

Suggested Best Practice Guidelines For Templates Within HealthOffice® Anywhere

HealthOffice Anywhere
Nursing Services
Electronic Medical Records

Items Logged | My Calendar | Help | UD Help | My Inbox Sign Out marg

Administration | Manage Template (Global) Student Search

Dashboard People Events/Items Special Education Billing Maintenance Administration Reports

New Search

Template Name: Exam Type: Status: Active

Roles: Category: Lock Settings:

Template Name	Exam Type	Roles	Status	Type	Category	
Baby tooth out	Office Visit	Administrators, Nurse Leads Group, Nurses, Nurse Manager	Active	Global	Dental	
Bee Sting (LT)	Office Visit		Active	Global	Global Template	
Bee Sting (NLT)	Office Visit		Active	Global	Global Template	
Bitten Lip/Tongue	Office Visit	Administrators, Nurse Leads Group, Nurses, Nurse Manager	Active	Global	Dental	
BP Check	Office Visit	Administrators, Nurse Leads Group, Nurses, Nurse Manager	Active	Global	Cardiac	
Bumped Head	Office Visit	Administrators, Nurse Leads Group, Nurses, Nurse Manager	Active	Global	Neuro	
Cardiac/Chest Wound		Administrators, Nurse				

Healthmaster Holdings® LLC is issuing this document strictly as a guide to use the Templates. Healthmaster® LLC takes no responsibility for State, District, or Individual School regulations mandated relating to Templates.

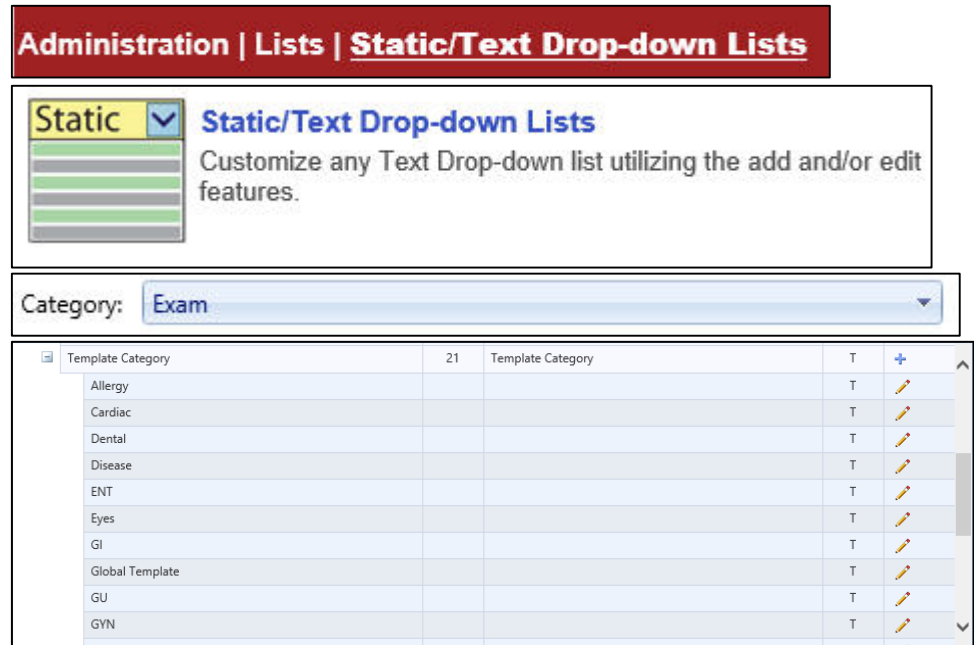
Healthmaster has included this document as part of the Release Information for reference purposes only.

3.0 Templates

The 3.0 Release of HealthOffice Anywhere has developed a new and exciting way of handling Templates within the software. All of the District's existing Templates are carried over and can be categorized into different sections, as desired.

Template Categories

All Template Categories are found within the Static/Text Drop-down List under the Exam Category.



