



**CureMD UC'24**  
Raleigh, North Carolina  
**Connecting Cure Communities**



Crafting Clinical  
Excellence:  
Building PE/ROS  
Like a Pro



**Scan QR Code  
for Session  
Attendance**





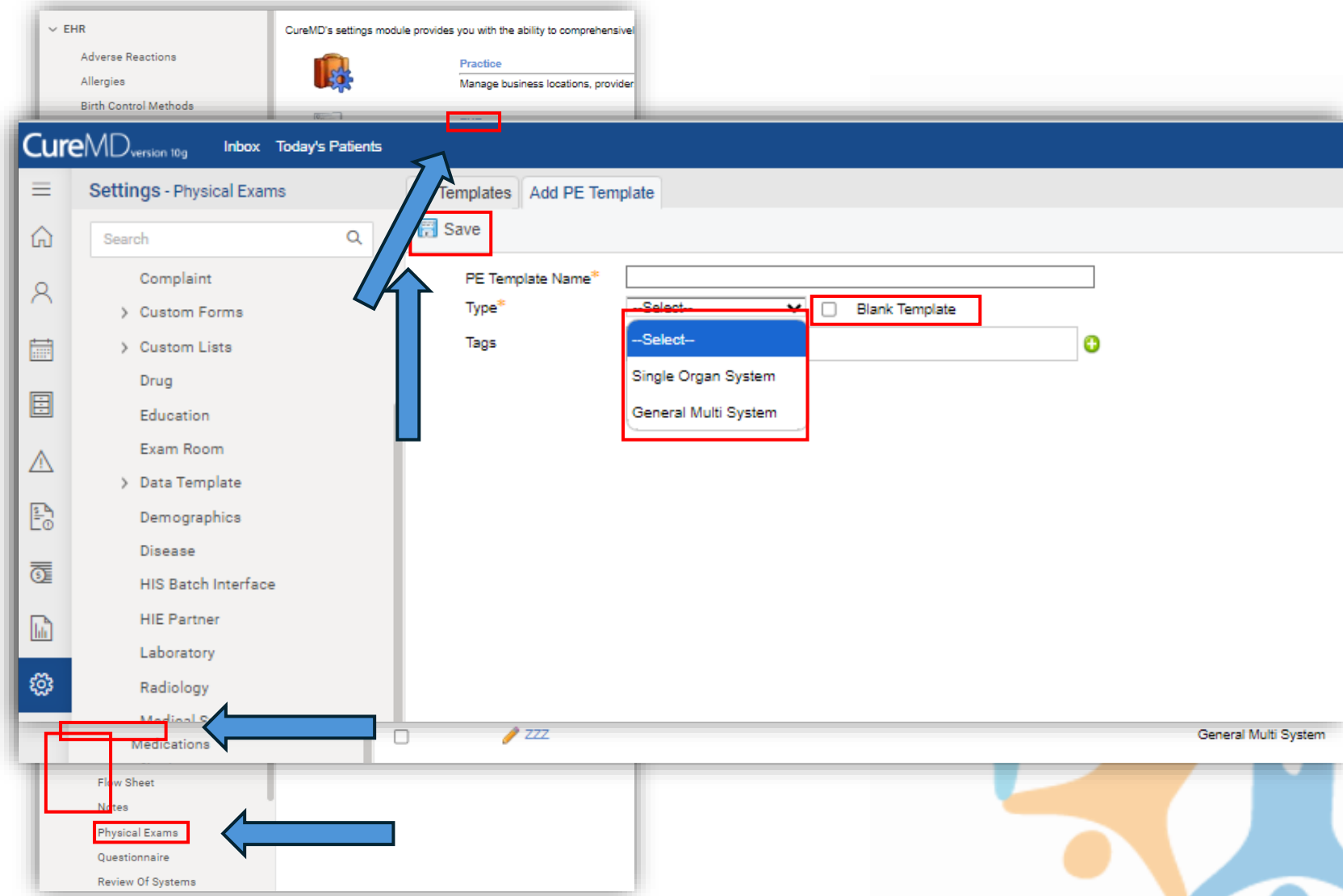
# Agenda

1. Building physical exam and review of systems templates.
2. Creating data templates to pair with physical exam and review of systems templates.
3. How to associate your physical exam and/or review of systems template with a provider note template.




