

Note Types and Default Sections

Tebra provides several types of notes. Each note type contains default sections with various entry options to make documenting easy. The table below outlines the default sections for each note type and the type of entry options under each section. You can always add sections to, or remove sections from, the default list.

Note Type	Default Section Headers and Entry Options
H&P (History and Physical)	CC: Text Shortcut and free-form text HPI: Text Shortcut, Template, and free-form text PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.) PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.) FHx: Select family history (e.g., Diabetes, Hypertension, etc.) Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.) Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.) Hospitalizations: Add and manage hospitalizations or procedures Implantable Devices: Add and manage implantable devices ROS: Text Shortcut, Template, and free-form text Medications: Manage <i>Active</i> , <i>Discontinued</i> , or <i>Not Administered</i> medications Allergies: Manage <i>Active</i> or <i>Inactive</i> allergies Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text Vitals: Add and manage vitals EXAM: Text Shortcut, Template, and free-form text Assessment: Text Shortcut, Include Problems, and free-form text Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text Minor Procedures: Text Shortcut, Template, and free-form text Goals: Text Shortcut, Template, and free-form text Health Concerns: Text Shortcut and free-form text
SOAP	CC: Text Shortcut and free-form text Subjective: Text Shortcut, Template, and free-form text Medications: Manage <i>Active</i> , <i>Discontinued</i> , or <i>Not Administered</i> medications Allergies: Manage <i>Active</i> or <i>Inactive</i> allergies Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text Vitals: Add and manage vitals Objective: Text Shortcut, Template, and free-form text Assessment: Text Shortcut, Include Problems, and free-form text Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Acupuncture Follow Up

CC: Text Shortcut and free-form text

Subjective: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

Allergies: Manage *Active* or *Inactive* allergies

Objective: Text Shortcut, Template, and free-form text

TCM Exam: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Treatment: Text Shortcut, Template, and free-form text

Acupuncture Initial Visit

CC: Text Shortcut and free-form text

Subjective: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

Allergies: Manage *Active* or *Inactive* allergies

Objective: Text Shortcut, Template, and free-form text

TCM Exam: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Treatment: Text Shortcut, Template, and free-form text

Acupuncture Reassessment

CC: Text Shortcut and free-form text

Subjective: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

Allergies: Manage *Active* or *Inactive* allergies

Objective: Text Shortcut, Template, and free-form text

TCM Exam: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Treatment: Text Shortcut, Template, and free-form text

Amendment

Source of Request: Text Shortcut and free-form text

Request Details: Text Shortcut and free-form text

Decision: Manage decision, Text Shortcut, and free-form text

Consultation

CC: Text Shortcut and free-form text

HPI: Text Shortcut, Template, and free-form text

PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.)

PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.)

FHx: Select family history (e.g., Diabetes, Hypertension, etc.)

Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.)

Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.)

Hospitalizations: Add and manage hospitalizations or procedures

Implantable Devices: Add and manage implantable devices

ROS: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered*

medications

Allergies: Manage *Active* or *Inactive* allergies

Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text

Vitals: Add and manage vitals

EXAM: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Minor Procedures: Text Shortcut, Template, and free-form text

Goals: Text Shortcut, Template, and free-form text

Health Concerns: Text Shortcut and free-form text

Discharge Summary

CC: Text Shortcut and free-form text

HPI: Text Shortcut, Template, and free-form text

PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.)

PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.)

FHx: Select family history (e.g., Diabetes, Hypertension, etc.)

Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.)

Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.)

Hospitalizations: Add and manage hospitalizations or procedures

Implantable Devices: Add and manage implantable devices

ROS: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

Allergies: Manage *Active* or *Inactive* allergies

Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text

Vitals: Add and manage vitals

EXAM: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Minor Procedures: Text Shortcut, Template, and free-form text

