

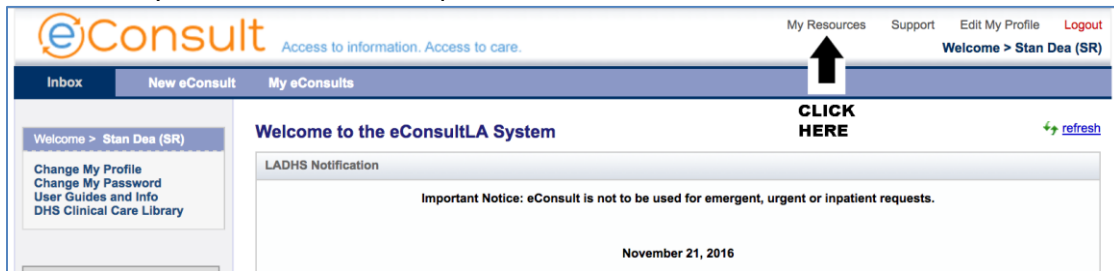
JOB AID – CREATING AND USING TEMPLATES

FEB 2017

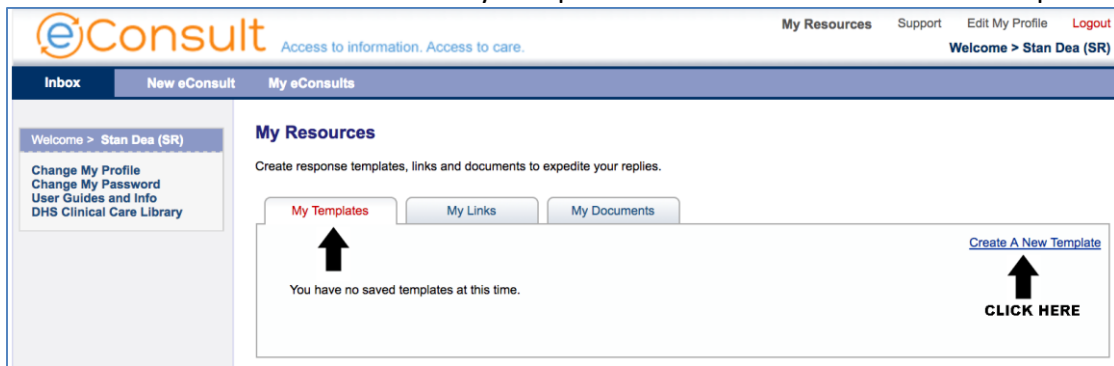
This job aid is to instruct users how to create and use templates. Templates are useful for text utilized frequently as a response to a consult without the need of typing it more than once.

CREATING A TEMPLATE

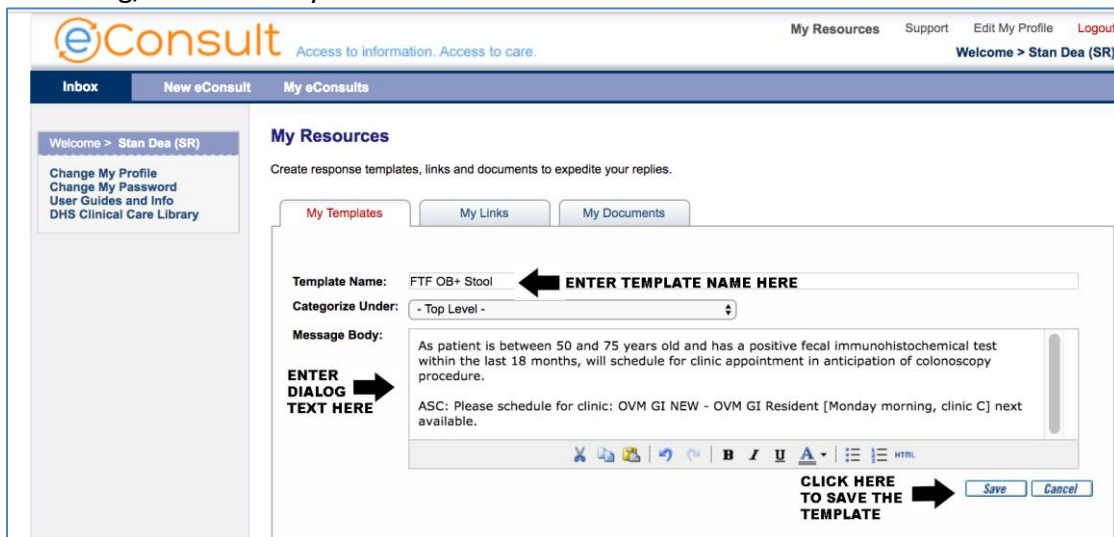
1. Click on “My Resources” at the top of the window.



