

Kareo Clinical Template Editor Guide

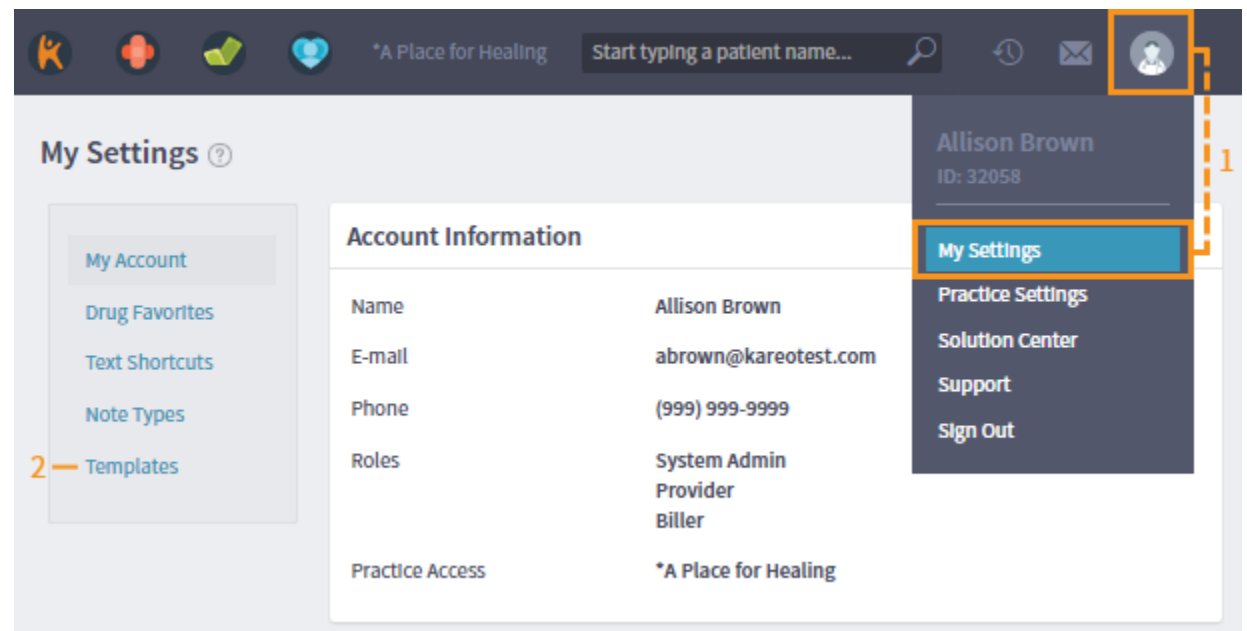
Navigate the Template Editor

Templates are used to streamline physician documentation. Kareo Clinical provides over 200 library templates that can easily be modified, renamed it and saved as your own. Templates you create can be selected when creating a note. You can also share custom templates with other providers or clinical assistants within the practice.

Note: Templates cannot currently be deleted, only inactivated (meaning they will not show up in the list when using templates).

▶ To access the Template Editor

1. Open Kareo Clinical, click the **User icon** in the top right of the window, and select **My Settings**
2. Click **Templates** on the left menu. The *Templates* page opens to *Active* templates.



- Click to view a list of all *Active* or *Inactive* templates.
- Click **Set Specialty Filter** to use a set of templates specifically for a specialty you select. Templates that do not apply to your specialty are moved to the *Inactive* list.
- Click *Create Template* to build a custom template.
- Click the check box on the left of a custom template and click **Share** to make the template accessible to other providers and clinical assistants in the practice. (See Share Custom Templates section.)
- Click the check box on the left of a template name and click **Deactivate** to make the template inactive. Deactivated templates display in the *Inactive* list. (See “Inactivate or Reactivate a Template” section.)
- Click the *Template Name*, *Specialty*, *Last Update*, or *Type* gray column header to sort the template list.
- The *Type* column indicates whether a template is built-in (System) or custom.
- Click a **Template Name** to view or edit details.

Templates

My Settings

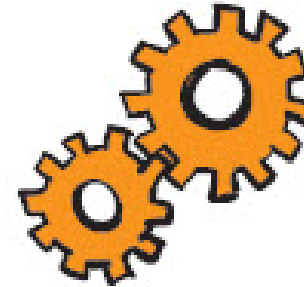
Active Inactive Set Specialty Filter Create Template

Share Deactivate

	TEMPLATE NAME	SPECIALTY	LAST UPDATE	TYPE
<input type="checkbox"/>	Abdominal Pain, Adult	Family Practice	10/21/15 03:06:19 PM	System
<input type="checkbox"/>	Acne	General Practice	10/21/15 03:06:24 PM	System
<input type="checkbox"/>	ADHD	Family Practice	10/21/15 03:06:24 PM	System
<input type="checkbox"/>	ADHD, Child	Family Practice	10/21/15 03:06:28 PM	System
<input type="checkbox"/>	Adjustment Disorders	Psychiatry	10/21/15 03:06:17 PM	System
<input type="checkbox"/>	Anemia, Iron Deficiency	Family Practice	10/21/15 03:06:23 PM	System
<input type="checkbox"/>	Antepartum Gest. Age 18-20 EDD (ACOG)	Obstetrics Gynecology	10/21/15 03:06:34 PM	System
<input type="checkbox"/>	Antepartum Gest. Age Confirm EDD (ACOG)	Obstetrics Gynecology	10/21/15 03:06:34 PM	System
<input type="checkbox"/>	Antepartum Initial (ACOG)	Obstetrics Gynecology	10/21/15 03:06:23 PM	System
<input type="checkbox"/>	Antepartum Lab Hx 24-28 wk (ACOG)	Obstetrics Gynecology	10/21/15 03:06:18 PM	System
<input type="checkbox"/>	Antepartum Lab Hx 32-36 wk (ACOG)	Obstetrics Gynecology	10/21/15 03:06:28 PM	System

System versus Custom Templates

- System templates are listed under the Type column in regular font.
- System templates cannot be edited but can be saved and renamed to make a copy that can be customized.
- Custom templates are listed under the Type column in italics.
- Custom templates can be shared with system users that have provider or clinical privileges.

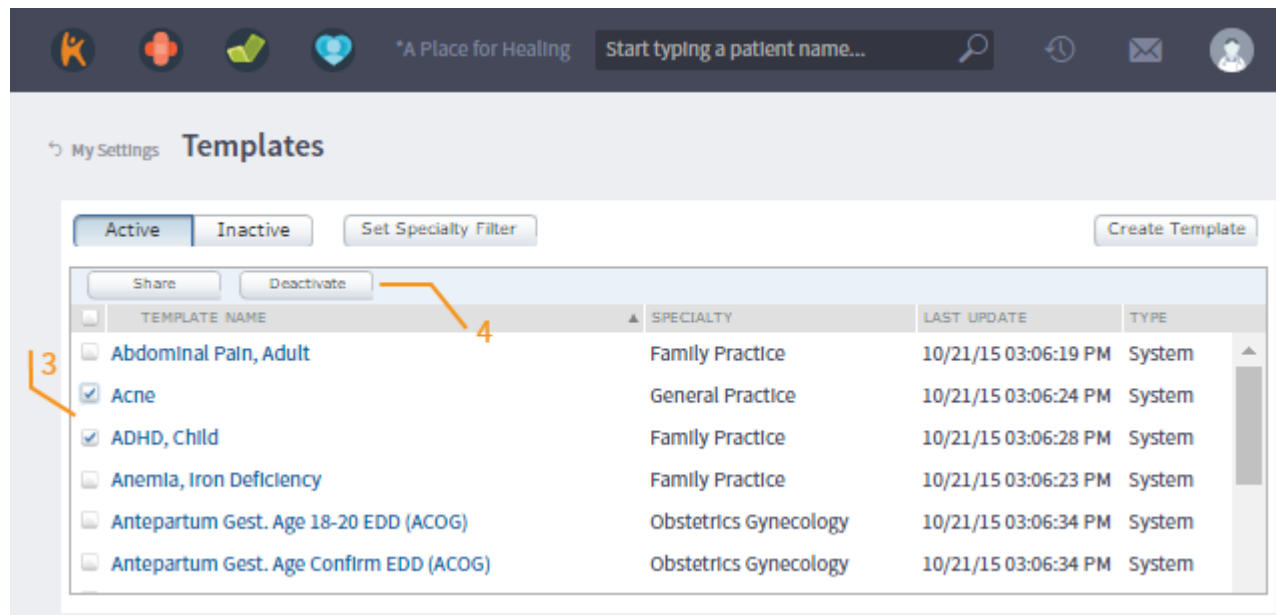


Deactivate or Reactivate a Template

Inactivating templates that are not currently in use by the practice can be beneficial in that it will shorten the active template list within a note, making a search more efficient. Inactivating a template simply removes the template from view and does not delete it from the system.

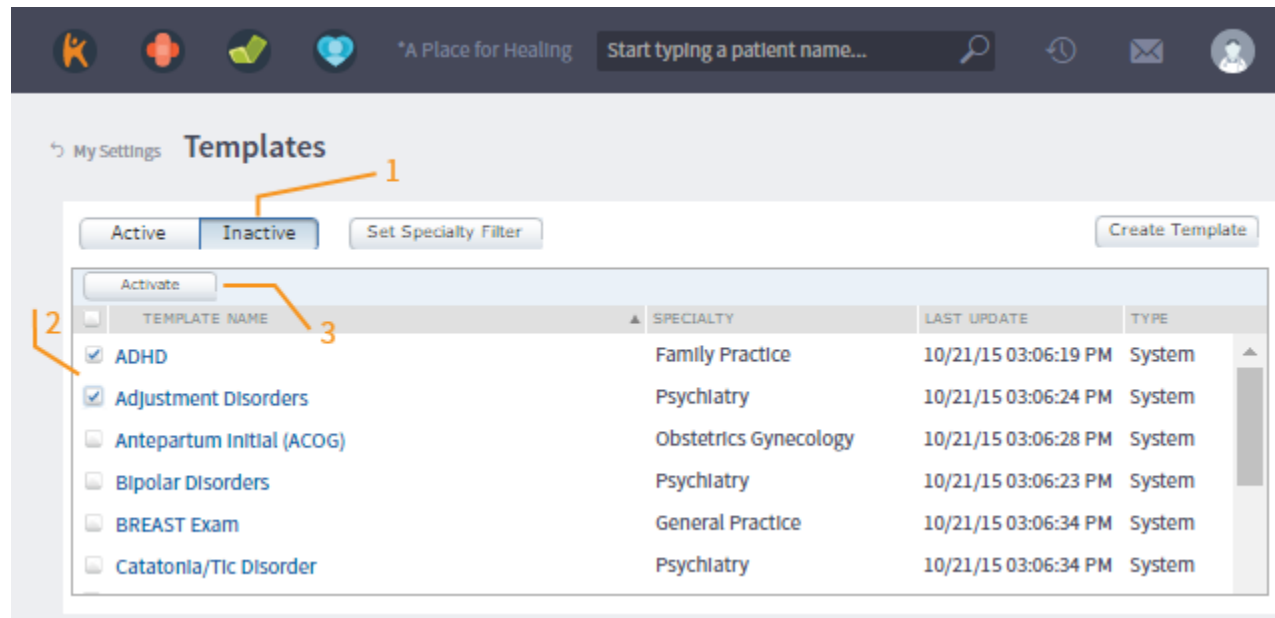
▶ To deactivate a template

1. In Kareo Clinical, click the **User icon** in the top right of the window and select **My Settings**.
2. Click **Templates** on the left menu. The *Templates* page opens to *Active* templates.
3. Check the box next to each template you want to deactivate.
4. Click **Deactivate**. The selected templates are moved to the *Inactive* list.



