Customizing Shared Templates

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Customizing Templates For Your Practice

It is important that you customize each template that you download and import into OP. Shared templates have been created and customized by their owners for the unique practice environment (such as staff and resources) and workflows at that practice. The environment and worfklows of your practice likely differ from that of the creator of the template. This article discusses the most critical changes you need to make after importing shared templates. However, it is your responsibility to check all of the settings in shared and imported templates and to customize them as necessary to meet the unique needs of your practice.

> **Tip:** OP strongly recommends that each practice that imports shared templates customize those templates before using them in their daily workflows. Failure to do so may result in incorrect data that may be very difficult to correct. **OP is not obligated to fix your templates or your data if you import or share templates and damage either your templates or data in the process.**

If you have not yet downloaded and imported shared templates, refer to the details and instructions on the Export and Import functionality in OP that matches your OP environment (Client Server or Cloud)::

- **Import or Export Templates (Client Server)**
- **Import or Export Templates (Cloud)**

Removing and Adding Resources from the Imported Template

Shared templates that you import into OP may have Resources assigned in the template that you do not have at your Practice. To remove those resources from imported templates:

1. After importing the templates, in OP go to:**Clinical / Encounter Templates.**
2. Locate the template you want to customize. You can expand the**Systems** categories by clicking**+** or use the **Search** field or **Location** radio buttons.
3. Double click the selected template. OP then displays the **Encounter Template Editor** window.
4. Click on the **Orders/Workflow** tab.
5. Click on the **Resources** tab.
6. Click the **Edit** button at the bottom of the window.
7. Select the resource.
8. Click the **Delete** button (trash can icon) at the bottom of the window.
9. Delete each resource in the template that you do not have at your practice.
10. Add resources as necessary by clicking the**+** button and adding details for the resource.
11. Click the **Post Edit** button at the bottom of the window to save the changes.

Troubleshooting

Differentiating Between Identically-Named Templates

Sometimes an imported template has an identical Template Name to an existing template. If the names of two or more

templates are identical, they can be difficult to differentiate. However, each template has a unique ID number, called the Note ID. You can see the Note ID by ticking this column in the Encounter Template Editor "hamburger."

Assigning Templates to Yourself

Also, when you import a template in the Cloud environment, OP sets the template owner (the Author/By field) to $FX. Only template owners can edit templates. Therefore, you should first assign ownership of that template to yourself.

1. With the template open, click the pencil (Edit) button at the top of the window to make changes.
2. In the Author field, click Clear, then choose yourself.
3. Click the checkbox (Accept) button at the top of the window to save ownership.