Creating custom templates for client batch exports

If you wish to use a custom template instead of an AlayaCare standard template for documents in client batch exports, you can design what you want the final output to look like and indicate how data should map from the fields on the form to the fields in the template.

AlayaCare uses Docmosis as document generation software. To create a custom PDF template, you will need to follow correct Docmosis syntax for the different AlayaCare entities to ensure that data maps correctly from fields to the template fields during the document generation process. For a complete list of the data available to pull into and the syntax required to populate the information into the templates, please see the **Data available for custom clinical templates** section.

For the best results, AlayaCare recommends designing Docmosis templates using the open-source word processor LibreOffice.

Each document type has an AlayaCare standard template that will be used by default. To view or make changes to the AlayaCare standard template for one of these document categories, go to **Settings>Document Templates** and select **Download** for the template you wish to view.



## Building the template

1. To begin, click[here](https://www.libreoffice.org/download/download/) to download LibreOffice for free. If you prefer, you can also use Microsoft Word and create the templates in **.doc** or **.docx** format.
2. Review the official Docmosis template user guide, which can be found [[here.](https://resources.docmosis.com/content/documentation/tornado-v2-8-2-template-guide)](https://resources.docmosis.com/content/documentation/docmosis-java-v4-4-2-template-guide)
3. If you are starting with an existing PDF template, you will need to start by converting the file from **.pdf** to **.odt** format. To convert the file to **.odt**, use the use the [Convertico file converter](https://convertio.co/). Once you have converted the file, open it in LibreOffice. Make sure to review the converted file carefully as some issues can occur when converting between formats. Note that fillable PDFs tend to convert more seamlessly to **.odt** format.
4. Customize the design of your template using your preferred word processor. We recommend that you enter fake data in the template fields during the design phase to help you visualize what the final output will look like. Any images (such as a logo) or text that should always appear in the template can be added as part of the design.
5. After you have designed your template, you will need to map how data from AlayaCare will populate in the template fields. To do this, replace the fake data in your template with the correct Docmosis syntax for the corresponding AlayaCare field. To do this, find the attribute you are looking to populate from AlayaCare in the **Data available for custom clinical templates** section of this guide and insert the correct Docmosis element following the syntax listed in the **Docmosis element for template** column. For example, if you wanted to the **batch start date** to appear in a template field, you would need to insert **<batch\_info.start\_date>>** in the place in the template where the start date should appear.

Template field with fake data:



 Template field with Docmosis elements:

 

Keep in mind that the AlayaCare standard templates can be downloaded from the **Document Templates** tab under **Settings** and used as a reference when designing custom templates. You can also make changes to the standard templates, save them under a new name, and then upload the custom versions to avoid having to create a template entirely from scratch.

# Data available for custom clinical templates

Custom templates can be used for the following document types:

* **Care plan**
* **Cover page**
* **Daily summary**
* **Service task details**
* **Visit attachments**

Some information is available for all clinical template types. Other attributes are specific to certain template types.

## Common data available in ALL custom templates

**Batch information**

This information refers to the batch of documents generated in **Clients>Client Charts**.

