

Template Admin

Copyright © 2023, Tabula Rasa HealthCare, Inc., All Rights Reserved. These materials are confidential and proprietary information of Tabula Rasa HealthCare, Inc. and may not be reproduced in whole or in part without the written consent of Tabula Rasa HealthCare, Inc. | NASDAQ – TRHC.



Agenda

Logging in as the Template User

Modifying Current Templates

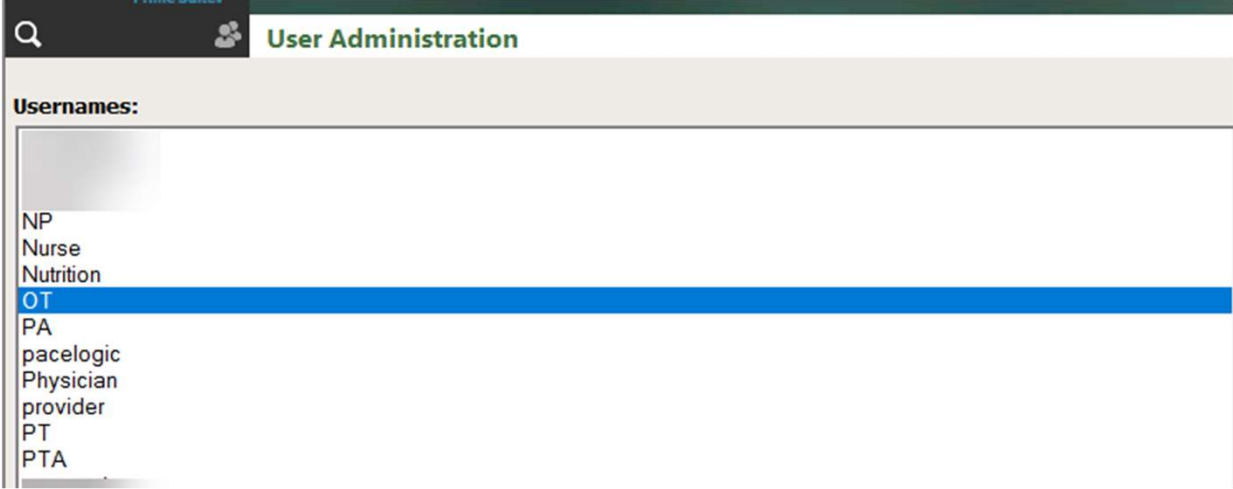
Creating Folders & Moving Templates

Creating New Templates

Logging in as the Template User