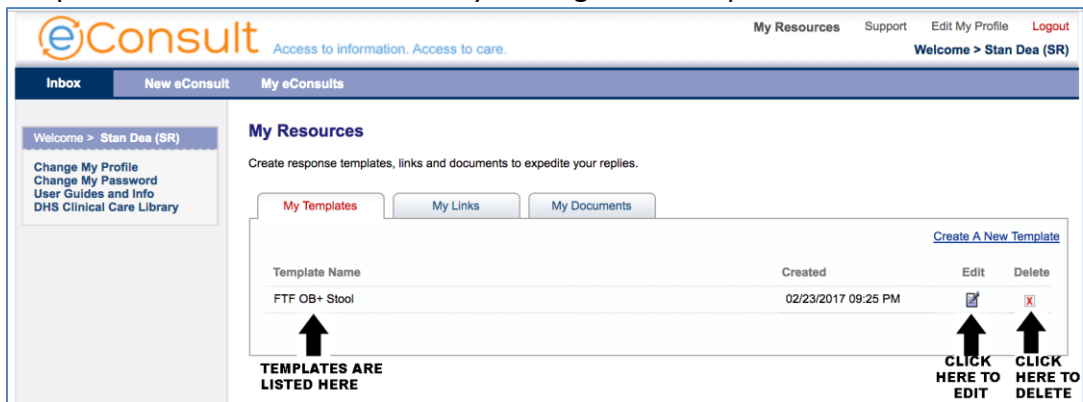
2. The default tab is directed to the “My Templates”. Click on “Create A New Template”.



3. Choose a name for your template and enter it in the “Template Name” box. Then enter the dialog/information you would like stored. Click the “Save” button when done.



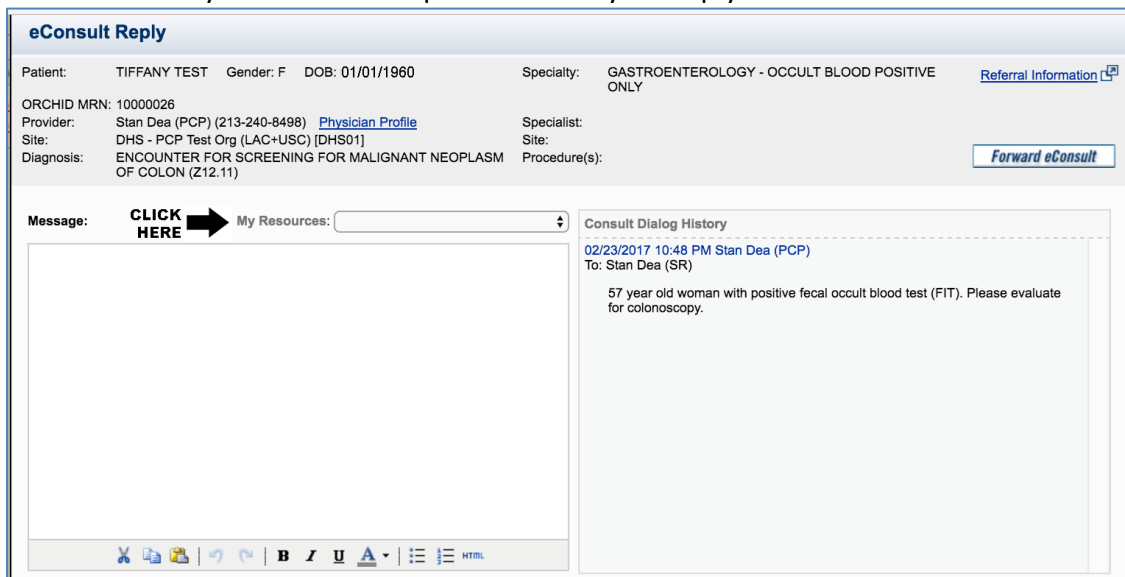
4. The Template menu will be displayed where the list of templates created are located. The template can be edited or deleted by clicking on the respective buttons.



