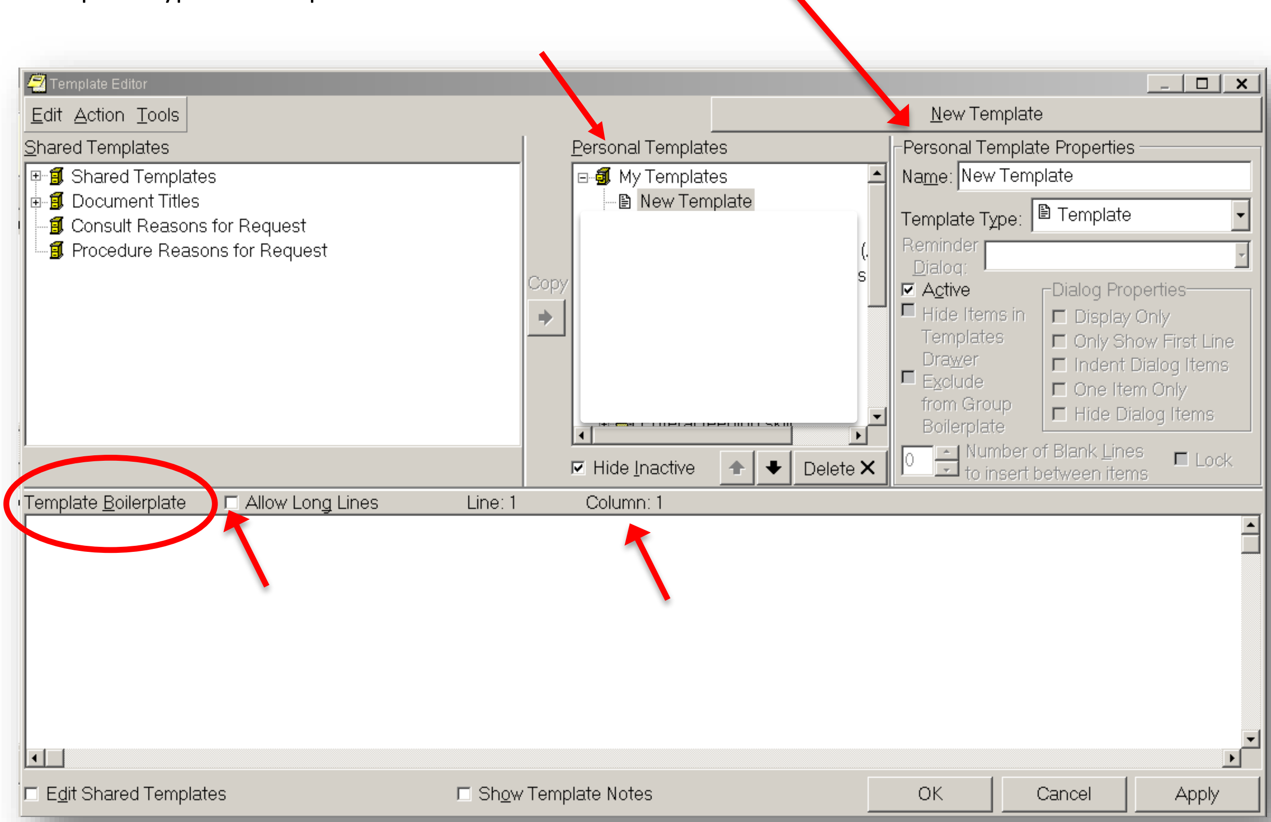
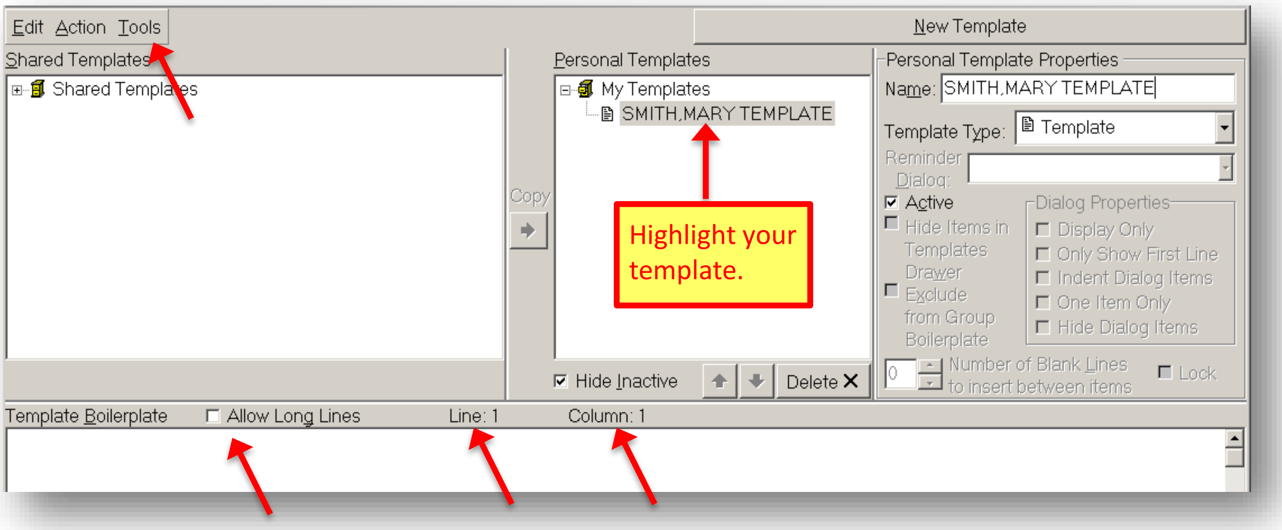
Quick Guide to Creating a Template (By a Student)

