**Hands-on exercise – build a simple template with the following goals. Please note – the main utility is practice, so data objects can vary. It is OK to deviate in the details.**

Create template with 4 different “dialog” groups

1. Subjective
2. Objective
3. Assessment
4. Plan

At the beginning of the template:

1. Name the template

2. Pull in patient information (name, MRN, DOB, etc) objects

Within subjective

1. Add text box for subjective information
2. Pull in family history objects
3. Add template fields for Review of systems

Within Objective

1. Add text box for generic free text information
2. Pull in a medication data object
3. Pull in vital data object
4. Pull in lab data object

Within Assessment

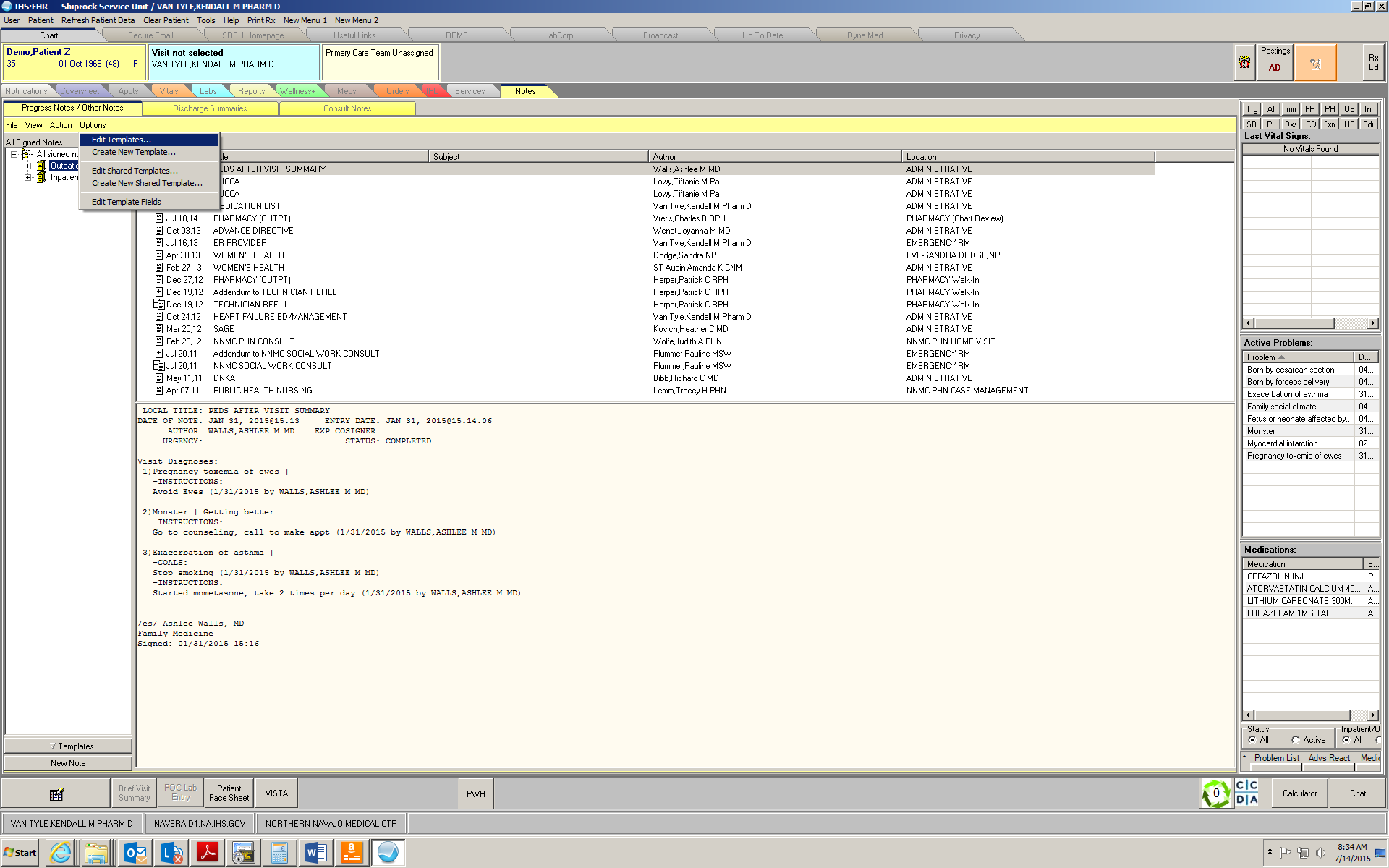
1. Add text box for assessment documentation

Within Plan

1. Add text box for plan
2. Pull in date box or drop down for follow up plan

**Open The template editing functions:**

**Step 1**: navigate to the “NOTES” tab. **Step 2**: Navigate to the “OPTIONS”. **Step 3**: Select “EDIT TEMPLATES” from the drop-down menu



**Steps 2 & 3: “Options”; “Edit Templates”**

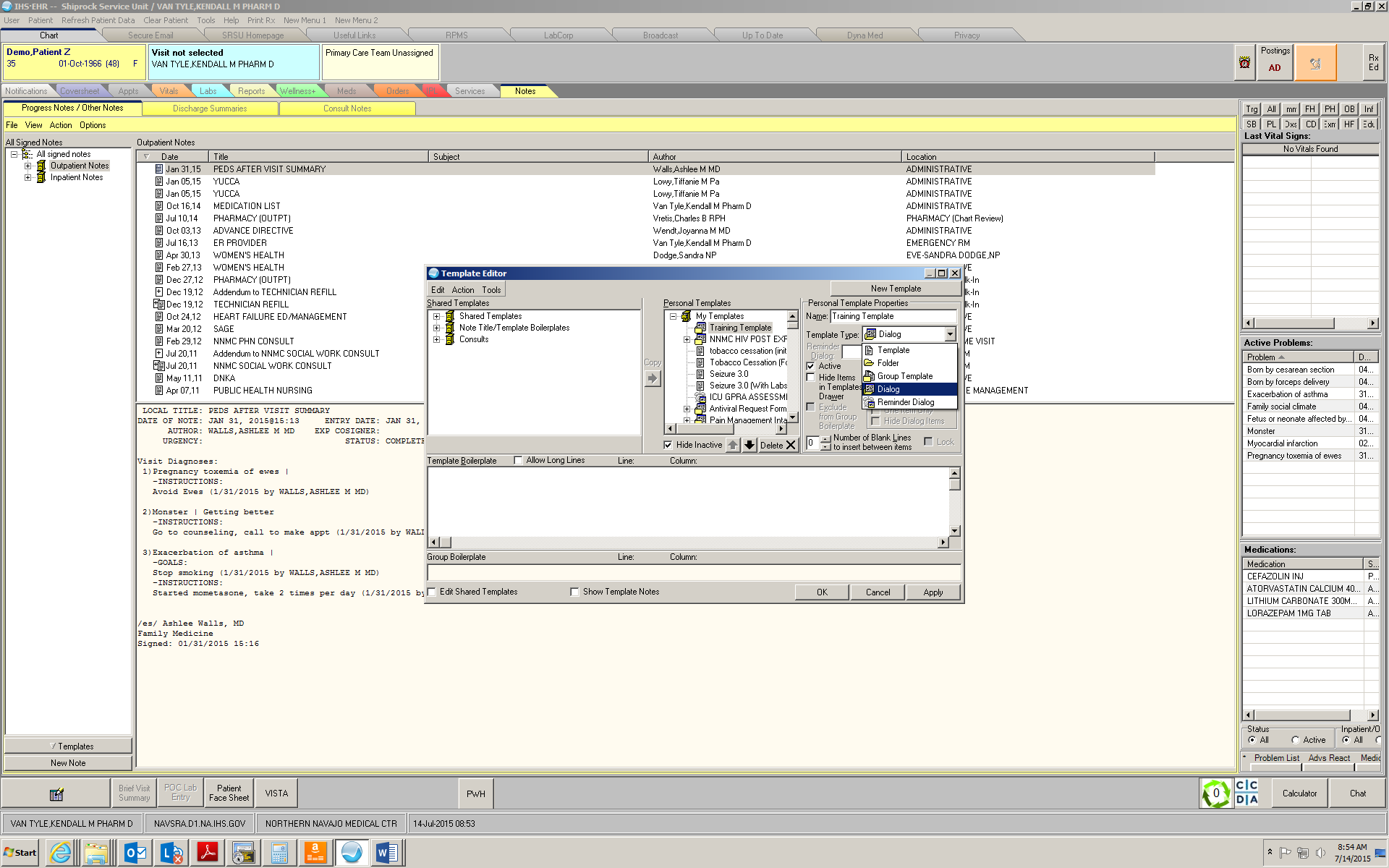
**Step 1: “Notes” Tab**

**Create a new template:**

**Step 1**: Navigate to “My Templates”. **Step 2**: Create a new template. **Step 3**: Name the template “Training Template”. **Step 4**: Change the template type to “Dialog” – this will allow us to house other templates within this heading of “Training Template”:

