

## SAMNOTES 202: READING AND FIXING TEMPLATES

### Naming Convention for Add On Templates

The way add on templates are named is extremely important when creating templates. It is best to group your templates by name/topic.

Example:

The Plan templates are all grouped together, because I have named them all with the first word “Plan”. We broke down the templates further by then putting the topic of the problem next to it : “Plan Heel Pain”. We broke it down again by putting in what the plan actually was “Plan Heel Pain Injection”.

This way you can sort your templates by not only the plan but the diagnosis as well.

You can also make generic templates that can be used for everything: Ex: Padding and strapping can be used for multiple diagnoses. The naming convention for this template may be: “Plan Padding and Strapping”

**NOTE: The add-ons are CASE SENSITIVE!!!!** If you want to call a “Plan” template but you call it from the start or add on template as <?plan> instead of <?Plan> you will get a message:

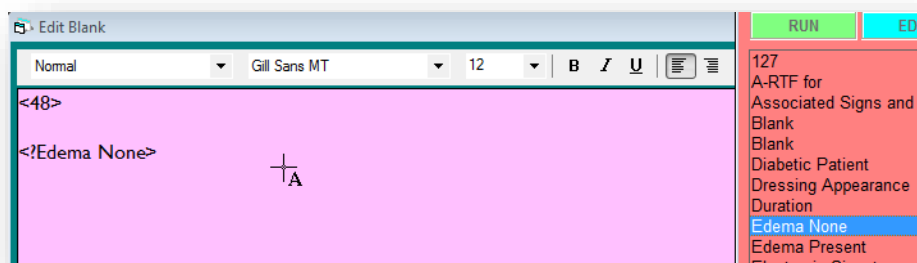


### Utilizing Add On Templates

*Placing an Add on into a Template*

**Step 1:** Create or edit a template.

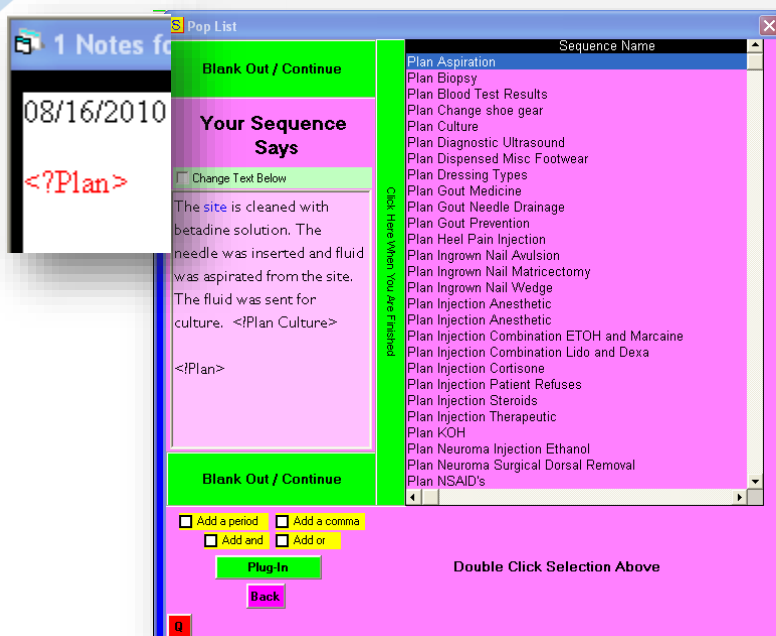
**Step 2:** In the pink side drag the add on template you would like to use in your note template. Sammy will place a Question mark in front of the template.



*Using the Single Question Mark*

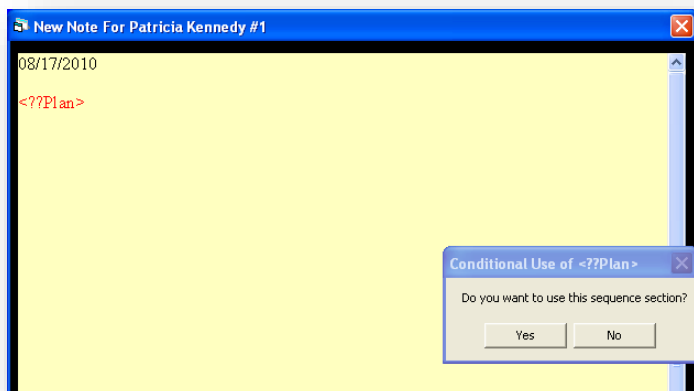
This structure will automatically pop up the referenced add on (must be case sensitive) and place it into the template that you are running and will allow you to answer the series of questions and complete your note.