Launch the EHR and open your portfolio chart, or the chart designated by the instructor. Go to the **Notes** tab > **Options > Create New Template**. The Template Editor screen will open.

In the **Personal Templates** window highlight **My Templates,** then in the **Name** field to the right, *type in the title of your template;* You will want the NAME to provide quick personal identification for your work. Leave the Template Type as "Template."



The Name you just entered will now show in **Personal Templates > My Templates.** This will be a simple template, not unfolding. Click on **Apply**. Now create the template in the Template Boilerplate window on the bottom. **Highlight** the Name of your template in the Personal Templates window to get started.



Tips to remember when creating a template

- In the EHR, you can use the step-by-step comprehensive Help tool by clicking on the **Help** menu **> Index >** and then typing in "Template."
- You are only allowed so many characters across (horizontally) – the maximum is about 80. Look at the "Column:" to know where you are at. You may click **Allow Long Lines** to reach the 80 character limit.
- There is no bolding, underlining, or italics like in a Word document.
- To underline or add a divider, use repeated dashed, equal signs, or asterisks (------ , ===== , ******). Look at other templates to see how these symbols are used.
- Click on **Apply** frequently to save work. If you click **OK** or **Cancel** and have not saved your work it will be lost.
- You can copy and paste text from another document or from within the Template Boilerplate.
- In the **Tools** Menu of the Template Editor you are able to Create and Edit Template Fields.
- It is proper EHR etiquette to not look at or change other users work in the EHR. In the Shared Templates folder to the left you are able to see other templates that are being worked on or are "under construction." Do not edit or work on any template other than your own.

1. Begin creating the template by typing in the Boilerplate area the labels for your data fields. Use all caps to enter text into the template just as it's shown on the next page. Notice as you enter the information how the 'Line' and 'Column' numbers change.
   Tip: *The template must be highlighted in order for you to document in the Template Boilerplate*.

