

## Steps to attach a letter template to Socrates.

1. Navigate to "My Control Panel \ Admin Console \ System Types"
2. Click on the "Letter Templates" tab along the top
3. Type in a name in the "Name" text box (eg; GP Referral letter) and select a Letter Type to associate it with (eg; Referrals).

My Control Panel Admin Console

Letter Types Letter Templates Note Templates Account Types Other Types

### Letter Templates

View Type Referrals

#### Add Letter Template

Name  **Give the template a name**

Letter Type  **Select a letter type in the dropdown**

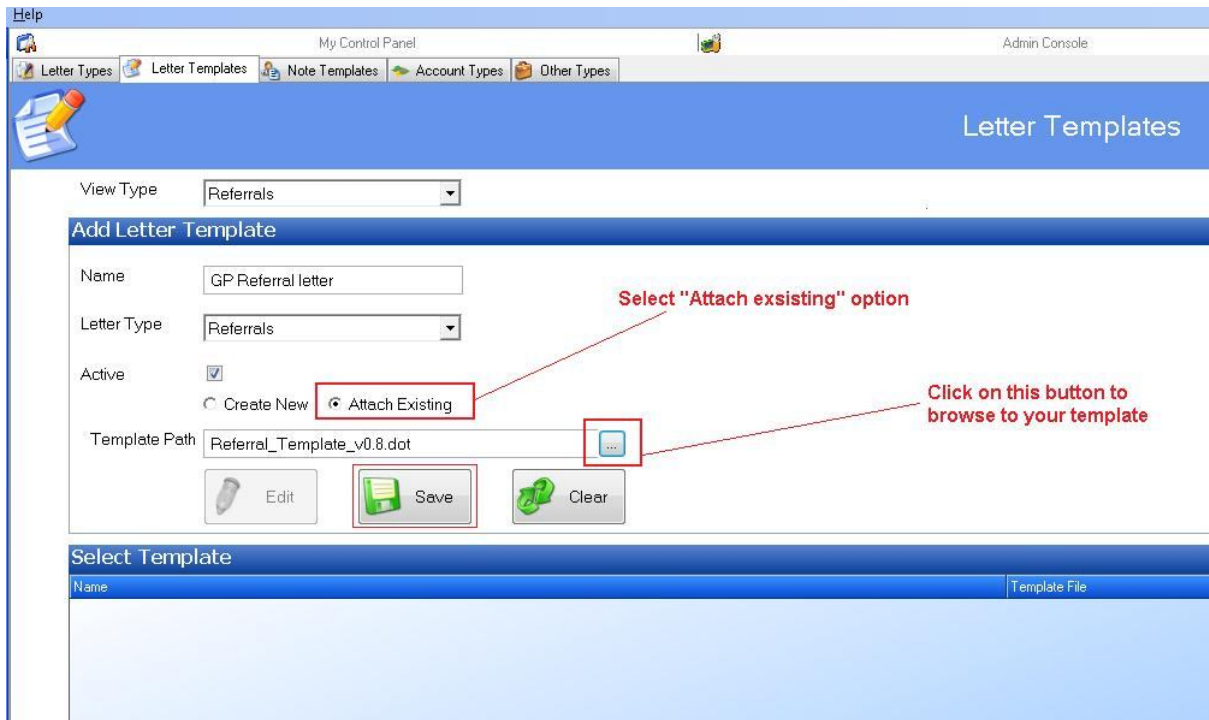
Active

Create New  Attach Existing

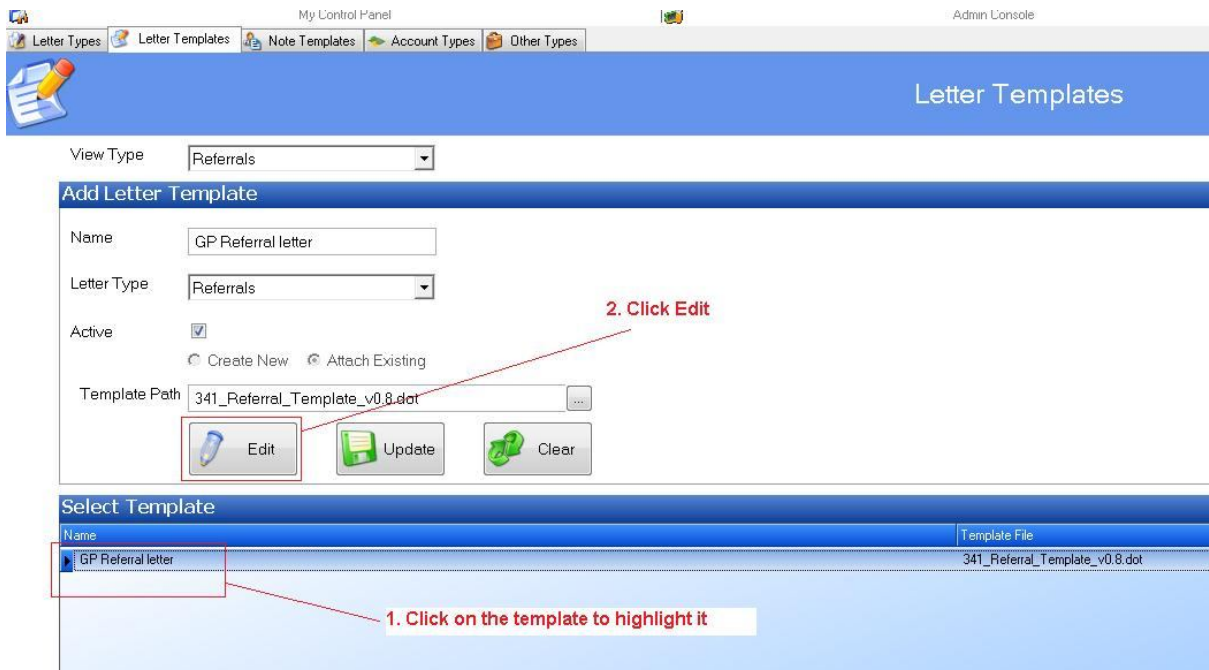
#### Select Template

Name	Template File
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4. Click on the option button "Attach Existing"
5. Browse to the template file by clicking on the small button with the 3 dots
6. Once the template is selected, click "Save"



