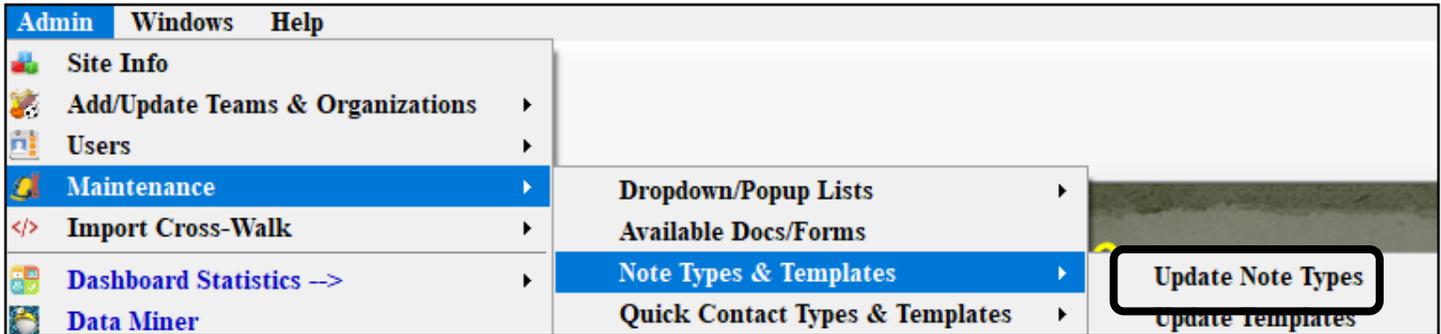


# ATS— How to Create a Note Template

ATS allows you to customize and build note types and templates that can provide consistent and efficient data entry. They can also be utilized to log specific information. You are able to insert Key Phrases, or Field Tags into a template to aid in quick data entry.

To customize your note Types and Templates, begin by going to ADMIN—> Maintenance—> Note Types & Templates —> Update Note Types



This will open up the box shown below. Decide what the name of your note type will be and type it in the available blank space at the top of the list. Be sure to give your note an abbreviation and sort number, as well as marking it active. Click save when you are finished.

The screenshot shows the 'Popup Area Maintenance' window. A table lists various note types with columns for Description, Abbrev, Sort, Active, and Last Used. A callout box points to the 'Description' column, and another callout box provides a link to a help document.

Description	Abbrev	Sort	Active	Last Used
COVID-19 Staff Close Contact Letter	StaffCCL	0	<input checked="" type="checkbox"/>	
COVID-19 Staff Criteria Met	StaffCM	0	<input checked="" type="checkbox"/>	
COVID-19 Staff Criteria Met Reminder	StaffCMR	0	<input checked="" type="checkbox"/>	
COVID-19 Staff Positive Letter	StaffPTL	0	<input checked="" type="checkbox"/>	
COVID-19 Student Close Contact Exposure	CC19CCE	0	<input checked="" type="checkbox"/>	
COVID-19 Student Positive Letter	StudentPTL	0	<input checked="" type="checkbox"/>	
COVID-19 Student Return To School Met	RTS	0	<input checked="" type="checkbox"/>	
COVID-19 Student Return To School Met Remin...	RTSR	0	<input checked="" type="checkbox"/>	
Daily Note	Daily	0	<input checked="" type="checkbox"/>	
Discharge Summary	Discharge	0	<input checked="" type="checkbox"/>	
Observation	Observe	0	<input checked="" type="checkbox"/>	
Ortho Evaluation	Ortho	0	<input checked="" type="checkbox"/>	
Palpation	Palp	0	<input checked="" type="checkbox"/>	
Physician Visit	PV	0	<input checked="" type="checkbox"/>	
Plan	Plan	0	<input checked="" type="checkbox"/>	
Popup Template Test	PTT	0	<input checked="" type="checkbox"/>	
Presentation	Pres	0	<input checked="" type="checkbox"/>	
Range Of Motion	ROM	0	<input checked="" type="checkbox"/>	
Referral	Referral	0	<input checked="" type="checkbox"/>	
Rehabilitation Goals	Goals	0	<input checked="" type="checkbox"/>	
SOAP Note	SOAP	0	<input checked="" type="checkbox"/>	
Special Tests	Special	0	<input checked="" type="checkbox"/>	
Update Note	Update	0	<input checked="" type="checkbox"/>	

