How to Create Start Templates and Add On Templates

What are Templates:

- Templates in SamNotes allow you to customize what you would like to say in a sentence format with the correct punctuation and detail that you may want.
- In SamNotes, templates are made up of several objects of which will be defined in greater depth on the following pages.
  - o Merge Codes
  - o Choice Structures
  - o Add on structures
  - o Pre Made Structures

What is a Start Template:

Start templates MUST be used in order to start your note. All Start templates must start with the date on the upper left hand corner of the template.

Below are the steps to develop a Start Template:
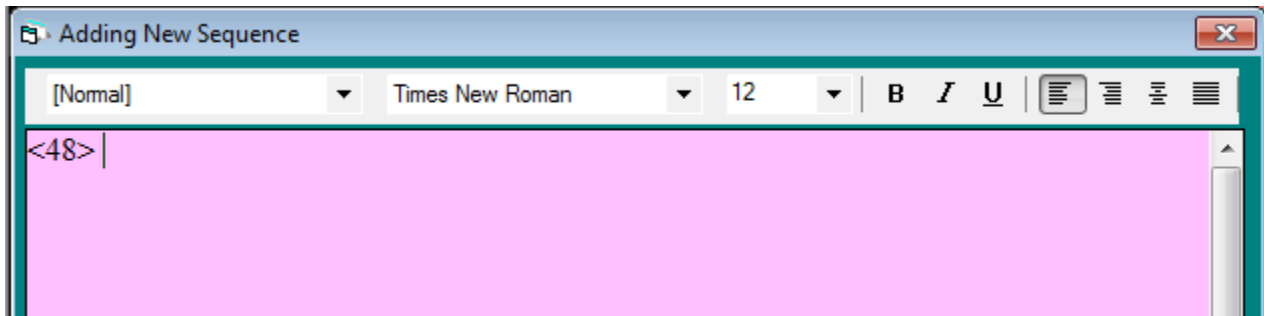
Select a patient
Click on the NEW green button on the dashboard

Click on the yellow New Template button.

When you click on the yellow button SamNotes will open up a screen:

This screen will have the code <48> which stands for today's date. Which is a special structure. If you click into these structures it will give you what that structure means and what information will be pulled into the note.

There are other codes you can put here as well:
<48> = Today's Date
<52-1> = Date of last claim done in Sammy
<00> = Lets you choose the date that you want with a pop up.
The date of the note must _**ALWAYS**_ be in this format: MM/DD/YYYY

**The date always needs to appear first in your note.**

What is a Add-on Template:

Add on templates can be utilized to include additional information into your start template. These templates can be placed in any other template (either start or add on) and can be accessed automatically at a predefined spot in the note. If the add on template is used in other templates and a change must be made, the only place you need to change it – is in that specific template instead of editing each template separately. We recommend using add ons for treatment plans and if you are looking to bulk up your note with information.
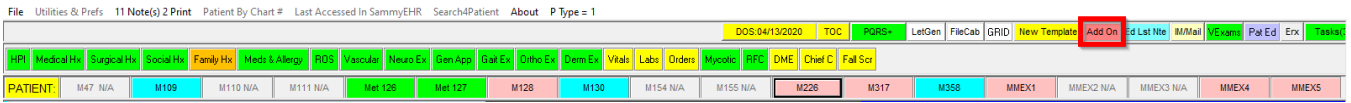
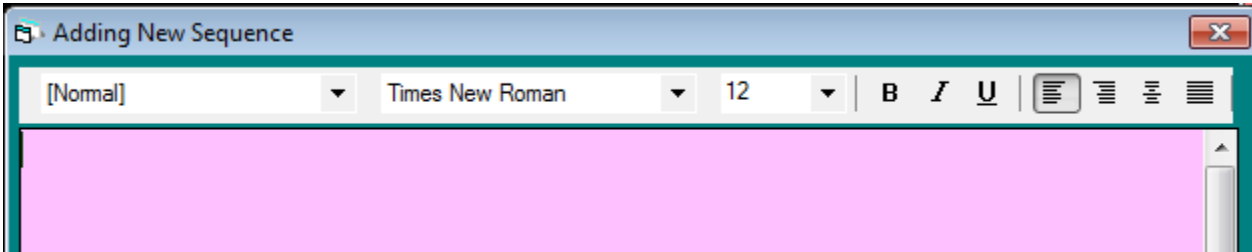**Below are the steps to develop an Add On Template:**

Select a patient
Click on the NEW green button on the dashboard

Click on the pink New Add-On button.

When you click on the pink button SamNotes will open up a different screen:

Unlike a start template this screen does NOT have a code in the upper left hand corner. You can simply start typing here.