▶ To reactivate a template

1. Click the **Inactive** button to view a list of inactive templates.
2. Click to check the box next to each template you want to reactivate.
3. Click **Activate**. The selected templates are moved to the *Active* list.



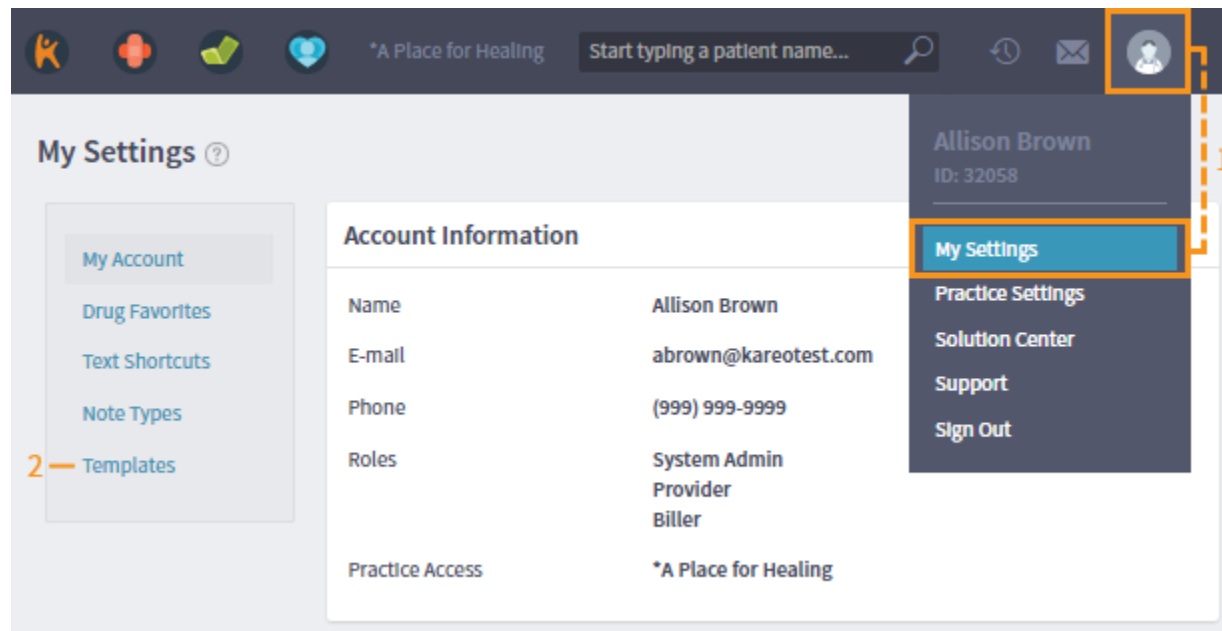
Share Custom Templates

Customized templates can be shared with other users in the practice who have provider or clinical privileges. Once a template is shared, it appears in the clinical staff's and/or provider's Template Editor page; the template Type will be marked as "Shared". A notification message will be sent to the each person with whom it was shared.

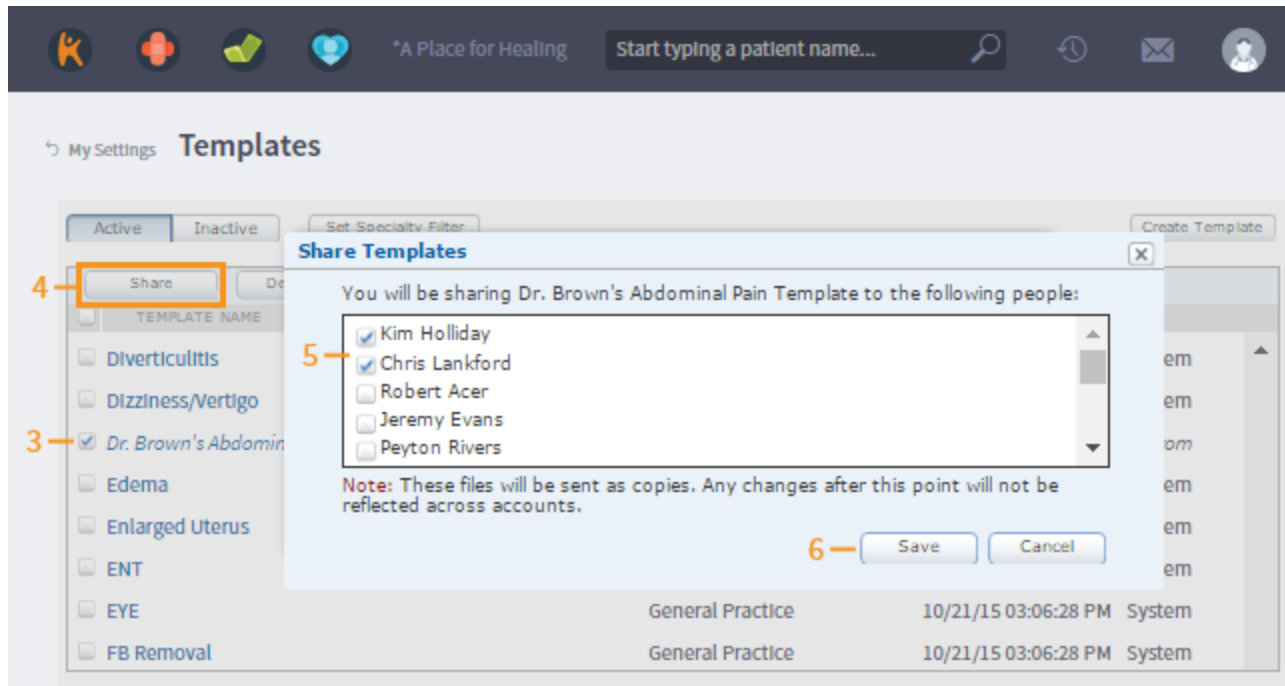
Note: A shared template is sent as a copy. If any changes are made to a shared template, the template owner must "re-share" the template to reflect the changes.

▶ To share a custom template

1. In Kareo Clinical, click the **User icon** in the top right of the window and select **My Settings**.
2. Click **Templates** on the left menu. The *Templates* page opens to *Active* templates.



3. Click to check the box next to each template you want to share.
4. Click **Share**. The *Share Templates* window opens.
5. Click to check the box next to the name of each person with whom you want to share the template(s).
6. Click **Save**.



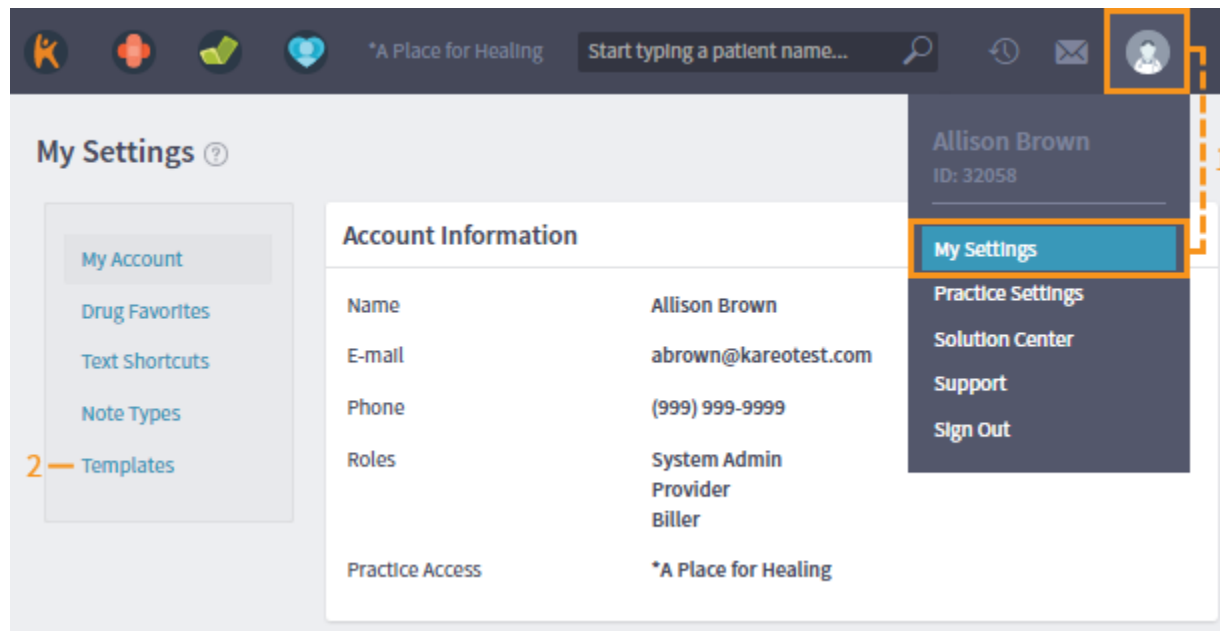
Create a Template

You can create a custom template in two ways: Either by creating it from blank or by copying and renaming an existing template. When naming your template, do not use the word EXAM or EXAMINATION in the title; the template will not appear as an active template choice in the live note.