There can be Categories such as:

Category	Event Type	Template Name	Personal (P) or Global (G)
Cardiac	OV	BP Check	G
Cardiac	OV	Chest Pain	G
Cardiac	OV	Chest Wound	G
Cardiac	OV	Shock	G
Dental	OV	Baby Tooth	G
Dental	OV	Bitten	G
Dental	OV	Knocked out/Chipped Tooth	G
Dental	OV	Mouth Ulcer	G
Dental	OV	Mouth/Gum	G
Dental	OV	Orthodontic Problems	G

Template Categories can be set up within the Static/Text Drop-Down List if you wish to display the Templates within Sub-Categories in the Template Drop-down on the Event screen.

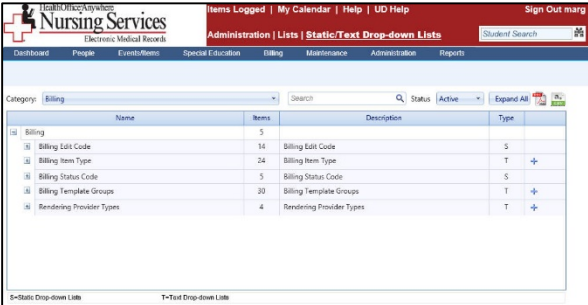

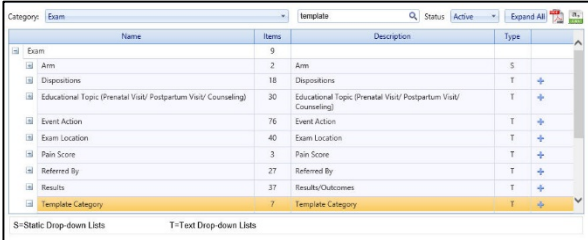



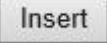
Setting Templates Categories

Follow the steps below to add Template Categories in the Static/Text Drop-down List:

Tip:
Categories can be used to organize your Templates into logical listings, such as:

- Cardiac
- Dental
- GI,

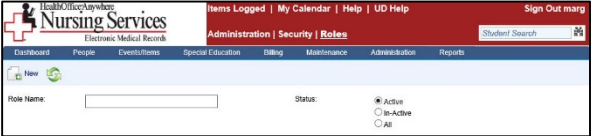

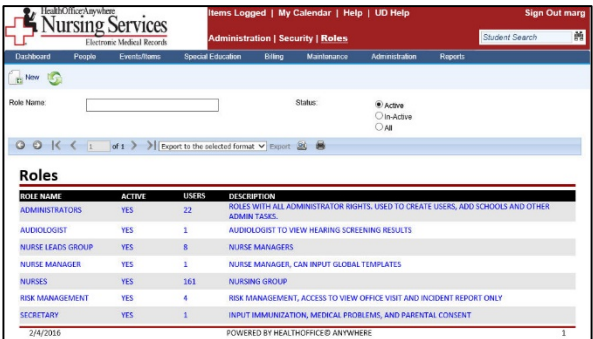


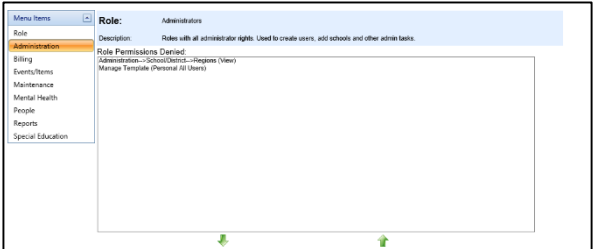
or any type of Category you would want to view Templates under while within an Event.

Action	Result
<p>1. Select the Static/Text Drop-down List from the Administration Drop-down menu at the top of the HealthOffice Anywhere screen.</p>	<p>The Static/Text Drop-down Lists screen is displayed.</p> 
<p>2. Select the Category of Exam.</p> 	<p>The Exam Category is displayed with the sub-category of Template Category listed.</p> 
<p>3. Select the  (Add Record) icon to start adding desired Categories within the Template Category.</p>	<p>The Name and Active fields are displayed allowing you to add a Category.</p> 
<p>4. Enter the name of the Template Category within the Name field and check the Active field.</p>	
<p>5. Select the  button.</p>	<p>The Template Category is added to the list.</p>
<p>6. Continue to add Template Categories, as desired.</p>	

Setting Templates within Roles





Templates are set within the individual Role as a security measure.