**Step**

**3**



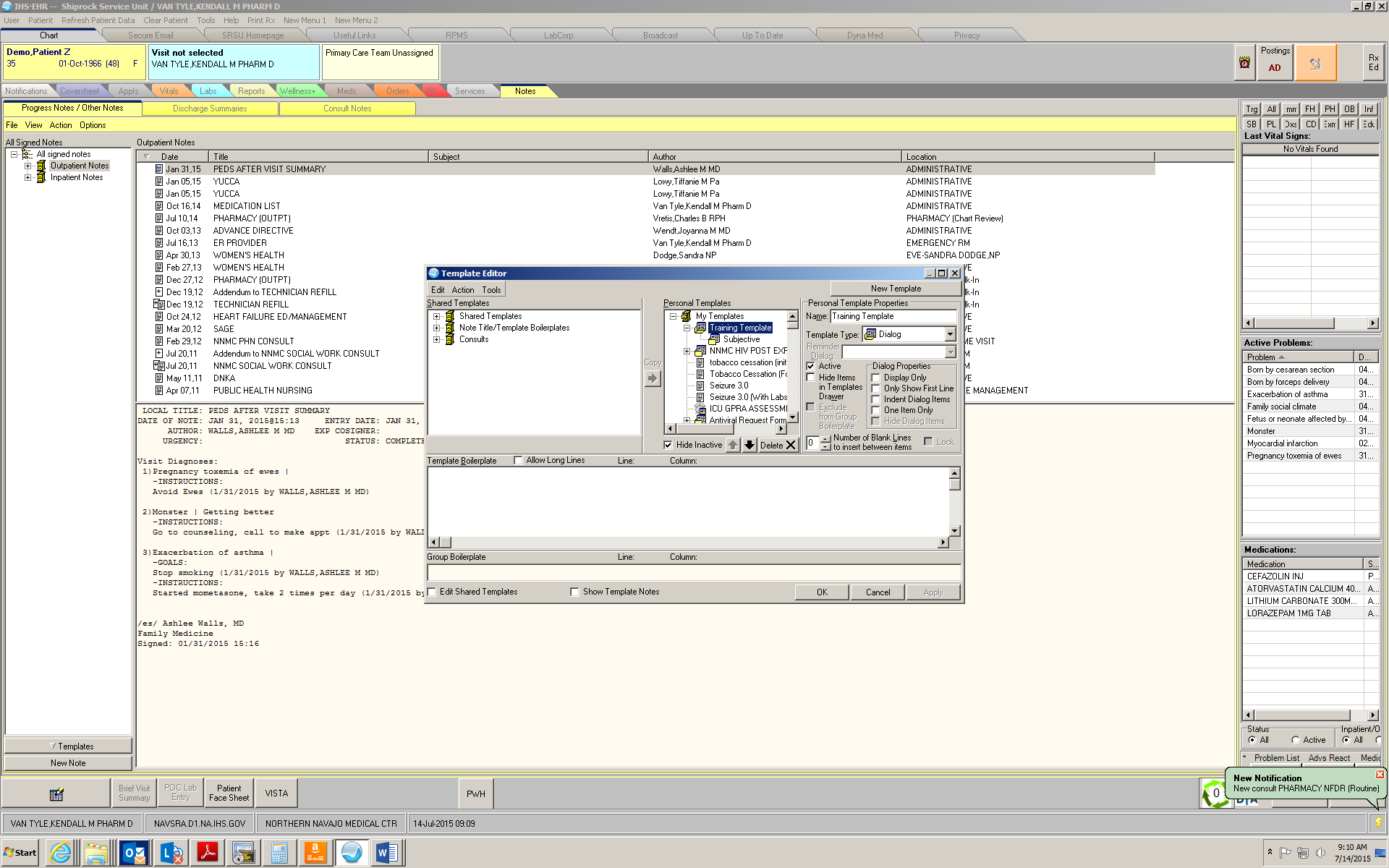
**Step 4**

**Step 2**

**Step 1**

**Create “Sub-Templates” housed within your “Training Template”:**

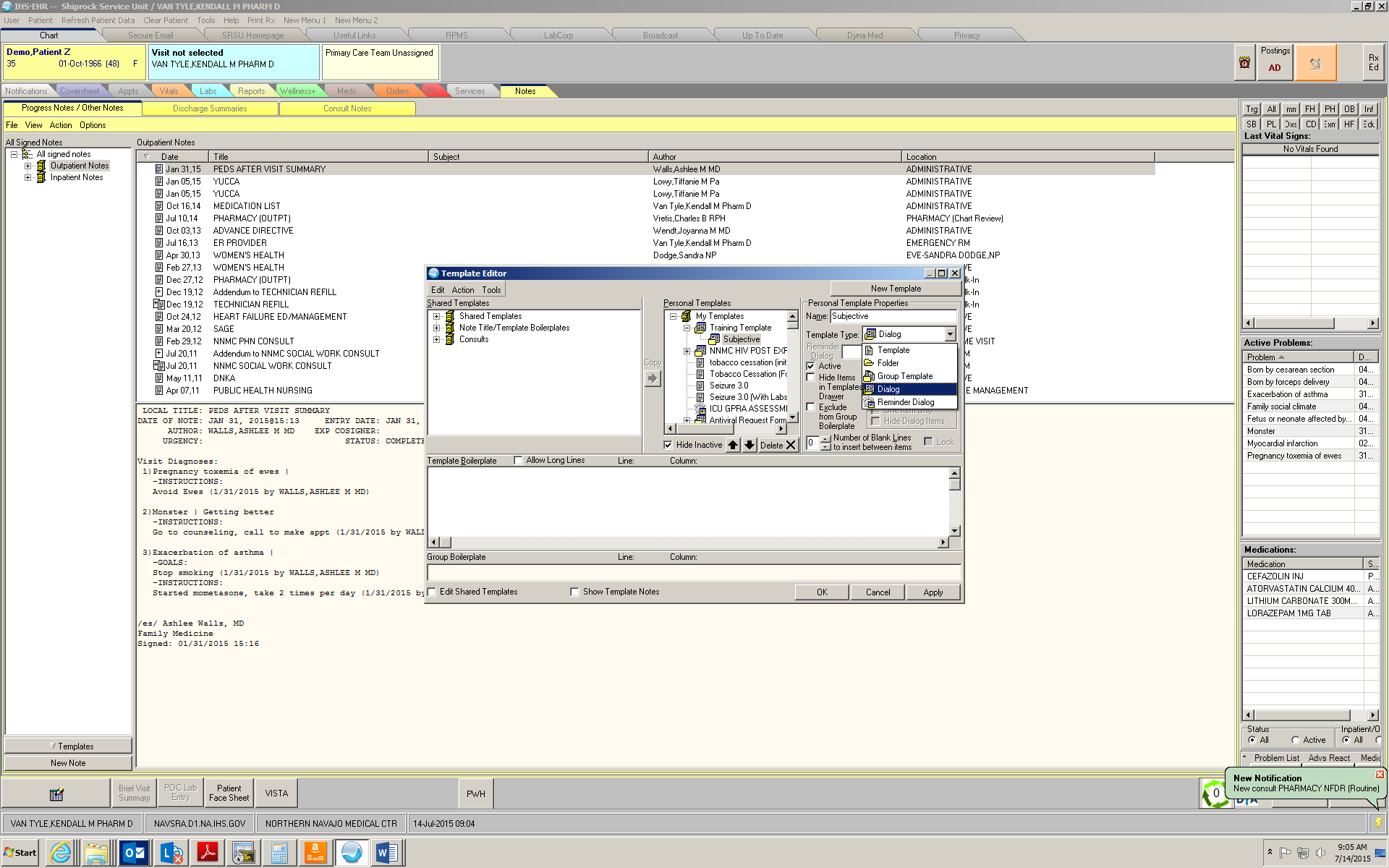
**Step 1**: Highlight your “Training Template . **Step 2**: Create a new template. **Step 3**: Name the template “Subjective”. **Step 4**: Change the template type to “Dialog” – this will allow us to house other templates within this heading of “Subjective”