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in the template** |
| Branch information | Information about the branch at which the batch was created. You have access to the following attributes:branch id name timezone\_name | Use the following syntax to pull this information into a custom template:Branch ID: **<<batch\_info.branch.id>>**Branch name: **<<batch\_info.branch.name>>**Branch time zone: **<<batch\_info.branch.timezone\_name>>** |
| Category name | category | **<<batch\_info.category>>** |
| Category ID | category\_id | **<<batch\_info.category\_id>>** |
| Batch name | name | **<<batch\_info.name>>** |
| Report list The sections, subsections, and fields that the user has chosen to include or exclude from the PDF documents generated as part of the batch. | Use these attributes to define which sections to show/hide in the template. report\_list cover\_page agency phone\_number fax\_number agency\_name address logo email\_address batch\_info start\_end\_date client phone\_number emergency\_contact\_phone\_numbers brn\_number name dob gender address alayacare\_id emergency\_contact\_names external\_id emergency\_contact\_relationships  date\_summary visit\_summary document\_summary visit\_attachments progress\_notes all  header\_footer client dob brn\_number external\_id name alayacare\_id employee full\_name job\_title email phone\_main  agency logo name  footer batch\_info\_id page\_number batch\_info\_creation\_date  care\_plan diagnoses care\_provider\_signature interventions allergies physician\_signature client\_signature agency\_information care\_plan\_information dme\_supplies risks goals client\_information assessments client\_services  client\_forms all service\_task\_details interventions goals visit\_information  | To pull any attribute from the **Data that can be pulled** column into a template, write **<<batch\_info.report\_list** followed by the section, subsection, and then specific field separated by a period. Use the hierarchy shown as a reference when writing the syntax for the data you wish to enter. Make sure to write the attribute exactly as shown. For example, for the phone number for the agency in the cover page section, write <<**batch\_info.report\_list.cover\_page.agency.phone\_number>>**For the visit summary subsection of the date summary section write**<<batch\_info.report\_list.date\_summary.visit\_summary>>**  |
| Batch start date | start\_date | **<<batch\_info.start\_date>>** |
| Batch end date | end\_date | **<<batch\_info.end\_date>>** |
| Date/time that the batch was created at | created\_at | **<<batch\_info.created\_at>>** |
| User who created the batch | created\_by id name | **<<batch\_info.created\_by.id>>****<<batch\_info.created\_by.name>>** |
| Date/time that the batch background job status was updated (for example, from STARTED to FINISHED) | updated\_at | **<<batch\_info.update\_at>>** |
| User who updated the batch (will always be the same as the user who created the batch) | updated\_by id name | **<<batch\_info.updated\_by.id>>****<<batch\_info.updated\_by.name>>** |
| Batch ID | id | **<<batch\_info.id>>** |

**Print details**

This information refers to generic information available to include in all printed documents in AlayaCare.

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in template** |
| Agency address line 1 | agency.address.address\_line1 | **<<print\_details.agency.address.address\_line1>>** |
| Agency address line 2 | agency.address.address\_line2 | **<<print\_details.agency.address.city>>** |
| Agency address city | agency.address.city | **<<print\_details.agency.address.city>>** |
| Agency address country | agency.address.country | **<<print\_details.agency.address.country>>** |
| Agency address province or state | agency.address.state | **<<print\_details.agency.address.state>>** |
| Agency address zip code | agency.address.zip | **<<print\_details.agency.address.zip>>** |
| Client address line 1 | client.address.address\_line1 | **<<print\_details.client.address.address\_line1>>** |
| Client address line 2 | client.address.address\_line2 | **<<print\_details.client.address.address\_line2>>** |
| Client address city | client.address.city | **<<print\_details.client.address.city>>** |
| Client address country | client.address.country | **<<print\_details.client.address.country>>** |
| Client address state or province | client.address.state | **<<print\_details.client.address.state>>** |
| Client address zip code | client.address.zip | **<<print\_details.client.address.zip>>** |
| Client AlayaCare ID | client.alayacare\_id | **<<print\_details.client.alayacare\_id>>** |
| Client BRN | client.brn | **<<print\_details.client.brn>>** |
| Client BRN numbers | client.brn\_numbers | **<<print\_details.client.brn\_numbers>>** |
| Client date format | client.date\_format | **<<print\_details.client.date\_format>>** |
| Client date of birth | client.dob | **<<print\_details.client.dob>>** |
| Client emergency contact(s) details | client emergency\_contacts name phone\_number relationship  | **emergency\_contacts** is a collection of items: there can be more than 1 set of emergency contact data in the **emergency\_contacts** attribute. As a result, you cannot simply write **<<print\_details.client.emergency\_contacts.name>>** because there may be more than one emergency contact name. In Docmosis syntax, you would need to use **<<rr\_{the attribute name}>>** as the opening tag and **<<es\_{attribute name}>>** as the closing tag or **<<rs\_{the attribute name}>>** as the opening tag and **<<er\_{attribute name}>>** as the closing tag to loop through every element in visits before you can access what is inside. Between the opening and closing tag, insert the specific attribute you are looking to pull (**<<name>>,** **<<phone\_number>>** or **<<relationship>>** ) to access the data.For example:**<<rs\_emergency\_contacts>>****<<emergency\_contacts.name>>****<<es\_emergency\_contacts>>** |
| Client external ID | client.external\_id | **<<print\_details.client.external\_id>>** |
| Client gender | client.gender | **<<print\_details.client.gender>>** |
| Client name | client.name | **<<print\_details.client.name>>** |
| Client phone number | client.phone\_number | **<<print\_details.client.phone\_number>>** |
| Client time zone | client.timezone | **<<print\_details.client.timezone>>** |
| Date/time at which the batch was created | batch\_info\_created\_at | **<<print\_details.batch\_info\_created\_at>>** |