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Ex: If a template is named “Plan Heel Pain” and the structure reads: <?Plan Heel Pain> that template will be automatically added to your note because it’s an exact match.

Ex: If one add on template is named “Plan Heel Pain” and one add on template is named “Plan Gout” and the structure reads: <?Plan> then all templates that start with the word “Plan” will pop up. This is not an exact match. At this point you choose the one you want by double clicking.



### Using the Double Question Mark

<??Plan> Having two question marks in front of any add on structure will give you the option to use an add on or not.

If you choose “Yes” then SamNotes will take you to the templates that you can choose....or automatically take you to that specific template.

If you choose “No” SamNotes will skip over this template and leave a space/line.

### Using the Triple Question Mark

<???Plan> This structure works ALMOST the same way that the double question mark structure works. They are different in the way they space out your template.

1. If a double question mark is used and you answer no to the pop up question (and it’s on a line by itself) then it will leave a blank line where the double question mark structure is.
  2. If a triple question mark is used and you answer no to the pop up question (and it’s on a line by itself) then it will not leave a line.
- Moral of the story: When in doubt use a triple question mark!

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### Global Variables

A global variable is used to repeat information in a note. The global variable allows you to answer the question once and the system takes that information and places it into all the other areas of the note where it is needed.

#### Assign a global variable BEFORE you run the template

When you want to determine a global variable before you run the template....put the global variable in the structure. Then wherever you want to repeat that variable, place the code for the global variable. The code for the global variable should not be in brackets it should read GV1GV. The first time you assign the variable you will see the global variable turn green.

An example of when you would use a global variable is when you want to remember a site. See below for an example and steps.

#### Set - Up

**Step 1:** Edit a template or create a new one.

**Step 2:** Initiate the Wizard by double clicking.

**Step 3:** Choose the type of choice structure you would like to create.

**Step 4:** Put your choices into the wizard.

**Step 5:** Click on the global variable you would like to use (GV1GV, GV2GV, etc.)

**Step 6:** Press the Create Structure button to see the preview of the structure you just created with the global variable.

**Step 7:** Press the Insert Structure into myTemplate button to place the structure into your template.

SamNotes Wizard

| No. of Items | Your Text      |
|--------------|----------------|
| 1            | the right foot |
| 2            | the left foot  |
| 3            | both feet      |
| 4            |                |
| 5            |                |
| 6            |                |
| 7            |                |
| 8            |                |
| 9            |                |
| 10           |                |
| 11           |                |

<GV1GV\the right foot\the left foot\both feet>

If you want to have this structure placed in your template at the last cursor position, just click on 'Insert Structure Into My Template'.

☒ GV1GV
 ☐ GV7GV
 ☐ GVDGV
 ☐ GVJGV
 ☐ GVPGV
 ☐ GV2GV
 ☐ GV8GV
 ☐ GVEGV
 ☐ GVKGV
 ☐ GVQGV
 ☐ GV3GV
 ☐ GV9GV
 ☐ GVFGV
 ☐ GVLGV
 ☐ GVRGV
 ☐ GV4GV
 ☐ GVAGV
 ☐ GVGGV
 ☐ GVMGV
 ☐ GVSgv
 ☐ GV5GV
 ☐ GVBGV
 ☐ GVHGV
 ☐ GVNGV
 ☐ GVTGV
 ☐ GV6GV
 ☐ GVCgv
 ☐ GVIGV
 ☐ GVOGV
 ☐ GVUGV

☐ Std Multiple Choice  
☒ Single Choice  
☐ Admits/Denies (TF)  
☐ Admits (T\$)  
☐ TC Multiple Choice  
☐ TN Multiple Choice  
☐ Other Multiple (T@)  
☐ No Commas/And (\$)  
☐ No Period At End (T's)  
☐ Alphabetize When Done

Create Structure  
 Insert Structure Into My Template  
 Close  
 Convert To Multiple Choice

**Step 8:** Place the GV1GV (global variable) in the template where you would like it to repeat.

The patient has pain on <GV1GV\the right foot\the left foot\both feet>

The GV1GV was injected with lidocaine.

**Step 9:** Save the template.

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### Running the Template with the global variable

When you double click on the template with the global variable in it, Sammy will highlight the global variable in green. When you choose the “the right foot.” The other place that you have the GV1GV will automatically have “the right foot.”

14 Notes for Jim Grayson (9)

06/04/2013

The patient has pain on <GV1GV\the right foot\the left foot\both feet>

The GV1GV was injected with lidocaine.