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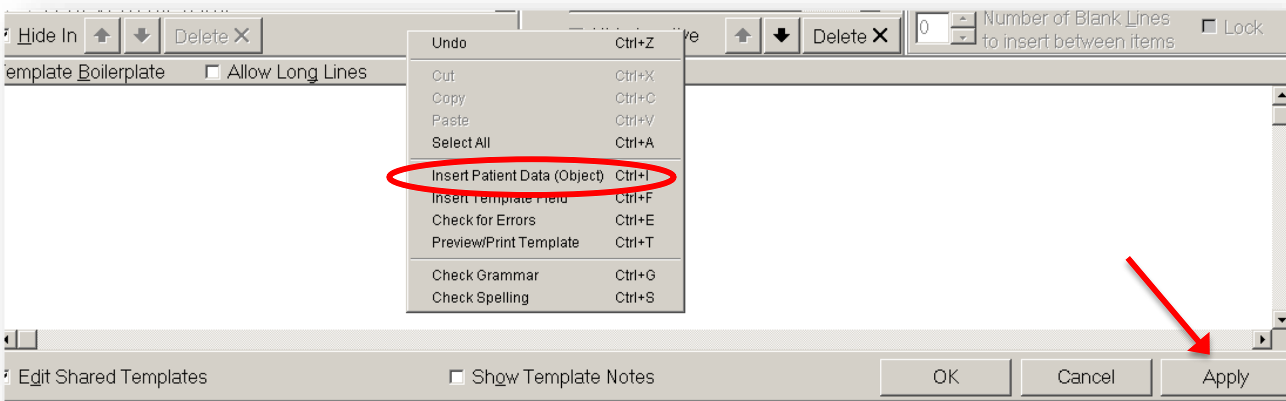
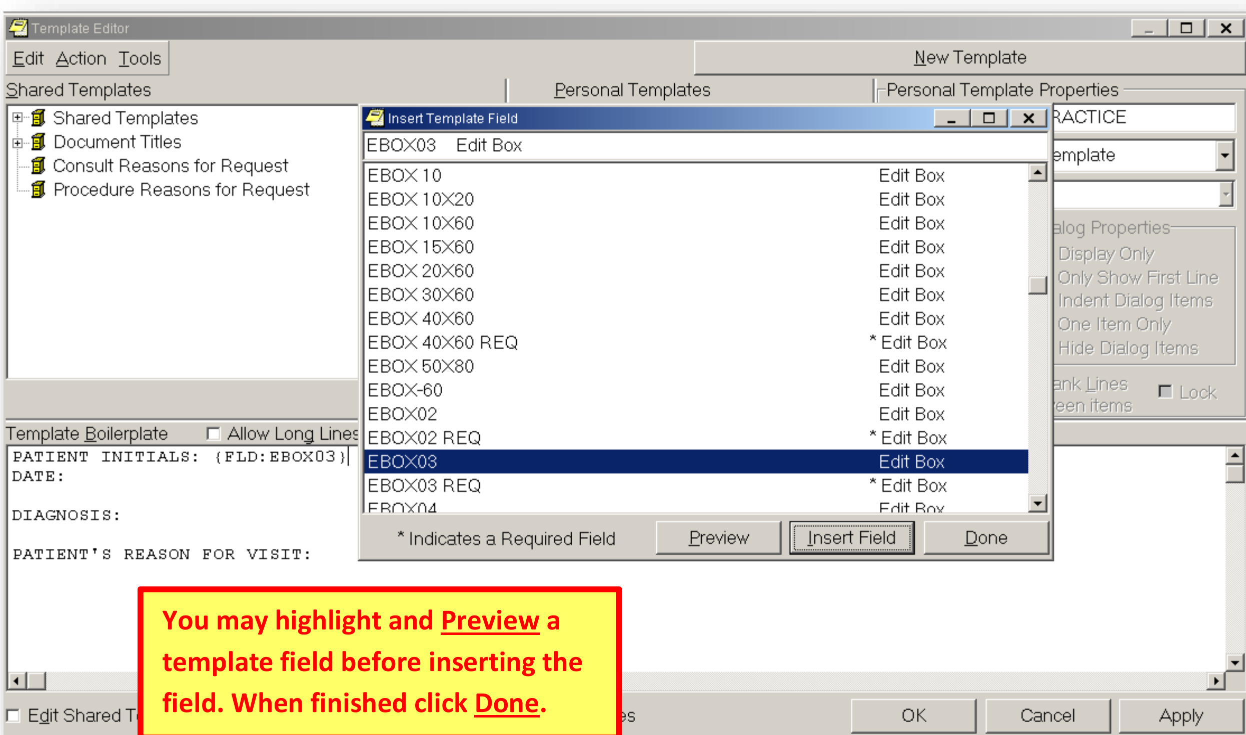
Move the cursor to locate the spot for the next label. Possible label examples include:

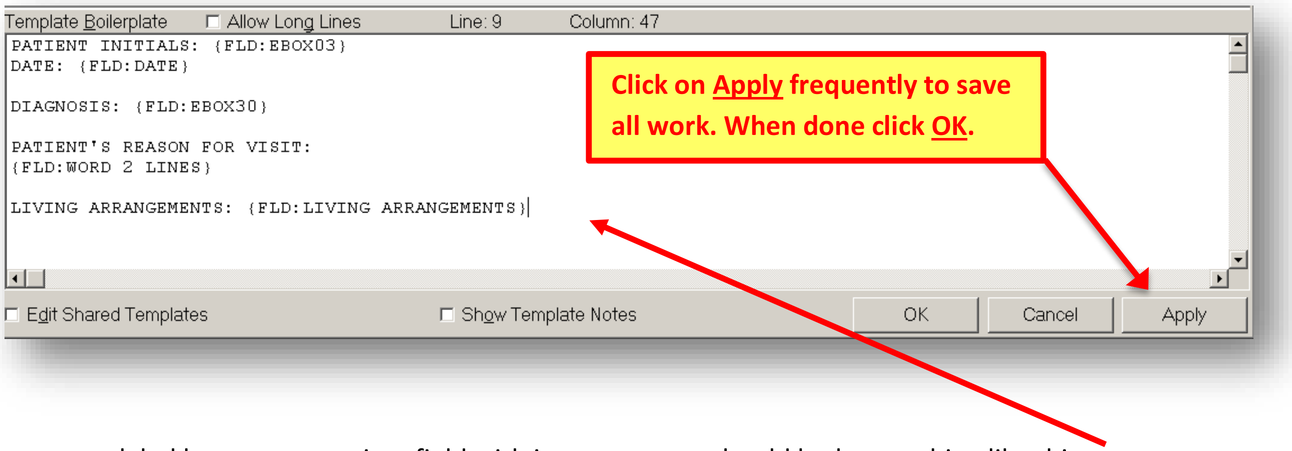
- PATIENT INITIALS:
- DATE:
- DIAGNOSIS:

With the cursor on blank space in the Template Boilerplate, to the right of your first label, right click to view the list of actions that are available. Highlight *Insert Template Field* to bring up a list of available existing fields. Type EBOX in the top field to see the list of fields beginning with EBOX.