Follow the steps below to add Templates to each of the desired Roles HealthOffice Anywhere:

Action	Result
<p>1. Select Roles from Security under the Administration Drop-down menu at the top of the HealthOffice Anywhere screen.</p>	<p>The Roles Search screen is displayed.</p> 
<p>2. Select the  icon.</p>	<p>The Roles screen is displayed with all Roles.</p> 
<p>3. Select the desired Role by clicking on the Blue Hyper-link.</p>	<p>The Role Name is displayed along with their Description and all Menu Items along the left side of the screen.</p> 
<p>4. Select  from the Menu Items on the Left side of the screen.</p>	<p>The Administration screen is displayed. All Role Permissions Denied are displayed in the field at the top.</p> 

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Tip:
 The **Manage Template Personal (all Users)** offers the ability to view all Personal Templates that have been created by any and all Users.


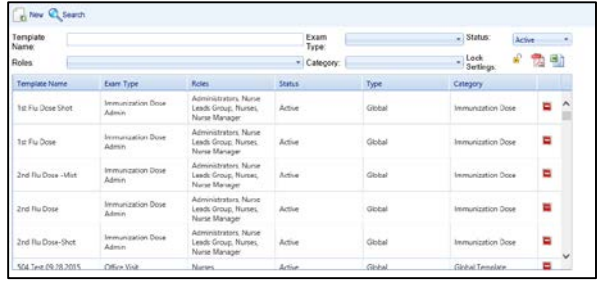
Action	Result
5. Select the desired Template option(s) that you wish to grant permission to the Role and move them down to the Role Permissions Granted field, using the  (Add) button. 	The selected Template options are displayed in the Role Permissions Granted field. 
6. Select the  icon at the top of the Administration Permissions screen.	The selected Templates are now saved to the desired Role.
7. Continue to add Templates to Roles, as desired.	

Overview

The Manage Template (Global) screen allows all Global Templates to be created or edited as desired for the District.

Accessing the Manage Template (Global) Screen


Follow the steps below to access the Manage Template (Global) screen:


Action	Result
<ul style="list-style-type: none"> Select  from the Administration Drop-down Menu. 	<p>The Manage Template (Global) screen is displayed.</p> 

The Manage Template (Global) Screen

The Manage Template (Global) screen offers the following Filters to narrow down the search for Templates:

Template Name	Enter the name that identifies the Template within the Event.
Exam Type	Select the type of the Event from the drop-down list.
Status	The status of the Template. Options include: <ul style="list-style-type: none"> All Inactive Active.
Roles	Check the desired Role(s) that has access to the Template.
Category	Select the Category to narrow down the search for Global Templates.


There is a  (Lock Settings) icon that allows you to lock the Filters as they are displayed to continue to maintain the search until you unlock the icon. This is very helpful when you are converting Templates from one type to another.

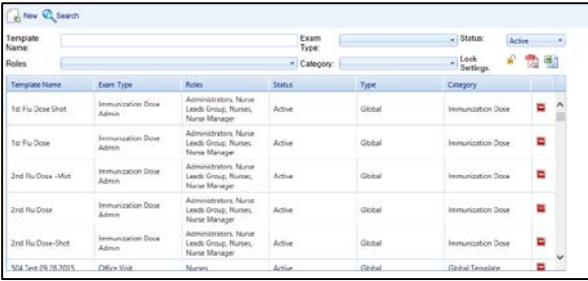


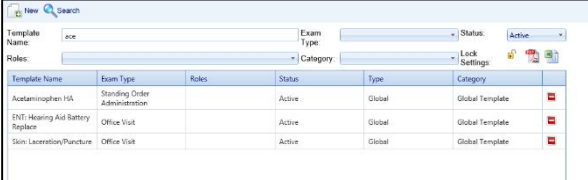
There is a  (PDF and CSV) icon to allow the printing of the list of the Templates.

