

THE INDIAN HEALTH SERVICE

# RPMS EHR CAC Review



## TIU Templates Components

Superior Health Information Management  
Now and for the Future

# 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.

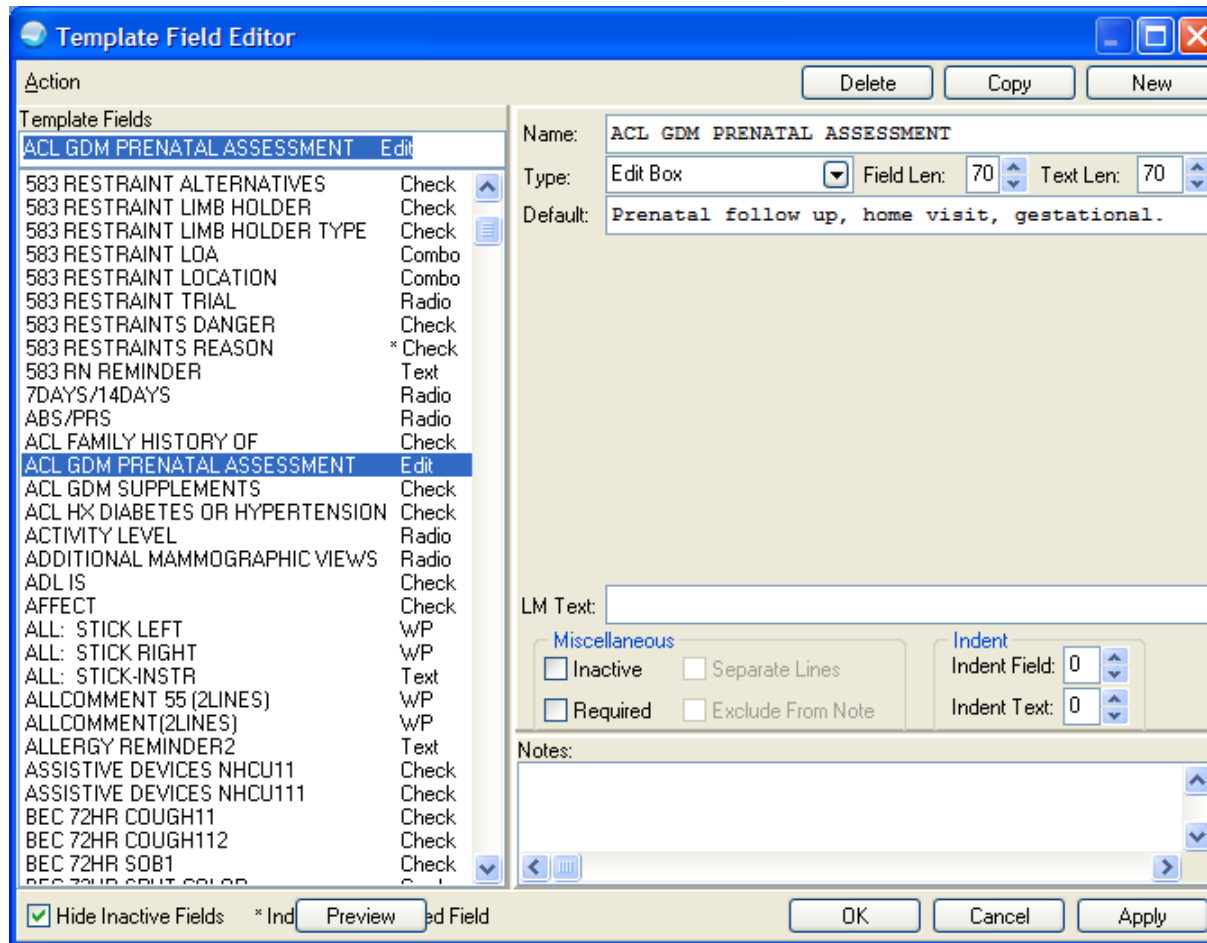
# Template Field Availability

- 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.

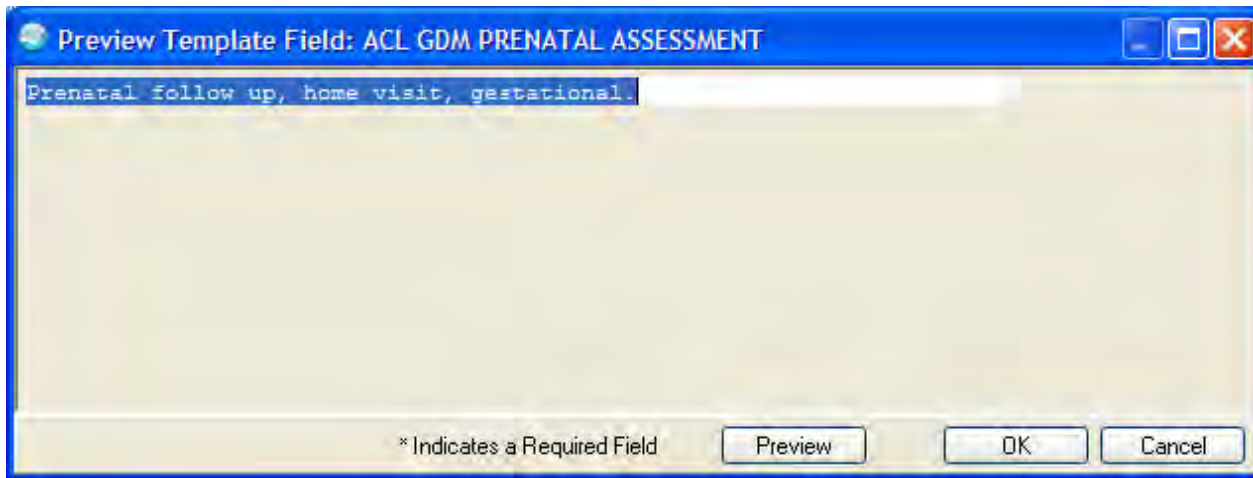
# Template Field Types

- 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

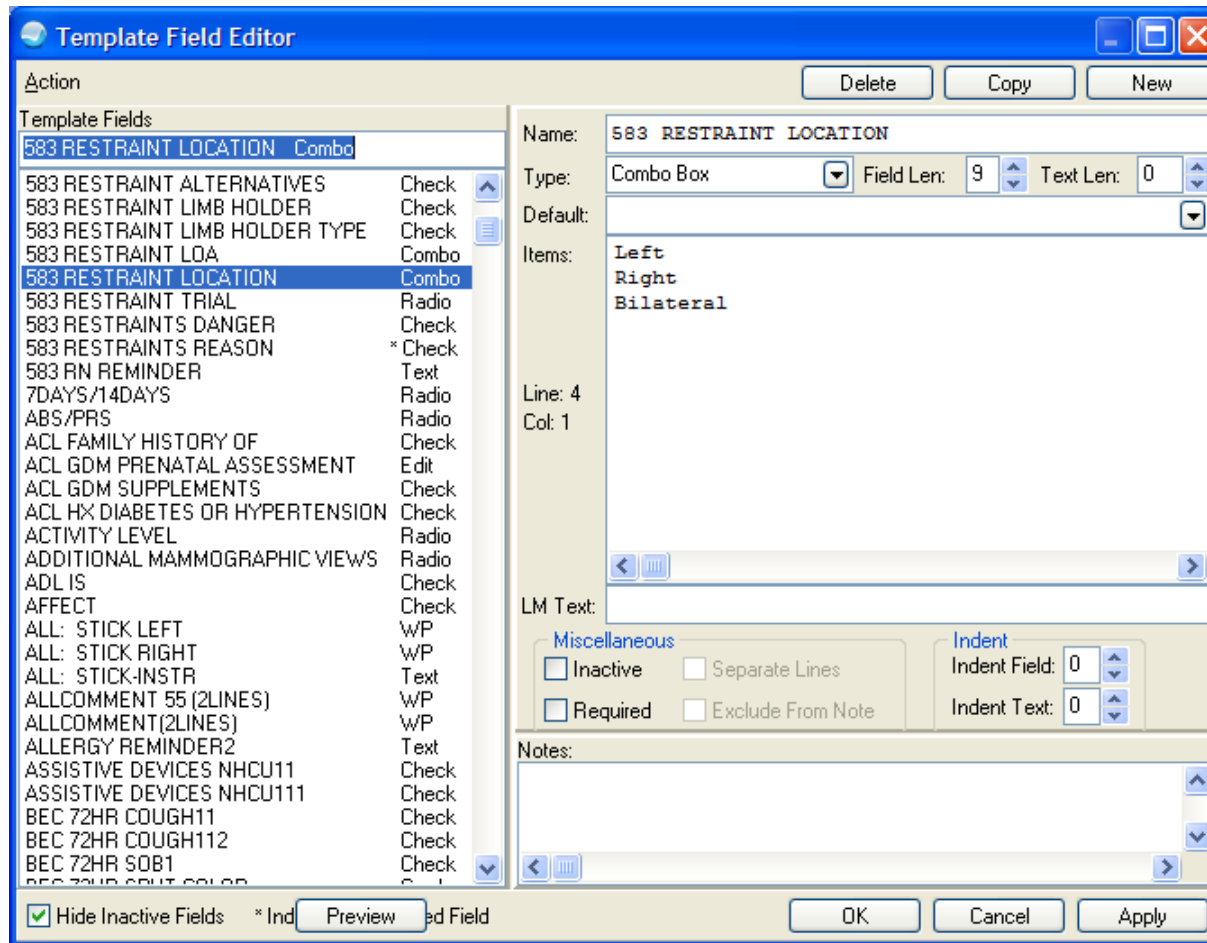
# Edit Box



# Edit Box Preview



# Combo Box

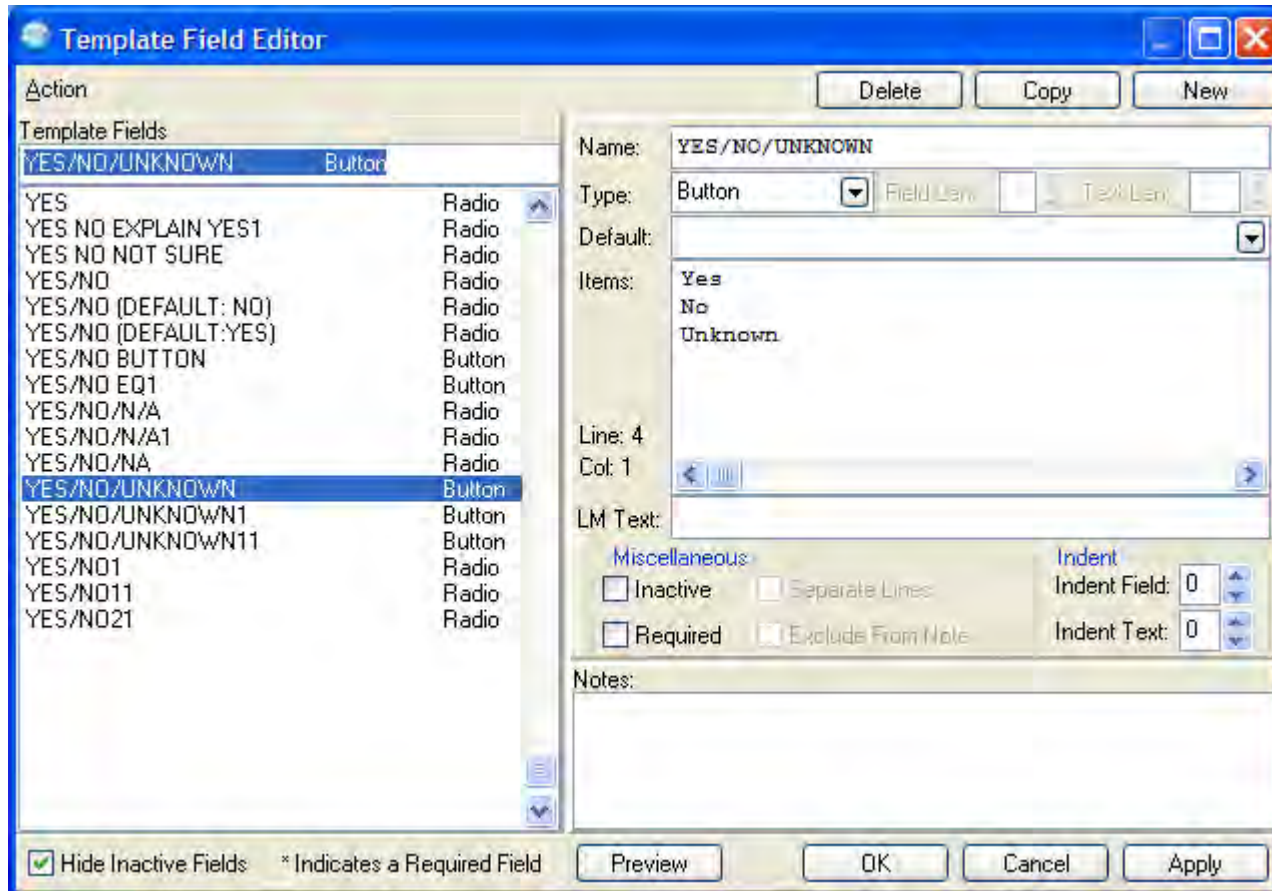


# Combo Box (Drop Down) Preview

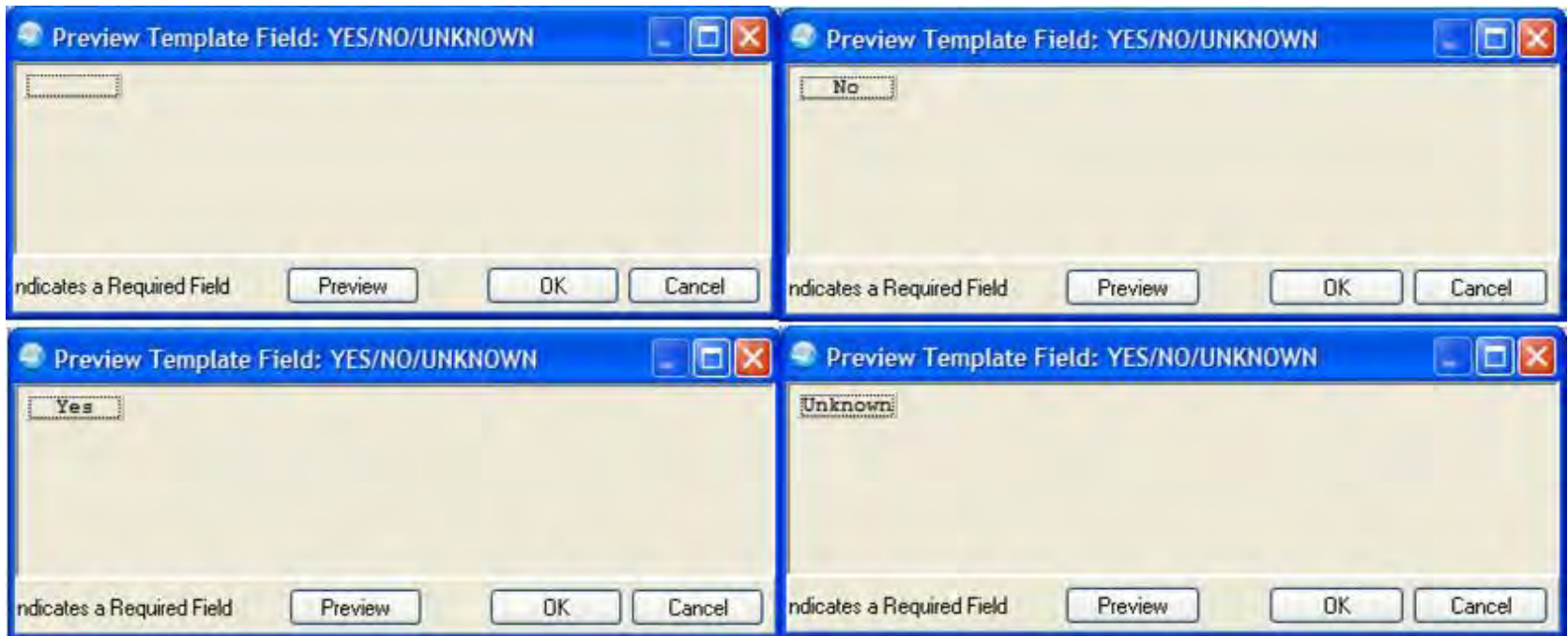




# Button



# Button Preview



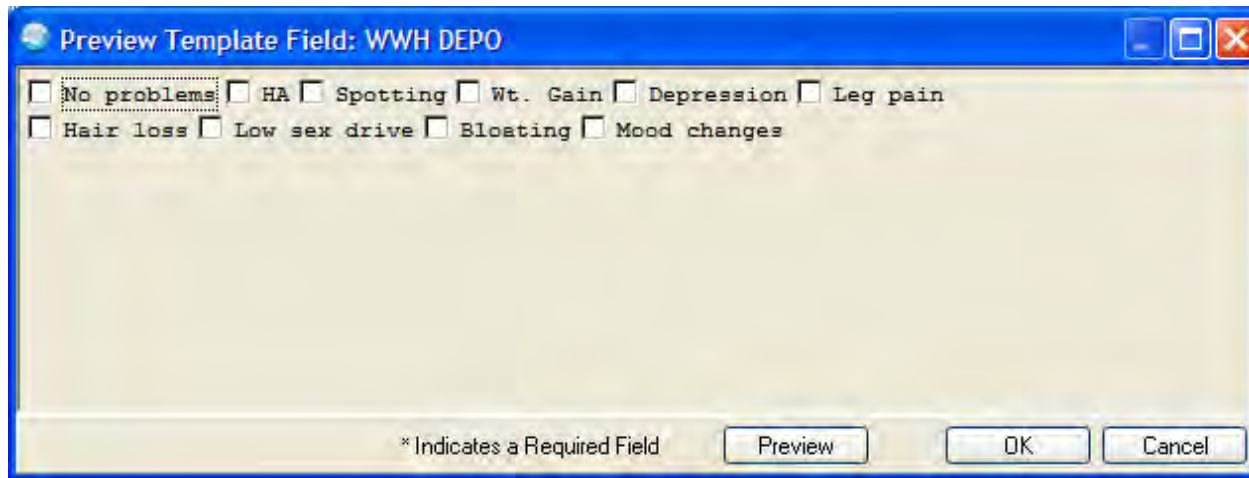
# Check Box

The screenshot shows the 'Template Field Editor' dialog box. The 'Action' bar at the top contains 'Delete', 'Copy', and 'New' buttons. The 'Template Fields' list on the left includes various fields, with 'WwH DEPO' (Check) selected. The right-hand configuration area shows the following details:

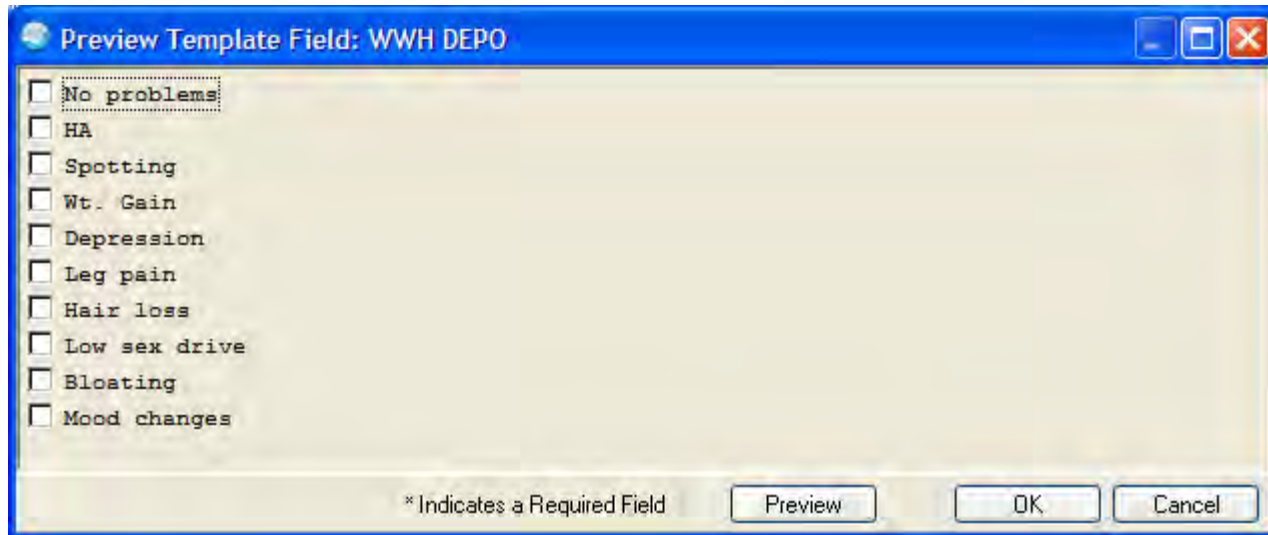
- Name: WwH DEPO
- Type: Check Boxes (dropdown)
- Field Len: [ ] (spin box)
- Text Len: [ ] (spin box)
- Default: [ ] (dropdown)
- Items: Leg pain, Hair loss, Low sex drive, Bloating, Mood changes (list)
- Line: 11
- Col: 1
- LM Text: [ ] (text box)

Below the configuration area are two sections: 'Miscellaneous' and 'Indent'. The 'Miscellaneous' section contains four checkboxes: 'Inactive' (unchecked), 'Separate Lines' (unchecked), 'Required' (unchecked), and 'Exclude From Note' (unchecked). The 'Indent' section contains two spin boxes: 'Indent Field' (set to 0) and 'Indent Text' (set to 0). At the bottom, there is a 'Notes' text area and a row of buttons: 'Preview', 'OK', 'Cancel', and 'Apply'. A checkbox at the bottom left is checked, labeled 'Hide Inactive Fields', with a note '\* Indicates a Required Field'.

