Modifying a Letter Template

59 TDO KB November 25, 2025 New User resources 8.92K

Overview

How to edit a Letter template

Detailed Instructions

1. Click the **“Letters”** tab on the patient’s screen.
2. Click the **“Template”** tab.
3. Select the **“Template”** in the drop down box that you wish to modify.
4. If the template is **“Fixed”**, click the **“Save As”** button.
5. Name your new template.
6. If the template is not fixed, you can make your changes without the Save As step.
7. Click **“Test”** to check changes and merge fields.
8. Click **“Test Reset.”**
9. Click **“Save”** to save your changes.

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