Using Templates

Templates are designed to be used in conjunction with patient data. They provide a quick method of writing everyday letters in the practice.

Once a letter has been created using a template in can be edited and enhanced by using the same techniques employed in writing a free format letter described earlier.

As an example we will send Sarah Tennant to see a consultant with a referral letter ™generated by HEALTHone™.

Next, we will archive the consultants reply into her file.

Opening a Health Care Record

1) If the Patient Selector window is not already open select the menu File / Open / HCR.

   Patient selector window is now open.

2) Type: Te in the surname filter

3) Select Sarah Tennant in the patient list.

4) Click on the Select button.

   ɫ   The Health Care Record for Sarah Tennant opens.

Creating a New Transaction

We wish to record the fact that she has been referred to hospital.

1) Click once on the Create Medical Transaction button on the Transaction Panel Toolbar.

   ɫ   The Transaction Properties dialogue box appears.

Transaction Attributes

2) Complete the Transaction Properties dialogue box by ensuring that the attribute values are set as follows:

Type	Contact
Name	Consultation
Responsible	Your name
Date of event	Current date and time
Speciality	general practice
Legal Structure	As is
Problem	None

3) Click on the OK button.

   ɫ   New transaction is completed and appears at the end of Sarah Tennant's medical chapter.

Using Templates

Inserting the Referral Item

1) Click once on the Item Selector button on the Item Panel Toolbar.

   ‒ The Item Selector window opens.

2) Type: Ref in the Item Find box.

   ‒ Item list reduces to those that begin with 'Ref':

3) Select the item: referral   Click on OK

   ‒ The Item 'Referral:" in inserted into the new transaction and its associated list box opens.

4) Ensure the term Hospital is selected.   Click on the Insert button. Select any hospital from the sub list. Click the Insert button once more.

   ‒ The terms 'Hospital" and its name are entered as a response.

   ‒ The Referral Item window is still open.

5) Click once on the Associated List button (to the right of the blue book)

   ‒ Associated list re-appears.

6) In the find box type: R   Select the term respiratory medicine in the list. Click on the Insert button. Select respiratory function tests from the sub list. Click the Insert button once more. Click Close to close the associated list box

7) Click OK to close the referral: item edit box.

8) Save and validate this transaction by click on the diskette button on the HEALTHone^{TM} standard toolbar.

Creating the Referral Letter

Now that her referral to the consultant has been recorded we now need to give her a letter. For this we need to select the transaction which best describes her complaint. Selecting this will make it the current transaction and the template will pick up its details and merge them into the referral letter that it creates.

The transaction which describes her complaint best is the second one in the medical section (the first transaction is her basic medical information).

1) Select the transaction immediately beneath the basic medical information one by clicking on it once in the Transaction Overview panel.

   ‒ The selected transaction is now considered as the 'current transaction"

Using Templates

Creating the Referral Letter

2) Now select the menu sequence: Tools / Run template

    ꓺ A box of templates appears.

3) Select the template: quicklet.cvs and click on the OPEN button.

    ꓺ The quicklet template runs and a new letter is created and displayed in the text editor window. See Fig.1
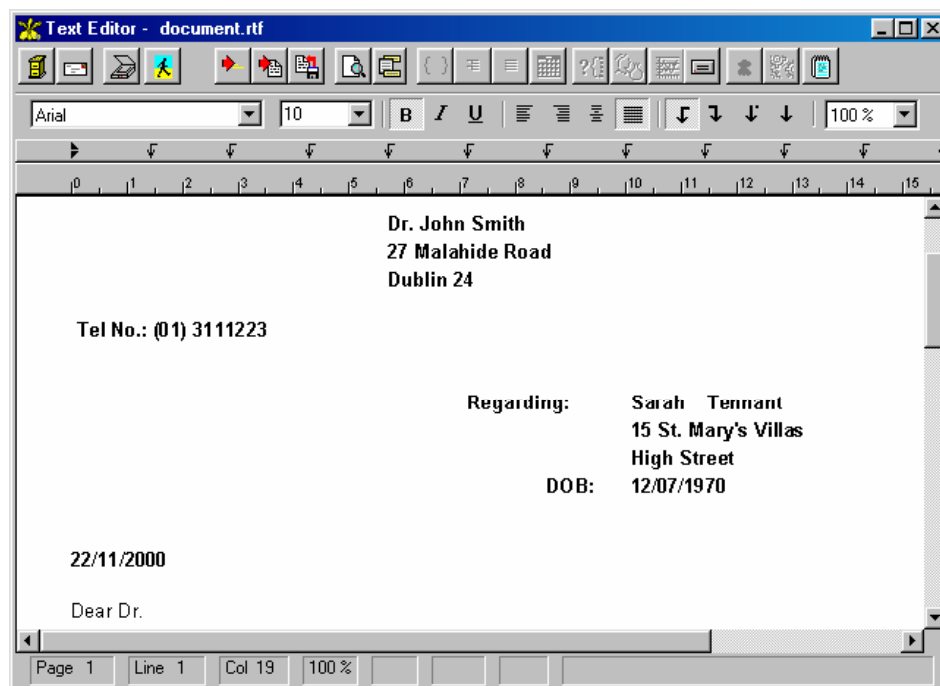

Fig.1 Text Editor Window

4) Use the scroll bars to view the full contents of the letter.

5) Use the editing techniques to enhance the appearance of the letter and alter its contents.

Printing Your Document

To Preview Before Printing:

1) Select the menu sequence: File / Print Preview or alternatively simply click on the print preview button on the Speed Toolbar.

2) Click with the left mouse key to ZOOM IN or right mouse key to ZOOM OUT the preview of the page.

To Print

3) Select the menu option: File / Print. Select the page range and number of copies required. Select OK.
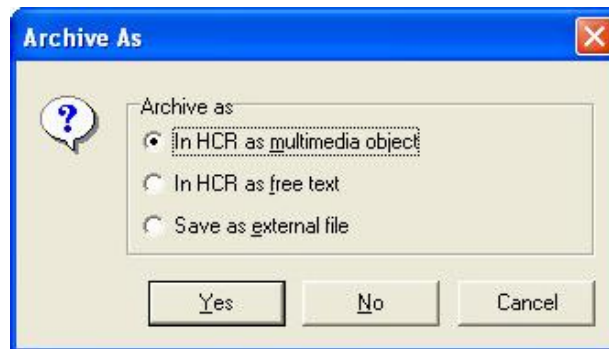
Using Templates

Saving the Document.

1) Select the menu sequence: File / Save
2) Type in a name for the document
3) Click on the Save button.

Closing a Document (and the Text Editor)

4) Select the menu   File / Close

   ∤   If you have already saved the document it will now close and
       the text editor will automatically close as well.

   ∤   If you have not saved the document HEALTHone^{TM} prompts :

   ∤

5) Choose your option from this list and click Yes.

   ∤   If you choose 'In HCR as multimedia object'; it will save the
       document into the patients file.

   ∤   If you choose 'In HCR as free text'; it will save the text of the
       letter into the patient's file as free text.

   ∤   If you choose 'Save as external file" it will save the document
       as a file on your computer.

   ∤   Upon completion the document will close and the text editor
       will automatically close as well.

   Note: If you click No, the document won't save, and if you click
   Cancel it will bring you back into the letter to continue editing.