Logging in as the Template User

1) Find the correct username



Logging in as the Template User

2) Log out of your username

3) Type in the template username and password

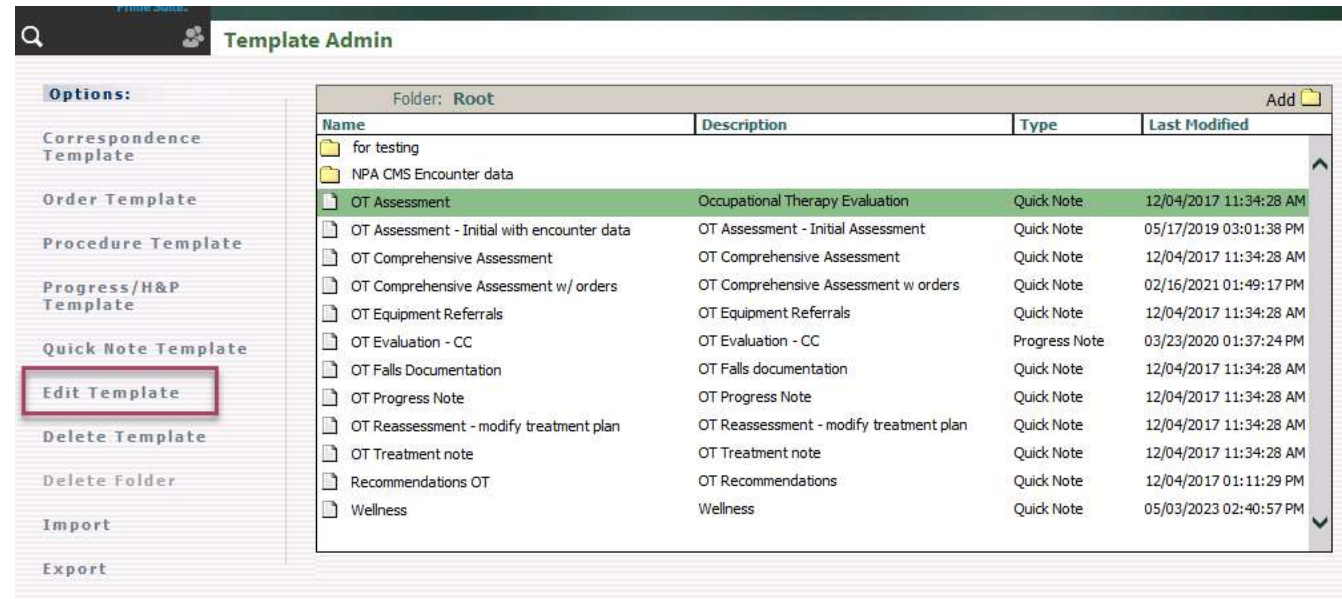
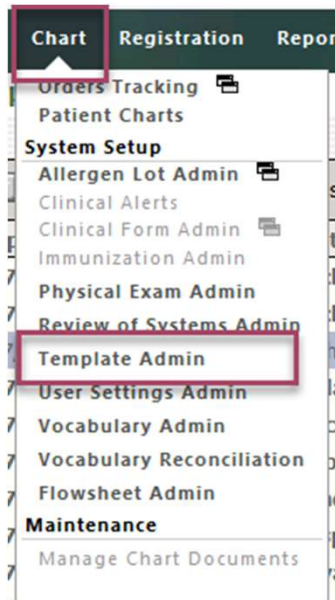


OT

Modifying Current Templates

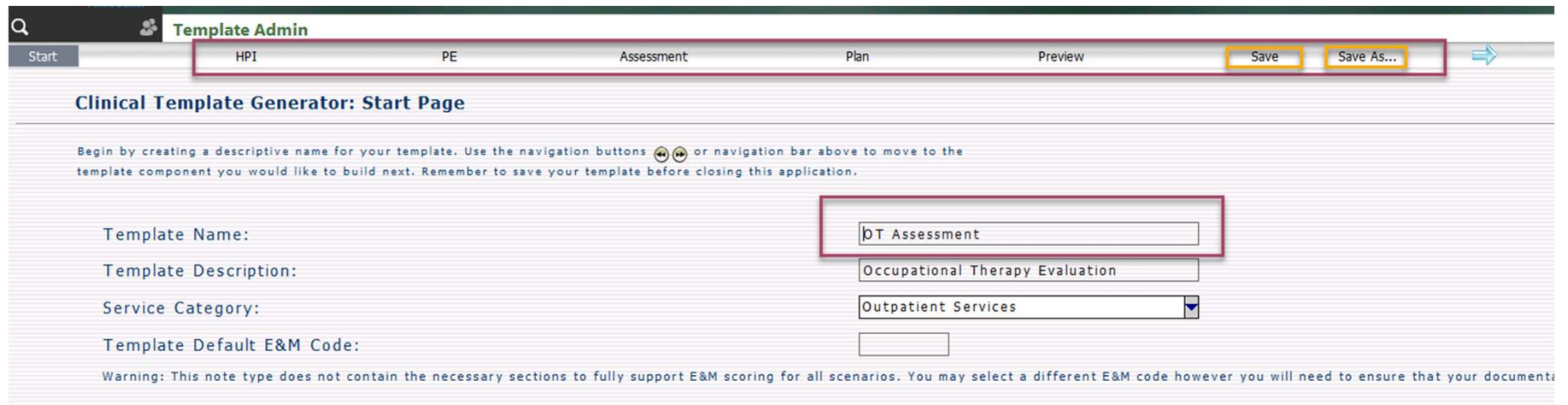
Modifying Current Templates

- 1) Log into the correct template username
- 2) Chart > Template Admin
- 3) Select the template you want to modify and click “Edit Template”