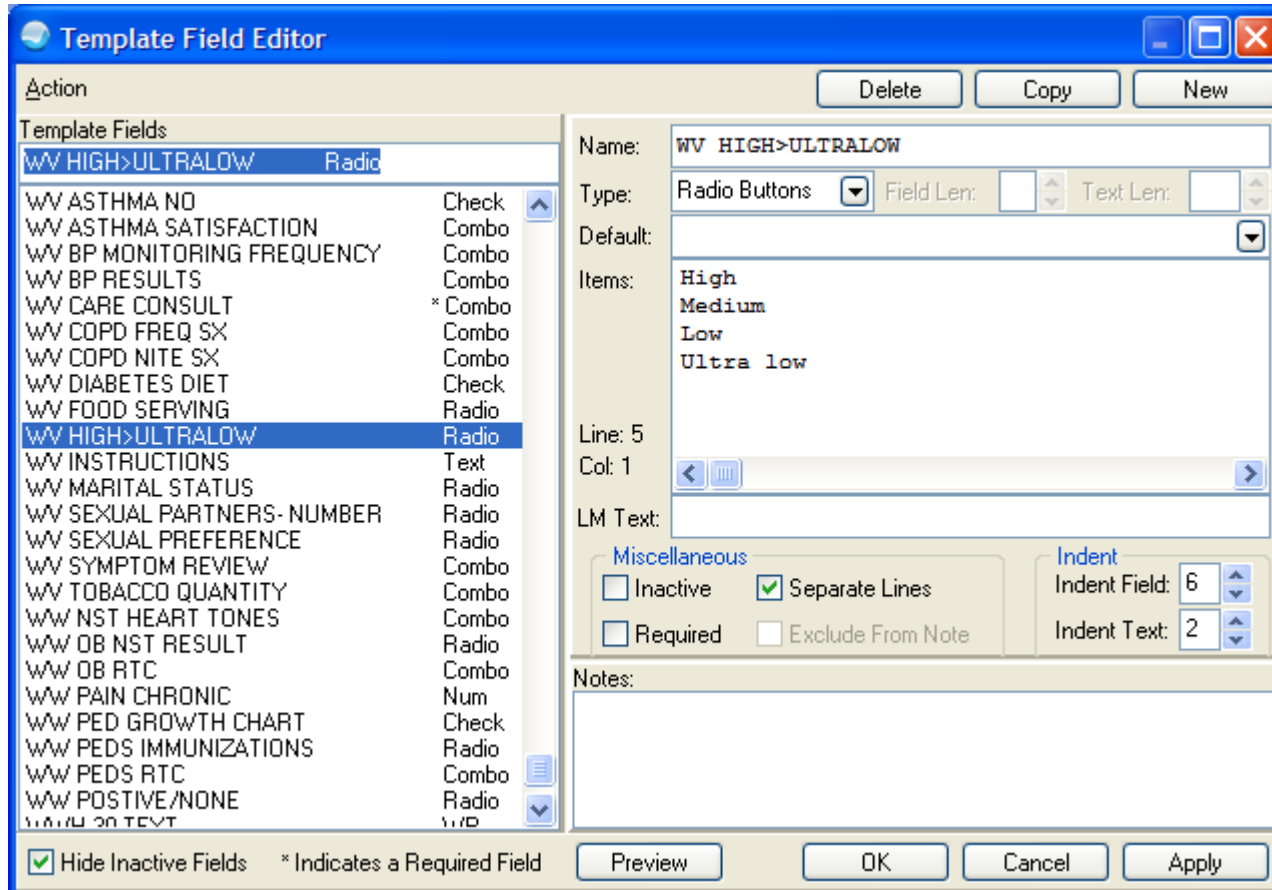
# Check Box Preview



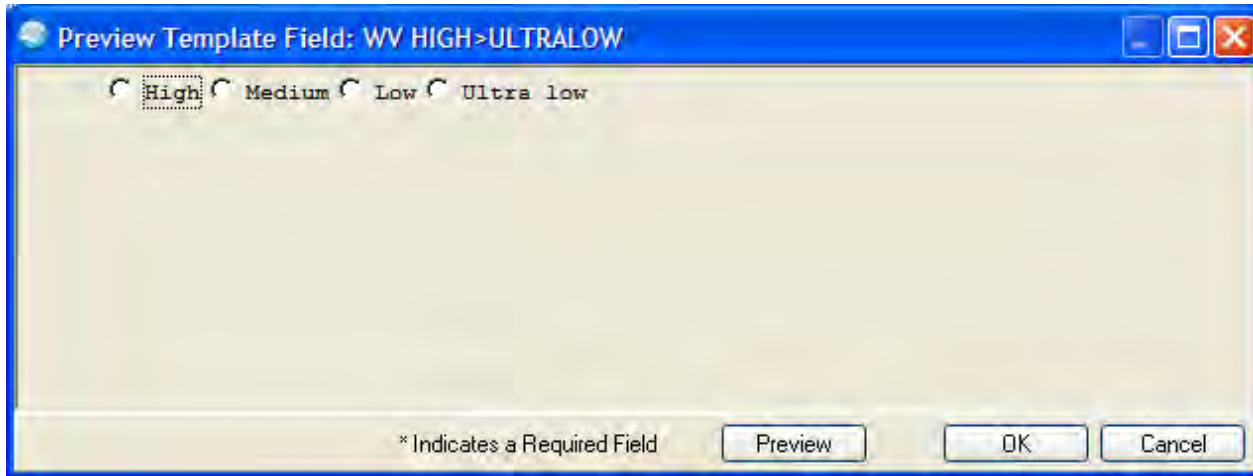
# Check Box Preview (Separate Lines)



# 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

The screenshot shows the 'Template Field Editor' dialog box. The 'Name' field is 'DATE FIELD'. The 'Type' is 'Date'. The 'Date Type' dropdown is open, showing options: 'Date', 'Date & Time', 'Date & Required Time', 'Combo Style', 'Combo Year Only', and 'Combo Year & Month'. The 'Date' option is selected. The 'Default' field is empty. The 'LM Text' field is empty. The 'Miscellaneous' section has 'Inactive' and 'Required' checkboxes, and 'Separate Lines' and 'Exclude From Note' checkboxes. The 'Indent' section has 'Indent Field' and 'Indent Text' spinners, both set to 0. The 'Notes' field is empty. The 'Action' pane on the left lists various template fields, with 'DATE FIELD' selected. The 'Hide Inactive Fields' checkbox is checked. The bottom buttons are 'Preview', 'OK', 'Cancel', and 'Apply'.

Template Field Editor

Action: Delete Copy New

Template Fields

DATE FIELD

DATE FIELD

WSP PN US RESULT Check  
WSP POS/NEG Radio  
WSP POS/NEG/NA Button  
WSP POS/NEG/SUS1 Radio  
WSP POSITIVE ONLY Button  
WSP POSITIVE/NEGATIVE Combo  
WSP POSITIVE/NEGATIVE1 Button  
WSP PROVIDER BUTTON Radio  
WSP PROVIDERS Combo  
WSP PUBIC HAIR DEVELOPMENT Radio  
WSP PUBIC HAIR DEVELOPMENT MA1 Radio  
WSP PUBIC HAIR DEVELOPMENT MALE  
WSP QUANTITY MAX 10 \* Num  
WSP READINESS TO LEARN Check  
WSP REALTIONSHIP Check  
WSP REC/DONE/REFUSED Button  
WSP REFILL IRREGULARITIES Combo  
WSP REFUSALS Check  
WSP REFUSALS1 Check  
WSP RELATIVE Check  
WSP RELATIVE1 Check  
WSP DM YES/NO RADIO Radio

Name: DATE FIELD

Type: Date Field Len: Text Len:

Default: Date Type: Date

LM Text:

Miscellaneous: Inactive Separate Lines Required Exclude From Note

Indent: Indent Field: 0 Indent Text: 0

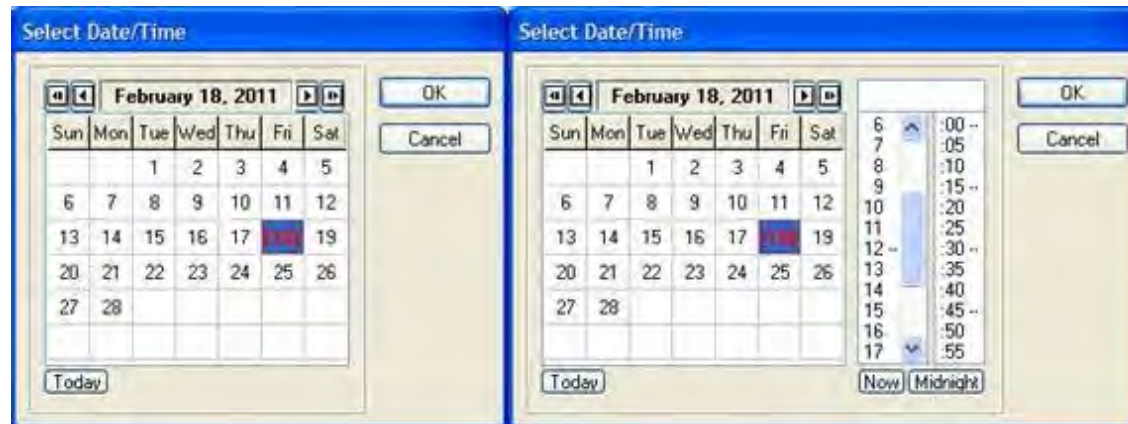
Notes:

Hide Inactive Fields \* Indicates a Required Field

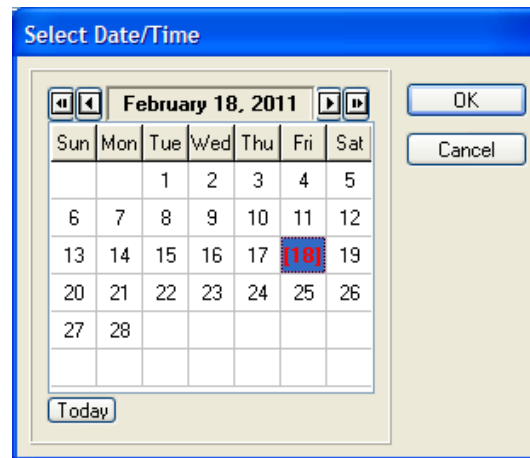
Preview OK Cancel Apply

# Date Preview

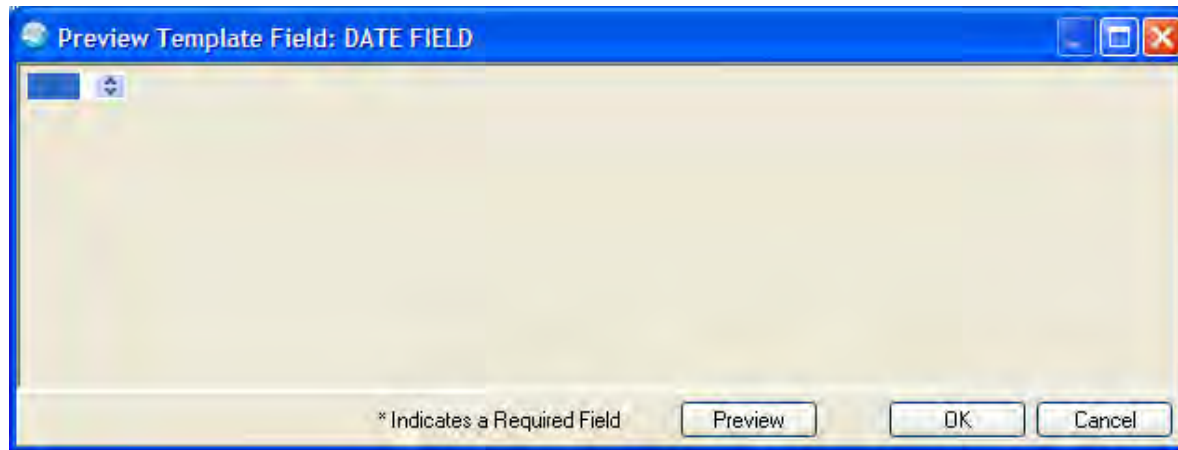
## Simple Date or Date and Time



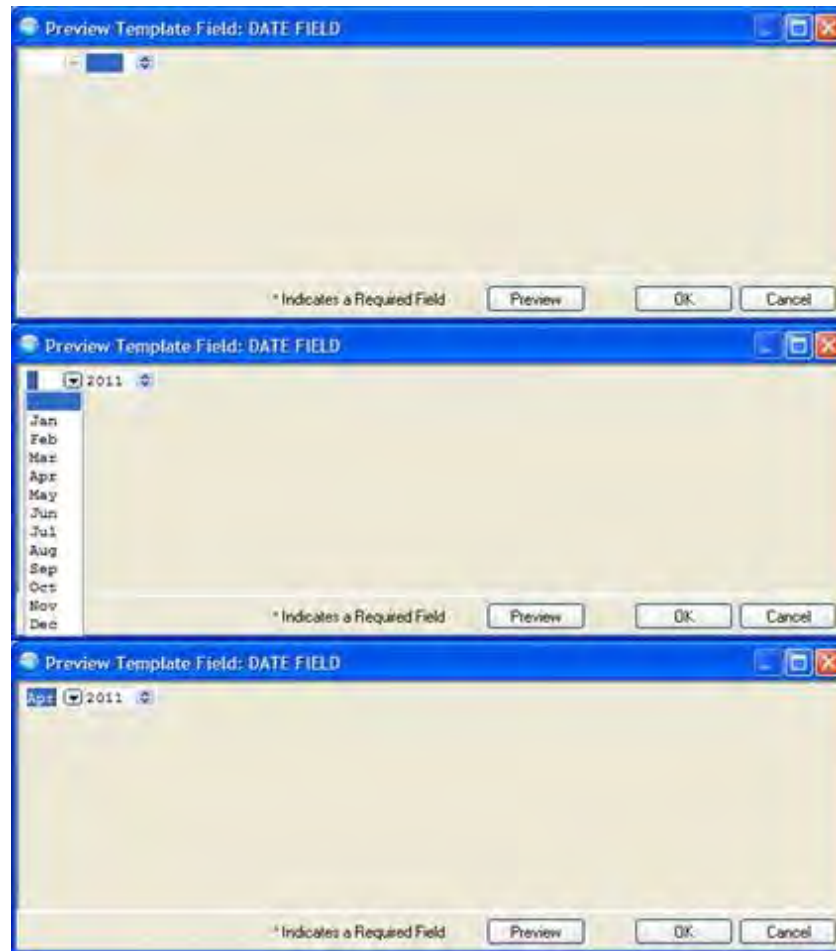
# Date Combo Style Preview



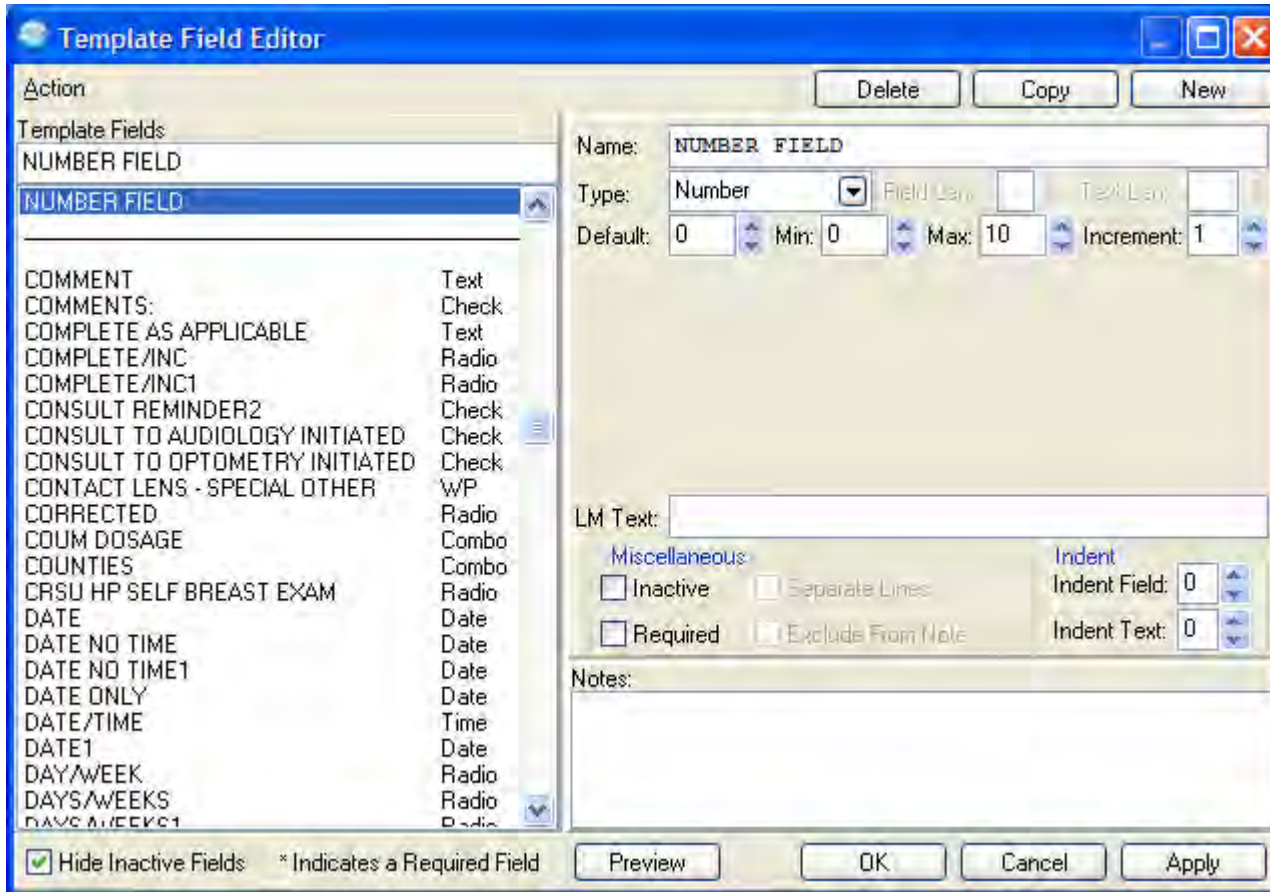
# Date Preview Combo Year Only



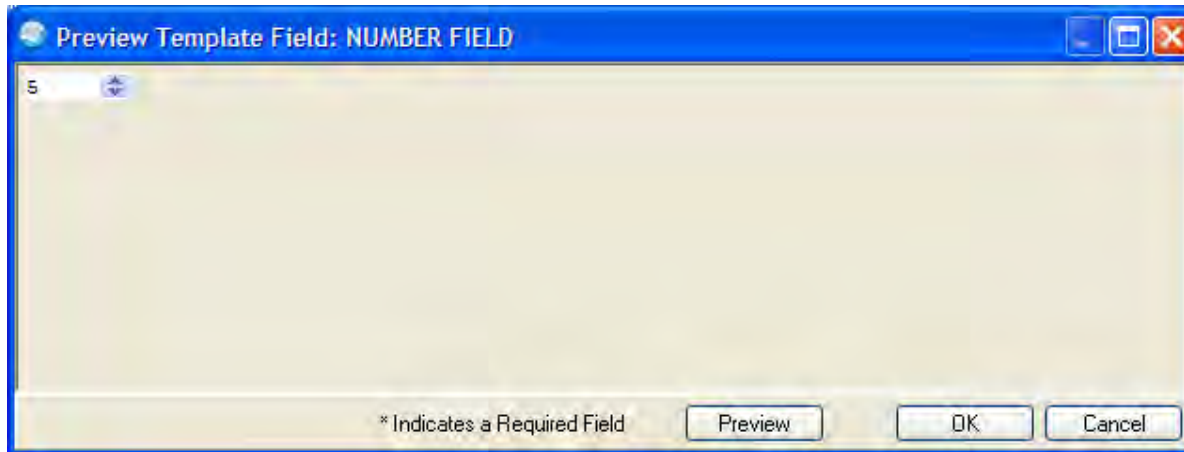
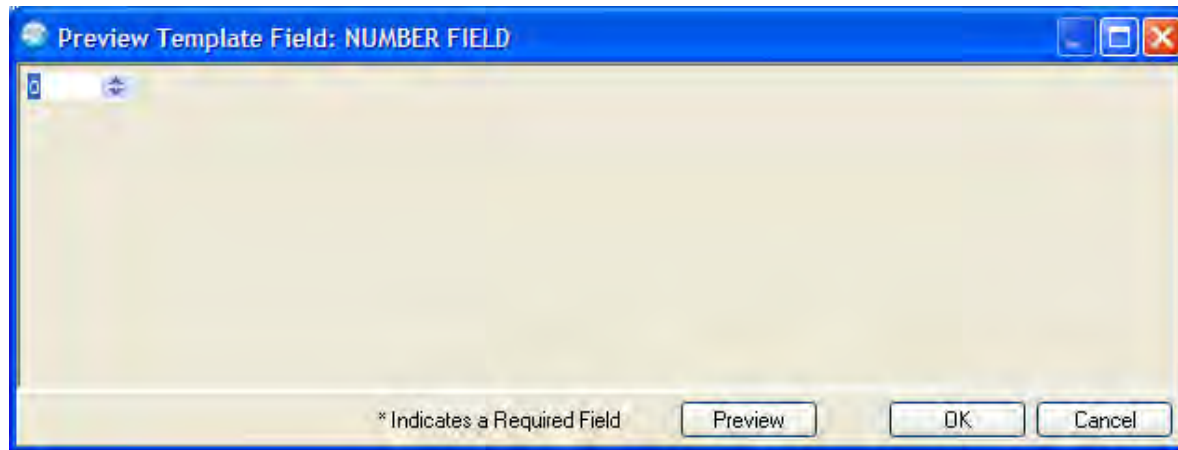
# Date Preview Combo Year and Month



