Adding Clinical Codes to Forms

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Before building your form, we recommend reviewing Best Practices for Building Custom Forms designed to help you make the most of the clinical notes feature.

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	Copy to clipboard	X Archive
Form List	+	Billing Code	es to Forms Sample 🖋			Form To	ools	
Presets Additional Billing Codes to Forms Sample Surgery: Pre-Op Note	×	Yes / No	New Switch			New Fie	elds Field Clipboar	_
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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.

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											ICD-10 CPT
Billi	ng Profile	(None)) -								

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.

CPT	Search	~	× Remove

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.

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Clinic		Code System	Z00.0	Description	r gener	_		*	× Remove
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	(CPT	99213	OFFICE/OUT VISIT EST	PATIEN	T Yes	S	~	× Remove
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									T Add Now -

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.

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Edit Field

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	You c	an fill out t	he text	here if	f you w	ould like	it to po	pulate on	the note.		12	
Billing Pr	rofile	(None) -										
Clinical co	odes	Code Syst	em	Code		C	escripti	on				
		ICD-10		Searc	h					× Remove		
											+ Add New ▲	

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

Edit Field

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Default value	OFF										
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	Demogr 🔻 Service	e▼ Date	e & Time ▼ System Vitals ▼ Custom Vitals ▼ Custom Pt Demogr ▼								
Billing Profile	(None) -										
Clinical codes	Code System	Code	Description								
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	CPT	3210F	GRP A STREP TEST PERFORMED Remove								
	CPT	99213	OFFICE/OUTPATIENT VISIT EST								
			+ Add New 🔺								

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

Edit Field

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	[Circadian Slee	p Rhythm D		Move	O Default	× Remove		
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		ICD-10 G47.419		Narcolepsy without Insomnia Circadian			Rhythm I hout Catap		× Remove
		ICD-10	G47.411	Narcolepsy with cataplexy		rcolepsy with			X Remove
									+ Add New +
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Multiple Select

Edit Field



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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