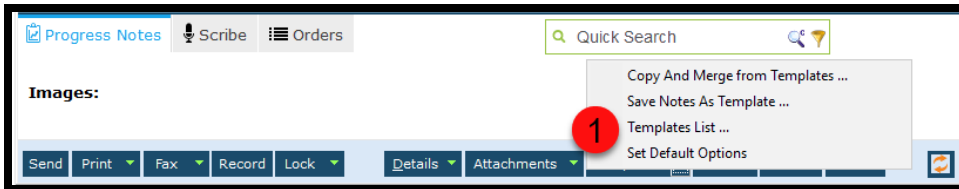


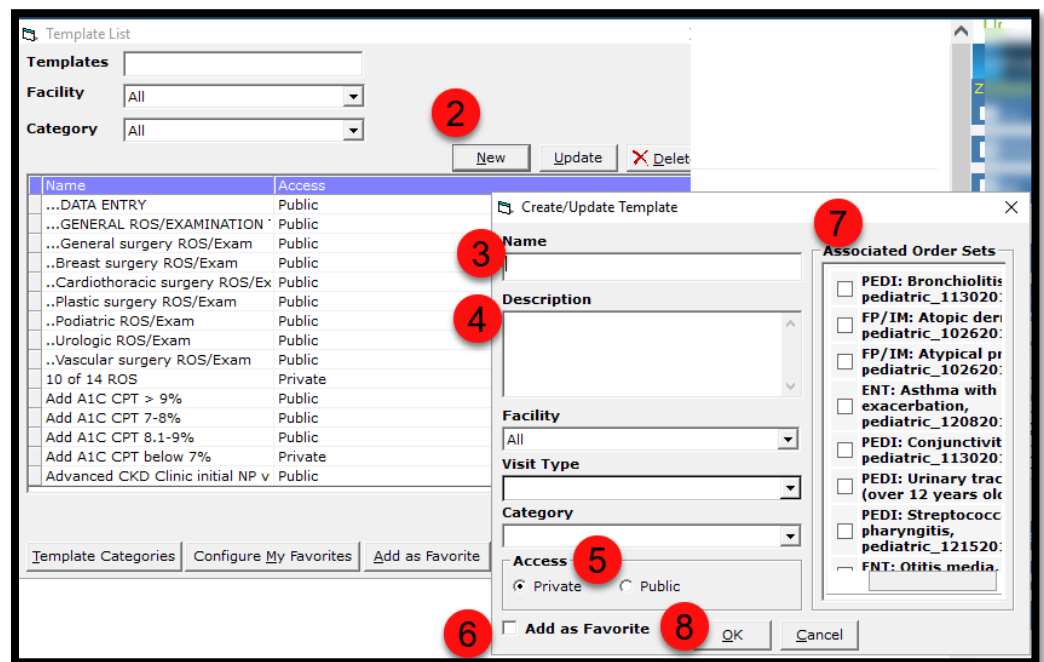
Templates can be used to merge commonly used block text into a progress note or virtual visit.

Creating New Templates

Templates can be accessed from the bottom of the progress note in the caret next to **Templates**.



1. Click on Template List.
2. Select New.
3. Create a custom name for the template. Use your initials to name templates you create to make them easy to identify.
4. Description, Facility, Visit Type, and Category are optional fields.
5. **Access** – can be Private or Public.
 - a. **Private:** The creator of the template can modify the template, all Users can view/merge the template.
 - b. **Public:** All users can view/merge and modify the template.



6. Check the **Add as Favorite** box.
7. Order Sets can be associated with templates but it is not required.
8. Click **Ok** when complete to open a blank template.

Note:

In the treatment section, Current **Orders** can be used but **Future Orders** and **Standing Order** don't function properly in a template.

Merging a Template into Progress Note

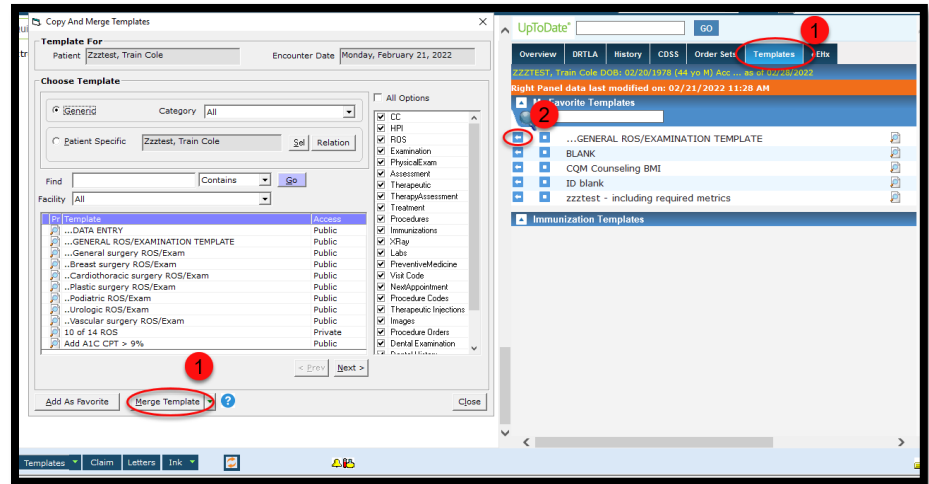
Merge Template adds data to a progress note.

From the right chart panel:

1. Select the desired template.
2. Click the sideways arrow next to the template.

From the Templates caret:

1. Click Merge Template.

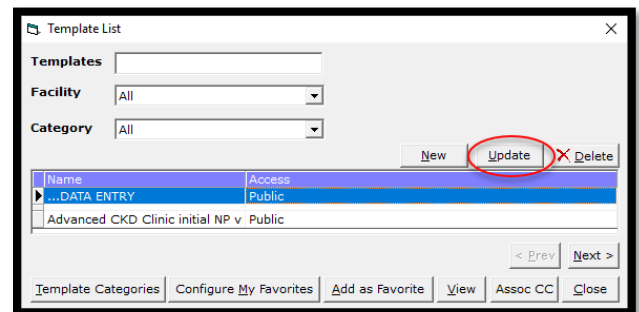


Note:

Multiple templates may be merged into the same note. **Copying a template will overwrite all existing information in the Progress Note that is currently in use.**

Modifying Existing Templates

1. Access the **Template List** from the File drop-down or the caret next to **Templates** in the **Progress Note**.
2. Click on the template to be updated to select.
3. Click Update and make necessary modifications to the Name, Description, Facility, Visit Type, Category, or Access.
4. Click **OK** to access the template.
 - a. The template name will now appear as the patient's name.
5. Make necessary changes to the template, they will automatically save.



Copying Existing Template

1. Access the **Template List** from the File drop-down or the caret next to **Templates** in the **Progress Note**.
2. Double-click on the template to be copied
3. In the template click on the caret next to **Templates** at the bottom of the screen.
4. Select **Save Note as Template**.
5. Rename the new template with the prescribed naming convention.
6. Click **Ok**.
7. Modify the new template accordingly, all changes will be saved automatically.