Answer The Question

You can change any of these now! Jus

|   |                |
|---|----------------|
| 1 | the right foot |
| 2 | the left foot  |
| 3 | both feet      |

Click On Any Number Above or Add an item (per

Use

|   |                                |
|---|--------------------------------|
| <input checked="" type="checkbox"/> GV1GV | <input type="checkbox"/> GV7GV |
| <input type="checkbox"/> GV2GV            | <input type="checkbox"/> GV8GV |
| <input type="checkbox"/> GV3GV            | <input type="checkbox"/> GV9GV |
| <input type="checkbox"/> GV4GV            | <input type="checkbox"/> GVAGV |
| <input type="checkbox"/> GV5GV            | <input type="checkbox"/> GVBGV |
| <input type="checkbox"/> GV6GV            | <input type="checkbox"/> GVCGV |

The patient has pain on the right foot

The the right foot was injected with lidocaine.

### Looping Add On Templates

You can have multiple loops and add on templates within add on templates. Another way to think about different types of templates is like folders. You can have a yellow folder and have multiple pink folders within yellow folders and you can have pink folders with in pink folders.

Plan: The patient was advised of the possible treatments available: strapping and tapping. <?Plan>

**Your Sequence Says**

☐ Change Text Below

The site is cleaned with betadine solution. The needle was inserted and fluid was aspirated from the site. (Tx=20605) <??Plan Culture>

<?Plan>

Click Here When You Are Finished

- Plan Aspiration Small Joint (Tx=20600)
- Plan Biopsy
- Plan Blood Test Results
- Plan Change shoe gear
- Plan Culture
- Plan Debridement Skin Fissure
- Plan Debridement Wound/Ulcer
- Plan Diagnostic Ultrasound
- Plan Dispensed Misc Footwear
- Plan Dressing Types Advanced
- Plan Dressing Types Basic
- Plan Fiberglass Cast
- Plan Fracture Ankle Closed Reduction Cast
- Plan Fracture Cam Walker
- Plan Gout Lab
- Plan Gout Medicine
- Plan Gout Needle Drainage
- Plan Heel Pain
- Plan Hygiene
- Plan I&D (Tx=11060)
- Plan Informed Consent
- Plan Ingrown Nail Avulsion
- Plan Ingrown Nail Matricectomy

**Blank Out / Continue**

☐ Add a period ☐ Add a comma

Plan Aspiration has another <?Plan> at the end of the template, causing the list to pop up again.

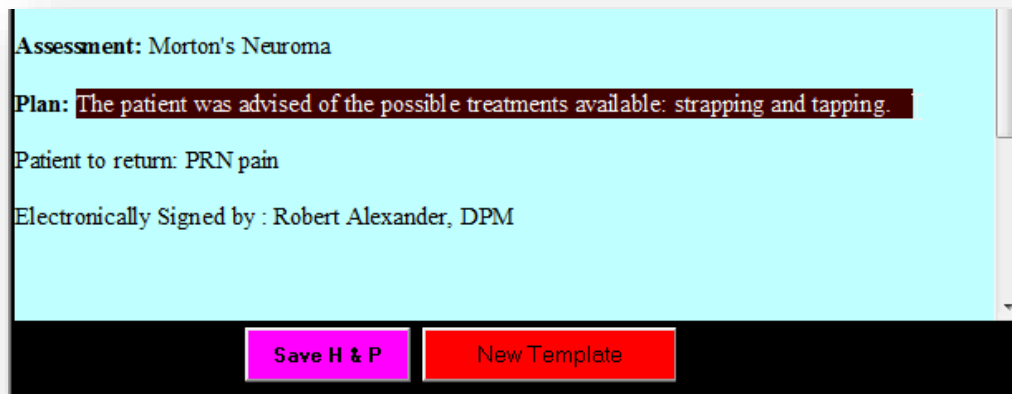
Or simply click Blank out/Continue to end the looping and return to the note.

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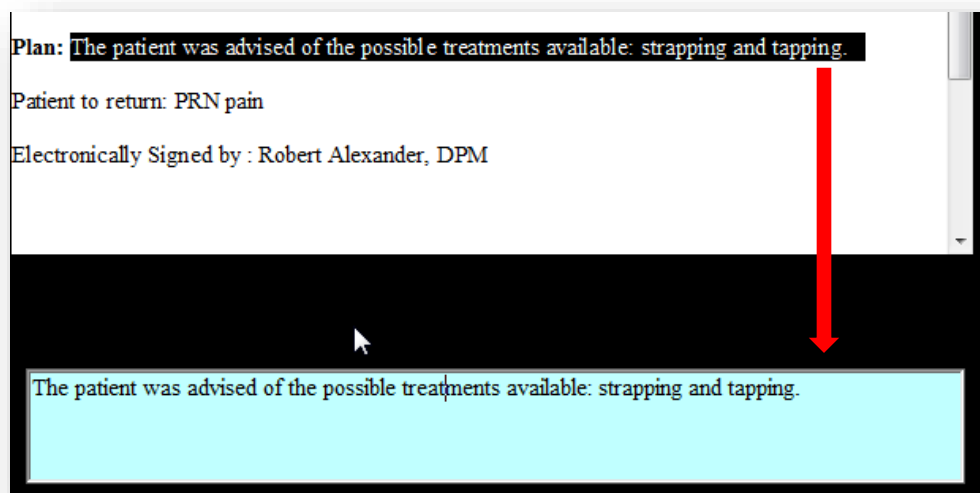
### Making a Template Using Text from the Note

