

THE INDIAN HEALTH SERVICE

RPMS EHR CAC Review



TIU Templates Components

Superior Health Information Management
Now and for the Future

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Template Fields

- Who can create or modify Template Fields?
 - This is controlled by the parameter: TIU FIELD EDITOR CLASSES.
 - TIU is pre-configured to allow the user class of Clinical Coordinator to create new template fields.
 - Locally you may decide to add additional users without giving them Clinical Coordinator and access to Shared Templates.

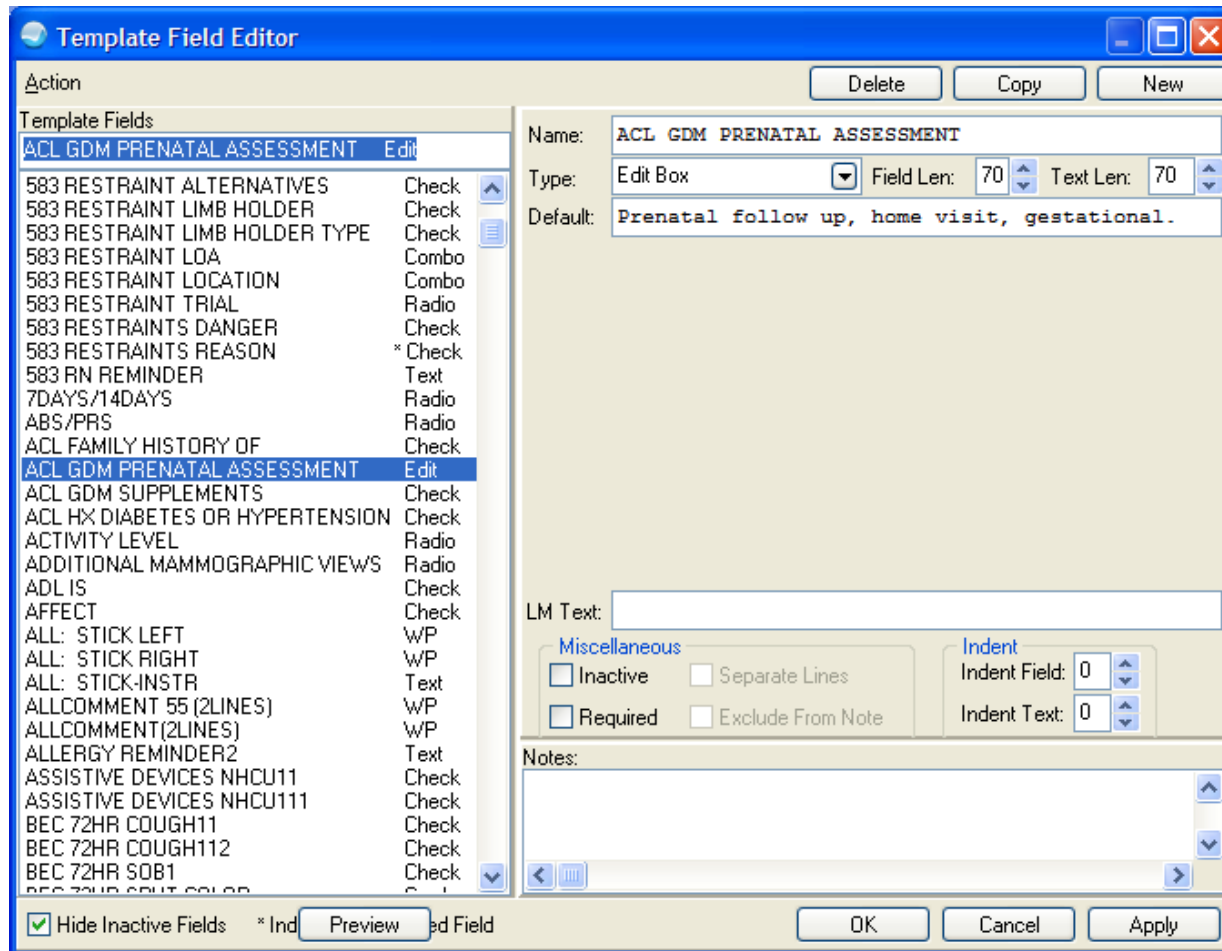
Template Field Availability

- Regardless of who is allowed to create TIU Template fields, once created, the template fields are available to all users who are allowed to create templates.

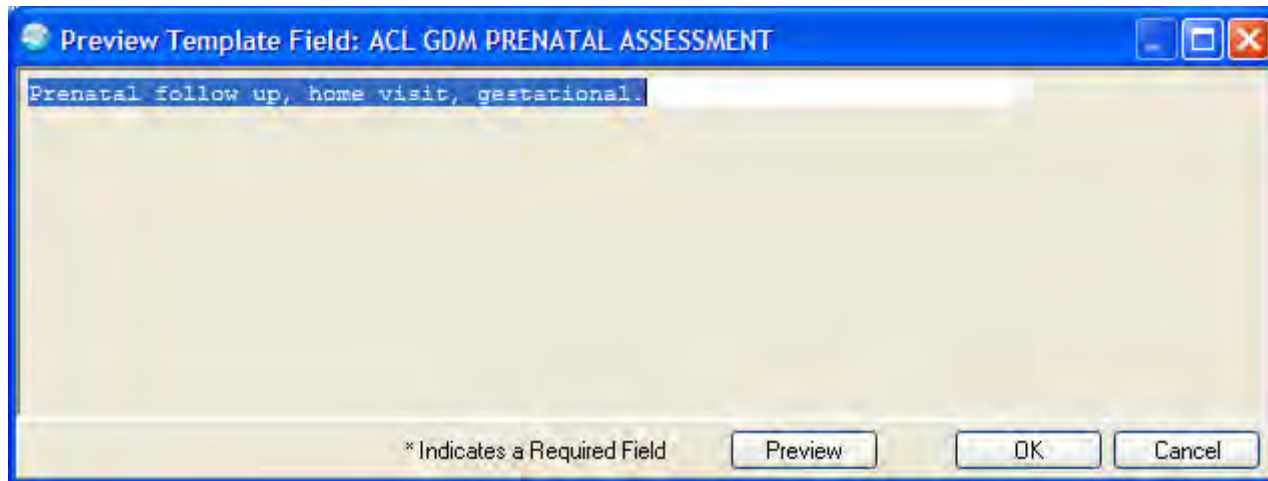
Template Field Types

- Edit Box Fields
- Combo Box Fields (Drop Down box fields)
- Button Fields
- Check Box Fields
- Radio Button Fields
- Date Fields
- Number Fields
- Word Processing Fields
- Hyperlink Fields
- Text Fields

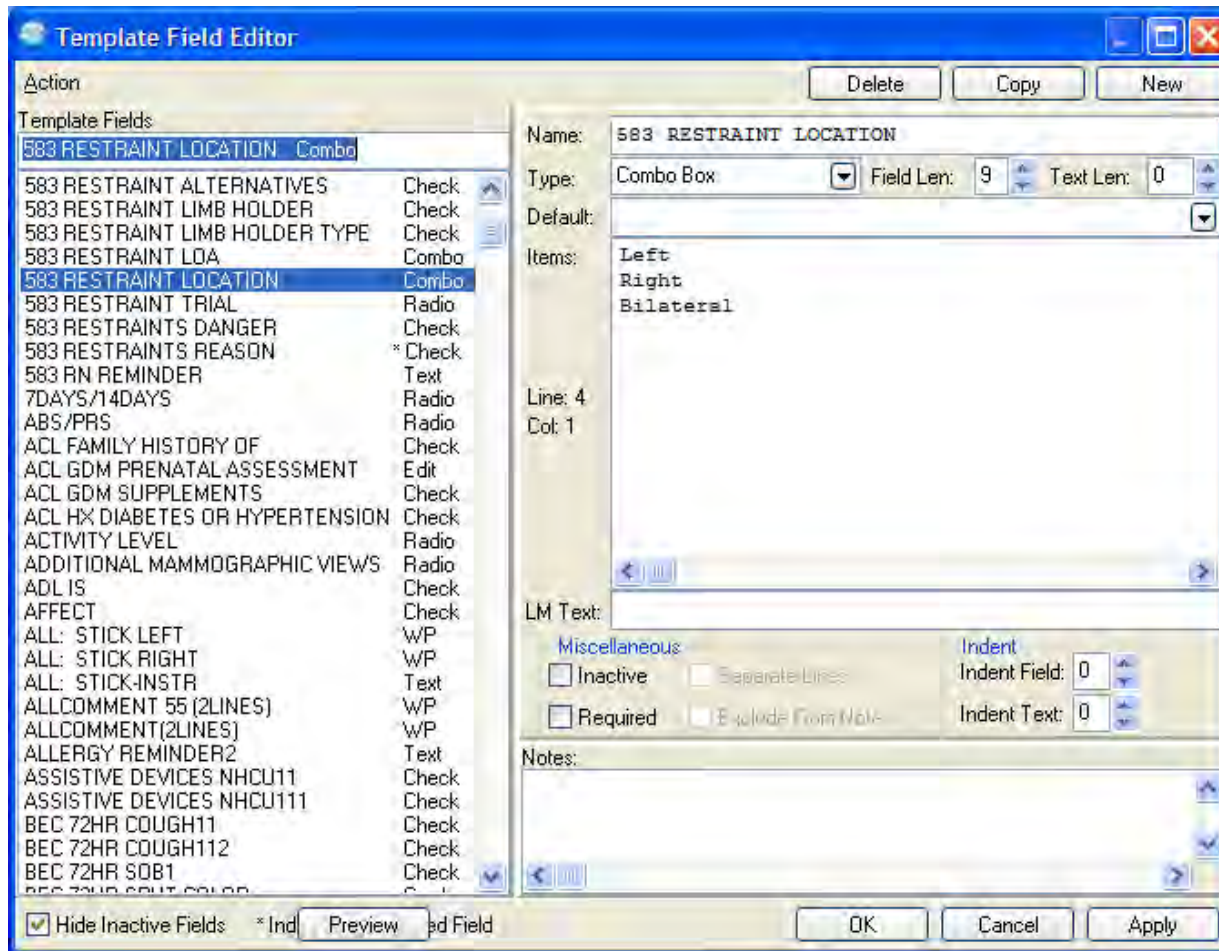
Edit Box



Edit Box Preview



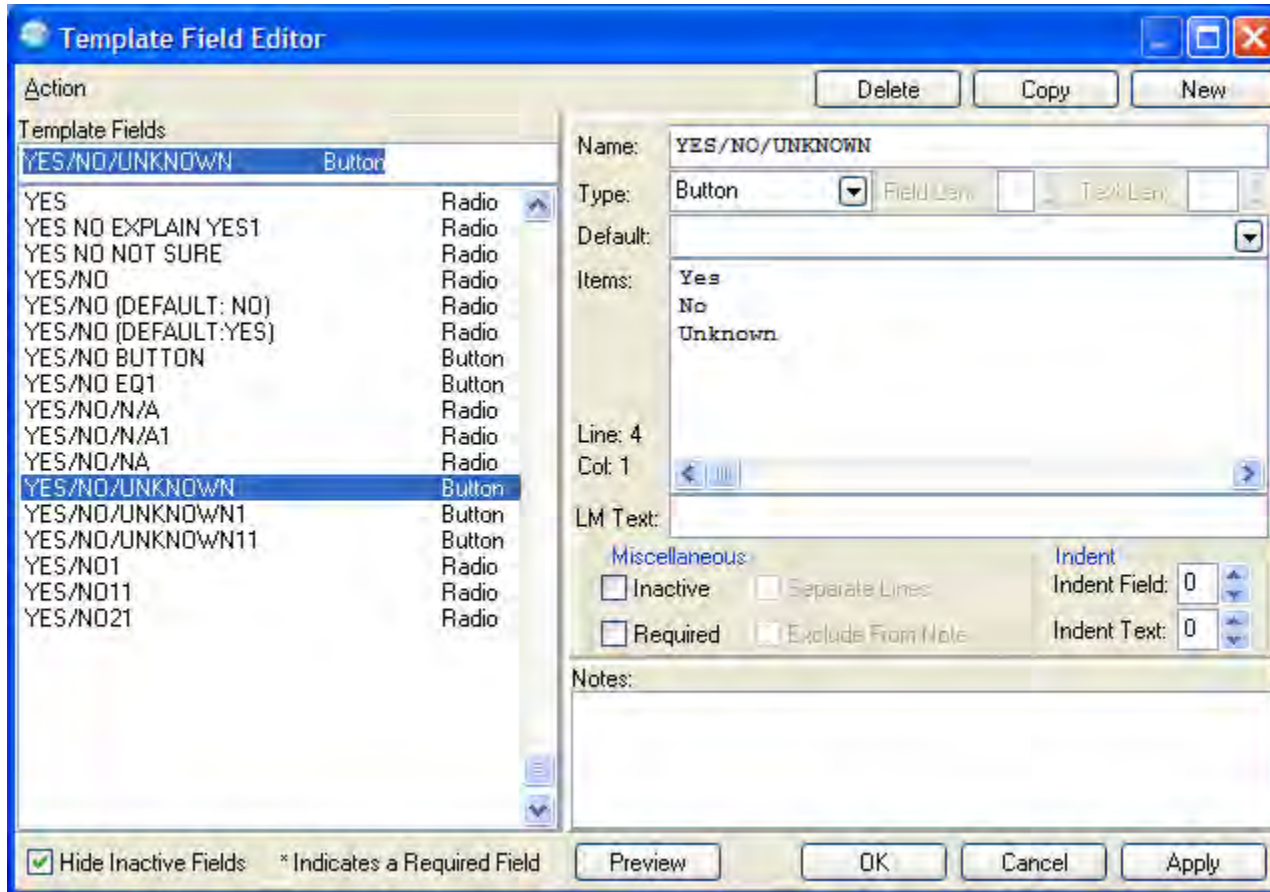
Combo Box



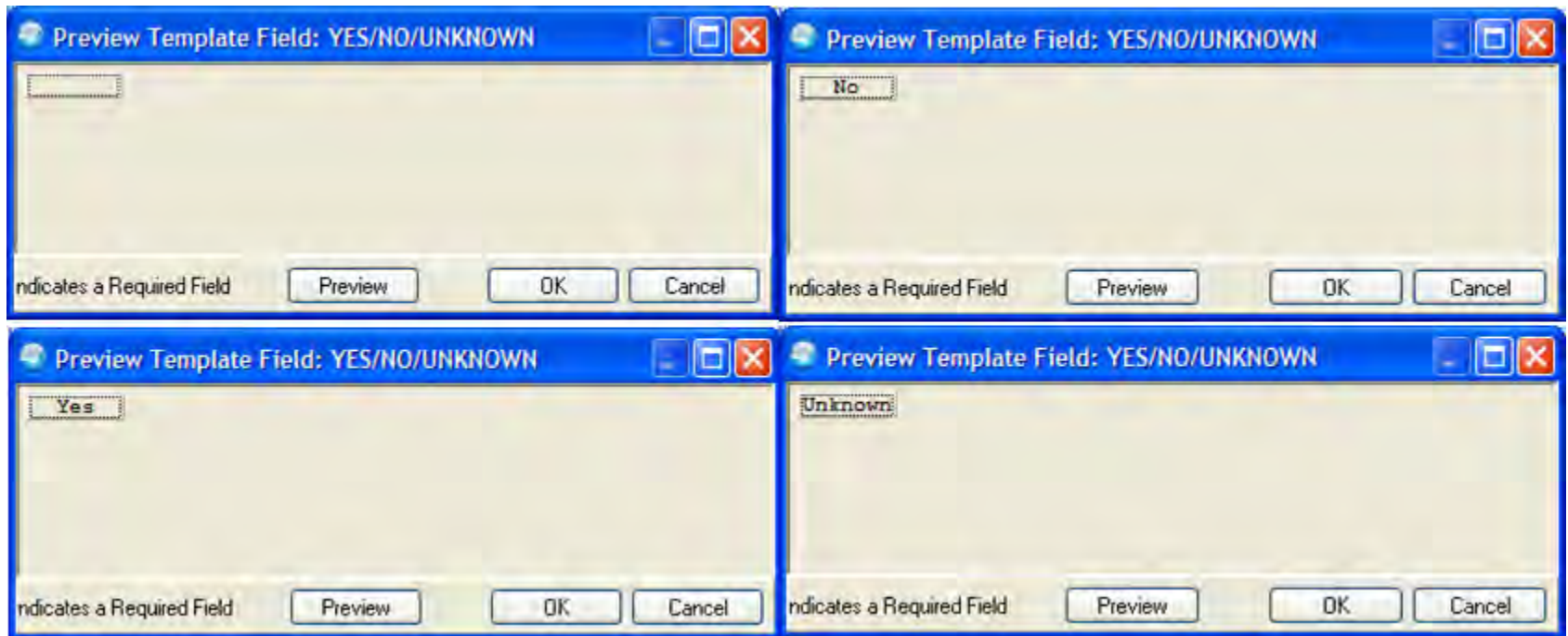
Combo Box (Drop Down) Preview



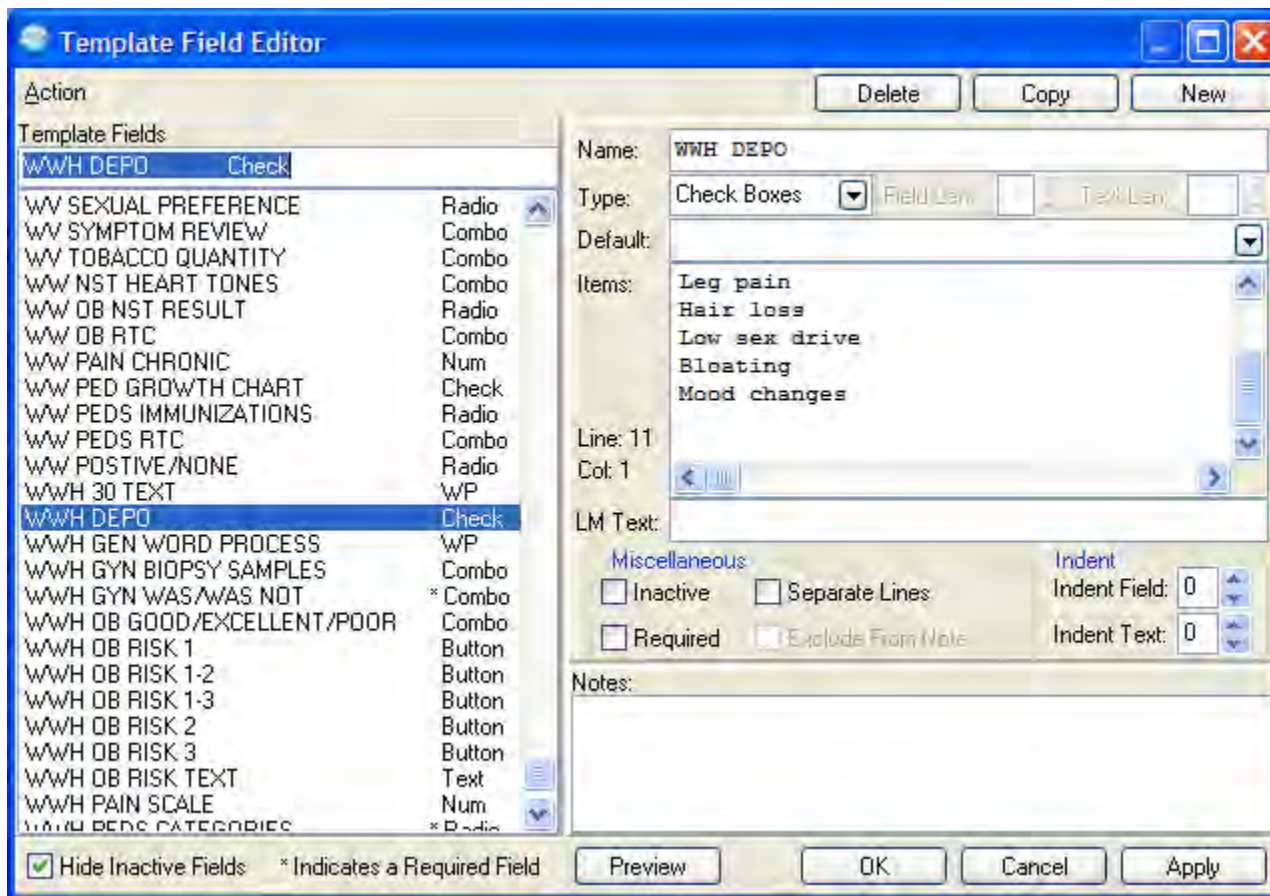
Button



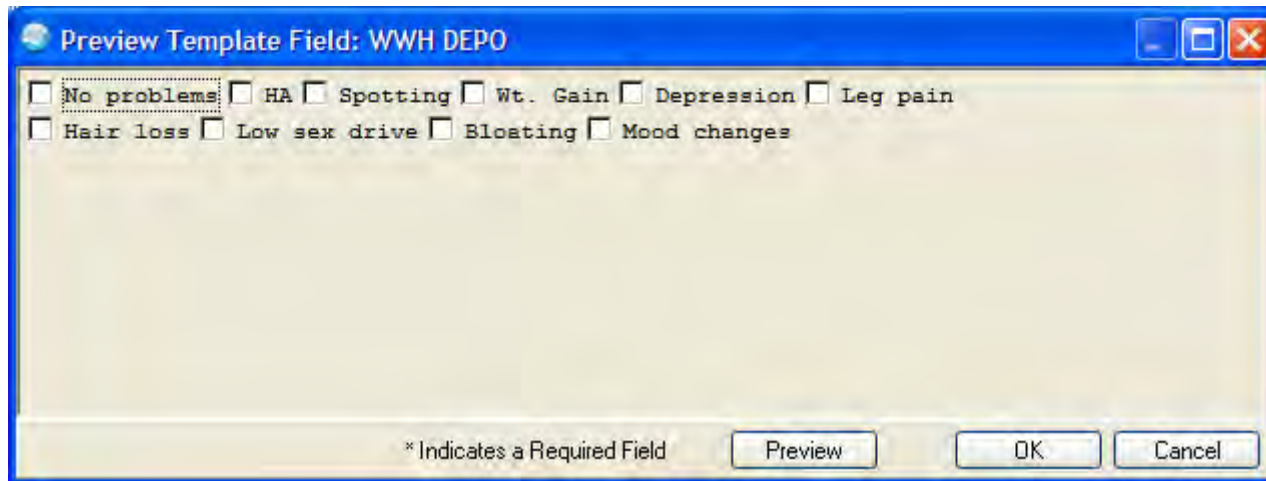
Button Preview



Check Box



Check Box Preview



Preview Template Field: WWH DEPO

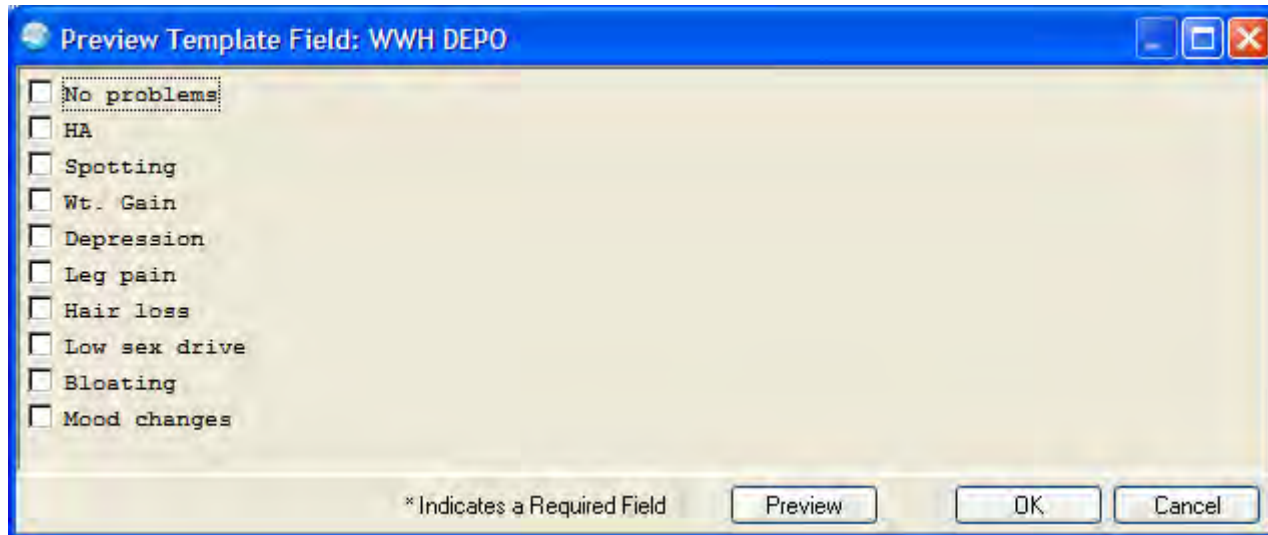
No problems: HA Spotting Wt. Gain Depression Leg pain

