Adding Clinical Codes to Forms

07/24/2024 12:04 pm EDT

You can connect clinical codes (ICD-10, CPT, HCPCS, and custom codes) to form/template fields so they populate billing information while completing your clinical note. You can add codes to the following fields:

- Yes/No
- Switch
- Single Select and Multiple Select

1. Go to **Clinical** > **Form Builder**.

2. Select the form you would like to use from the Form List and add the desired fields from the Form Tools.

Form Builder				Legend:	🖋 Edit	🕂 Move	𝗞 Copy to clipboard	X Archive
Form List	+	Billing Codes t	o Forms Sample 🖋			Form To	pols	
Presets Additional		New Yes / No	New Switch			New Fi	elds Field Clipboar	rd 1
Billing Codes to Forms Sample	×	YES NO	ON				New Section SOAP	Section
Surgery: Pre-Op Note	×	Single Select Codes	Codes					
Trigger Point Injection Form	×	Single Select	Multiple Select	•		Short	Text Field	
Lumbar Facet Joint Injections	×					Yes / I	No	YN
CERVICAL SPINE ASSESSMENT	×					Switch	n	ONO
Consent Practice Demo	×				н.	Single	Select	
Consent Free Draw 2	×				н.	Multip	le Select	
Physical Exam Multiple Select	×				н.	Free D	Draw	MM
Trigger Point Injection Form	×				н.	Fractio	on Field	0/0
Encoderant Decoding				_		Heade	er	
Share		Options -	& Save	e as Save	•	Subhe	ader	
Library Email f Facebook 9 T	witter							

3. Underneath the **Generated Text** area, there will be a **Clinical Codes** section. Click **+Add New** to choose the type of code you want to add.

	Gener	rated	text								
Edit	🚯 Valu	e 🌡 P	atient	🛗 Date	0 D	ate & Time	🛗 Fi	eld Date	O Field Date	& Time	
Preview	Heade	r Subl	neader	Bold	Italic	Underline	e x ₂	X ²			
	Pt Dem	nogr 🕶	Servi	ce 🕶 🛛 🛛	Date & [·]	Time 🔻 🗌	System	Vitals -	Custom Vita	ıls 🕶	Custom Pt Demogr -
Billing Pr	rofile	(None)	•								ICD-10 CPT HCPCS Custom
Clinical co	odes	Code Sy	stem			Code	De	scriptio	า	Opti	Oustonn
											+ Add New 🔺

4. Once the code type is selected, you can search for the code by keyword or number or by entering the code directly into the field.

Search]	▼
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Adding Codes to Yes / No Fields

With Yes / No fields, you can add codes to populate when Yes or No is chosen.

1. After selecting the codes you would like to use, you can tie them to either Yes or No under the Option column.

2. When finished click **Update Field** to save your changes.

Edit Field	Pt De	moar 🔻	Service	•▼ □	ate & Time 🕶	Syster	m Vit:	als 🔻	Custom Vitals -	Custom	Pt Demogr 🔻	
		Pt Demogr Service Date & Time System Vitals Custom Vitals Custom Pt Demogr Physical Exam Normal										
	Affirn	native ı	no ger	nerate	ed text							
Edit	Val	ue 🛔 Pa	atient	🛗 Date	O Date & T	ime 🛗 I	Field	Date	② Field Date & Tim	ie		
Preview	Heade	er Subh	eader	Bold	Italic Unde	rline x2	X ²					
	Pt Der	mogr 🕶	Service	•• [[ate & Time 🕶	Syster	m Vita	als 🕶	Custom Vitals -	Custom I	Pt Demogr 🕶	
	g Profile	(None)										
Clinica	al codes	-	ode System Code Description Option									
		ICD-10		Z00.0	0 Encounter adult medi examination abnormal	cal on without		Yes		~	 Remove 	
		CPT		99213	B OFFICE/O VISIT EST	UTPATIEN	١T	Yes		~	× Remove	
		ICD-10		Z00.0	adult medi examinatio	Encounter for general adult medical examination with abnormal findings		No		~	X Remove	
		CPT		99213	B OFFICE/O VISIT EST	UTPATIEN	ΝT	No		~	× Remove	
											+ Add New +	
											✓ Update field	

3. Codes associated with either the yes or no option within a specific form will also appear in the billing section of the form.

Adding Codes to Switches

With a switch, you can tie multiple codes that will populate when the switch is activated in the note.

1. Once you click +Add New, you can select the code type and use the search field to find the desired code. Repeat for all the codes you would like to be under the switch.