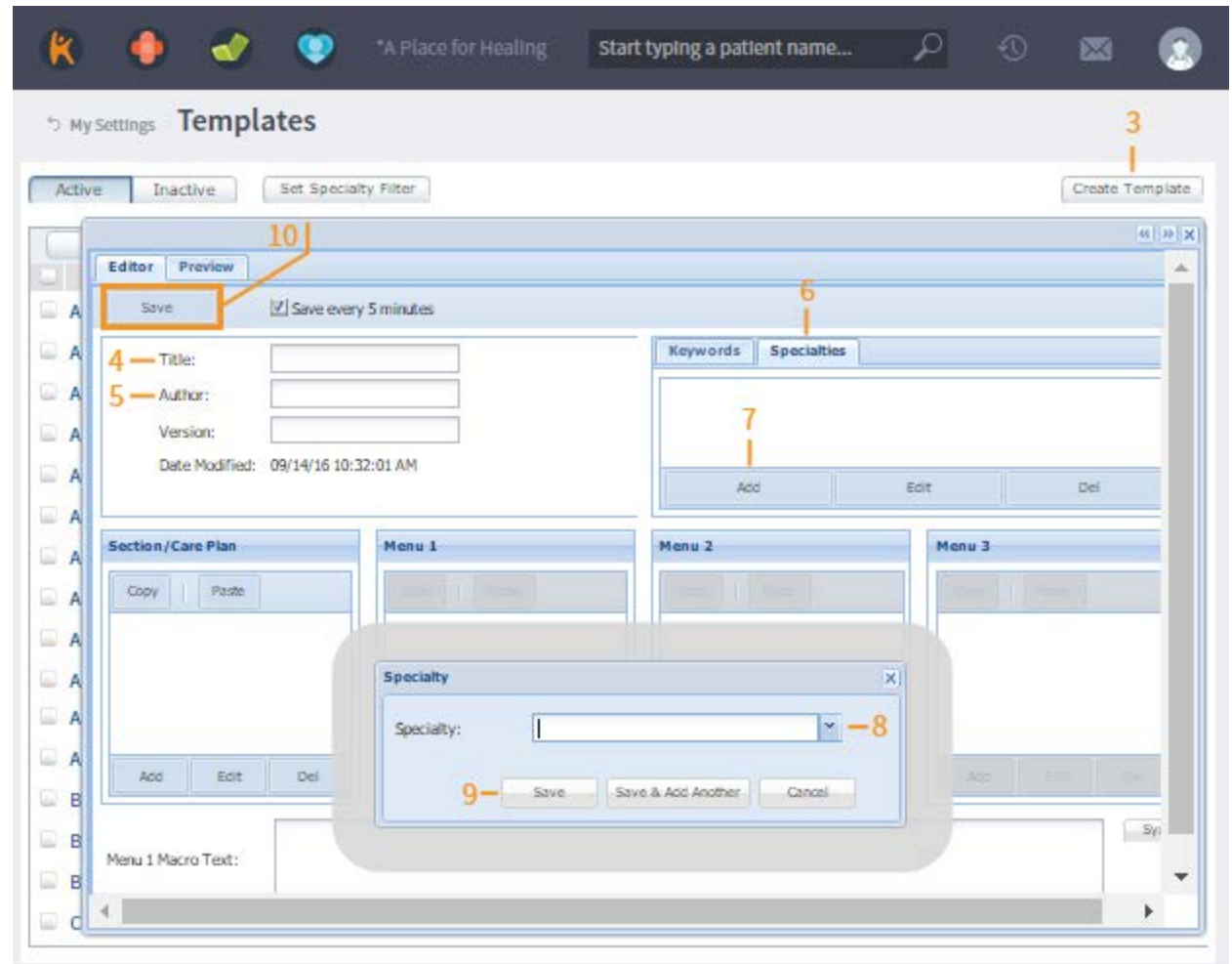
Create a New Template from Blank

▶ To create a new template from blank

1. In Kareo Clinical, click the **User icon** in the top right of the window and select **My Settings**.
2. Click **Templates** on the left menu. The *Templates* page opens to *Active* templates.



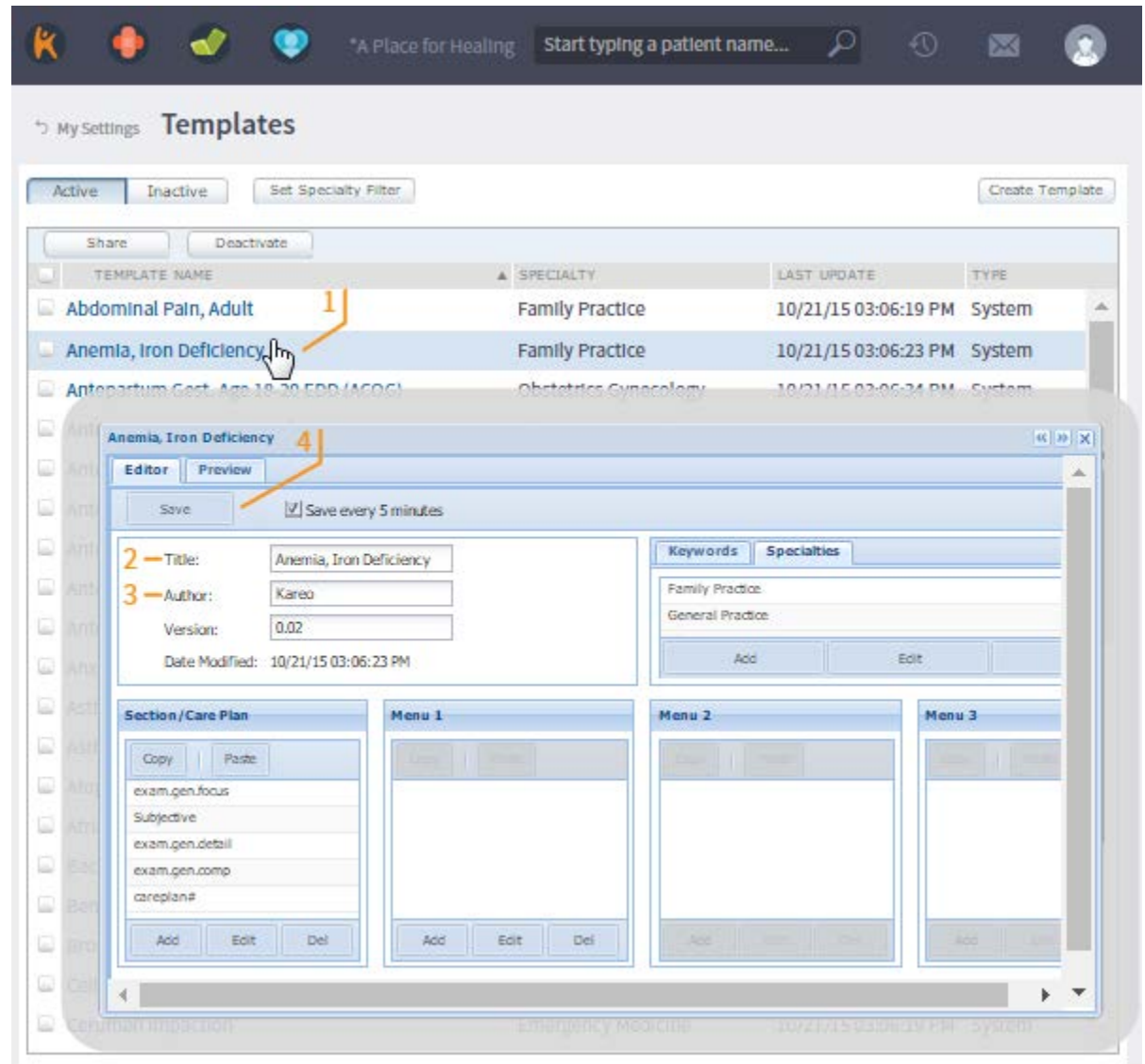
3. Click **Create Template**.
4. Enter a title in the *Title* field.
5. Enter a name in the *Author* field.
6. Click the *Specialties* tab.
7. Click **Add**. The *Specialty* window opens.
8. Click the drop-down arrow and select one or more specialties that best fit the template.
9. Click **Save**. The *Specialty* window closes.
10. Click **Save**. To make modifications, see “Customize a Template” section.



Create a New Template by Renaming

► To create a custom template by renaming an existing template

1. Click on a template title. The template editor opens.
2. Enter a title in the *Title* field that is different than the built-in template name.
3. Enter a name in the *Author* field.
4. Click **Save**. To make modifications, see “Customize a Template” section.

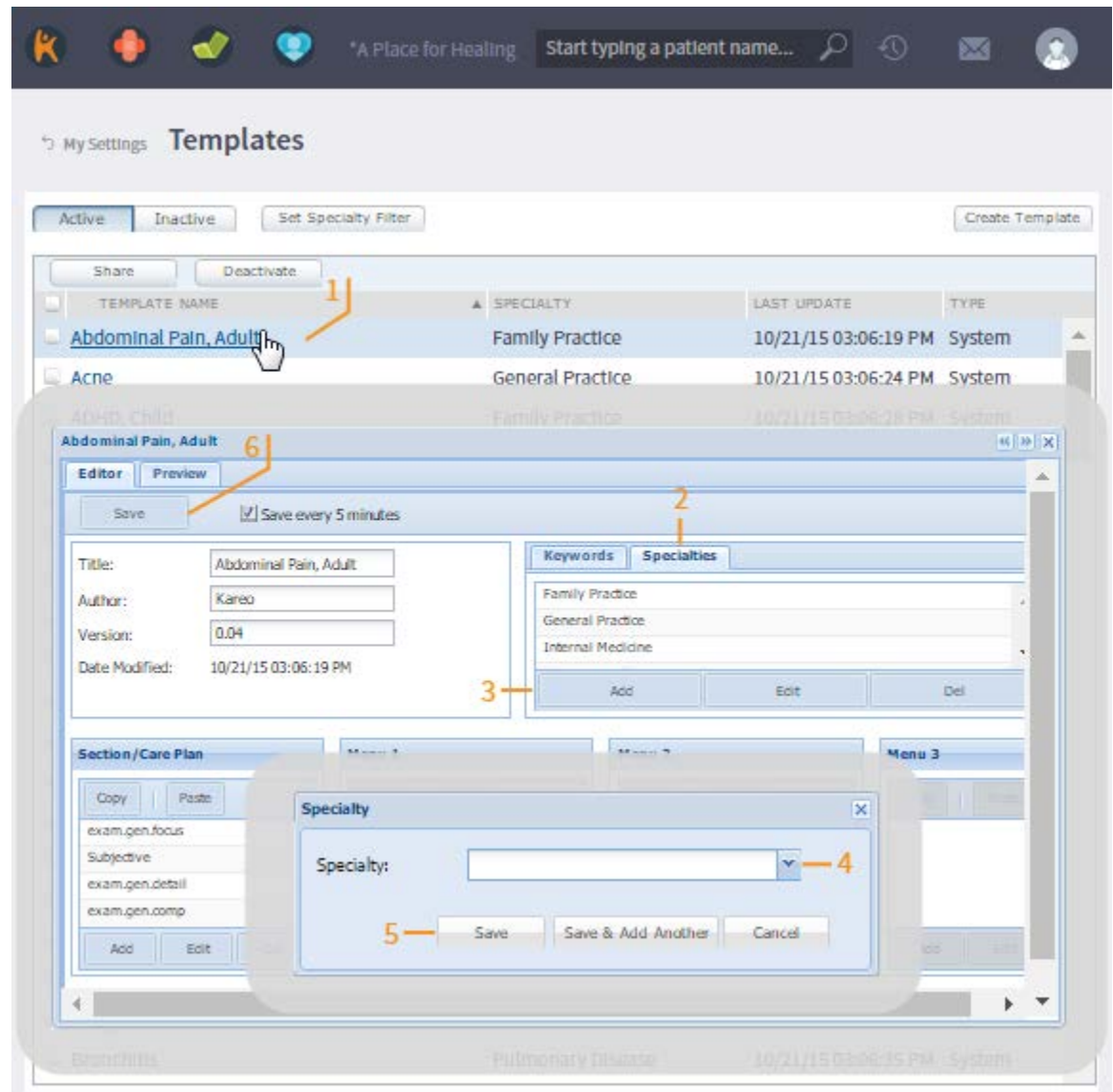


Add a Specialty

The Specialty tab enables a user to select a Specialty for the purpose of sorting templates.

