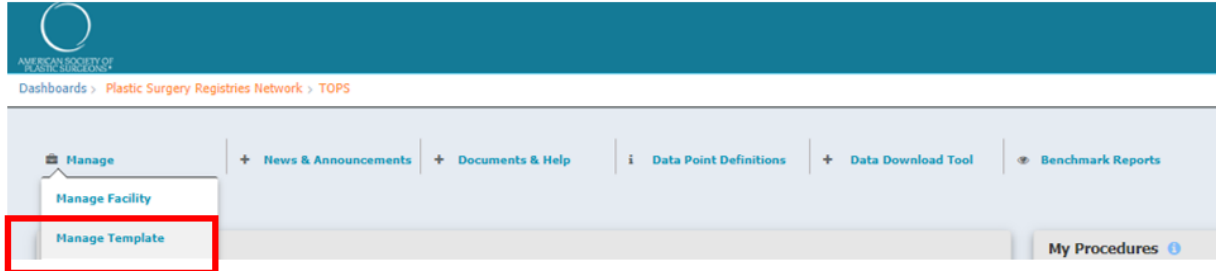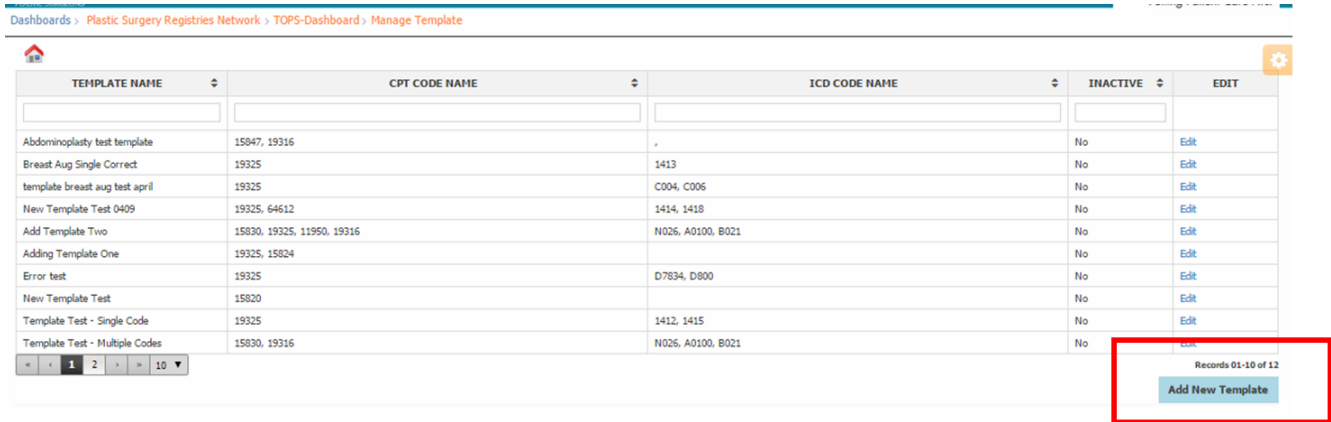**MANAGING CUSTOM TEMPLATES**

- From the TOPS Data Dashboard screen, click on the **Manage** link located at the top of the home page and select **Manage Template** from the dropdown:

- You can view, edit and manage all your custom templates from the Manage Template dashboard. Click on Add New Template to build a new template:

- Please enter the following data fields for your template to be saved as completed:
  - Template Name
  - CPT Code *(this field in **mandatory**)*
    - You may add multiple CPT-Codes to the template
  - Diagnosis Description
    - To save a case as completed, you are required to enter a **Diagnosis Description,** even if you do not enter an ICD-10 code(s). To enter a Diagnosis Description for the template, click on the **Add Description** button and type in your procedure description.
  - Anatomy
  - Classification
  - Procedure Duration (skin-to-skin) *(this field in **mandatory**)*
  - Anesthesia Provided by
  - Mode of Anesthesia

- After entering all data fields for your template, click on the **Save** button**:**

- If mandatory data fields are left blank from the template, a Confirmation message will display the missing mandatory fields. Click **Cancel** to return to template and enter any missing mandatory fields. Click **Save** to continue.

