

**Blueberry Harbor Software, Inc.**  
***Put Time and Energy Back In Your Day!***  
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### **Templates**

An e-article for clinicians by  
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I would like to take up the idea of templates. A template is nothing more than a file you can copy that structures what you type into categories. In most software programs fields are the name given to a similar function. You tab between the fields to enter the information for each field. While this keeps everything separate, it keeps everything separate which isn't so helpful for clinicians. Templates in some software on the other hand are documents. They can be changed to reflect your working practices. If you want particular information in your records repetitively at a particular spot a template is the fastest and easiest way to achieve that. Fields require a computer programmer to alter your software. You can alter and edit templates yourself. In addition templates can be strategically placed in your software program so you know where to look for certain information. You would know, for example, to look for a person's contact information in the contact files, not in the receipt files.

It is essential that programs for clinicians have some flexibility in the way that templates are constructed. That way a substance abuse counselor can make the template reflect the way he or she works. A Nurse specialist can tailor her templates to the standard she sets for her records. An initial evaluation template can be made that has the information he or she wants in it. A psychiatrist would look for certain information that an LCSW might not. If you knew where each template was kept you could access the information you needed and you would have some regularity of how it was structured when it went into the clinical chart. Few of us would look for the presenting issues to be at the end of the evaluation whereas diagnosis would be. You get the picture.

Templates in the Clinical Record Keeper Series of programs are simply word processing documents that are constructed in the language of the database engine that runs the program. They are editable, changeable, or completely remade like any word processing document can be. This powerful method of organizing data entry brings some order out of chaos and the myriad details of what we record. It means that you can organize a huge number of files in a structure that you understand, and can use. File management is fast and easy.

That is one of the nice things that computers and software can do for us. They can organize what we write into an entity we recognize.

If the organization of the entire program is one you understand you can work much faster and more accurately because you know where to go to get things done. It is great to have a program be simple enough to have a gestalt of the entire program. Many of us are quite visual, and spatial. If we can conceptualize a program visually it helps our grasp of the organization of things.

An initial evaluation template for example helps you not to forget something in the press of the moment. It can be as specific or as general as you want it to be.

Templates are also useful for recurring things such as a mental status exam. Wouldn't it be nice to have a template you could quickly bring into the clinical chart of a patient and then just go down the list and fill it in? It would keep you from having to remember everything about a mental status exam. You might not use it every time but just to have it available would be helpful.

Once you get templates set up to reflect the way you work you can sit back and simply use them. You know that information will be where it should be.

Then record keeping can get to be more automatic, kind of like driving on the superhighway. After you have done it for a while you can do it with confidence and it seems familiar. It takes less energy to do it that way. Guess where the energy goes? That's right, onto the transaction between you and the client where it should go or if you aren't using a computer when with a client, then the energy stays with you. So computers can really help you stay up with your record keeping, but not require much mental effort to do so. Now you know where I got the phrase "Put some time and energy back in your day!"

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