Hair loss Low sex drive Bloating Mood changes

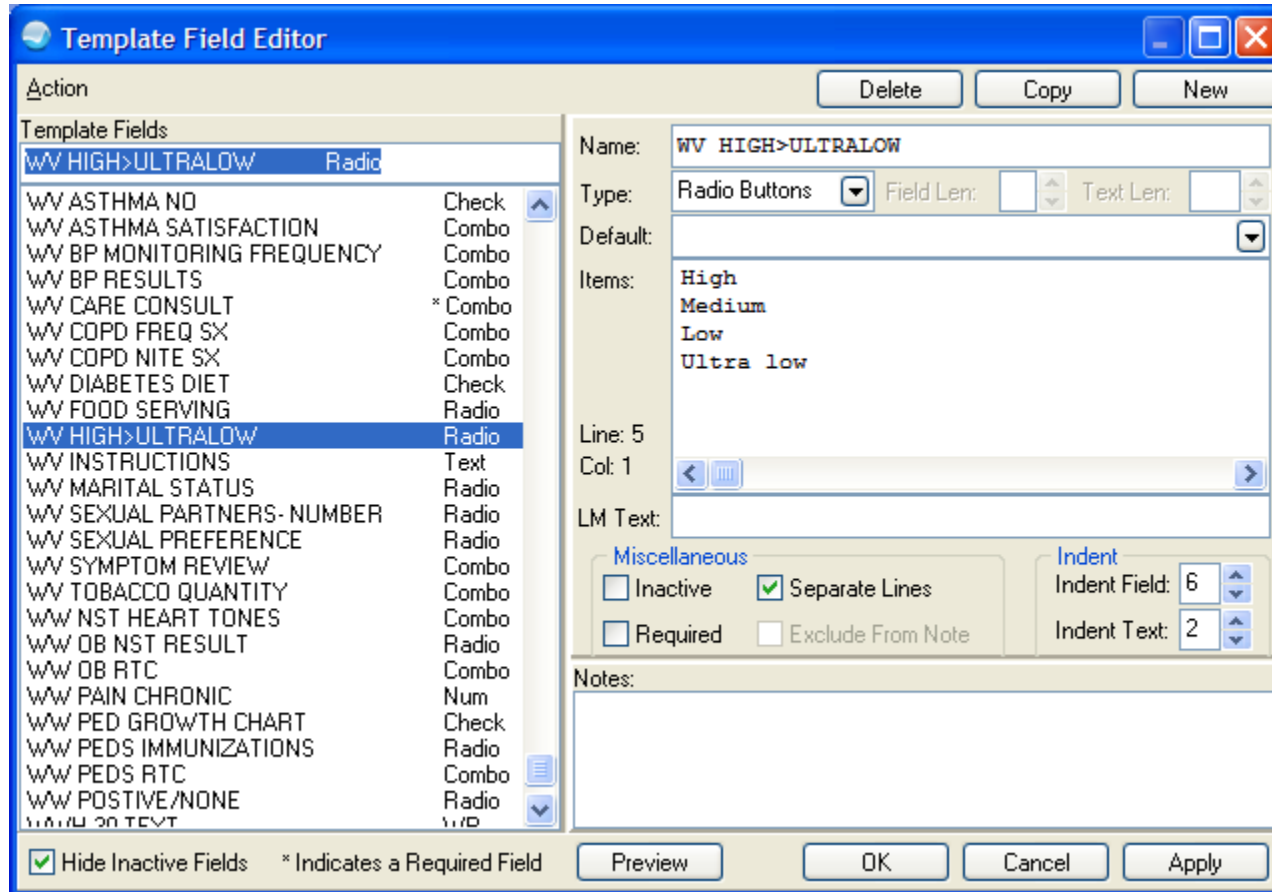
* Indicates a Required Field

Preview OK Cancel

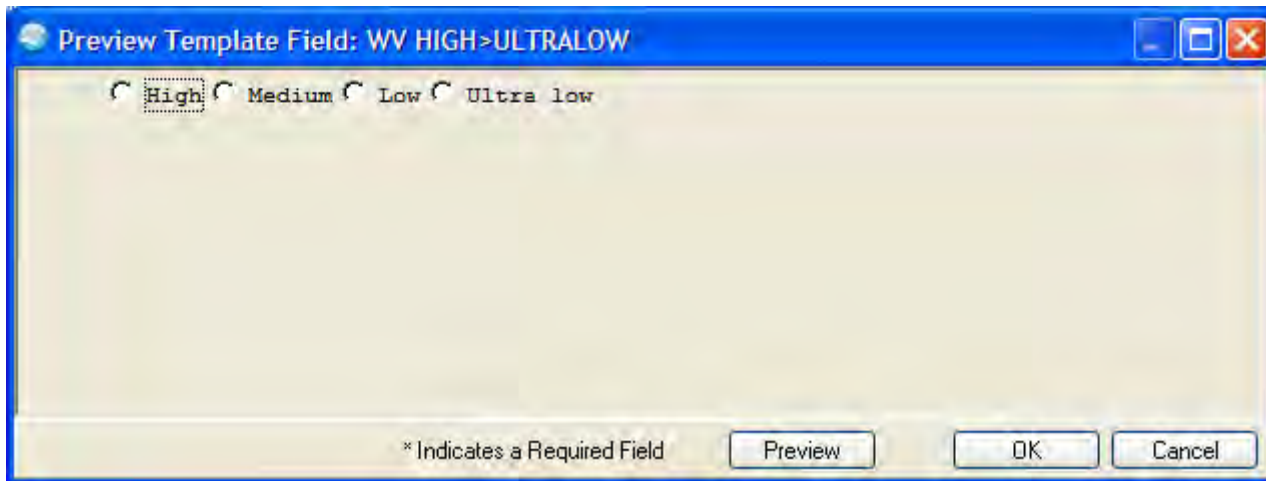
Check Box Preview (Separate Lines)



Radio Button



Radio Button Preview

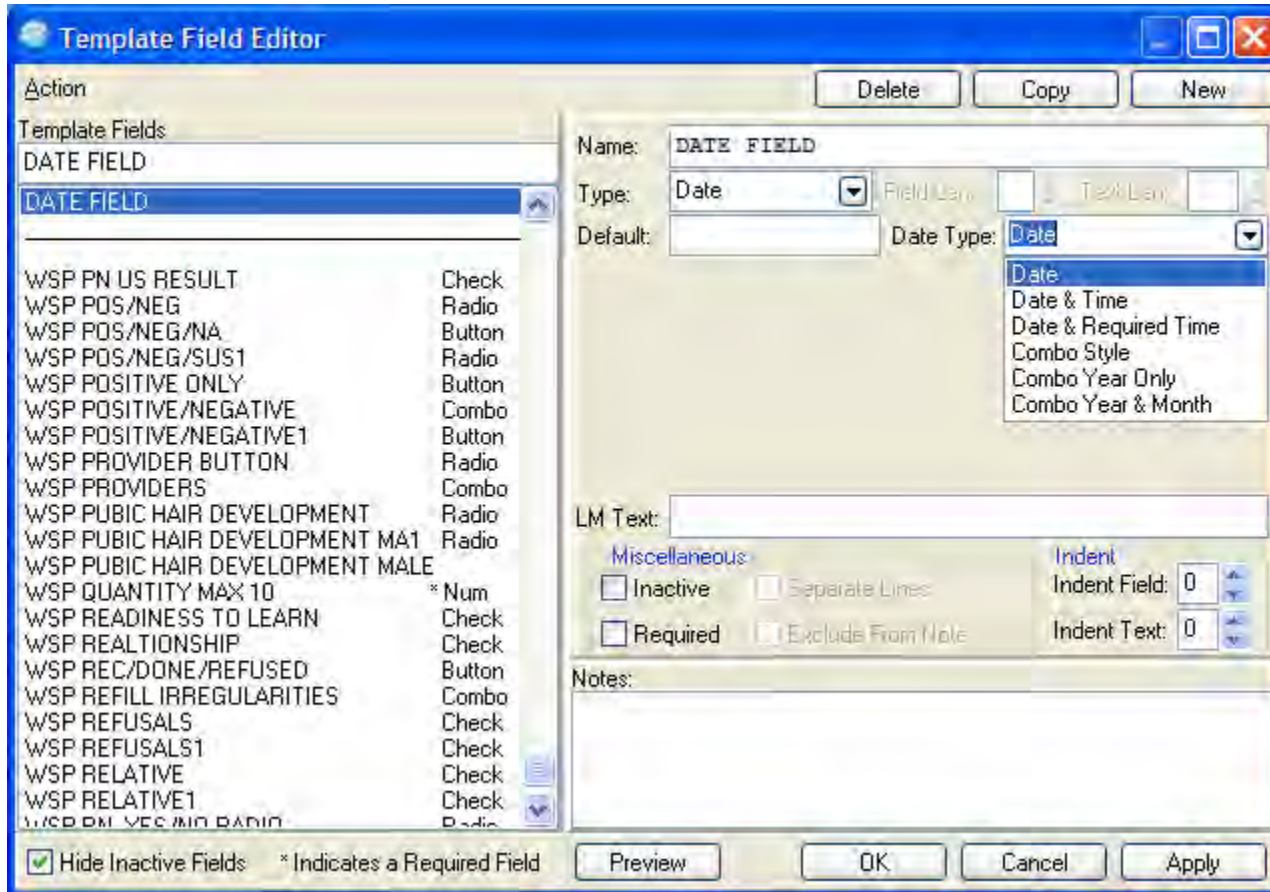


Date Fields

There are multiple formats available for the Date Field:

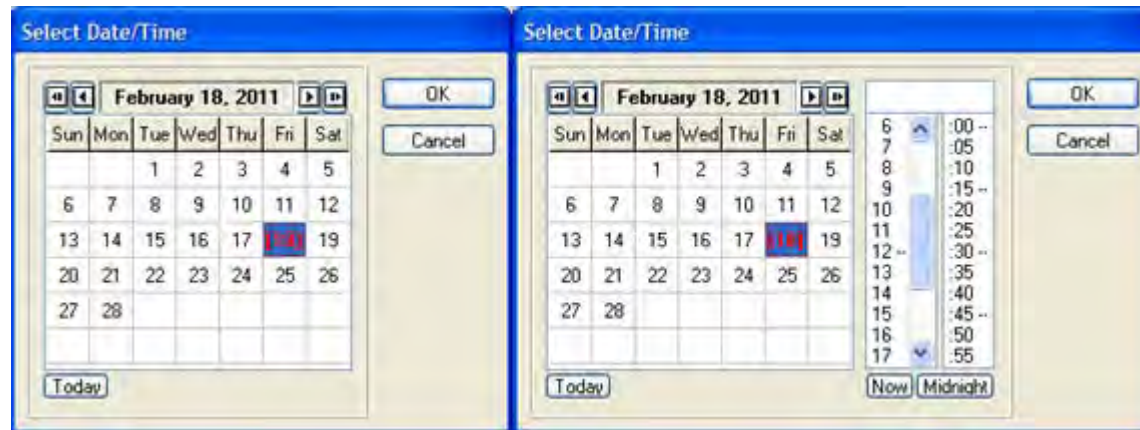
- Date
- Date and Time
- Date and Required Time
- Combo Style
- Combo Year Only
- Combo Year & Month

Date

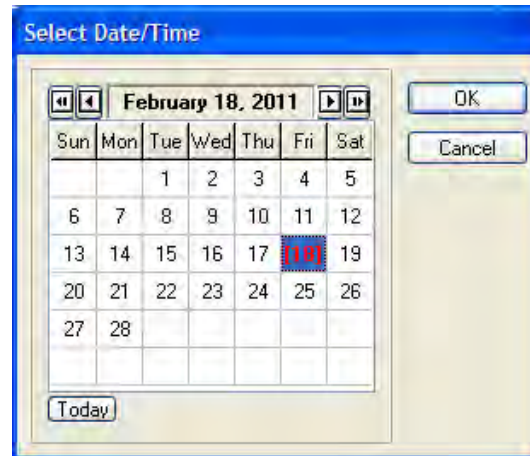
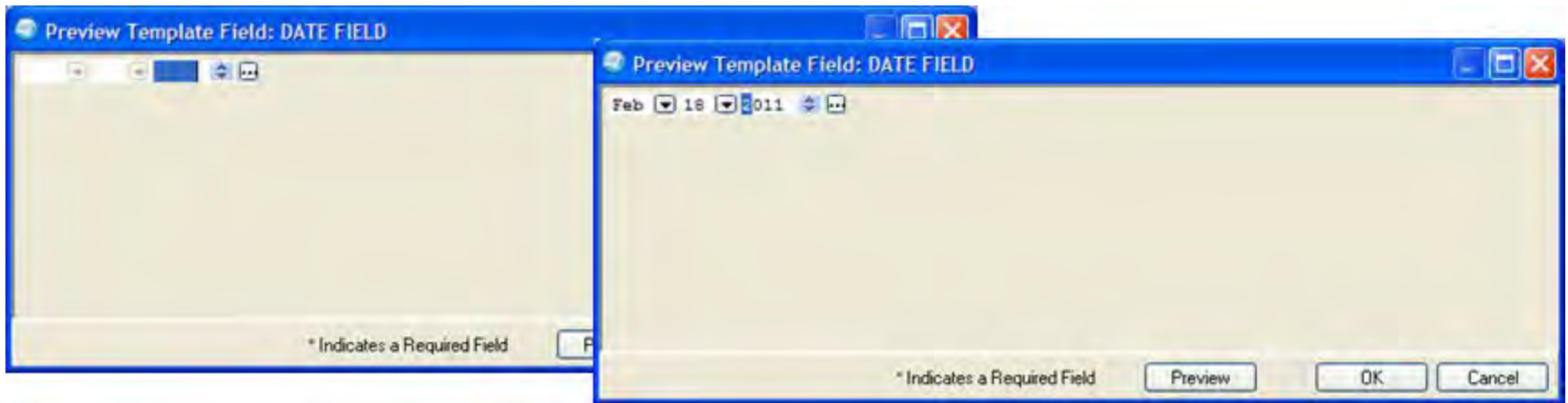