Modifying Current Templates

- 4) Modify the template name if needed
- 5) Move along sections of the note making changes
- 6) “Save” to overwrite current template or “Save As” to create a copy with your changes

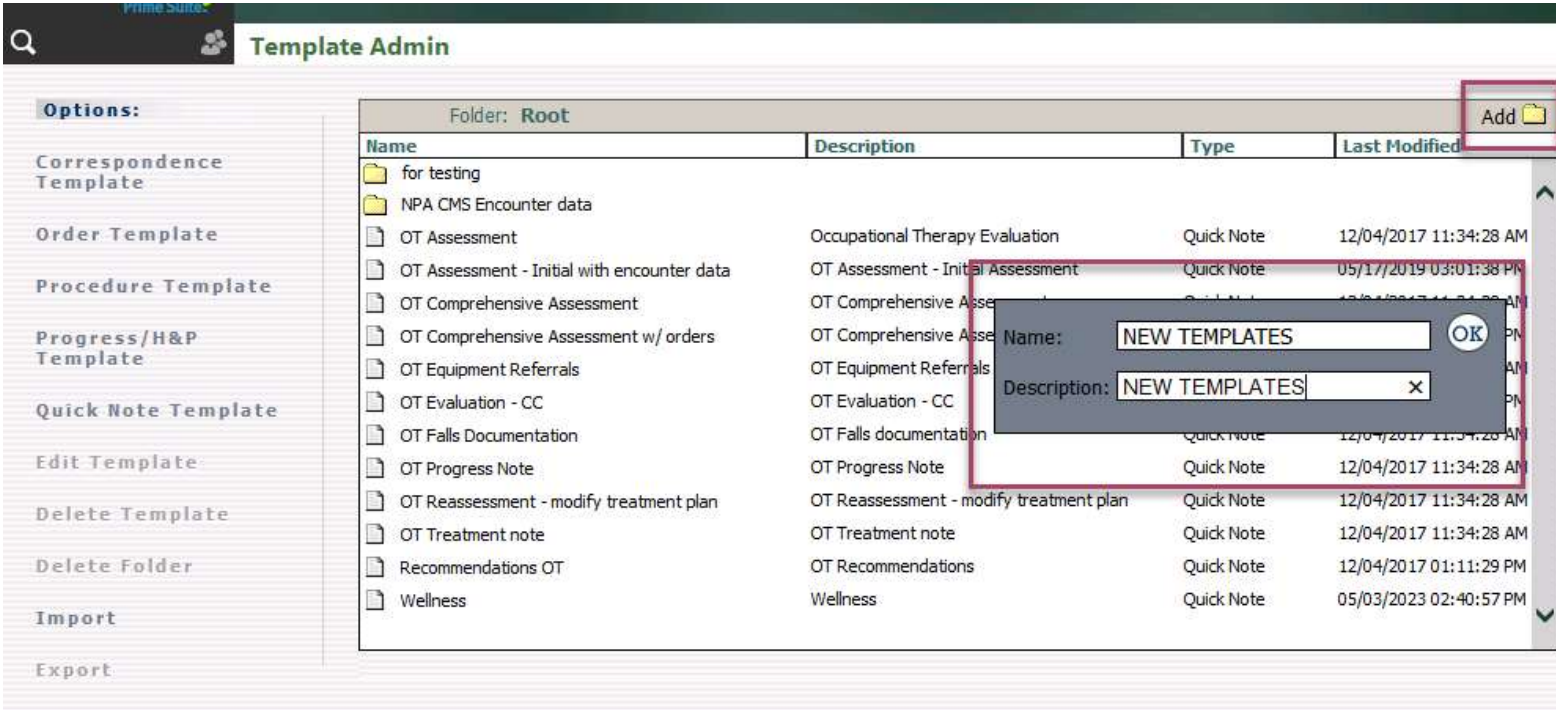


The screenshot displays the 'Clinical Template Generator: Start Page' interface. At the top, there is a navigation bar with tabs for 'Start', 'HPI', 'PE', 'Assessment', 'Plan', and 'Preview'. The 'Assessment' tab is currently selected. To the right of the navigation bar are two buttons: 'Save' and 'Save As...'. Below the navigation bar, the page title is 'Clinical Template Generator: Start Page'. A paragraph of instructions reads: 'Begin by creating a descriptive name for your template. Use the navigation buttons or navigation bar above to move to the template component you would like to build next. Remember to save your template before closing this application.' Below this text are four form fields: 'Template Name:' with the value 'OT Assessment', 'Template Description:' with the value 'Occupational Therapy Evaluation', 'Service Category:' with a dropdown menu set to 'Outpatient Services', and 'Template Default E&M Code:' with an empty text box. A warning message at the bottom states: 'Warning: This note type does not contain the necessary sections to fully support E&M scoring for all scenarios. You may select a different E&M code however you will need to ensure that your documents'.

Creating Folders and Moving Templates

Creating Folders

- 1) Log into the correct template username
- 2) Select “Add” and type in the name of the folder