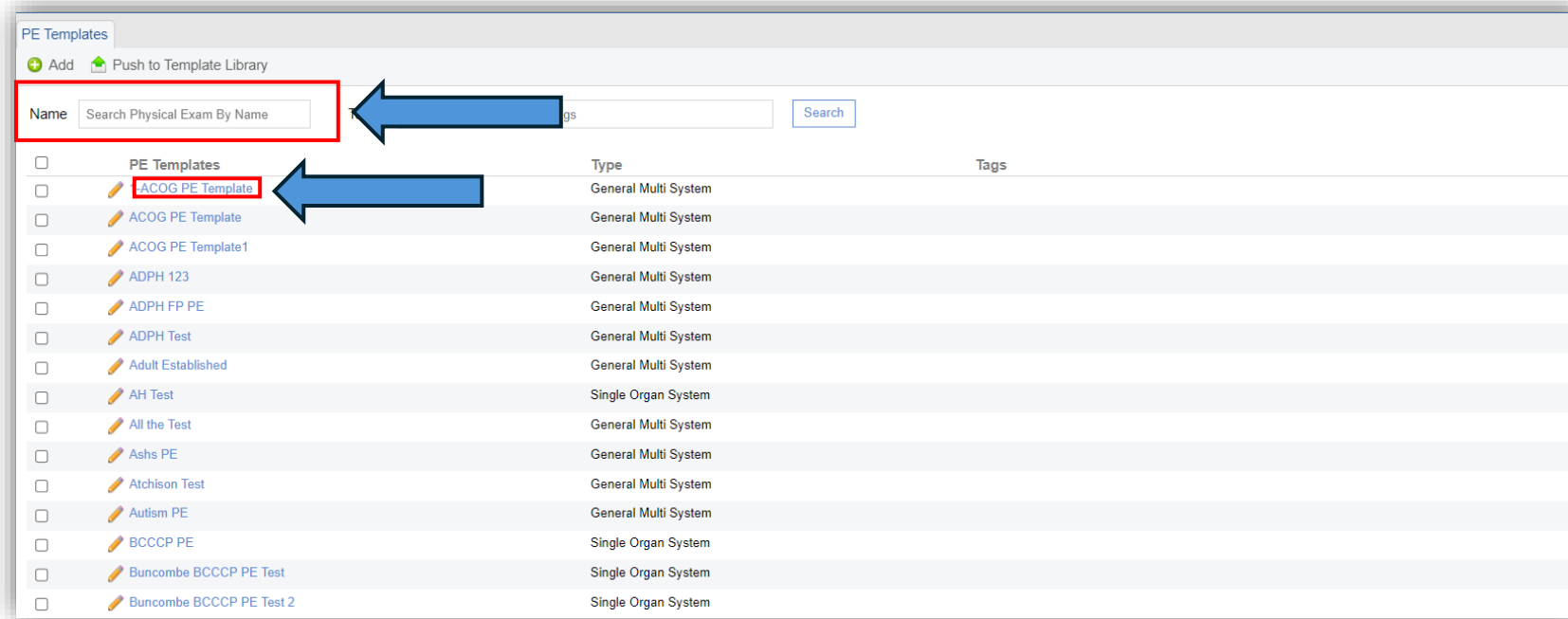
# Building a Physical Exam Template

- 1. Navigate to the Settings module.
- 2. Select EHR
- 3. Templates -> Physical Exams
- 4. Add-> Name and select type-> SAVE


















# Setting Up Your Physical Exam

- Search for your Physical Exam by name
- 2 ways to edit:
  - Click  to edit the PE's name and type.
  - Click on the hyperlinked name to customize the details



The screenshot shows the 'PE Templates' interface. At the top, there are buttons for 'Add' and 'Push to Template Library'. Below these is a search bar with the text 'Search Physical Exam By Name' and a 'Search' button. A red box highlights the search bar, and a blue arrow points to it from the right. Below the search bar is a table with columns for 'PE Templates', 'Type', and 'Tags'. The first row of the table is highlighted, and a red box highlights the name 'ACOG PE Template' in this row. A blue arrow points to this red box from the right. The table contains the following data:

PE Templates	Type	Tags
<input type="checkbox"/>  <a href="#">ACOG PE Template</a>	General Multi System	
<input type="checkbox"/>  <a href="#">ACOG PE Template</a>	General Multi System	
<input type="checkbox"/>  <a href="#">ACOG PE Template1</a>	General Multi System	
<input type="checkbox"/>  <a href="#">ADPH 123</a>	General Multi System	
<input type="checkbox"/>  <a href="#">ADPH FP PE</a>	General Multi System	
<input type="checkbox"/>  <a href="#">ADPH Test</a>	General Multi System	
<input type="checkbox"/>  <a href="#">Adult Established</a>	General Multi System	
<input type="checkbox"/>  <a href="#">AH Test</a>	Single Organ System	
<input type="checkbox"/>  <a href="#">All the Test</a>	General Multi System	
<input type="checkbox"/>  <a href="#">Ashs PE</a>	General Multi System	
<input type="checkbox"/>  <a href="#">Atchison Test</a>	General Multi System	
<input type="checkbox"/>  <a href="#">Autism PE</a>	General Multi System	
<input type="checkbox"/>  <a href="#">BCCCP PE</a>	Single Organ System	
<input type="checkbox"/>  <a href="#">Buncombe BCCCP PE Test</a>	Single Organ System	
<input type="checkbox"/>  <a href="#">Buncombe BCCCP PE Test 2</a>	Single Organ System	



# Editing the PE Template

Settings - Physical Exams

PE Templates Edit PE Template

Add Physical Exam Profile Customize PE Change Order of PE Change Order of Systems, Groups and Characteristics Medical Images

