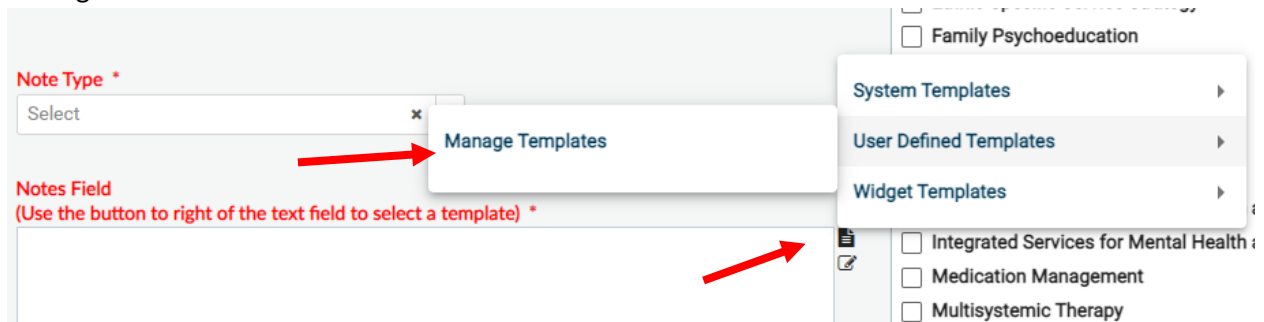


User Defined Template Tip Sheet

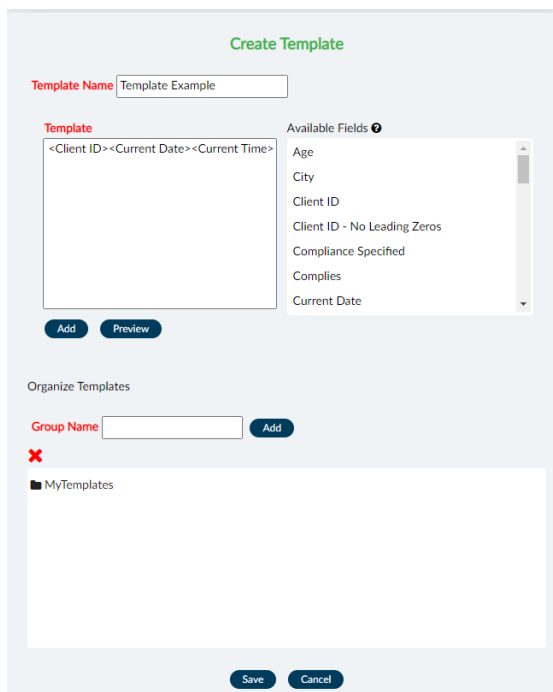
This Tip Sheet may change as our trainings and systems are updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at Avatar@saccounty.net.

User Defined Templates can be used in any text field in Avatar. Most commonly it is used in the Progress Note Entry form.

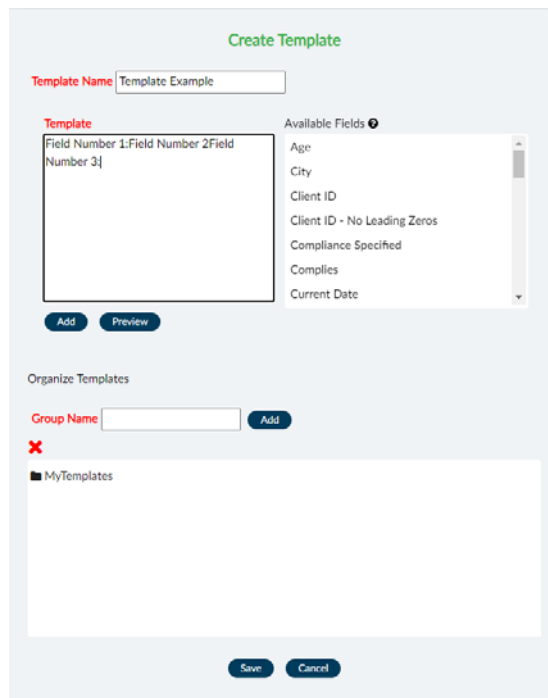
1. Click on the template icon to the right text box, hover over User Defined Template and click Manage.



2. Enter the Template Name
3. Enter the fields for the template. You can drag and drop fields from the box on the right-hand-side or you can manually enter in your template.

