

Observation Note Template

Why it matters...

Functionality

- Enhanced note customization for **ALL** Note types
- Embedded tables
- Easy text emphasis and formatting
- Seamless in-text hyperlinks

Impact on Workflow

- Save time with preloaded templates
- Streamline documenting structured observations
- Prep conversation points in advance
- Elevate your documentation with custom formatting, tables, and hyperlinks

Template vs Custom Form

Deciding between creating/using a *Year End Summary Template* and a *Year End Summary Custom Form* depends on school needs. See specifications below in determining your selection.

Custom Form

- Enter each prompt in a unique box

Template

- Enter prompt information into one seamless form

Template Setup & Usage

Creation

STEP 1 - Only needs to be created **ONCE** and can be used with **ALL** Observation Templates.

- Create a [Custom Class Observation Note](#)
- Name the form *Observation Prompt*
- Insert only ONE Custom Field
- Name Prompt #1: Complete the following form for your observation.
- Click Save

STEP 2 - Completed for **EACH** *Observation Template* created

- Go to *Manage Note Template*
- Click on New Note Template
 - Enter *Title*
 - Select the *Note Type*
 - Enter *Template Body*
- Click on *Create Note Template* button

Implementation

- Select the *Observation note*
- Enter *Meeting Date*
- Select who you *Met with* from dropdown
- Select the *Observation Prompt Form* from the dropdown menu
- Select the template you wish to use from the *Templates* dropdown in the *Summary* textbox.
- Place cursor where you want to add text
- Save as Draft or Publish

Note: When writing the Note for another user enter their name first. .

Tips

- Created *Templates* will be grouped by Note Type and follow alphabetical sequence within each type. Numbering your templates will reorder the sequence within the Note Type, with the template numbered 1 at the top.
- When you create your *Template* make the text of the prompts bold and/or a different color to allow them to be easily distinguished from the text being entered by school members.