Date Preview

Simple Date or Date and Time



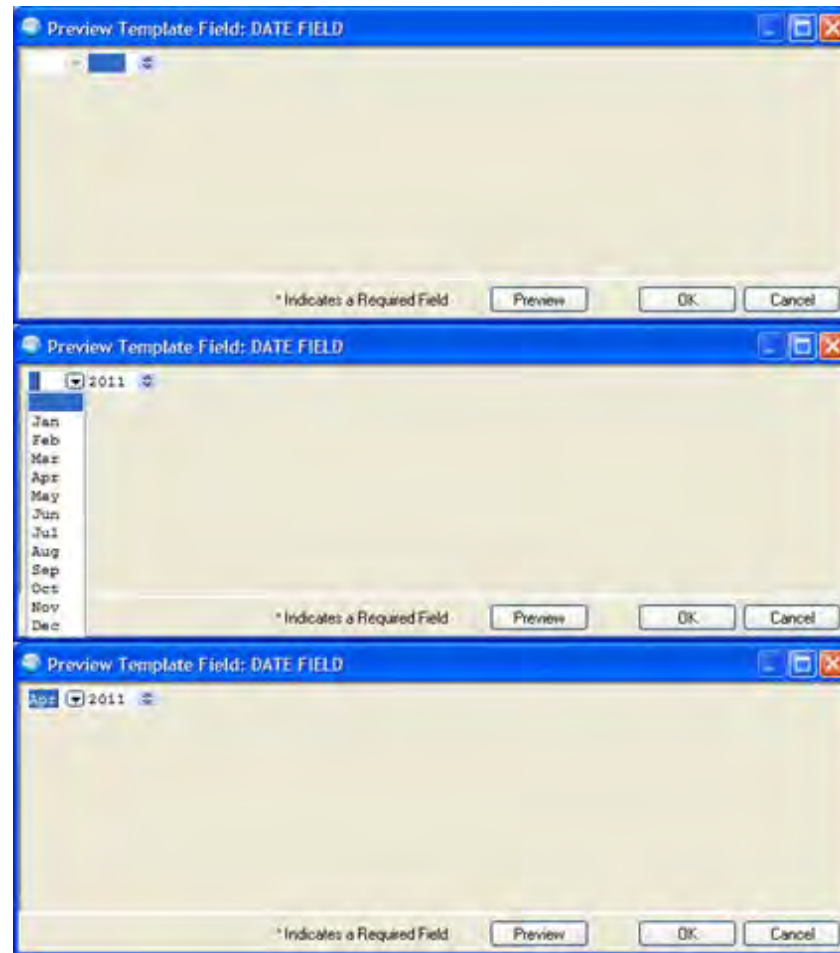
Date Combo Style Preview



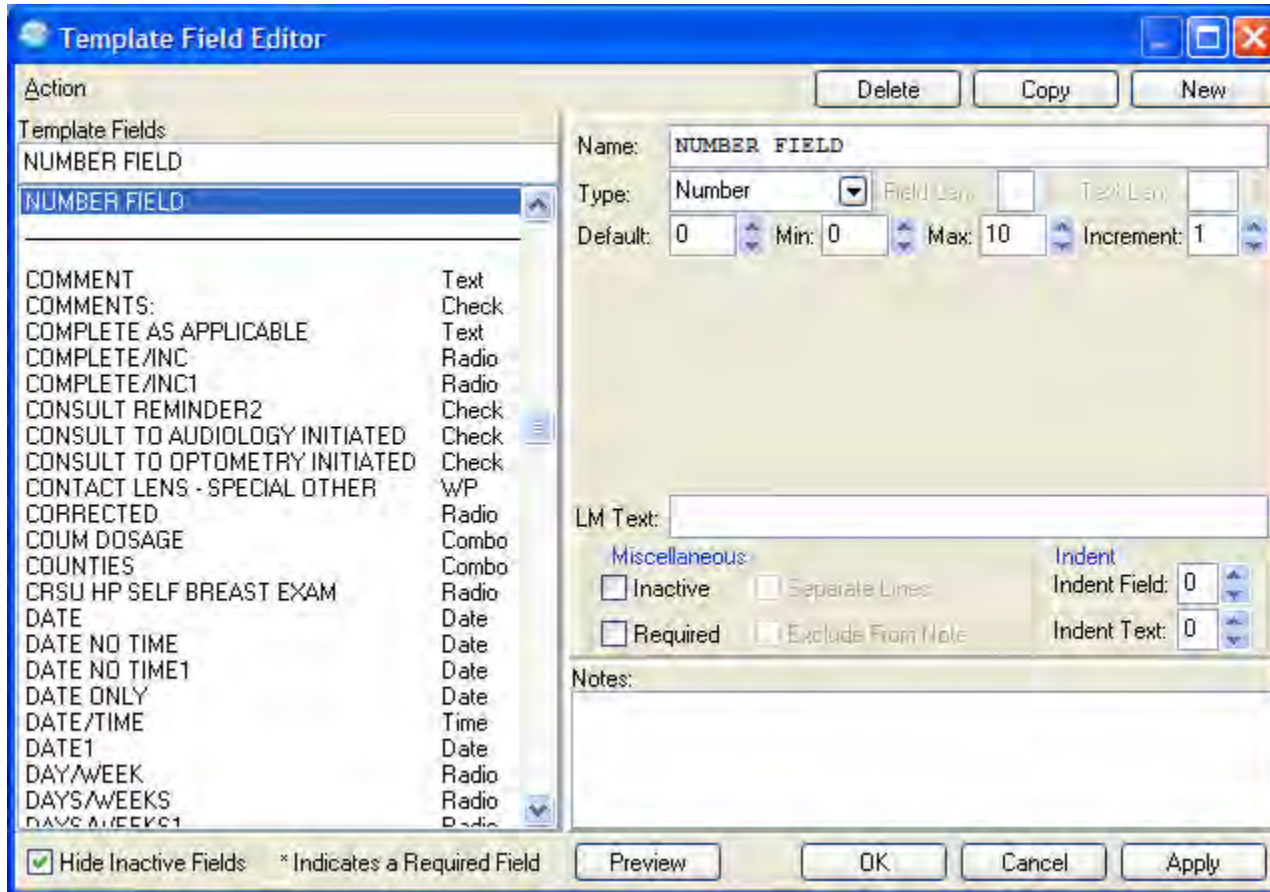
Date Preview Combo Year Only



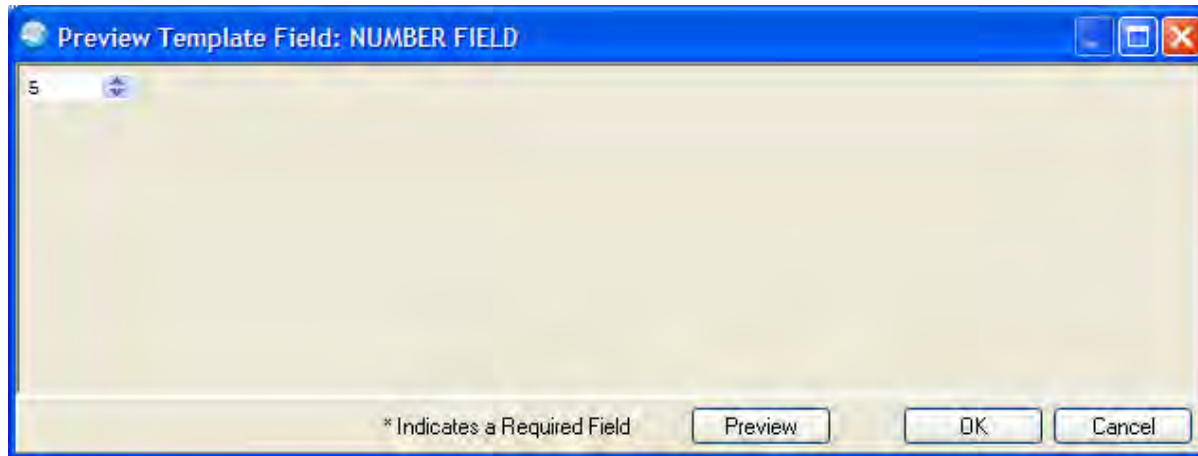
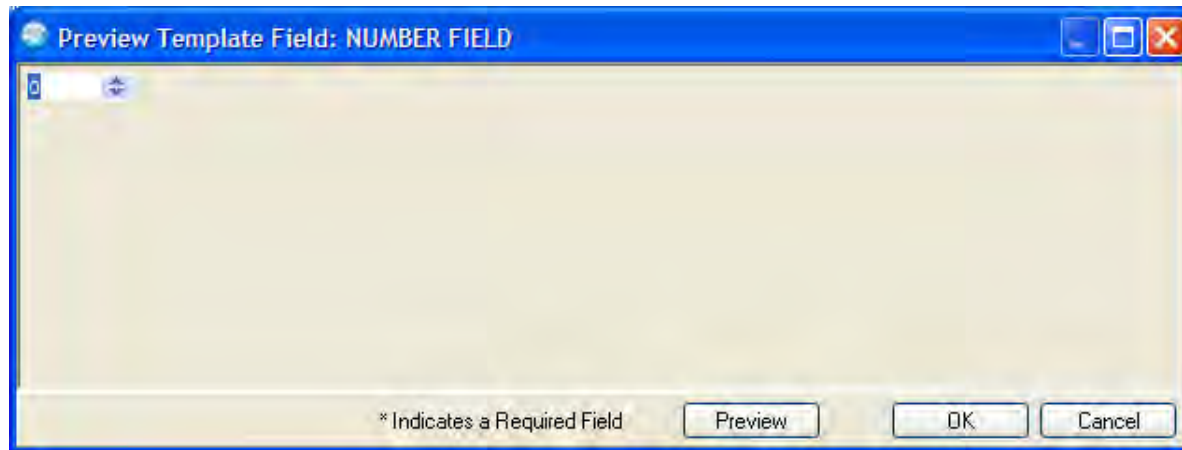
Date Preview Combo Year and Month



Number



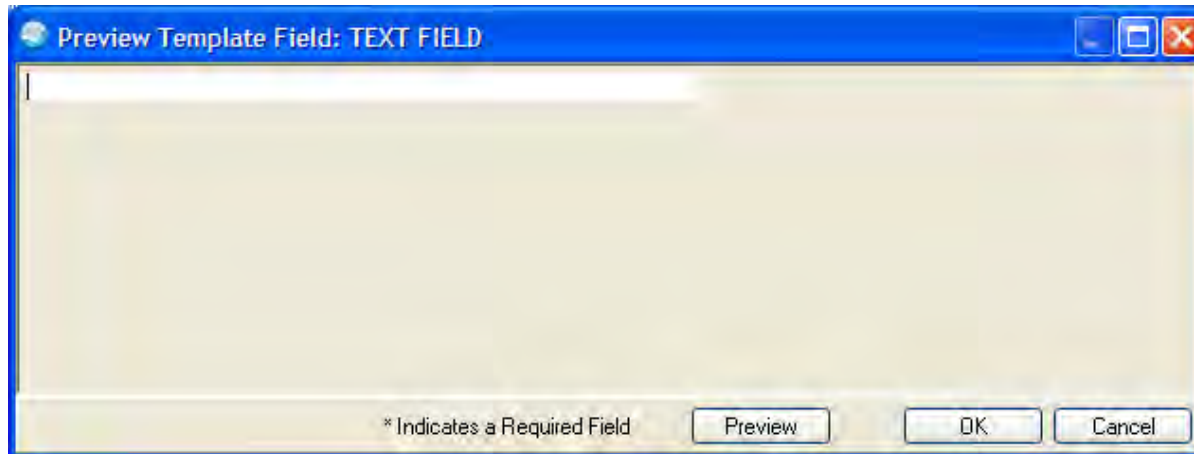
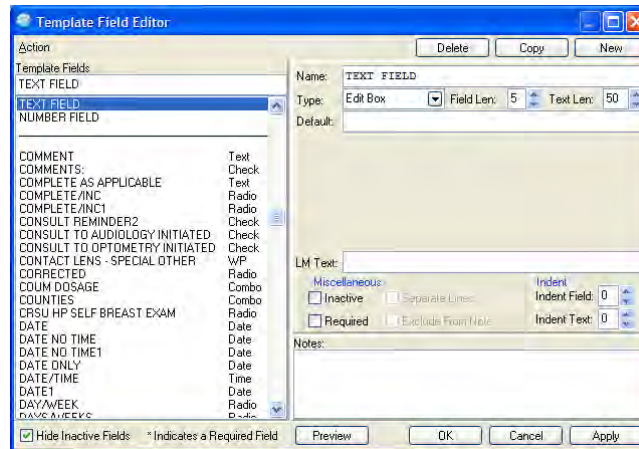
Number Preview



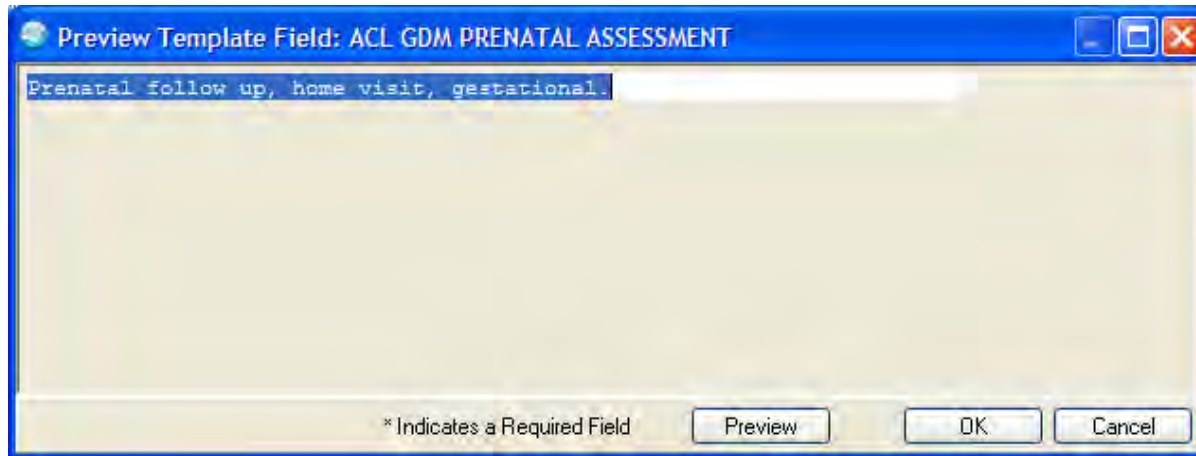
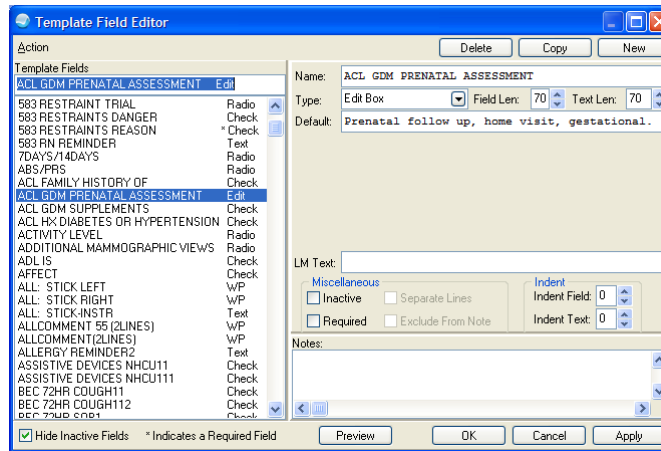
Word Processing and Edit Box Fields

- Edit Box fields give a user an input area of a fixed length (e.g., 50 characters).
- Word Processing fields allow unlimited input of text.
- The width, height and indent of the Word Processing box is customizable.
- Edit Box and Word Processing fields may be blank or may have default text inside.
- When default text is present it may be edited by the template user.

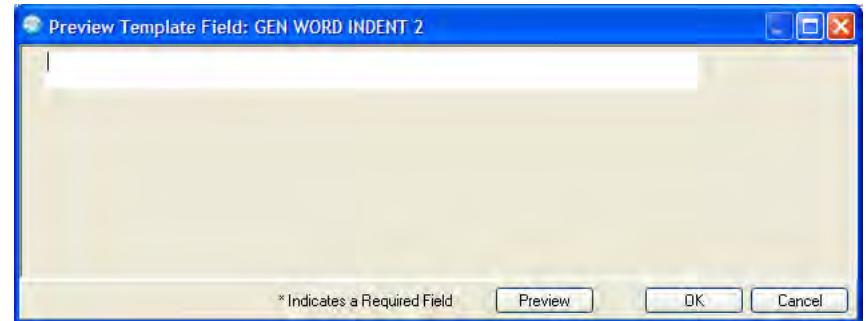
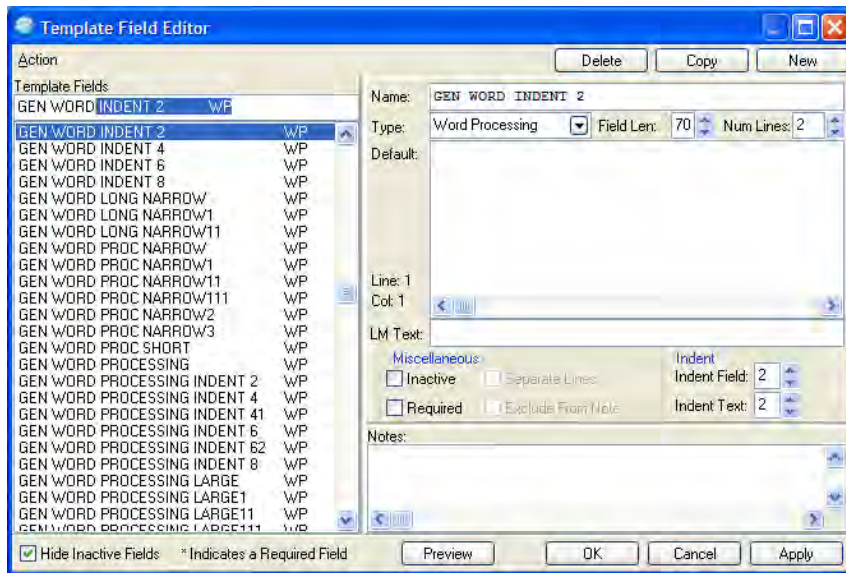
Edit Box Field Blank Field for Type In



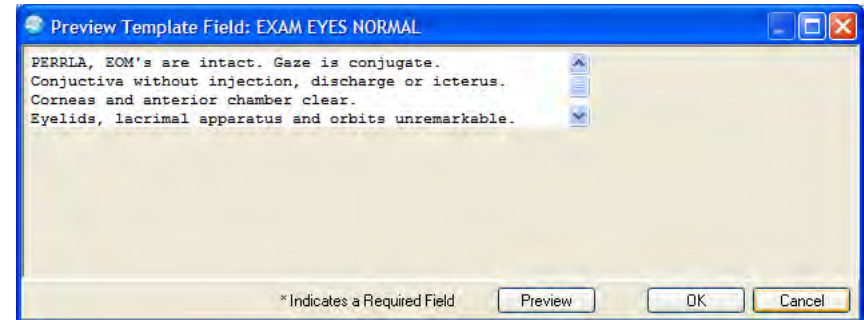
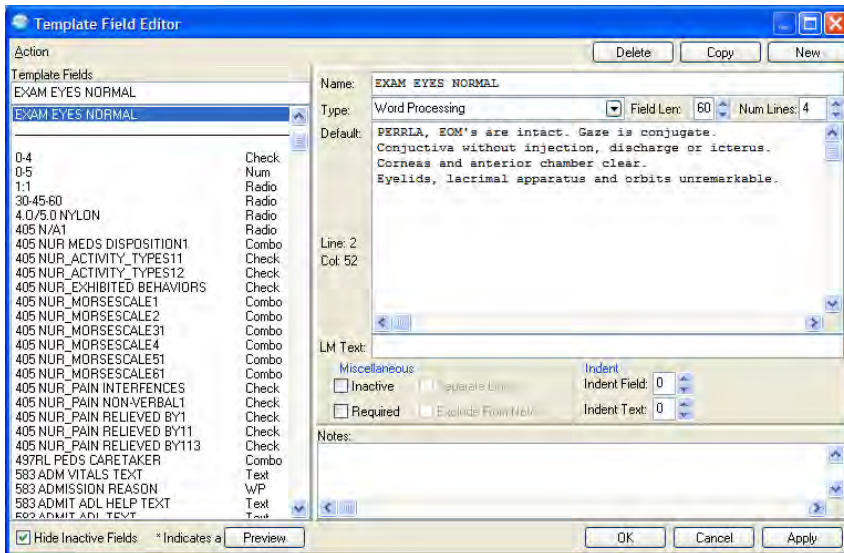
Edit Box Field With Default Text



Word Processing Blank Field for Type In



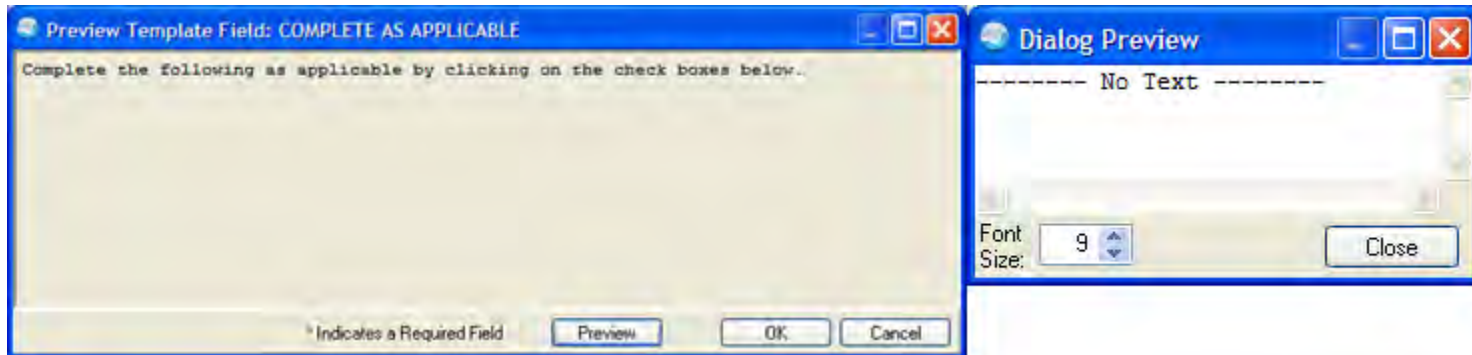
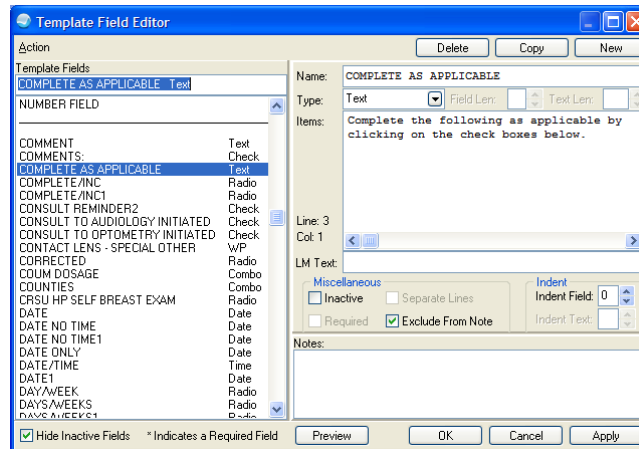
Word Processing With Default Text



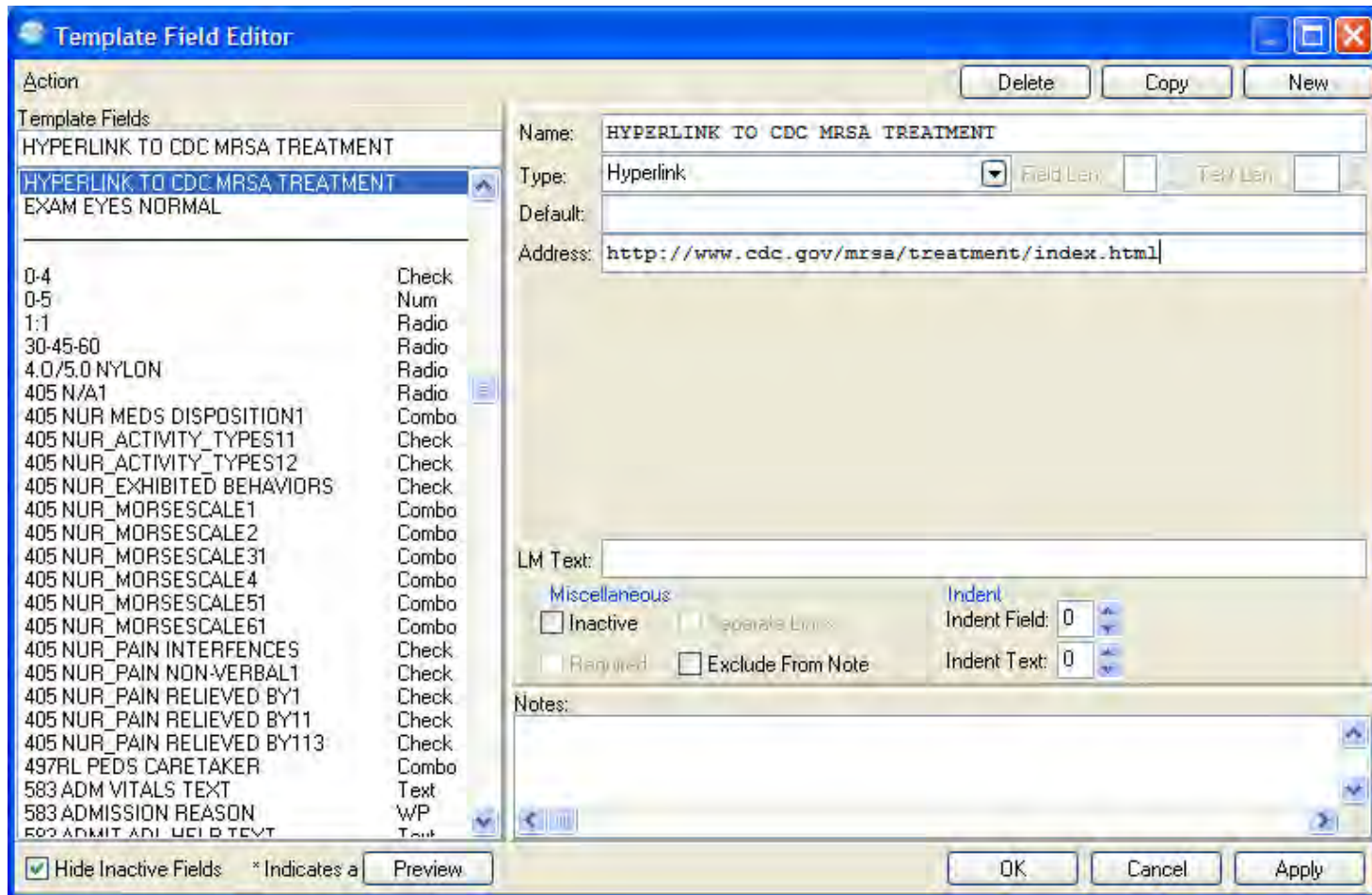
Text Field

- Text fields are used to place uneditable text in the template.
- While this text may be included in the final output, often it is used for directions within the template itself, but is excluded from the output.

