Designing a New Letter Template

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Overview

How to design a new template in Letters

Detailed Instructions

1. Click the Letters tab on the patient's screen
2. Click Template, then click New
3. If you wish to base your new letter template on an existing template, select the Template in the drop down box and click the Save As button
4. Type a name for the new template
5. Create your template and format on the right side of the screen
6. Choose a token from the selections on the left side of the screen
7. Position the cursor in the document where the token should go
8. Click the Insert at Cursor menu
9. Test the information by clicking Test
10. Click Test Reset
11. Insert as many tokens as you wish, making sure to enter correct spacing before and after the token
12. Test your letter as often as you would like
13. Print your letter if you wish to check the final copy by choosing print from the file
14. Save your letter by clicking Save (this does not save to the patient's record)

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