► To add a specialty

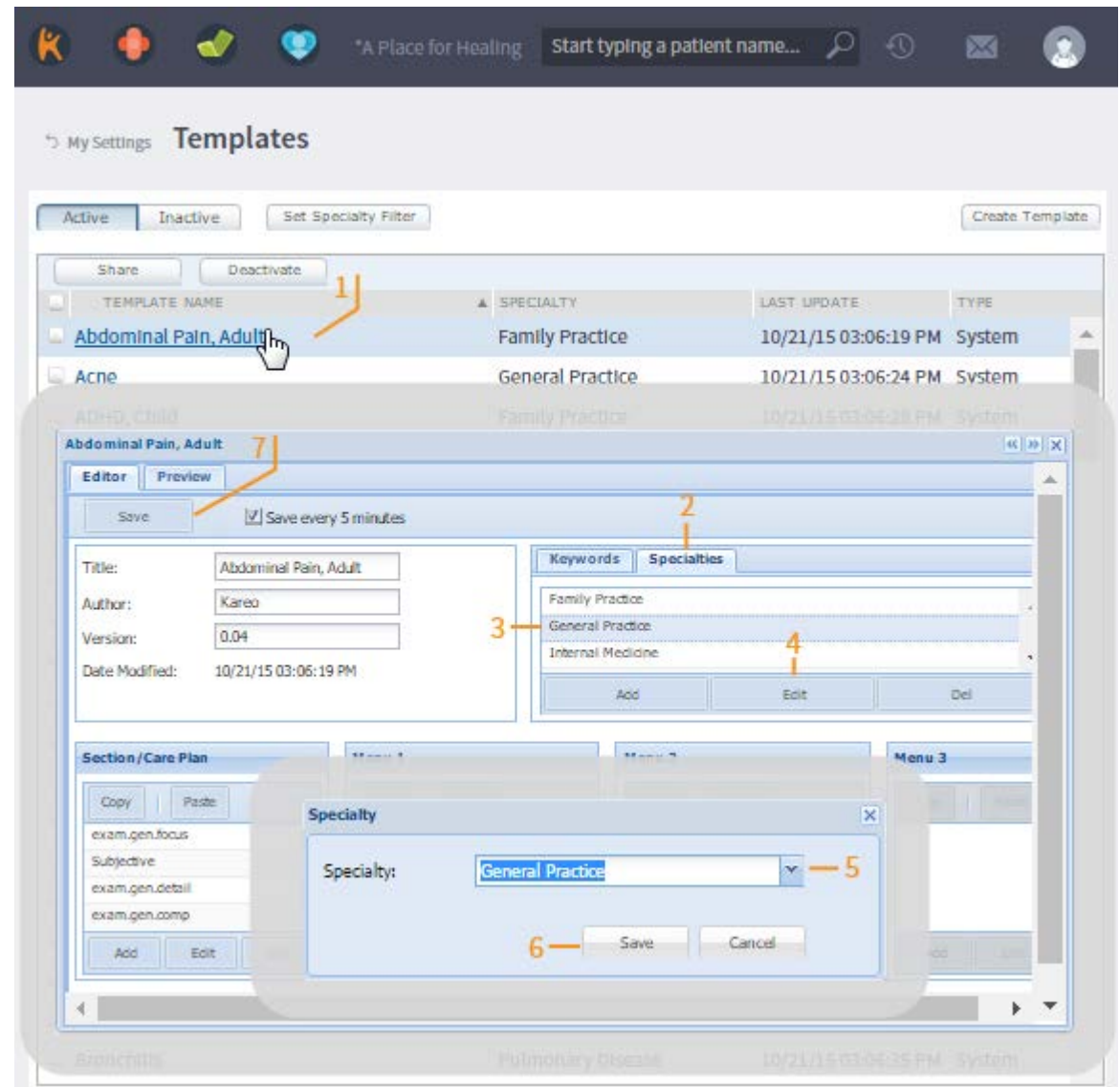
1. Click on a template title. The template editor window opens.
2. Click the *Specialties* tab.
3. Click **Add**. The Specialty window opens.
4. Click the drop-down arrow and select the specialty from the list.
5. Click **Save**. The *Specialty* window closes.
6. Click **Save** in the upper left of the template editor window.



Edit a Specialty

► To edit a specialty

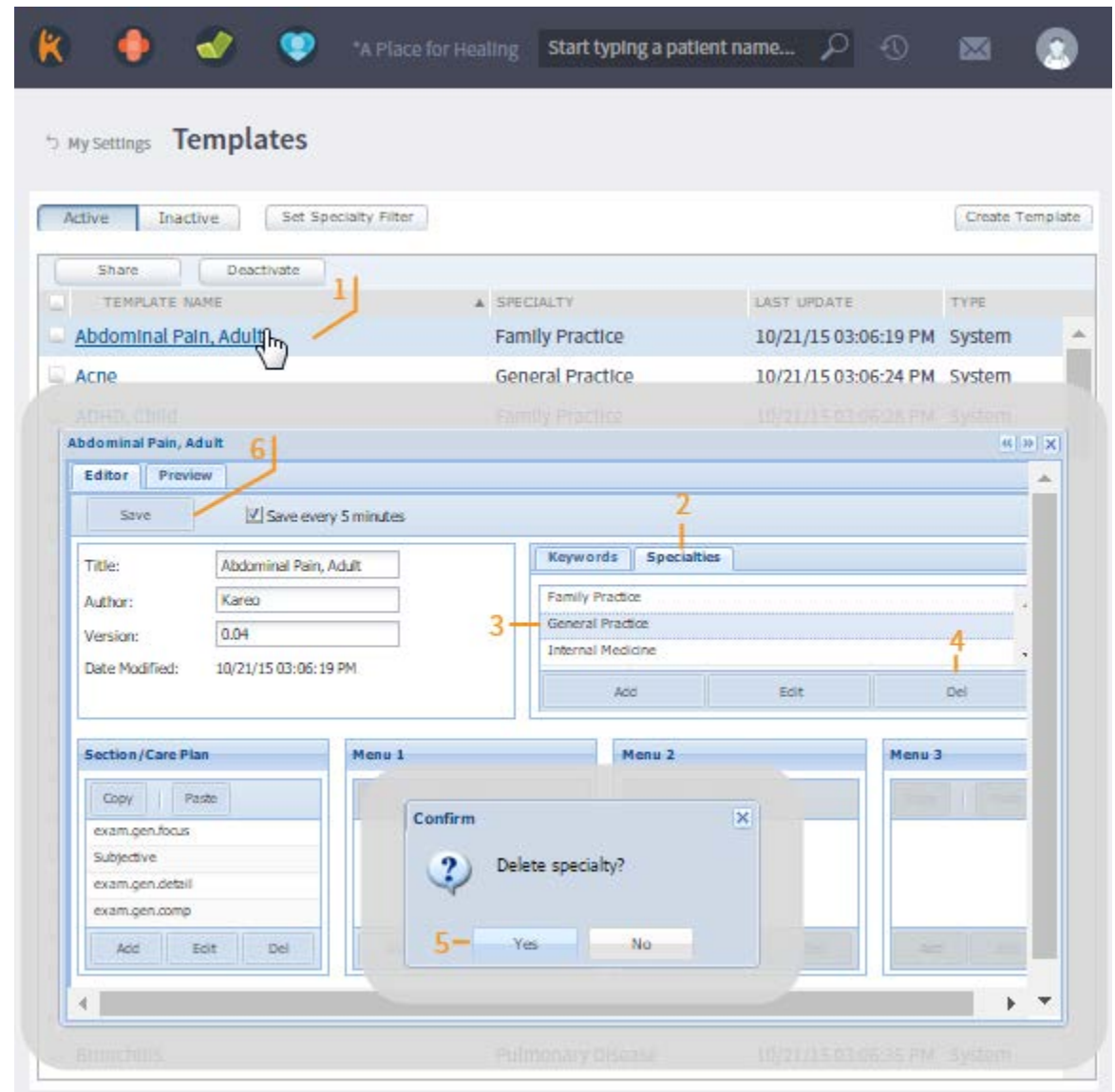
1. Click on a template title. The template editor window opens.
2. Click the **Specialties** tab.
3. Click the specialty name in the list that you want to change.
4. Click **Edit**. The *Specialty* window opens.
5. Click the drop-down arrow and select another specialty from the list.
6. Click **Save**. The *Specialty* window closes.
7. Click **Save** in the upper-left of the template editor window.



Delete a Specialty

► To delete a specialty

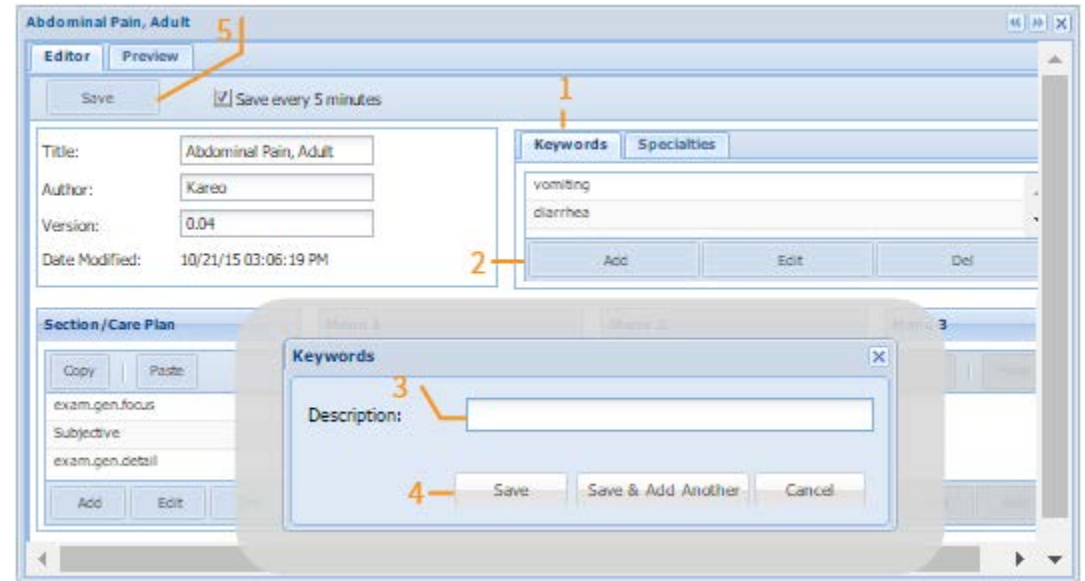
1. Click on a template title. The template editor window opens.
2. Click the **Specialties** tab.
3. Click the specialty name in the list that you want to delete.
4. Click **Del**. The confirmation window opens.
5. Click **Yes** to confirm the deletion.
6. Click **Save** in the upper-left of the template editor window.