The screenshot shows the 'Template Admin' interface. On the left is a sidebar with 'Options:' and a list of template types: Correspondence Template, Order Template, Procedure Template, Progress/H&P Template, Quick Note Template, Edit Template, Delete Template, Delete Folder, Import, and Export. The main area displays a table of templates under the heading 'Folder: Root'. An 'Add' button is in the top right corner. A modal dialog is open over the table, with 'Name:' and 'Description:' fields both containing 'NEW TEMPLATES'. An 'OK' button is visible in the dialog.

Name	Description	Type	Last Modified
for testing			
NPA CMS Encounter data			
OT Assessment	Occupational Therapy Evaluation	Quick Note	12/04/2017 11:34:28 AM
OT Assessment - Initial with encounter data	OT Assessment - Initial Assessment	Quick Note	05/17/2019 03:01:38 PM
OT Comprehensive Assessment	OT Comprehensive Assessment	Quick Note	12/04/2017 11:34:28 AM
OT Comprehensive Assessment w/ orders	OT Comprehensive Assessment	Quick Note	12/04/2017 11:34:28 AM
OT Equipment Referrals	OT Equipment Referrals	Quick Note	12/04/2017 11:34:28 AM
OT Evaluation - CC	OT Evaluation - CC	Quick Note	12/04/2017 11:34:28 AM
OT Falls Documentation	OT Falls documentation	Quick Note	12/04/2017 11:34:28 AM
OT Progress Note	OT Progress Note	Quick Note	12/04/2017 11:34:28 AM
OT Reassessment - modify treatment plan	OT Reassessment - modify treatment plan	Quick Note	12/04/2017 11:34:28 AM
OT Treatment note	OT Treatment note	Quick Note	12/04/2017 11:34:28 AM
Recommendations OT	OT Recommendations	Quick Note	12/04/2017 01:11:29 PM
Wellness	Wellness	Quick Note	05/03/2023 02:40:57 PM