# Number



# Number Preview

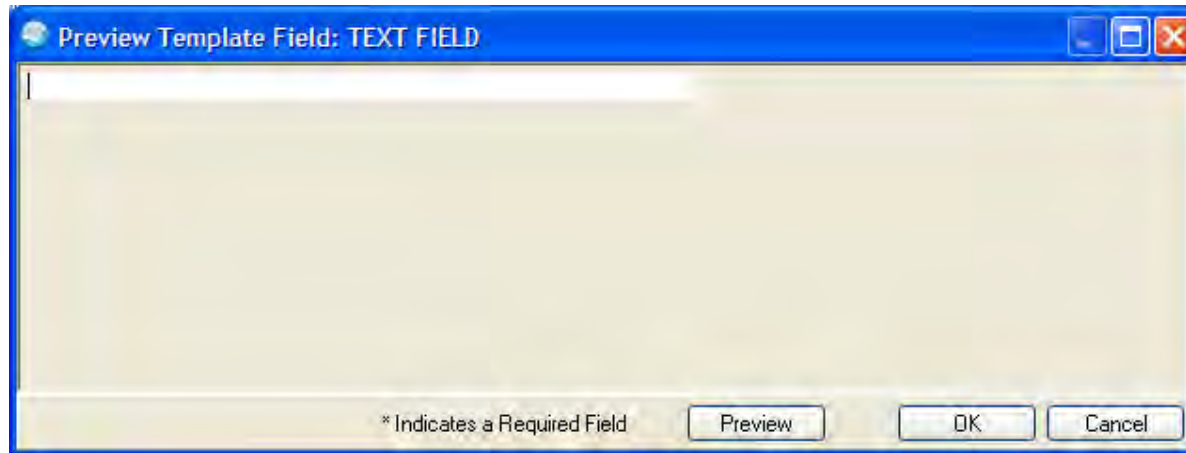
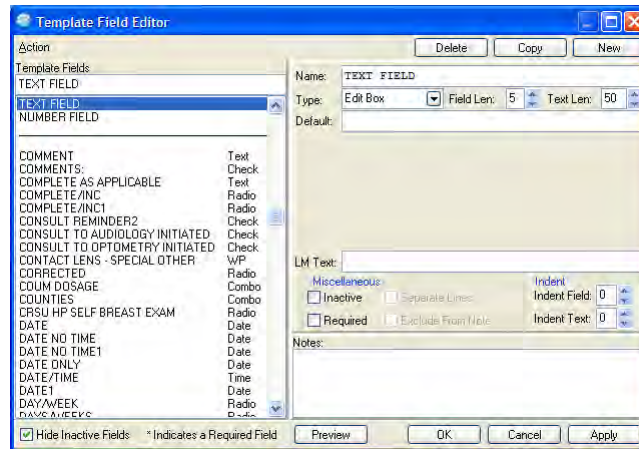


# Word Processing and Edit Box Fields

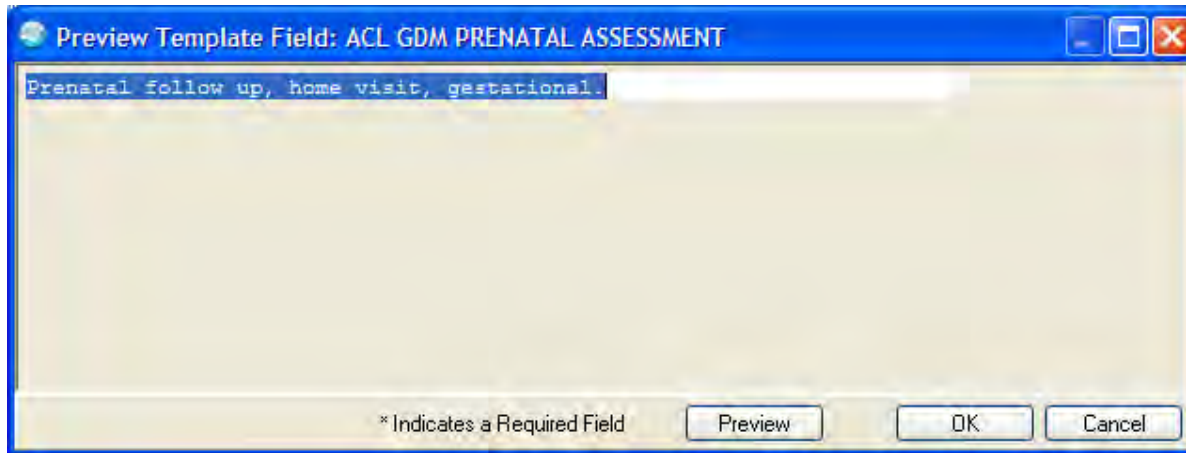
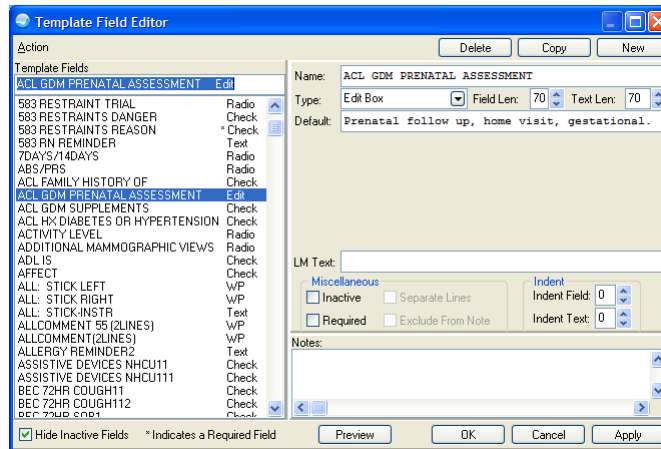
- Edit Box fields give a user an input area of a fixed length (e.g., 50 characters).
- Word Processing fields allow unlimited input of text.
- The width, height and indent of the Word Processing box is customizable.
- Edit Box and Word Processing fields may be blank or may have default text inside.
-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



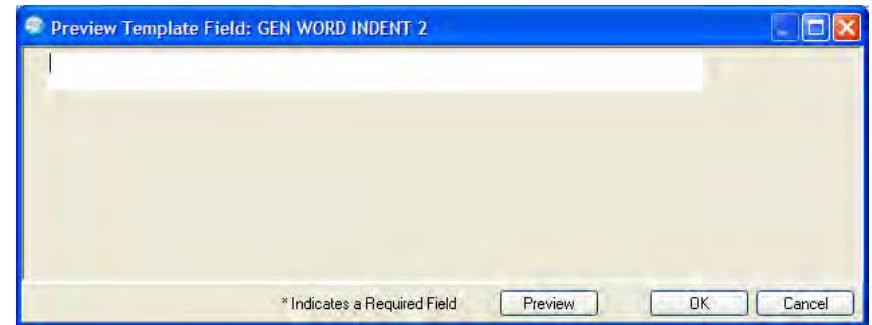
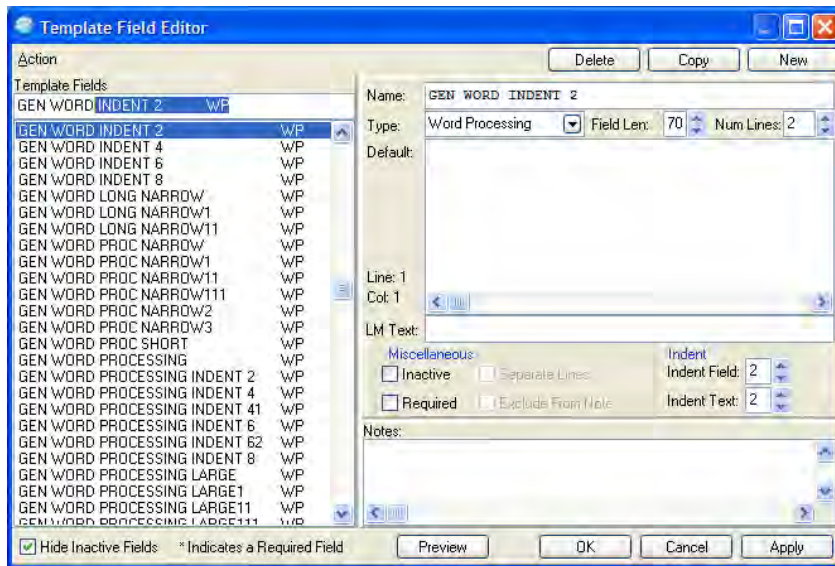
# Edit Box Field Blank Field for Type In



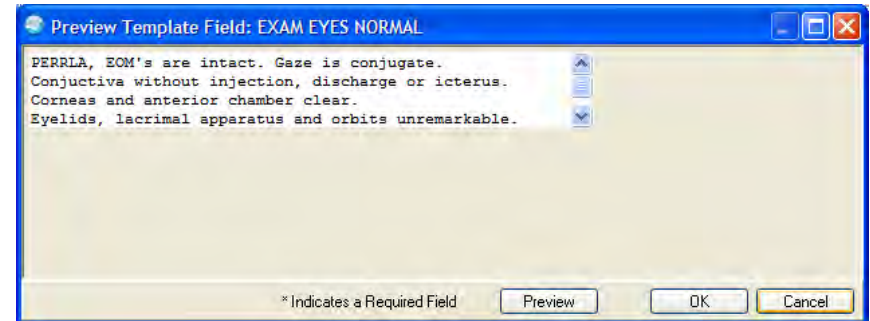
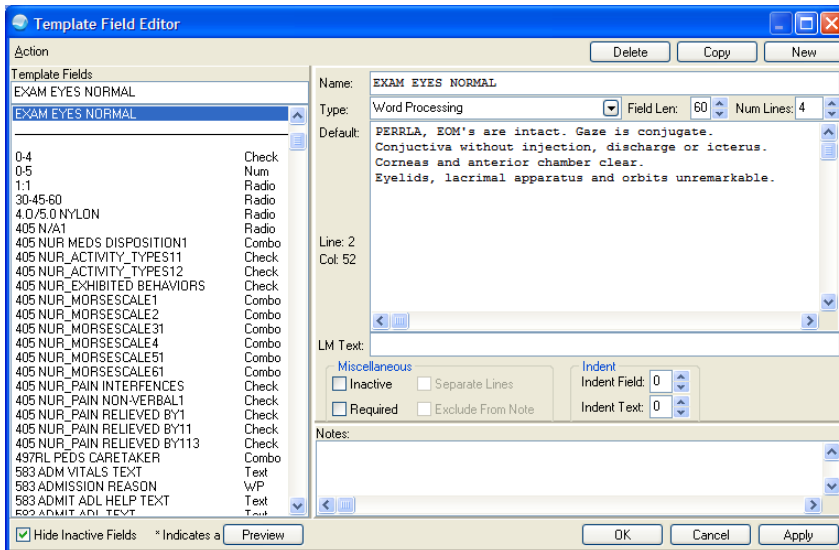
# Edit Box Field With Default Text



# Word Processing Blank Field for Type In



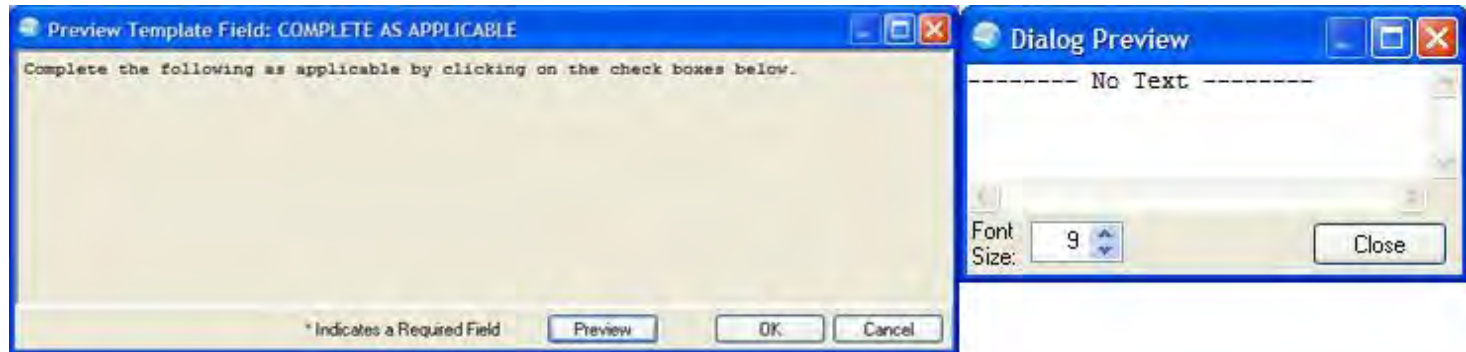
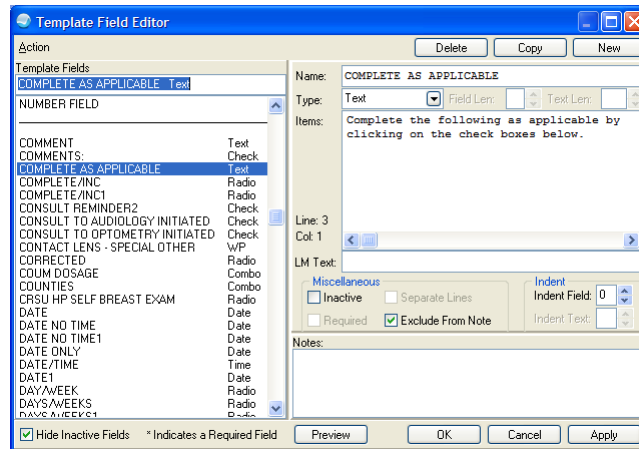
# Word Processing With Default Text



# 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



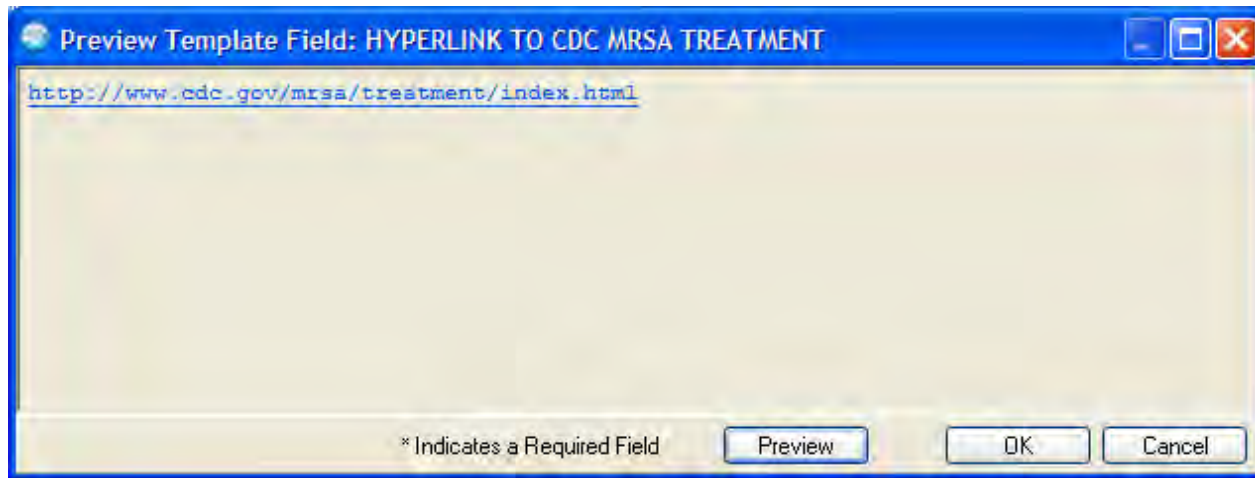
# Hyperlink

The screenshot shows the 'Template Field Editor' window. On the left, a list of 'Template Fields' is shown, with 'HYPERLINK TO CDC MRSA TREATMENT' selected. The right side of the window contains configuration options for the selected field:

- Name:** HYPERLINK TO CDC MRSA TREATMENT
- Type:** Hyperlink (selected from a dropdown)
- Field Len:** [ ]
- Text Len:** [ ]
- Default:** [ ]
- Address:** <http://www.cdc.gov/mrsa/treatment/index.html>
- LM Text:** [ ]
- Miscellaneous:**
  - Inactive
  - Separate Lines
  - Required
  - Exclude From Note
- Indent:**
  - Indent Field: 0
  - Indent Text: 0
- Notes:** [ ]

At the bottom, there are checkboxes for 'Hide Inactive Fields' (checked) and '\* Indicates a Preview', along with 'OK', 'Cancel', and 'Apply' buttons.