**Step**

**3**

**Step 1**



**Step 4**

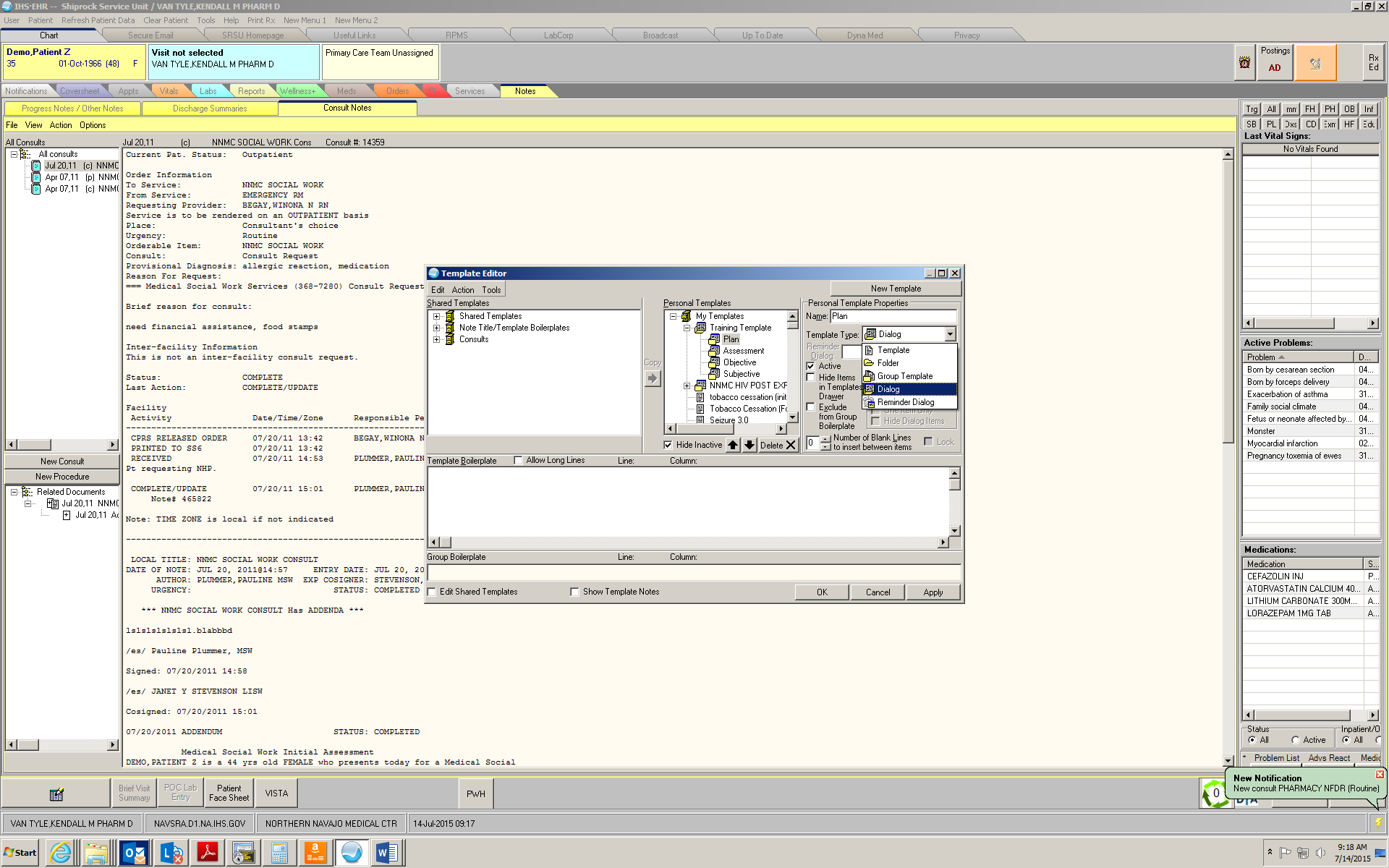
**Step 2**

**Create “Sub-Templates” – Repeat for “Objective”, “Assessment”, and “Plan”:**

**Step 1**: Highlight your “Training Template” . **Step 2**: Create a new template. **Step 3**: Name the template “Objective”. **Step 4**: Change the template type to “Dialog” – this will allow us to house other templates within this heading of “Objective”

**Step**

**3**



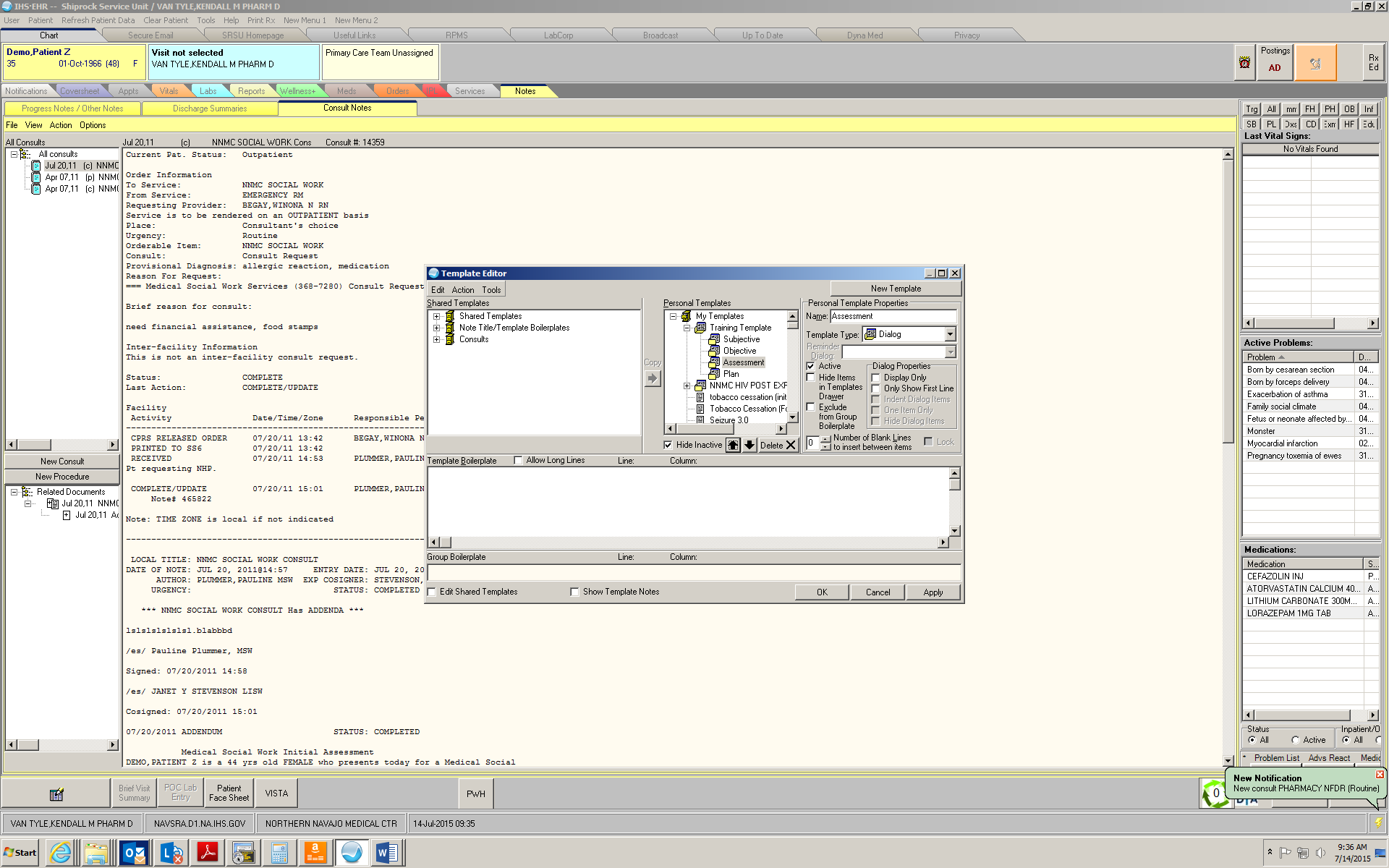
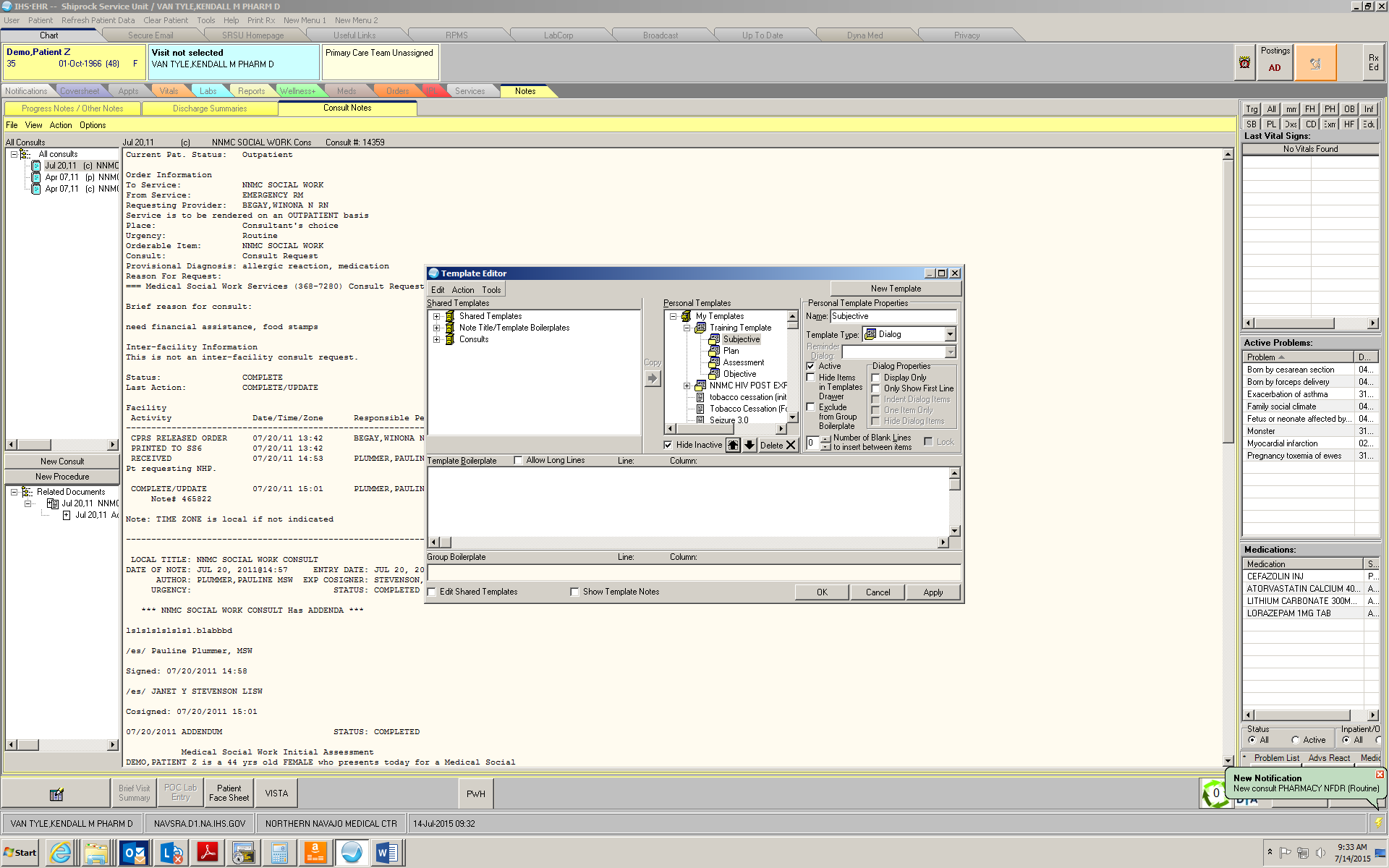
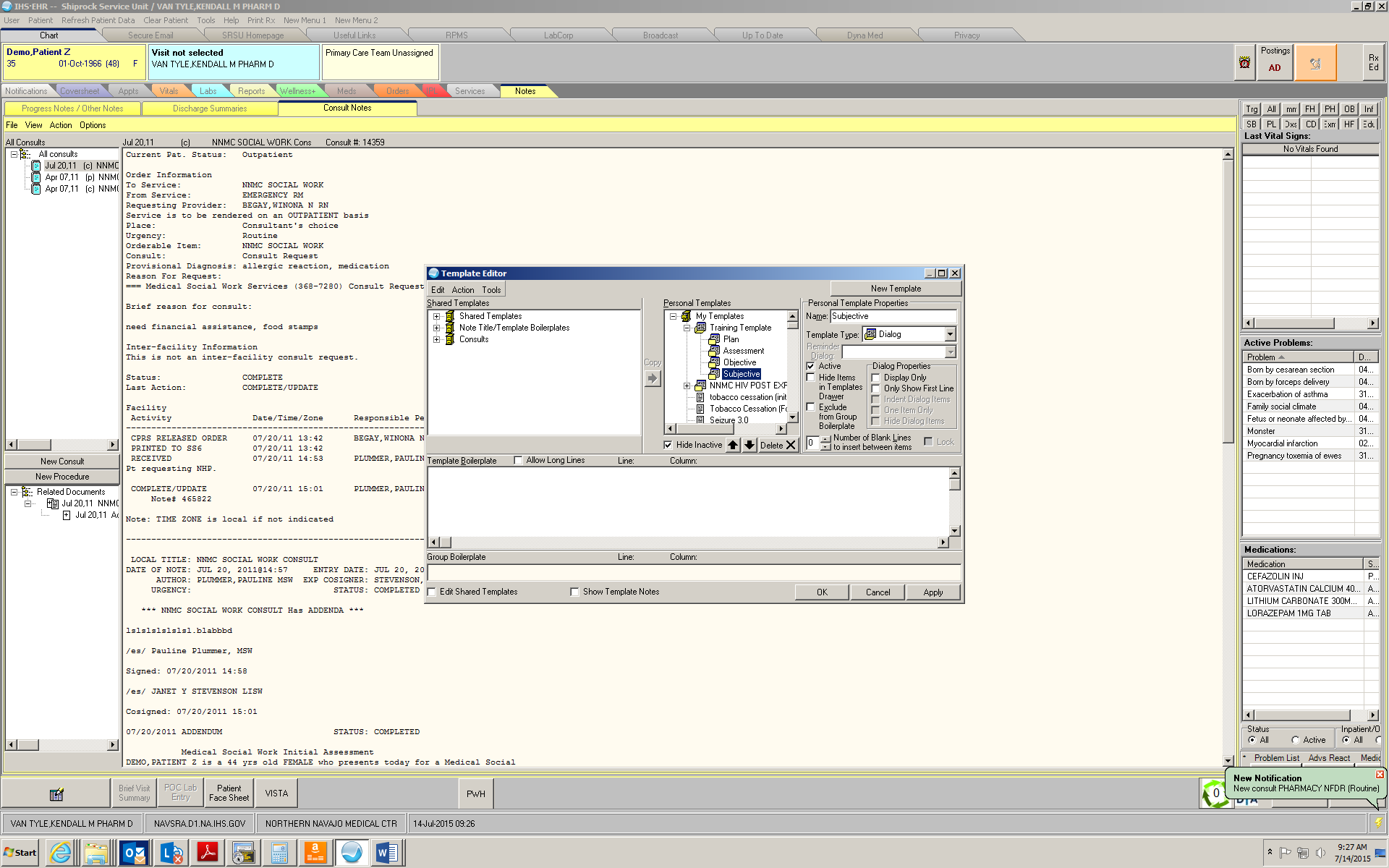
**Step 4**

