

Create Appointment Letter Templates

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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.

1. Create a new letter template

1. Click **Administration**
2. Select **Correspondence** from menu
3. Click **Letter Templates**
4. Click **Create New**.
5. Fill in the Fields using the table below for reference.
6. When done, click **Create Letter Template**.

Field	Description
Code	Enter a code for the templates in the Template field Tip – this might correspond to an existing document ID code or number
Description	A name/description for the letter template.
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 Using the Text Editor for a detailed explanation of how the Text Editor works.</p>
Letter Recipient	Patient - Letter to a patient - Appears under Patient > Correspondence > Create New > Patient Letters
	Referral - Letter to a referrer - Appears under Patient > Correspondence > Create New > Referrer Letters
	Appointment - Letter linked to an appointment - Appears under Appointments > Right click appointment > Correspondence
Discharge Letter	This letter will be available as a discharge letter via the admissions screen.
Approved	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.

2. New letter template example

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

```
Code: PT-ADMIT-LTR
Description: Patient Admission Letter
Letter Recipient: Patient=Yes, Referrer=No, Appointment=Yes
Discharge Letter: No
Approved: Yes
Text:

{ Current Date }

Dear { Recipient },

Below are details for your upcoming surgery with { Current Provider }:

Date: { Current Start Day }{ Current Start Date }
Time: { Current Start Time }
Location: { Current Theatre Location }

Fasting instructions: You are required to fast from { Current Fasting Time }.

{ Current Pre op Patient and Hospital Note }

Please contact us if you have any questions.

Yours Sincerely,

{ User }
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