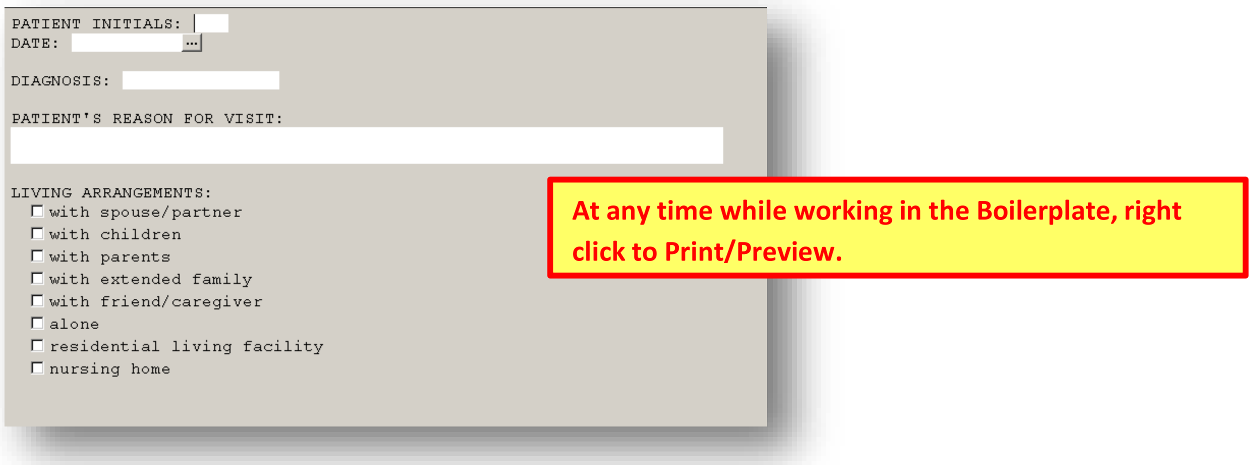


Before inserting a Template Field you can **Preview** it. Template fields allow you to create text edit boxes and to create lists of text that can be selected via combo boxes, buttons, check boxes, or radio buttons.



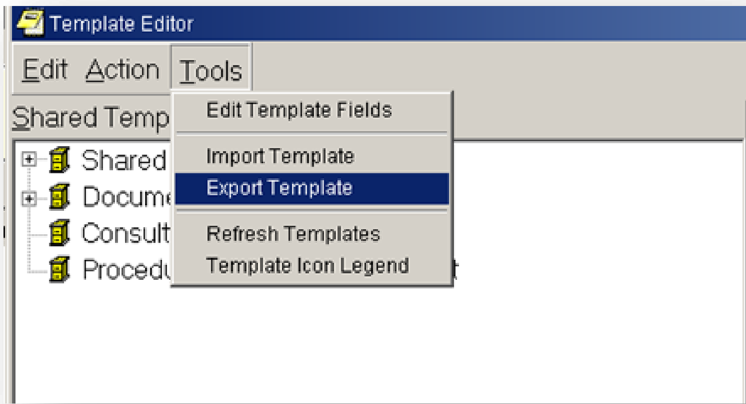


When every label has an appropriate field with it, your screen should look something like this

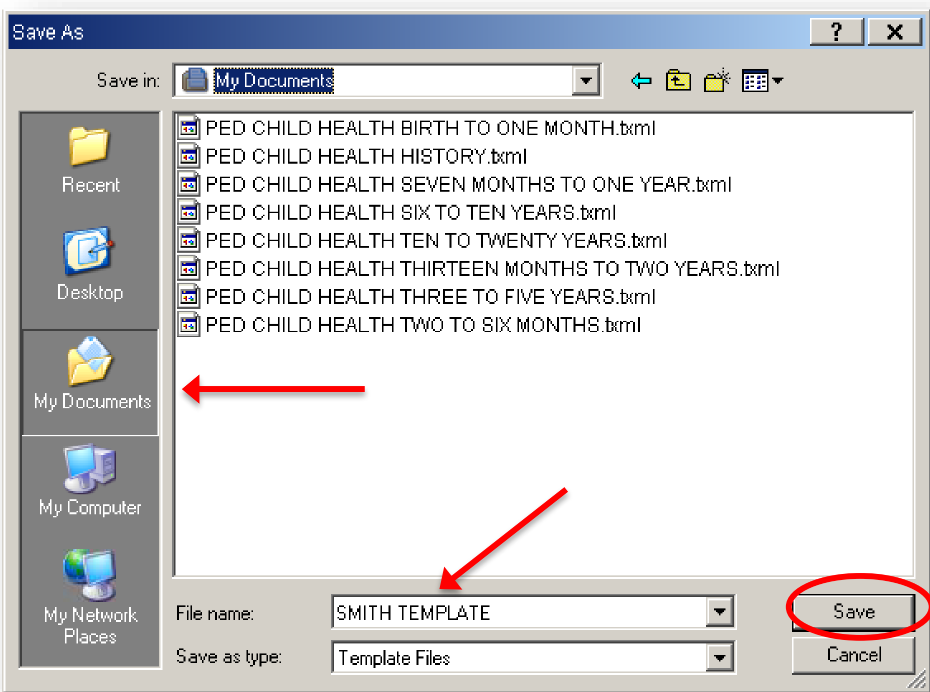


At any time, you may use the step-by-step comprehensive Help tool by clicking on the **Help** menu **> Index >** and then typing in “Template.”