**Step 2**

**Step 1**

**Re-order your “sub-templates”:**  Notice your “sub-templates” are not in the correct order

**Step 1**: Highlight the template you want to move “Subjective” . **Step 2**: Use the arrows. Repeat until all of your templates are in the desired order



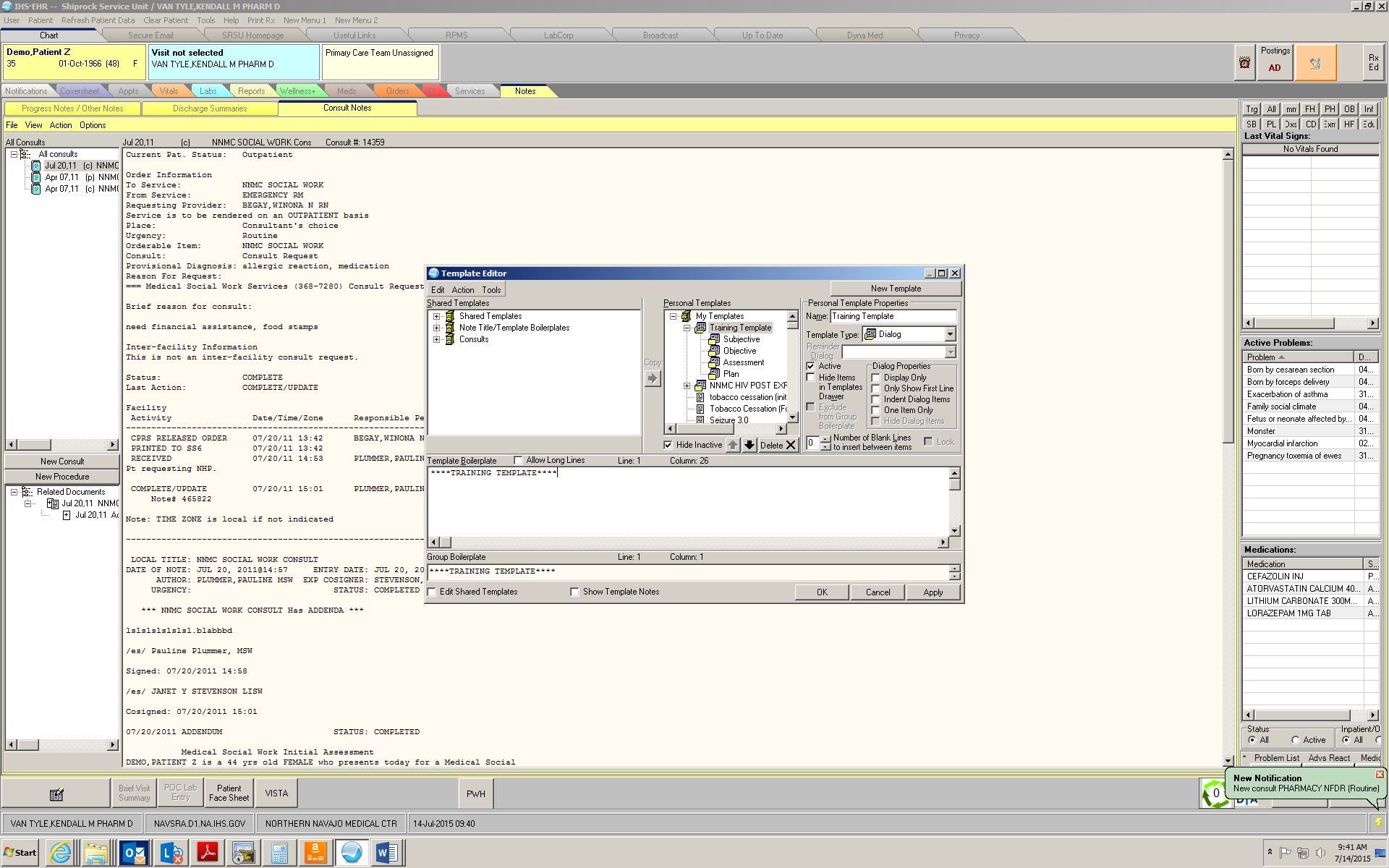
**“Subjective” is now the first “sub-template” you have**

**Step 2**

**Step 1**

**Begin to Add Text and Elements:**  All we have done so far is create a “back-bone” for our template. We need to now start filling in text; data objects and template fields.

**Step 1**: Highlight the template you want to add things to. Lets start by adding a title or heading to each template. So highlight “Training Template”. **Step 2**: Type in the words “\*\*\*\*Training Template\*\*\*\*”, repeat for “Subjective”, “Objective”, “Assessment” and “Plan”.

