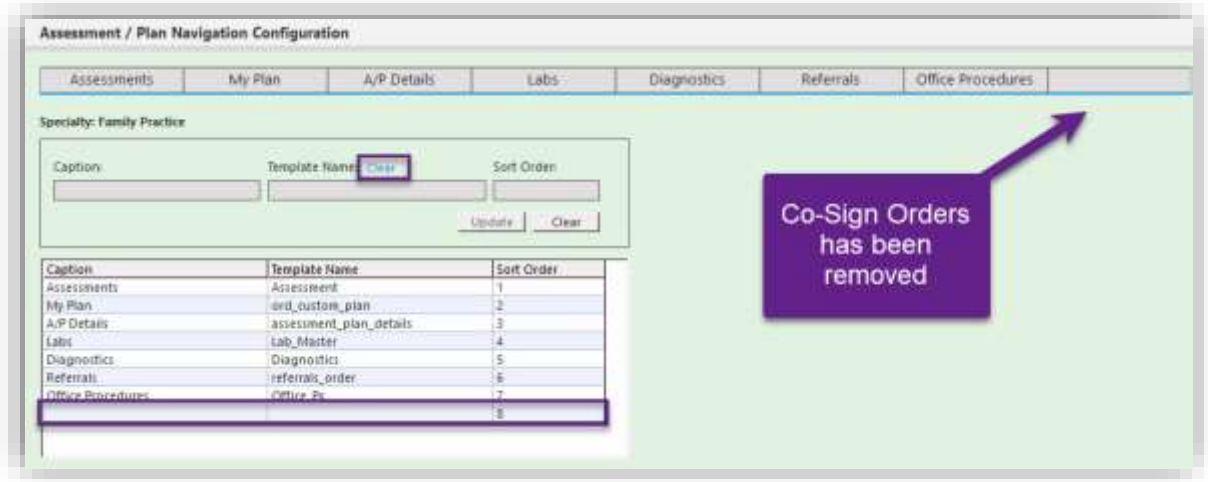
\*If you have one universal custom template that every specialty, practice, and provider need to use. Updating template links in template editor should be used.

\*\* Use this if you have different workflows for different specialty, practice, and/or provider.

# Assessment / Plan Navigation Configuration

To remove  
Assessment/Plan  
Navigation:

- Select the section to be removed in the **grid**
- Remove the **Caption**
- Remove the **Template Name** by clicking **clear**
- Click **Update**



Assessment / Plan Navigation Configuration

Assessments My Plan A/P Details Labs Diagnostics Referrals Office Procedures

Specialty: Family Practice

Caption: Template Name:  Sort Order:

Caption	Template Name	Sort Order
Assessments	Assessment	1
My Plan	ord_custom_plan	2
A/P Details	assessment_plan_details	3
Labs	Lab_Master	4
Diagnostics	Diagnostics	5
Referrals	referrals_order	6
Office Procedures	Office Pr	7
		8

Co-Sign Orders has been removed



# Assessment / Plan Navigation Configuration

To change the order of the Assessment/Plan Navigation:

- Select the **row** of the template you want to move
- Click in **Sort Order** and select the sort order
- Click **Update**

The screenshot shows the 'Assessment / Plan Navigation Configuration' window. At the top, there are tabs for 'Assessments', 'My Plan', 'A/P Details', 'Labs', 'Diagnostics', 'Referrals', and 'Office Procedures'. Below the tabs, the 'Specialty' is set to 'Family Practice'. A form area contains fields for 'Caption' (Office Procedures), 'Template Name' (Office\_Pk), and 'Sort Order' (2). There are 'Update' and 'Clear' buttons. A 'Sort Order' dropdown menu is open, showing a list of numbers from 1 to 8. A purple callout box with an arrow points to the dropdown, containing the text 'After sort is updated'. Below the form, there are two tables. The first table shows the current configuration, and the second table shows the updated configuration after the sort order change.

Caption	Template Name	Sort Order
Assessment	Assessment	1
My Plan	ord_custom_plan	2
A/P Details	assessment_plan_details	3
Labs	Lab_Master	4
Diagnostics	Diagnostics	5
Referrals	referrals_order	6
Office Procedures	Office_Pk	7
		8

Caption	Template Name	Sort Order
Assessments	Assessment	1
Office Procedures	Office_Pk	2
My Plan	ord_custom_plan	3
A/P Details	assessment_plan_details	4
Labt	Lab_Master	5
Diagnostics	Diagnostics	6
Referrals	referrals_order	7
		8

In the screen shot I moved Office Procedure from spot 7 to spot 2



# Assessment / Plan Navigation Configuration

### Assessment / Plan Navigation Configuration

Assessments	Office Procedures	My Plan	A/P Details	Labs	Diagnostics	Referrals	
-------------	-------------------	---------	-------------	------	-------------	-----------	--

Specialty: Family Practice

Caption:  Template Name:  Clear Sort Order:

Caption	Template Name	Sort Order
Assessments	Assessment	1
Office Procedures	Office_Px	2
My Plan	ord_custom_plan	3
A/P Details	assessment_plan_details	4
Labs	Lab_Master	5
Diagnostics	Diagnostics	6
Referrals	referrals_order	7
		8



# Assessment / Plan Navigation Configuration

Specialty:  Practice:   Provider:

### Assessment / Plan Navigation Configuration

Assessments | Office Procedures | My Plan | A/P Details | Labs | Diagnostics | Referrals

**Specialty: Family Practice**

Practice: **The Community Health Clinic**

Form fields for Specialty: Family Practice:

Caption:  Template Name:  Clear Sort Order:

Caption	Template Name	Sort Order
Assessments	Assessment	1
Office Procedures	Office_Px	2
My Plan	ord_custom_plan	3
A/P Details	assessment_plan_details	4
Labs	Lab_Master	5
Diagnostics	Diagnostics	6
Referrals	referrals_order	7
		8

Form fields for Practice: The Community Health Clinic:

Caption:  Template Name:  Clear Sort Order:

Caption	Template Name	Sort Order
Assessments	Assessment	1
Office Procedures	Office_Px	2
My Plan	ord_custom_plan	3
A/P Details	assessment_plan_details	4
Labs	Lab_Master	5
Diagnostics	Diagnostics	6
Referrals	referrals_order	7
		8



# Assessment / Plan Navigation Configuration

Specialty: Family Practice Practice: The Community Health Clinic Provider: Floyd Philpps DDS Clear

### Assessment / Plan Navigation Configuration

Assessments Office Procedures My Plan A/P Details Labs Diagnostics Referrals

Specialty: Family Practice, Practice: The Community Health Clinic Provider: Floyd Philpps DDS

Form 1:

Caption:  Template Name:  Clear Sort Order:

Caption	Template Name	Sort Order
Assessments	Assessment	1
Office Procedures	Office_Px	2
My Plan	ord_custom_plan	3
A/P Details	assessment_plan_details	4
Labs	Lab_Master	5
Diagnostics	Diagnostics	6
Referrals	referrals_order	7
		8

Form 2:

Caption:  Template Name:  Clear Sort Order:

Caption	Template Name	Sort Order

Navigation:

# Q&A