### Data available in templates for specific document categories

**Cover letter templates**

All information for cover letter templates is available as part of **batch information** and **print details**.

**Daily summary templates**

In addition to the information in **batch information** and **print details,** the following information is available for daily summary templates:

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in template** |
| Information related to a client’s completed visits | The following attributes are available to include in the daily summary template: attachments  config\_data diagnoses\_plural goals\_plural interventions\_plural default\_template\_url service\_task\_forms visit\_summaries attachments\_count employee\_name  goals\_count id interventions\_count service\_code service\_name service\_tasks\_forms\_count visit\_scheduled\_end\_time  visit\_scheduled\_start\_time work\_sessions clock\_in\_time clock\_out\_time vitals | To pull one of these attributes into a template, use the hierarchy shown under **Data that can be pulled** to create the correct Docmosis syntax. Separate sections and subsections with a period (.) Make sure to type the attribute exactly as it is formatted in the **Data** column.For example, write **<<service\_task\_forms>>** to pull for the forms from the visit’s service tasks or **<<visit\_summaries.attachments\_count>>** to view the number of visit attachments for the visit. |

Refer to the **AlayaCare standard daily summary template** for more information.

**Service tasks templates**

In addition to the information in **batch information** and **print details,** the following information is available for service tasks templates:

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in template** |
| Details related to the service tasks scheduled and completed for the client’s visits included in the batch | The following attributes are available:client address address\_line1 address\_line2 city country state zip agency address address\_line1 address\_line2 city country state zip name identifier name client\_logo config\_data diagnoses\_plural diagnoses\_singular goals\_plural goals\_singular interventions\_plural interventions\_singular is\_diagnoses\_enabled is\_goals\_enabled is\_interventions\_enabled date\_of\_printing filter\_data department from\_date funder service to\_date service\_tasks visit actual\_end\_at actual\_start\_at attachments\_count created\_by first\_name full\_name id last\_name forms\_count id scheduled\_end\_at scheduled\_start\_at service\_code service\_name work\_sessions clock\_in\_time clock\_out\_time visit\_goals goal\_data completion\_count count data comment completed completed\_by created\_at created\_by first\_name id last\_name created\_on goal careplan\_id completed\_at completed\_by completion\_note created\_at created\_by first\_name id last\_name department description diagnoses end\_date id is\_from\_library is\_primary last\_updated\_progress comment completed percentage updated\_at name progress\_type rank services start\_date status tags type updated\_at updated\_by first\_name id last name goal\_id progress\_percentage progress\_type updated\_at updated\_by first\_name id last\_name updated\_on visit\_id total\_completion\_count total\_count visit\_interventions intervention\_data completion\_count count data ad\_hoc comment completed created\_at created\_by external\_id first\_name id last\_name  created\_on duration intervention\_id intervention\_name intervention\_type is\_intervention\_required position updated\_at updated\_by external\_id first\_name id last\_name updated\_on visit\_id was\_added\_after\_clock\_in was\_completed\_by\_ivr work\_session\_uuid total\_completion\_count total\_count | To pull one of these attributes into a template, use the hierarchy shown under **Data that can be pulled** to create the correct Docmosis syntax. Separate sections and subsections with a period (.)Make sure to type the attribute exactly as it is formatted in the **Data** column.For example, write **<<service\_tasks.visit.actual\_start\_at>>** to pull the clocked start time for the visit or write **<<service\_tasks.visit.visit\_goals.goals\_data.completion\_count>>** to pull the number of goals completed for the visit. |

Refer to the **AlayaCare standard service tasks template** for more information.

