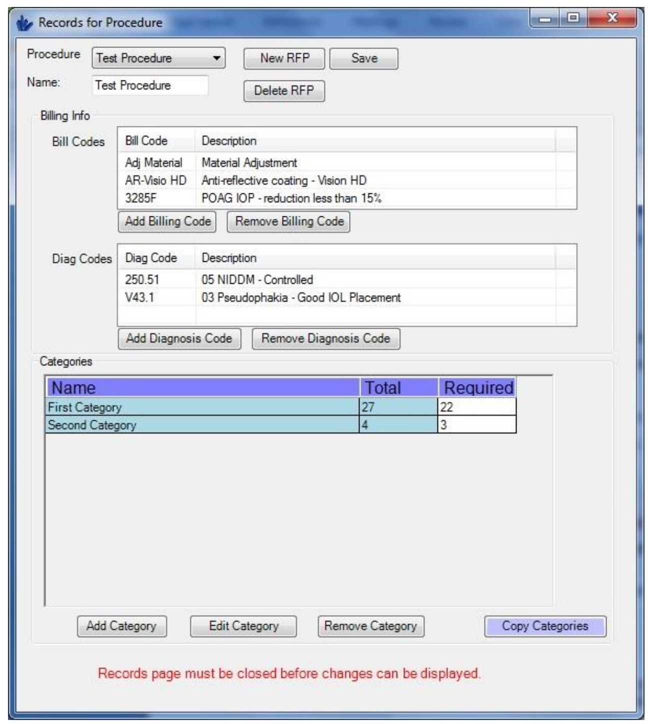
8.10.2 Creating and Editing *Records for Procedure* Templates

To edit the Records for Procedure templates select *EHR Settings – Page Options - Edit Records for Procedure* from the Records tab.

To create and edit a Procedure:

1. Select the **Procedure** you wish to edit from the menu, or to create a new procedure, click the **New RFP** button.
2. Enter or change the **Name**, as desired.
3. Use the **Add Billing Code**, **Remove Billing Code**, **Add Diagnosis Code** and **Remove Diagnosis Code** buttons to add/remove billing/diagnosis codes to the procedure. This will automatically add the selected billing/diagnosis codes to the Routing Slip when generated.



Records for Procedure Editor

4. Click **Add Category** to create a new category, or **Edit Category** to edit existing categories.

   Categories are used to organize the information you need to collect. If, for example, you need to collect information for History of Present Illness, Family History, etc., different categories could be used that don't necessarily have to line up with the pages in the medical record.

   ♦ The Category Editor will open.
5. In the Category Editor, specify the **Category Name**.
6. Select the medical record page containing the field(s) you wish to add to the category, and select the checkbox(es) under **Include within Category** for the corresponding field in order to include it in the category.
7. Once all desired categories have been added, click the **Save Category** button.

   ♦ The Category Editor will close, and the updated category will appear in the **Categories** list.
8. If you only need to report on a certain percentage of fields within the category, click on the number in the **Required** column and change it to the desired number.

   At any time, click **Remove Category** to delete the selected category, or **Delete RFP** to delete the entire procedure.
9. When finished creating/editing the Procedure, click the **Save RFP** button.