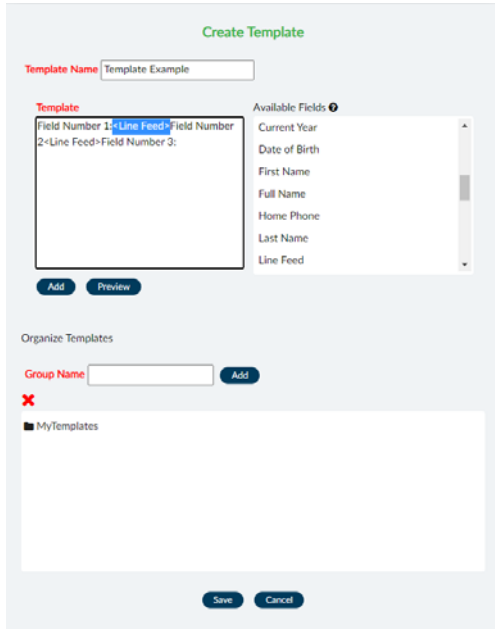


If you drag and drop each field, remove the spaces in-between each field.

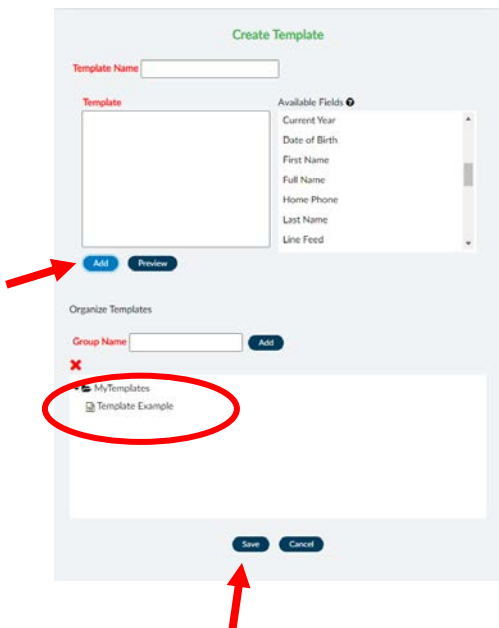


If you manually enter the fields, do not put spaces between each field.

- Whether you use the available fields on the right-hand-side or if you create your own template you will need to insert a Line Feed in-between each field. Line Feed is found in the Available Fields box on the right. The fields are listed in alpha order. Drag and drop the Line Feed in-between each field. Make sure to remove any spaces before and after the Line Feed. If there are any spaces between the Line Feed and the fields they will not line up properly.



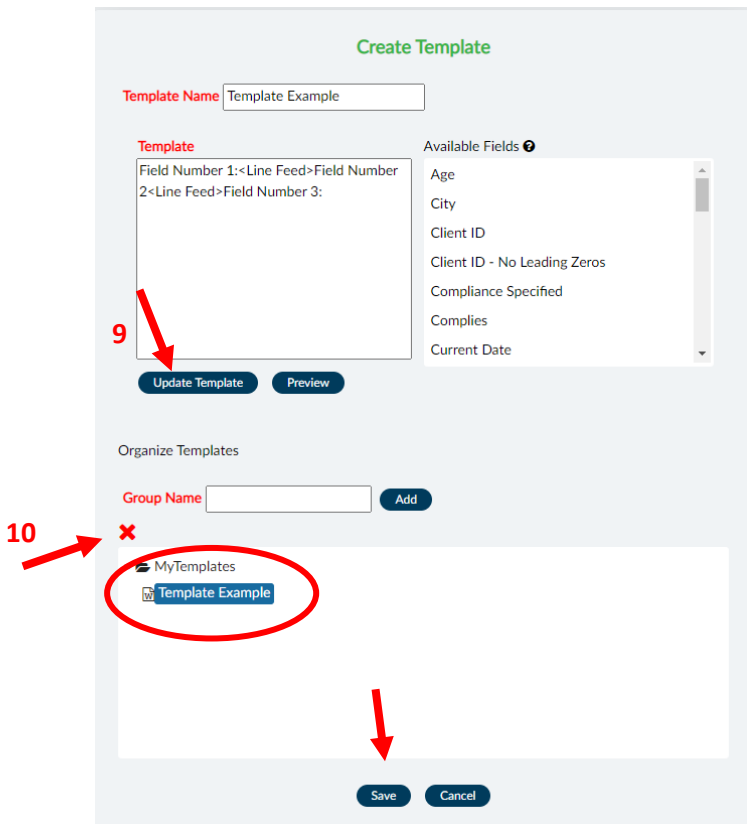
- Once you have completed your template click the Add button, this will drop the template into your MyTemplates. You are able to create Group Names for your templates, however this is not required. If there are no group names your templates will fall into the MyTemplates folder. Click Save.



- To access your template, right click on the text field and hover over User Defined Templates. The template(s) you created will show above the Manage button. Click on the template name to populate.



- Multiple templates can be made. If you need to add a new template, update an existing template, or delete a template you would click on the Manage button.
- To add a new template you will follow the same steps listed above.
- To update an existing template, click on the template you want to manage below and it will populate in the box above. You can add or remove fields or fix any spacing issues by removing all spaces in-between the Line Feed. Click Update Template and Save once you have completed.



- To remove a template, click on the template name in the box below and then click on the red x (circled in the screen shot below).