Goals: Text Shortcut, Template, and free-form text

Health Concerns: Text Shortcut and free-form text

Group

Group Session Content: Text Shortcut and free-form text

Session Details: Text Shortcut and free-form text

Individual Behavior during Session: Text Shortcut and free-form text

DSM-5: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Med Spa IV Procedure

Procedure: Text Shortcut, Template, and free-form text

Performed By: Text Shortcut, Template, and free-form text

Indication: Text Shortcut, Template, and free-form text

Comments: Free-form text

Procedure: Text Shortcut, Template, and free-form text

Med Spa Procedure	Performed By: Text Shortcut, Template, and free-form text Indication: Text Shortcut, Template, and free-form text Comments: Free-form text
Memo to Record	Memo: Free-form text
Nurse Visit	HPI: Text Shortcut, Template, and free-form text PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.) PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.) FHx: Select family history (e.g., Diabetes, Hypertension, etc.) Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.) Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.) Hospitalizations: Add and manage hospitalizations or procedures Medications: Manage Active, Discontinued, or Not Administered medications Allergies: Manage Active or Inactive allergies Vitals: Add and manage vitals
OB Evaluation	CC: Text Shortcut and free-form text HPI: Text Shortcut, Template, and free-form text PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.) PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.) FHx: Select family history (e.g., Diabetes, Hypertension, etc.) Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.) Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.) Past Pregnancy Hx: Text Shortcut, Template, and free-form text Hospitalizations: Add and manage hospitalizations or procedures Medications: Manage Active, Discontinued, or Not Administered medications Allergies: Manage Active or Inactive allergies Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text Vitals: Add and manage vitals Exam: Text Shortcut, Template, and free-form text Gestational Age: Text Shortcut, Template, and free-form text OB Exam: Text Shortcut, Template, and free-form text Past Lab Hx: Text Shortcut, Template, and free-form text Assessment: Text Shortcut, Include Problems, and free-form text Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Office Form	Form: Text Shortcut, Template, and free-form text
Phone	Discussion: Free-form text

Physical Therapy Discharge Summary	Reason for Referral: Text Shortcut, Template, free-form text Subjective: Text Shortcut, Template, free-form text Objective: Text Shortcut, Template, free-form text Tests and Measures: Text Shortcut, Template, free-form text Treatment: Text Shortcut, Template, free-form text Assessment: Text Shortcut, Include Problems Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Physical Therapy Initial Evaluation	Reason for Referral: Text Shortcut, Template, free-form text Subjective: Text Shortcut, Template, free-form text Medications: Manage <i>Active</i> , <i>Discontinued</i> , or <i>Not Administered</i> medications Vitals: Add and manage vitals Objective: Text Shortcut, Template, free-form text Tests and Measures: Text Shortcut, Template, free-form text Treatment: Text Shortcut, Template, free-form text Assessment: Text Shortcut, Include Problems Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Physical Therapy Interim	Reason for Referral: Text Shortcut, Template, free-form text Subjective: Text Shortcut, Template, free-form text Medications: Manage <i>Active</i> , <i>Discontinued</i> , or <i>Not Administered</i> medications Vitals: Add and manage vitals Objective: Text Shortcut, Template, free-form text Tests and Measures: Text Shortcut, Template, free-form text Treatment: Text Shortcut, Template, free-form text Assessment: Text Shortcut, Include Problems Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Physical Therapy Progress	Reason for Referral: Text Shortcut, Template, free-form text Subjective: Text Shortcut, Template, free-form text Medications: Manage <i>Active</i> , <i>Discontinued</i> , or <i>Not Administered</i> medications Vitals: Add and manage vitals Objective: Text Shortcut, Template, free-form text Tests and Measures: Text Shortcut, Template, free-form text Treatment: Text Shortcut, Template, free-form text Assessment: Text Shortcut, Include Problems Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Procedure	Procedure: Text Shortcut, Template, and free-form text Performed By: Text Shortcut, Template, and free-form text Indication: Text Shortcut, Template, and free-form text Comments: Free-form text CC: Text Shortcut and free-form text HPI: Text Shortcut, Template, and free-form text

Psych Initial Visit	<p>PsychHx: Text Shortcut, Template, and free-form text</p> <p>PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.)</p> <p>PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.)</p> <p>PsychFHx: Text Shortcut, Template, and free-form text</p> <p>PsychSHx: Text Shortcut, Template, and free-form text</p> <p>Medications: Manage <i>Active</i>, <i>Discontinued</i>, or <i>Not Administered</i> medications</p> <p>MSE: Text Shortcut, Template, and free-form text</p> <p>Tests: Screening Tools, Text Shortcut, Template, and free-form text</p> <p>Psych Impression: Text Shortcut, Template, and free-form text</p> <p>DSM-5: Text Shortcut, Template, and free-form text</p> <p>Assessment: Text Shortcut, Include Problems, and free-form text</p> <p>Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text</p>
Psych Progress	<p>CC: Text Shortcut and free-form text</p> <p>Psych Symptom/Follow Up: Text Shortcut, Template, and free-form text</p> <p>Psych Syndromes: Text Shortcut, Template, and free-form text</p> <p>Medications: Manage <i>Active</i>, <i>Discontinued</i>, or <i>Not Administered</i> medications</p> <p>MSE: Text Shortcut, Template, and free-form text</p> <p>Psych Impression: Text Shortcut, Template, and free-form text</p> <p>DSM-5: Text Shortcut, Template, and free-form text</p> <p>Psych Intervention: Text Shortcut, Template, and free-form text</p> <p>Assessment: Text Shortcut, Include Problems, and free-form text</p> <p>Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text</p>
Speech and Language Initial Evaluation	<p>CC: Text Shortcut and free-form text</p> <p>History: Text Shortcut, Template, and free-form text</p> <p>Speech Development: Text Shortcut, Template, and free-form text</p> <p>Receptive/Expressive Language: Text Shortcut, Template, and free-form text</p> <p>Pragmatics: Text Shortcut, Template, and free-form text</p> <p>Oral Mechanism Exam: Text Shortcut, Template, and free-form text</p> <p>Articulation: Text Shortcut, Template, and free-form text</p> <p>Fluency: Text Shortcut, Template, and free-form text</p> <p>Voice: Text Shortcut, Template, and free-form text</p> <p>Assessment: Text Shortcut, Include Problems, and free-form text</p> <p>Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text</p> <p>Goals: Text Shortcut and free-form text</p>
Speech and Language Progress Report	<p>CC: Text Shortcut and free-form text</p> <p>Subjective: Text Shortcut, Template, and free-form text</p> <p>Current Goals: Text Shortcut and free-form text</p> <p>Receptive/Expressive Language: Text Shortcut, Template, and free-form text</p> <p>Pragmatics: Text Shortcut, Template, and free-form text</p> <p>Oral Mechanism Exam: Text Shortcut, Template, and free-form text</p> <p>Articulation: Text Shortcut, Template, and free-form text</p> <p>Fluency: Text Shortcut, Template, and free-form text</p>