When you are doing a chart note you are running a template. When the template finishes running, you can edit your chart note as needed before you continue on to print and/or save it. At this point you may feel that a portion of your note is worth saving as “its own template”.

Put the cursor (or point the mouse) at the beginning of the area you want to select. By using your mouse highlight the text you want to save. When all of what you want is selected, you will see a button on the lower window that says new template. Click “New Template.”

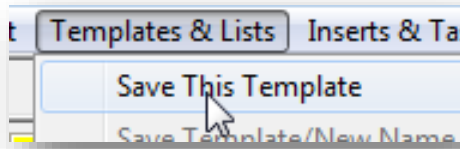


Your text will automatically be copied to the bottom window. To take a section of this chart note and save it as a new template – whether it’s a start template or an add-on template- you need to make sure that the active window is the window on the bottom of the SamNotesEHR window. You will see the cursor there.



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With that window active, click on Templates and Lists, Then click “Save this Template.”



You can save the new template as a Start Note Template or as an Add-on Template. Once you “Save” the template it will be saved in either the start note list or add-on list for future use.



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### Choice Structures:

| Structure Type  | Structure Definition  | Basic Example  | Advanced Example  |
|-----------------|---|--|---|
| Single Choice   | -Allows 20 different choices but you can only use ONE of those choices  | Patient presents today to the office today complaining of pain for <the first time\ follow up>.  | <Patient may return to work.\Patient may not return to work.\Patient may drive a car.\Patient may not drive a car.\Patient was given verbal instructions to exercise <13-5> toe>  |
| Multiple Choice | -Allows you to use 20 choices and you can choose multiple choices.<br>-When used in the advanced format a \$ must be used in order for the punctuation to be removed. | The site was<br><warm tender swollen reddened painful>.  | <\$Patient may return to work.  Patient may not return to work.  Patient may drive a car.  Patient may not drive a car.  Patient was given verbal instructions to exercise <13-5> toe  Patient was given verbal instructions to exercise <13-5> foot  Patient was not given verbal instructions to exercise <13-5> toe  Patient was not given verbal instructions to exercise <13-5> foot>  |
| TC Structure    | -Allows you to have up to 60 choices.<br>-Have a start off sentence. - Punctuation is automatic.  | <TC  The patient  has had previous treatment for this problem consisting of  injections  orthotics  aspiration  NSAID's  padding  antibiotics    has had no previous treatment  TC>  | <TC    aching  blanching of digits  bleeding  burning  cachexia  cyanosis  feet turning in  fever  foot numbness  irritation  joint pain  joint redness  low back pain  AM joint stiffness lasting 5-10 minutes  AM joint stiffness lasting longer than one hour  numbness  pain  TC>   |
| TN Structure    | -Allows you to have up to 60 choices.<br>-Have a start off sentence.<br>-There is NO punctuation.   | <TN  Patient  is to limit activities.  is to modify activities.  is to resume activities.  Patient to continue  Patient to discontinue  wearing surgical shoe.  wearing the cast.  wearing normal shoe gear.  wearing athletic shoes.  Patient may return to work.  Patient may not return to work.  Patient may drive a car.  Patient may not drive a car.  Patient was given verbal instructions to exercise <13-5> toe  Patient was given verbal instructions to exercise <13-5> foot  Patient was not given verbal instructions to exercise <13-5> toe  Patient was not given verbal instructions to exercise <13-5> foot  TN> | <TN    No evidence of infection  Some evidence of infection  no evidence of inflammation  some evidence of inflammation  no evidence of wound dehiscence  some evidence of wound dehiscence  swelling of surgical site is mild  swelling of surgical site is moderate  swelling of surgical site is severe  swelling of surgical site is not evident  patient is afebrile  patient is febrile  sutures are intact  sutures are not intact  there are no sutures  the wound is well coapted  x-rays were not taken  x-rays were taken  TN> |