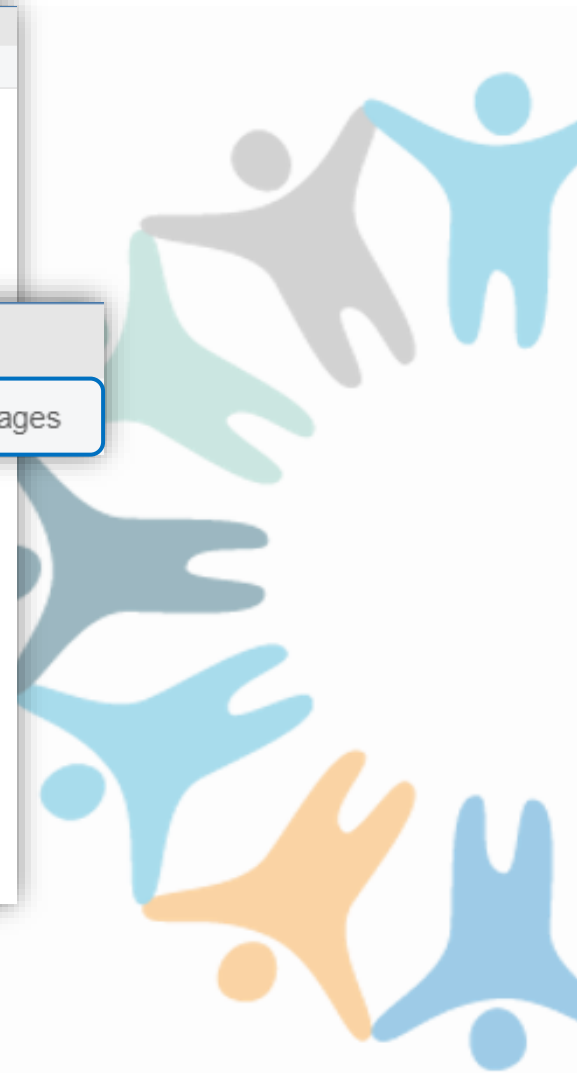
Search

Demographics  
Disease  
HIS Batch Interface  
HIE Partner  
Laboratory  
Radiology

PE Templates Edit PE Template

Add Physical Exam Profile Customize PE Change Order of PE Change Order of Systems, Groups and Characteristics Medical Images

Order Set  
Pharmacy  
Staff  
Surgery  
> Tags  
▼ Templates  
Cardiology Reports  
Flow Sheet  
Notes  
Physical Exams  
Questionnaire  
Review Of Systems  
Vaccine



PE Templates

Edit PE Template

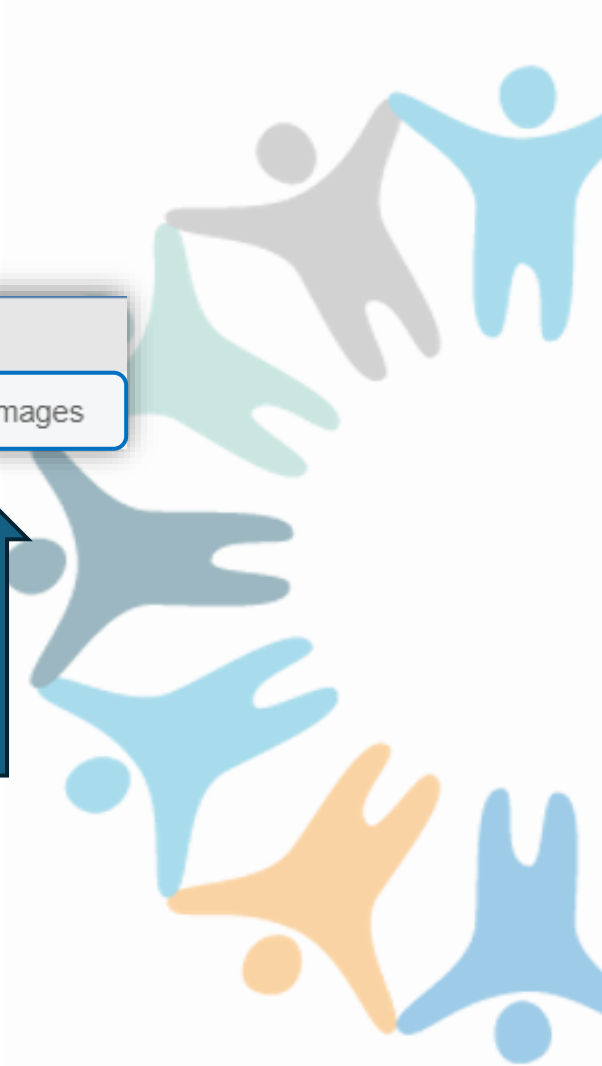
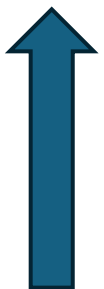
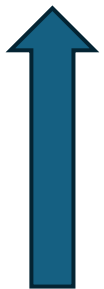
Add Physical Exam Profile