Add a Keyword

► To add a keyword

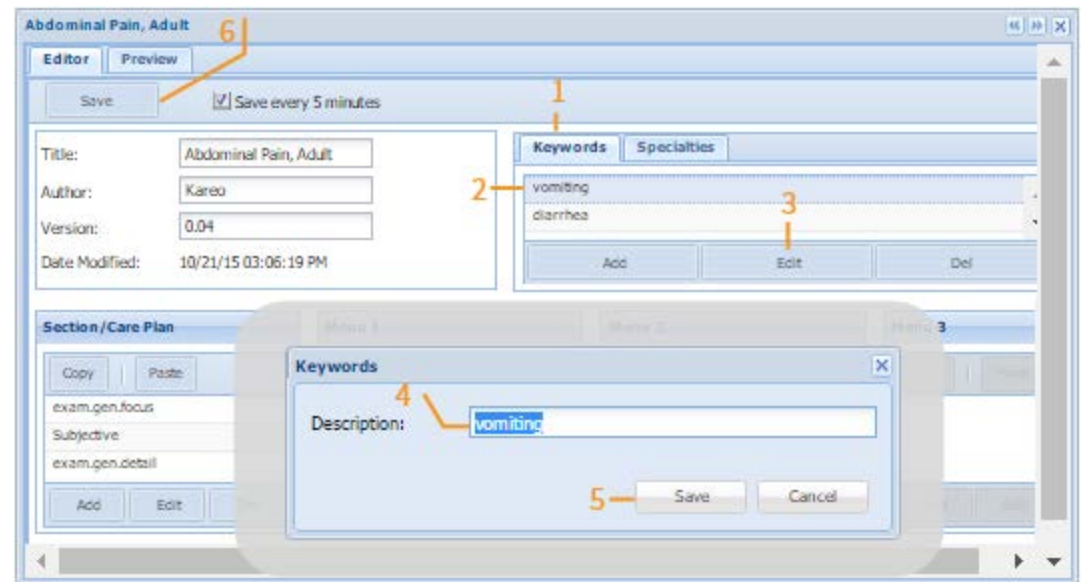
1. In the template editor window, click the **Keywords** tab.
2. Click **Add**. The *Keywords* window opens.
3. Enter the keyword in the *Description* field.
4. Click **Save**. The *Keywords* window closes.
5. Click **Save** in the upper-left of the template editor window.



Edit a Keyword

► To edit a keyword

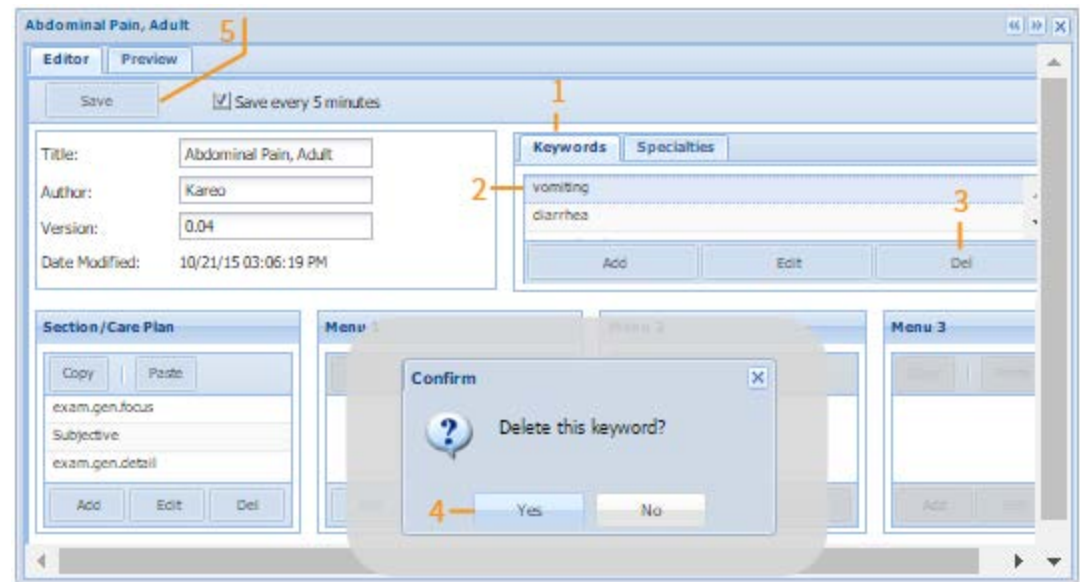
1. In the template editor window, click the **Keywords** tab.
2. Click the keyword in the list that you want to change.
3. Click **Edit**. The Keyword window opens.
4. Make changes to the keyword in the *Description* field.
5. Click **Save**. The Keyword window closes.
6. Click **Save** in the upper-left of the template editor window.



Delete a Keyword

► To delete a keyword

1. In the template editor window, click the **Keywords** tab.
2. Click the keyword in the list that you want to delete.
3. Click **Del**. The confirmation window opens.
4. Click **Yes** to confirm the deletion.
5. Click **Save** in the upper-left of the template editor window.

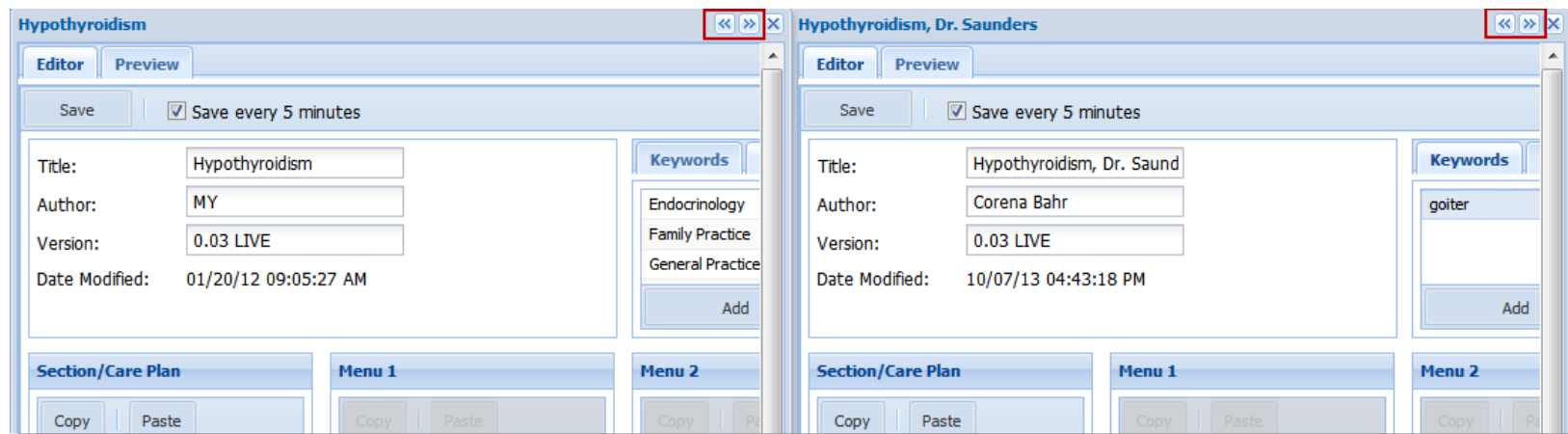


Work with Two Templates

You can have up to two templates open at the same time and view or work with them side-by-side.

▶ To work with two templates

1. Click on a template name from the template list to open it.
2. On the top right of the template editor window, click the right or left arrow to snap it to the appropriate margin.
3. Open a second template and click the appropriate arrow to snap it to the opposite margin.



Customize a Template

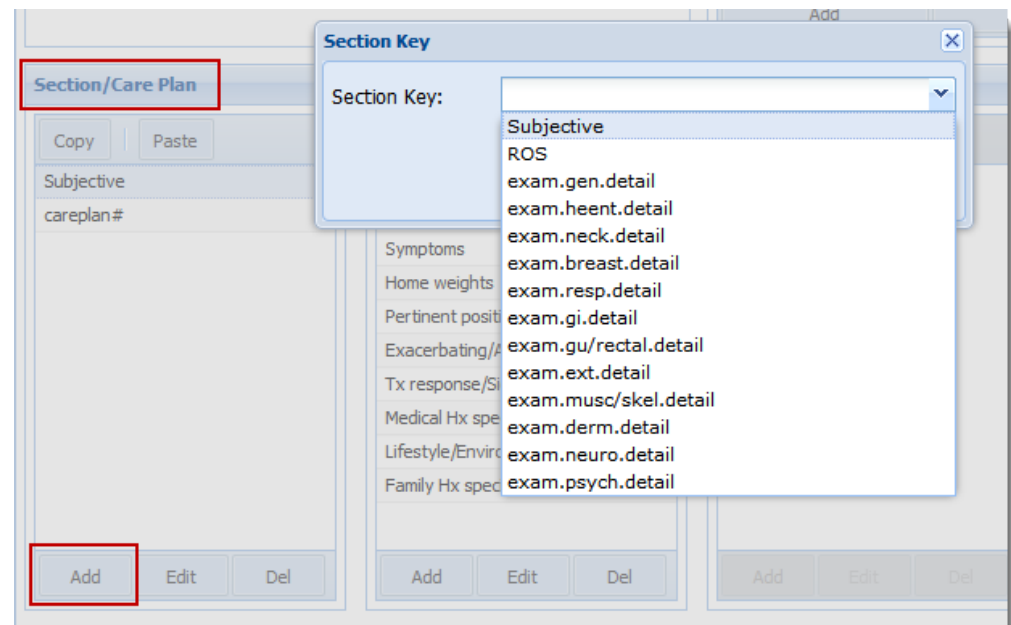
Add Sections to the Section/Care Plan Menu

Note that only the Subjective, ROS, Objective and Plan portions of a SOAP note have access to templates.

For exams, the type of exam selected will be the default exam that populates under the 1-Click Normal & Pertinent Findings. Note: Do not use .focus or .comp exams; these templates are inactive and will not populate in the note.

► To add a section to the Section/Care Plan menu

1. On the template editor window, in the Section/Care Plan box, click **Add** and then **Section**.
2. Select Subjective, ROS or Exam type from the drop-down menu. Note that there are key codes that can be used to make some of the note headings templatable (see the table, next page). Other than those in the table, do not free-type a Section Key.
3. Click **Save**.



Key Codes for Note Headings

Heading	Note Type	Key Code
DSM-5	Psych/Therapist Initial Visit and Psych/Therapist Progress Note	KCT_DSM5
Diagnostic Studies	Urgent Care	KCT_DS
Form	Office Form	KCT_OfficeForm
Gestational Age	ACOG	KCT_GA
Indication	Procedure	KCT_procedure_INDICATION
Medical Decision Making	Urgent Care	KCT_MDM
Mental/Functional	H&P, SOAP	KCT_Cognitive/Functional
Minor Procedures	H&P	KCT_MP
MSE	Psych/Therapist Initial Visit and Psych/Therapist Progress Note	KCT_MMSE
OB Exam	ACOG	KCT_OBEx
Continue to next page...		

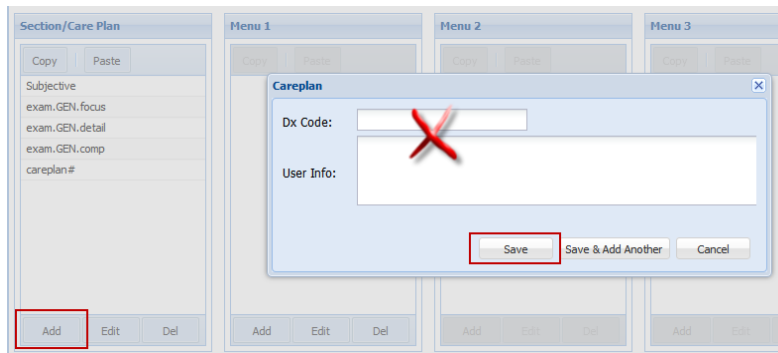
Heading	Note Type	Key Code
Past Lab Hx	ACOG	KCT_PastLabHx
Past Pregnancy Hx	ACOG	KCT_PastPregHx
Performed By	Procedure	KCT_procedure_PERFORMED_BY
Procedure	Procedure	KCT_procedure_PROCEDURE
Psych Impression	Psych/Therapist Initial Visit and Psych/Therapist Progress Note	KCT_PsychImp
Psych Intervention	Psych/Therapist Progress Note	KCT_PSYINT
Psych Symptom/Follow Up	Psych/Therapist Progress Note	KCT_PSYSYFU
Psych Syndromes	Psych/Therapist Progress Note	Subjective
PsychFHx	Psych/Therapist Initial Visit	KCT_PsychFHx
PsychHx	Psych/Therapist Initial Visit	KCT_PsychHx
PsychSHx	Psych/Therapist Initial Visit	KCT_PsychSHx
Continue to next page...		

