

## Create a Letter/Clinical Note Template

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

The following process describes how to build standard templates for use in the Correspondence system. These can be used to create a letter to a patient or medical provider.

Letter/Clinical Note Templates templates for use in the rich text editing areas of CareRight.

When a Letter/Clinical Note template has an **audience specified**, ie: patient, referrer, discharge; it describes the content of the letter.

This can be standard free text or can be replacement variables which inputs existing data/text directly from a Patients record in CareRight.

### Create a Letter/Clinical Note Template

1. Click **Administration**.
2. **Select Correspondence from the left side menu.**
3. Select **Letter Templates**.
  - a. The letter Templates screen will display and show any existing templates already created.
4. Select the **New** button.
5. Complete the fields using the table below as a reference.
6. When you are finished editing your document select **Create Letter Template** to save.
7. Once you are happy with the letter template make sure it has the **Approved** check box marked to make it 'active'.

Field	Description	Example
<b>Letter template Details</b>		
Code	Enter a code for the templates in the Template field Tip – this might correspond to an existing document ID code or number	TRANS-001
Description	A name/description for the letter template.	Transfer Letter
<b>Letter Recipient</b>		
Letter Recipient	<b>Patient</b> - Letter to a patient  Appears under Patient > Correspondence > Create New > Patient Letters	Typically only one of these would be set to TRUE (checked)

<b>Referral</b> - Letter to a referrer  Appears under Patient > Correspondence > Create New > Referrer Letters		
<b>Appointment</b> - Letter linked to an appointment  Appears under Appointments > Right click appointment > Correspondence		
<b>Note:</b> If you are creating a template that can be inserted into Clinical Notes, Letter etc..., please leave the letter recipient field empty.		
<b>Details</b>		
Correspondence Type	Standard Letter -	
	Discharge Letter - This letter will be available as a discharge letter via the admissions screen.	
Approved (check Box)	Leave the Approved check box empty until you have completed the document. While the check box is unchecked it is not available for selection by users. Once Approved the template is activated and can be used in a client record.	Yes
<b>Letter Text / Editor</b>		
Text	<p>The text field provides a place to enter the text for the letter.</p> <p>You can also add data fields from the patient record (e.g. name, admission start date, discharge date, etc) into the template. You can also add images.</p> <p>See section <a href="#">Using the Text Editor</a> for a detailed explanation of how the Text Editor works.</p>	see example letter template below.

#### An example Letter is below.

Fields from the patient record can be added to letter templates, these are known as Replacement Variables. See [Replacement Variables](#). Replacement Variables in letter templates are surrounded by curly brackets [ VARIABLE NAME ] and are inserted via Menu Option: Insert > Replacement Variables:

Code: DISCH-001

Description: Discharge Letter

Discharge Letter: Yes

Approved: Yes

Text:

{ Current Date }

Dear { Recipient },

Please be advised that your patient { Given Name } { Surname }, { Date of Birth } of { Home Address (Street) } { Home Address (Suburb) } has been a patient in this hospital from { Admission Date } to the { Discharge Date }. Their separation status was { Discharge Status }.

They presented with { Presenting Problem } and they were admitted because { Admission Reason }. On discharge the final diagnosis was { Discharge Diagnosis }.

#### **Medications**

{ Medications List }

#### **Problem List**

{ Problem List }

#### **Post Discharge Care**

{ Services Required }

Yours Sincerely,

{ User }

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