The Templates display within a Grid that shows the Template Name, Exam Type, Roles that the Template has been assigned to, Status of the Template, Category of the Template, as well as a  (Manage Status) icon that offers the ability to change the status from Active to Inactive and back again, if desired.

Searching for Global Templates

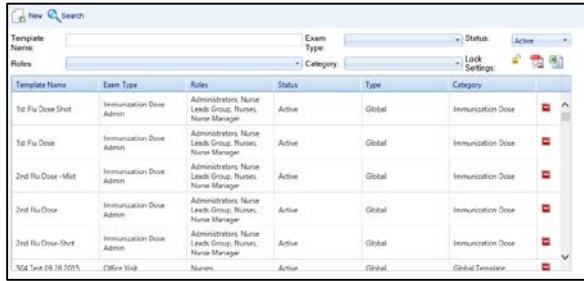
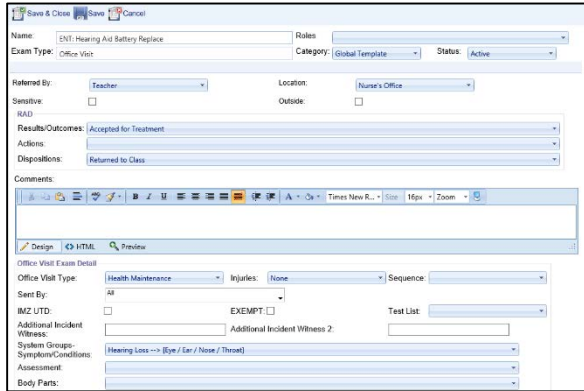


Follow the steps below to search for Templates on the Manage Template (Global) screen:

Tip:
 Select the  (Manage Status) icon at the end of the row if you wish to change the status of the Template.

Action	Result
1. Verify that the Manage Template (Global) screen is displayed.	
2. Populate one or more of the Filter fields to help narrow down the search for the desired Template.	
3. Select the  icon at the top of the Manage Template (Global) screen.	<p>All Templates that match the Filters are displayed in the Grid.</p> 

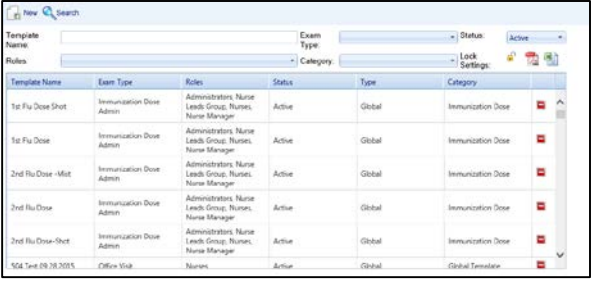


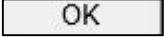

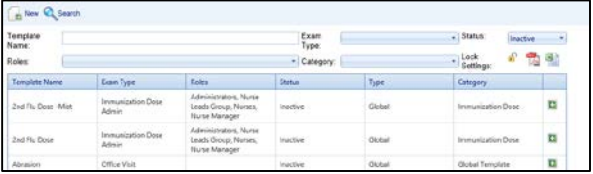
Editing Global Templates

Follow the steps below to make any edits to Templates on the Manage Template (Global) screen:

Action	Result
<p>1. Verify that the Manage Template (Global) screen is displayed with all of the desired Templates.</p>	
<p>2. Select the Template that requires editing.</p>	<p>The Edit Template screen is displayed allowing any changes to be made to all fields within the Event that have been labeled with a “T”.</p> 
<p>3. Edit all fields, as desired and select the  Save icon.</p> <p>or  Save & Close icon.</p>	<p>All changes are saved.</p>