Moving Template into a Folder

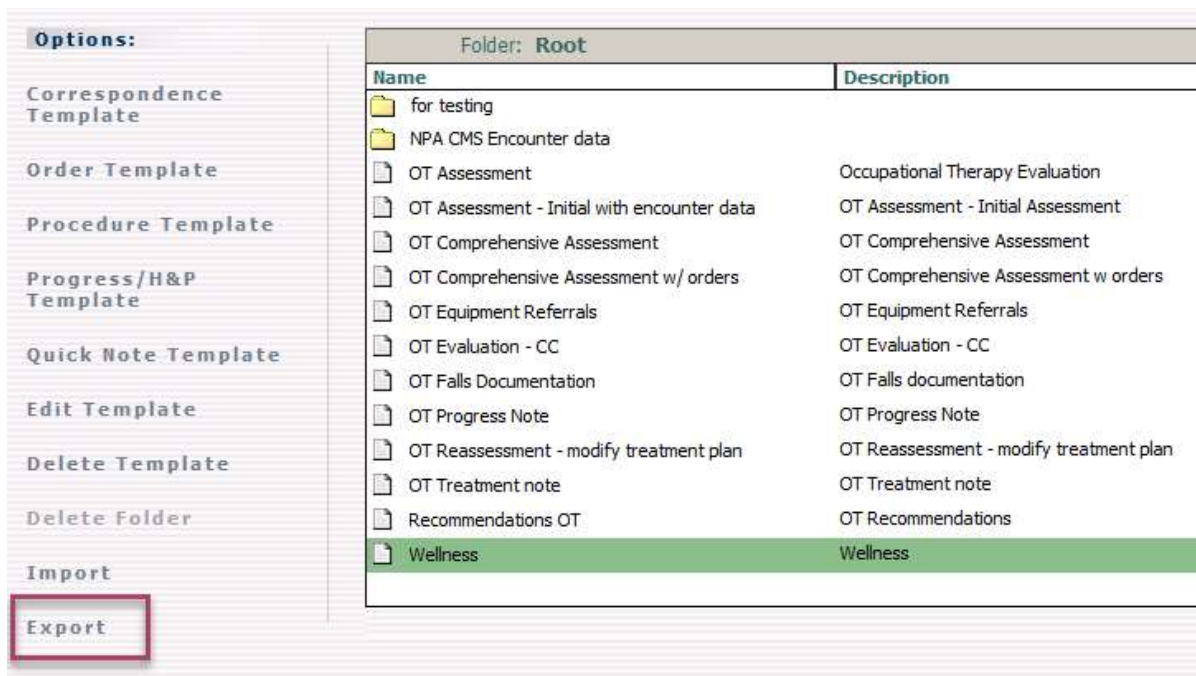
- 1) Right click on the template you want to move and select “Move Template”
- 2) Right click on the folder you wish to move it to and select “Place Template In This Folder”

Folder: Root	
Name	Description
for testing	
NPA CMS Encounter data	
NEW TEMPLATES	NEW TEMPLATES
OT Assessment	Occupational Therapy Evaluation
OT Assessment	OT Assessment - Initial Assessment
OT Comprehensive	OT Comprehensive Assessment
OT Comprehensive Assessment w/ orders	OT Comprehensive Assessment w orders
OT Equipment Referrals	OT Equipment Referrals

Folder: Root	
Name	Description
for testing	
NPA CMS Encounter data	
NEW TEMPLATES	NEW TEMPLATES
OT Assessment	Occupational Therapy Evaluation
OT Assessment	OT Assessment - Initial Assessment
OT Comprehensive	OT Comprehensive Assessment
OT Comprehensive	OT Comprehensive Assessment w orders
OT Equipment Referrals	OT Equipment Referrals
OT Evaluation - CC	OT Evaluation - CC

Moving Templates to Another Template User

1) Select the template you wish to move and click “Export”