**Care plan templates**

In addition to the information in **batch information** and **print details,** the following information is available for care plan templates:

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in template** |
| All information included on the summary and detailed view of a client’s printed care plan | The following attributes are available:allergies date  name  severity  treatment  type  careplan client\_id  complete\_user\_id  completed\_at  completed\_by  create\_user\_id created\_at  created\_by first\_name  id last\_name  created\_on  diagnoses  end\_date  goals careplan\_id complete\_user\_id  completed\_at  completed\_by  completion\_note  create\_user\_id  created\_at  created\_by first\_name  id  last\_name department department\_id description diagnoses  end\_date has\_related\_diagnoses id is\_from\_library is\_primary last\_updated\_progress name progress\_type  rank  service\_ids services  start\_date  status tag\_ids tags type update\_user\_id  updated\_at  updated\_by first\_name  id last\_name  careplan\_id complete\_user\_id  completed\_at  completed\_by  completion\_note  create\_user\_id  created\_at  created\_by first\_name  id,  last\_name  department  department\_id  description  diagnoses  end\_date  has\_related\_diagnoses  id  is\_from\_library  is\_primary  last\_updated\_progress  name  progress\_type  rank  service\_ids  services  start\_date  status  tag\_ids  tags  type  update\_user\_id  updated\_at  updated\_by first\_name  id  last\_name careplan\_id  complete\_user\_id  completed\_at  completed\_by  completion\_note  create\_user\_id created\_at  created\_by first\_name  id  last\_name  department  department\_id  description  diagnoses  end\_date  has\_related\_diagnoses  id  is\_from\_library  is\_primary  last\_updated\_progress  name  progress\_type  rank  service\_ids  services  start\_date  status  tag\_ids  tags  type  update\_user\_id  updated\_at  updated\_by first\_name  id  last\_name id  interventions careplan\_id  client\_id complete\_user\_id  completed\_at  completed\_by  completion\_note  create\_user\_id  created\_at  created\_by first\_name  id  last\_name  department  department\_id  description  end\_date  external\_link  frequency\_info  goals  has\_duration  has\_related\_goals  id  include\_485  is\_from\_library  is\_required  module  name  rank  recurrence  recurrence\_type  service\_ids services id name  start\_date  status  tag\_ids  tags  timezone  type  update\_user\_id  updated\_at  updated\_by first\_name  id  last\_name careplan\_id client\_id  complete\_user\_id  completed\_at  completed\_by  completion\_note  create\_user\_id  created\_at  created\_by first\_name  id  last\_name  department  department\_id  description  end\_date  external\_link  frequency\_info  goals  has\_duration  has\_related\_goals  id  include\_485  is\_from\_library  is\_required  module  name  rank  recurrence  recurrence\_type  service\_ids services id name start\_date  status  tag\_ids  tags timezone  type  update\_user\_id  updated\_at  updated\_by first\_name  id  last\_name name  start\_date  status  update\_user\_id  updated\_at  updated\_by first\_name  id  last\_name updated\_on  client address address\_line1  address\_line2  city  country  state  zip  agency address address\_line1  address\_line2  city  country  state  zip fax  name  phone\_number  alayacare\_id  dob  emergency\_contact  external\_id  identifier  name  phone\_number client\_logo client\_services client id  external\_id  funding\_block  id  name  service\_code id status  config\_data diagnoses\_plural  diagnoses\_singular  goals\_plural  goals\_singular  interventions\_plural  interventions\_singular  is\_diagnoses\_enabled"  is\_goals\_enabled  is\_interventions\_enabled  date\_of\_printing  equipments  functional\_limitations  include\_assessments  medical\_history account\_id  created\_at  created\_by first\_name  full\_name  id  last\_name  created\_on  data Allergies allergies\_list date  name  severity  treatment  type  unknown\_allergies  family\_medical\_history\_items family\_medical\_history  other\_family\_medical\_history  health\_history current\_medical\_history diagnosis  end\_date  notes  primary\_diagnosis  start\_date  treatment  past\_medical\_history diagnosis  end\_date  notes  start\_date  treatment  unknown\_medical\_history  hospitalizations recent\_hospitalizations end\_date  notes  reason  start\_date  unknown\_hospitalizations  immunization diagnosis\_history booster\_date  date  description  type immunization\_history booster\_date  date  type  other\_diagnosis\_history  other\_immunization\_history  unknown\_immunizations  infectious\_disease\_items infectious\_disease disease end\_date notes  start\_date other\_infectious\_disease  unknown\_infectious\_diseases  surgery past\_surgery\_history details  end\_date  notes  procedure"  start\_date  unknown\_surgeries  updated\_at  updated\_on  user\_id  mental\_status  nutritional\_requirements  other\_functional\_limitations  other\_mental\_status  other\_nutritional\_requirements  risks account\_id  created\_at  created\_by first\_name  full\_name  id  last\_name  created\_on  data  updated\_at  updated\_on  user\_id | To pull one of these attributes into a template, use the hierarchy shown under **Data that can be pulled** to create the correct Docmosis syntax. Separate sections and subsections with a period (.) Make sure to type the attribute exactly as it is formatted in the **Data** column.For example, to pull the date and time that the client’s care plan was completed, write **<<careplan.completed\_at>>**  |