Heading	Note Type	Key Code
Reason for Referral	Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary	KCT_REASON
Tests	Psych/Therapist Initial Visit	KCT_Tests
Tests and Measures	Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary	KCT_Cognitive/Functional_TEST
Treatment	Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary	KCT_Cognitive/Functional_TREAT

Add Care Plan to the Section/Care Plan Menu

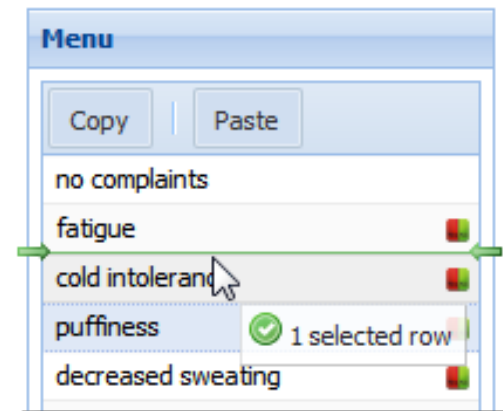
► To add a care plan to the Section/Care Plan menu

1. On the Template Editor window, in the Section/Care Plan box, click **Add** and then **Care Plan**.
2. Do not enter a Dx Code or other info.
3. Click **Save**.



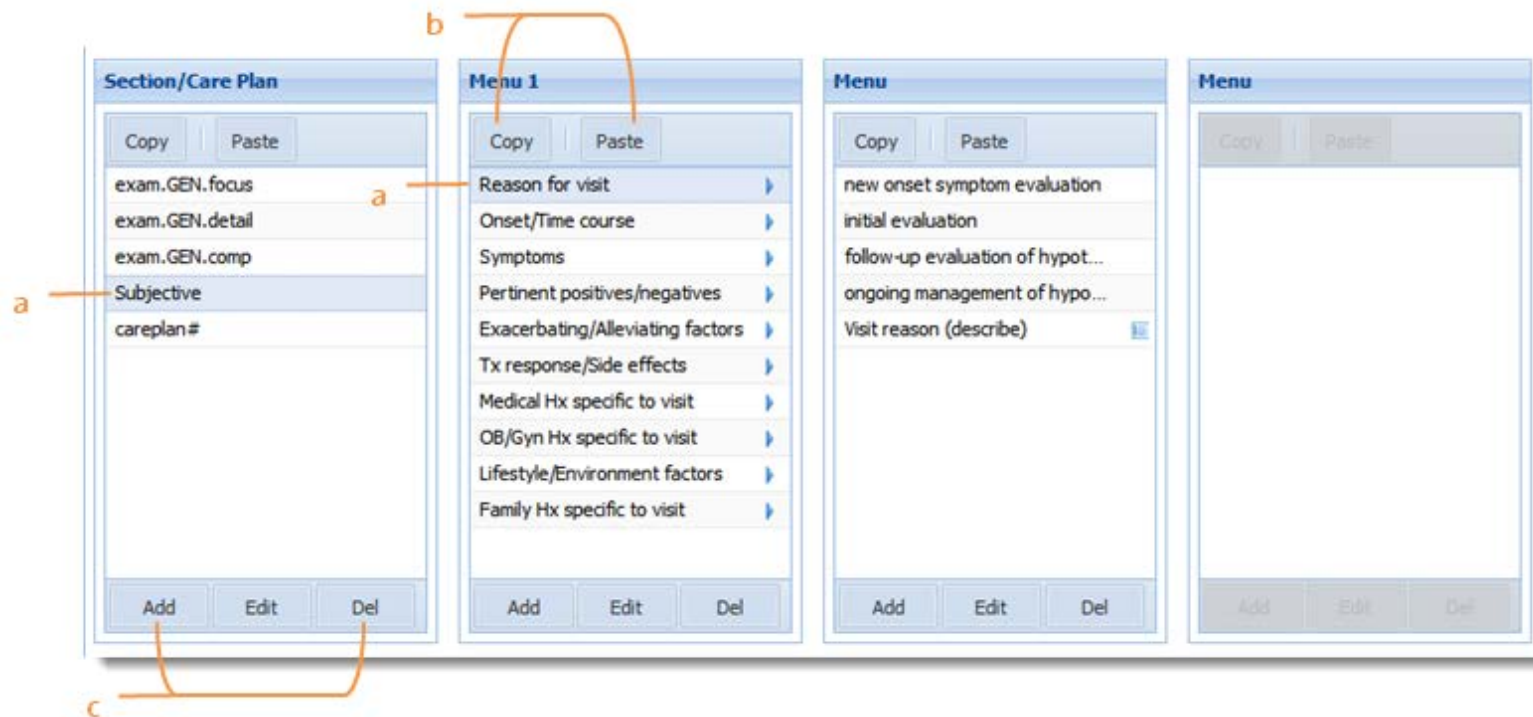
Reorder Menu Items

To reorder menu items, click and drag the menu item to the desired location.



Add, Edit, Delete Menu Items to Subjective and ROS Sections

► To add, edit, delete menu items



a. Click on an item to highlight it.

- Click **Add** in the Menu box.
- Select a Child Type from the drop-down menu; see section “Menu Child Types.”
- Create a label and macro text; see section “Use Macros.”
- Click **Save**.

Menu 1: The Label and Macro fields must be populated for the menu item to function correctly.

Menu 1

Child Type: Menu2 (Multi-Select) ▼

Label: Must have a label! →

Macro: Must have macro text! →

Save Save & Add Another Cancel

Menus 2 and 3: The Label field must be populated. Enter text if needed. No text defaults to the label. See section “Label versus Text Fields.”

Menu 2

Child Type: Menu3 (Multi Select) ▼

Label: Must have a label →

Text: Enter text if needed. No text defaults to the label. →

Save Save & Add Another Cancel

- b. **Copy/Paste:** To copy and paste an item, click on it to highlight and click **Copy**. Click **Paste** in the desired template. Items can only be copied section to section or menu to menu (i.e.: Menu 1 to Menu 1). To copy between templates, open both; see section “Work with Two Templates.”
- c. **Add/Edit/Delete:** To make modifications, click on an item to highlight it, then click **Add**, **Edit** or **Delete**. If you select Add or Edit, a pop-up window will appear allowing you to make changes. Note that when deleting Section/ Care Plan items, the parent menu and all of the child menus will be deleted.

Label versus Text Fields

Label: Text entered in the Label field of the Template Editor will appear in the template menu of the note.

Text: Text entered in the Text field will populate the note.

Note that if the text field of a Menu 2 or Menu 3 item is not populated, the text will default to what's in the Label field.

Template Editor View

Label in the Note View

Text in the Note View

Subjective

Patient presents for evaluation of new onset symptoms.

Using Parenthesis

Used mostly in Psych specialty templates, parenthesis, "()", can be used in the label field of menu 1 where multiple menu items are used to create a sentence. This indicates that it is important to populate the menu items within the parenthesis to generate a complete sentence.

Menu Child Types

Below are examples of the various menu child types, what they look like in a note, and their functionality.

Menu 2 (Multi Select)

Ability to select more than one answer in the next menu.

Template Editor View

Menu 1

Child Type: Menu2 (Multi-Select)

Label: Reason for visit

Macro: Patient presents for {xxx}.

Save Cancel

Note View

Default

- ☒ Reason for visit
- ☐ Duration
- ☐ Onset
- ☐ Severity/Course

Reason for visit

- ☒ new onset symptom evaluation
- ☐ initial evaluation
- ☒ follow-up evaluation
- ☐ ongoing management
- ☐ Visit reason (describe)

Menu 2 (Single Select)

Ability to select one answer in the next menu.

Template Editor View

Menu 1

Child Type: Menu2 (Single-Select)

Label: Clear

Macro:

Save Save & Add Another Cancel

Note View

Cough

- ☐ Reason for visit
- ☐ Onset/Time course
- ☐ T max (Fahrenheit)
- ☐ Smoking status
- ☒ Sputum features
- ☐ Cough features
- ☐ Pertinent positives/negatives
- ☐ Medical Hx specific to visit
- ☐ Immunizations

Sputum features

- ☐ none
- ☐ minimal
- ☐ copious
- ☒ clear
- ☐ white
- ☐ yellow
- ☐ green
- ☐ blood-tinged
- ☐ bloody
- ☐ plug-shaped
- ☐ Other sputum features (describe)

+/-

Ability to select either a positive or negative answer for the current menu.

Template Editor View

Menu 2

Child Type: (+)/(-)

Label: hacking

Text:

Save Cancel

Note View

Cough

- ☐ Reason for visit
- ☐ Onset/Time course
- ☐ T max (Fahrenheit)
- ☐ Smoking status
- ☒ Sputum features
- ☒ Cough features
- ☐ Pertinent positives/negatives
- ☐ Medical Hx specific to visit

hacking (+) (-)

barking/whoop sound (+) (-)

paroxysmal (+) (-)

worse at night (+) (-)

worse in morning (+) (-)

None

Select's the menu item to populate the note (with no additional characteristics).

Template Editor View

Menu 2

Child Type: None

Label: clear

Text:

Save Cancel

Note View

Cough

- ☐ Reason for visit
- ☐ Onset/Time course
- ☐ T max (Fahrenheit)
- ☐ Smoking status
- ☒ Sputum features
- ☐ Cough features
- ☐ Pertinent positives/negatives
- ☐ Medical Hx specific to visit
- ☐ Immunizations

none

minimal

copious

clear

white

yellow

green

blood-tinged

bloody

plug-shaped

Other sputum features (describe)

Picker

Ability to add date, alpha or numbers in the next menu.

Template Editor View

The screenshot shows a window titled "Menu 1" with the following fields:

- Child Type:** Picker (selected in a dropdown menu)
- Label:** T max (Fahrenheit)
- Macro:** T max: {xxx} F.

At the bottom right are "Save" and "Cancel" buttons.

Note View

The screenshot shows a "Cough" section in a note view. It contains a list of checkboxes with expandable options (indicated by blue arrows):

- ☐ Reason for visit
- ☐ Onset/Time course
- ☒ T max (Fahrenheit) — This option is expanded to show a sub-menu.
- ☐ Smoking status
- ☐ Sputum features
- ☐ Cough features
- ☐ Pertinent positives/negatives
- ☐ Medical Hx specific to visit

The expanded sub-menu for "T max (Fahrenheit)" is titled "(degrees, specify F)" and contains a numeric keypad with digits 0-9, a decimal point, and a "B" button. It also has "Save" and "Cancel" buttons at the bottom.

Create a Picker

The menu item Picker can be created in Menus 1 and 2.

