Navigate the Template Editor

Templates are used to streamline physician documentation. Kareo Clinical provides over 200 library templates that can easily be modified, renamed, 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.
a. Click to view a list of all *Active or Inactive* templates.
b. 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.
c. Click *Create Template* to build a custom template.
d. 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.)
e. 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.)
f. Click a *Template Name* to view or edit details.

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

<table>
<thead>
<tr>
<th>Heading</th>
<th>Note Type</th>
<th>Key Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>DSM-5</td>
<td>Psych/Therapist Initial Visit and Psych/Therapist Progress Note</td>
<td>KCT_DSM5</td>
</tr>
<tr>
<td>Diagnostic Studies</td>
<td>Urgent Care</td>
<td>KCT_DS</td>
</tr>
<tr>
<td>Form</td>
<td>Office Form</td>
<td>KCT_OfficeForm</td>
</tr>
<tr>
<td>Gestational Age</td>
<td>ACOG</td>
<td>KCT_GA</td>
</tr>
<tr>
<td>Indication</td>
<td>Procedure</td>
<td>KCT_procedure_INDICATION</td>
</tr>
<tr>
<td>Medical Decision Making</td>
<td>Urgent Care</td>
<td>KCT_MDM</td>
</tr>
<tr>
<td>Mental/Functional</td>
<td>H&amp;P, SOAP</td>
<td>KCT_Cognitive/Functional</td>
</tr>
<tr>
<td>Minor Procedures</td>
<td>H&amp;P</td>
<td>KCT_MP</td>
</tr>
<tr>
<td>MSE</td>
<td>Psych/Therapist Initial Visit and Psych/Therapist Progress Note</td>
<td>KCT_MMSE</td>
</tr>
<tr>
<td>OB Exam</td>
<td>ACOG</td>
<td>KCT_OBEx</td>
</tr>
</tbody>
</table>

Continue to next page…
<table>
<thead>
<tr>
<th>Heading</th>
<th>Note Type</th>
<th>Key Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past Lab Hx</td>
<td>ACOG</td>
<td>KCT_PastLabHx</td>
</tr>
<tr>
<td>Past Pregnancy Hx</td>
<td>ACOG</td>
<td>KCT_PastPregHx</td>
</tr>
<tr>
<td>Performed By</td>
<td>Procedure</td>
<td></td>
</tr>
<tr>
<td>Procedure</td>
<td>Procedure</td>
<td></td>
</tr>
<tr>
<td>Psych Impression</td>
<td>Psych/Therapist Initial Visit and Psych/Therapist Progress Note</td>
<td>KCT_PsychImp</td>
</tr>
<tr>
<td>Psych Intervention</td>
<td>Psych/Therapist Progress Note</td>
<td>KCT_PSYINT</td>
</tr>
<tr>
<td>Psych Symptom/Follow Up</td>
<td>Psych/Therapist Progress Note</td>
<td>KCT_PSYSYFU</td>
</tr>
<tr>
<td>Psych Syndromes</td>
<td>Psych/Therapist Progress Note</td>
<td>Subjective</td>
</tr>
<tr>
<td>PsychFHx</td>
<td>Psych/Therapist Initial Visit</td>
<td>KCT_PsychFHx</td>
</tr>
<tr>
<td>PsychHx</td>
<td>Psych/Therapist Initial Visit</td>
<td>KCT_PsychHx</td>
</tr>
<tr>
<td>PsychSHx</td>
<td>Psych/Therapist Initial Visit</td>
<td>KCT_PsychSHx</td>
</tr>
</tbody>
</table>

