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).

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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"

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

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	1. Click on the template to	highlight it	

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

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- 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.