▶ To create a picker

1. On the Template Editor window, in the Menu 1 or 2 box, click **Add**.
2. Select Picker in the Child Type drop-down menu.
3. Enter a label.
4. Enter macro text (Menu 1) or text (Menu 2) if desired.
5. Click **Save**.
6. Create a child menu in order to identify the type of picker (date, number, alpha):
 - Highlight the picker name and in the next menu, click **Add**.
 - Select date, alpha or numeric from the Type drop-down menu.

- Enter a label.
- Select Append, Prepend or Replace from the Conjunction drop-down menu; see next section “Conjunctions.”
- Click **Save**.

Conjunctions

When a Picker, None or +/- Menu 3 item is selected, conjunctions can be used in the Subjective, ROS and Exam sections of the template. A conjunction directs the template on where to place picker content or a “none” Menu 3 answer for the previous menu. See more examples, next page.

Conjunction Type	Example using “brown” as the conjunction
Prepend	Before: brown dog
Append	After: dog brown
Replace	Replace: brown
When using {xxx}	{xxx} will override the conjunction command. For example: “The {xxx} dog ran down the street.” will be “The brown dog ran down the street.”

Prepend

Template Editor View

Menu 2

Child Type:

Label:

Text:

Menu 3

Child Type:

Label:

Text:

Conjunction:

Note View

Subjective

Pain is 1 out of 10.

Append

Template Editor View

The screenshot shows a dialog box titled "Menu 2". It contains the following fields:

- Child Type:** A dropdown menu with "Menu3 (Multi Select)" selected.
- Label:** A text field containing "Reasons for nonadherence".
- Text:** A large text area containing "reasons for nonadherence include".
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

The screenshot shows a dialog box titled "Menu 3". It contains the following fields:

- Child Type:** A dropdown menu with "None" selected.
- Label:** A text field containing "stomach upset".
- Text:** A large empty text area.
- Conjunction:** A dropdown menu with "Append" selected.
- Buttons:** "Save", "Save & Add Another", and "Cancel" buttons at the bottom right.

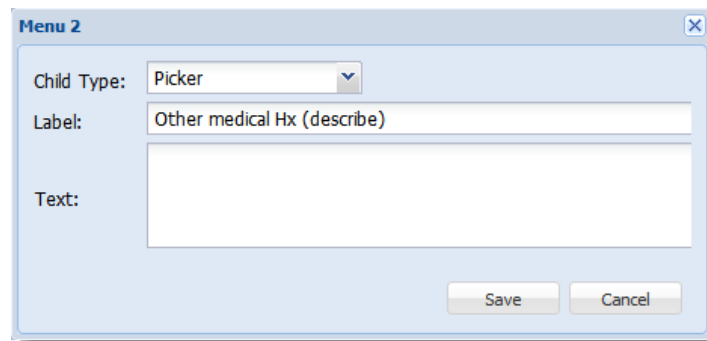
Note View

Subjective

Treatment effects: reasons for nonadherence include stomach upset.

Replace

Template Editor View



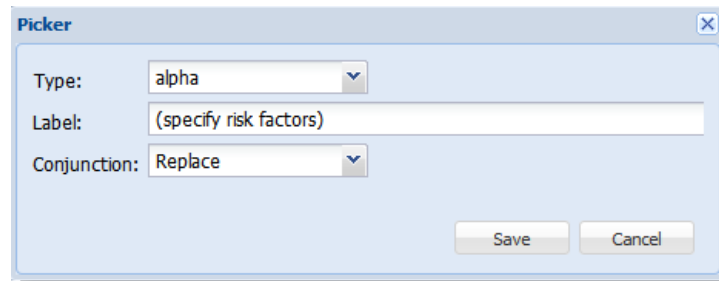
Menu 2

Child Type: Picker

Label: Other medical Hx (describe)

Text:

Save Cancel



Picker

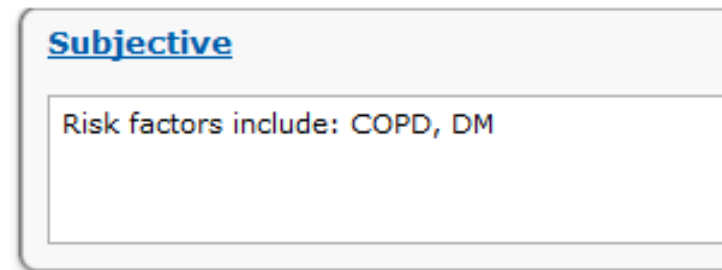
Type: alpha

Label: (specify risk factors)

Conjunction: Replace

Save Cancel

Note View

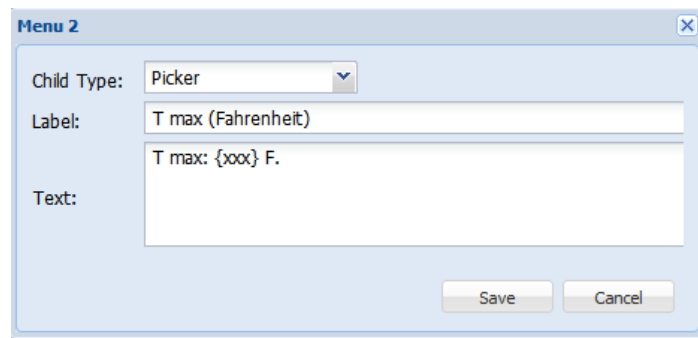


Subjective

Risk factors include: COPD, DM

{xxx} with Conjunctions

Template Editor View



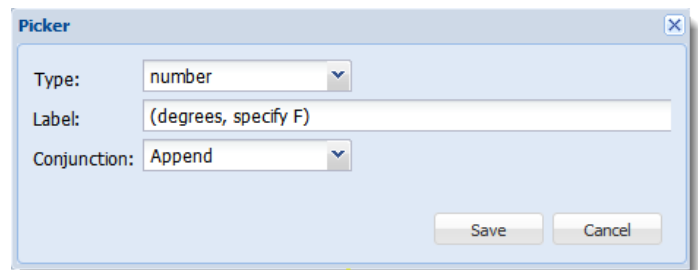
Menu 2

Child Type: Picker

Label: T max (Fahrenheit)

Text: T max: {xxx} F.

Save Cancel



Picker

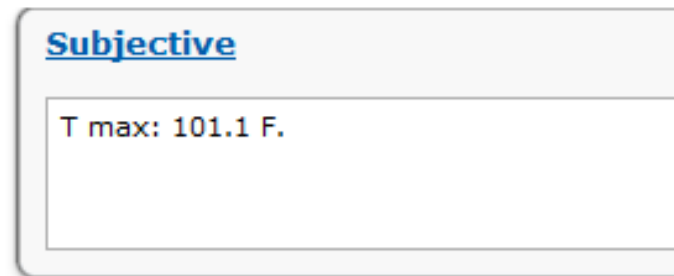
Type: number

Label: (degrees, specify F)

Conjunction: Append

Save Cancel

Note View



Subjective

T max: 101.1 F.

Macros

Macros are commands that direct the Template Editor to perform an action. Macro fields can be found in two places in the Template Editor:

Menu 1 Add/Edit box

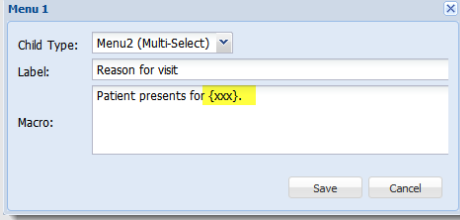
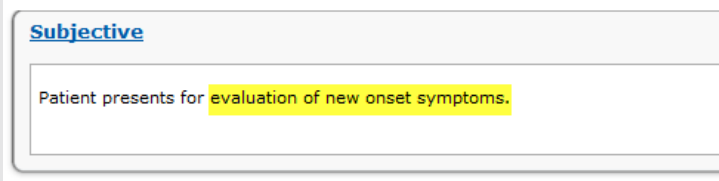
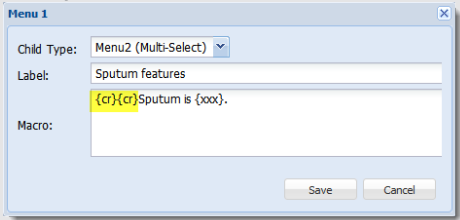
A text box in Menu 1 that populates the note. This box must be populated to correctly create a Menu 1 item.

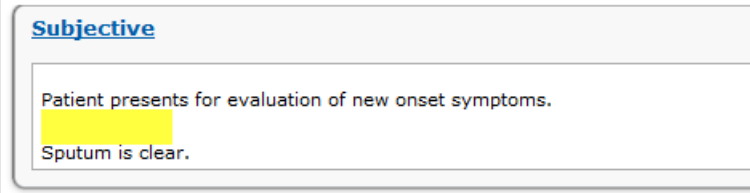
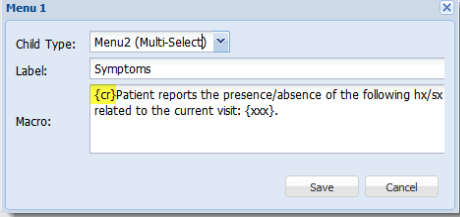
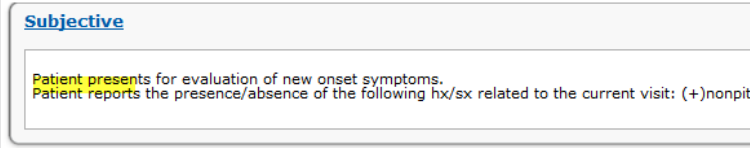
Bottom of the Template Editor window

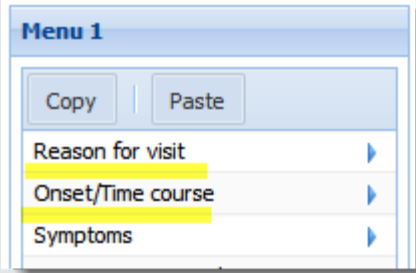
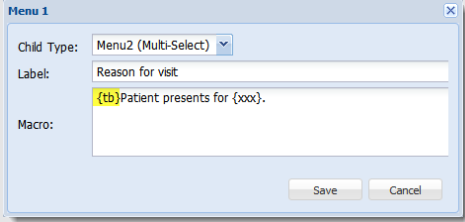
Displays the macro text for every Menu 1 item. Each Menu 1 item is separated by an ore bar (|).

Sync: If a change is made to the Menu 1 Macro field, and Sync is selected, then the change will be reflected in the Menu 1 Macro Text box at the bottom of Template Editor window.

