

# Note templates

## Training videos - Other

A note can have pre-populated content when it's created. This includes the note that appears under each IAR-DST domain. These templates can be used as guidelines or to structure a note for a specific purpose.

To administer templates, go to [Actions > Manage organisation](#). On this screen, you can:

- Create a new, blank template.
- Edit your existing PHN's templates.
- Copy a template shared by another PHN.
- Shared templates are templates created by another PHN and shared.

The screen is divided into two sections:

1. **IAR-DST templates** (for the notes for each domain)
2. **Note templates** (based on the note types that appear when a new Note is created).

## Edit existing template

Click **Our templates** and select the template you want to edit from the list. If a template has been shared, it will have the



icon next to it.

Make changes as needed and then click **Save**.

## Copy a shared template

Click the **Shared templates** button to see a list of templates other PHNs have shared. You can click on the title of each to see what it contains.

To copy, click the **Copy and edit** button. This will create a new blank template and then copy the title and comments into the template. You can change the template's title as usual.

Click the **Save** button to store the template in your PHN's list of templates.

## Share your template

To share one of your PHN's templates, toggle on the **Shared template** switch and click **Save**.



*Shared template switch*

When another PHN copies your template, their changes do not affect your template, they become completely separate.

 January 26, 2026 14:42:36