USING TEMPLATES (as an SR)

As a specialty reviewer, templates can be useful in responding to eConsults submitted by PCPs. They are particularly useful if there are set responses to common eConsult problems submitted for review. To locate templates, links and documents:

1. Click on the “My Resources” dropdown box in your reply window.



2. Choose the desired template

Patient:	TIFFANY TEST	Gender: F	DOB: 01/01/1960	Specialty:	GASTROENTEROLOGY - OCCULT BLOOD POSITIVE ONLY	Referral Information
ORCHID MRN:	10000026					
Provider:	Stan Dea (PCP) (213-240-8498) Physician Profile					
Site:	DHS - PCP Test Org (LAC+USC) [DHS01]					
Diagnosis:	ENCOUNTER FOR SCREENING FOR MALIGNANT NEOPLASM OF COLON (Z12.11)			Procedure(s):		
Forward eConsult						

Message:

My Resource ✓
CLICK THE DESIRED TEMPLATE →

- My Templates
- FTF OB+ Stool
- My Links
- My Documents

Consult Dialog History

02/23/2017 10:48 PM Stan Dea (PCP)
To: Stan Dea (SR)

57 year old woman with positive fecal occult blood test (FIT). Please evaluate for colonoscopy.

Attachment(s): [Add Attachment](#)

My Organization DHS - Specialist Test Org (LAC+USC)

Close eConsult: - If Closing, Choose a Reason -

3. The dialog box will be filled automatically with one click.

eConsult Reply			
Patient:	TIFFANY TEST	Gender: F	DOB: 01/01/1970
			Specialty: GASTROENTEROLOGY - OCCULT BLOOD POSITIVE ONLY
ORCHID MRN:	10000026		
Provider:	Stan Dea (PCP) (213-240-8498)	Physician Profile	Specialist:
Site:	DHS - PCP Test Org (LAC+USC) [DHS01]		Site:
Diagnosis:	ENCOUNTER FOR SCREENING FOR MALIGNANT NEOPLASM OF COLON (Z12.11)		Procedure(s):
			Referral Information
			Forward eConsult

Message:		My Resources:	FTF OB+ Stool
<p>As patient is between 50 and 75 years old and has a positive fecal immunohistochemical test within the last 18 months, will schedule for clinic appointment in anticipation of colonoscopy procedure.</p> <p>ASC: Please schedule for clinic: OVM GI NEW - OVM GI Resident [Monday morning, clinic C] next available.</p>			

Consult Dialog History
<p>02/23/2017 10:48 PM Stan Dea (PCP) To: Stan Dea (SR)</p> <p>57 year old woman with positive fecal occult blood test (FIT). Please evaluate for colonoscopy.</p>

<p>Attachment(s): Add Attachment</p>	<p>- Select to Request a Form -</p>
<p>My Organization: DHS - Specialist Test Org (LAC+USC)</p>	<p>Requested Forms:</p>

USING TEMPLATES (PCP)

PCPs can also benefit from templates. Templates can be used for common eConsult problems, e.g., fecal occult blood positive. See the example below for how to use a template in submitting an eConsult.

1. Click the dropdown box in the “My Clinical Question” tab to select a template.

The screenshot shows the eConsult web interface. At the top, there's a header with the eConsult logo and navigation links: My Resources, Support, Edit My Profile, and Logout. Below the header, there's a navigation bar with tabs: Inbox, New eConsult, and My eConsults. The main content area is titled 'Consult Request' and includes a 'Specialty' dropdown menu set to 'GASTROENTEROLOGY - Occult Blood Positive Only'. There are several tabs: Clarifying Questions, Begin Consult, Consult Detail, My Clinical Question (which is active), Attachments/Notes, and Summary. A red status bar at the top right says 'eConsult Updated'. Below the tabs, there's a patient information section with fields for Patient Name (TIFFANY TEST), Gender (F), Date Of Birth (01/01/1960), MRUN (ORCHID MRN: 10000026), Member ID, and Cluster (LAC+USC). A 'Specialist Reviewer' dropdown is set to 'Next Available'. Below this, there's a text area for the 'Clinical question for specialist reviewer:'. To the right of this text area, there's a dropdown menu labeled '- Prefill From Template -' with an arrow pointing to it from the text 'CLICK HERE TO CHOOSE A TEMPLATE'. At the bottom of the form, there are 'Cancel' and 'Next' buttons.

Like in the SR example above, the dialog box will be automatically filled with the template text with one click.