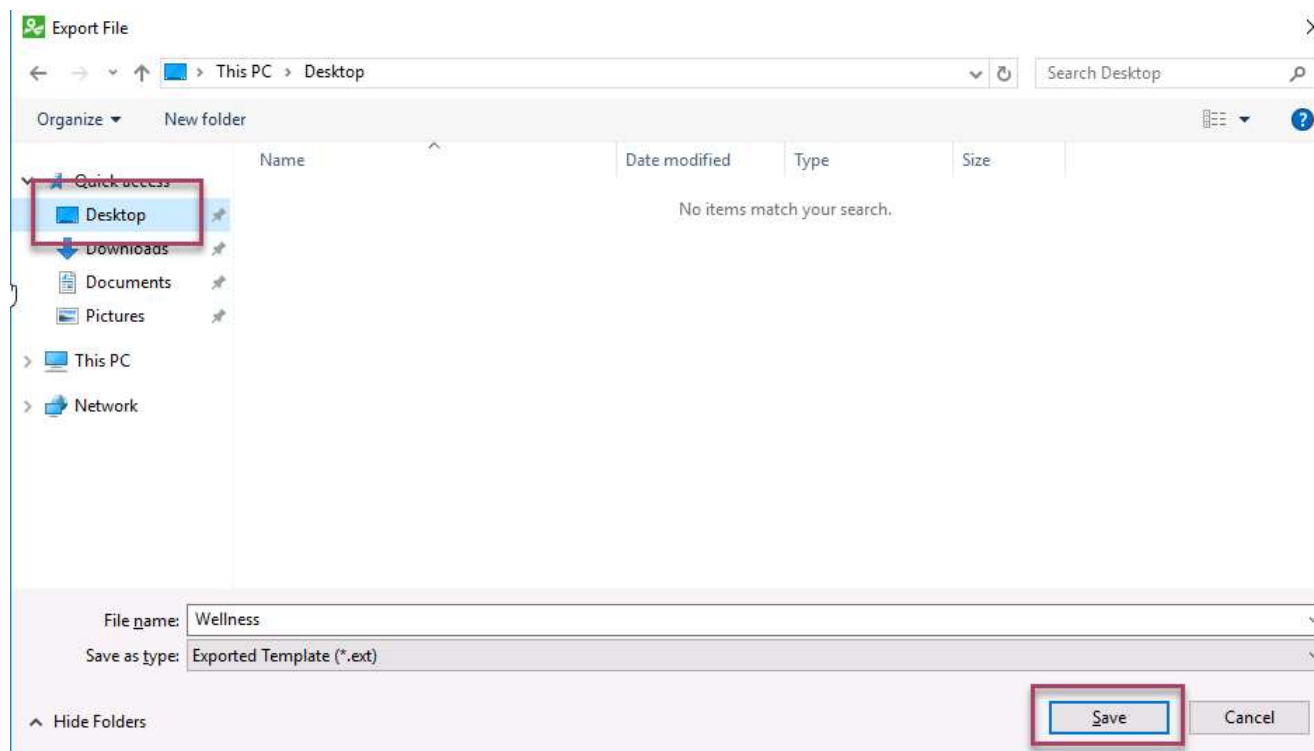


The screenshot shows a software interface with a left-hand menu and a main content area. The left-hand menu is titled "Options:" and contains the following items: Correspondence Template, Order Template, Procedure Template, Progress/H&P Template, Quick Note Template, Edit Template, Delete Template, Delete Folder, Import, and Export. The "Export" button is highlighted with a red rectangular box. The main content area is titled "Folder: Root" and contains a table with two columns: "Name" and "Description". The table lists various templates, with the "Wellness" template highlighted in green.

Folder: Root	
Name	Description
for testing	
NPA CMS Encounter data	
OT Assessment	Occupational Therapy Evaluation
OT Assessment - Initial with encounter data	OT Assessment - Initial Assessment
OT Comprehensive Assessment	OT Comprehensive Assessment
OT Comprehensive Assessment w/ orders	OT Comprehensive Assessment w orders
OT Equipment Referrals	OT Equipment Referrals
OT Evaluation - CC	OT Evaluation - CC
OT Falls Documentation	OT Falls documentation
OT Progress Note	OT Progress Note
OT Reassessment - modify treatment plan	OT Reassessment - modify treatment plan
OT Treatment note	OT Treatment note
Recommendations OT	OT Recommendations
Wellness	Wellness

Moving Templates to Another Template User

2) Select where on the cloud you want it to be stored and click “Save”