Record: 1 Of 24

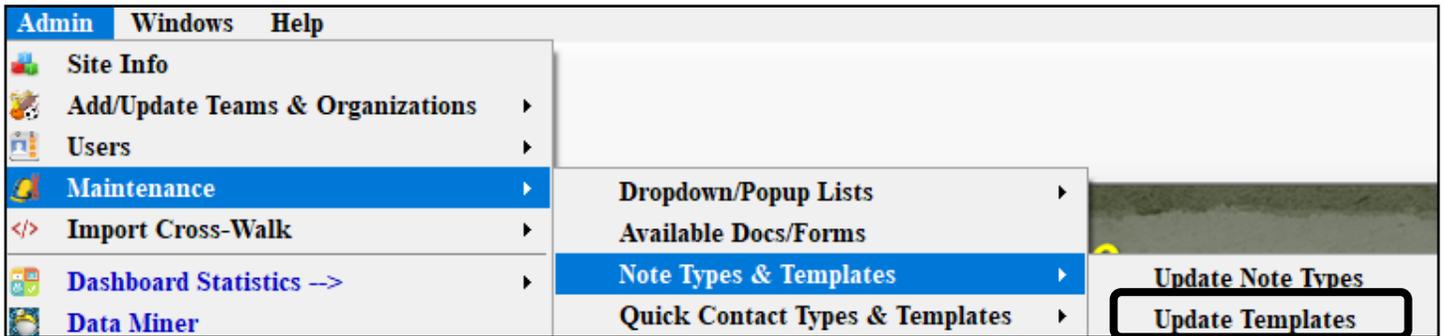
**DO NOT use single or double quotes in your "Description" or "Abbrev" areas. This may lead to issues in reports and making choices.**

Buttons: Copy, Save, Print, To Excel, Close

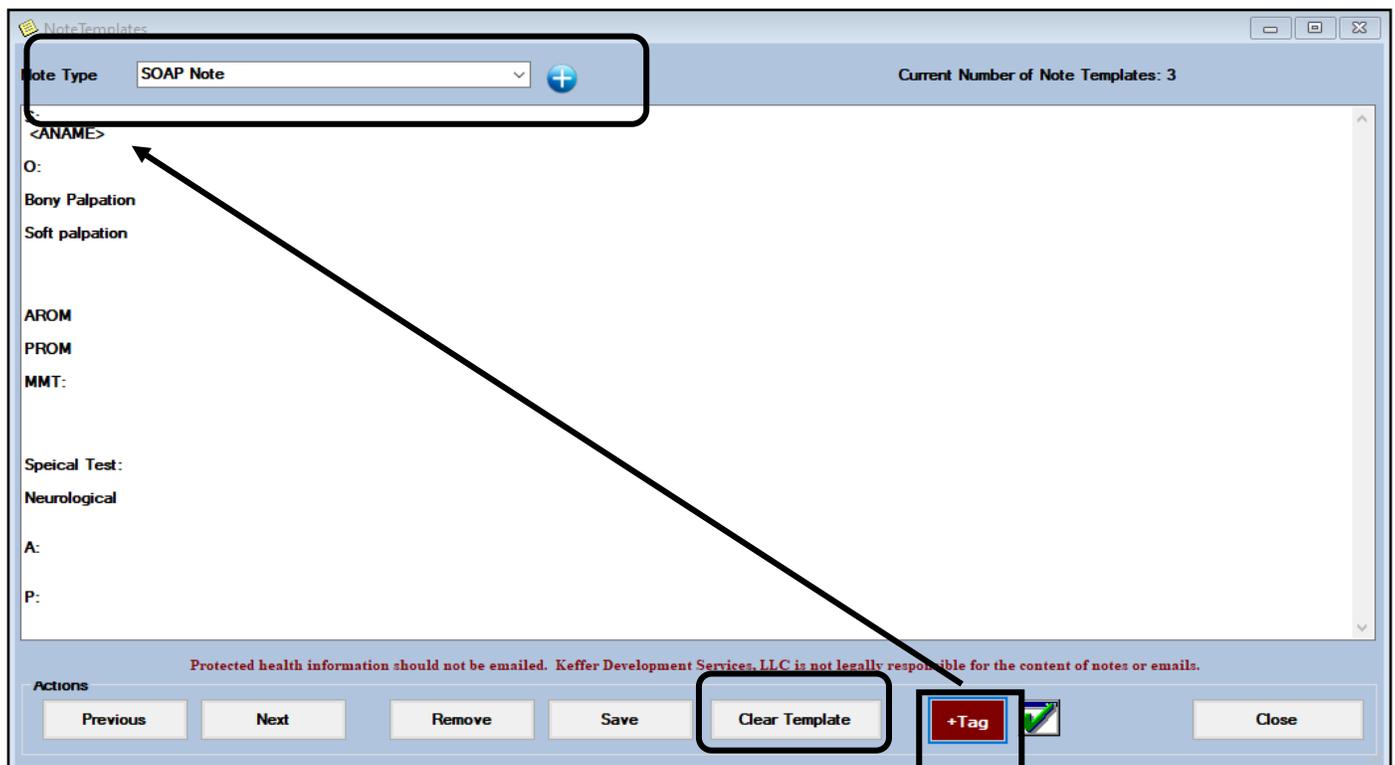
# ATS— How to Create a Note Template

Once you have saved your new note type you will now create your template for this note type.

To begin go to ADMIN—> Maintenance—>Note Types& Templates—>Update Templates.



Select the note type you want to edit from the list. You are then able to create the Template that shows up anytime that note type is selected from the dropdown list. This can be simple, or can be complex, detailing out your evaluation.

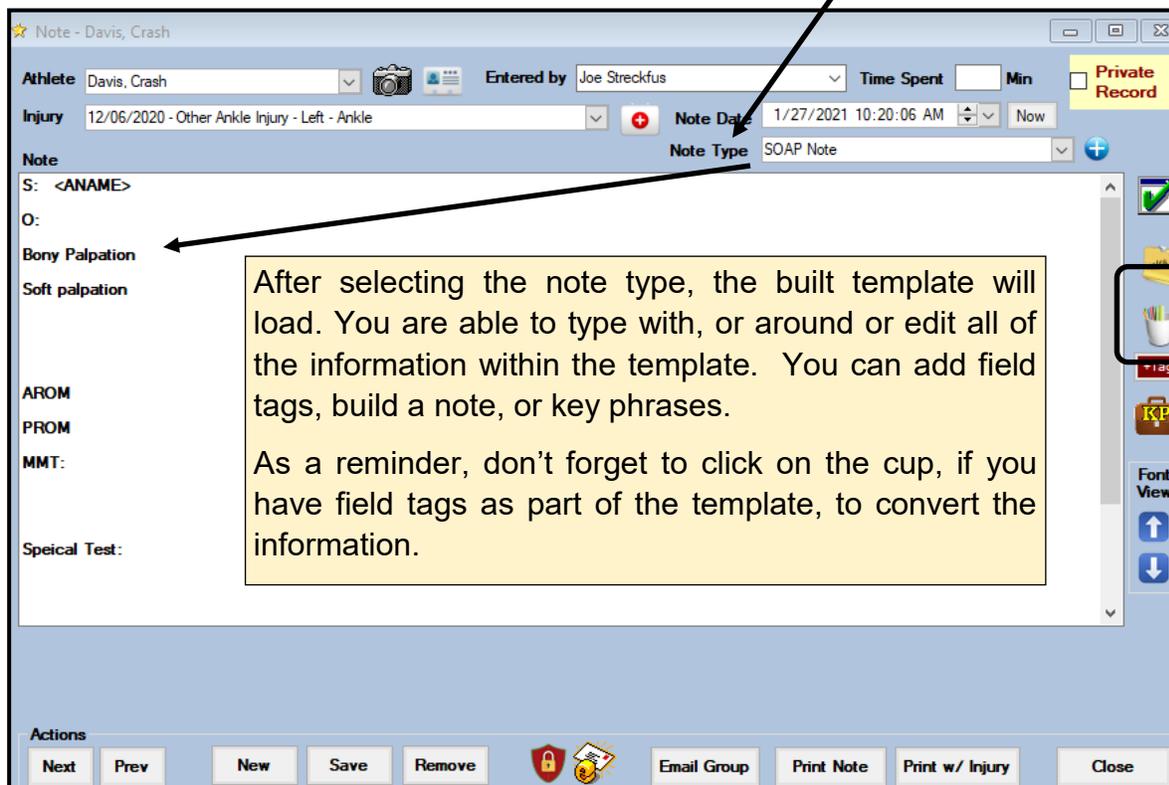
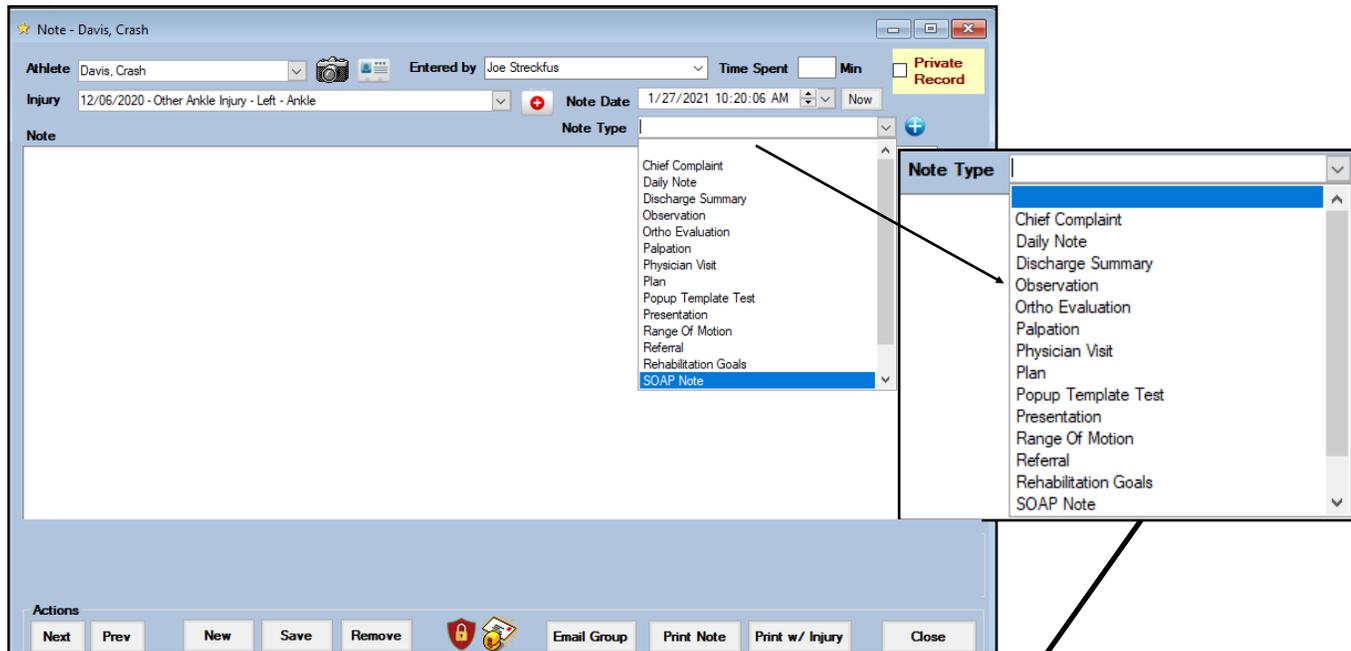


You can clear the template by clicking the Clear Template button. You can also utilize Field Tags and Key Phrases within your note template. Use the links to learn more about [Field Tags](#), or [Key Phrases](#). Type in the KP or Custom Field Tag, or use the Tag button to insert field tags.

As always, save your information after editing.

# ATS— How to Create a Note Template

This template will now come up any time this note type is selected for use during documentation.



# ATS— How to Create a Note Template

You have the added ability to send a note notification after it is completed. Specific to the COVID situation, and notification of emergency contacts, and basic contact tracing. This is not limited to COVID though, this can send any note, or template that you define, to the emergency contact, if you choose. This will be sent with the regular batch notifications (early AM). You are also able to force send it with the Email Now button. Doing that you will see the Email Sent becomes filled in with the date and time. This will also be logged in the E-files tab of the athlete profile.

Emergency Contact Nightly Email Batch... Email Sent:  
Name:  Contact With:   Email To Group Also   
Protected health information should not be emailed. Keffer Development Services, LLC is not legally responsible for the content of notes or emails.

Actions  
Next Prev New Save Remove Email Group Print Note Print w/ Injury Close

To utilize with COVID notification, please create a note template, specific to your institution, to standardize your notification.

**\*\*\*\*KDS/ATS takes no legal responsibility for the dissemination of protected health information. Seek guidance from legal council, prior to communicating or emailing PHI.\*\*\*\***

To enable the Note send (batch) function, go to ADMIN—>Users—>Search Users—> decide your preferred way of searching. This is USER specific, only grant access to those you would like to be able to edit, or make these changes. Or send PHI in an open email.

Information  
Name: Joe Streckfus  
Roles:  Administrator  Athletic Trainer  PRN Staff  
 Coach  Doc/Phy/Nurse  Other  
 Student  Strength/Condition  
User ID: Joe Streckfus Password: \*\*\*\*\*  
Disabled On: / / Reset  
Supervisor:   
Email Addr: joe@kefferdevelopment.com  
Text Addr:   
Title:   
License #:   
 See/set private info  Force password change on next login  
 Use secure messages

Security  
Teams Modules Email Groups Email/Opt Partial Admin Secure Msg Notes MSC Forms  
 No Report Access  Allowed to Submit/Print Claims  Group Emails Allowed  
 Allow Report Printing  Allow Report Exporting  
 User can See All Injuries on the Athlete Details Screen  Note Batch Allowed

Module	Access
Announcements	Read-Write
Athlete Forms	Read-Write
Athlete Screen	Read-Write
Athlete Screening	Read-Write
Concussion	Read-Write
Distribute Medication	Read-Write
Documents	Read-Write
Emergency Contacts	Read-Write
Evaluations	Read-Write
Evaluations - Additional Findings	Read-Write
Evaluations - Evaluations	Read-Write
Evaluations - Girth	Read-Write
Evaluations - Medical History	Read-Write
Evaluations - Objective	Read-Write
Evaluations - Pain	Read-Write
Evaluations - Physician Notes	Read-Write
Evaluations - Special Tests	Read-Write
Functional Movement Evaluations	Read-Write

Record: 1 Of 75  
Read/Write Read Only Add Only None From Another User Reset

Actions  
Search Reset Disable New Remove Save Close