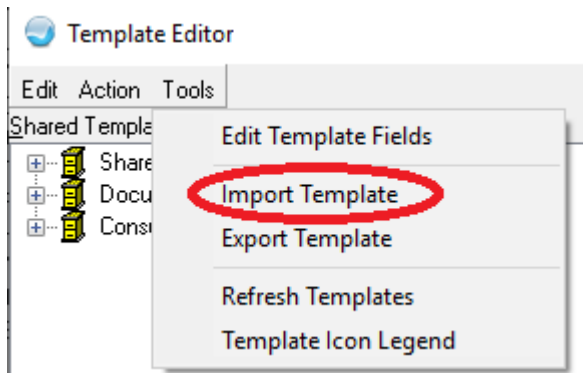


Note Template Import Instructions

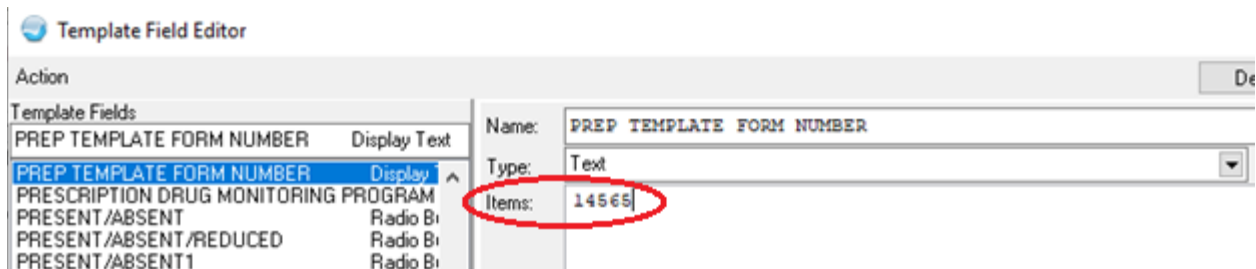
Step 1:

Have an informaticist who has the CLINICAL COORDINATOR user class import the template(s).

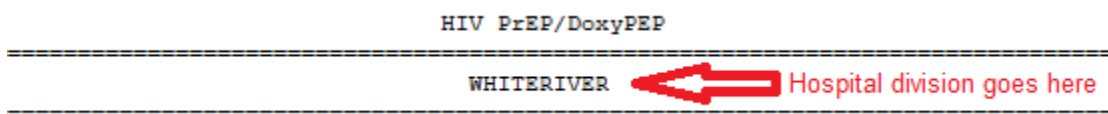


Step 2:

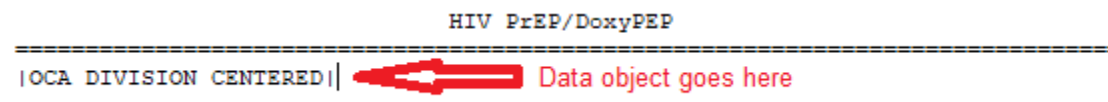
Take note of the template field at the very top of the note (e.g. PREP TEMPLATE FORM NUMBER). Edit the template field in Tools -> Edit Template Fields and edit the "Items" section to reflect your HIM approved form number.



Step 3: Add your hospital division to the near the top of the note template.



Step 3 (alternative option): An informaticist with experience could create a data object that automatically populates the service unit division.



The OCA DIVISION CENTERED data object was created by Oklahoma Area Office and uses the following object method to automatically populate and center the division name:

```
S BZOD=$O(^DG(40.8,"AD",DUZ(2),0)),X=$$CJ^XLFSR($P($G(^DG(40.8,BZOD,0)),U),76)
```

Step 4:


Add your local data objects where indicated in the note template:

BEFORE:

```
=====
                                OBJECTIVE
=====

Vitals:
BP: |LAST BP|
Pulse: |LAST PULSE|

Laboratory data:
{LAST HEPATITIS PANEL} OR SIMILAR DATA OBJECT
{LAST HIV} OR SIMILAR DATA OBJECT
{LAST CBC} OR SIMILAR DATA OBJECT
{LAST CMP} OR SIMILAR DATA OBJECT
{LAST LIPID PANEL} OR SIMILAR DATA OBJECT
{LAST LAB SYPHILIS} OR SIMILAR DATA OBJECT
{LAST URINE TRICH} OR SIMILAR DATA OBJECT
{LAST GC/CHLA URINE} OR SIMILAR DATA OBJECT
{LAST GC/CHLA RECTAL} OR SIMILAR DATA OBJECT
{LAST GC/CHLA PHARYNGEAL} OR SIMILAR DATA OBJECT
{LAST URINE HCG} OR SIMILAR DATA OBJECT
```



Replace these with your
local data objects

AFTER (example):

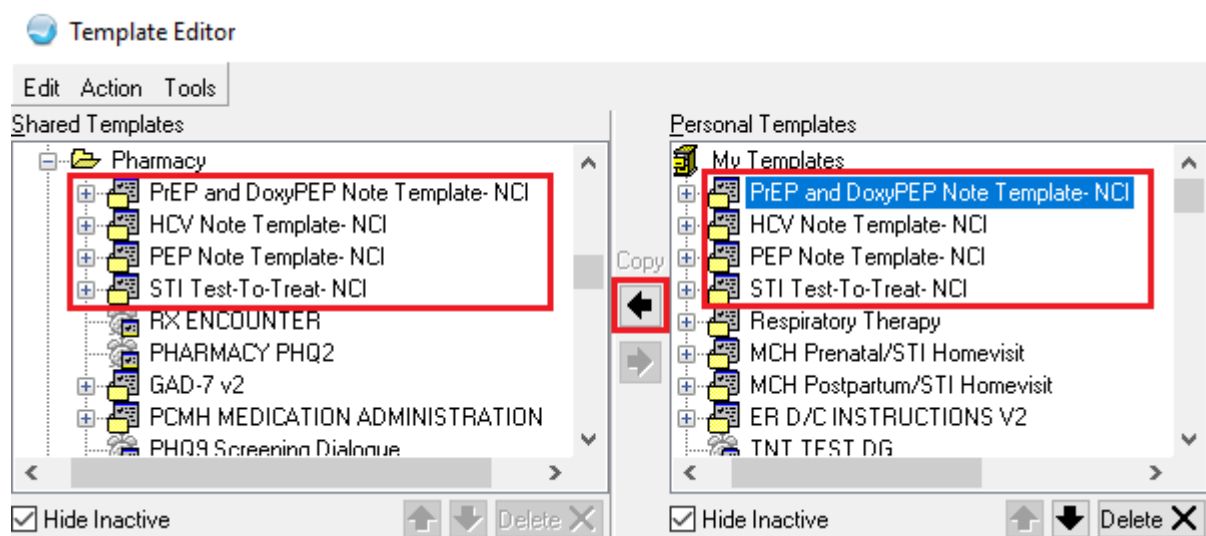
```
=====
                                OBJECTIVE
=====

Vitals:
BP: |LAST BP|
Pulse: |LAST PULSE|

Laboratory data:
|LAST HEPATITIS PANEL|
|LAST HIV|
|LAST CBC|
|LAST CMP|
|LAST LIPID PANEL|
|LAST LAB SYPHILIS|
|LAST URINE TRICH|
|LAST GC/CHLA URINE|
|LAST GC/CHLA RECTAL|
|LAST GC/CHLA PHARYNGEAL|
|LAST URINE HCG|
```

Step 5:

Add the note template(s) to an appropriate area under Shared Templates.



Step 5 (alternative option):

If the note template will be linked to a unique note title, a note title must be created in the Document Definitions Manager. Usual RPMS path: RPMS-EHR Configuration Master Menu -> TIU Configuration -> TIU Menu for Medical Records -> TIU Maintenance Menu -> Document Definitions (Manager) -> Create Document Definitions.