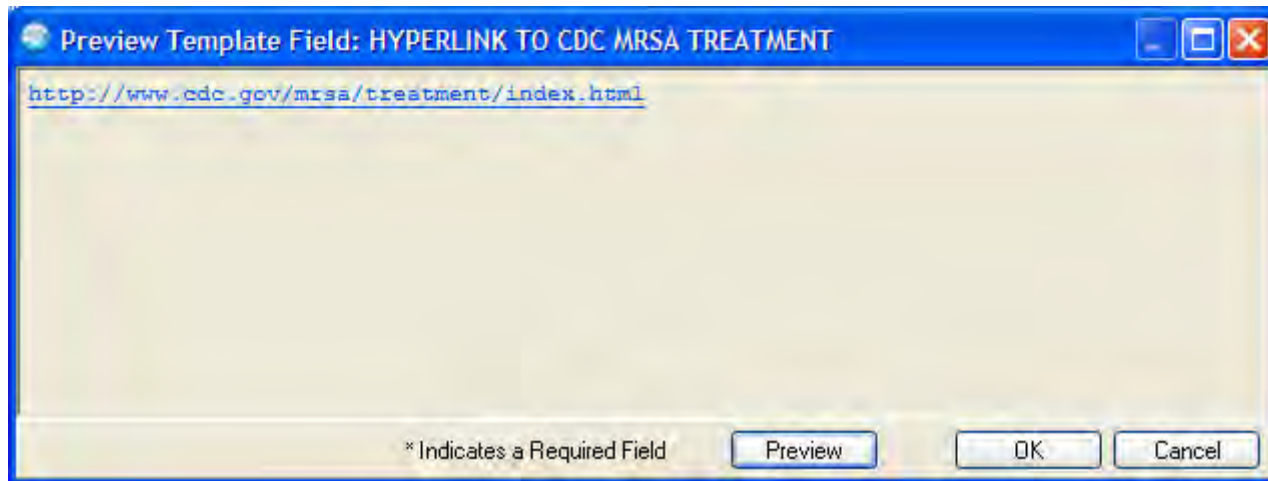
Text Field Excluded from Note



Hyperlink



Hyperlink Preview



Hyperlink

- The Hyperlink field does not output into the final document.
- The Hyperlink field provides an embedded link so the user of the template has access to additional information while using the template.

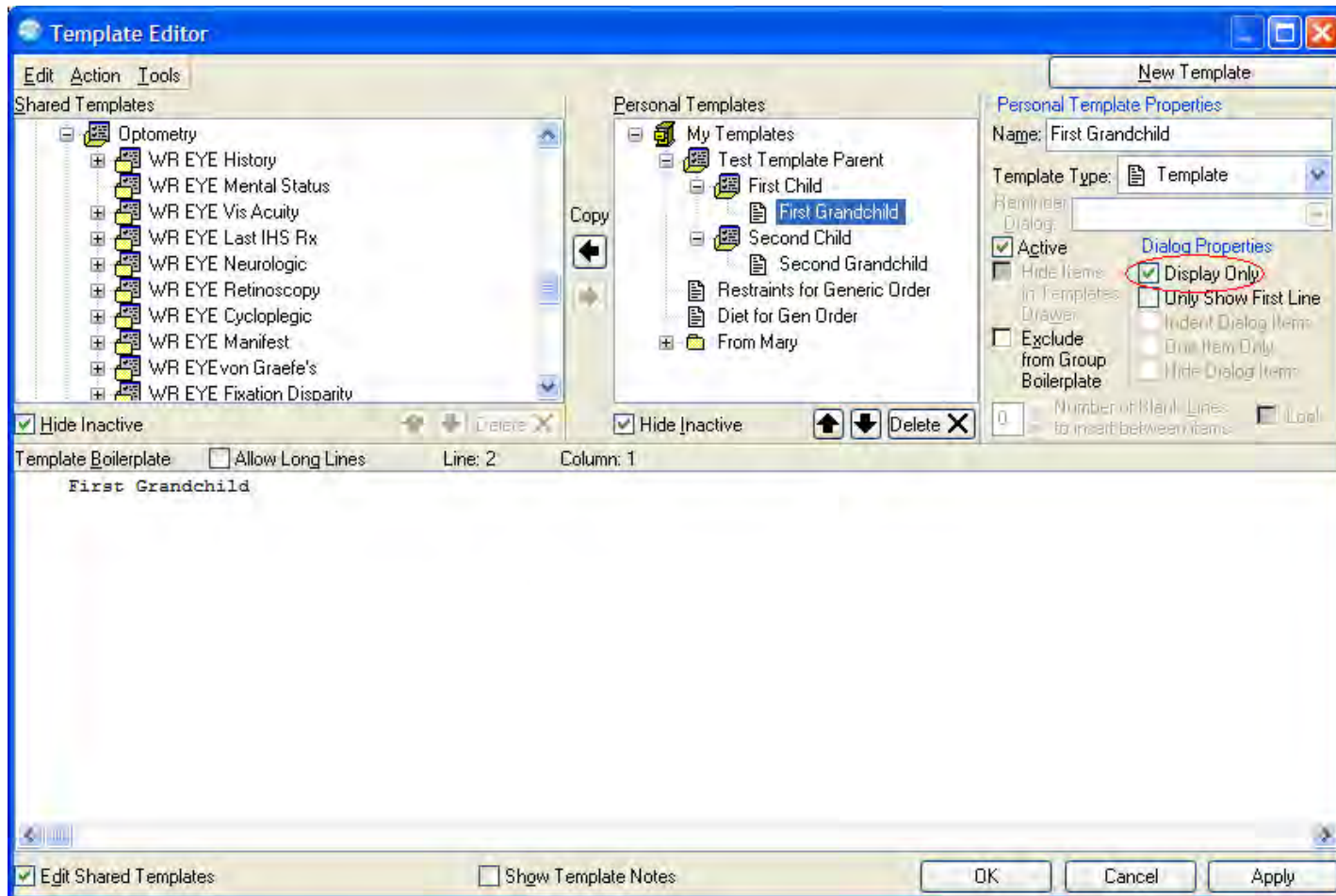
Common Properties of Templates

- Display Only
- Only Show First Line
- Indent Dialog Items
- One Item Only
- Hide Dialog Items
- Required

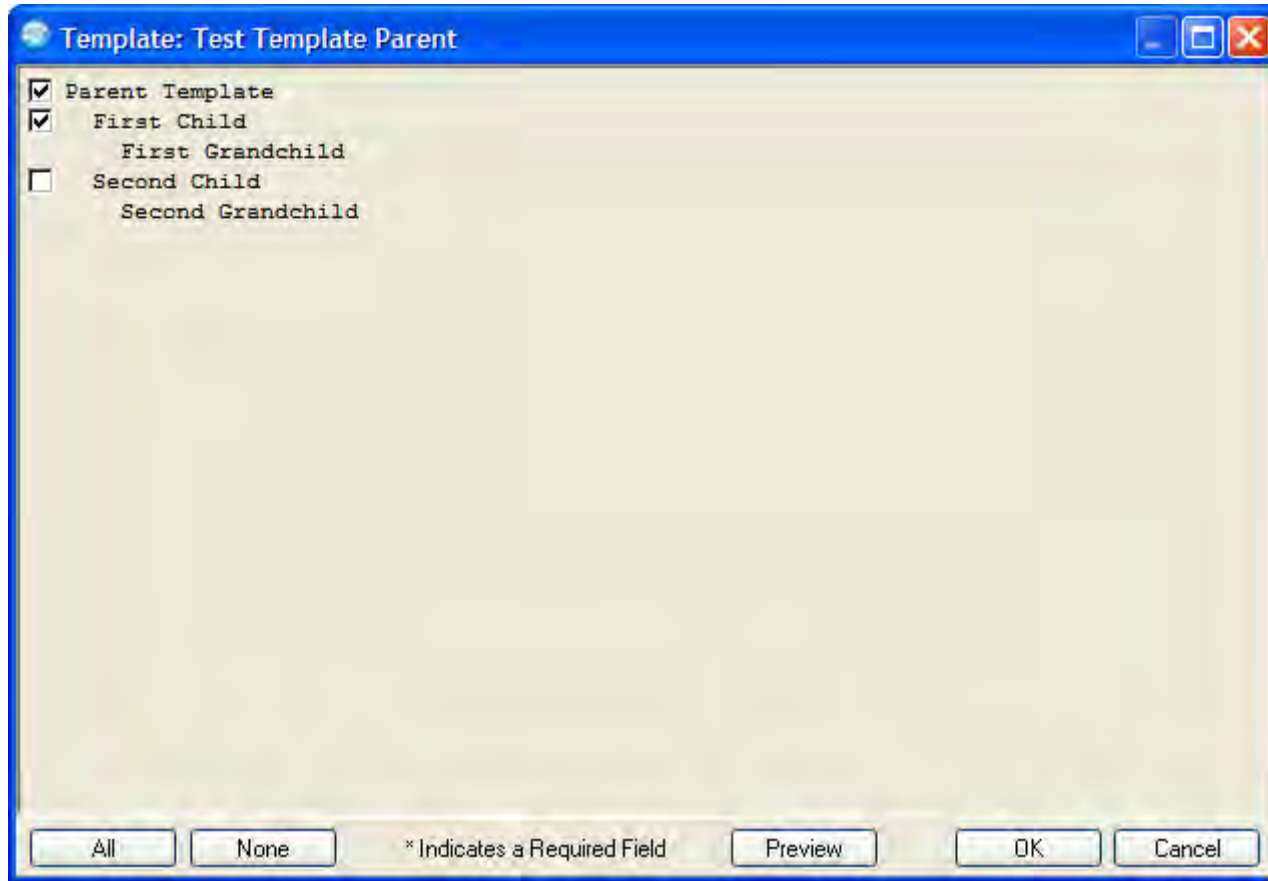
Display Only

- This was demonstrated previously for a Text Field.
- It can also be used for Templates and Dialogs.

Display Only

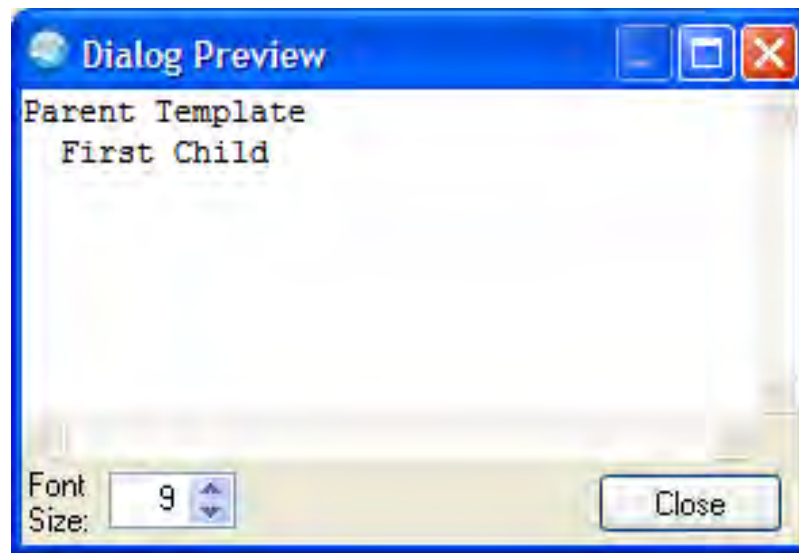


Display Only

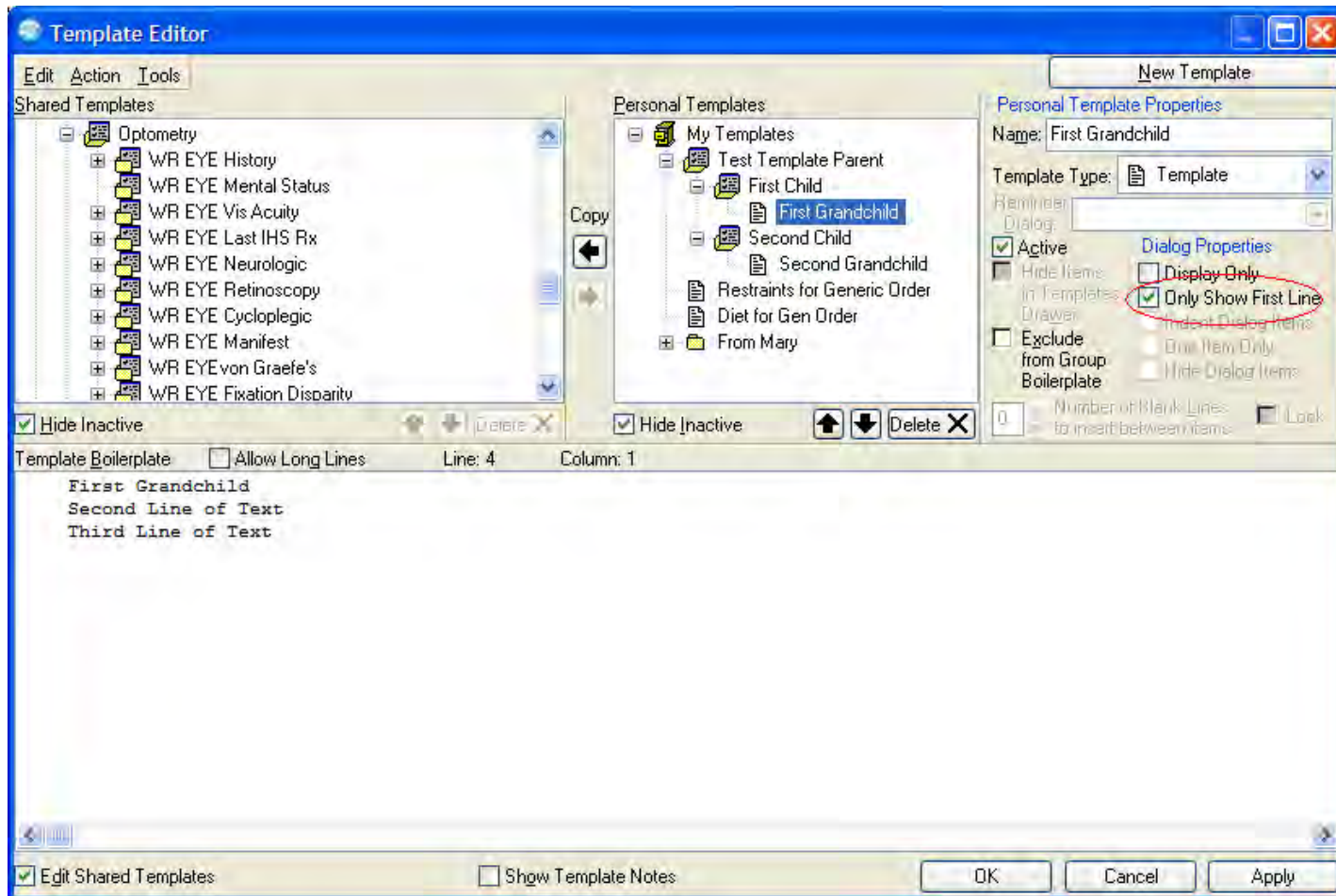


Display Only

- First grandchild is not part of output.