Macro Types

Code	Function	Example
{xxx}	Placeholder for the template to insert the next menu's text.	<p>Template Editor View</p>  <p>Note View</p> 
{cr}{cr}	Double space (double carriage return) or click the Enter key 2 times.	<p>Template Editor View</p>  <p>See next page for “Note View”</p>

Code	Function	Example
		<p>Note View</p> 
{cr}	Single space (single carriage return) or click the Enter key 1 time.	<p>Template Editor View</p>  <p>Note View</p> 

Code	Function	Example
	Ore bar. Continues to the next Menu 1 item.	<p>Template Editor View</p>  <p>Menu 1 Macro Text:</p> <pre>Patient presents for {xxx}. Condition {xxx}. {cr}{cr}Patient reports the present hx/sx related to the current visit: {xxx}. {cr}{cr}Pertinent positive/negative syn {cr}{cr}Patient reports that {xxx}. {cr}{cr}Medical history includes {xxx} {cr}{ {cr}{cr}If applicable/Equipment factors {xxx} {cr}{cr}Family history includes {xxx}</pre>
{tb}	Indent (5 spaces)	<p>Template Editor View</p>  <p>See next page for “Note View”</p>

Code	Function	Example
		<p>Note View</p> <div><p><u>Subjective</u></p><p>■ Patient presents for evaluation of new onset symptoms. Patient reports the presence/absence of the following hx/sx related</p></div>

Add Exam Menu Items

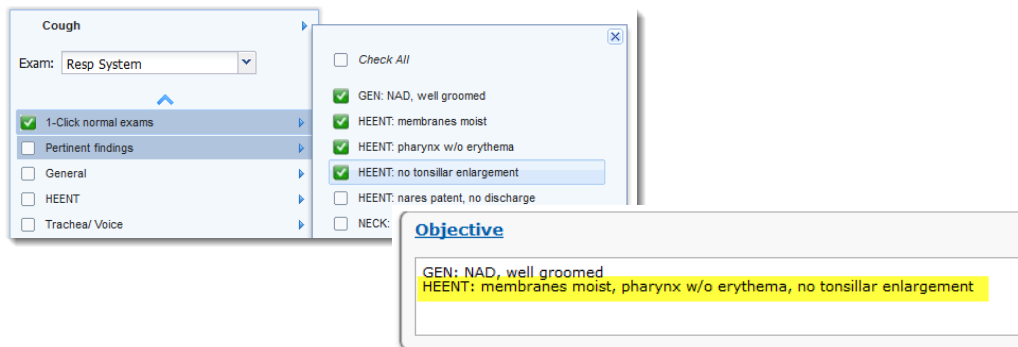
► To add an exam menu item

1. On the Template Editor window, select an exam to highlight it.
2. In the Menu box, click **Add**.
3. Select a Child Type from the drop-down menu.
4. Enter a label and macro text, see below.
5. Click **Save**.

Official Prefixes

Official prefixes are a set of commands that direct Template Editor to populate text in Menu 1 and 2 for the exam section. Macro text must contain an official prefix in Menu 1 or 2 in order for the system to read the text.

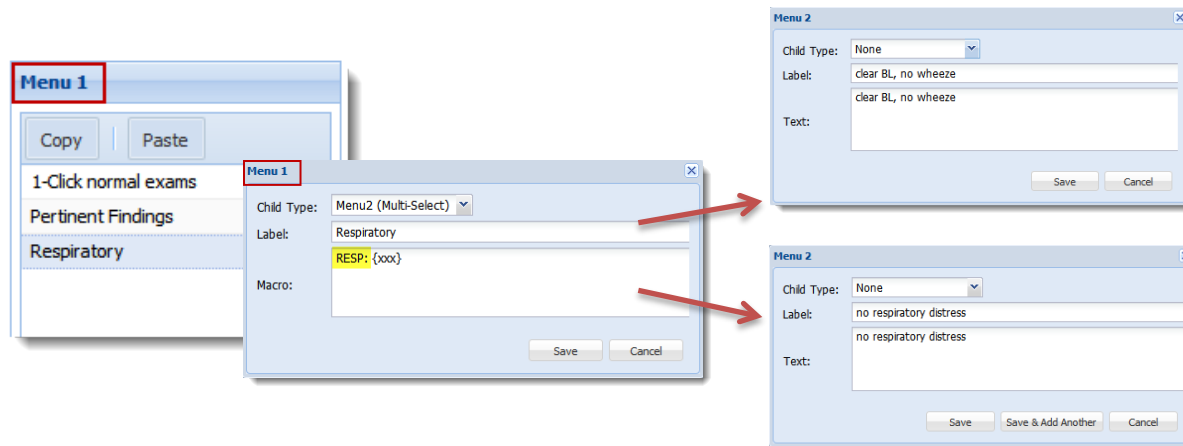
All official prefixes of the same system populate under one prefix in the note.



For use in the exam section of the Template Editor. Prefixes populate in this order in the note (the order can't be customized).

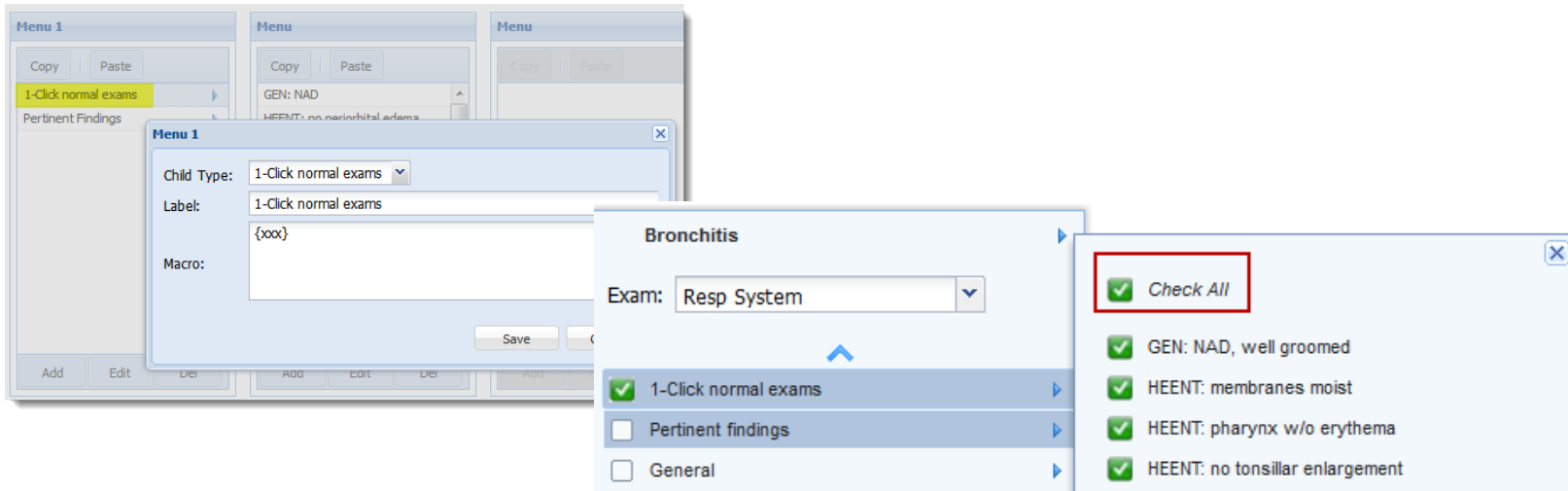
GEN:
HEENT:
NECK:
BREAST:
RESP:
CV:
GI:
GU/RECTAL:
DERM:
EXT:
MUSC/SKEL:
NEURO:
PSYCH:

Add Exam Text



Add 1-Click Normal

In an exam section, you can select all items in Menu 2 with one click. Always populates first in the Objective template menu.



Pertinent Findings

In in exam section, this item is used to address abnormal exam findings. Always populates second in the Objective template menu.

Custom-built Exam

Custom exams will populate after pertinent findings in the Objective template menu.

Selected System Exam

The system exam, exam (select system) detail, will default last in the Objective template menu.

Careplan

Add Menu 1 and Menu 2 Items

▶ To add a Menu 1 Care Plan items

1. On the Template Editor window, select a care plan to highlight it.
2. In the Menu box, click **Add**.
3. The Child Type (Checkbox List) and the macro {xxx} will auto-populate.
4. Enter a label (or order category).
5. Click **Save**.

The screenshot shows a dialog box titled "Menu 1". It has a light blue border and a close button (X) in the top right corner. Inside the dialog, there are three labeled fields: "Child Type:" with a dropdown menu currently showing "Checkbox List", "Label:" with a text input field containing the word "Procedures", and "Macro:" with a text input field containing the macro "{xxx}". At the bottom right of the dialog, there are two buttons: "Save" and "Cancel".

▶ To add a Menu 2 checkbox list

1. On the Template Editor window, select a Menu 1 item to highlight it.
2. In the Checkbox List box, click **Add**.
3. The Child Type (Checkbox List) and the macro {xxx} will auto-populate.
4. Enter a label (or order category).
5. Enter a tooltip if desired; tooltip appears with mouse rollover and does not appear as text in a note.
6. Click **Save**.

Checkbox List

Title: Patient provided with the following instructions:

Subtitle: lifestyle factors should be addressed in all patients

Info Tooltip: Add a tooltip if desired.

Save Cancel

Title versus Subtitle

Title: Displays in the template menu in a light blue box. The title functions similar as a subcategory to Menu 1. The Title does not appear as text in a note.

Subtitle: Displays as text under the title. This text can be used to provide additional information. The subtitle does not appear as text in a note.

Template Editor View

Checkbox List

Title: Patient provided with the following instructions:

Subtitle: lifestyle factors should be addressed in all patients

Info Tooltip:

Save Cancel

Note View

Hypothyroidism, Dr. Saunders

- ☐ Labs
- ☐ Imaging
- ☐ Procedures
- ☐ Medications
- ☒ Patient instructions
- ☐ Follow-up, Referrals

Patient provided with the following instructions:
lifestyle factors should be addressed in all patients

- ☐ Follow high fiber diet to reduce risk of constipation
- ☐ Follow low-fat, low-calorie diet to promote healthy weight

Add Orders

Entering an order in a note does not initiate a live order or update any other sections in Kareo.

▶ To add an order

1. On the Template Editor window, select a Checkbox List item to highlight it.
2. In the Items box, click **Add** and select Order.
3. Select the order type from the Type drop-down menu. See order types, next page.
4. Enter a label and text. No text will default to the label.
5. Enter a tooltip if desired; tooltip appears with mouse rollover and does not appear as text in a note.
6. Click **Save**.

Order Type	Description
Medication	Medication order
LAB	Laboratory order (e.g., lab order to be processed by clinical staff)
Fo	Front office (e.g., referral order for PT send to office staff to process)
Gen	General order (e.g., message to clinical staff to order flu vaccine to patient)
Text only	Text appears in the care plan template for the provider to read. Does not populate a note.
Note	Note order (e.g., patient education or excuse from school/work)

Template Editor View

Note View

Add Medication Orders

Note that RXCUI and Dosing ID are features currently unavailable. Entering medication order in a note does not initiate a live order or update any other sections in Kareo.

▶ To add a medication order

1. On the Template Editor window, select a Checkbox List item to highlight it.
2. In the Items box, click **Add** and select Medication.
3. Select the order type from the Type drop-down menu.
4. Enter drug and prescription information.
5. Enter a tooltip if desired; tooltip appears with mouse rollover and does not appear as text in a note.
6. Click **Save**.

The screenshot shows a 'Medication' dialog box with the following fields and values:

- Trans: eRx
- RXCUI: 43
- Dosing ID: 3031
- Drug: levothyroxine 50 mcg tab
- Sig: 1 tab PO once daily
- Fill: 90
- Dispense Form: tab(s)
- Refill: 4
- Pharmacy Note: Add pharmacy note if desired.
- Tooltip: Add tooltip if desired.

Buttons: Save, Cancel

Medication Order Type	Description
eRx (e prescription)	Adds eRx order* Adds medication to plan section of the note
Hx	Adds medication to medication list* Adds medication to plan section of the note
Note only	Adds medication to plan section of the note only

*Entering an order in a note does not initiate a live order or update any other sections in Kareo.