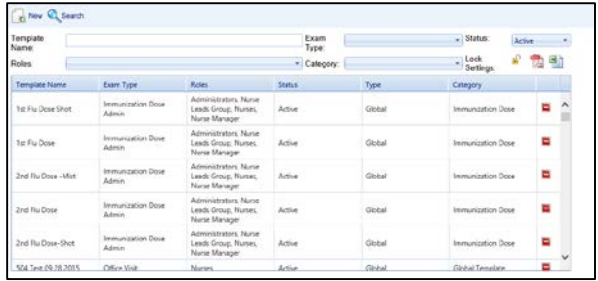



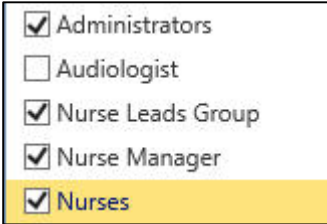


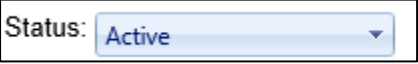
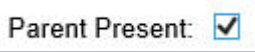


Changing the Status of Global Templates

Follow the steps below to change the status of Templates within the Manage Template (Global) screen:

Action	Result
<p>1. Verify that the Manage Template (Global) screen is displayed</p>	
<p>2. Select the  (Manage Status) icon at the end of the row for the Template to be changed.</p>	<p>The Confirm action screen is displayed.</p> 
<p>3. Select the  button on the Confirm action screen.</p>	<p>The Manage Template (Global) screen is displayed with the Template In its new status.</p>
<p>4. Select the Status Filter field and choose the  icon at the top if the screen.</p>	<p>All Templates with the desired status are displayed in the Grid.</p> 

Adding New Global Templates

Follow the steps below to add new Templates to the Manage Template (Global) screen:

Action	Result
1. Verify that the Manage Template (Global) screen is displayed	
2. Select the  icon at the top of the screen.	The New Template screen is displayed allowing new templates to be added to the desired Event.
3. Enter the Name of the Template in the Required Template Name field.	
4. Select the required Exam Type from the Drop-down list.	
5. Check the desired Roles that will be able to see this Template within the Roles field.	 
6. Select the desired Category that you wish the Global Template to be listed within.	
7. Select if the Status will be Active or Inactive.	
8. Select the fields within the Event that will be templated either by checking or choosing from a drop-down list.	 
9. Select the  icon.	All fields that have been set within the Template are saved.

Tip:

Remember, all fields within the Event that have been labeled with a “T” have the ability to be set within the Template.

Tip:


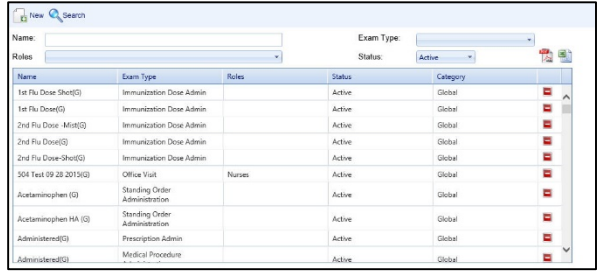
Please be aware that any new Global Templates will not have a “(G)” at the end of the Template Name. They will display in the color **Green** when they are viewed in the Event.

Overview

The Manage Template (Personal) screen allows users who have the proper security established, to create Templates for their own use.

Accessing the Manage Template (Personal) Screen

Follow the steps below to access the Manage Template (Personal) screen:

Action	Result
1. Select  Administration Drop-down Menu.	The Manage Template (Personal) screen is displayed. 


The Manage Template (Personal) Screen

The Manage Template (Personal) screen offers the following Filters to narrow down the search for Templates:

Template Name	Enter the name that identifies the Template within the Event.
User	Select the User that will be using the desired Template.
Status	The status of the Template. Options include: <ul style="list-style-type: none"> All Inactive Active
Exam Type	Select the type of the Event from the drop-down list.
Category	Select the Category that the Template is listed under. Since it is a Personal, it is in a Category of "Personal".