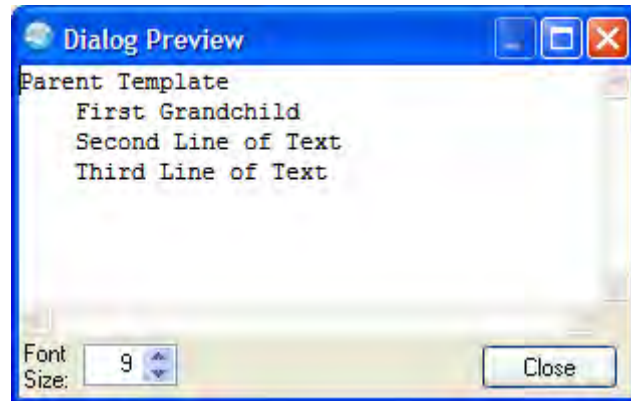
Only Show First Line



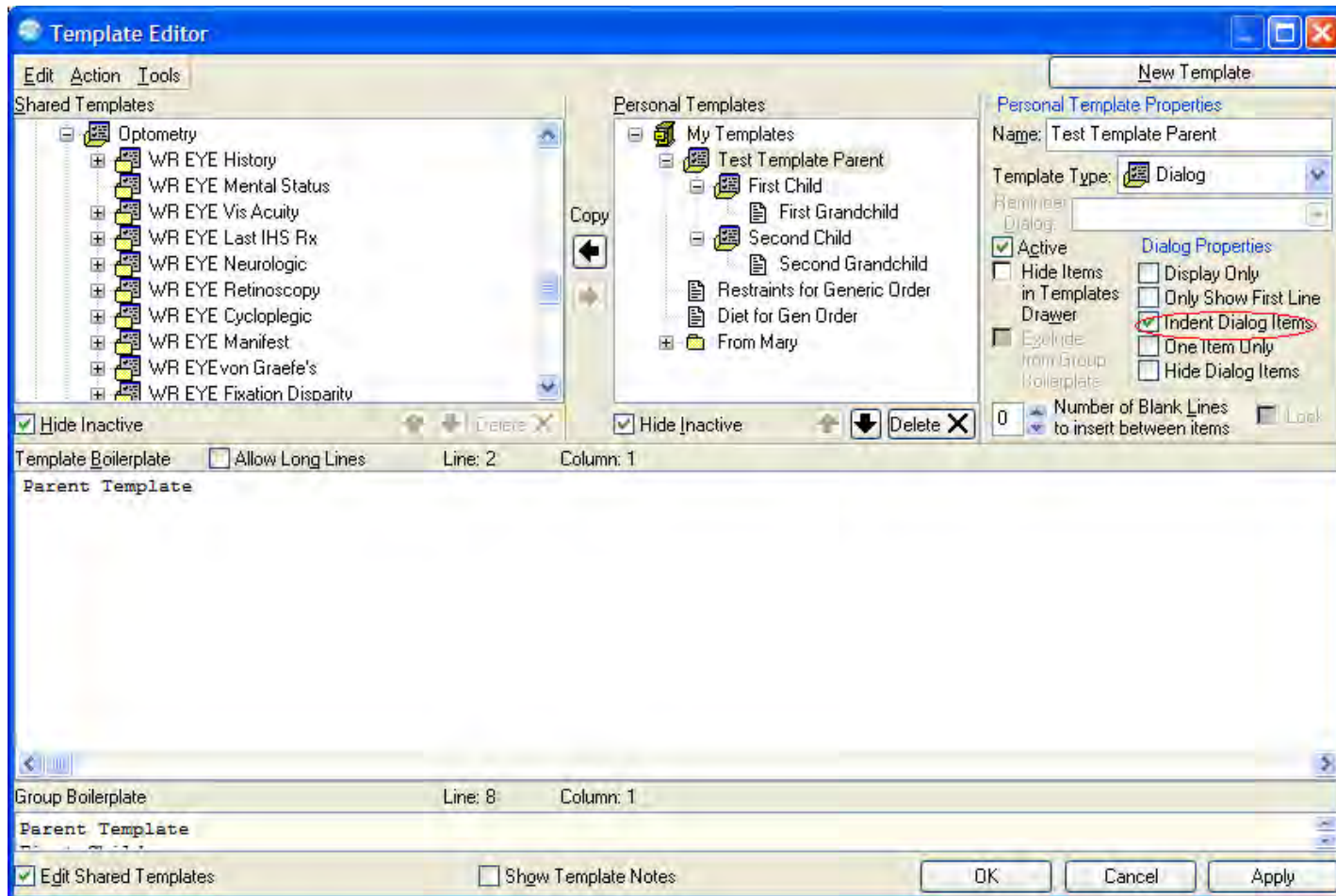
Only Show First Line



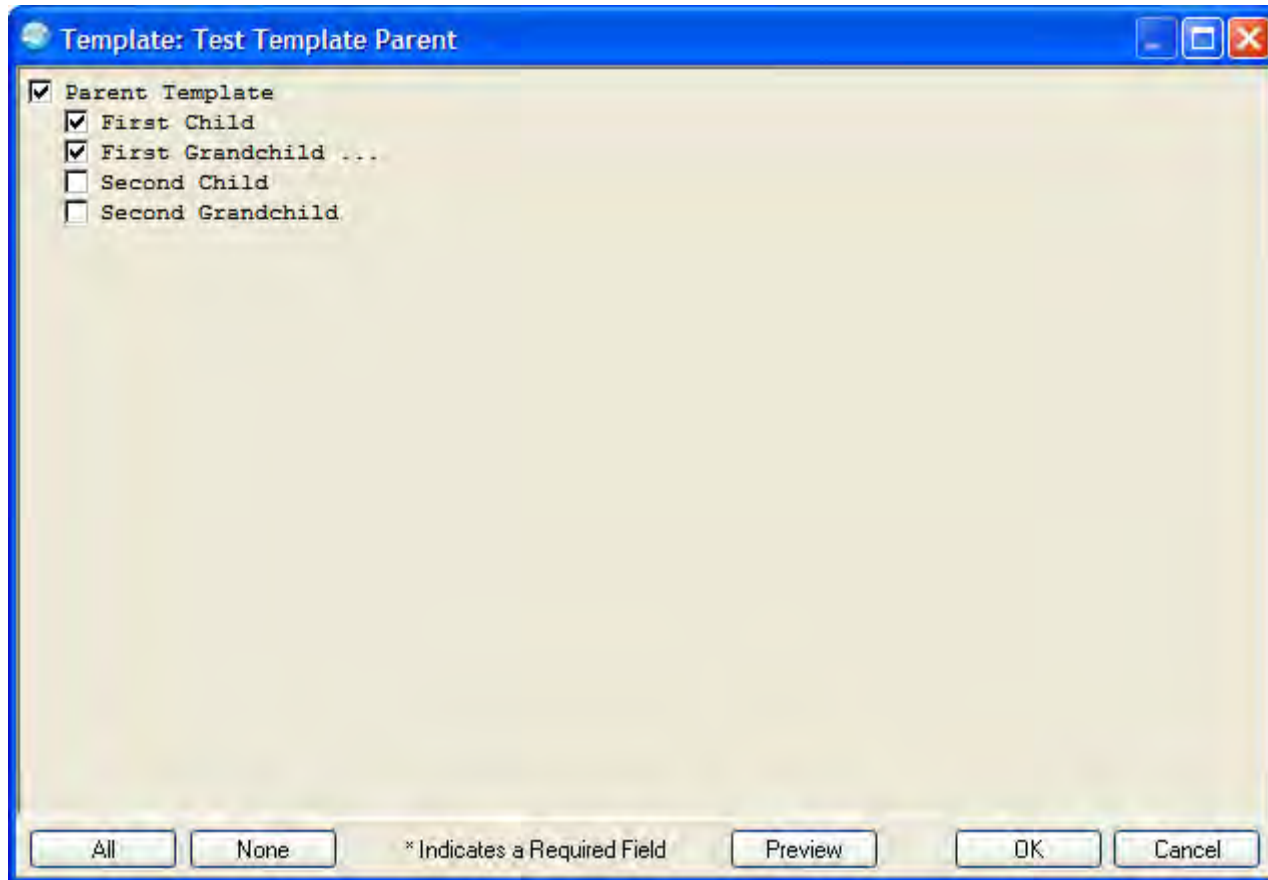
Only Show First Line



Indent Dialog Items

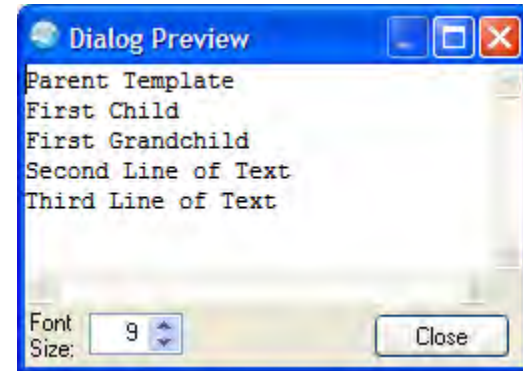


Indent Dialog Items



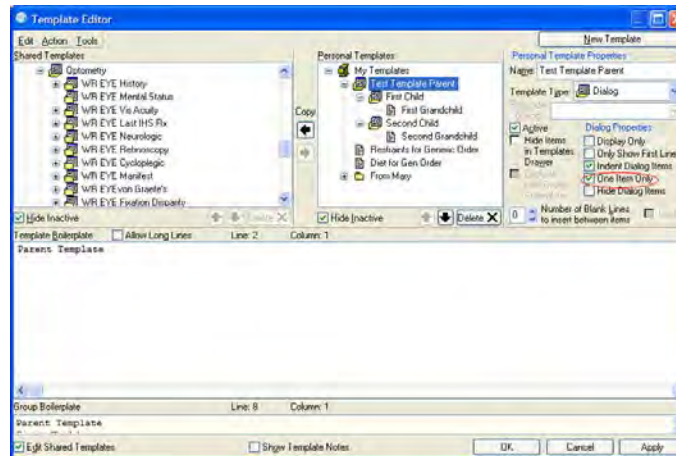
Indent Dialog Items

- Note: While the dialog item was indented, the output text is not.
- Indent output text by adding spaces in the template itself.



One Item Only

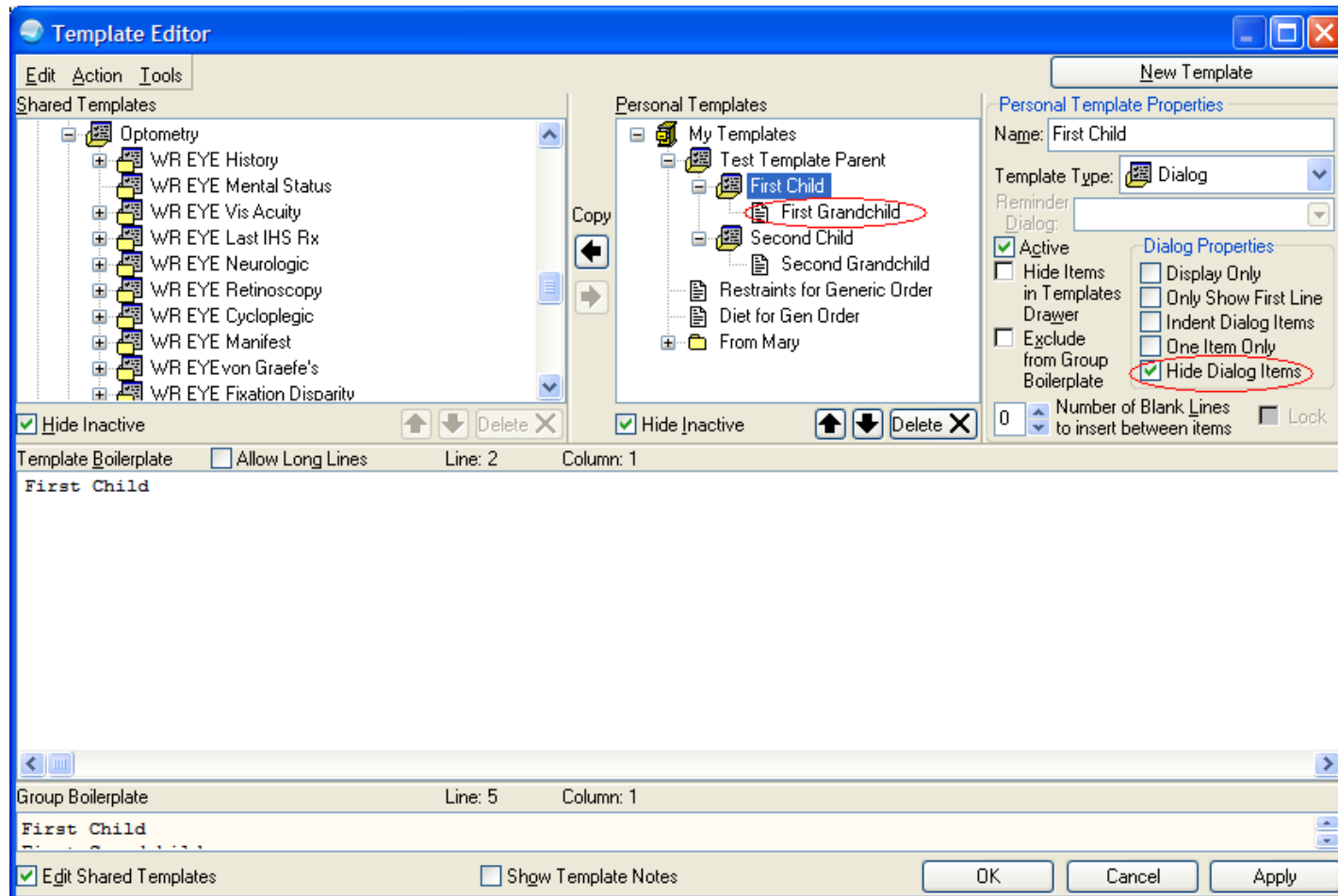
- This behaves the same as Radio Button, but works with dialogs instead of fields.



One Item Only



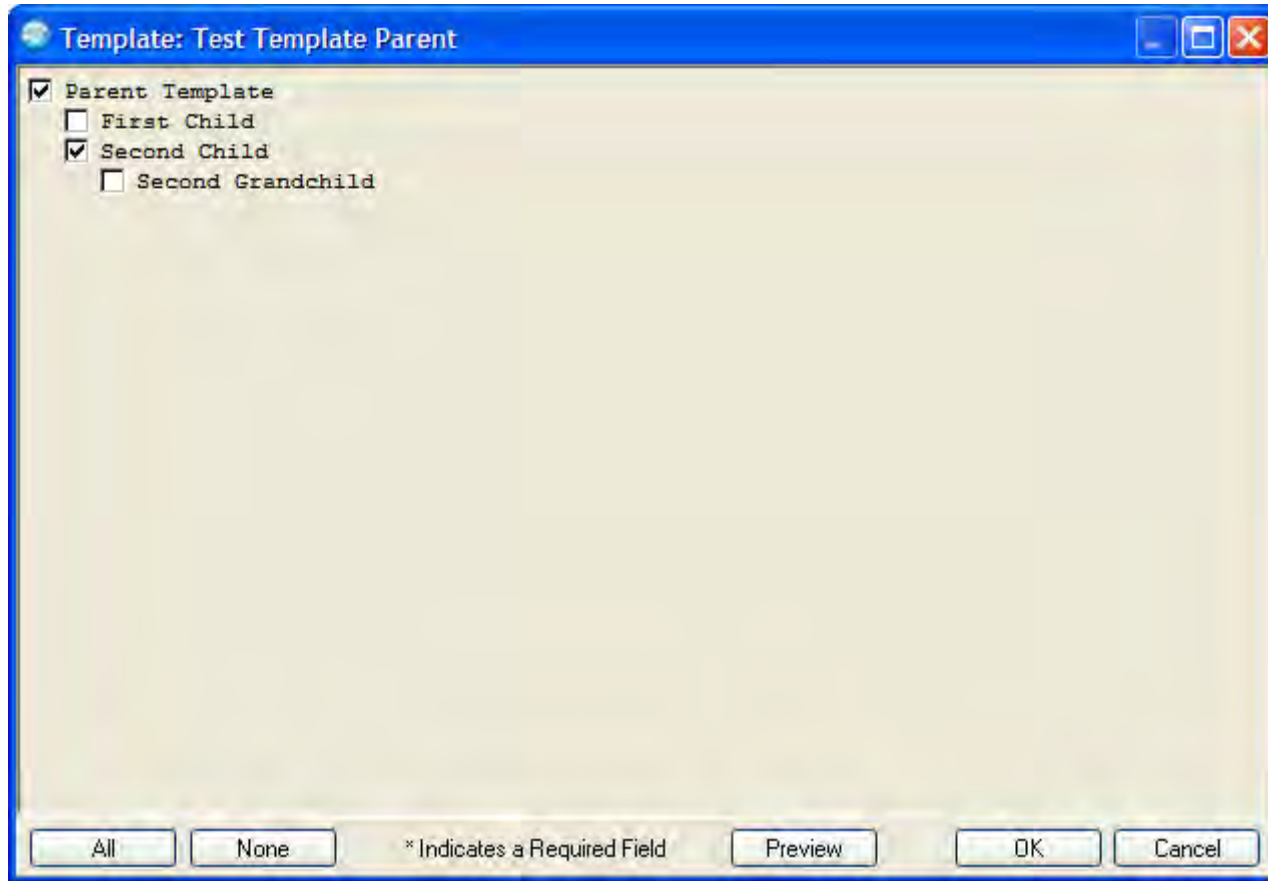
Hide Dialog Items



Hide Dialog Items

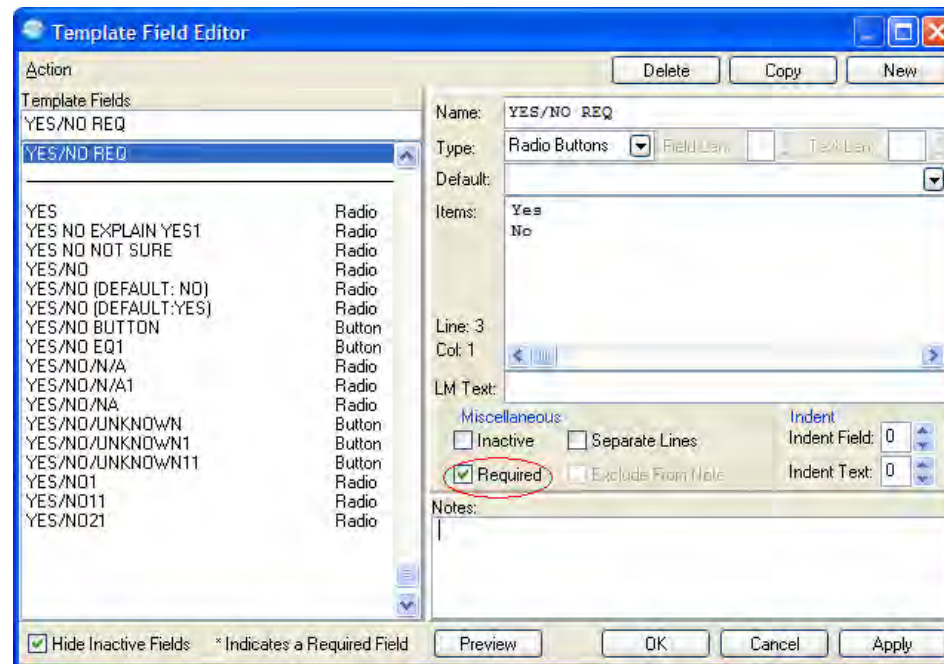


Hide Dialog Item



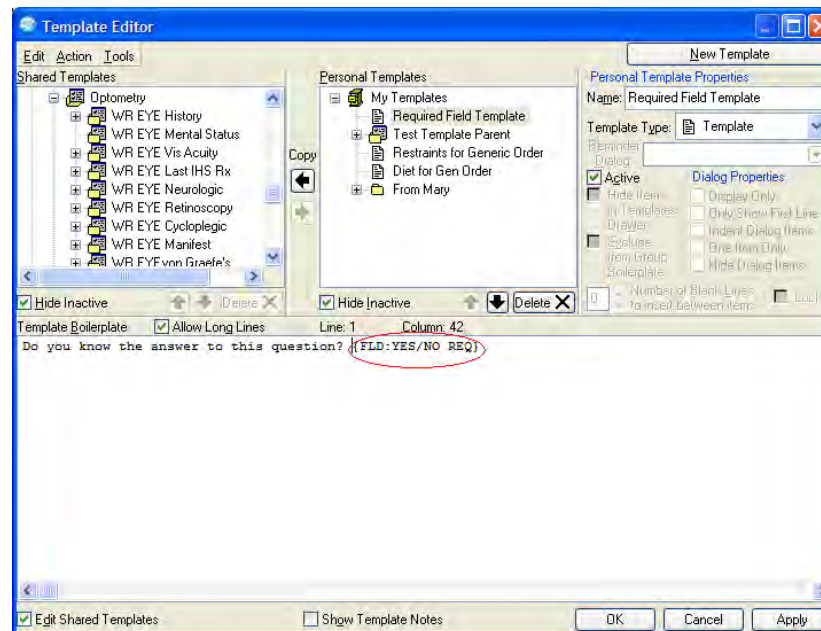
Required Field

1. Create the field with **Required** checked



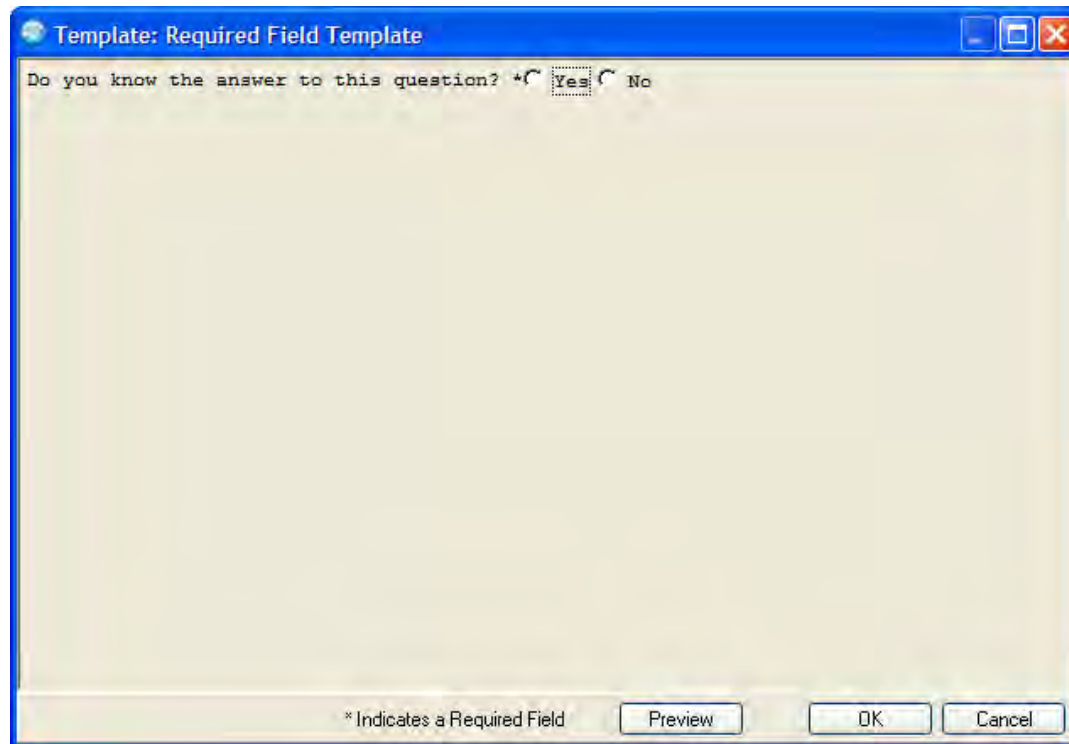
Required Field

2. Place the field in the template.



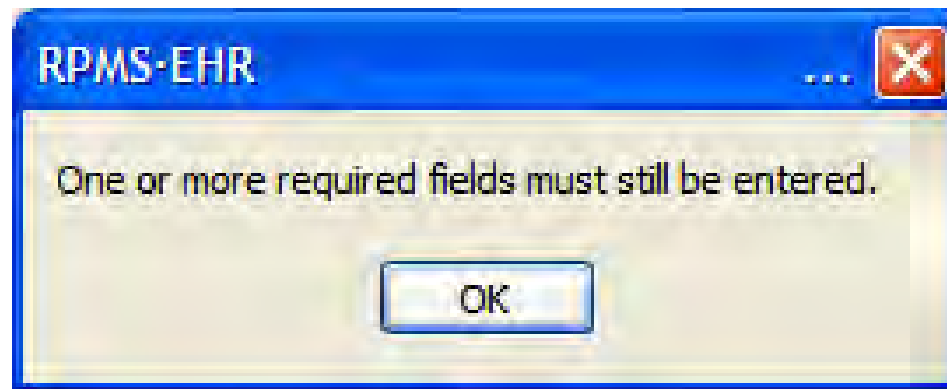
Required Field

3. Note the asterisk (*).



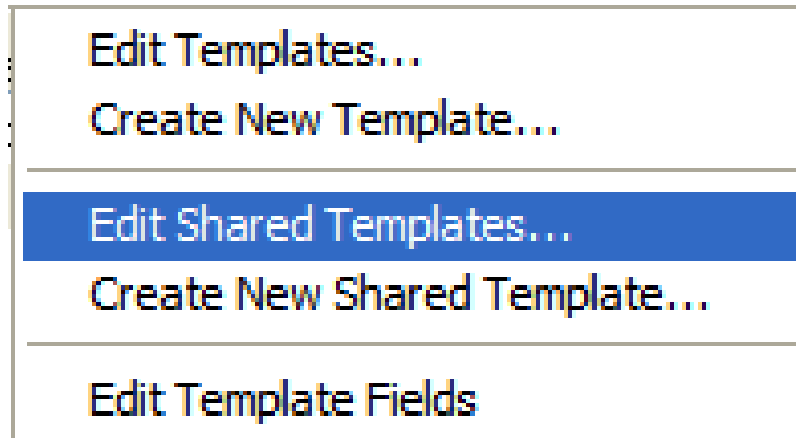
Required Field

- If the Required Field is not filled in:



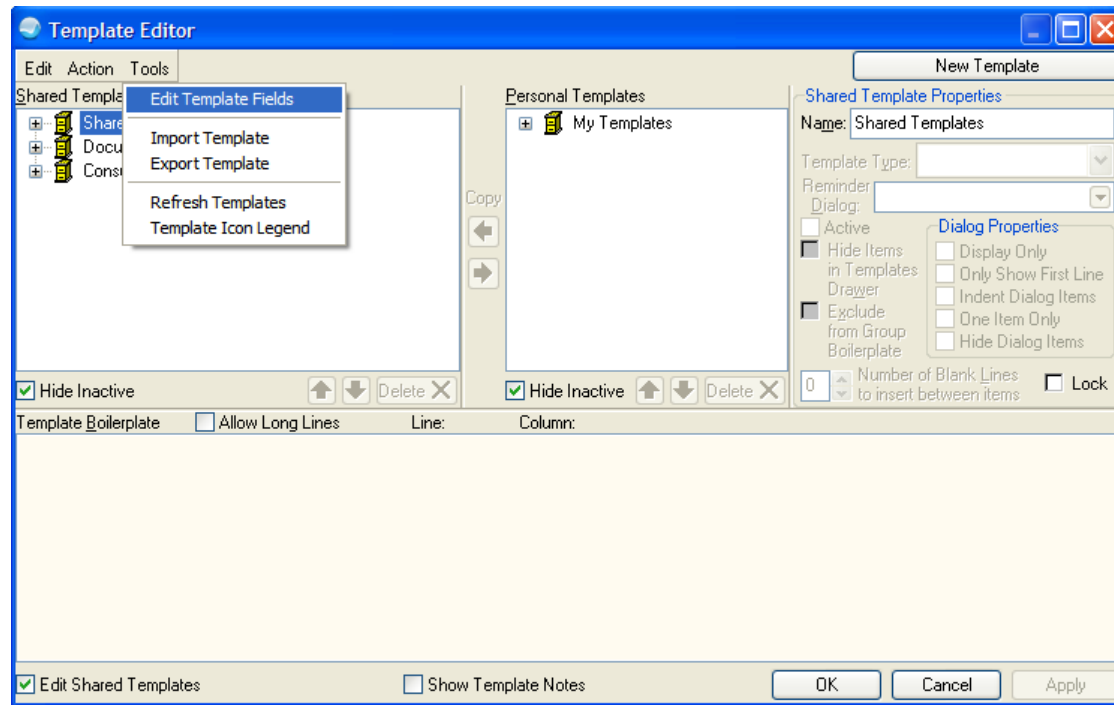
Creating a New Template Field

1. On the **Notes** tab, right click **Options** and select either **Edit Templates** or **Edit Shared Templates**.



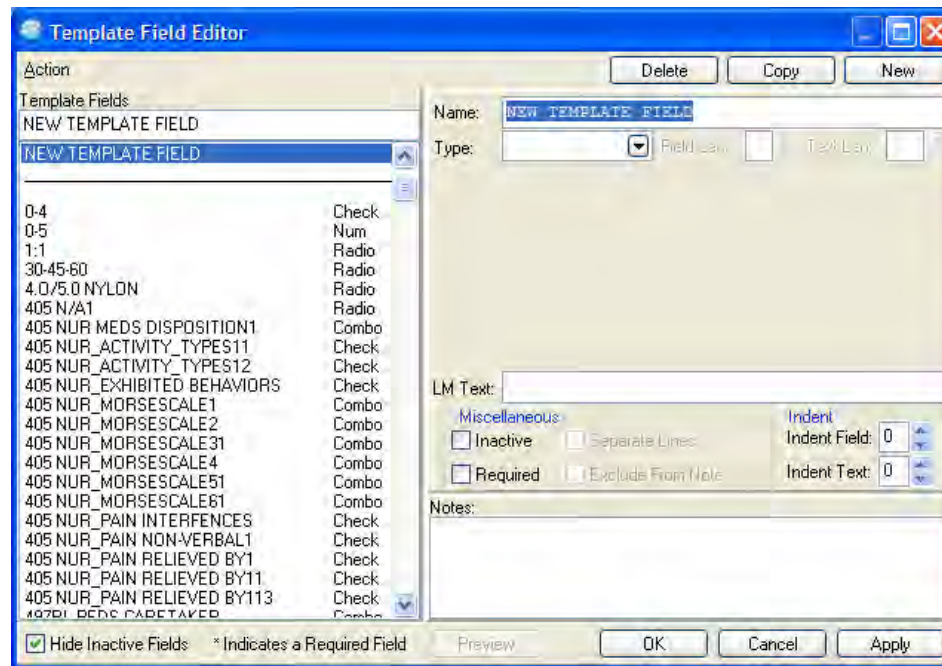
Creating a New Template Field

2. Within the **Template Editor**, click **Tools** and select **Edit Template Fields**.



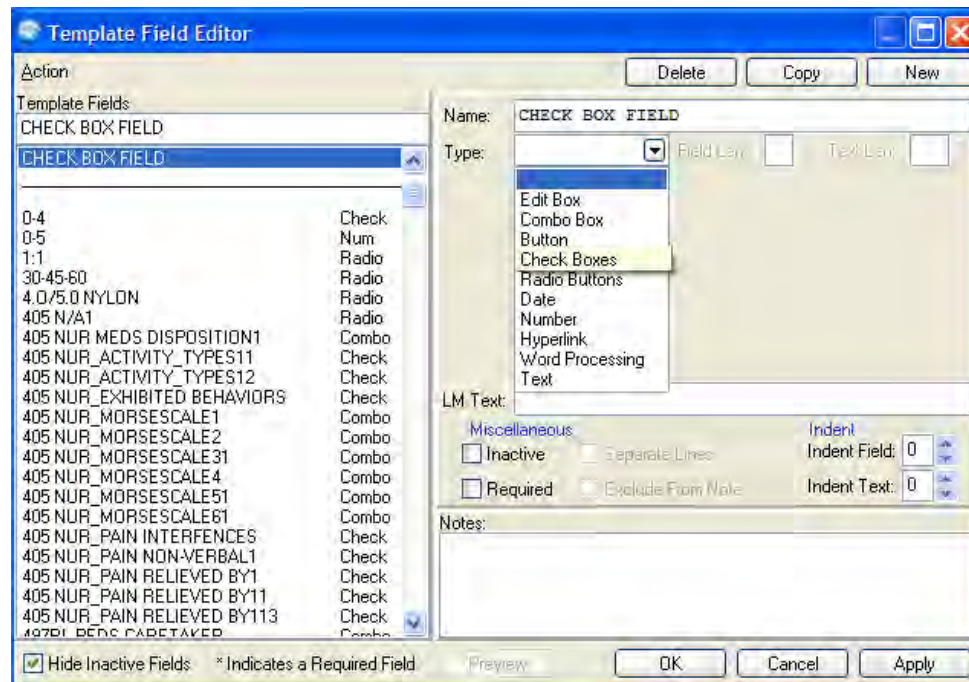
Creating a New Template Field

3. In the **Template Field Editor** select **New Template Field**.



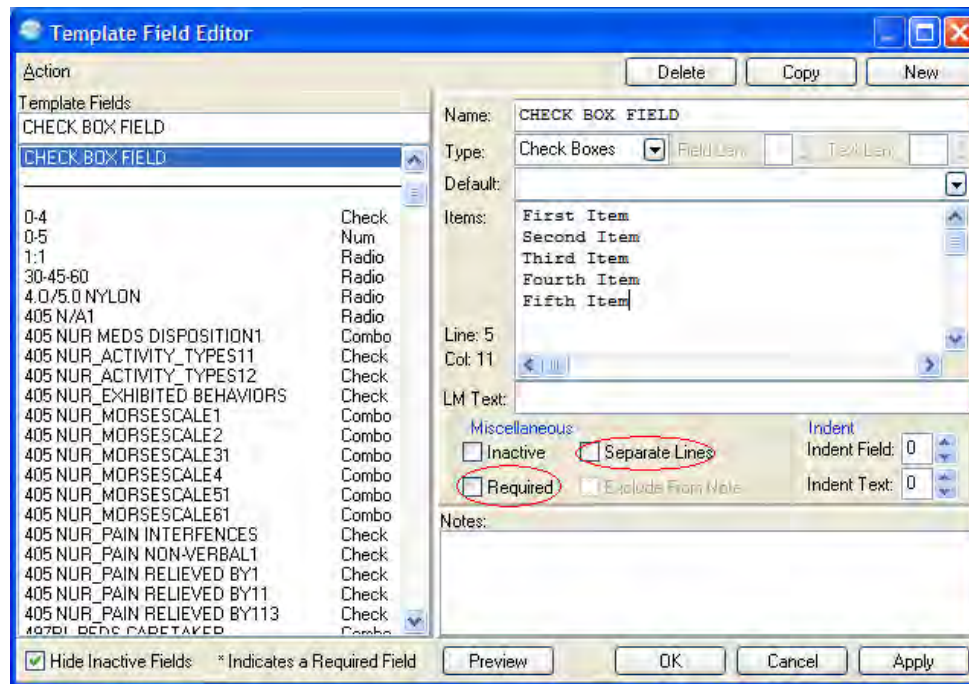
Creating a New Template Field

4. Type the field name in the Name field.
5. Select the Type.



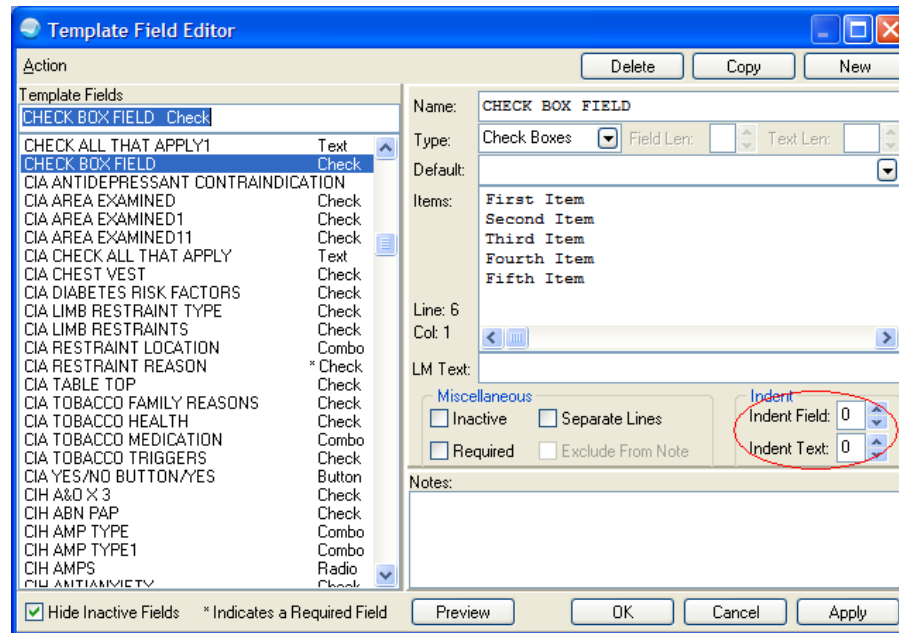
Creating a New Template Field

You may choose to indicate **Required** or **Separate Lines**.

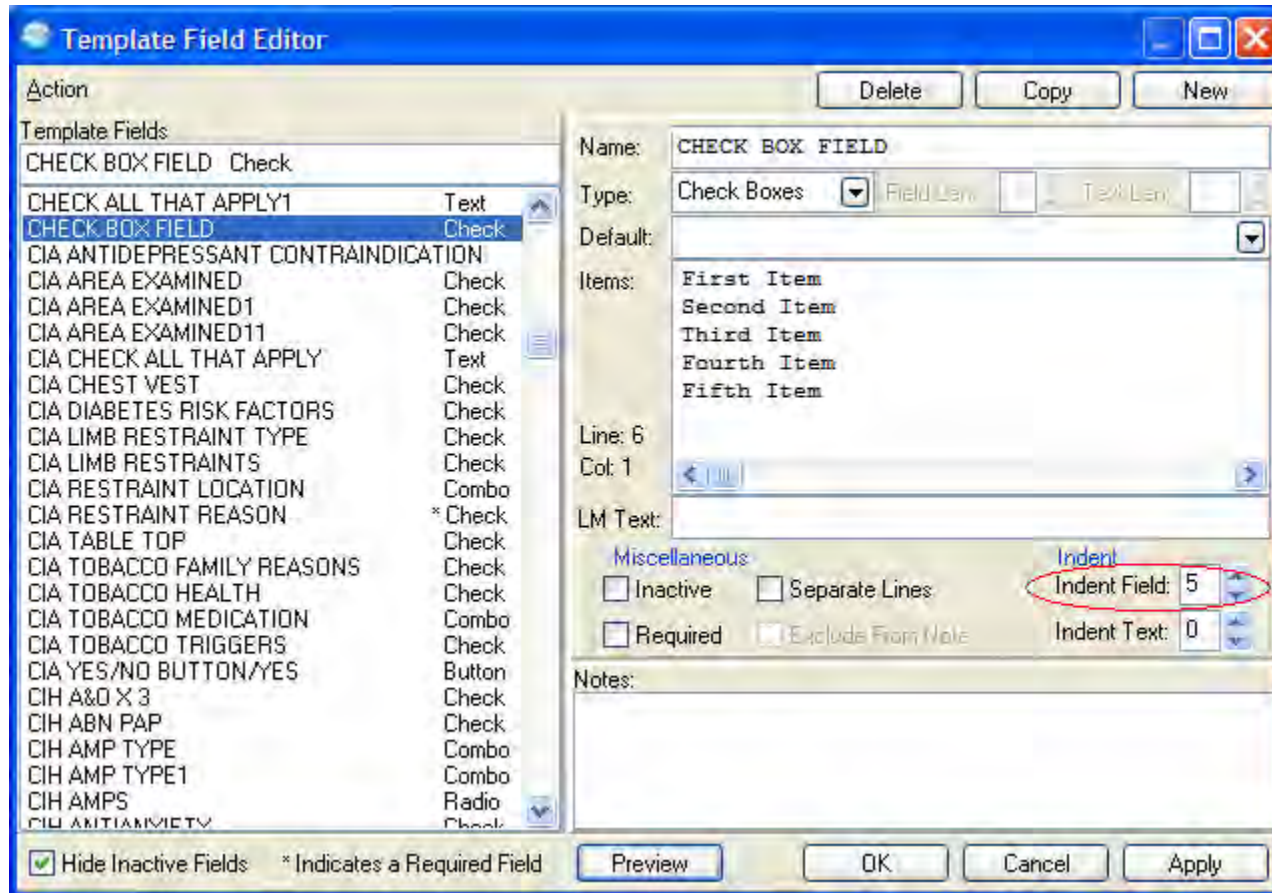


Indenting

TIU Templates support indenting of both the template field and the output text.



Indent Field

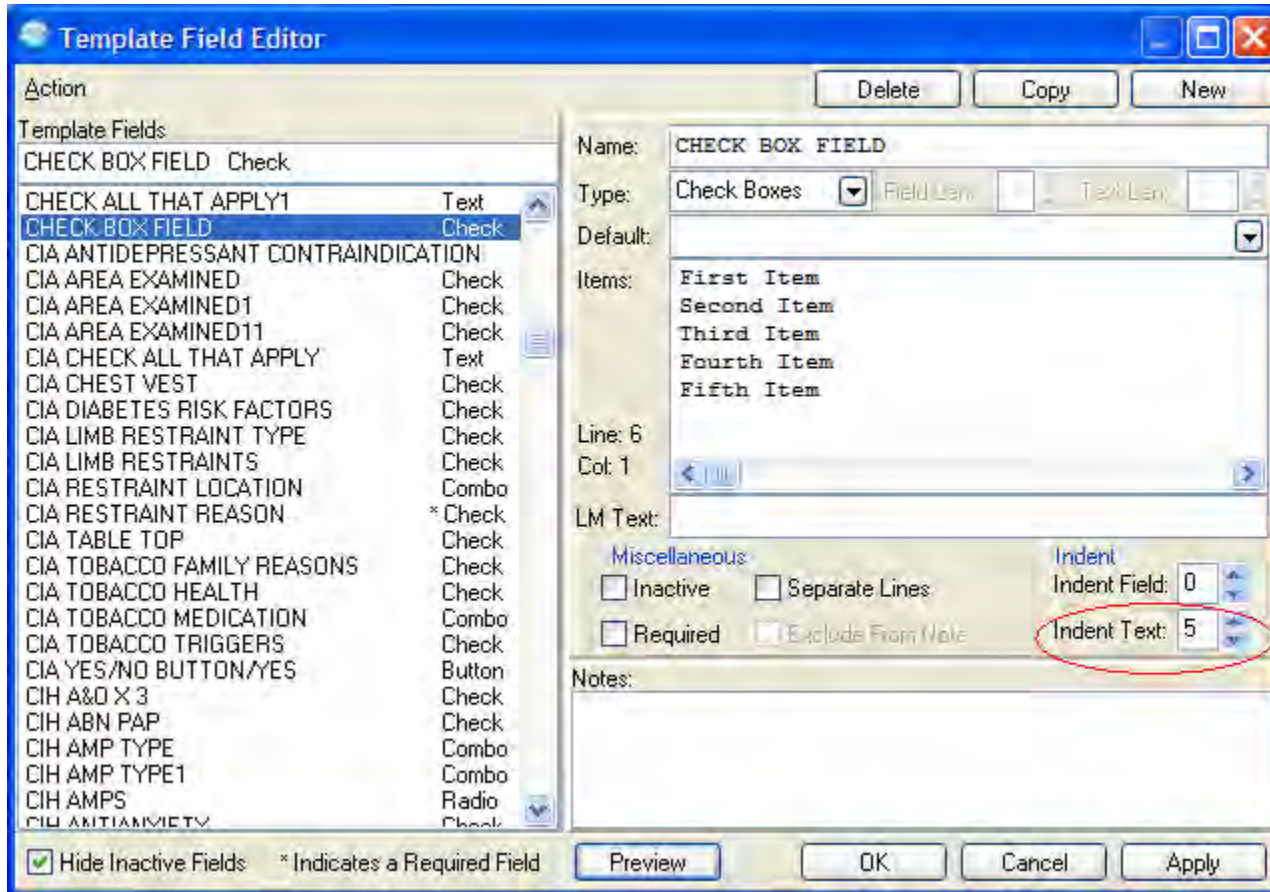


Indent Field

- The template items are indented five spaces.
- The output text is *not* indented.

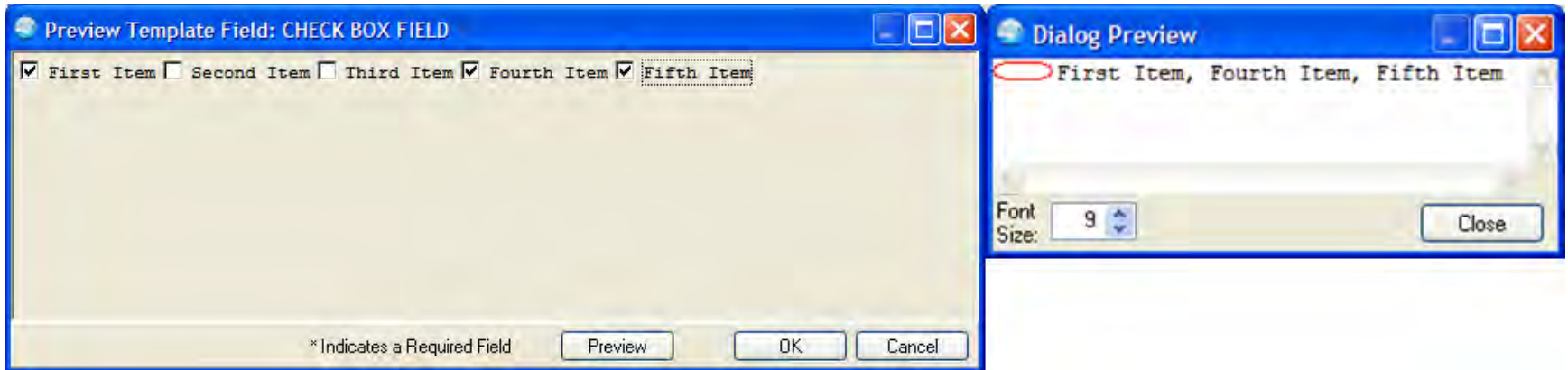


Indent Text



Indent Text

- The template items are *not* indented.
- The output text is indented five spaces.

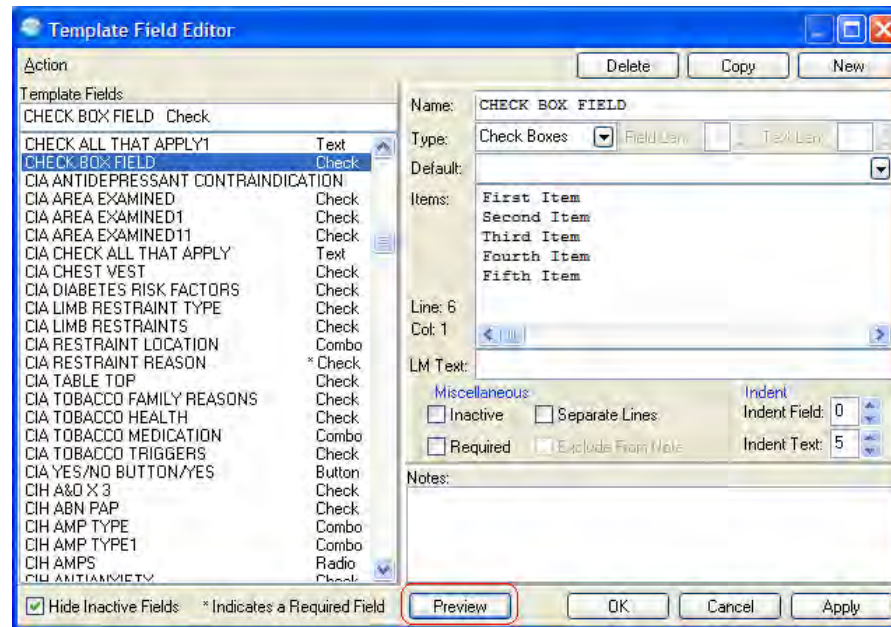


Indenting

- When creating a Template Field, you can use **Indent Field** only, **Indent Text** only, or both.

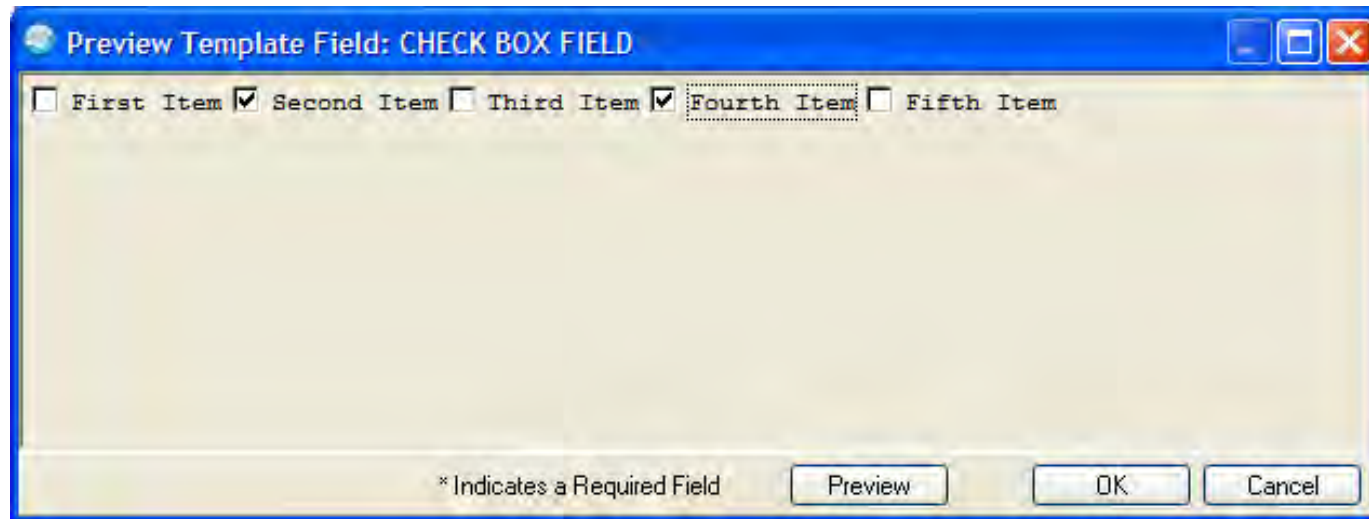
Previewing a New Template Field

- When creating a Template Field you may want to see how it will appear.
- To preview the field, click **Preview**.