Refer to the **AlayaCare standard care plan template** for more information.

**Visit attachment templates**

|  |  |  |
| --- | --- | --- |
| **Description** | **Data that can be pulled** | **What to type in template** |
| Information about the visits linked to the attachments | The following attributes are available: visits attachments\_count  employee\_name goals\_count  id interventions\_count  service\_code  service\_name  service\_tasks\_forms\_count  visit\_scheduled\_end\_time  visit\_scheduled\_start\_time  work\_sessions clock\_in\_time  clock\_out\_time clock\_in\_time  clock\_out\_time | Note: the **visits** attribute is a collection of items: there can be more than one set of visit information in the **visits** attribute. In Docmosis syntax, you would need to use **<<rr\_{the attribute name}>>** as the opening tag and **<<er\_{attribute name}>>** **as the closing tag** or **<<rs\_{the attribute name}>>** as the opening tag and **<<es\_{attribute name}>>** as the closing tag to loop through every element in visits before you can access what is inside. Between the opening and closing tag, insert the specific attribute you are looking to pull (for example, **<<attachments\_count>>**).For example, to pull the attachment count and employee name, write:**<<rr\_visits>>****<<attachments\_count>>****<<employee\_name>>****<<er\_visits>>**Note that **work\_sessions** is also a collection of items, meaning that there can be more than one set of work session information in the **work\_sessions** attribute. You will also need to use opening and closing tags to pull information for all work sessions of a visit.For example, to pull the clocked in and out times, write:<<rr\_visits>><<rs\_work\_sessions>>Clock-in/out:<<clock\_in\_time>> – <<clock\_out\_time>><<es\_work\_sessions>><<er\_visits>> |
| Plural name for diagnoses defined in System Settings | config\_data.diagnoses\_plural | <<config\_data.diagnoses\_plural>> |
| Plural name for goals defined in System Settings | config\_data.goals\_plural | <<config\_data.goals\_plural>> |
| Interventions naming defined in the System Settings | config\_data.interventions\_plural | <<config\_data.interventions\_plural>> |

Refer to the **AlayaCare standard visit attachments template** for more information.