Moving Templates to Another Template User

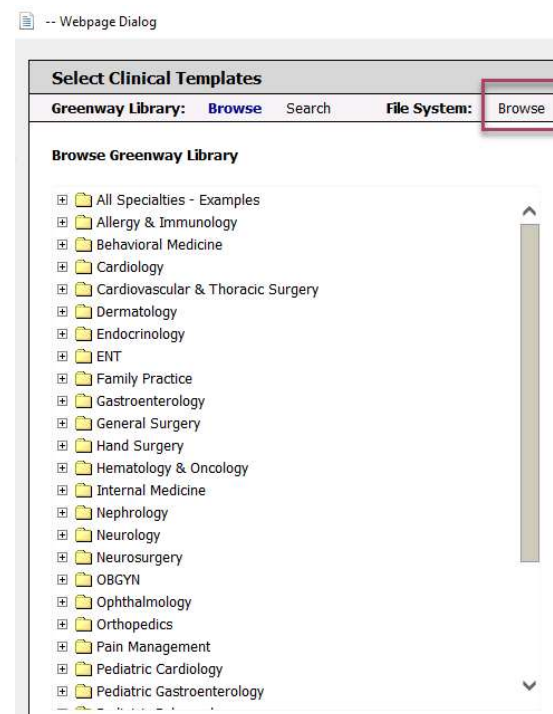
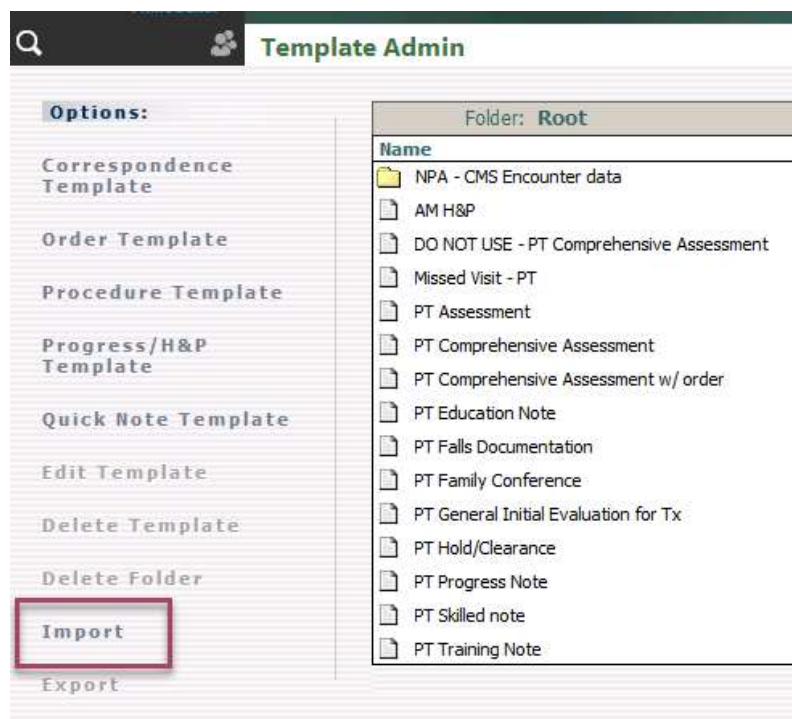
3) Logout and login as the template user you wish to import the template to