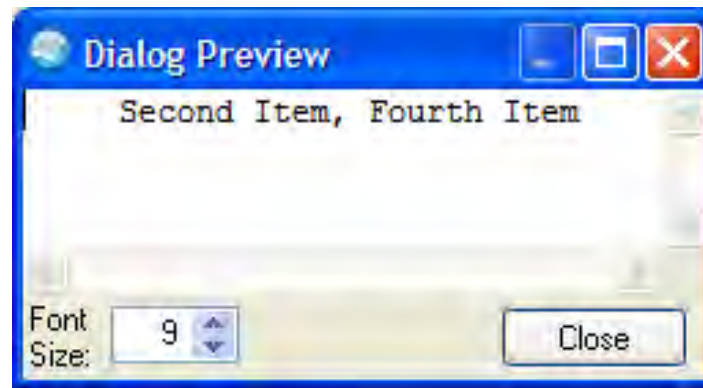
Previewing a New Template Field

- To preview the output text, click **Preview** again.



Previewing a New Template Field

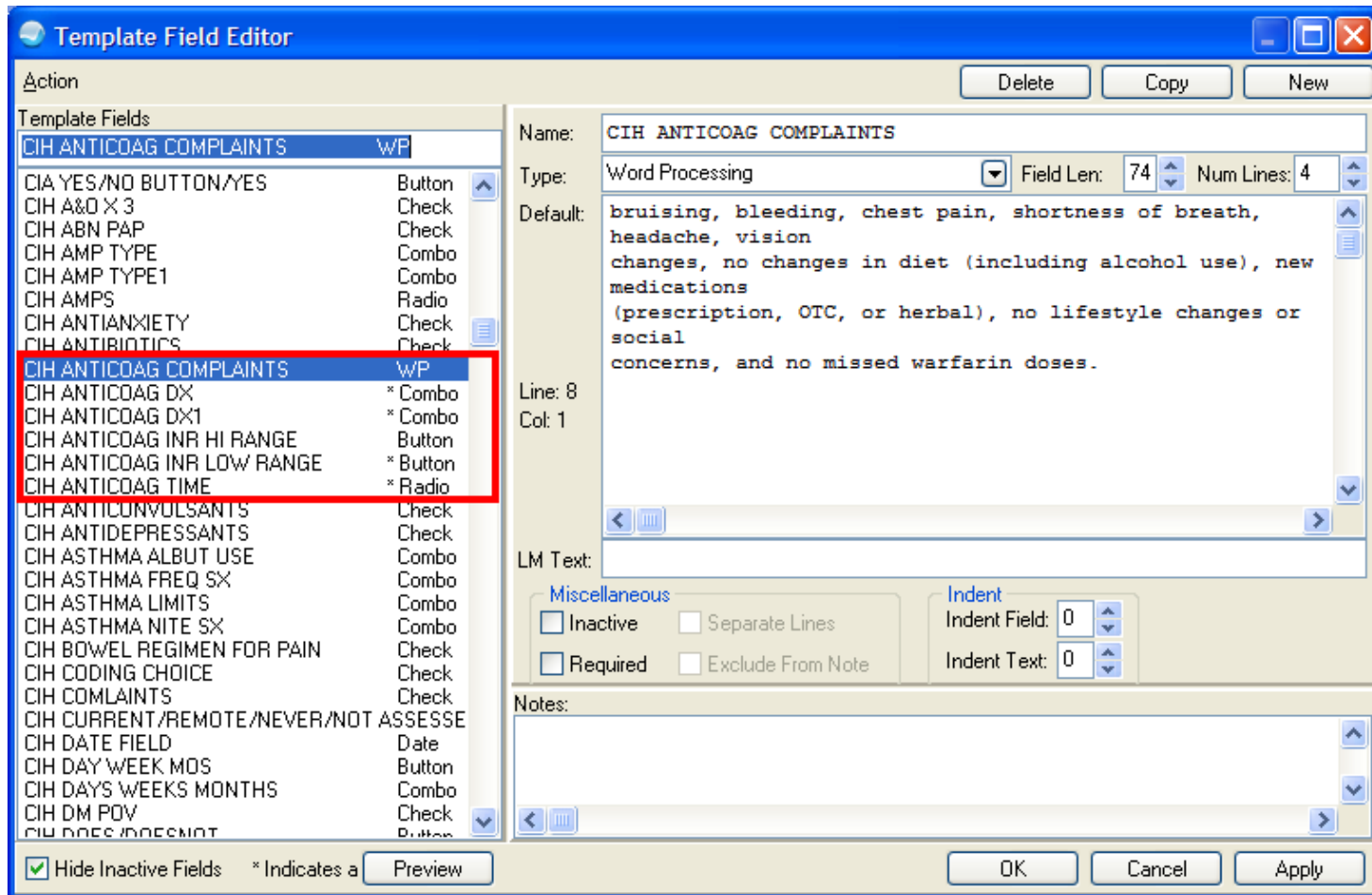
- Output Text:



Standardization

- It is recommended using a standard approach when creating new template fields.
- It is recommended using beginning text in fields so that related items group together in the list, making it easier to find them later when building the template.

Standardization



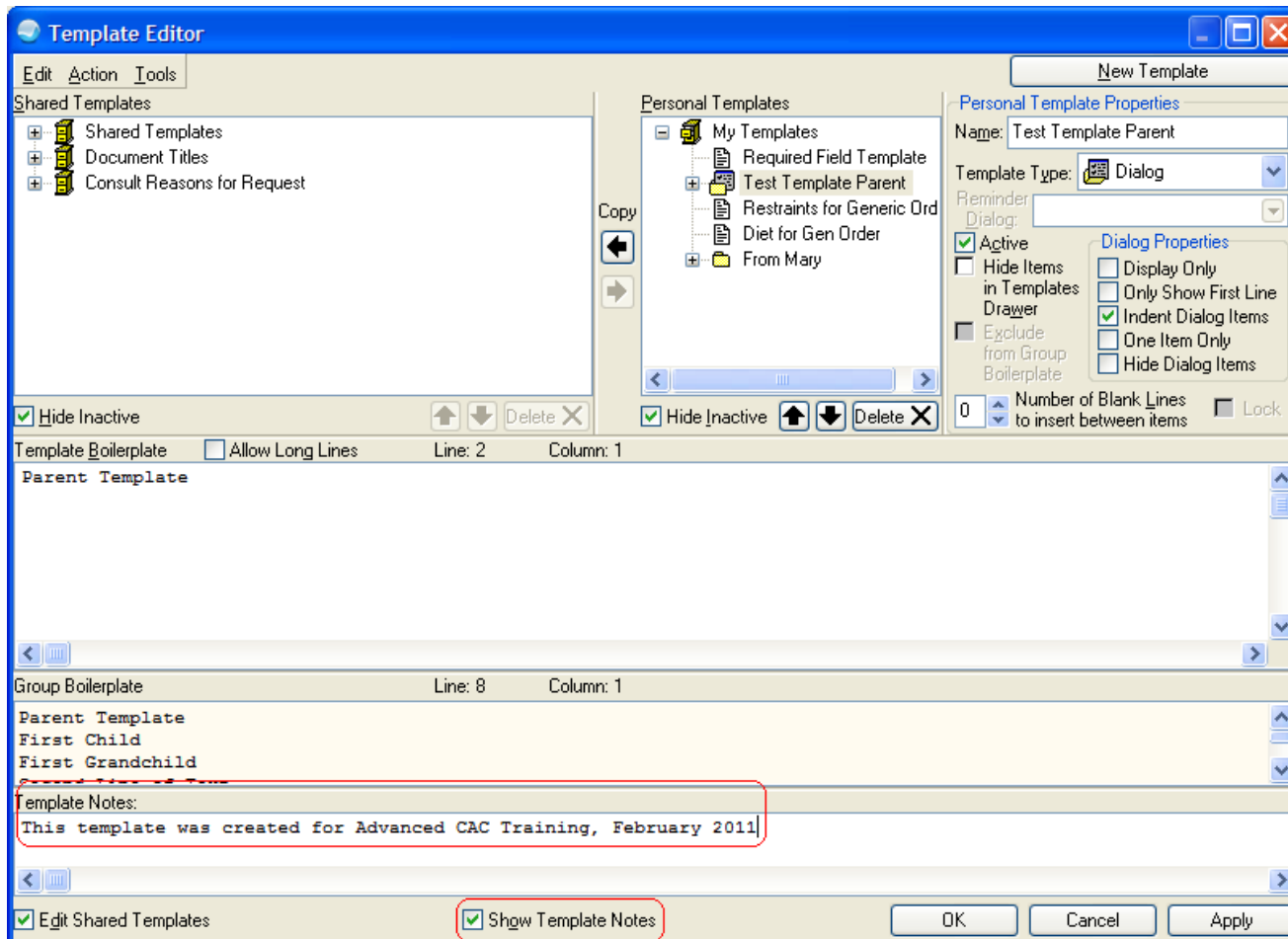
Appearance of TIU Templates

- It is possible to create TIU Templates that look good for Text Entry.
- It is possible to create TIU Templates that output good looking Text.
- But it is not always possible to create a TIU Template that does both at the same time.

Using Template Notes In the Template Editor

- To annotate a template to record why or when a change was made.
 - This can be particularly useful if more than one CAC edits templates.
 - This can also be where EHR Committee approval of the template is recorded.

Using Template Notes



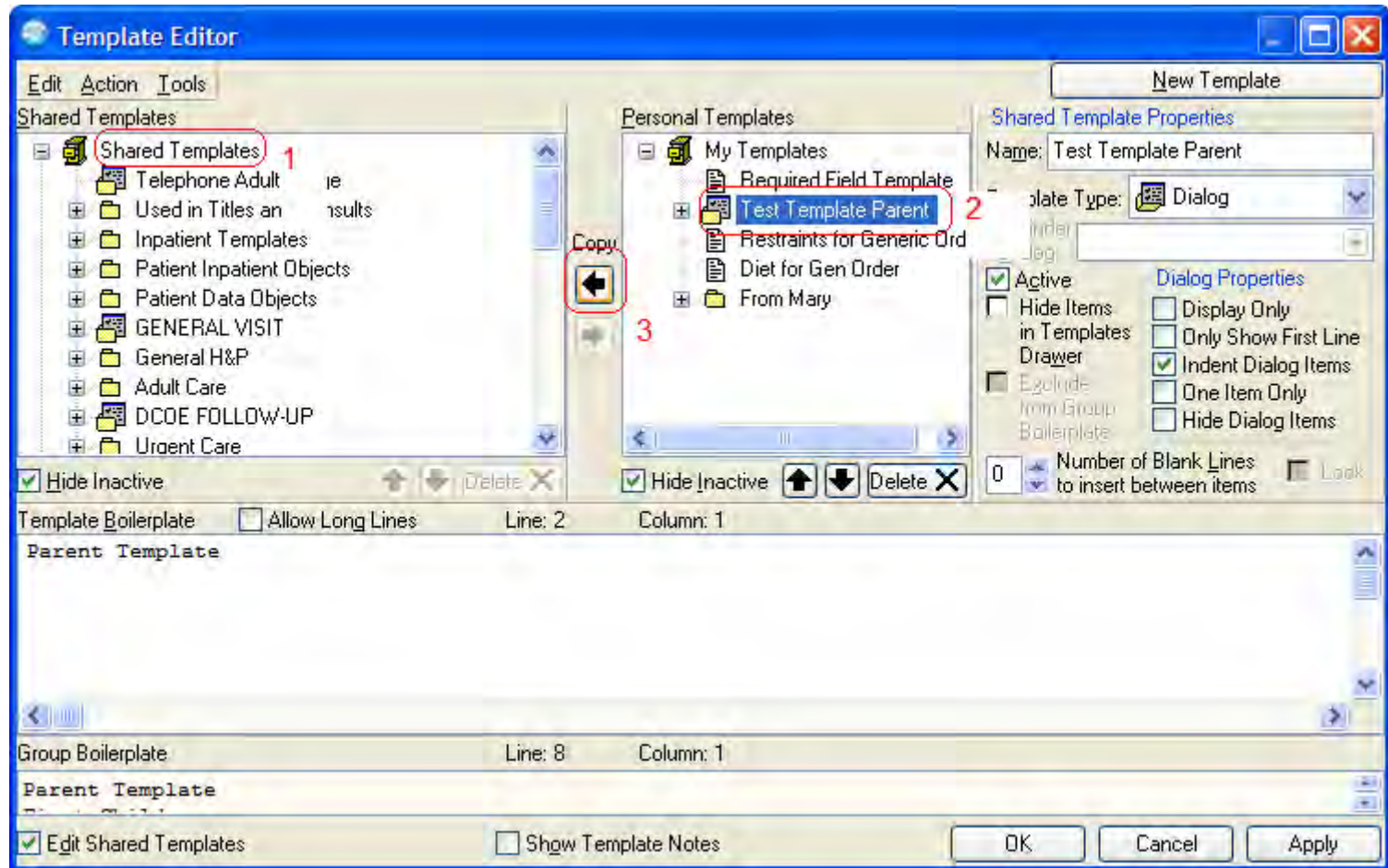
Using the Copy Button

- Templates can be created in the **My Templates** folder and then copied to the **Shared Templates** folder when completed.
- This action is not truly a copy, but more akin to creating a shortcut Link.
- After copying, editing either of these Templates, will change both!

Using the Copy Button

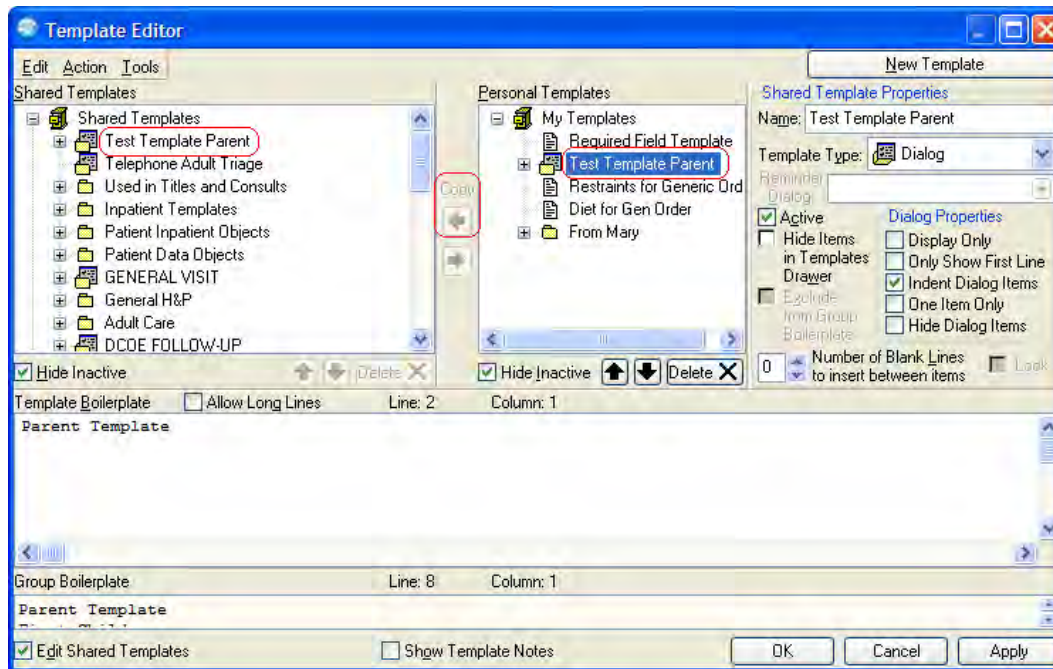
1. Click the destination folder (e.g. Shared Templates).
2. Click the template to copy.
3. Click **Copy**.

Using the Copy Button



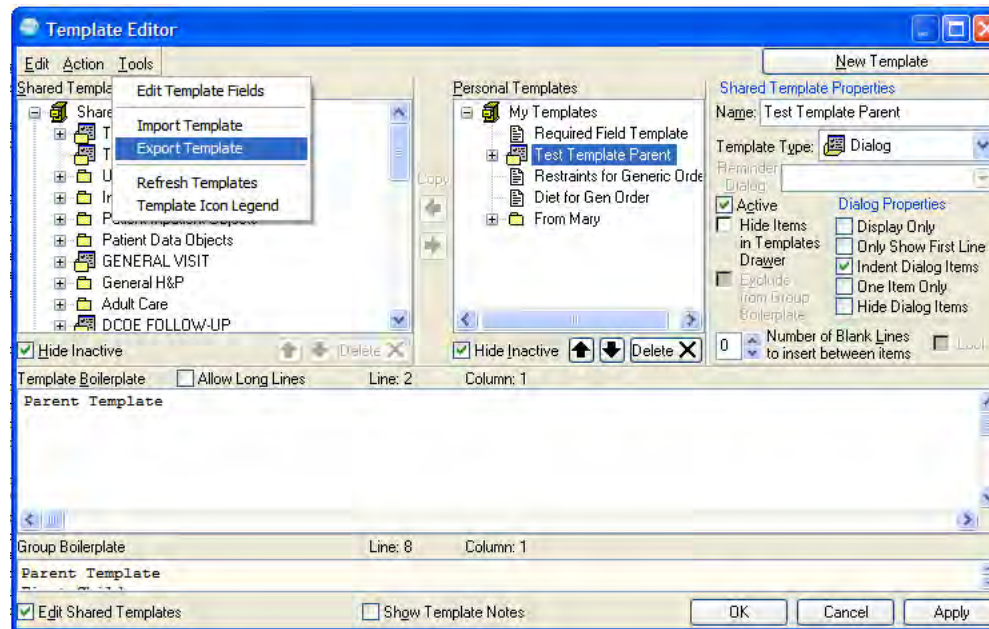
Using the Copy Button

- Note: After the copy is completed, the Copy button is grayed out.



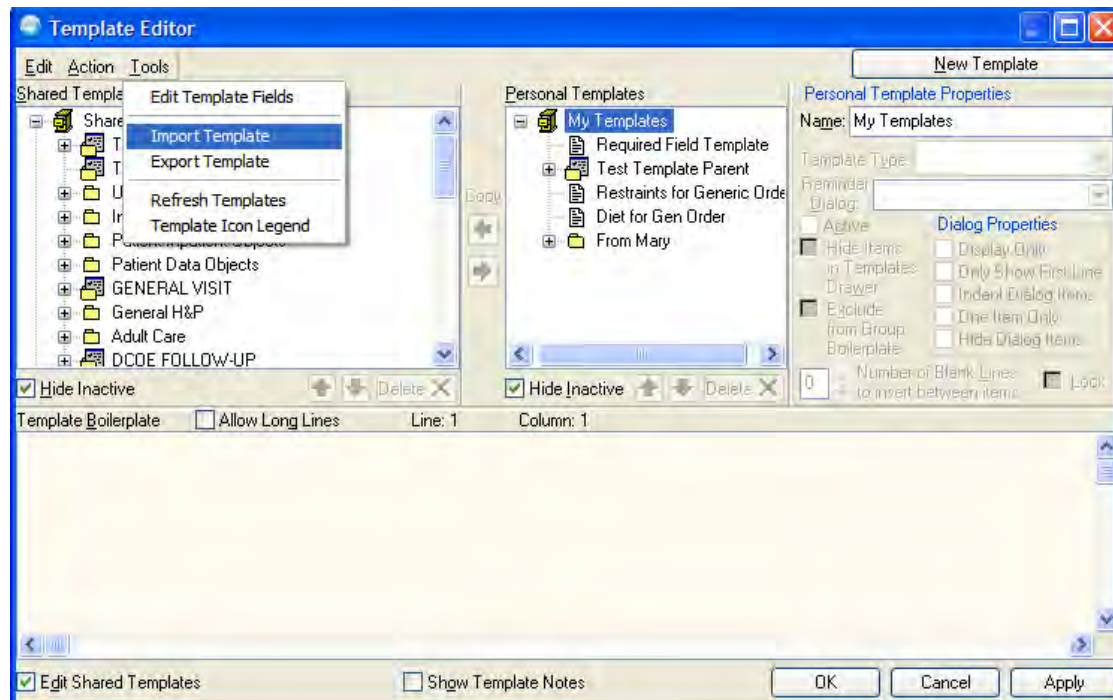
Importing and Exporting

- Export:



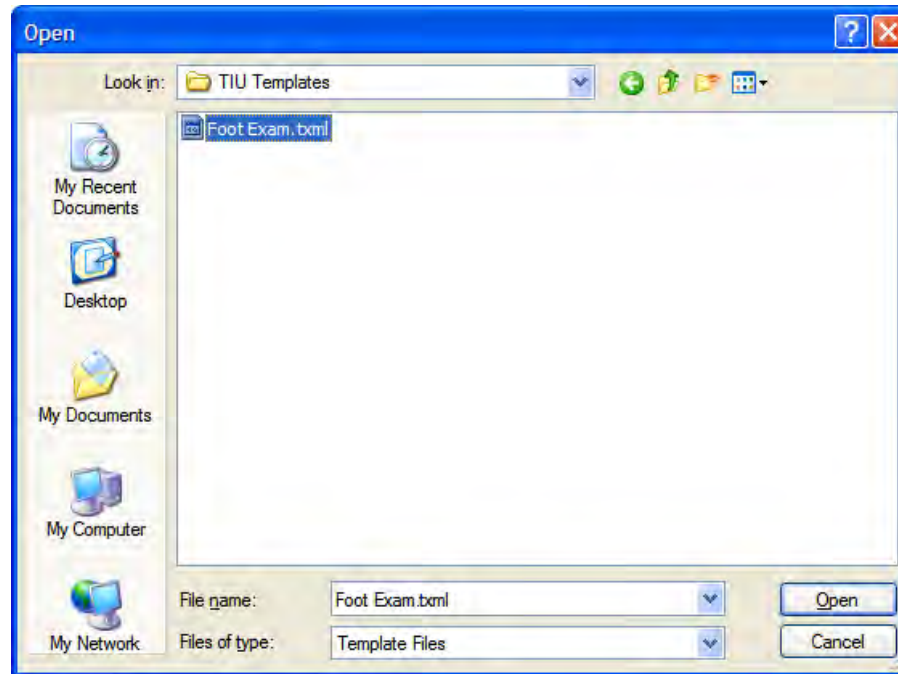
Importing and Exporting

- Import (first select destination folder):