Customize PE

Change Order of PE

Change Order of Systems, Groups and Characteristics

Medical Images

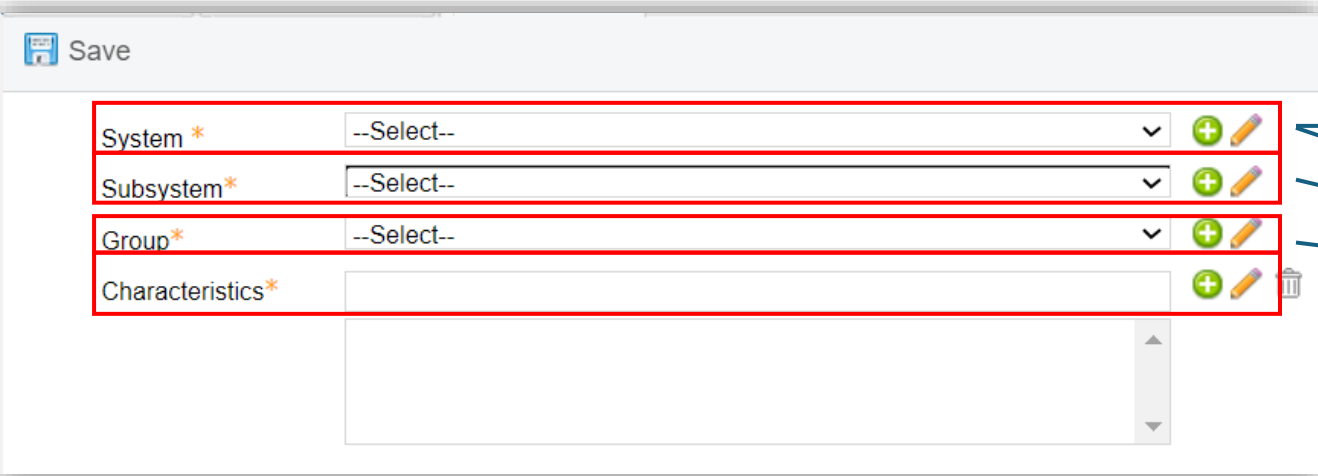




# Physical Exam Profile

This is where you get to pick what appears in your physical exams!

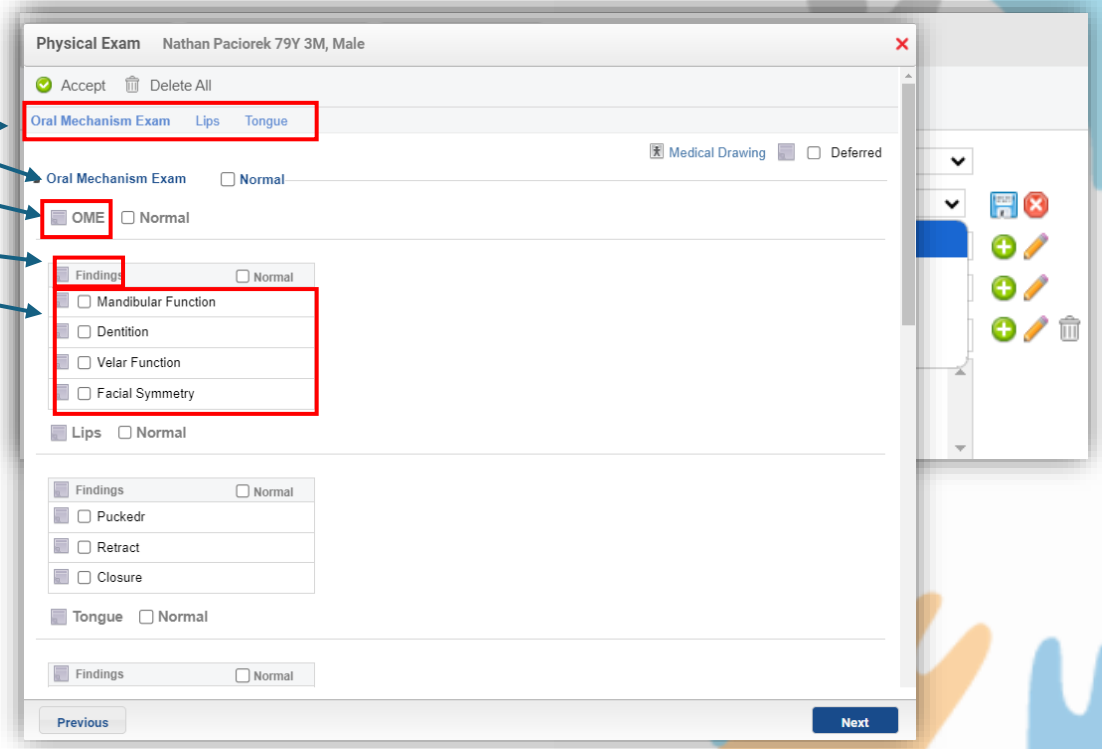
## Backend



A screenshot of a web application's backend configuration page. At the top left is a 'Save' button. Below it are four rows of configuration options, each with a red border:

- System \***: A dropdown menu with "--Select--" and a green plus icon.
- Subsystem \***: A dropdown menu with "--Select--" and a green plus icon.
- Group \***: A dropdown menu with "--Select--" and a green plus icon.
- Characteristics \***: A text input field with a green plus icon and a trash icon.