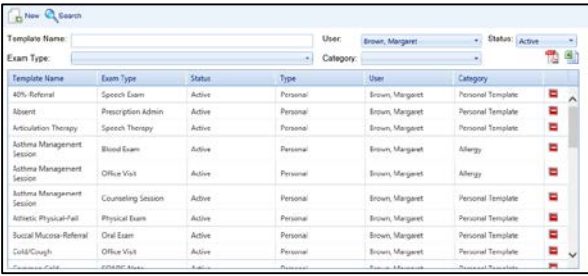


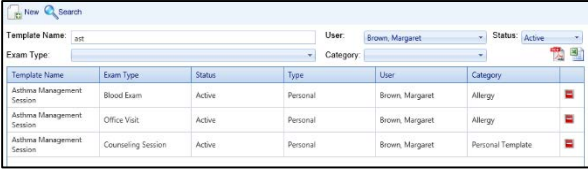
There is a  (PDF and CSV) icon to allow the printing of the list of the Templates.

The Templates display within a Grid that shows the Template Name, Exam Type, Status of the Template, Type of the Template, User that as well as a  (Manage Status) icon that offers the ability to change the status from Active to Inactive and back again, if desired.

Searching for Personal Templates

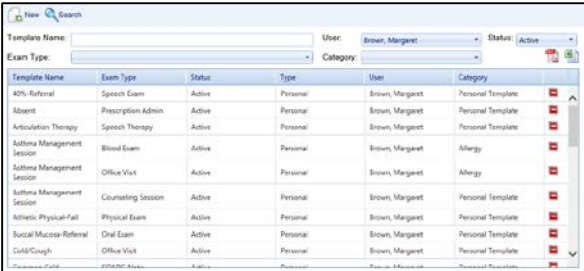
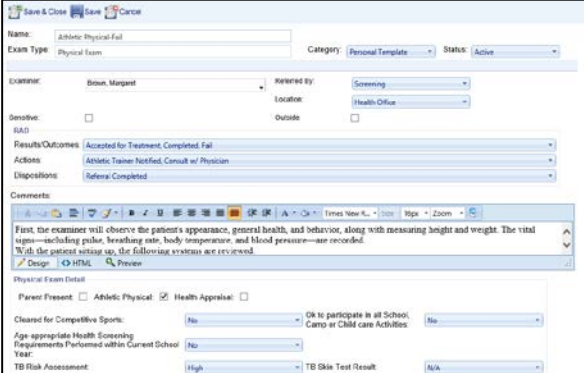


Follow the steps below to search for Templates on the Manage Template (Personal) screen:

Tip:
Select the  (Manage Status) icon at the end of the row if you wish to change the status of the Template.

Action	Result
<p>1. Verify that the Manage Template (Personal) screen is displayed.</p>	
<p>2. Populate one or more of the Filter fields to help narrow down the search for the desired Template</p>	
<p>3. Select the  icon at the top of the Manage Template (Personal) screen.</p>	<p>All Templates that match the Filters are displayed in the Grid.</p> 

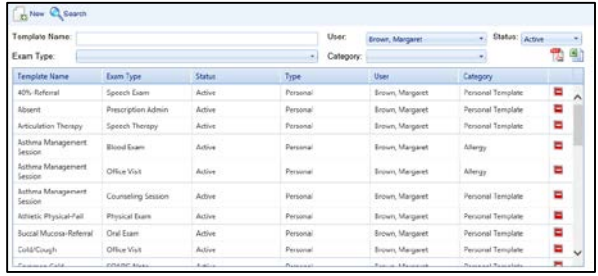

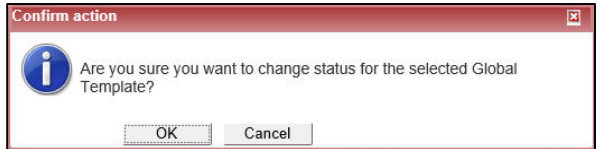
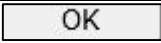