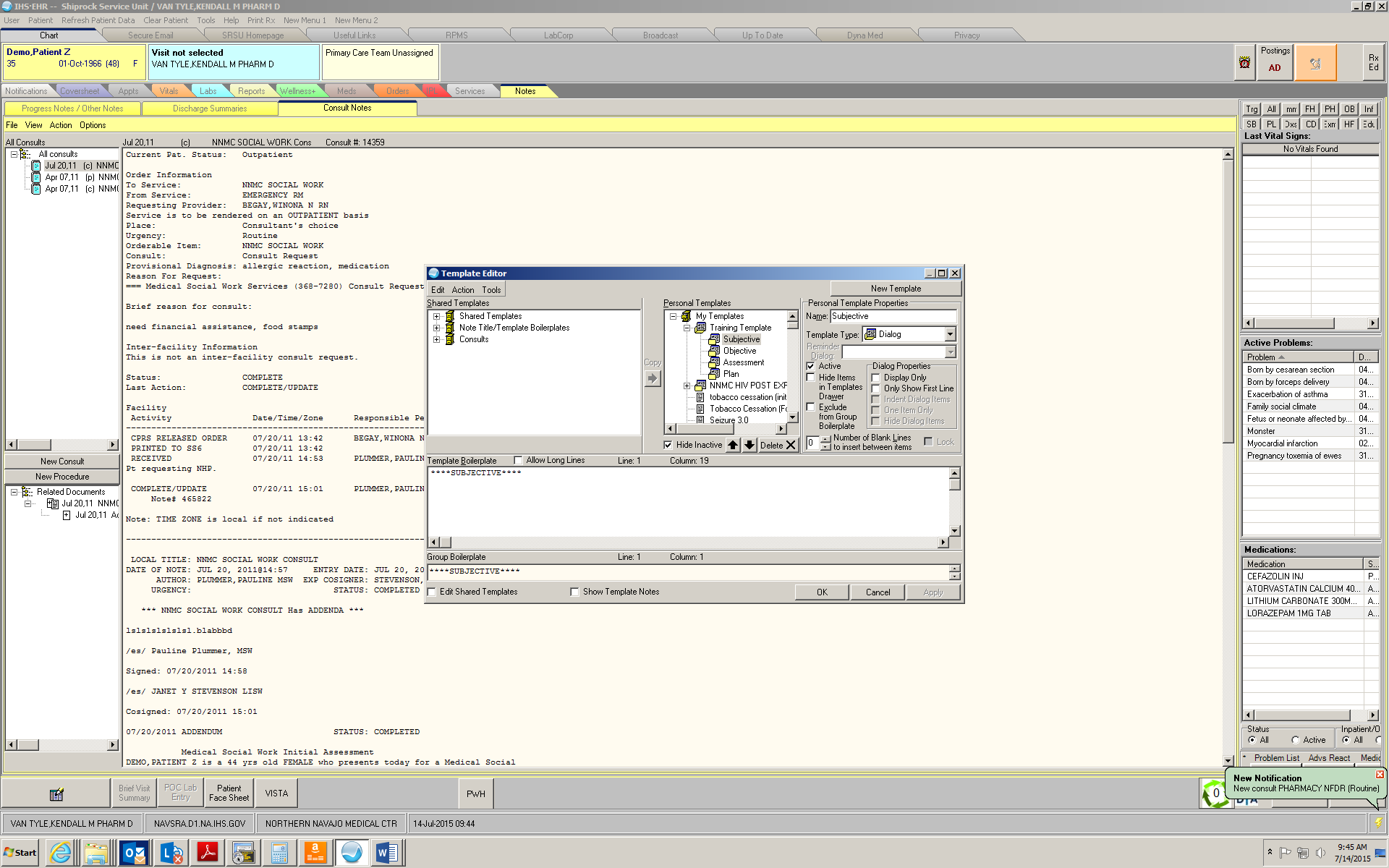


**Step 2**

**Step 1**

**Begin to Add Text and Elements:**  All we have done so far is create a “back-bone” for our template. We need to now start filling in text; data objects and template fields.

**Step 1**: Highlight the template you want to add things to. Lets start by adding a title or heading to each template. So highlight “Subjective”. **Step 2**: Type in the words “\*\*\*\*Subjective\*\*\*\*”, repeat for “Objective”, “Assessment” and “Plan”.

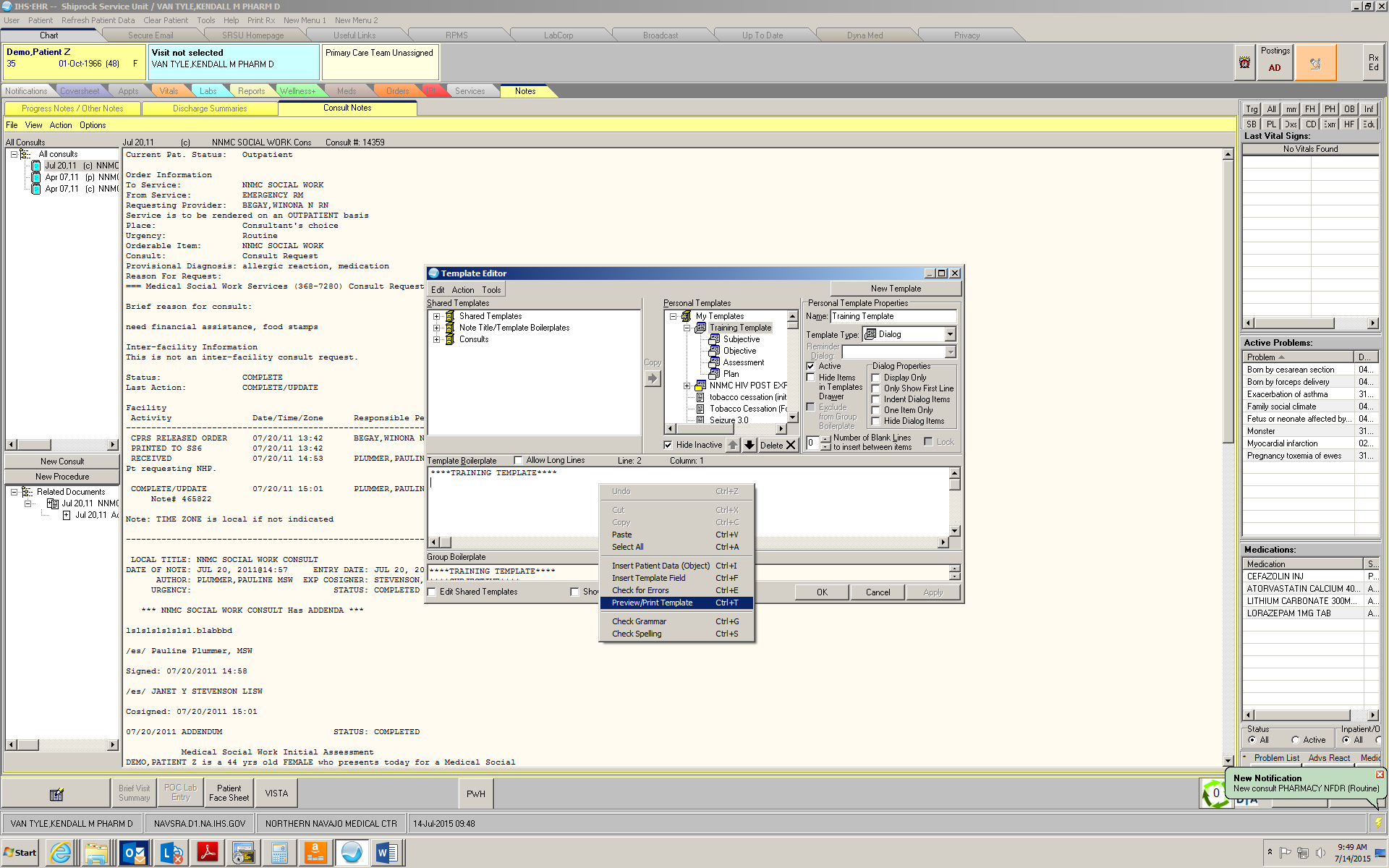


**Step 2**

**Step 1**

**Preview what we have so far:**

**Step 1**: Highlight the “level” you want to preview. Lets preview the entire template so far. So highlight “Training Template”. **Step 2**: Right-click and select “Preview/Print Template”.

