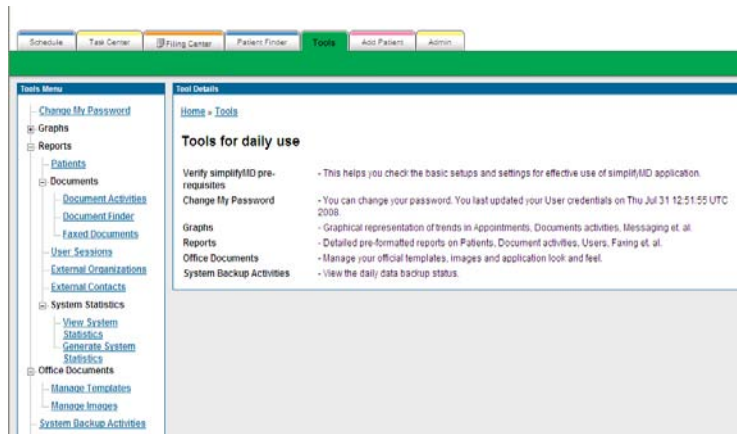
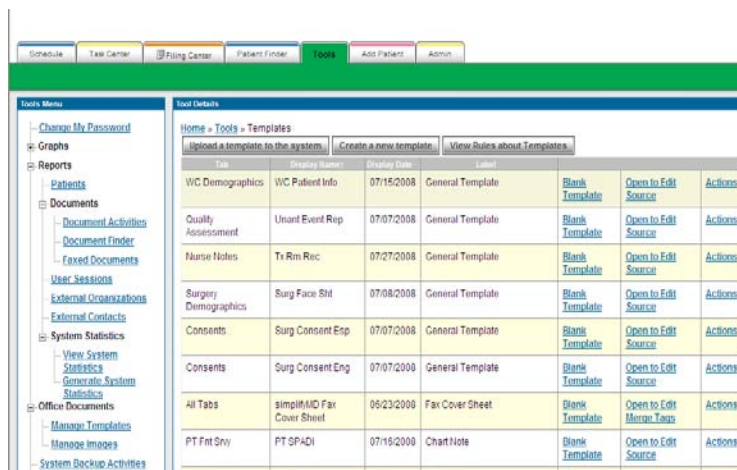


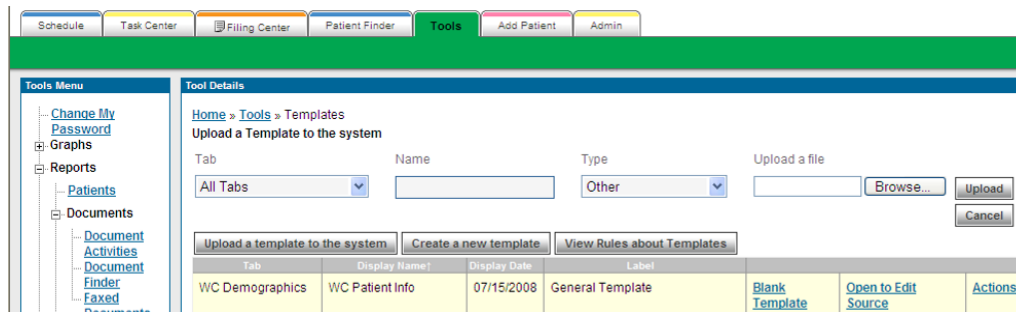
Tools Tab: Up-loading , Actions and Quick Edits to Templates and Forms



- Click on the Tools Tab
- Click on Manage Templates



- Click on Upload a Template to the System



- Select the Tab
- Enter the Document Name (Keep the name as brief as possible and do not use any symbols in your naming configuration. i.e. & * % # or@.)

- Select Chart Note from the Type Dropdown
- Click Browse and locate the document to upload, Click Upload.
- You will see a Uploaded Successfully Message if you followed all the steps correctly.

Select Actions to move, to edit the name, to set restrictions, or to delete a template...

Select the Template to edit..

Click on Actions

Tab	Display Name	Created Date	Label	Blank Template	Open to Edit Source	Actions
Orders and Consents	SIUoes Sht Stay	05/05/2009	Chart Note	Blank Template	Open to Edit Source	Actions
Orders and Consents	SIUoes Pat Proc Info	05/05/2009	Chart Note	Blank Template	Open to Edit Source	Actions
Orders and Consents	SIUoes Central Sched	05/05/2009	Chart Note	Blank Template	Open to Edit Source	Actions
Orders and Consents	St Joes Surg Csrnt	05/05/2009	Chart Note	Blank Template	Open to Edit Source	Actions
All Tabs	simplifMD Fax Cover Sheet	10/11/2008	Fax Cover Sheet	Blank Template	Open to Edit Merge Tags	Actions
All Tabs	Signature Watermark	02/03/2009	Watermark	Blank Template	View Merge Tags	Actions
Crsprnc	Shashl Crsprnc Letter	05/11/2009	Chart Note	Blank Template	Open to Edit Source	Actions
PI Info	Sample Verfy Ins Benefits	03/02/2009	Chart Note	Blank Template	Open to Edit Source	Actions
PI Info	Sample Firecot	03/02/2009	Chart Note	Blank Template	Open to Edit Source	Actions
All Tabs	Ruben Luke Garcia Fax	04/16/2009	Fax Cover Sheet	Blank Template	Open to Edit Merge Tags	Actions
PI Info	RLG WS Excuse	05/05/2009	Chart Note	Blank Template	Open to Edit Source	Actions
RX	RLG RX	04/27/2009	Chart Note	Blank Template	Open to Edit Source	Actions

Click to Edit the Date, Edit the Name, Apply a Label, i.e. Check In or Check Out, Or Click the Dropdown Arrow to Move the Template to another Tab.



Click on Apply Restrictions:

Apply Restrictions

To apply User Restrictions

Select the User or Users that should be able to View, Edit and Delete the Form...

Select the Check Boxes

To apply User Group Restrictions

Select the User Group that Should Be able to View, Edit and Delete the Form...

Select the Check Boxes

Click Close

To manage quick edits to an existing Form, follow these steps.

1. Click on the Template
2. Click Open to Edit Source
3. Save the Template down on your Desktop...
 - a. Make the "Quick and Easy" edits, i.e., correct spelling, edit some simple formatting so that the document does not extend to a second page unnecessarily, etc.
4. Follow the Above directions to Upload a Template to the System....

View Rules about Templates displays the Merge Tags.

Some of the Rules, i.e. Barcode Snippets are used within the application and are used in creation of HTML Templates..

- Create New Template is an HTML Template and is in the application as a Forms Creator as a benefit for the practice that wishes to use them.
- WORD TEMPLATES/Forms: Upload a rtf. Rich text format, document file type for a Form to printed and scanned back into sMD. Rtf's can be inked on as well.
- Create Templates/Forms as a docx file Word 2007 Document for Inking with a Tablet.
- Templates that are constructed for Filling in Forms, check boxes, etc. must be Locked by Using the Developer Tools in Word 2007.
- Templates and forms that are created for Typing, must have static lines created so that they can be typed on.