- After saving your template, the new custom template will appear in the manage template dashboard. You can sort templates by clicking on the arrow next to TEMPLATE NAME:

| TEMPLATE NAME	CPT CODE NAME	ICD CODE NAME	INACTIVE	EDIT
Abdominoplasty test template	15847, 19316	,	No	Edit
Add Template Two	15830, 19325, 11950, 19316	N026, A0100, B021	No	Edit
Adding Template One	19325, 15824		No	Edit
Breast Aug	19325		No	Edit
Breast Aug Single Correct	19325	1413	No	Edit
Error test	19325	D7834, D800	No	Edit
New Template	19325		No	Edit
New Template Test	15820		No	Edit
New Template Test 0409	19325, 64612	1414, 1418	No	Edit
template breast aug test april	19325	C004, C006	No	Edit

Records 01-10 of 13

Add New Template

- To apply your custom template, from the **Procedures** tab click on **Apply a Template (optional)** link:
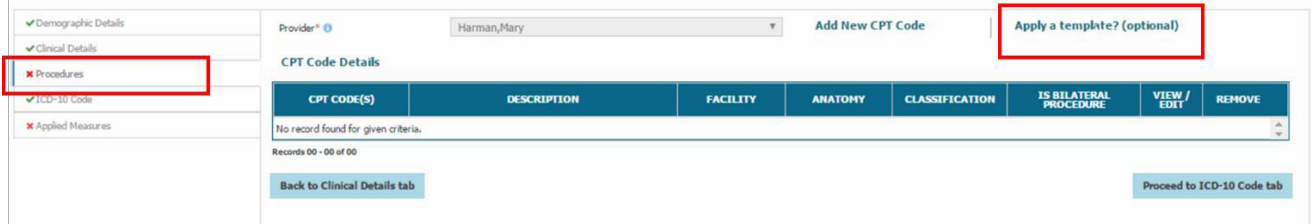