## Frontend



A screenshot of a web application's frontend physical exam profile form for a patient named Nathan Paciorek. The form is titled "Physical Exam" and includes a "Save" button and a "Delete All" button. The form is organized into sections:

- Oral Mechanism Exam**: A section with a red border containing "Oral Mechanism Exam" and "Lips Tongue".
- OME**: A section with a red border containing "OME" and "Normal".
- Findings**: A section with a red border containing "Mandibular Function", "Dentition", "Velar Function", and "Facial Symmetry".
- Lips**: A section containing "Lips" and "Normal".
- Findings**: A section containing "Findings" and "Normal".
- Tongue**: A section containing "Tongue" and "Normal".
- Findings**: A section containing "Findings" and "Normal".

Back

# Customizing Your Physical Exam

Systems

**Backend**

**Frontend**

PE Templates Edit PE Template Customize PE

Save Disable All

- OME
- Findings
- Mandibular Function
- Dentition
- Velar Function
- Facial Symmetry
- HIDE ME
- Lips
- Findings
- Puckedr
- Retract
- Closure
- Tongue
- Findings
- Retract
- Protract
- Lateralize
- Elevate
- Depress

Check to Hide

Rename/  
Add Sub-  
characteristics

Physical Exam Nathan Paciorek 79Y 3M, Male

Accept Delete All

Oral Mechanism Exam Lips Tongue

Medical Drawing Deferred

Oral Mechanism Exam  Normal

OME  Normal

- Findings  Normal
- Mandibular Function
- Dentition
- Velar Function
- Facial Symmetry

PE: Update Components

Components List

Rename

Sub-Characteristics

Findings  Normal

Previous Next

Peripheral Vessels



# Sub-Characteristics

Back

**Backend**

Physical Exam Nathan Paciorek 79Y 3M, Male

Accept Delete All


Oral Mechanism Exam Lips Tongue

Medical Drawing Deferred

Oral Mechanism Exam Normal

OME Normal

Findings Normal

- Mandibular Function 
- Characteristic 1
- Characteristic 2



# Change Order of PE

Back

## Backend

PE Templates Edit PE Template Change Order Of PE

Save

**PE List**

0	General
1	HEENT
2	Neck
3	Breast
4	Respiratory
5	Cardiovascular
6	Abdominal
7	Male Genitourinary
8	Female OB/GYN/GU
9	Female OB
10	Musculoskeletal
11	Rectal
12	Skin
13	Neurological
14	Lymph Nodes
15	Peripheral Vessels

Order of appearance

## Frontend

Physical Exam Nathan Paciorek 79Y 3M, Male

Accept Delete All

General HEENT Neck Breast Respiratory Cardiovascular Abdominal Male Genitourinary Musculoskeletal Rectal  
Skin Neurological

Medical Drawing Deferred

General Normal

Appearance Normal

<input checked="" type="checkbox"/> Demeanor <input type="checkbox"/> Normal	<input checked="" type="checkbox"/> Development <input type="checkbox"/> Normal
<input type="checkbox"/> Comfortable	<input type="checkbox"/> Well-developed
<input type="checkbox"/> In Acute Distress	<input type="checkbox"/> Well-nourished
<input type="checkbox"/> Restless	<input type="checkbox"/> Obese
<input type="checkbox"/> Uncooperative	<input type="checkbox"/> Underdeveloped
<input type="checkbox"/> Unkempt	<input type="checkbox"/> Emaciated
<input type="checkbox"/> Drowsy	
<input type="checkbox"/> Stuporous	
<input type="checkbox"/> Other	

Comments  Characters left: 2000

Save As Data Template

Previous Next

# Change Order of Systems, Groups, Characteristics

Double click and type to edit order of appearance

## Backend

PE Templates | Edit PE Template | Customize PE

Save

0 Appearance

0	Demeanor
0	Comfortable
1	In Acute Distress
2	Restless
3	Uncooperative
4	Unkempt
5	Drowsy
6	Stuporous
7	Other
8	N/A

1	Development
114	Well-developed
115	Well-nourished
116	Obese
117	Underdeveloped
118	Emaciated

Neurological  
Lymph Nodes  
Peripheral Vessels

## Frontend

Physical Exam | Nathan Paciorek 79Y 3M, Male

Accept | Delete All

General | HEENT | Neck | Breast | Respiratory | Cardiovascular | Abdominal | Male Genitourinary | Musculoskeletal | Rectal  
Skin | Neurological

Medical Drawing | Deferred

General | Normal

Appearance | Normal

<input checked="" type="checkbox"/>	Demeanor	<input type="checkbox"/>	Normal
<input type="checkbox"/>	Comfortable		
<input type="checkbox"/>	In Acute Distress		
<input type="checkbox"/>	Restless		
<input type="checkbox"/>	Uncooperative		
<input type="checkbox"/>	Unkempt		
<input type="checkbox"/>	Drowsy		
<input type="checkbox"/>	Stuporous		
<input type="checkbox"/>	Other		

<input checked="" type="checkbox"/>	Development	<input type="checkbox"/>	Normal
<input type="checkbox"/>	Well-developed		
<input type="checkbox"/>	Well-nourished		
<input type="checkbox"/>	Obese		
<input type="checkbox"/>	Underdeveloped		
<input type="checkbox"/>	Emaciated		

Comments

Save As Data Template

Characters left: 2000

Previous

Back

# Medical Images

The screenshot displays the 'CureMD - Image Editor' interface within a Google Chrome browser. The browser's address bar shows the URL: `app3.curemd.net/curemdg/Patient/Clinical/Case/Soap/NewImageEditor.aspx?fromFlow=P...`. The interface includes a top navigation bar with tabs for 'PE Templates', 'Edit PE Template', and 'Medical Images'. Below this, there are buttons for '+ Add Image' and 'Delete', with a red box highlighting the '+ Add Image' button and a blue arrow pointing to it. The main workspace is divided into several sections: a left sidebar with anatomical icons (ear, skull) and a 'HEENT' tab; a central area showing a medical drawing of a human face with shaded anatomical regions; and a right sidebar with a 'Peripheral Vessels' section. A toolbar at the top of the workspace contains various editing tools, with a red box highlighting the 'Save' icon (a floppy disk). The background of the slide features a decorative graphic of stylized human figures in blue and orange.



# Physical Exam Data Templates



# Creating a Physical Exam Data Template

- 1. Navigate to the Settings module.
- 2. Select EHR
- 3. Data Templates -> Physical Exams
- 4. "Add"
- 5. Select your PE Template

The screenshot shows a software interface with two tabs: 'PE Data Templates' and 'Templates'. Below the tabs is a list of templates. The 'Testing Test' template is highlighted in blue. The list includes the following items:

Template
ACOG PE Template
ADPH FP PE
Family Health Clinic
Ashs PE
Autism PE
BCCCP PE
BCCCP PE
Cardiology-Dr. Tarry
CDDC Progress
Connor PE Test
Connor PE Test
City of Aurora Physical Exam
Respirator Users Physical Exam
CRS SLP PE
Cardiology-Dr. Tarry



# Physical Exam Data Template

## Backend

## Frontend

Checking boxes on the backend will **pre-select** on the frontend

PE Data Templates Edit

Save Delete All

Template Name\*

General HEENT Neck Breast Respiratory Cardiovascular Abdominal Male Genitourinary Female OB/GYN/GU Musculoskeletal Neurological Psychiatric

General  Normal

Appearance  Normal

<input type="checkbox"/> Demeanor <input type="checkbox"/> Normal	<input type="checkbox"/> Development <input type="checkbox"/> Normal
<input checked="" type="checkbox"/> Comfortable	<input checked="" type="checkbox"/> Well-developed
<input type="checkbox"/> In Acute Distress	<input checked="" type="checkbox"/> Well-nourished
<input type="checkbox"/> Restless	<input type="checkbox"/> Obese
<input type="checkbox"/> Other	<input type="checkbox"/> Underdeveloped

Comments  Characters left: 2000

Exam Comments  Characters left: 2000

Physical Exam Nathan Paciorek 79Y 3M, Male ✕

Accept Delete All

General HEENT Neck Breast Respiratory Cardiovascular Abdominal Male Genitourinary Musculoskeletal  
Neurological Psychiatric

Medical Drawing  Deferred

General  Normal

Appearance  Normal

<input type="checkbox"/> Demeanor <input type="checkbox"/> Normal	<input type="checkbox"/> Development <input type="checkbox"/> Normal
<input checked="" type="checkbox"/> Comfortable	<input checked="" type="checkbox"/> Well-developed
<input type="checkbox"/> In Acute Distress	<input checked="" type="checkbox"/> Well-nourished
<input type="checkbox"/> Restless	<input type="checkbox"/> Obese
<input type="checkbox"/> Other	<input type="checkbox"/> Underdeveloped

Comments  Characters left: 2000

Save As Data Template

Exam Comments  Characters left: 2000

Previous Next

# Food For Thought?

Who knows the difference between physical exams and review of systems?



# Review of Systems Templates



# Building a Review of Systems Template

- 1. Navigate to the Settings module.
- 2. Select EHR
- 3. Templates -> Review of Systems
- 4. Add

The screenshot shows the 'ROS Templates' interface. At the top left, there is a '+ Add' button highlighted with a red box, and a blue arrow points to it from the left. To its right is a 'Push to Template Library' button. Below these are two search bars: 'Search ROS Templates by Name' and 'Search ROS Templates by Tags' with a 'Search' button. The main area contains a table with two columns: 'ROS Templates' and 'Tags'. The table lists various templates, each with a checkbox on the left and a tag on the right. The templates listed are: A JCPH Test, Annual Adult ROS (GG Test), App State Psychology (tagged 'App State'), Atchison Test, Bryon Test (tagged 'FP'), Cardiology, Carolina Digestive ROS, CD ROS, CDDC, CDDC ROS Progress 1, Child Health ROS, Common Fem Care, Comprehensive ROS, Connor ROS Test, and Dr. Coopers ROS.

ROS Templates	Tags
<input type="checkbox"/> A JCPH Test	
<input type="checkbox"/> Annual Adult ROS (GG Test)	
<input type="checkbox"/> App State Psychology	App State
<input type="checkbox"/> Atchison Test	
<input type="checkbox"/> Bryon Test	FP
<input type="checkbox"/> Cardiology	
<input type="checkbox"/> Carolina Digestive ROS	
<input type="checkbox"/> CD ROS	
<input type="checkbox"/> CDDC	
<input type="checkbox"/> CDDC ROS Progress 1	
<input type="checkbox"/> Child Health ROS	
<input type="checkbox"/> Common Fem Care	
<input type="checkbox"/> Comprehensive ROS	
<input type="checkbox"/> Connor ROS Test	
<input type="checkbox"/> Dr. Coopers ROS	



# Review of Systems Template

## Backend

## Frontend

ROS Templates Add ROS Templates

Save

Template Name\*

Tags Associate Tags

Systems

**Add new system**

**Order of appearance (Systems)**

Sequence	System	Applicable For
0	Breast	Females
1	Breast Bruising	
2	Breast Hardness	
3	Breast Lumps	
4	Breast Mass	
5	Breast Pain	
6	Breast Redness	
7	Breast Tenderness	
8	Cracked Nipples	
9	Engorged Breast	
10	Nipple Discharge	
11	Nipple Pain	
	Skin Changes	
1	Cardiovascular	Both
2	Endocrine	Both
3	Female Genitourinary	Females
4	Gastrointestinal	Both
5	General	Both
6	HEENT	Both
7	Hematology	Both
8	Immunology	Both
9	Lymphatic	Both

**Order of appearance (Characteristics)**

**Edit Name**

**Gender-Specific**

Review of Systems Nathan Paciorek 79Y 3M, Male

Accept

Cardiovascular Endocrine Gastrointestinal General  
HEENT Hematology Immunology Lymphatic  
Male Genitourinary Musculoskeletal Neurological Psychiatric

System Review

Characters left: 2000

+ve -ve Characteristic Clear

Chest Pain  
  Claudication  
  Cyanosis  
  Dyspnea on Exertion  
  Edema  
  Hypertension  
  Murmur  
  Night Cramps

Description

Status --Select--

Onset

Pattern --Select-- Duration --Select--  
Severity --Select--

Course --Select-- Radiation --Select--  
Aggravated By --Select-- Relieved By --Select--

Location

Associated Features

Comments

Characters left: 2000

Save As Data Template

Previous Next

These boxes **MUST** be checked for the systems/characteristics to show on the frontend.

Edit Name

Gender-Specific

# Review of Systems Data Templates



# Building a Review of Systems Data Template

1. Navigate to the Settings module.
2. Select EHR
3. Data Templates -> Review of Systems
4. Add
5. Select Review of Systems Template

The screenshot displays the CureMD Version 10g Settings interface. The top navigation bar includes 'CureMD version 10g', 'Inbox', and 'Today's Patients'. The main content area is titled 'CureMD Version 10g Settings' and features a search bar. Below the search bar, the 'ROS Data Templates' section is visible, containing a table with the following data:

Data Template Name	Template
CH ROS	CH ROS
Dental	Dental
FP ROS	FP ROS
STD NEW ROS	STD ROS-NEW
symptoms of TB	
TB Symptoms	TB ROS

In the left-hand navigation menu, the 'Settings' gear icon is highlighted with a red box. Below it, the 'Data Template' option is also highlighted with a red box, and the 'Review Of Systems' option is highlighted with a red box. The 'Add' button in the 'ROS Data Templates' section is also highlighted with a red box.