Moving Templates to Another Template User

4) Once logged into the correct user go back to Chart > Template Admin

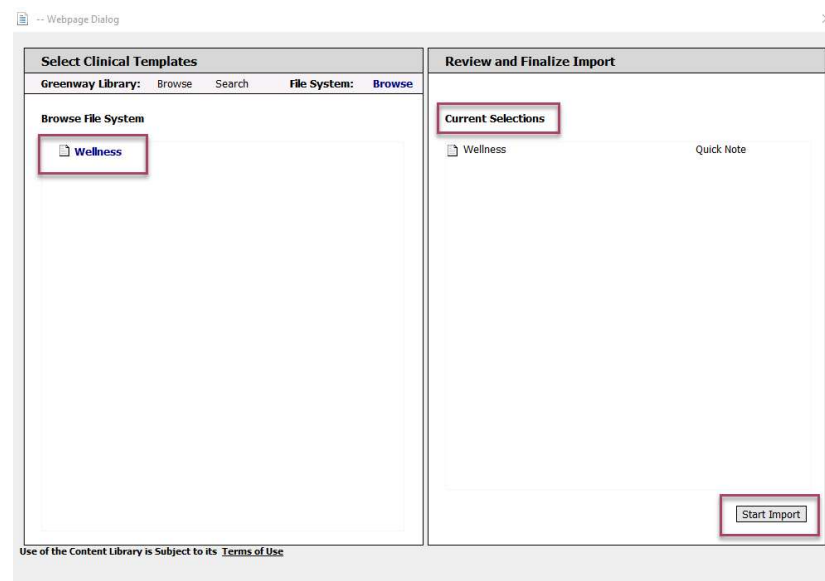
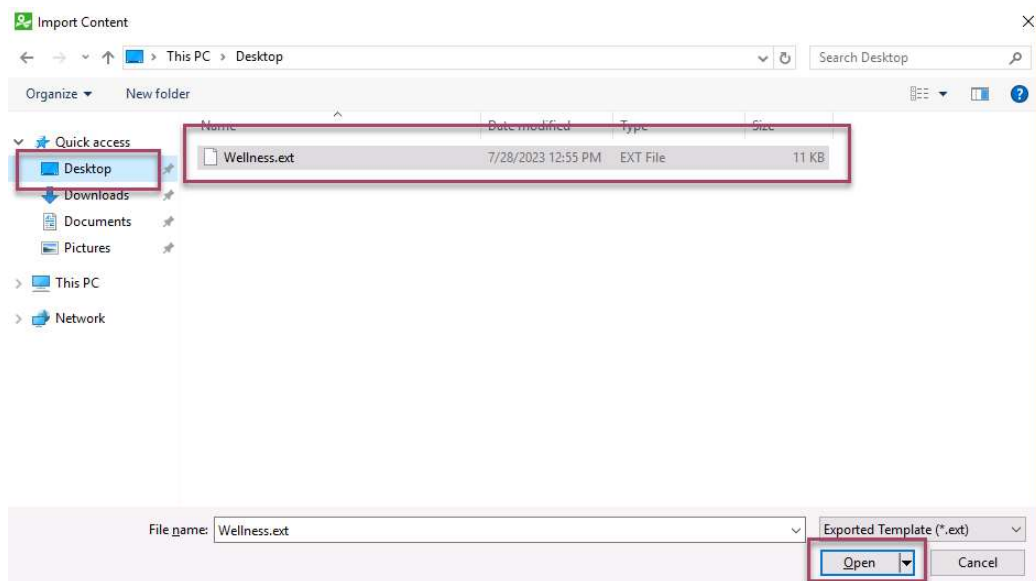
5) Select “Import” and “Browse” next to “File System” on the next pop-up screen



Moving Templates to Another Template User

6) Select the template you saved on the cloud and click on “Open”

7) The template will show. Click on the template for it to be under “Current Selections” and click, “Start Import”



Moving Templates to Another Template User

8) The template will be present in the different template user for use

Options:

- Correspondence Template
- Order Template
- Procedure Template
- Progress/H&P Template
- Quick Note Template
- Edit Template
- Delete Template
- Delete Folder
- Import
- Export

Folder: Root		
Name	Description	Type
Missed Visit - PT	Missed Visit - PT	Quick Note
PT Assessment	Final 071612	Quick Note
PT Comprehensive Assessment	PT Comprehensive Assessment	Quick Note
PT Comprehensive Assessment w/ order	PT Comprehensive Assessment w/ order	Quick Note
PT Education Note	PT Education Note	Quick Note
PT Falls Documentation	PT Falls Documentation	Quick Note
PT Family Conference	PT Family Conference	Quick Note
PT General Initial Evaluation for Tx	PT General Initial Evaluation for Tx	Quick Note
PT Hold/Clearance	PT Hold/Clearance	Quick Note
PT Progress Note	PT Progress Note	Quick Note
PT Skilled note	PT Skilled note	Quick Note
PT Training Note	PT Training Note	Quick Note
Recommendations PT	PT Recommendations	Quick Note
Restorative	Restorative	Quick Note
Wellness	Wellness	Quick Note

Creating New Templates

Creating New Templates





Q&A



Thank You