When completed with the template, **submit your work to your instructor**. This is done by saving your template on the EHR server. While still in the Template Editor, click on **Tools > Export Template**. Save the template in **My Documents** on the server. Make certain the template Name will be identifiable by your instructor.

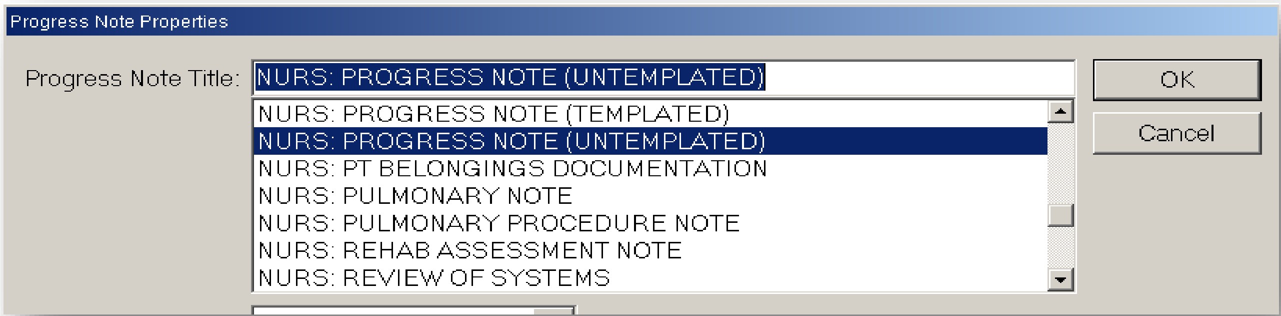


Click **Save**.

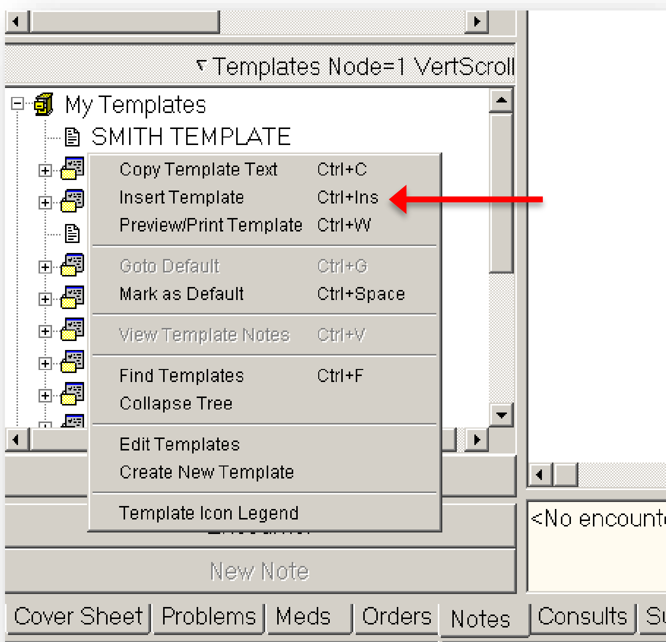


To use your template and document a note

Close the Template Editor and go to the Notes tab. First, open a blank note by clicking on **New Note >** type in "**NURS: PROGRESS NOTE**" **>** choose the progress note that is **UNTEMPLATED**. Select a co-signer and click **OK**. A blank progress note will open.



Then, click on **Templates > My Templates >** highlight the template that you just created **>** right click **> Insert Template >** your template will appear in the right windowpane where the blank progress note was opened.



When done documenting, you will sign your note.

Screen displays may vary among different sites and you may not see the data on your monitor exactly as shown in this manual. Although screens are subject to modification, the major menu options and workflow can be followed from this manual. Please contact support if you need assistance in following this manual.