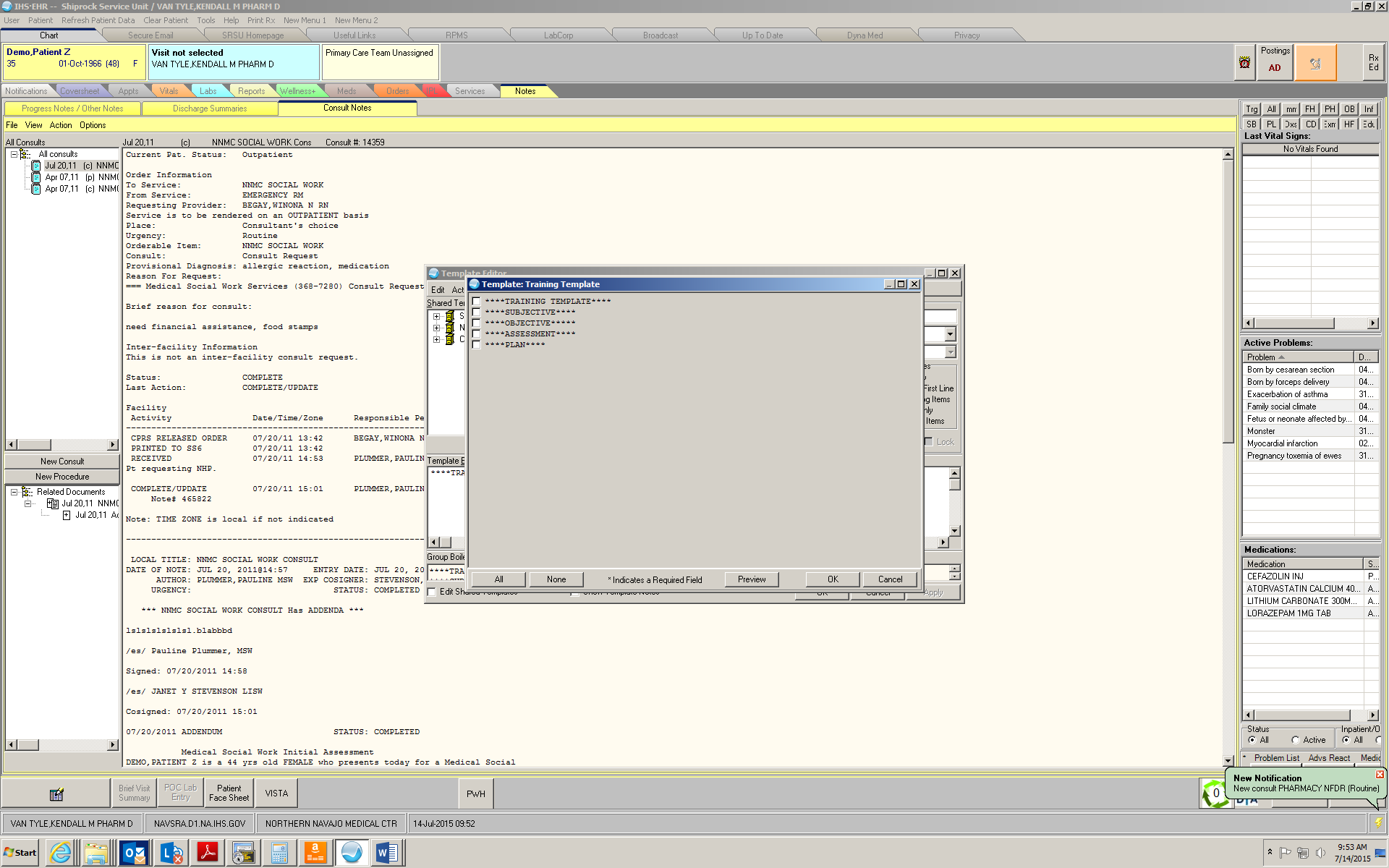


**Step 2**

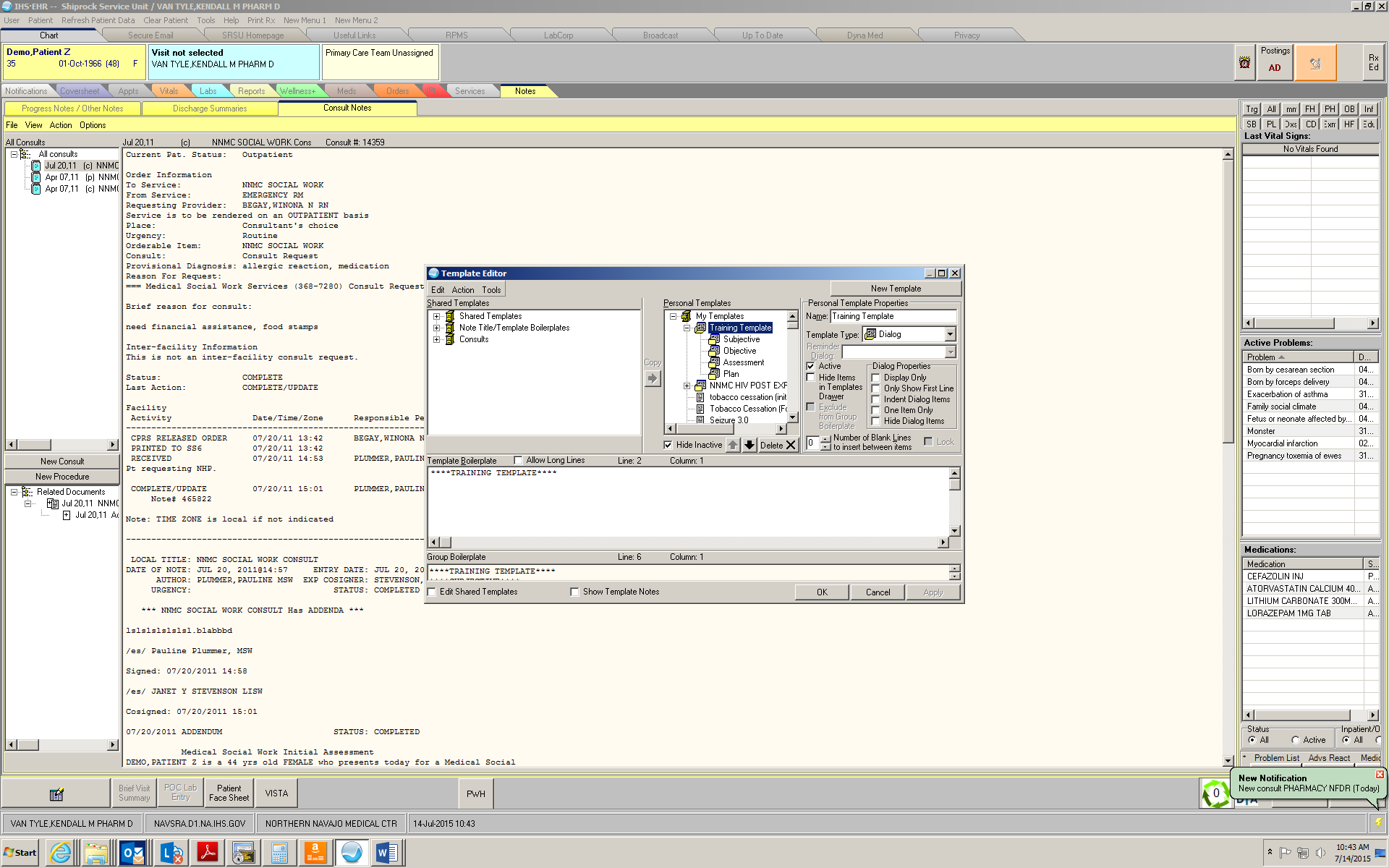
**Step 1**

**Preview what we have so far:**

Notice – we are building a very “click-driven” template with many elements “nested” within each other.



