

# Linking Resources to Templates

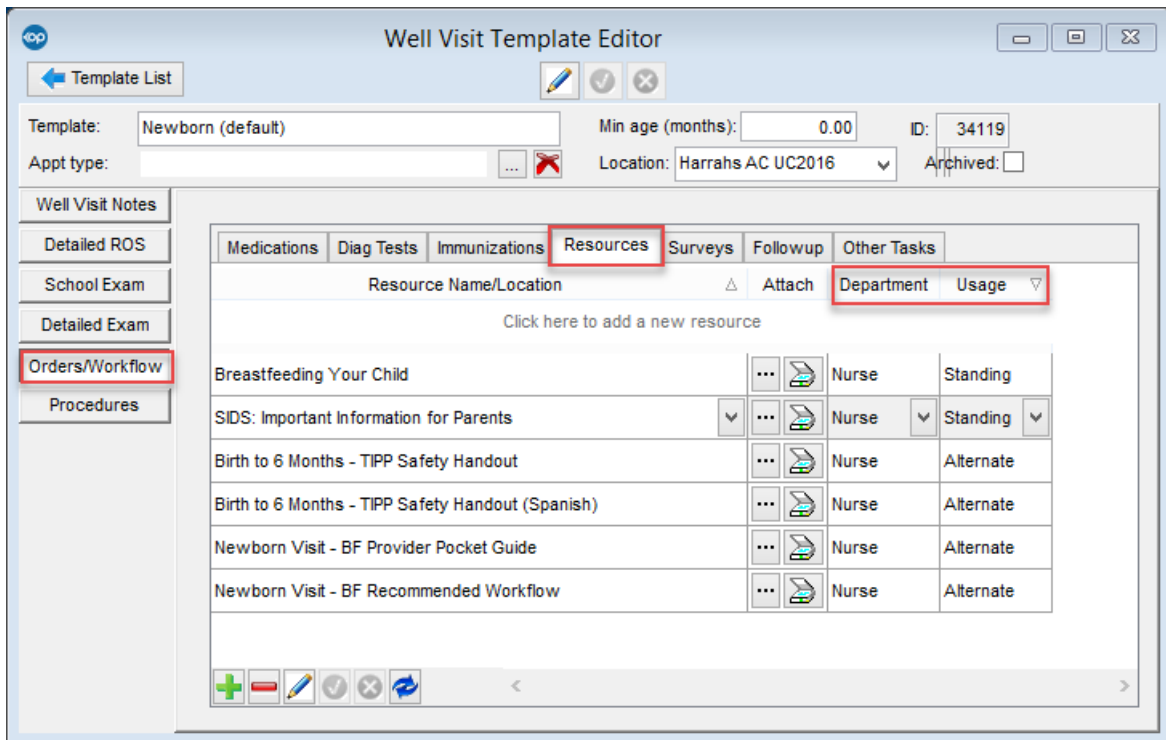
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**Note:** This information assumes that you have already added the resources to your AAP/Local Content Library. If you have not, [click here](#) for information.

## Linking Resources to Templates


1. Access the Encounter Templates: **Clinical tab > Well Visit Templates.**
2. Find and select the template that you wish to add a resource to and click the **Edit** button.
3. Click the **Orders/Workflow** tab.
4. Click the **Resources** tab.
5. Click where it says "**Click here to add a new resource.**"
6. Select the handout you want to attach from the drop-down menu or refer to the table below for other attaching options
7. Complete the **Department** and **Usage** fields, using the drop-down menus if needed.



### Attaching Options

	The <b>drop-down arrow</b> takes you to a list of articles added to the AAP/Local Content Library.
	The <b>ellipsis</b> button takes you to your computer to attach a handout.
	The <b>scanner</b> button opens the Document Selector window (this is where scanned paper handouts are saved).


**Note:** If using the Patient Portal, select **Patient** as the Department and **Standing** as the usage.

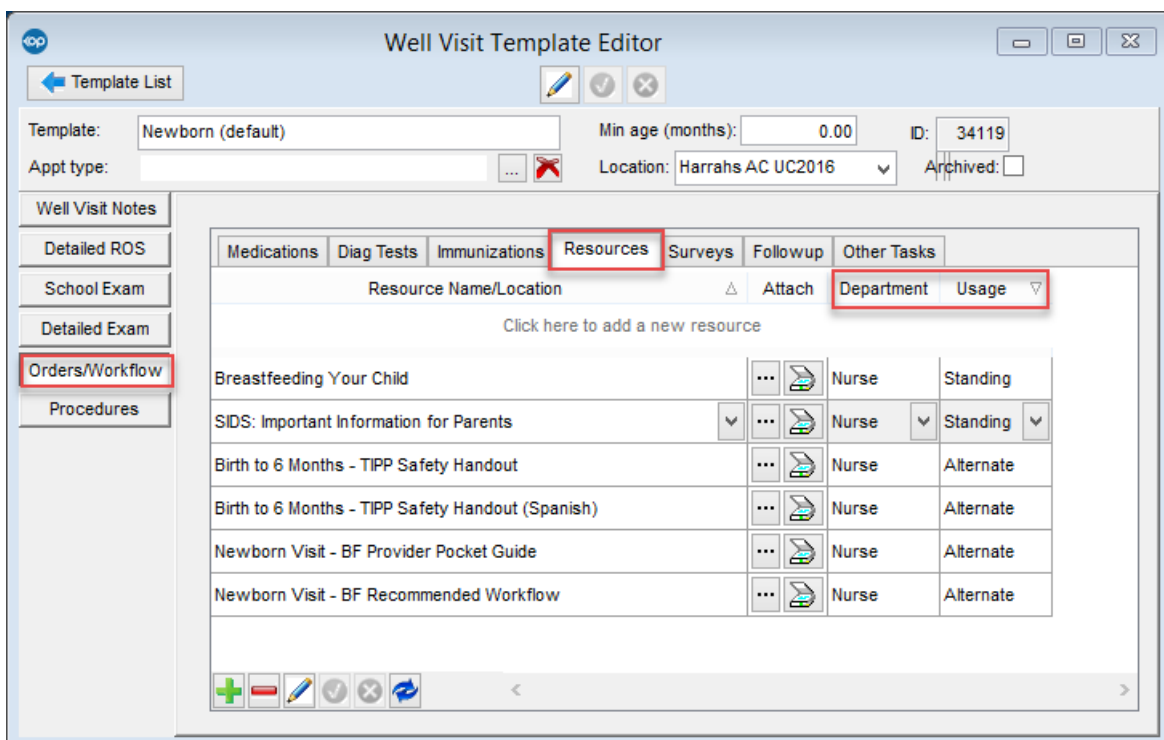
8. Click the **Save** button  .
9. Repeat Steps 5-8 to add additional handouts.



This information assumes that you have already added the resources to your AAP/Local Content Library. If you have not, [click here](#) for information.




## Linking Resources to Templates

1. Access the Encounter Templates by clicking **Utilities > Manage Clinical Features > Encounter Template Editor** or **Well Visit Template Editor**.
2. Find the template that you wish to add a resource to and click .
3. Click the **Orders/Workflow** tab.
4. Click the **Resources** tab.
5. Click where it says "**Click here to add another resource**"
6. Select the handout you want to attach from the drop down box.
7. Complete the **Department** and **Usage** drop down menus.



The screenshot shows the 'Well Visit Template Editor' window. The 'Resources' tab is active, displaying a table of resources. The 'Orders/Workflow' tab is selected in the left sidebar. The table has columns for 'Resource Name/Location', 'Attach', 'Department', and 'Usage'. A red box highlights the 'Resources' tab, and another red box highlights the 'Department' and 'Usage' columns. A red box also highlights the 'Orders/Workflow' tab in the sidebar.

Resource Name/Location	Attach	Department	Usage
Breastfeeding Your Child	...	Nurse	Standing
SIDS: Important Information for Parents	...	Nurse	Standing
Birth to 6 Months - TIPP Safety Handout	...	Nurse	Alternate
Birth to 6 Months - TIPP Safety Handout (Spanish)	...	Nurse	Alternate
Newborn Visit - BF Provider Pocket Guide	...	Nurse	Alternate
Newborn Visit - BF Recommended Workflow	...	Nurse	Alternate

Button	Description
	The drop down arrow takes you to a list of articles added to the AAP/Local Content Library.
	The ellipsis button takes you to your computer to attach a handout.
	The scanner button opens the Document Selector window (this is where scanned paper handouts are saved).




If using a **Patient Portal**:

- **Department:** Patient
- **Usage:** Standing

8. Click the  to save this file.

## Adding More than One Handout to a Template

1. After adding your first resource to a template, click where it says **Click here to add another resource**
  2. Choose a **Resource Name, Department, and Usage**.
  3. Click the  to save, and add additional as needed.
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