# Building a Review of Systems Data Template

## Backend

## Frontend

Selecting on the backend will **pre-select** on the frontend

ROS Data Templates Edit

Save Delete

Template Name\* Nathan Test

Breast	Cardiovascular	Endocrine	Female Genitourinary
Gastrointestinal	General	HEENT	Hematology
Immunology	Lymphatic	Male Genitourinary	Musculoskeletal

System Review

Characters left: 2000

+ve -ve Characteristic Clear

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chest Pain
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Claudication
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cyanosis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dyspnea on Exertion
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edema
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hypertension
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Murmur
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Night Cramps

Comments

Characters left: 2000

Review of Systems Nathan Paciorek 79Y 3M, Male

Accept

Cardiovascular	Endocrine	Gastrointestinal	General
HEENT	Hematology	Immunology	Lymphatic
Male Genitourinary	Musculoskeletal	Neurological	Psychiatric

System Review

Characters left: 2000

+ve -ve Characteristic Clear

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Chest Pain
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Claudication
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cyanosis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dyspnea on Exertion
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edema
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hypertension
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Murmur
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Night Cramps

Description

Status --Select--

Onset Duration --Select--

Pattern --Select-- Severity --Select--

Course --Select-- Radiation --Select--

Aggravated By --Select-- Relieved By --Select--

Location

Associated Features

Comments

Characters left: 2000

Save As Data Template

Previous Next



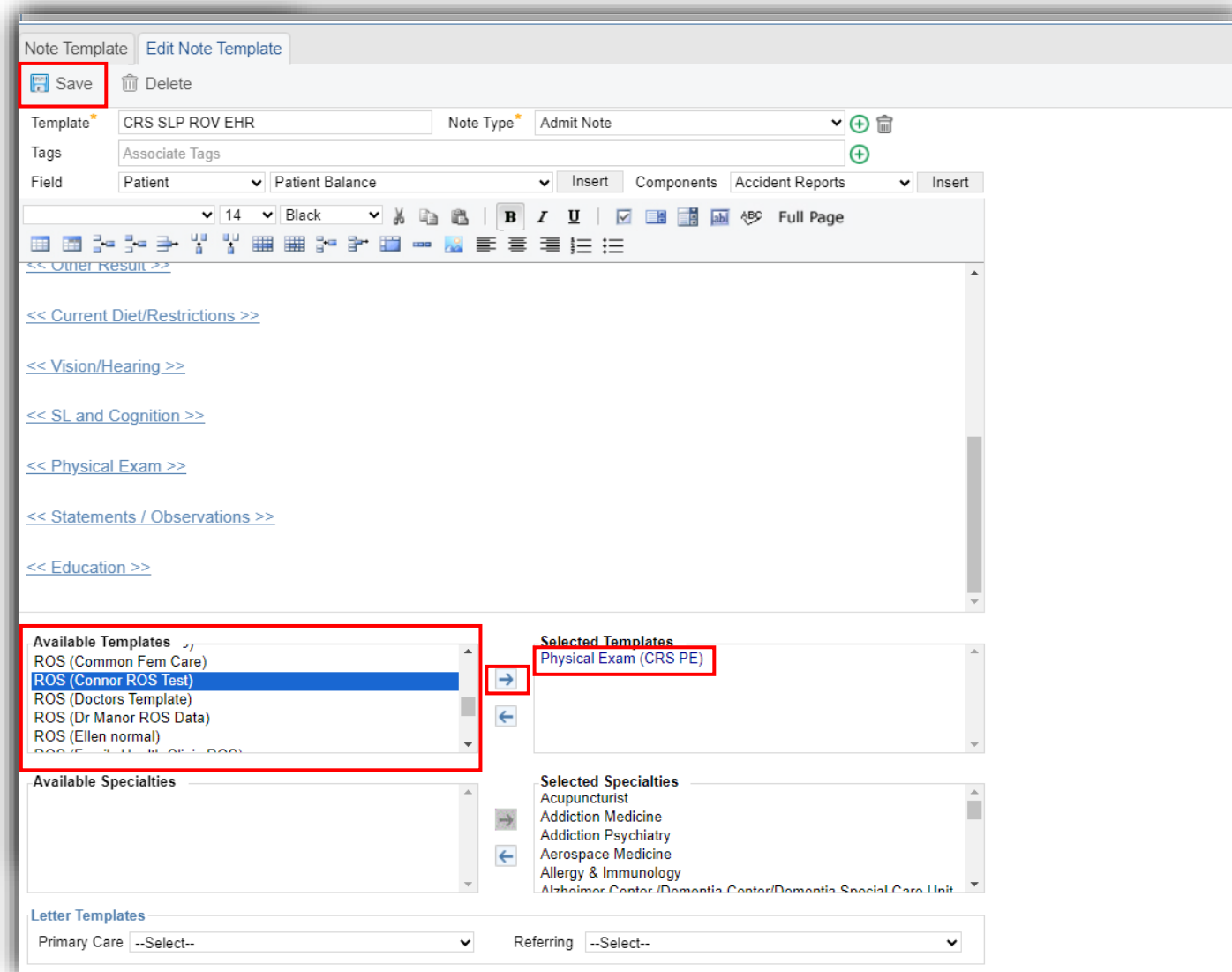


# Why Bother With Data Templates?



# Defaulting Data Templates to a Note Template

1. Navigate to Settings->EHR->Templates->Notes
2. Search for and select desired note template
3. Scroll to the bottom of the note
4. Find Data template for your ROS and PE
5. Press the -> Arrow key to push them to “selected”
6. SAVE!



Questions?



Thank you!