PHX Training Database - SecureCRT

File Edit View Options Transfer Script Tools Window Help

Enter host <Alt+R>

PHX Training Database x

Create Document Definitions Mar 06, 2025 11:19:09 Page: 1 of 1

BASICS

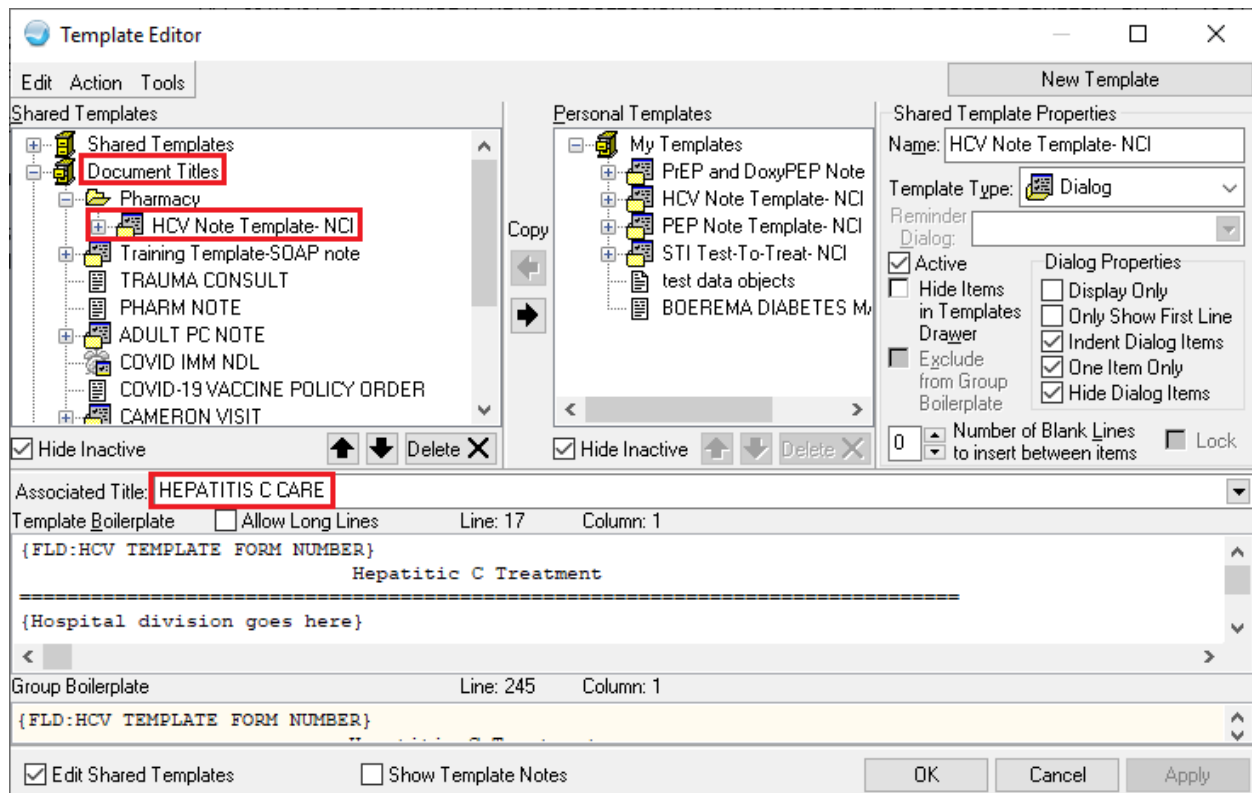
	Name	Type
1	CLINICAL DOCUMENTS	CL
2	PROGRESS NOTES	CL
3	PHARMACY NOTES	DC
4	ANTICOAG JL NOTES	TL
5	CONTROLLED DRUG	TL
6	HEPATITIS C CARE	TL
7	NONFORMULARY DRUG	TL
8	OUTSIDE RX	TL
9	PHARM NOTE	TL
10	PHARM REFILL	TL
11	TRANSITIONAL PHARMACY BENEFIT NOTE	TL

?Help >ScrollRight PS/PL PrintScrn/List +/- >>>

(Class/DocumentClass)	Next Level	Detailed Display/Edit
Title	Restart	Status...
(Component)	Boilerplate Text	Delete

Select Action: Title// ■

In Template Editor, add the note template to an appropriate area under Document Titles (instead of Shared Templates). Add your unique note title to the Associated Title section of the note template.



The note templates are now ready to use.