# 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.

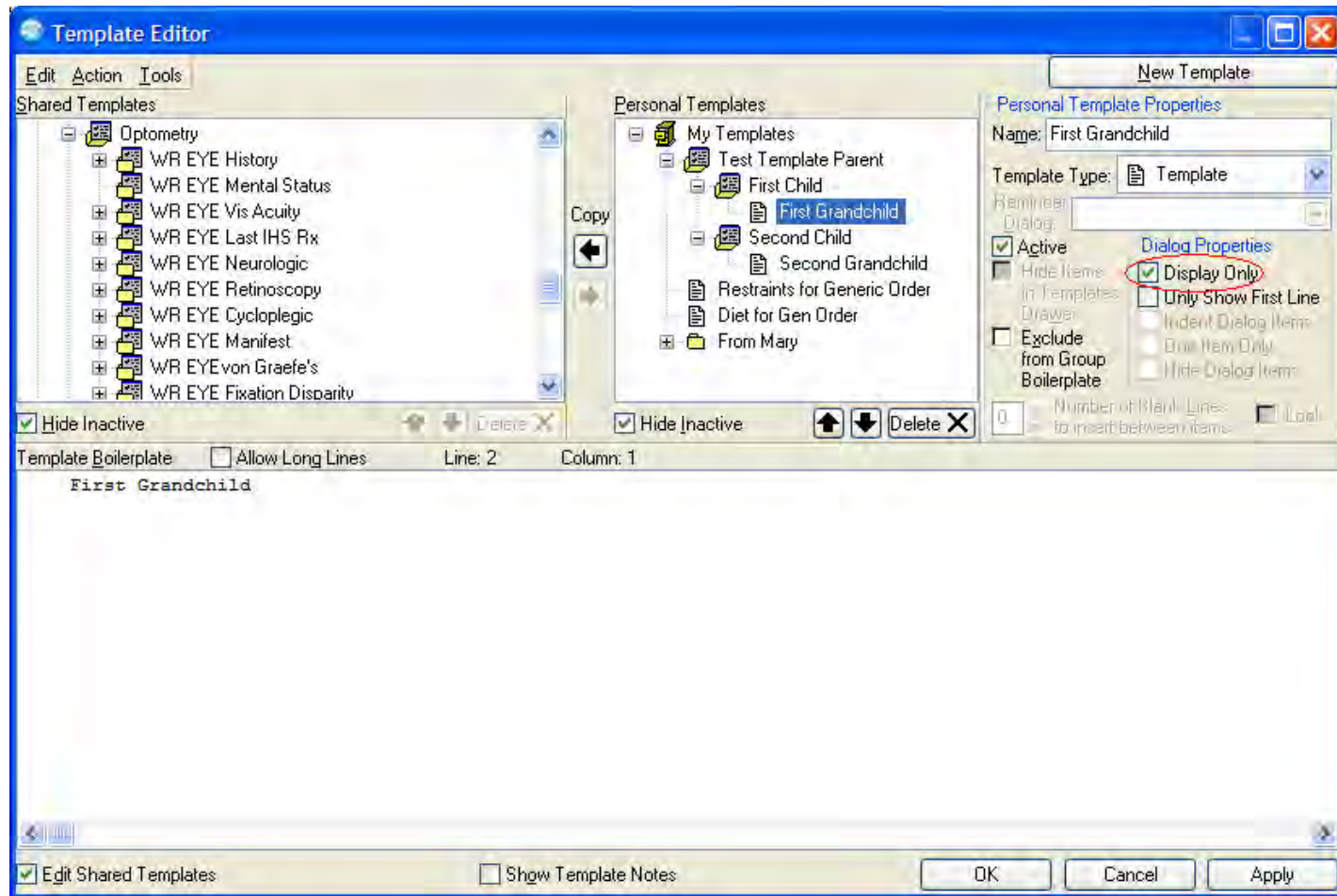
# Common Properties of Templates

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

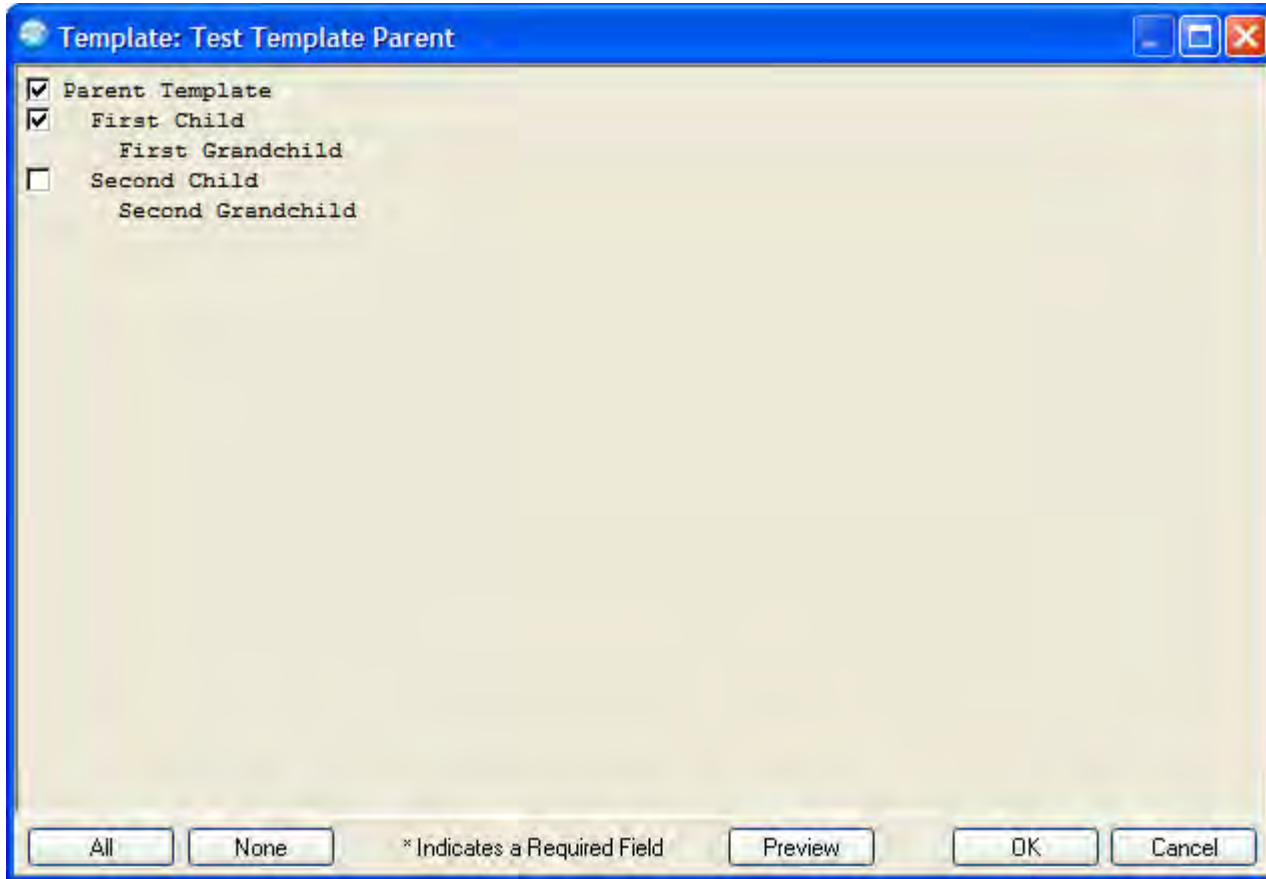
# Display Only

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

# Display Only

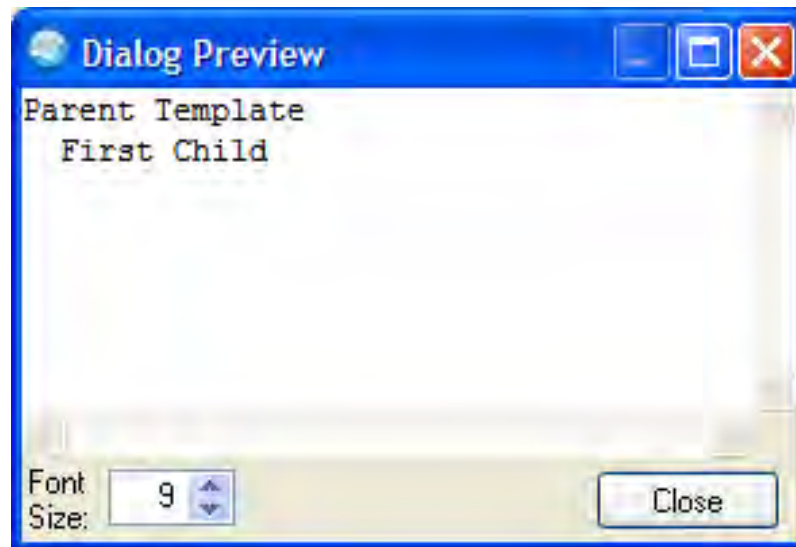


# Display Only

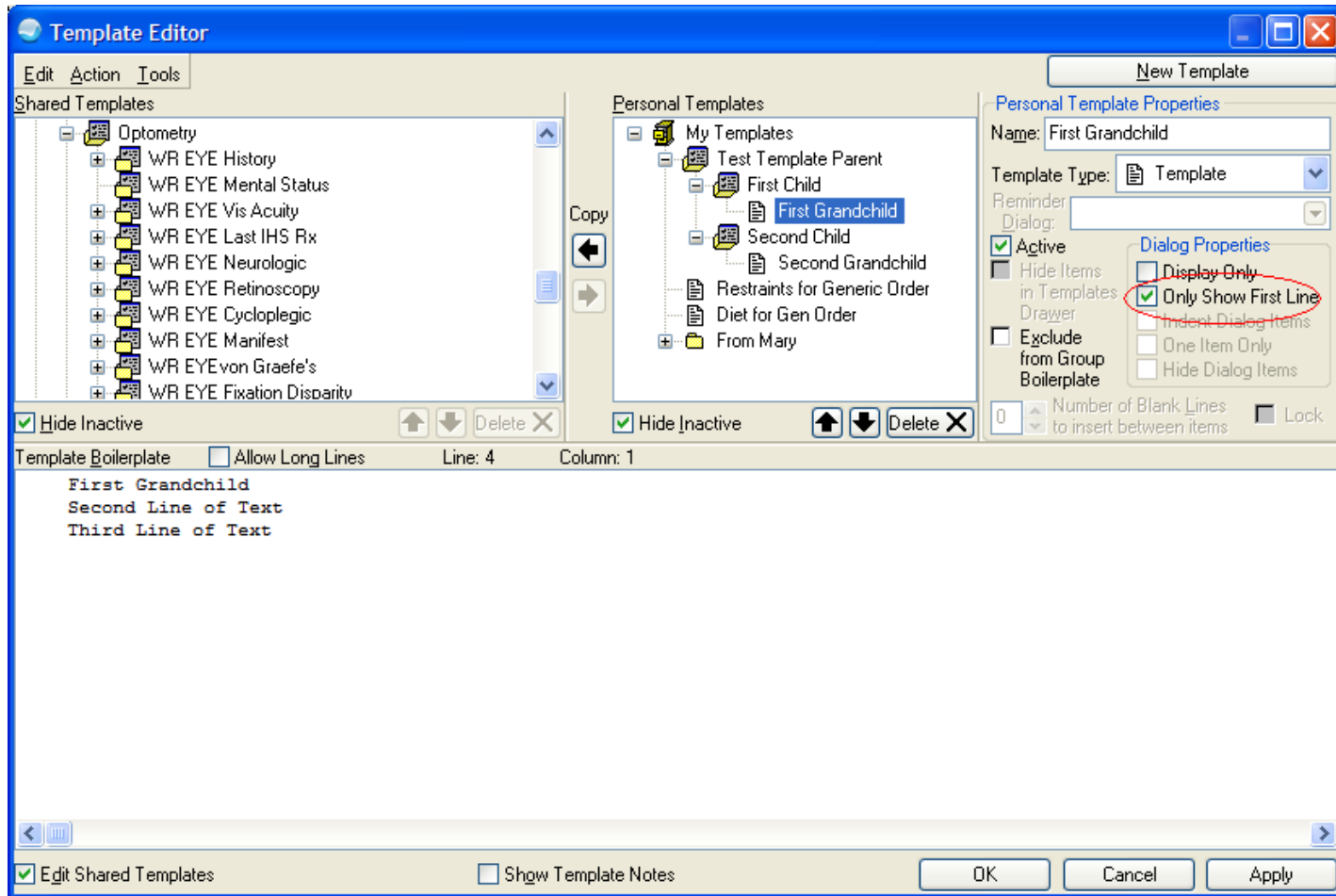


# Display Only

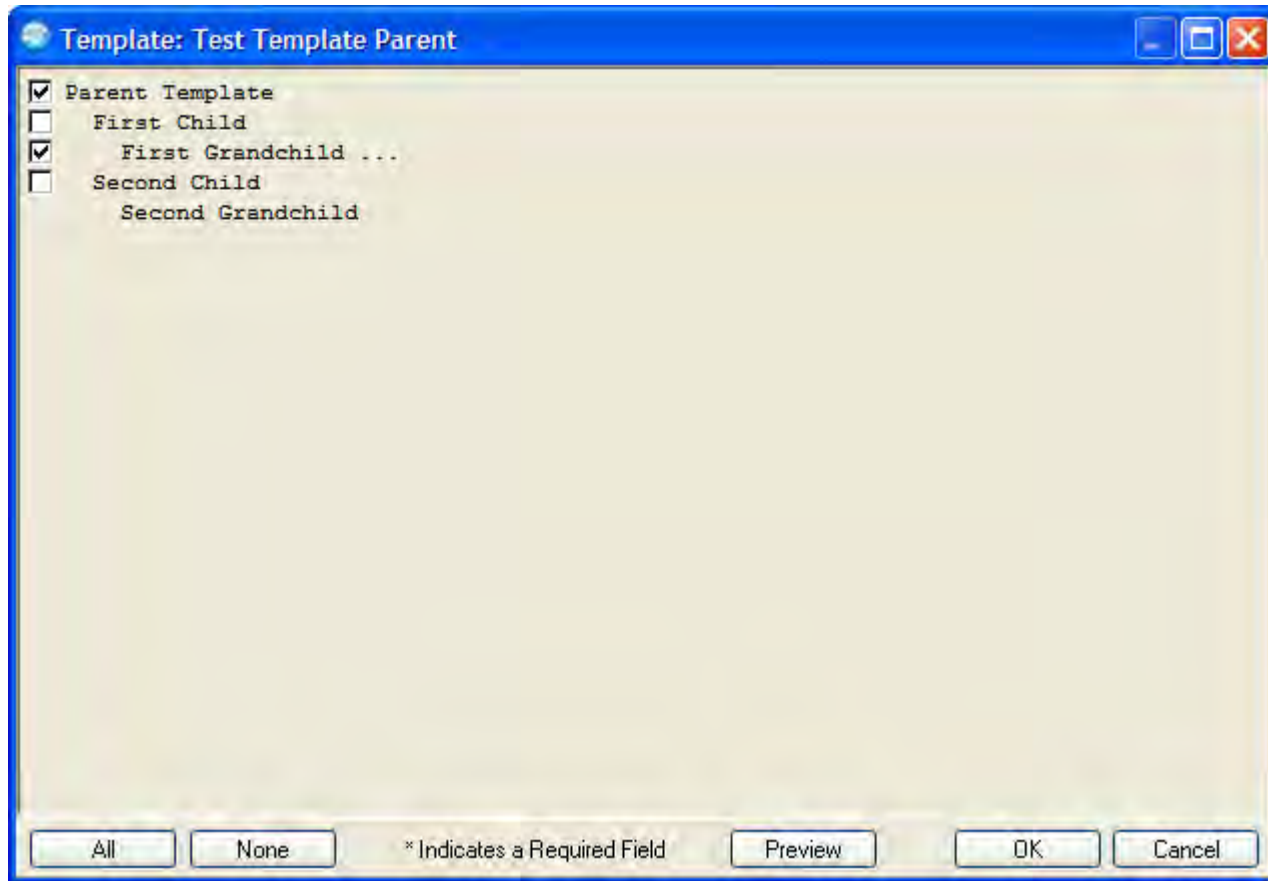
- First grandchild is not part of output.