Voice: Text Shortcut, Template, and free-form text
Assessment: Text Shortcut, Include Problems, and free-form text
Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Goals: Text Shortcut and free-form text

Speech and Language Treatment Note

CC: Text Shortcut and free-form text
Subjective: Text Shortcut, Template, and free-form text
Objective (Speech/Language): Text Shortcut, Template, and free-form text
Assessment: Text Shortcut, Include Problems, and free-form text
Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Goals: Text Shortcut and free-form text

Telehealth H&P

CC: Text Shortcut and free-form text
HPI: Text Shortcut, Template, and free-form text
PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.)
PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.)
FHx: Select family history (e.g., Diabetes, Hypertension, etc.)
Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.)
Ob Preg Hx: Select OB and pregnancy history (e.g., History of HRT Use, Total Pregnancy, etc.)
Hospitalizations: Add and manage hospitalizations or procedures
Implantable Devices: Add and manage implantable devices
ROS: Text Shortcut, Template, and free-form text
Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications
Allergies: Manage *Active* or *Inactive* allergies
Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text
Vitals: Add and manage vitals
EXAM: Text Shortcut, Template, and free-form text
Assessment: Text Shortcut, Include Problems, and free-form text
Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text
Goals: Text Shortcut and free-form text
Health Concerns: Text Shortcut and free-form text

Telehealth SOAP

CC: Text Shortcut and free-form text
Subjective: Text Shortcut, Template, and free-form text
Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications
Allergies: Manage *Active* or *Inactive* allergies
Mental/Functional: Screening Tools, Text Shortcut, Template, and free-form text
Vitals: Add and manage vitals
Objective: Text Shortcut, Template, and free-form text
Assessment: Text Shortcut, Include Problems, and free-form text
Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

CC: Text Shortcut and free-form text

Therapist Initial Visit

HPI: Text Shortcut, Template, and free-form text

PsychHx: Text Shortcut, Template, and free-form text

PsychFHx: Text Shortcut, Template, and free-form text

PsychSHx: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

MSE: Text Shortcut, Template, and free-form text

Tests: Screening Tools, Text Shortcut, Template, and free-form text

Psych Impression: Text Shortcut, Template, and free-form text

DSM-5: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Therapist Progress

CC: Text Shortcut and free-form text

Psych Symptom/Follow Up: Text Shortcut, Template, and free-form text

Psych Syndromes: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

MSE: Text Shortcut, Template, and free-form text

Psych Impression: Text Shortcut, Template, and free-form text

DSM-5: Text Shortcut, Template, and free-form text

Psych Intervention: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Urgent Care

CC: Text Shortcut and free-form text

HPI: Text Shortcut, Template, and free-form text

PMHx: Select past medical history (e.g., Blindness, Angina, Gout, etc.)

PSHx: Select past surgical history (e.g., Appendectomy, LASIK, etc.)

FHx: Select family history (e.g., Diabetes, Hypertension, etc.)

Soc Hx: Select social history (e.g., Former smoker, Wear seatbelts, etc.)

Hospitalizations: Add and manage hospitalizations or procedures

ROS: Text Shortcut, Template, and free-form text

Medications: Manage *Active*, *Discontinued*, or *Not Administered* medications

Allergies: Manage *Active* or *Inactive* allergies

Vitals: Add and manage vitals

Exam: Text Shortcut, Template, and free-form text

Diagnostic Studies: Text Shortcut, Template, and free-form text

Medical Decision Making: Text Shortcut, Template, and free-form text

Assessment: Text Shortcut, Include Problems, and free-form text

Plan: Text Shortcut, Patient Education, Template, Medications, Vaccines, Labs/Studies, and free-form text

Minor Procedures: Text Shortcut, Template, and free-form text