Label Name													
	□ Required field												
Spacing within note	□ New Line	New Paragra	ph ⊡Sm	nart Field									
Default value	OFF												
Ger	nerated text												
Edit 🕑 V	alue 🎍 Patient	🛗 Date 🗿 Da	ate & Time	🛗 Field Date	O Field Date & Tim	ne							
Preview	ader Subheader	Bold Italic	Underline	X ₂ X ²									
Pt [Demogr 🔻 Servic	e ▼ Date &	Time 🔻 🛛 S	System Vitals 🔻	Custom Vitals -	Custom Pt Demogr 🔻							
You	can fill out the tex	t here if you w	ould like it	to populate on	the note.		1,						
Billing Profile	(None) -												
Clinical codes	Code System	Code	Des	scription									
	ICD-10	Search				× Remove							
						+ Add Nev	v 🔺						

2. Click **Update Field** when you have added all the codes you need.

Label Name	Strep	Strep Try to keep it short!										
	Required field											
Spacing within note	e 🗆 New Line 🗌	New Para	graph 🗌 Smar	t Field								
Default value	OFF											
Ge	enerated text											
Edit	Value & Patient	🛗 Date 🤤	Date & Time	Field Date	O Field Date & 1	Гime						
Preview	eader Subheader	Bold Ital	ic Underline x	x ₂ x ²								
	t Demogr 🕶 🛛 Service	e 🕶 🗌 Date	& Time ▼ Syst	em Vitals 🔻	Custom Vitals	Custom Pt	t Demogr 🔻					
Billing Profile	e (None) -											
Clinical codes	Code System	Code	Description									
	ICD-10	J03.01	Acute recurrent st	reptococcal to	onsillitis	× Remove						
	CPT	3210F	GRP A STREP TE	ST PERFORM	IED	× Remove						
	CPT	99213	OFFICE/OUTPATIE	ENT VISIT EST	Г	× Remove						
							+ Add New -					
						@ Canad	✓ Update field					

3. Once activated, the switch will populate the codes in the billing section. If the switch is deactivated, the codes will be removed from the billing.

Adding Codes to Single and Multiple Select Fields

The process for adding clinical codes to **Single Select** and **Multiple Select** fields is the same.

With a single select field, you can choose one code from the list you create. Whereas with a multiple-select field, you can choose more than one code from the list you create.

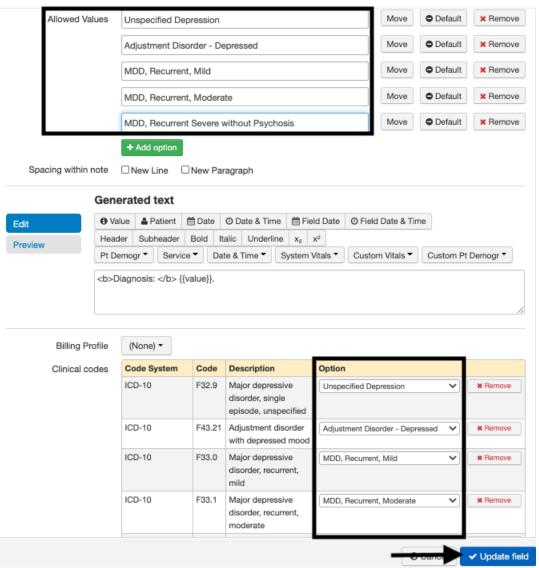
1. After adding the **Allowed Values** and your codes in the **Clinical Codes** section, you can connect the values and codes by selecting the relevant value from the **Options** dropdown.

2. Click Update Field when finished.

Single Select

Label Na	ame	Sleep Disorder	r		Try to kee	p it short!			
	(Required fiel	d						
Allowed Val		Insomnia					Move	O Default	× Remove
	[Circadian Slee	p Rhythm D		Move	O Default	× Remove		
	[Narcolepsy wit	thout Catapl		Move	O Default	× Remove		
	[Narcolepsy wit	th Cataplexy	,			Move	O Default	× Remove
Spacing within n			□New Para	graph					
		rated text							
Edit	Valu		-		Field Date	e Ø Field	Date & Tir	me	
Preview	Heade Dt Dor	ter Subheader Bold Italic Underline x₂ x² emogr ▼ Service ▼ Date & Time ▼ System Vitals ▼ Custom Vitals ▼ Custom Pt						Domogr	
Billing Pro	ofile	(None) -							
Clinical co	des	Code System	Code	Description	Opti	on			
		ICD-10 G47.00 ICD-10 G47.20		Insomnia, unspecified	Inso	omnia		~	X Remove
				Circadian rhyth sleep disorder, unspecified typ	_	adian Sleep	sorder 🗸	× Remove	
		ICD-10 G47.419		Narcolepsy without Insomnia Circadian S				× Remove	
		ICD-10	G47.411	G47.411 Narcolepsy with cataplexy			without Cataplexy with Cataplexy		X Remove
									+ Add New +
							_	Canad	 Update field

Multiple Select



Codes populated by the **Single Select** option and the **Multiple Select** options of a specific form will also appear in the billing section form.

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