# Only Show First Line

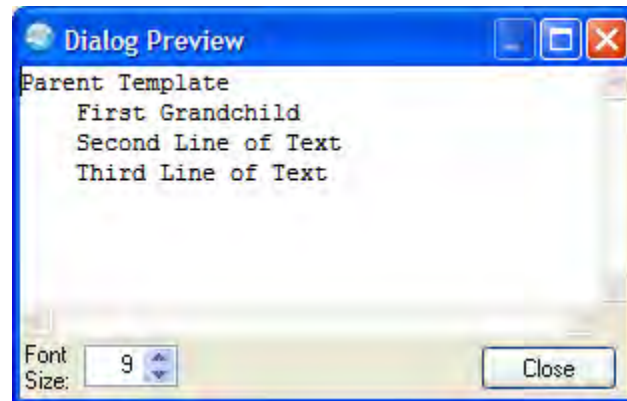


# Only Show First Line

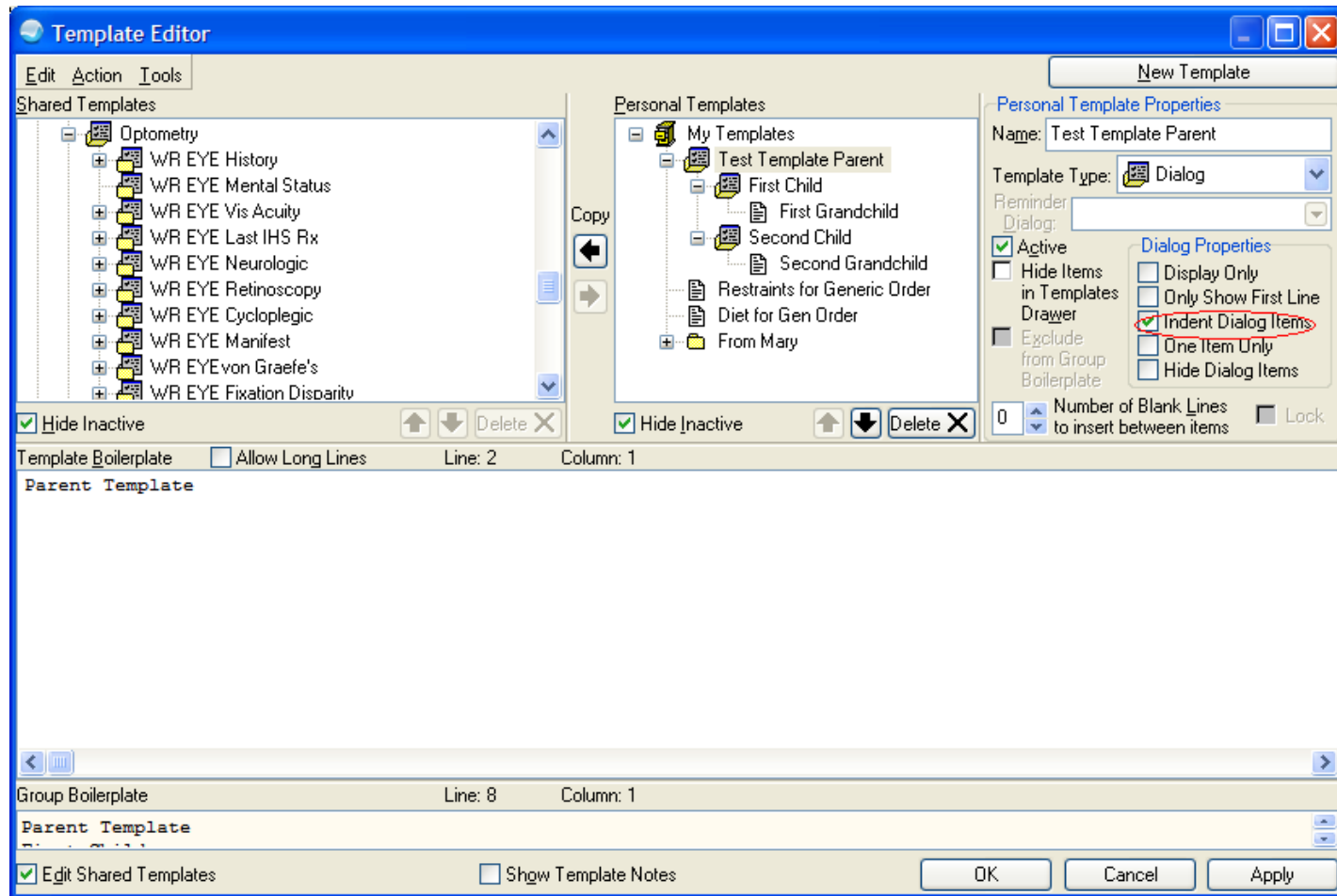




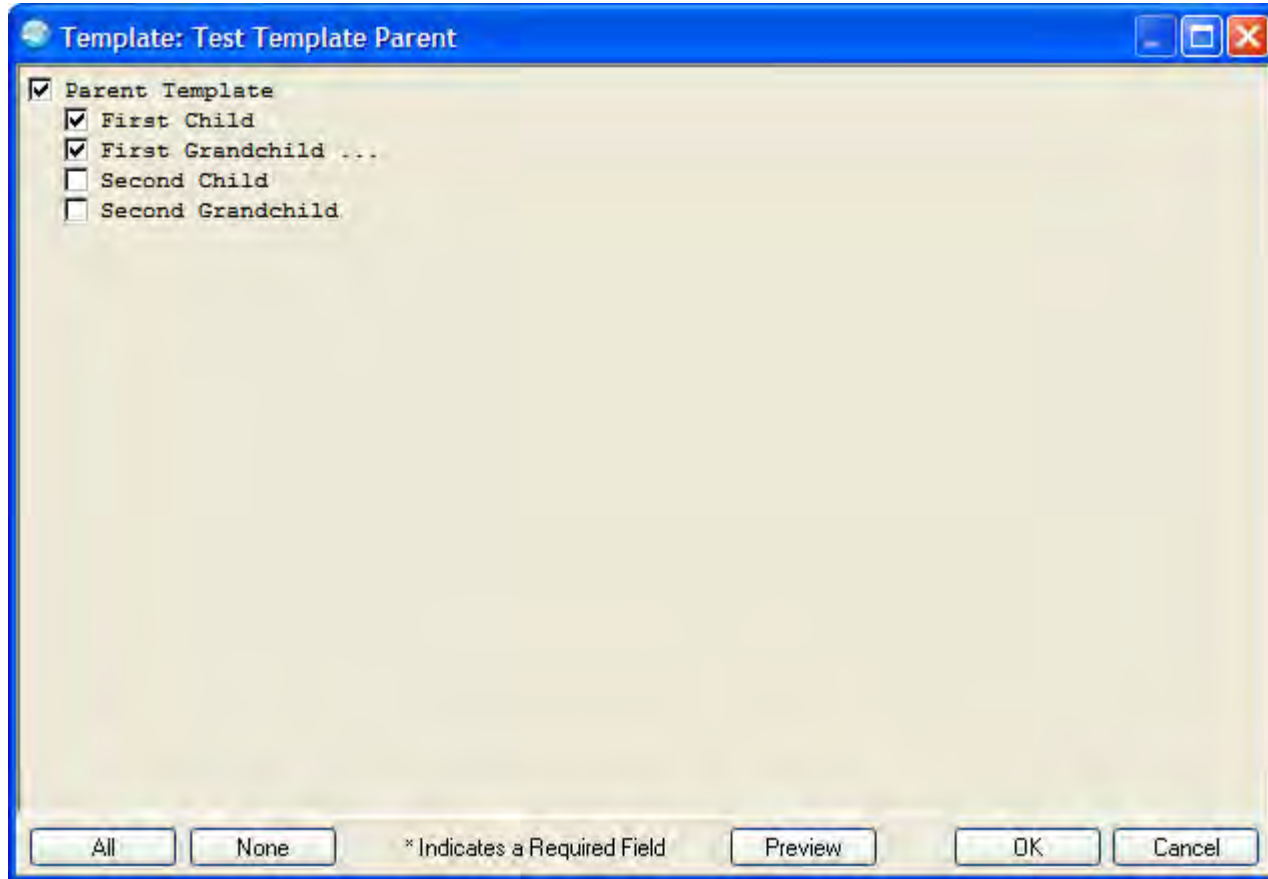
# Only Show First Line



# Indent Dialog Items

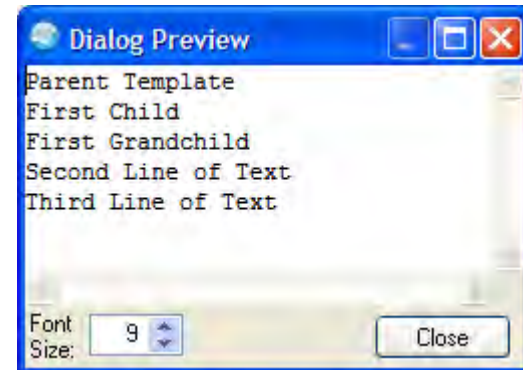


# Indent Dialog Items



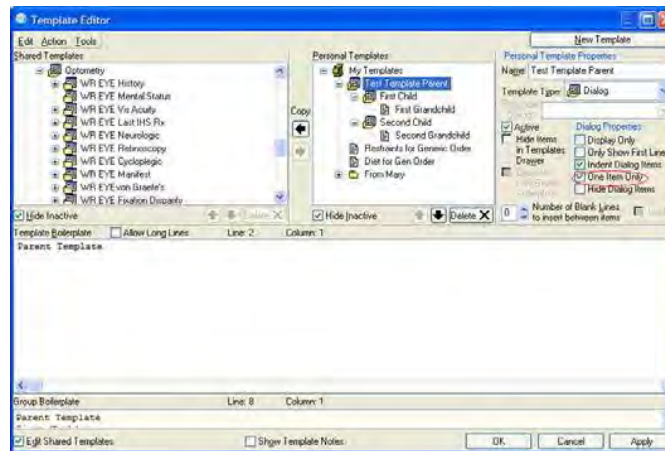
# Indent Dialog Items

- 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

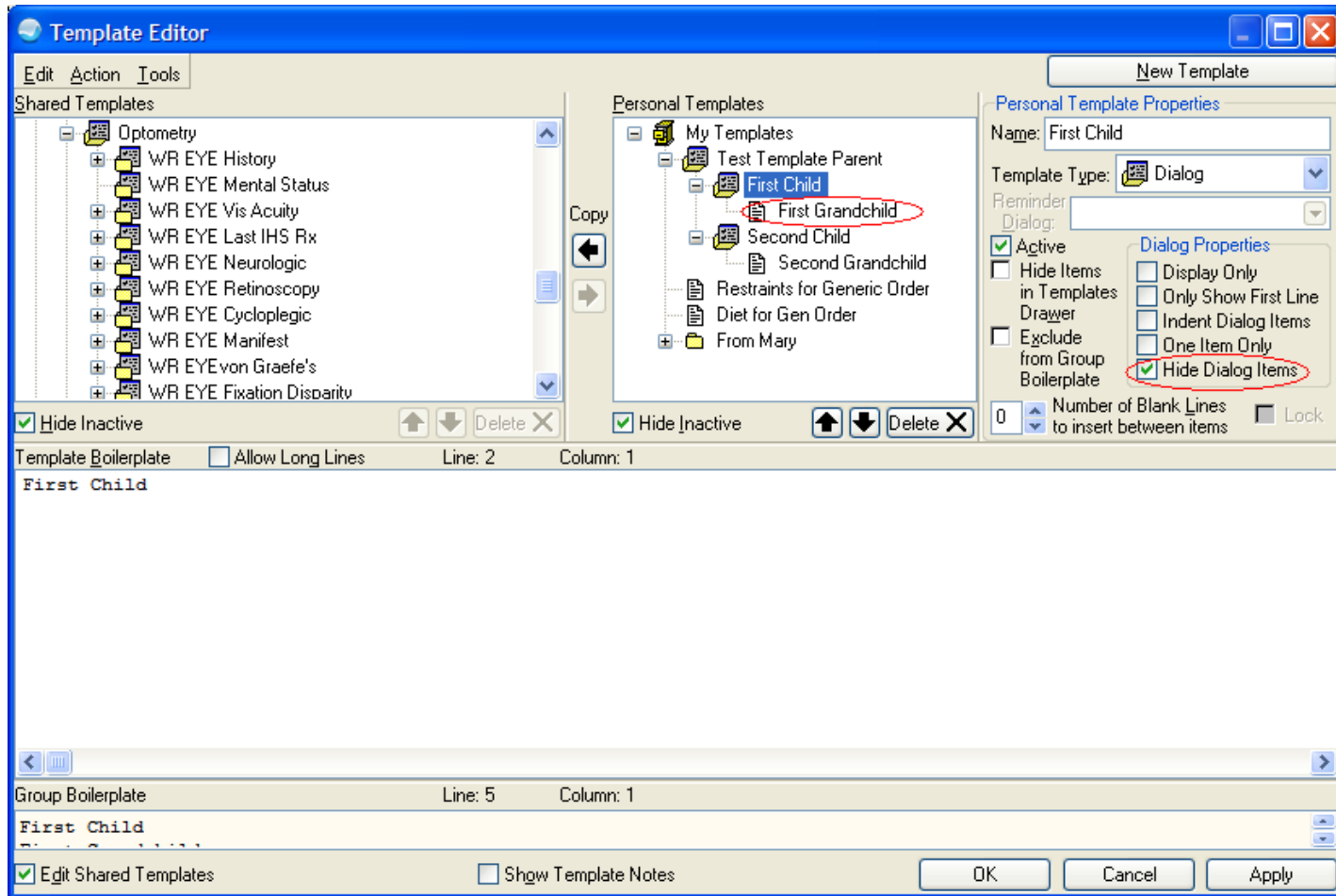
- This behaves the same as Radio Button, but works with dialogs instead of fields.



# One Item Only



# Hide Dialog Items

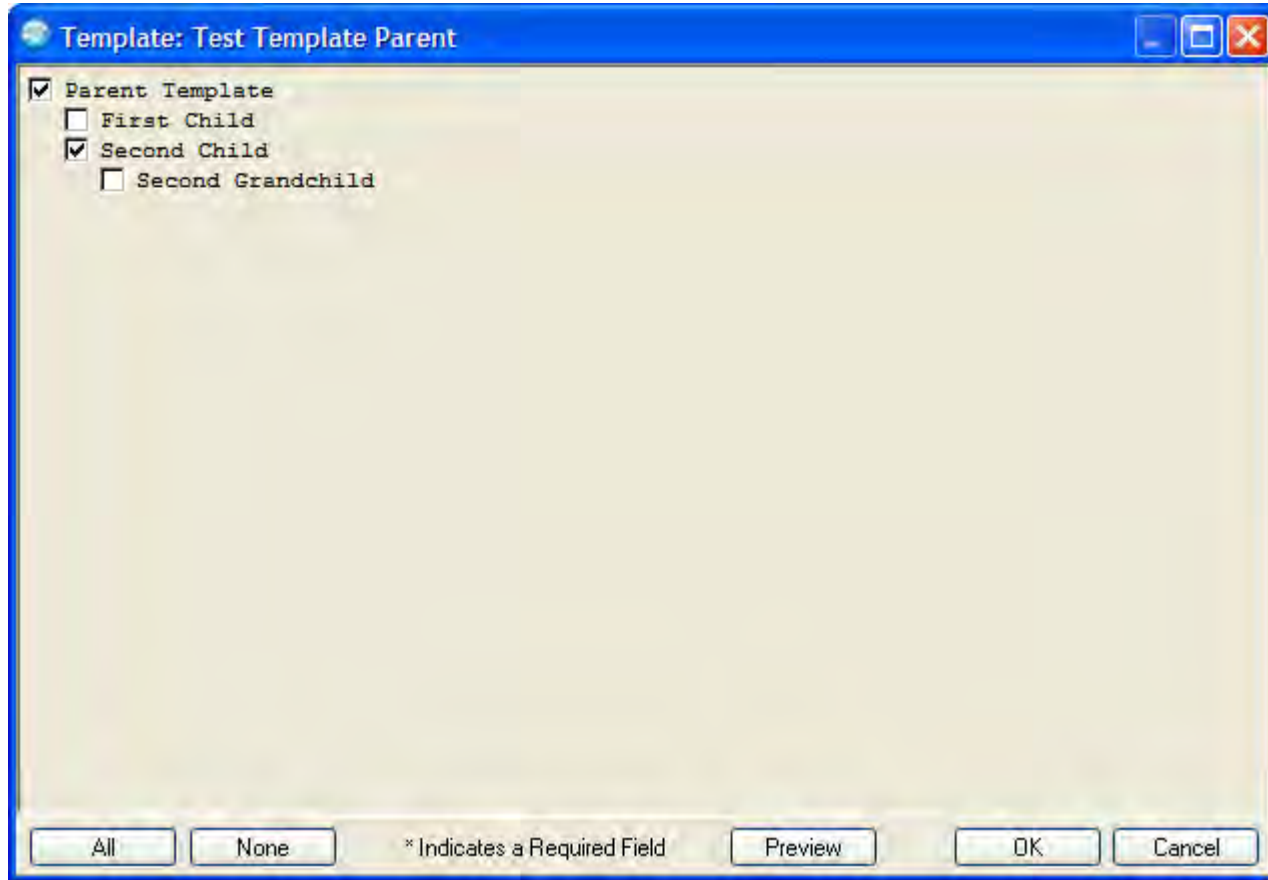


# Hide Dialog Items



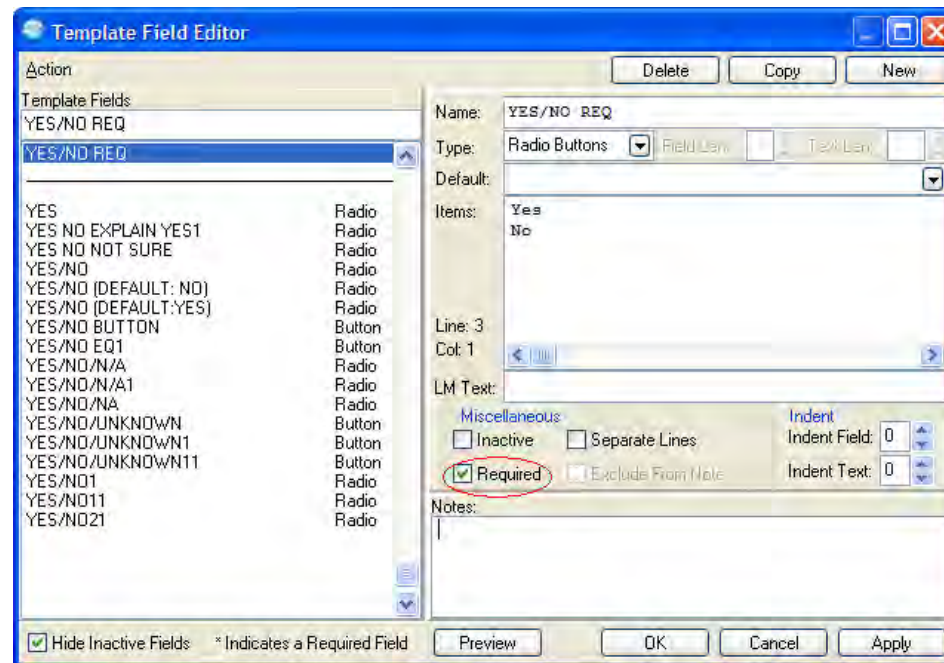


# Hide Dialog Item



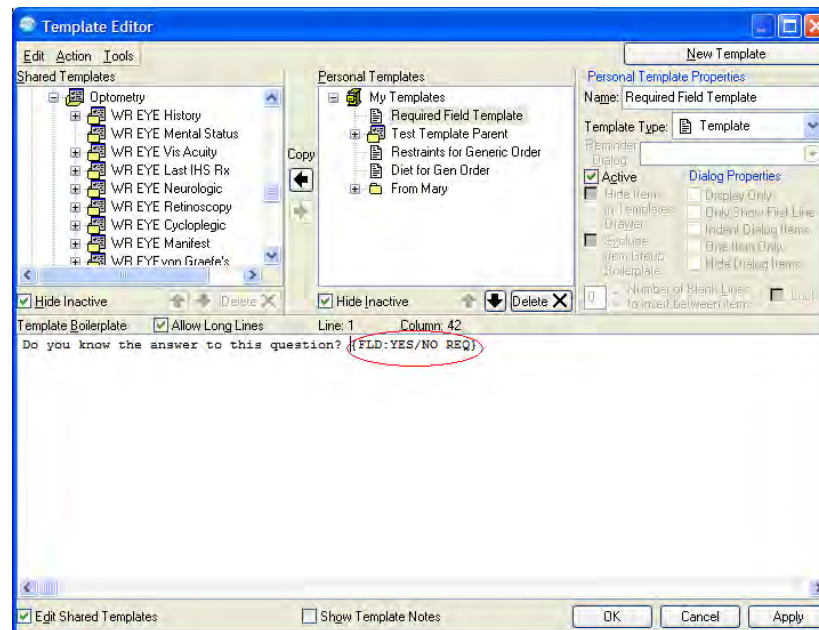
# Required Field

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



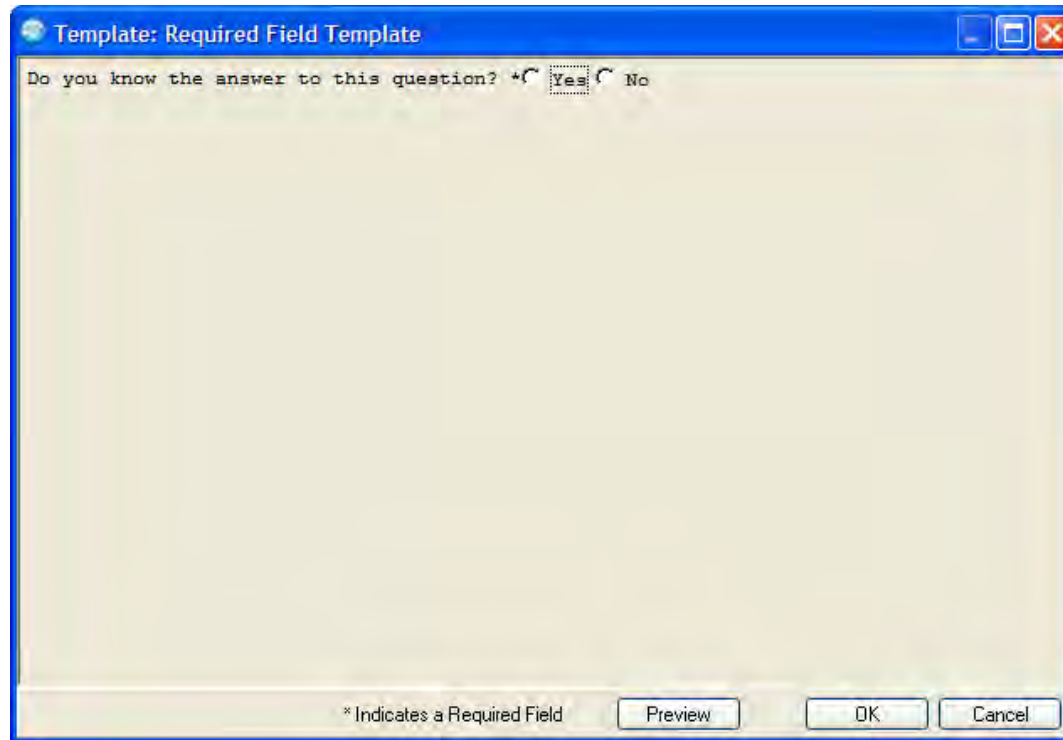
# Required Field

## 2. Place the field in the template.



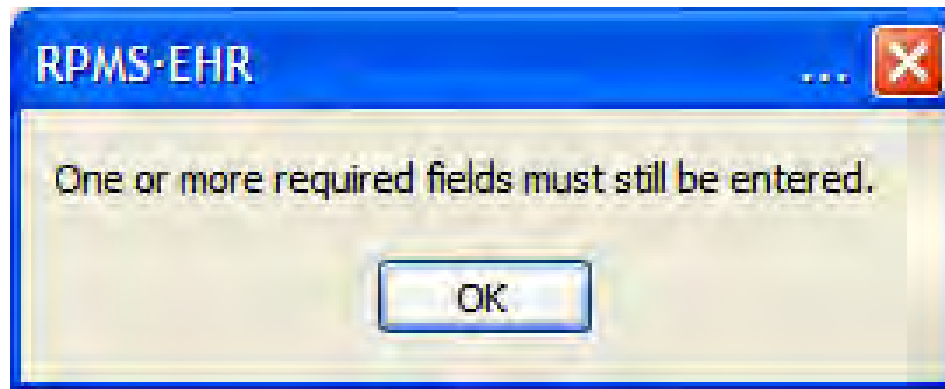
# Required Field

3. Note the asterisk (\*).



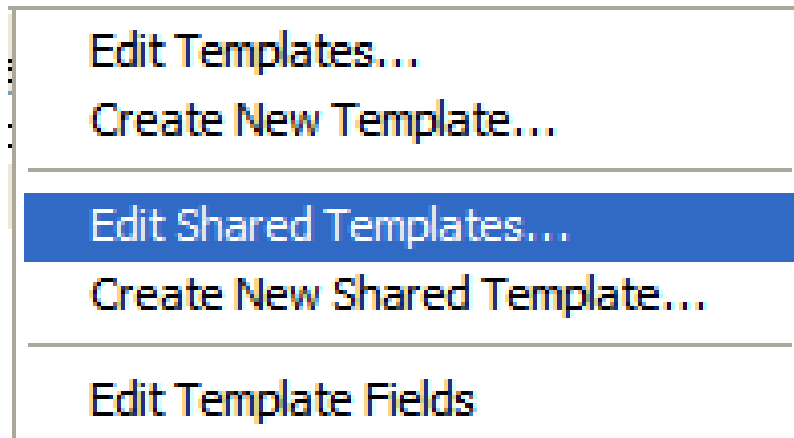
# Required Field

- If the Required Field is not filled in:



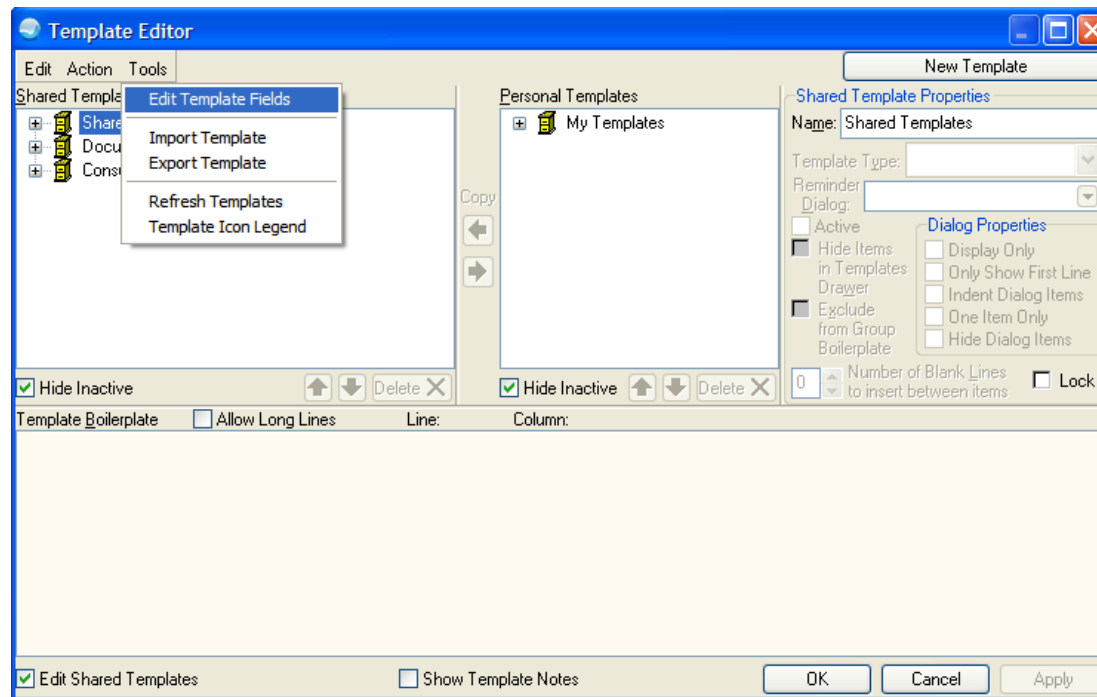
# Creating a New Template Field

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



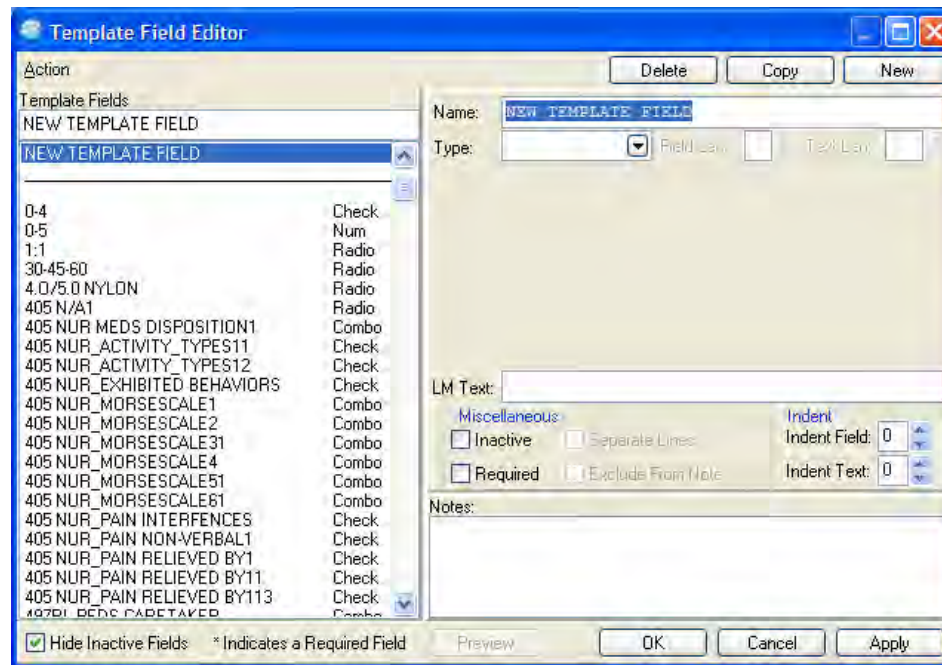
# Creating a New Template Field

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



# Creating a New Template Field

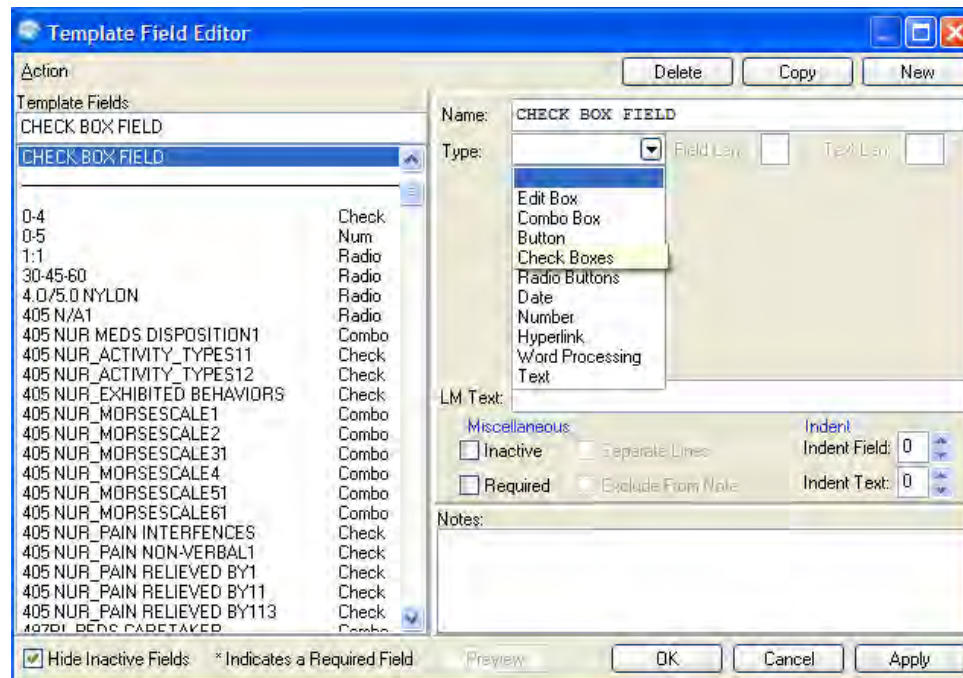
3. In the **Template Field Editor** select **New Template Field**.





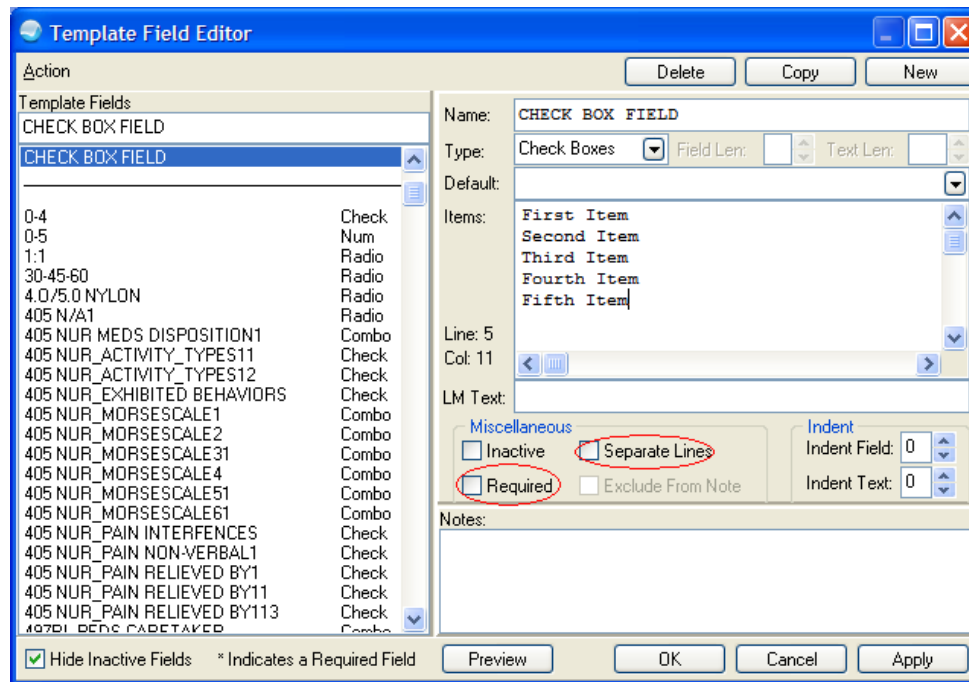
# Creating a New Template Field

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



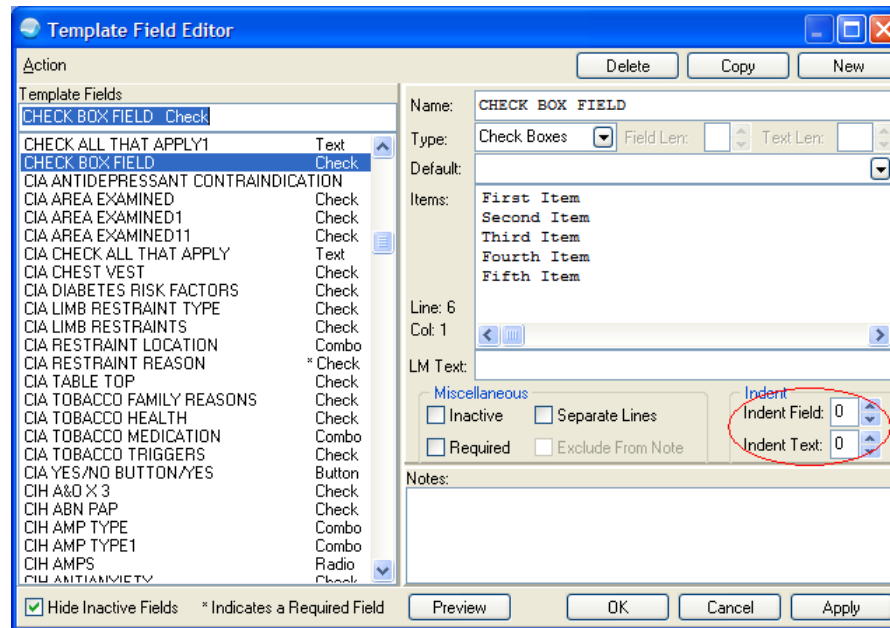
# Creating a New Template Field

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

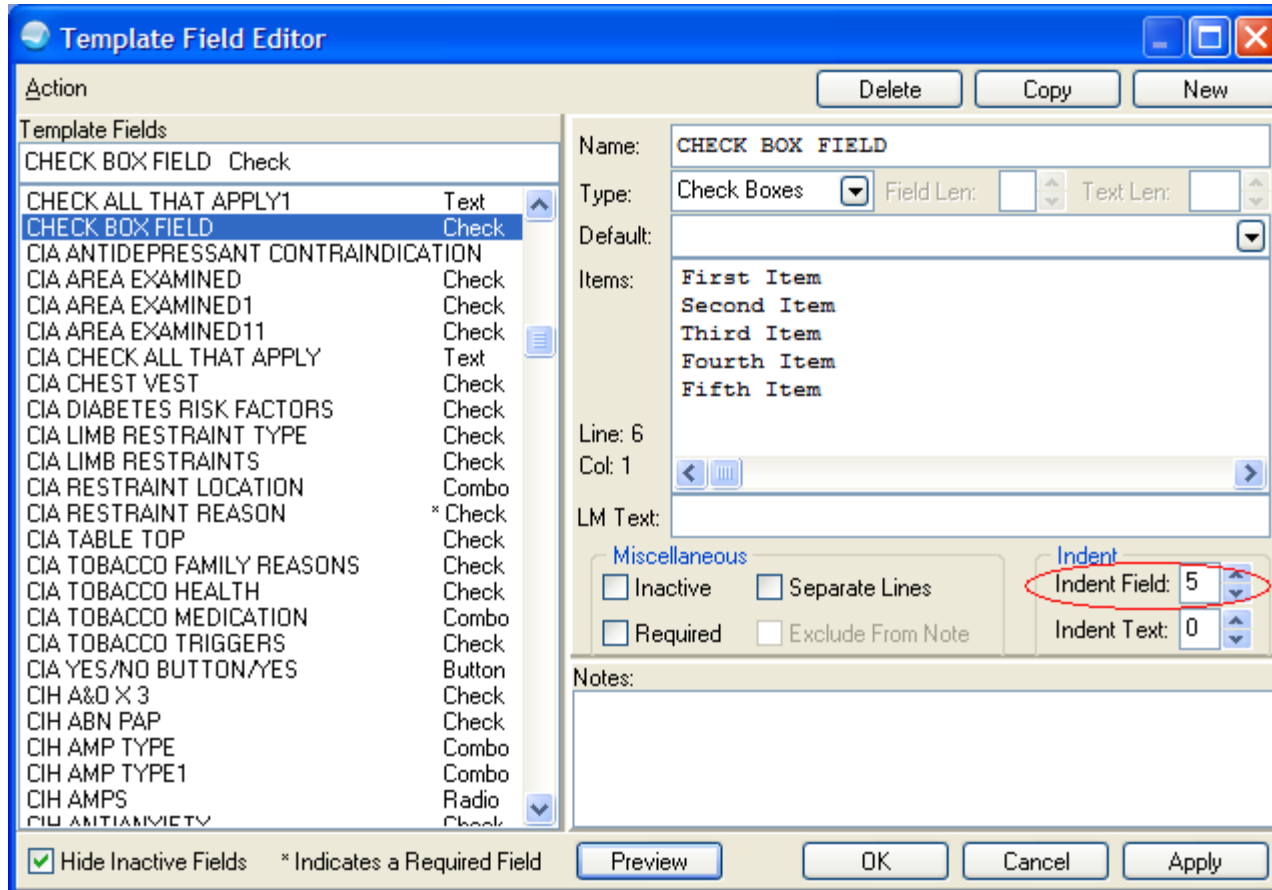


# Indenting

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



# Indent Field

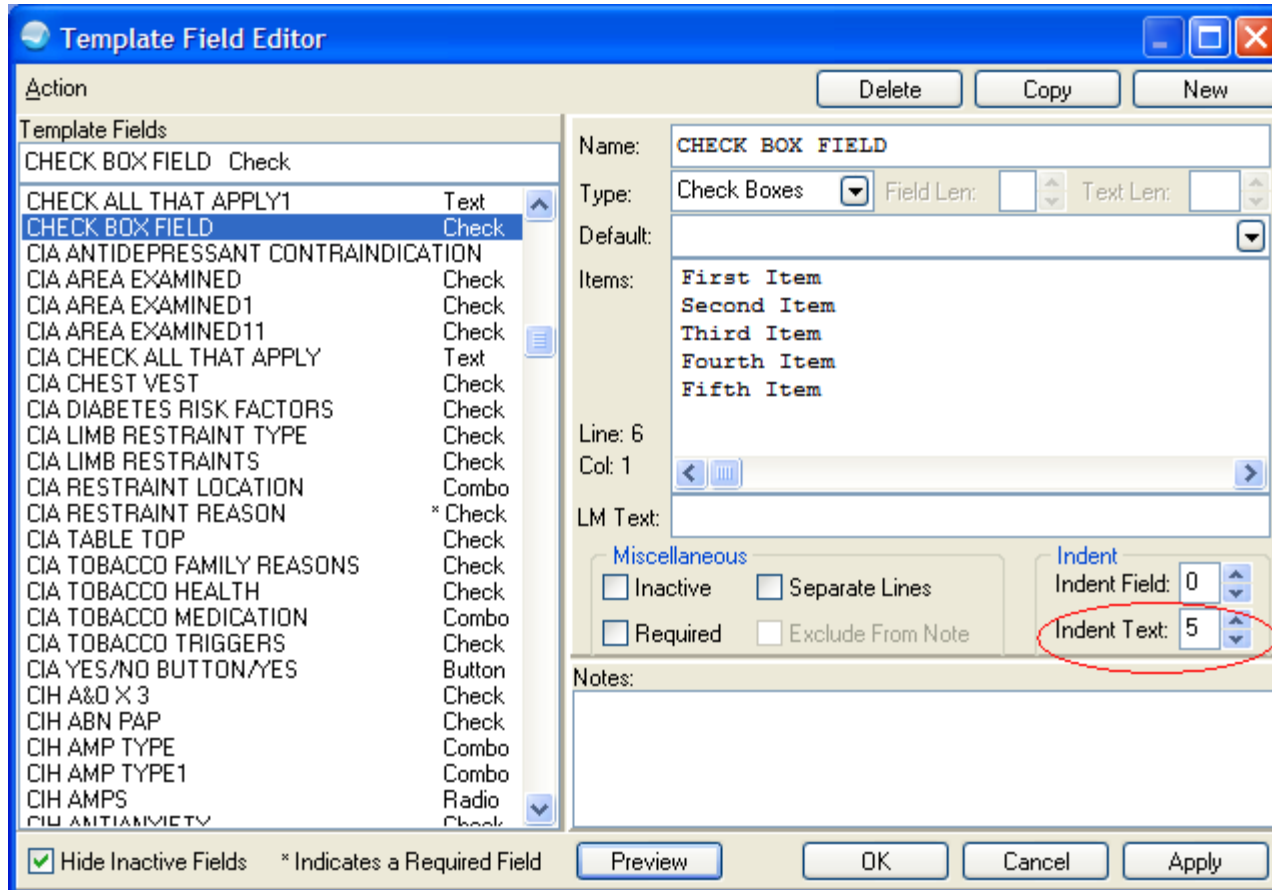


# Indent Field

- 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.