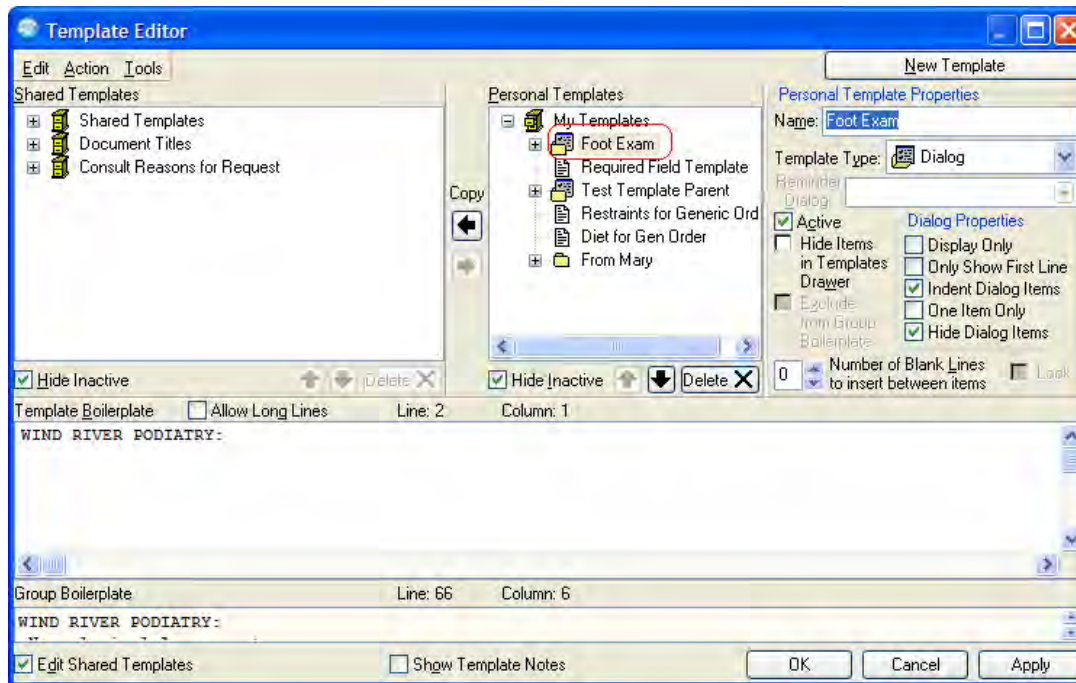
Importing and Exporting

- Import (TIU Templates are .txml files):



Importing and Exporting

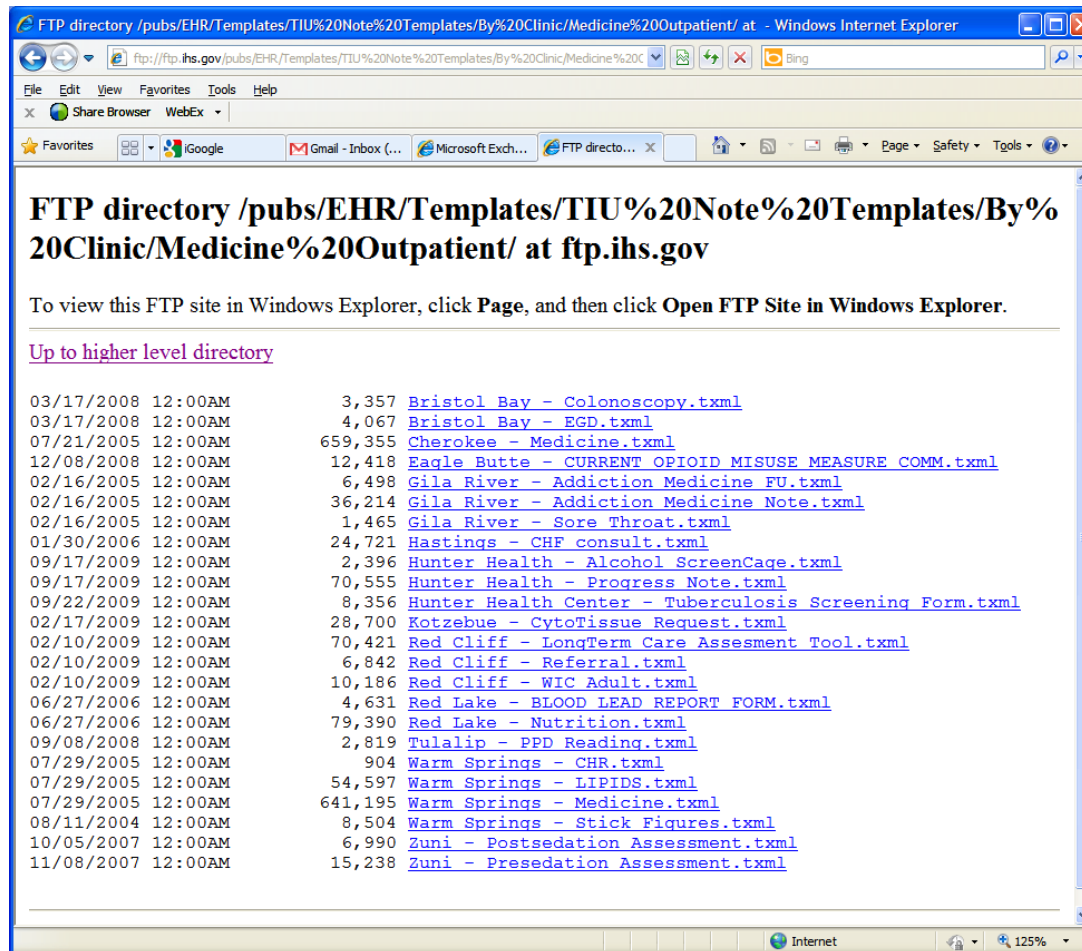
- Import:



Importing IHS Templates

- IHS uploads and stores TIU templates at its national FTP site.
- These templates are publicly accessible at:
<ftp://ftp.ihs.gov/pubs/EHR/Templates/TIU%20Note%20Templates/>
- When returning to the IHS FTP site remember to click View > Refresh to update the browser's cache.

Importing IHS Templates



Importing and Exporting

- Double clicking an exported .txml file, will attempt to open it using the browser because it is an XML type file.
- Only TIU within EHR can properly process a .txml file.
- Those who have created HTML will see similarities in raw exported TIU files.

Raw TIU Template File

```
<CPRS_TEMPLATE>
  <TEMPLATE NAME="PHN Consult">
    <TYPE>G</TYPE>
    <STATUS>A</STATUS>
    <DIALOG>1</DIALOG>
    <BOILERPLATE_TEXT>
      <p>THIS PATIENT IS BEING
      REFERRED TO PHN SERVICES
      FOR:</p>
      <p></p>
      <p>{FLD:PHN CONSULT}</p>
      <p></p>
      <p>{FLD:VA*W-P8LINES}</p>
    </BOILERPLATE_TEXT>
  </TEMPLATE>
  <TEMPLATE_FIELDS>
    <FIELD NAME="PHN CONSULT">
      <TYPE>X</TYPE>
      <INACTIVE>0</INACTIVE>
      <LENGTH>0</LENGTH>
```

```
<DEFAULT_INDEX>0</DEFAULT_INDEX>
  <REQUIRED>0</REQUIRED>

  <SEPARATE_LINES>0</SEPARATE_LIN
  ES>
    <MAX_LENGTH>0</MAX_LENGTH>
    <INDENT>0</INDENT>
    <PAD>0</PAD>
    <MIN_VALUE>0</MIN_VALUE>
    <MAX_VALUE>0</MAX_VALUE>
    <INCREMENT>0</INCREMENT>
    <ITEMS>
      <p>Abnormal Pap</p>
      <p>Communicable Disease</p>
      <p>Gestational Diabetes</p>
      <p>Newborn</p>
      <p>Positive HCG</p>
      <p>Postpartal</p>
      <p>Other</p>
    </ITEMS>
```

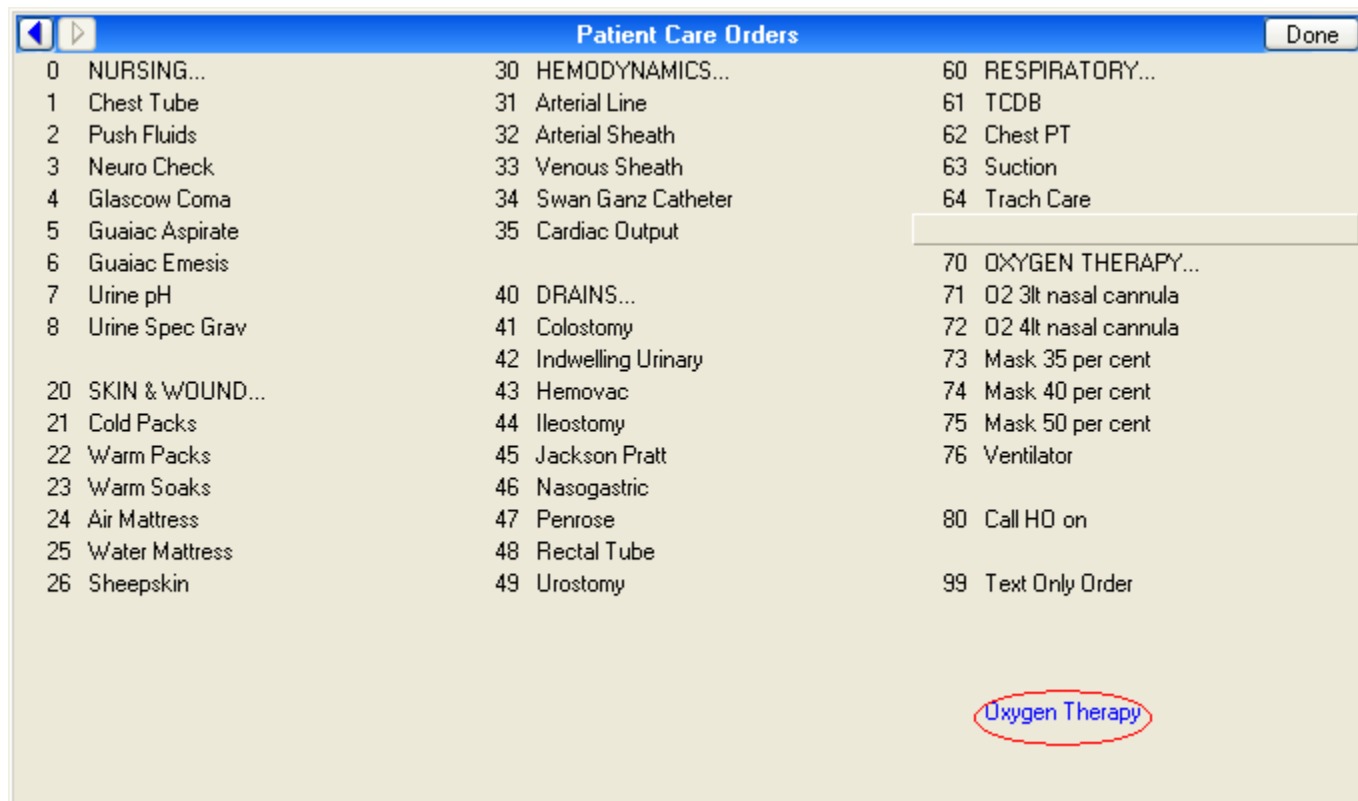
Exported TIU Templates

When exported, TIU Templates are very small text files that can be sent as e-mail attachments.

Other Uses for Templates

- Where can template fields be used in addition to progress notes?
 - Discharge summaries
 - Quick orders that have free text fields (e.g., comments)
 - Generic orders that have word processing fields
 - Consult reasons for request (using template editor)
 - Reminder dialogs

Template Fields in Generic Order



Template Fields in Generic Order

Reason for Request: OXYGEN THERAPY

Type:

Rate: L/min

Required Field Preview OK Cancel

Reason for Request: OXYGEN THERAPY

Type:

Rate:

- Nasal Cannula
- Rebreather
- Non-Rebreather
- Venti-Mask

Required Field Preview OK Cancel

Template Fields in Generic Order

A dialog box titled "Reason for Request: OXYGEN THERAPY" with standard Windows window controls (minimize, maximize, close). The main area contains a dropdown menu for "Type" set to "Nasal Cannula" and a text input field for "Rate" containing the number "3". To the right of the rate field are three radio buttons and the unit "L/min". At the bottom, there is a label "Required Field" and three buttons: "Preview", "OK", and "Cancel".

A dialog box titled "Oxygen Therapy" with standard Windows window controls. It features an "Order:" field containing the text "Type: Nasal Cannula" and "Rate: 3 L/min". Below this are two date/time selection fields: "Start Date/Time:" with the value "NOW" and "Stop Date/Time:". At the bottom, there is a summary area showing "OXYGEN THERAPY" and "Order: Type: Nasal Cannula" and "Rate: 3 L/min". To the right of the summary are two buttons: "Accept Order" and "Quit".

Template Fields in Generic Order

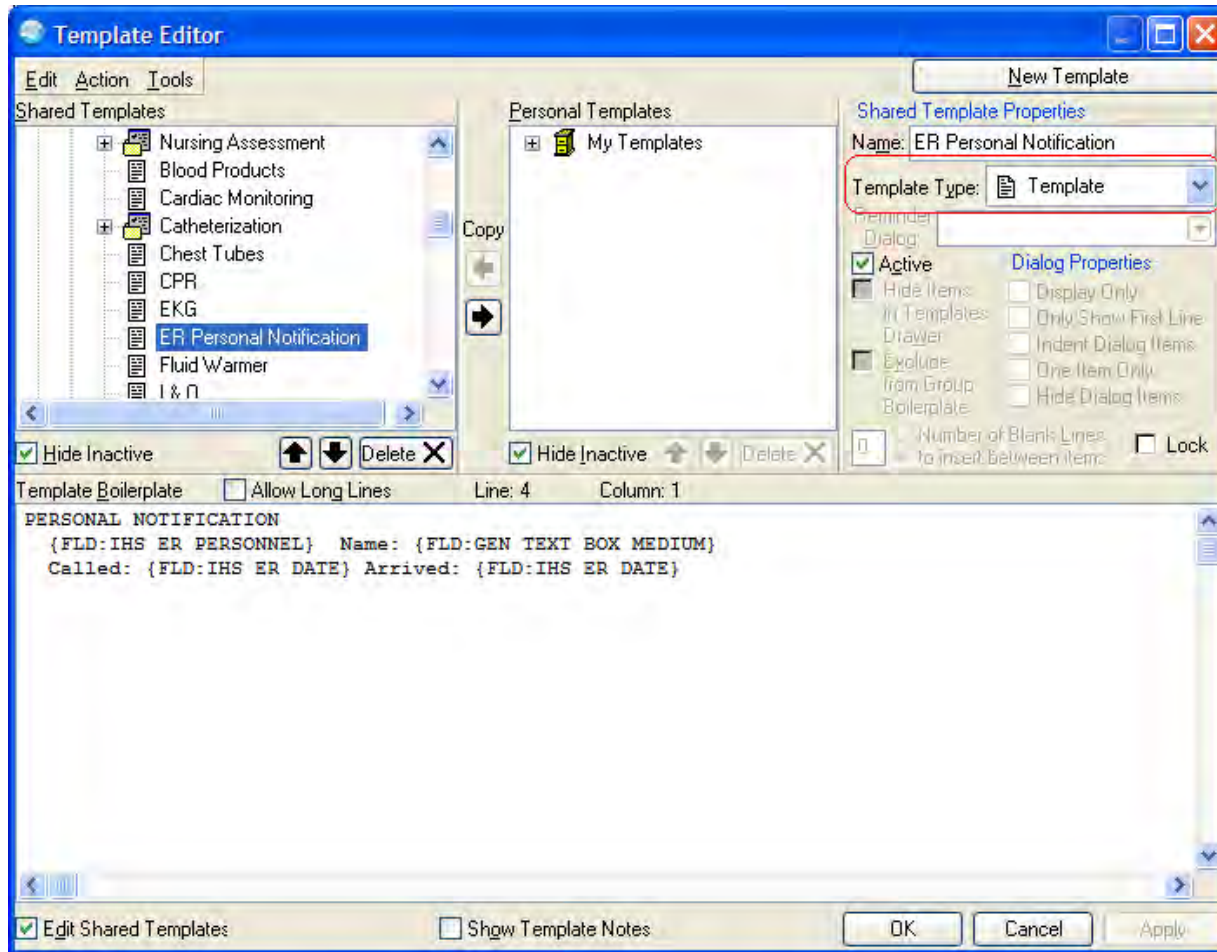
Current Orders (Active & Pending Status Only) - ALL SERVICES

Service	Order	Duration	Provider	Nurse	Clerk	Chart	Status
Nursing	>> OXYGEN THERAPY Order: Type: Nasal Cannula Rate: 3 L/min Start Date/Time: NOW *UNSIGNED*	Start: NOW	Taylor,P				unreleased

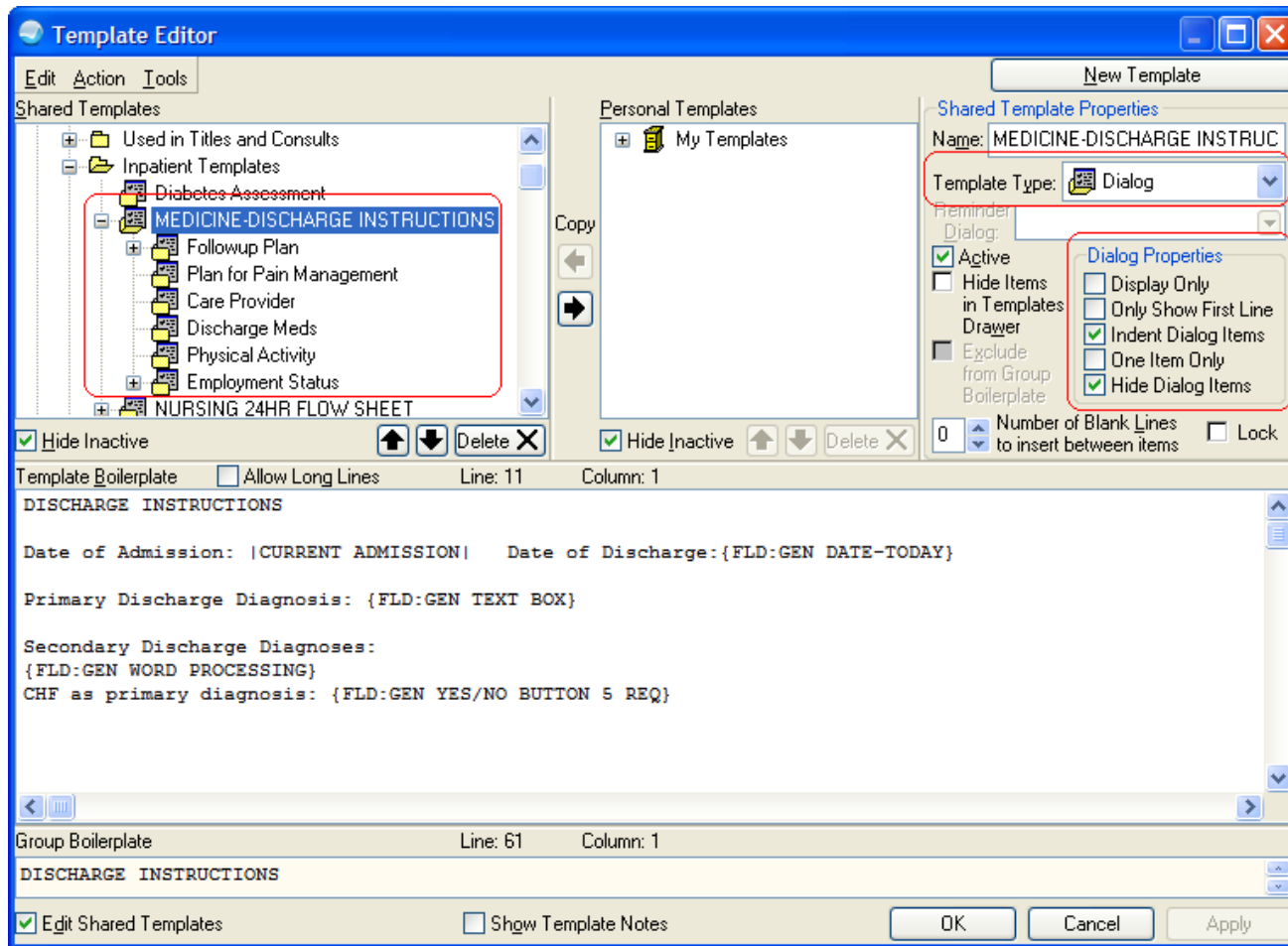
Review of Template Types

- Simple Template
- Dialog Templates with Advanced Formatting:
 - Hiding Dialog Items
 - One Item Only (Radio Button Dialogs)
 - Explanatory Text excluded from output
 - Indenting
 - Items on Separate Lines
- Allow Long Lines in Template

Simple Template



Complex Dialog Template





Questions and Discussion