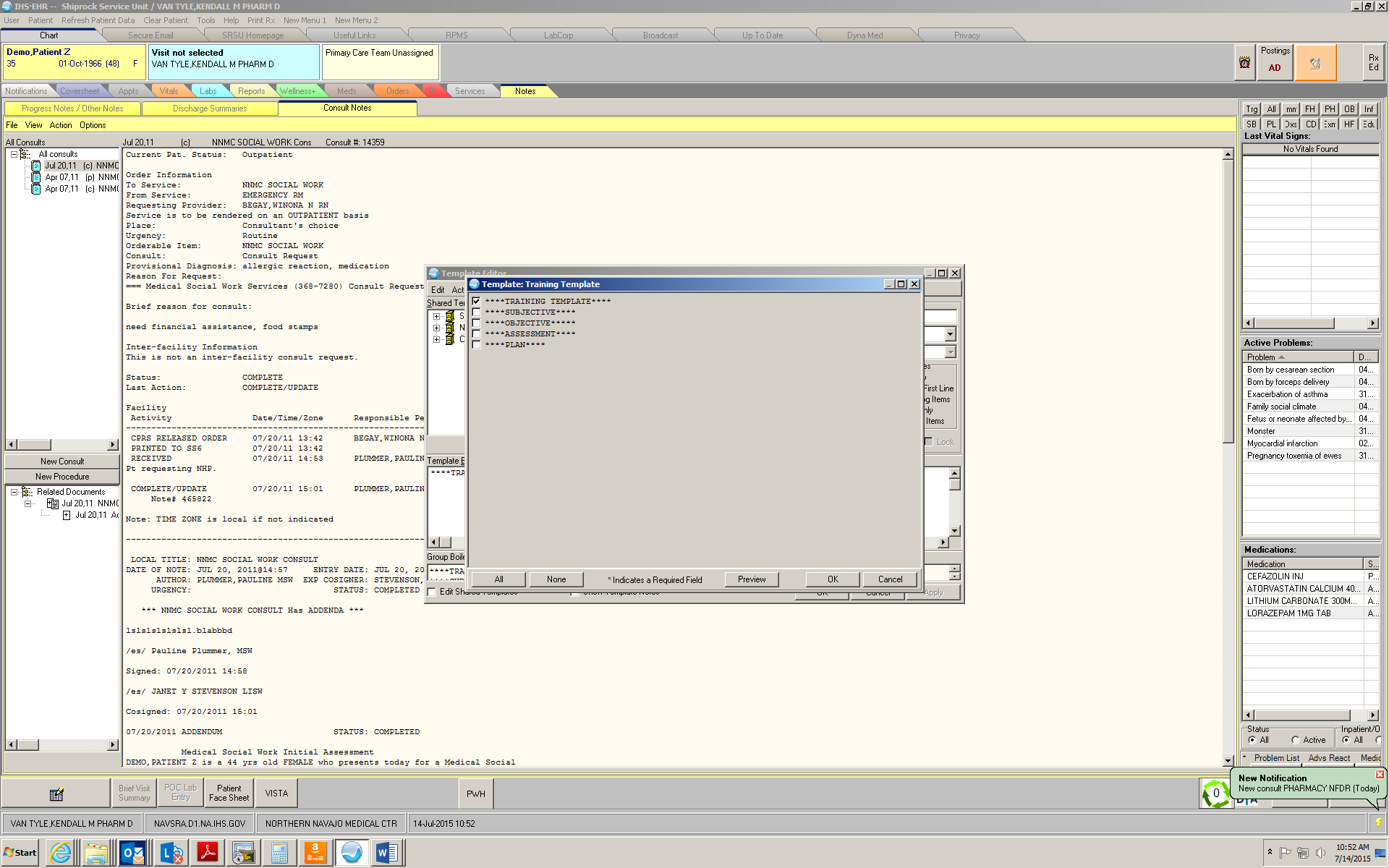
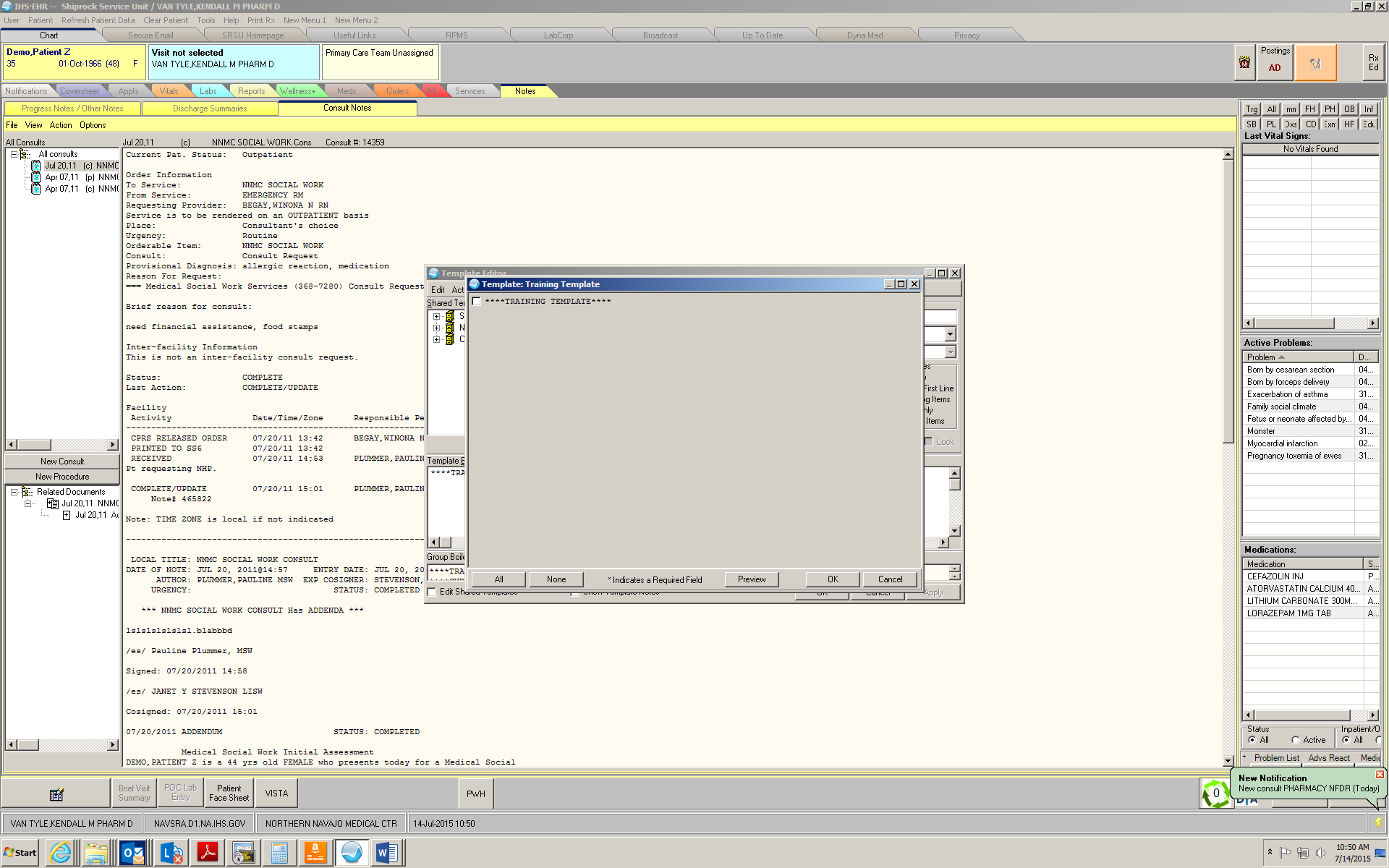
**Note “Dialog Properties”:**  Select the template you want these properties to apply to. My best advice is to play with these and note how they effect the view and functioning of the template. By Clicking “hide dialogue items” for example, this will keep all “sub-templates” hidden until the level above it is checked.



**Step 2**

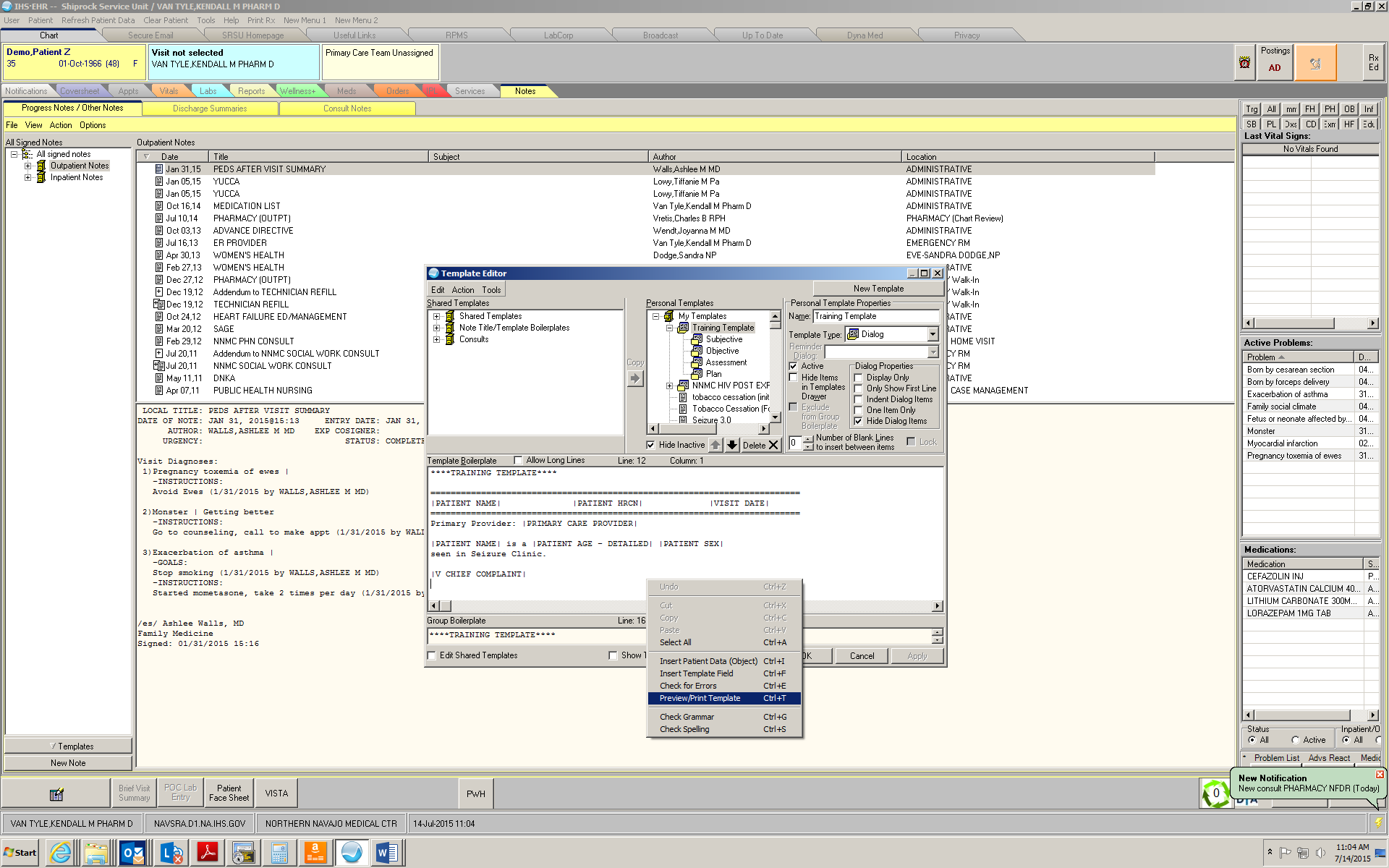
**Step 1**

**Preview effects of “Dialog Properties”:**  Example is “hide dialog items”. Note how now, all of the other “sub templates” are not visible, only the highest level, in this case our master “Training Template”. Once clicked, all the other items will appear.