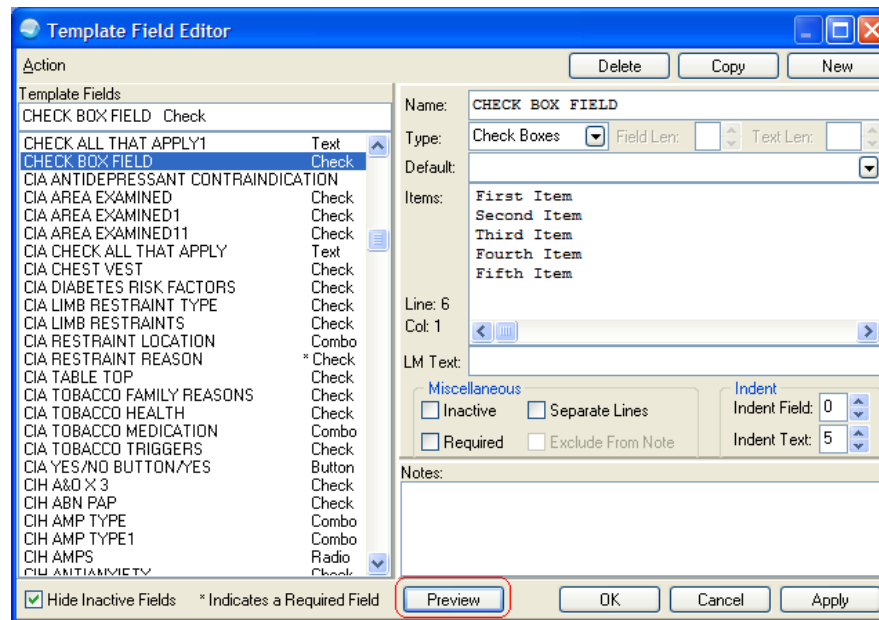
# Indenting

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



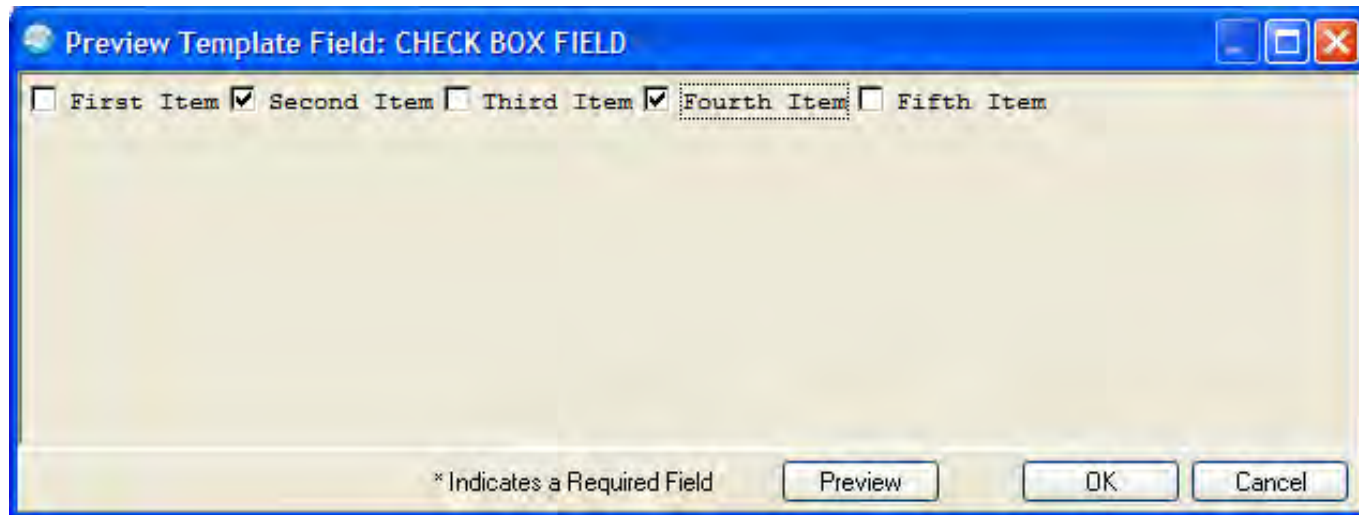
# Previewing a New Template Field

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



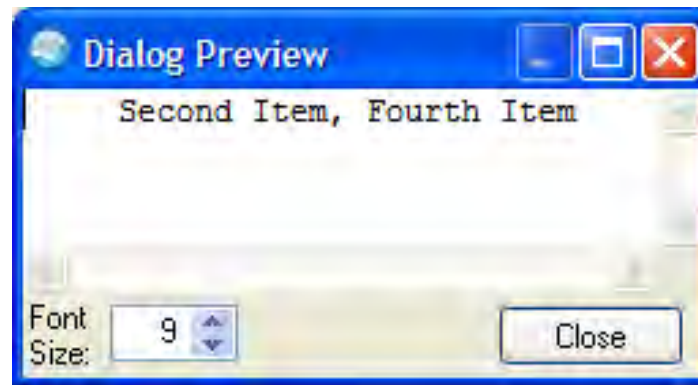
# Previewing a New Template Field

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



# Previewing a New Template Field

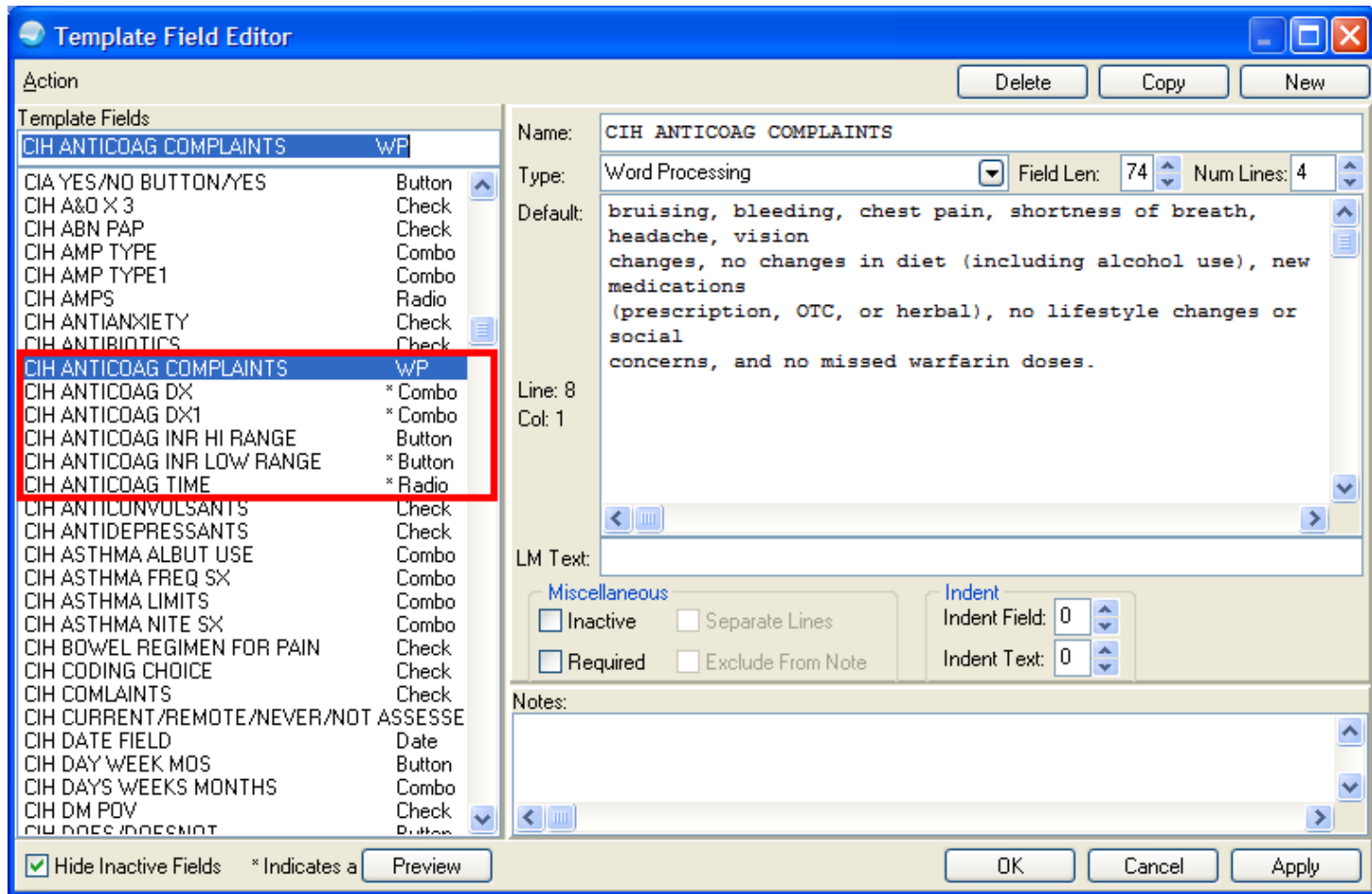
- Output Text:



# 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



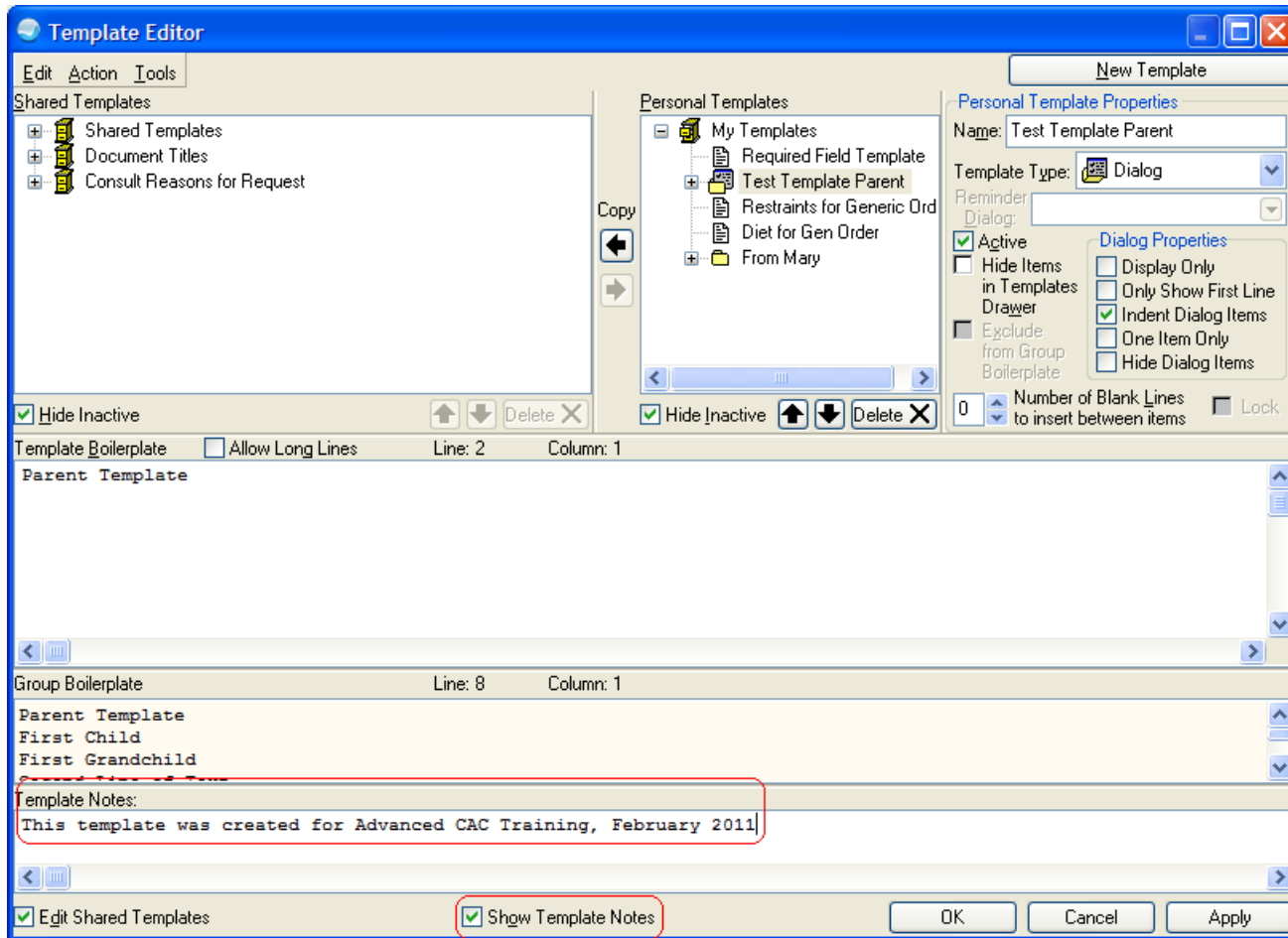
# Appearance of TIU Templates

- 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





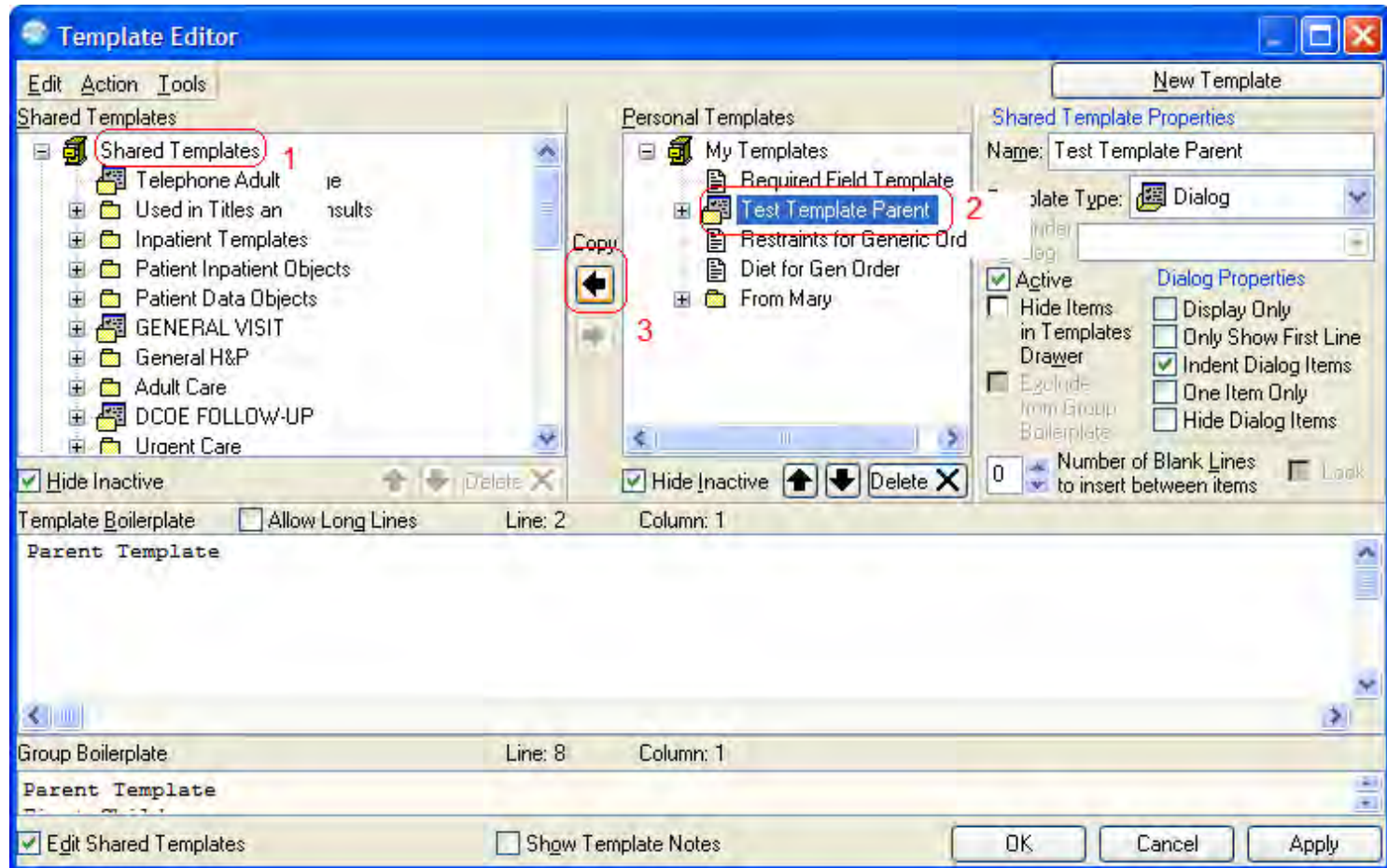
# Using the Copy Button

- 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

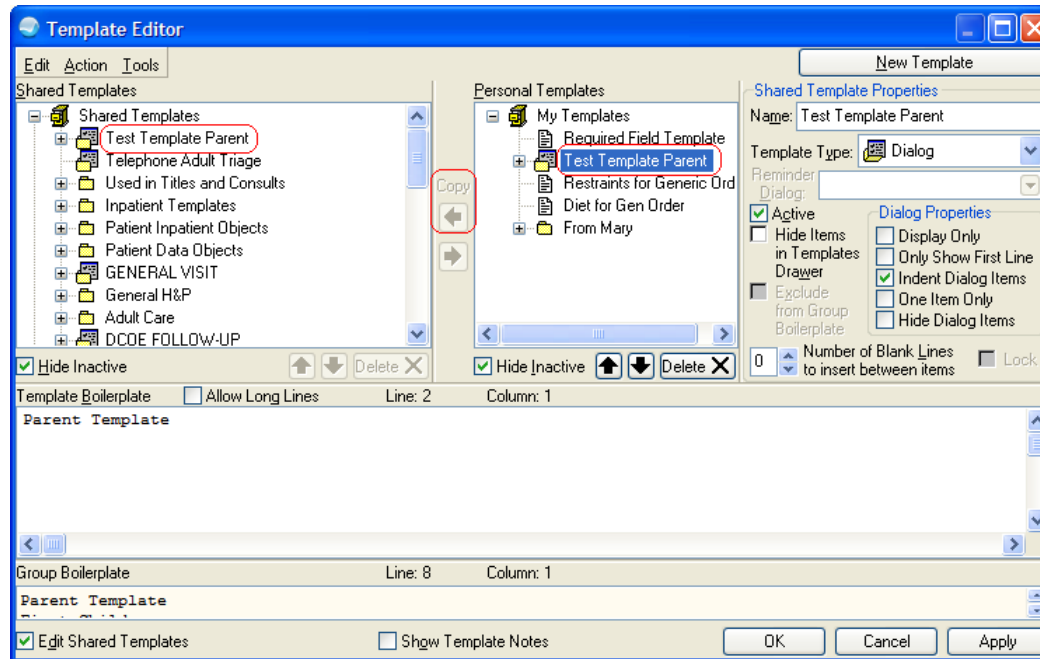
1. Click the destination folder (e.g. Shared Templates).
2. Click the template to copy.
3. Click **Copy**.

# Using the Copy Button



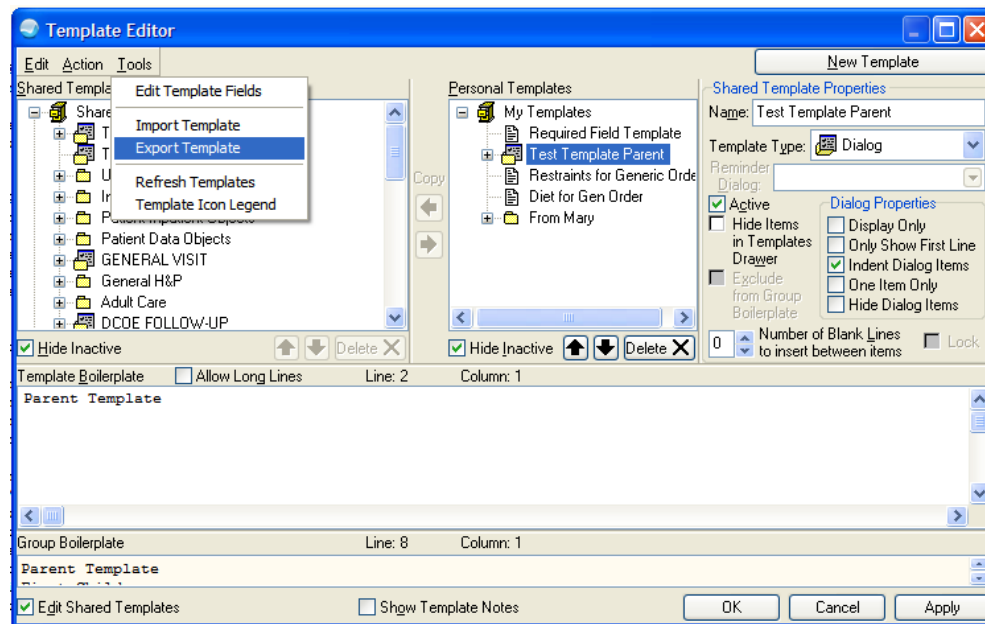
# Using the Copy Button

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



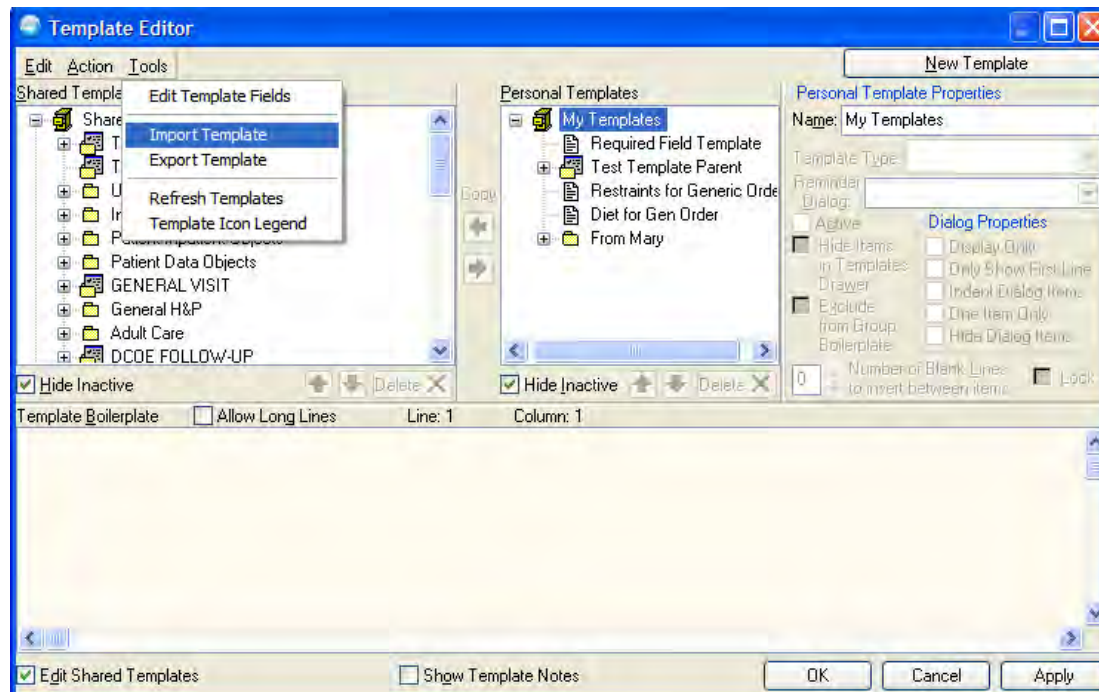
# Importing and Exporting

- Export:



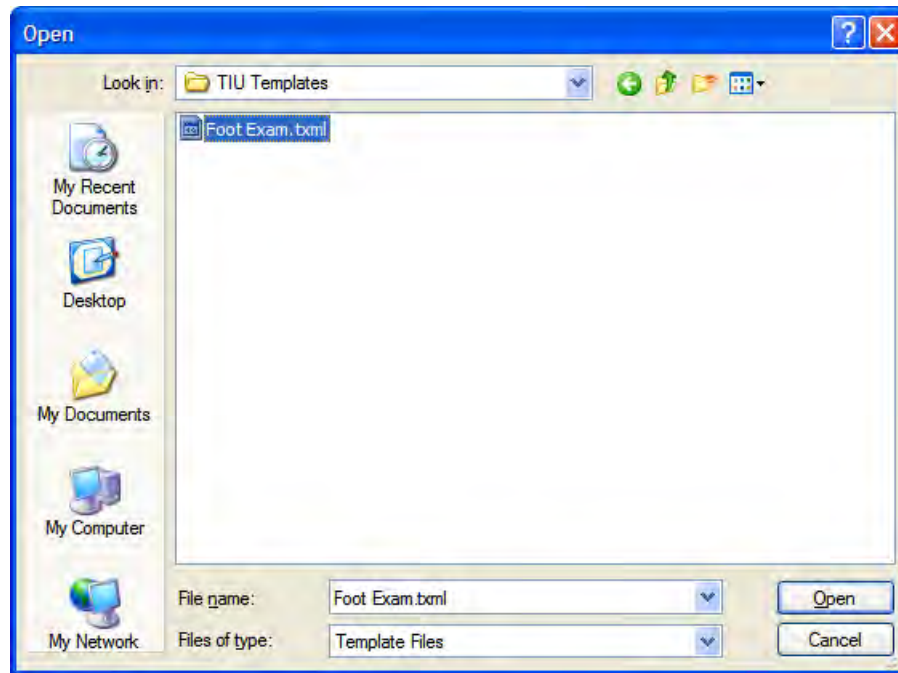
# Importing and Exporting

- Import (first select destination folder):



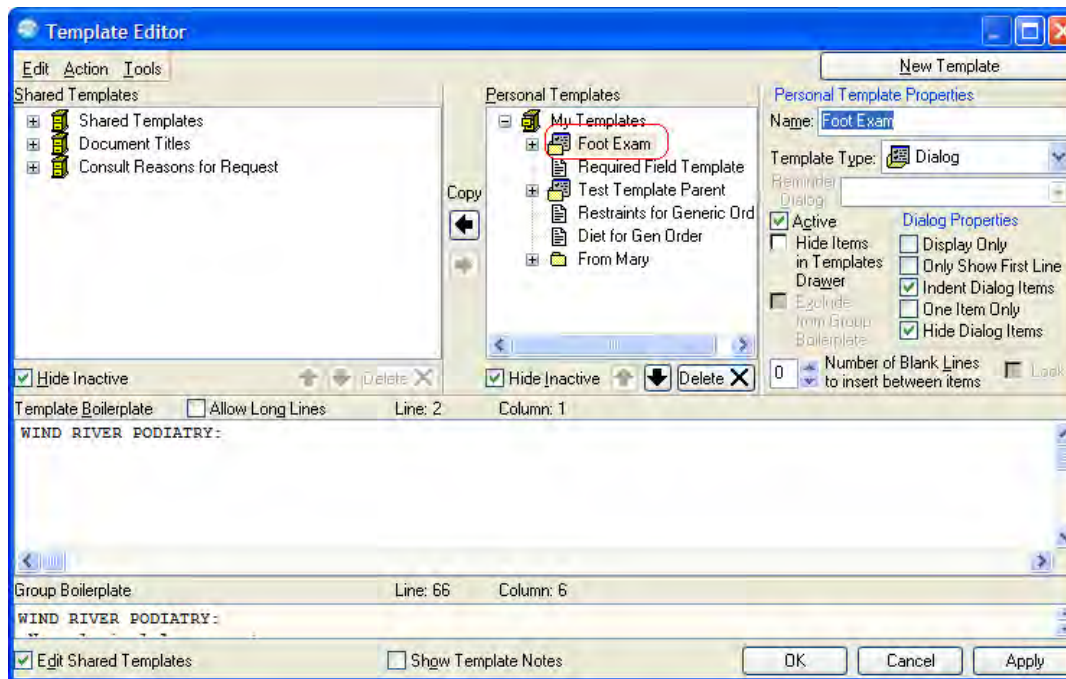
# Importing and Exporting

- Import (TIU Templates are .txml files):



# Importing and Exporting

- Import:

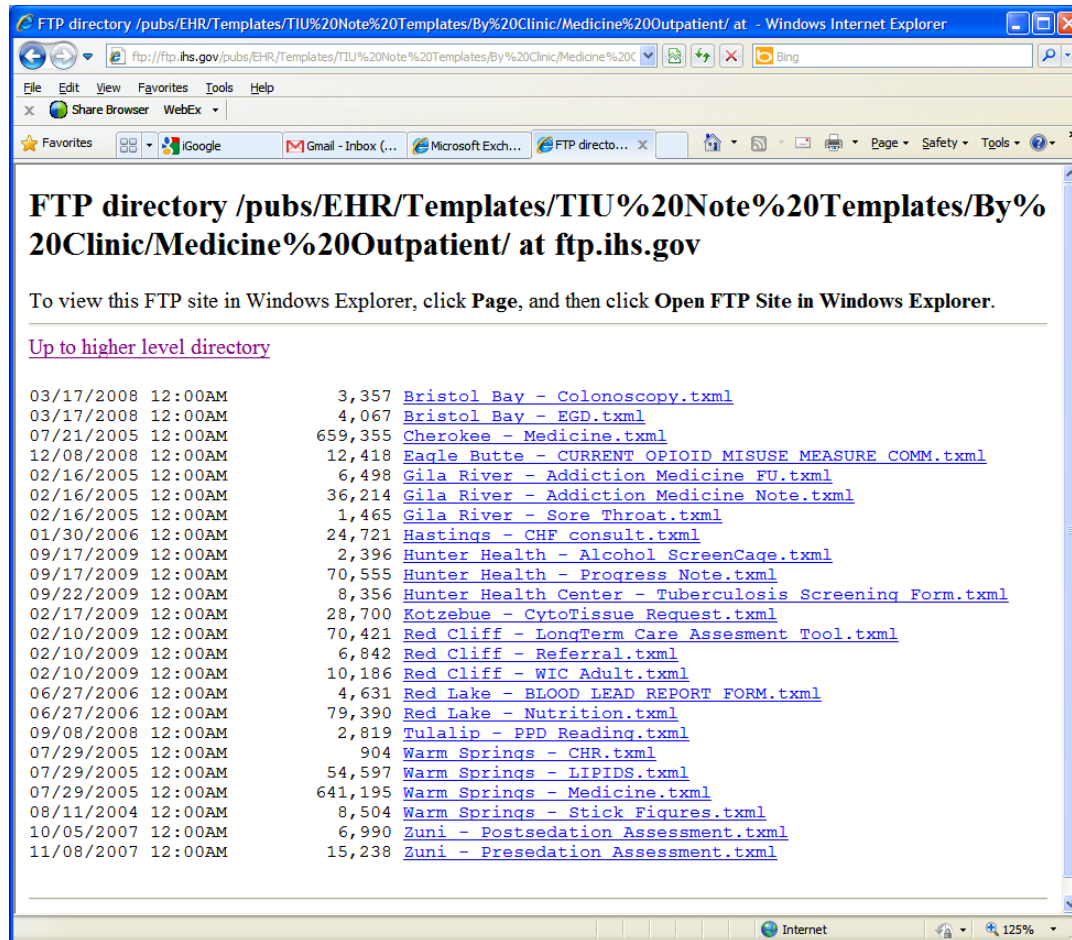




# Importing IHS Templates

- 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>
```

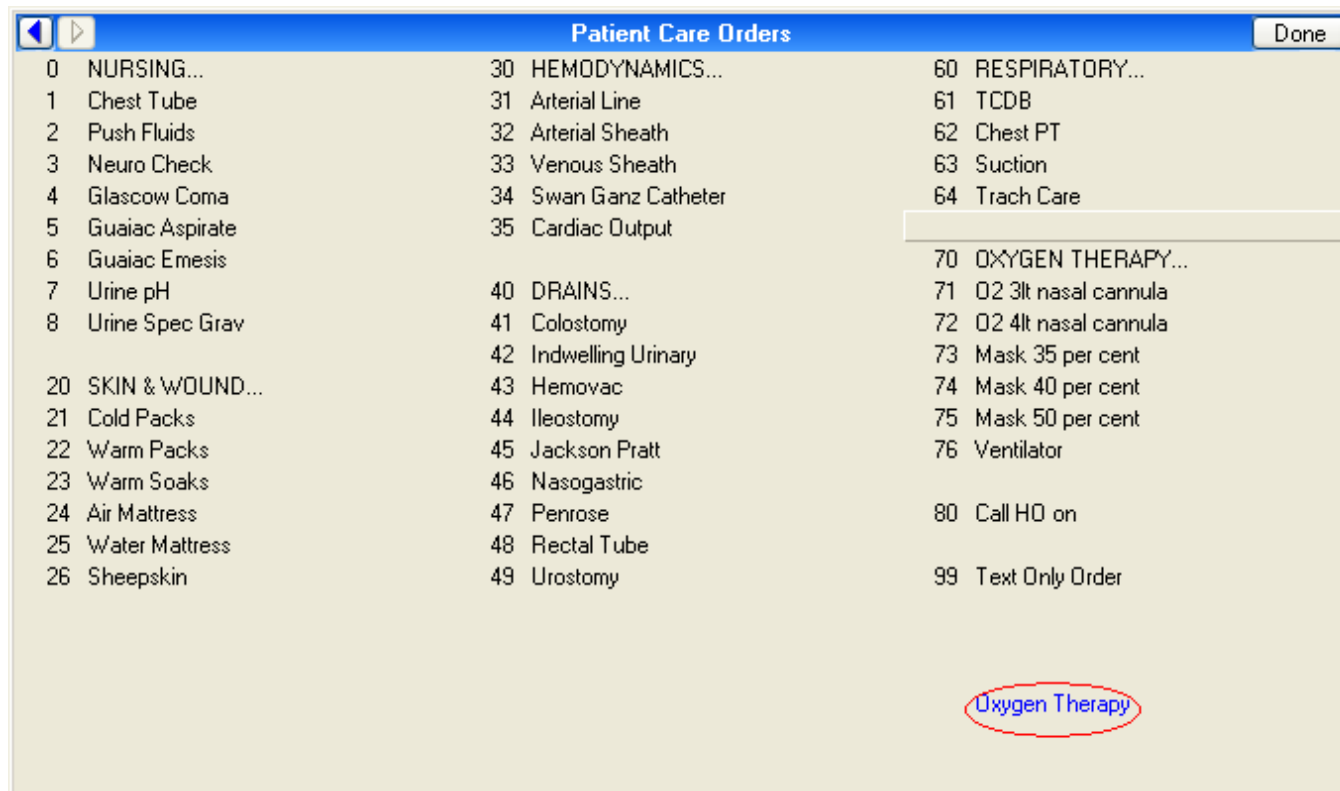
# Exported TIU Templates

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

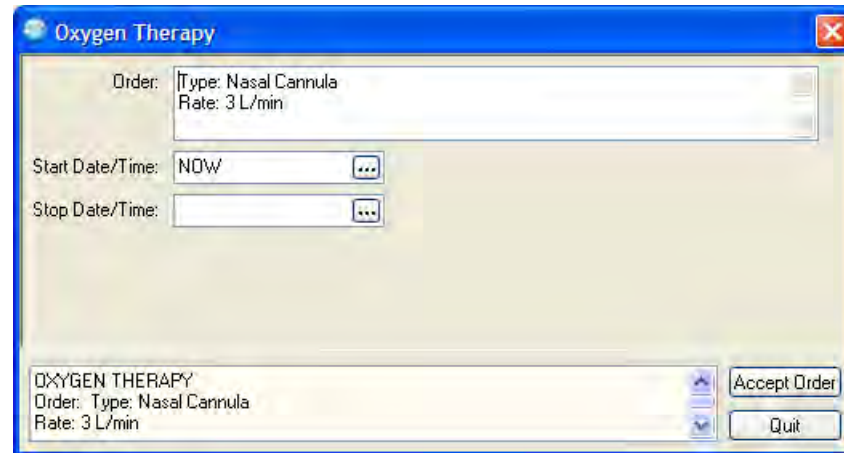
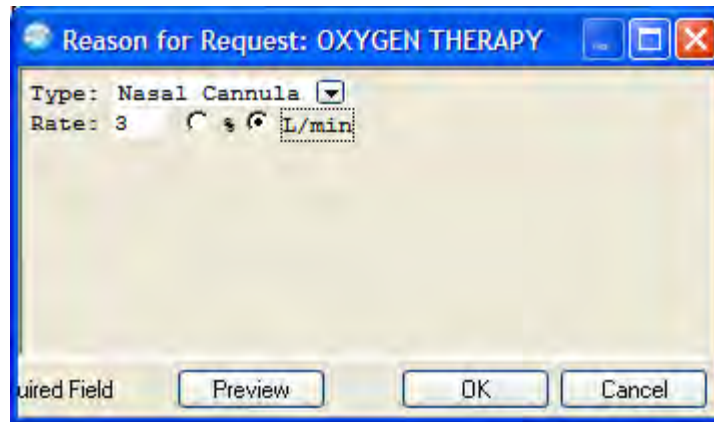
Type:   
Rate:  L/min

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

Required Field Preview OK Cancel



# Template Fields in Generic Order



# Template Fields in Generic Order

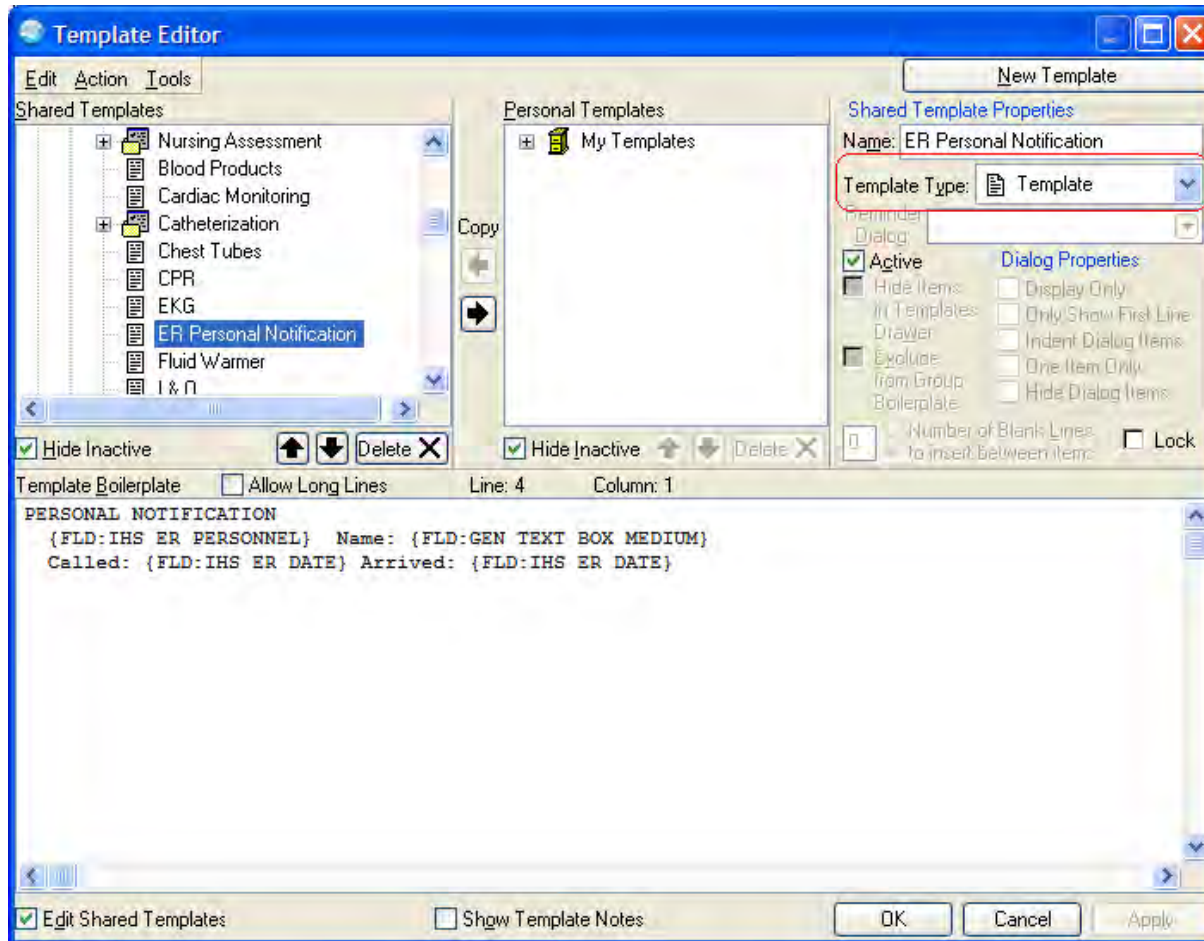
Current Orders (Active & Pending Status Only) - ALL SERVICES

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

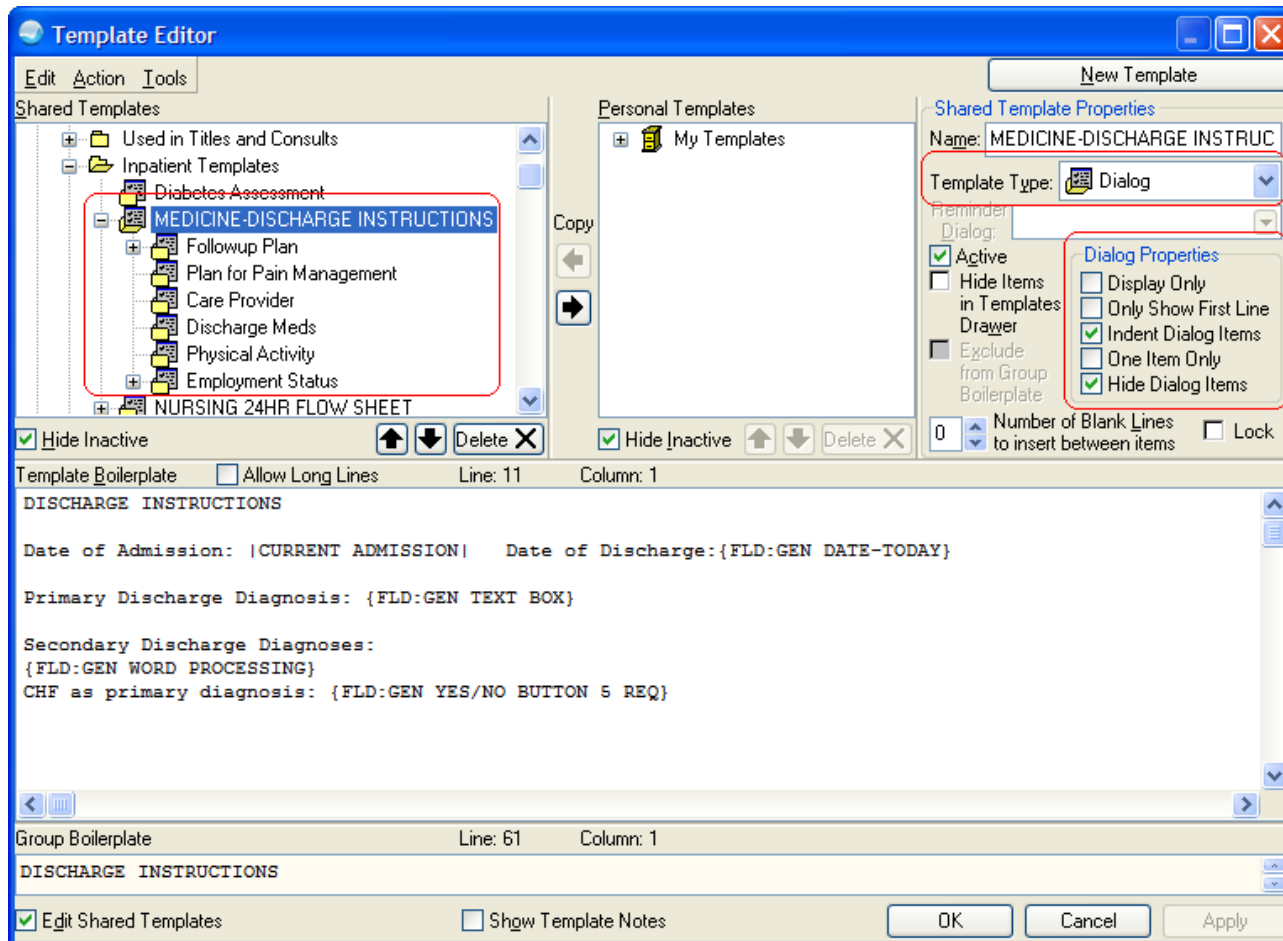
# Review of Template Types

- 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