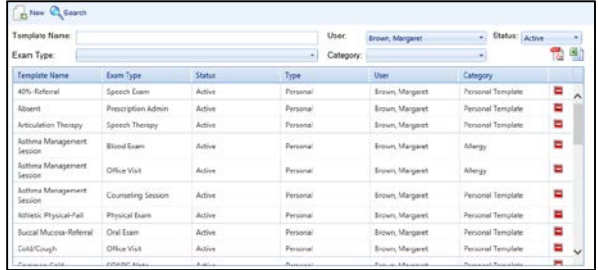
Editing Personal Templates

Follow the steps below to make any edits to Templates on the Manage Template (Personal) screen:

Action	Result
<p>1. Verify that the Manage Template (Personal) screen is displayed with all of the desired Templates.</p>	
<p>2. Select the Template that requires editing.</p>	<p>The Edit Template screen is displayed allowing any changes to be made to all fields within the Event that have been labeled with a “T”.</p> 
<p>3. Edit all fields, as desired</p>  Save and select the  Save & Close or icon.	<p>All changes are saved.</p>

Changing the Status of Personal Templates

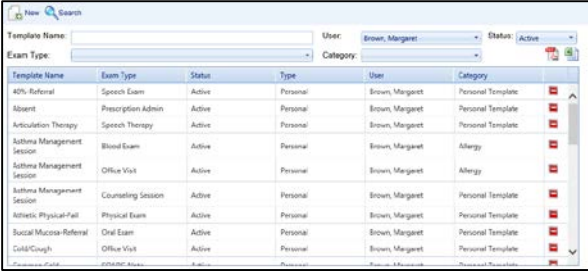

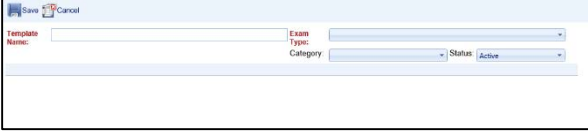

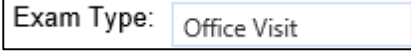
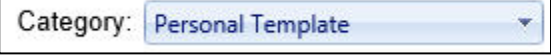

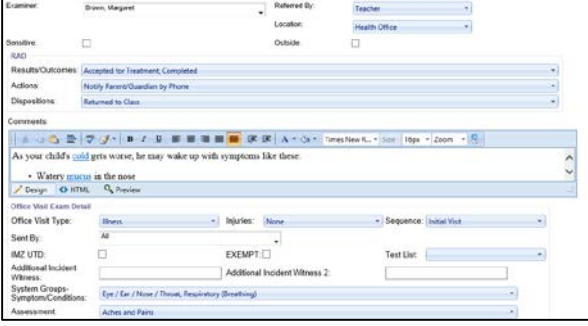

Follow the steps below to change the status of Templates within the Manage Template (Personal) screen:

Action	Result
<p>1. Verify that the Manage Template (Personal) screen is displayed.</p>	
<p>2. Select the  (Manage Status) icon at the end of the row for the Template to be changed.</p>	<p>The Confirm action screen is displayed.</p> 
<p>3. Select the  button on the Confirm action screen.</p>	<p>The Manage Template (Personal) screen is displayed with the Template in its new status.</p>
<p>4. Select the Status Filter field and choose the  icon at the top if the screen.</p>	<p>All Templates with the desired status are displayed in the Grid.</p> 

Adding New Personal Templates

Follow the steps below to add new Templates to the Manage Template (Personal) screen:

Tip:
Remember, all fields within the Event that have been labeled with a "T" have the ability to be set within the Template.

Action	Result
<p>1. Verify that the Manage Template (Personal) screen is displayed.</p>	
<p>2. Select the  icon at the top of the screen.</p>	<p>The New Template screen is displayed allowing new templates to be added to the desired Event.</p> 
<p>3. Enter the Name of the Template in the Required Template Name field.</p>	
<p>4. Select the required Exam Type from the Drop-down list.</p>	
<p>5. Select Personal Template from the Category field.</p>	
<p>6. Verify that Active is displayed in the Status field.</p>	
<p>7. Select the fields within the Event that will be templated either by checking or choosing from a drop-down list.</p>	
<p>8. Select the  icon.</p>	<p>All fields that have been set as within the Template are saved.</p>