**All of our other “sub-templates” are now visible**

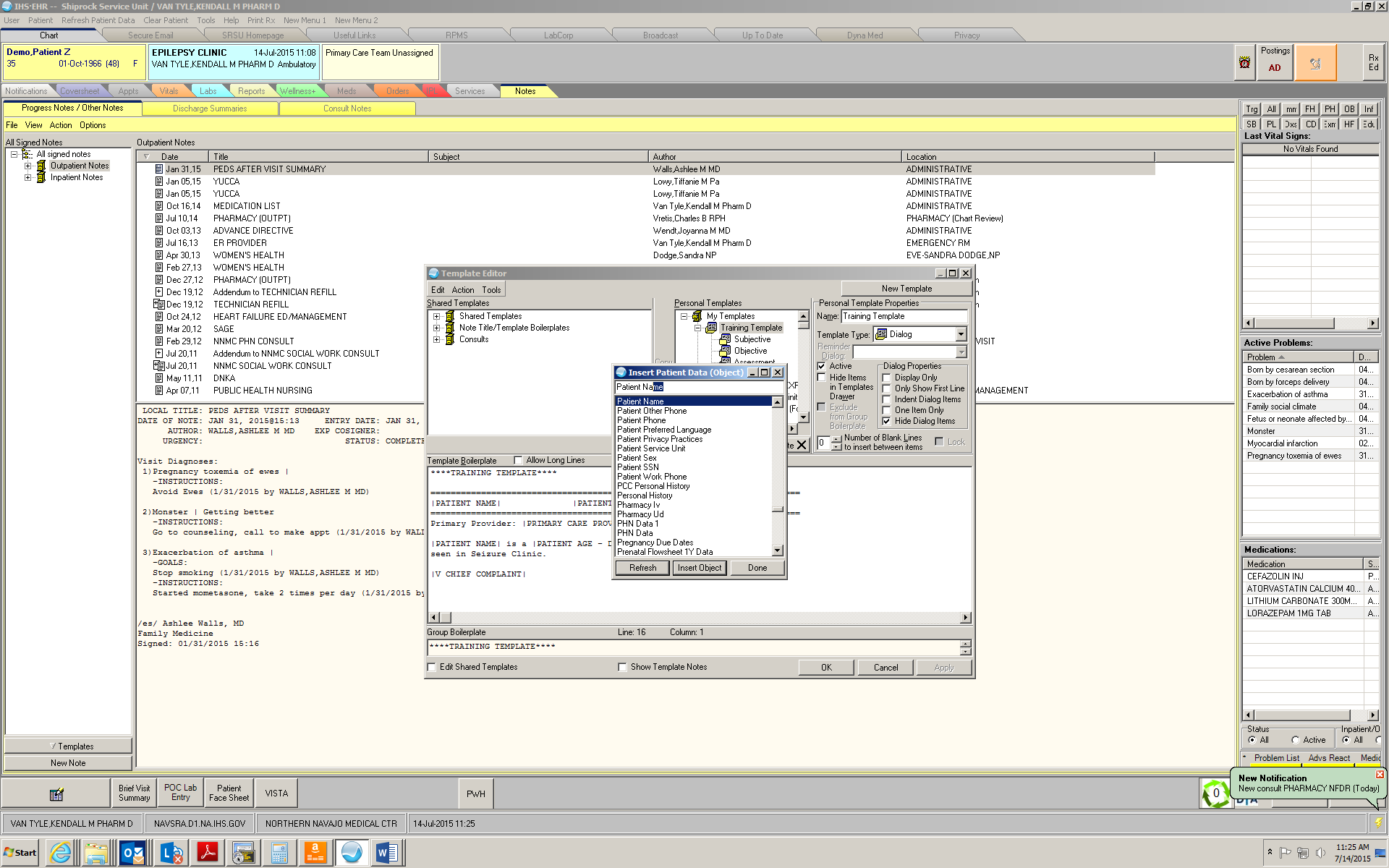
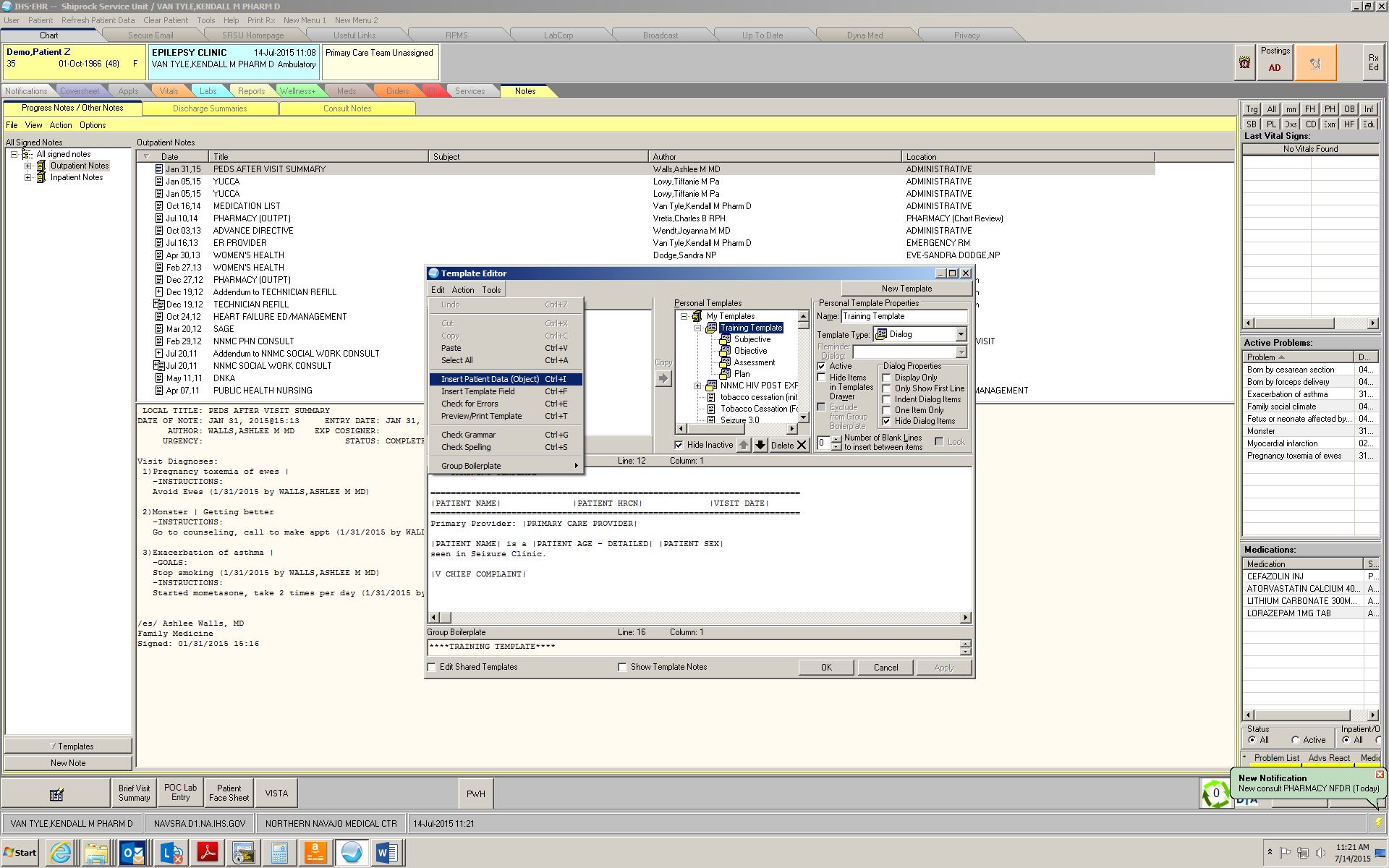
**Populate our “Header”:**  It is good to think of everything you populate under your highest level template, in this case “Training Template”, as a header of sorts. This information will come in right at the beginning. Things like patient information, etc. Let’s populate some patient specific information under our template “Training Template”. There are many “Patient Data Objects”, combined with text populated below as an example of what can be done. We will cover the mechanics of adding a “Patient Data Object” next. Any thing with the format…. |PATIENT DATA OBJECT|…..below will pull information from RPMS for the patient you are writing the note on automatically.



**Preview our “Header”:**



**How to populate a “PATIENT DATA OBJECT” (Or template field!):**  **Step 1**: Highlight your “Training Template” . **Step 2**: Navigate to “EDIT” **Step 3**: Select “INSERT PATIENT DATA (object). **Step 4**: Search for and select what you want….NOTE – trial and error will likely need to be done to find exactly what you want; preview, delete and re-select another if needed.



**Step 3**

**Step 4**

**Step 2**

**Step 1**

**Populate other sub-templates:**  All of the above steps can be repeated as needed, simply select the template you want to add things under, and use combinations of 1) Text, 2) Patient Data Objects, 3) Template Fields or 4) Other templates - to create the structure and content you want. You can add spacing, etc. Again, the best advice here is constantly preview, delete and re-insert different objects/template fields/templates as needed - add formatting and playing with “dialog properties” until your template looks and functions as you want it to. Again, it is easy to get the content, more time consuming to get it to look and function exactly how you want it too, so have fun with it.