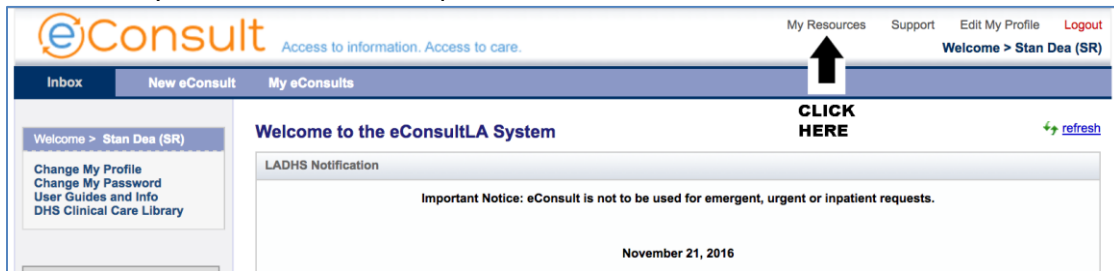# JOB AID – CREATING AND USING TEMPLATES
FEB 2017

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.
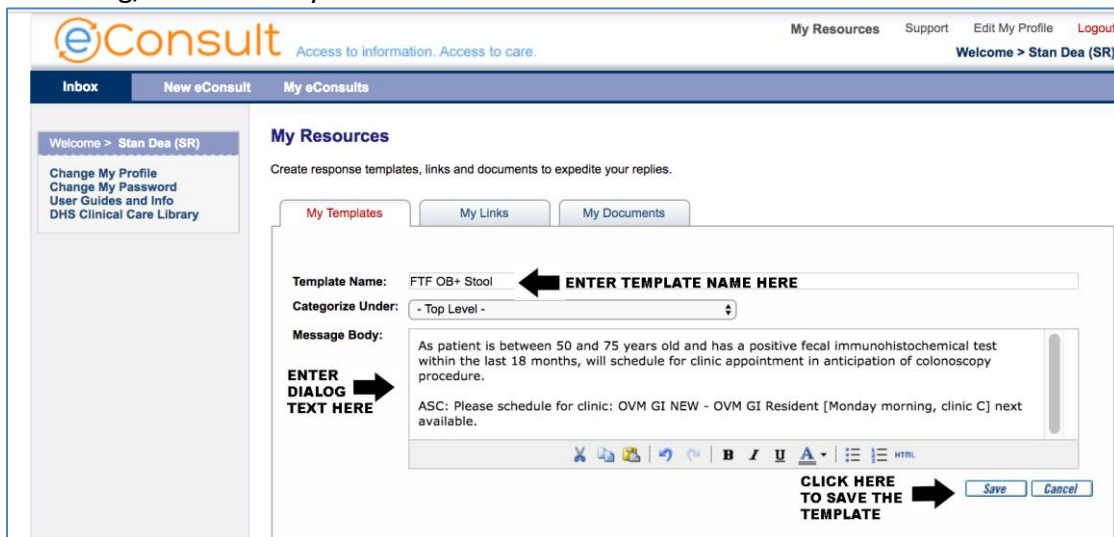
CREATING A TEMPLATE

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".
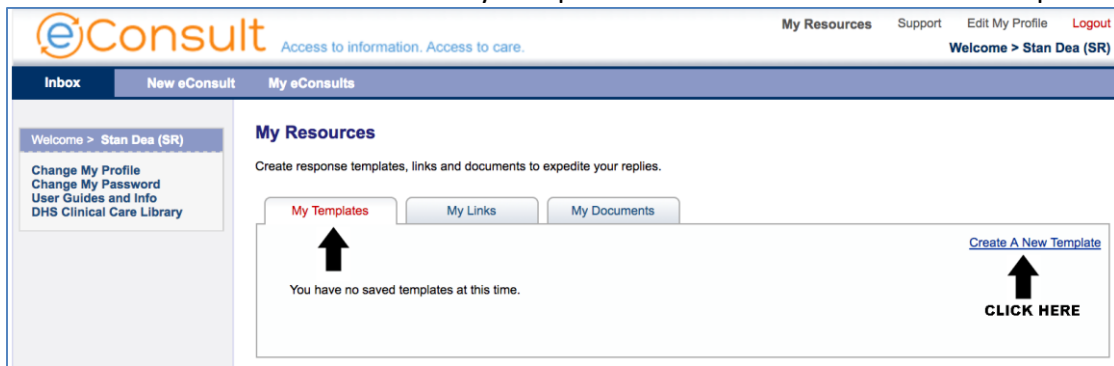
3. Choose a name for your template and enter it in the "Template Name" box. Then enter the dialog/information you would like stored. Click the "Save" button when done.
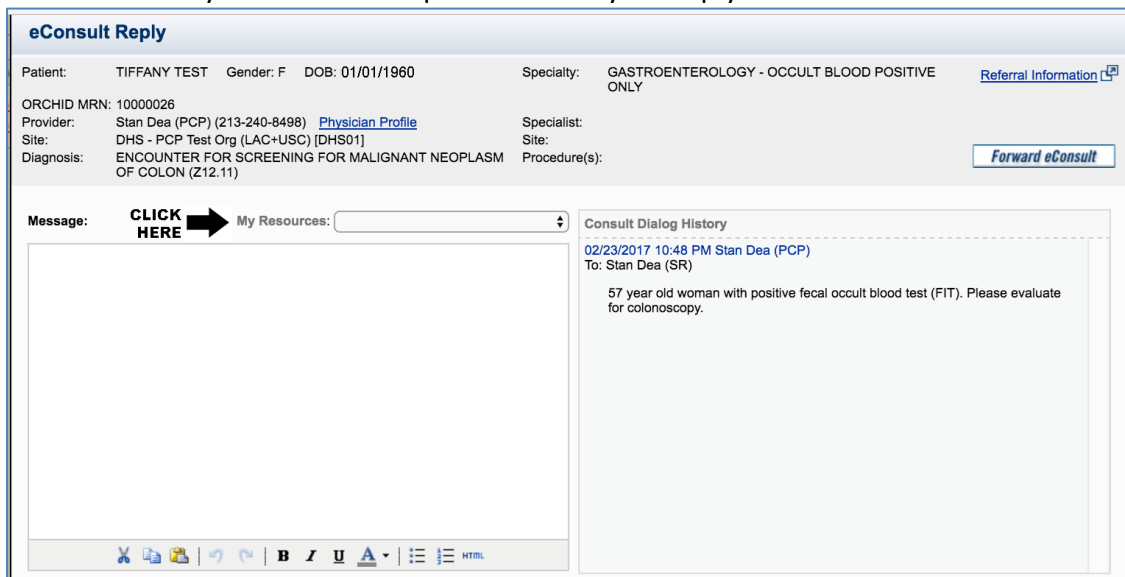
4. The Template menu will be displayed where the list of templates created are located. The template can be edited or deleted by clicking on the respective buttons.
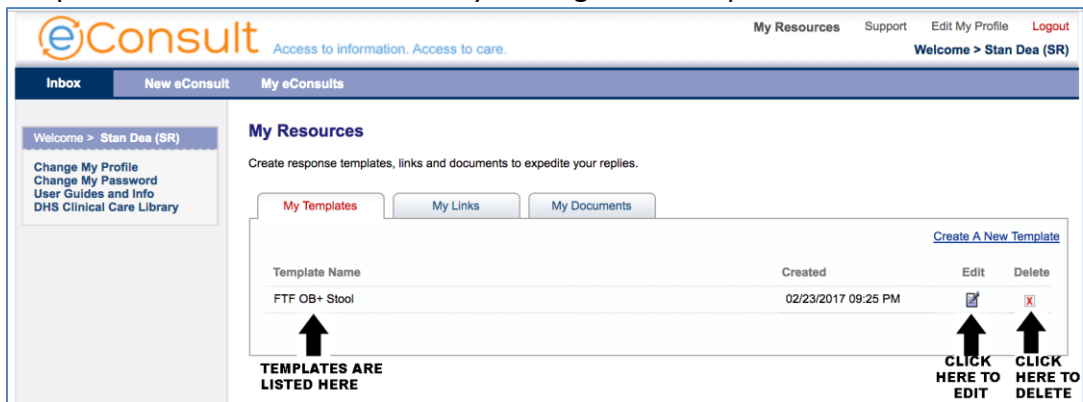
USING TEMPLATES (as an SR)

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

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

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.

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