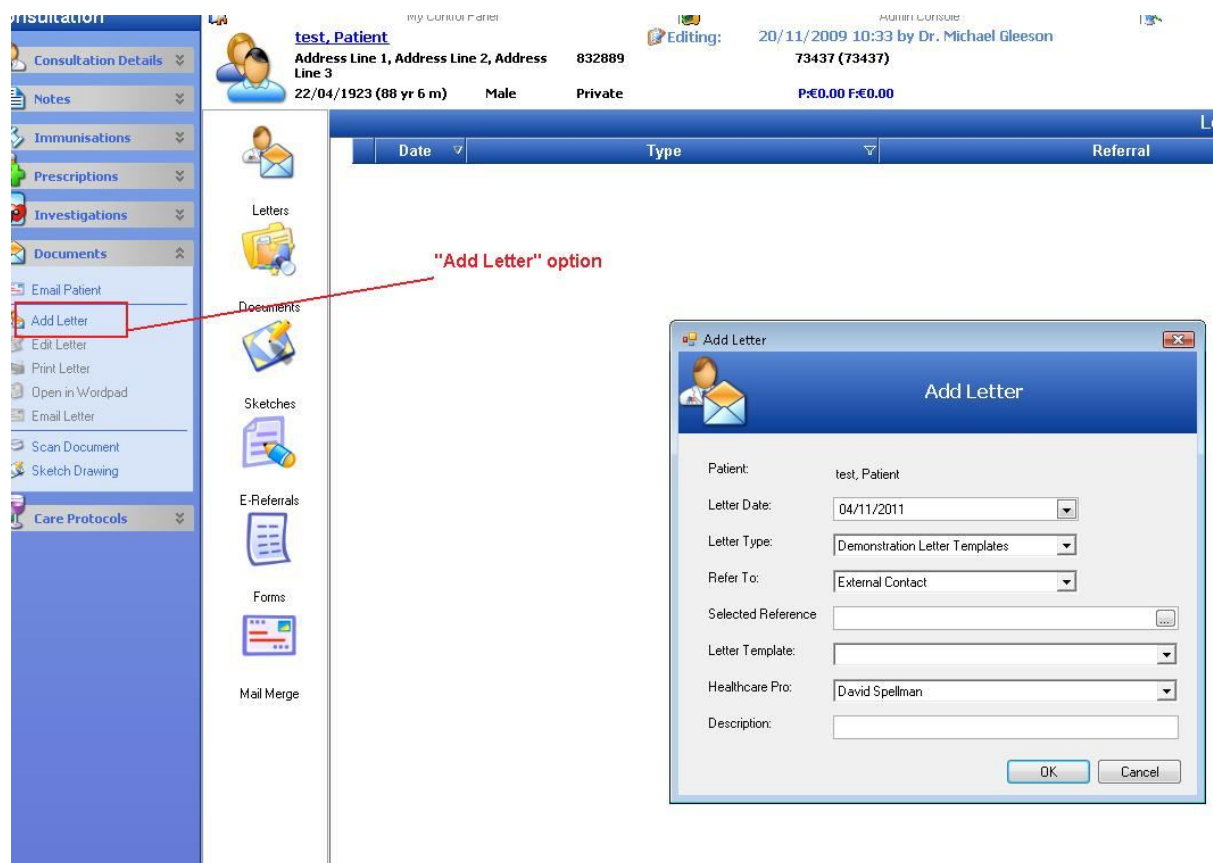
7. To edit the template after you can highlight the template name in the grid and click on the Edit button.



8. The template will then open in Microsoft word, you can make changes, then save & close.

## Steps to add a letter to a patients chart in Socrates.

1. Open the patients chart
2. Begin or edit a consultation
3. Click on "Documents"
4. Click on "Add Letter" along the left
5. The Add Letter dialog appears



6. Select the Letter type (eg; Referrals).
7. Select the Letter Template (eg; GP Referral letter)
8. In the Refer to drop down select "External Contact"
9. In "Selected Reference" text box click on the button with the 3 dots to search for the person you are referring the patient to.
10. Select the appropriate HCP in the "Healthcare Pro" drop down
11. Click "Ok"

12. The letter is added to the patients chart and will open automatically in Microsoft Word.

13. Make any changes you require and Save the letter.

14. The letter is always available in the documents section of the patients chart in Socrates.

The screenshot shows a patient chart interface. At the top, there is a header with 'test.Patient' and various details including address, date of birth (22/04/1923), gender (Male), and insurance status (Private). Below this, a table titled 'Letters' is displayed. The table has columns for Date, Type, Referral, Template, and a partially visible 'Comp' column. One entry is shown in the table.

Date	Type	Referral	Template	Comp
04/11/2011	Referrals	Louise Test	GP Referral letter	