Continue to next page…
<table>
<thead>
<tr>
<th>Heading</th>
<th>Note Type</th>
<th>Key Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason for Referral</td>
<td>Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary</td>
<td>KCT_REASON</td>
</tr>
<tr>
<td>Tests</td>
<td>Psych/Therapist Initial Visit</td>
<td>KCT_Tests</td>
</tr>
<tr>
<td>Tests and Measures</td>
<td>Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary</td>
<td>KCT_Cognitive/Functional_TEST</td>
</tr>
<tr>
<td>Treatment</td>
<td>Physical Therapy Initial Evaluation, Interim, Progress and Discharge Summary</td>
<td>KCT_Cognitive/Functional_TREAT</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Section/Care Plan</th>
<th>Menu 1</th>
<th>Menu</th>
<th>Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy</td>
<td>Paste</td>
<td>Copy</td>
<td>Paste</td>
</tr>
<tr>
<td>exam.GEN.focus</td>
<td>Reason for visit</td>
<td>new onset symptom evaluation</td>
<td></td>
</tr>
<tr>
<td>exam.GEN.detail</td>
<td>Onset/Time course</td>
<td>initial evaluation</td>
<td></td>
</tr>
<tr>
<td>exam.GEN.comp</td>
<td>Symptoms</td>
<td>follow-up evaluation of hypot...</td>
<td></td>
</tr>
<tr>
<td>Subjective</td>
<td>Pertinent positives/negatives</td>
<td>ongoing management of hypo...</td>
<td></td>
</tr>
<tr>
<td>careplan #</td>
<td>Exacerbating/Alliaviing factors</td>
<td>Visit reason (describe)</td>
<td></td>
</tr>
<tr>
<td>Add</td>
<td>Edit</td>
<td>Add</td>
<td>Edit</td>
</tr>
<tr>
<td>Edit</td>
<td>Del</td>
<td>Edit</td>
<td>Del</td>
</tr>
<tr>
<td>Del</td>
<td></td>
<td>Del</td>
<td></td>
</tr>
</tbody>
</table>

**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.

**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.”

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.

Template Editor View

Text in the Note View

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.

Menu 2 (Single Select)
Ability to select one answer in the next menu.
Ability to select either a positive or negative answer for the current menu.

None

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

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

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.

<table>
<thead>
<tr>
<th>Conjunction Type</th>
<th>Example using “brown” as the conjunction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepend</td>
<td>Before: brown dog</td>
</tr>
<tr>
<td>Append</td>
<td>After: dog brown</td>
</tr>
<tr>
<td>Replace</td>
<td>Replace: brown</td>
</tr>
<tr>
<td>When using {xxx}</td>
<td>{xxx} will override the conjunction command. For example: “The {xxx} dog ran down the street.” will be “The brown dog ran down the street.”</td>
</tr>
</tbody>
</table>
Prepend

Template Editor View

Note View
Append

Template Editor View

Note View

Subjective

Treatment effects: reasons for nonadherence include stomach upset.
Replace

Template Editor View

Note View

Risk factors include: COPD, DM
{xxx} with Conjunctions

Template Editor View

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Function</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>{xxx}</td>
<td>Placeholder for the template to insert the next menu’s text.</td>
<td><img src="image1" alt="Template Editor View" /></td>
</tr>
<tr>
<td></td>
<td></td>
<td><img src="image2" alt="Note View" /></td>
</tr>
<tr>
<td>{cr}{cr}</td>
<td>Double space (double carriage return) or click the Enter key 2 times.</td>
<td><img src="image3" alt="Template Editor View" /></td>
</tr>
<tr>
<td>Code</td>
<td>Function</td>
<td>Example</td>
</tr>
<tr>
<td>------</td>
<td>----------</td>
<td>---------</td>
</tr>
</tbody>
</table>
| {cr} | Single space (single carriage return) or click the Enter key 1 time. | ![Template Editor View](image1)  
  **Subjective**  
  Patient presents for evaluation of new onset symptoms.  
  Sputum is clear.  
  ![Note View](image2)  
  **Subjective**  
  Patient presents for evaluation of new onset symptoms.  
  Patient reports the presence/absence of the following issues related to the current visit: (.)
<table>
<thead>
<tr>
<th>Code</th>
<th>Function</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ore bar. Continues to the next Menu 1 item.</td>
<td>Template Editor View <img src="image1.png" alt="Menu 1" /></td>
</tr>
<tr>
<td>{tb}</td>
<td>Indent (5 spaces)</td>
<td>Template Editor View <img src="image2.png" alt="Menu 1 Macro Text" /> See next page for “Note View”</td>
</tr>
<tr>
<td>Code</td>
<td>Function</td>
<td>Example</td>
</tr>
<tr>
<td>------</td>
<td>----------</td>
<td>---------</td>
</tr>
</tbody>
</table>

### Note View

Subjective

Patient presents for evaluation of new onset symptoms. Patient reports the presence/absence of the following hx/sx related...
**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

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

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 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.
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.

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.
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.

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

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**.

<table>
<thead>
<tr>
<th>Medication Order Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>eRx (e prescription)</td>
<td>Adds eRx order*</td>
</tr>
<tr>
<td></td>
<td>Adds medication to plan section of the note</td>
</tr>
<tr>
<td>Hx</td>
<td>Adds medication to medication list*</td>
</tr>
<tr>
<td></td>
<td>Adds medication to plan section of the note</td>
</tr>
<tr>
<td>Note only</td>
<td>Adds medication to plan section of the note only</td>
</tr>
</tbody>
</table>

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