- Select your custom template from the template drop-down and click OK:
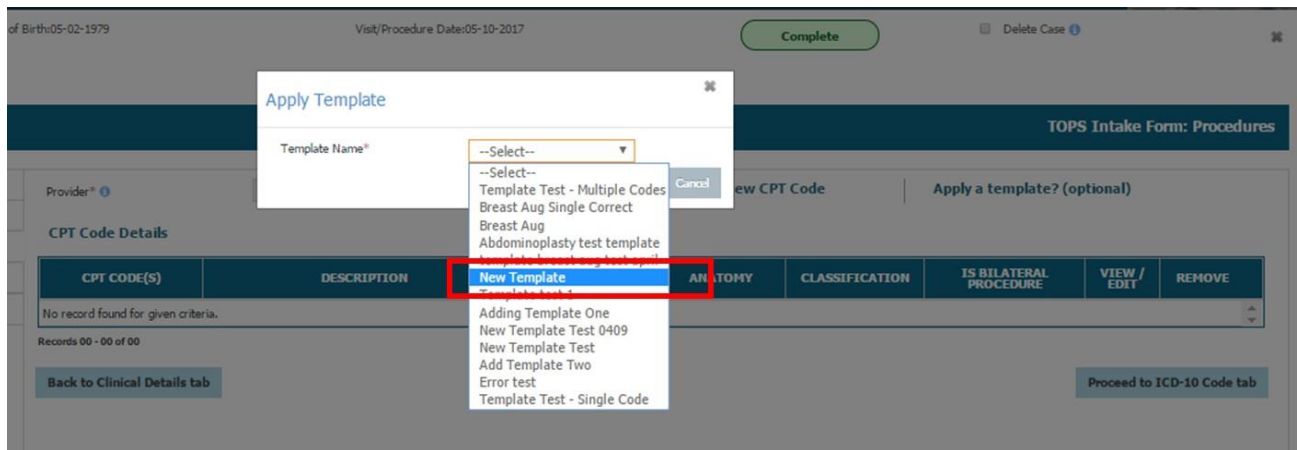
- Your custom template will be applied to the case and saved under the CPT Code Details table in addition to the ICD-10 Code Details on the ICD-10 Code tab. The name of the template applied appears on top of the Procedures tab page:
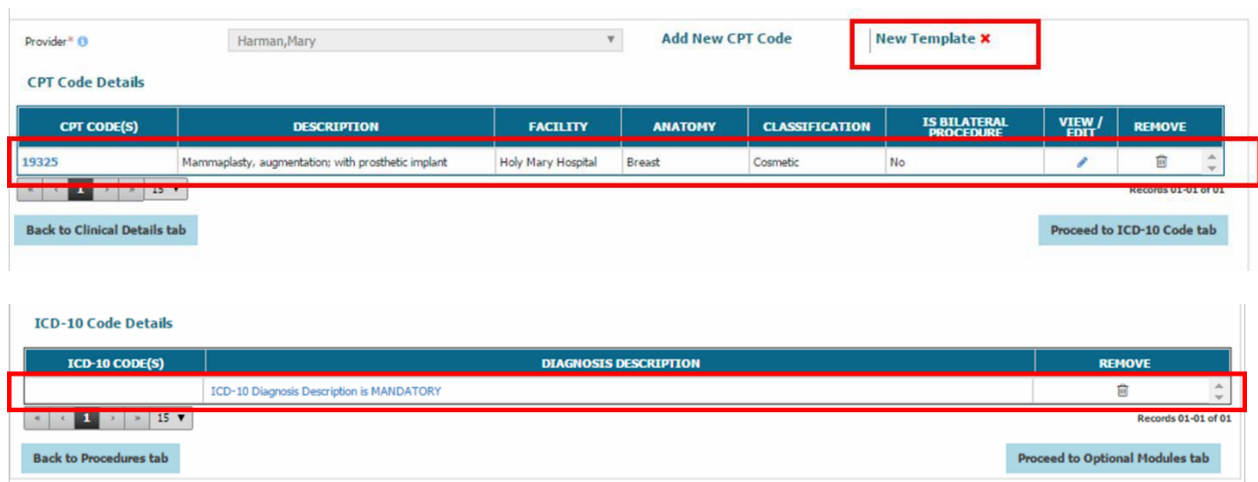
- Only one template may be applied for each case. Selecting a second template will overwrite the values for the template you have already applied for the case:
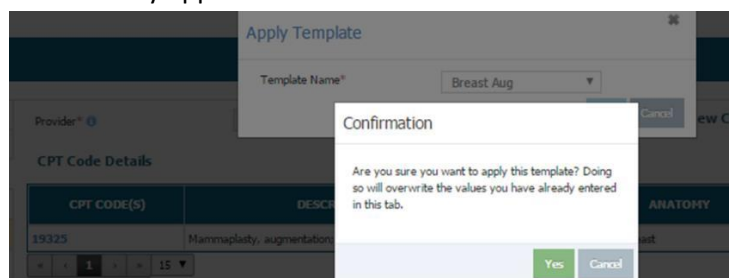
- To delete the applied template, click on the red **X** located next to the name of the applied template on the Procedure tab. All values applied for the template will be removes from the CPT Code Details table in addition to the ICD-10 Code Details table:

- You also have the option to add additional CPT-Codes to a case with a template already applied. To add additional CPT-codes for a case with an applied template, just click on the **Add New CPT Code** link and enter any additional codes along with mandatory data fields for the Procedure:

- You can also view, edit, or remove any CPT-codes or ICD-10 code applied from your template by clicking on the pencil icon or trash can icon under the VIEW/EDIT column: