NECS Clinical Systems Specialist Team

EMIS Web - Creating Letters Mini Guide

Author: NECS Clinical Systems Specialists Team

Revision date: 19/05/2020

Table of Contents
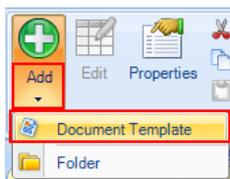
Contents

Create a Document Template

1. Open the **Template Manager** from the **EMIS Button** via **Configuration**.
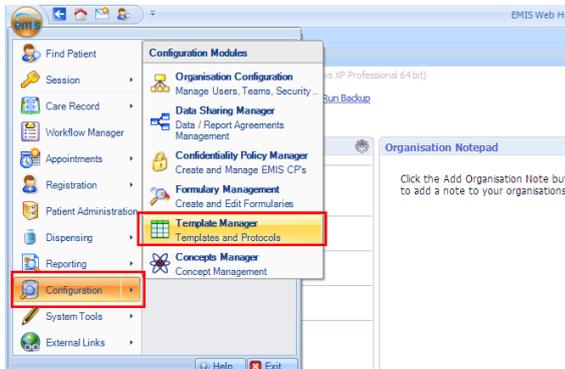
2. Select **Document Templates** tab on the Navigation Pane.

3. Click **Add** drop down and select **Folder** to create a new folder. Name as appropriate.
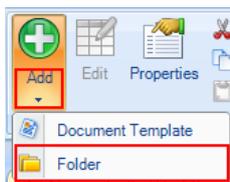
4. To create a new word document, click **Add** drop down and select **Document Template**.


5. Microsoft word integration will open with the mail merge fields available for use on the left pane of the screen.

6. Create your letter as appropriate.

7. There are several mail merge sections that are available for you to use depending on the letter type you are creating.
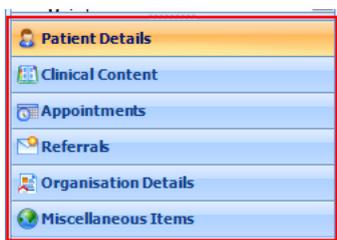
8. To select a mail merge field, click to select the section required and double click the mail merge to use.

    Note: a dialogue may display for you to complete depending on the mail merge selected. e.g. if **Clinical Content** is selected you will need to select what information will merge through from the patient record.
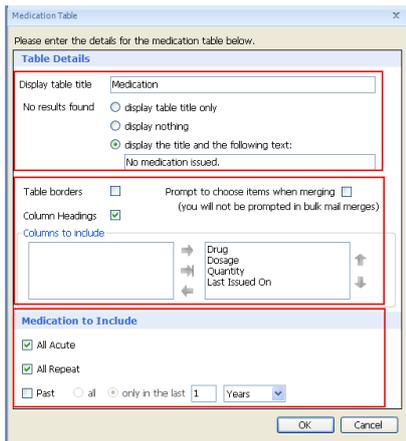
If a **Free Text Prompt** or **Body Text** is selected from the **Miscellaneous** section, you will need to decide what text will prompt the user and if a Display Group is needed (ask as section header).
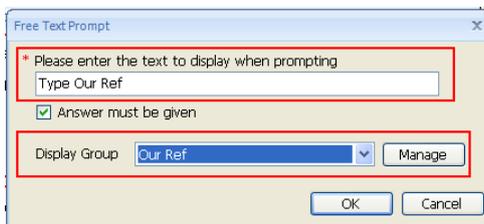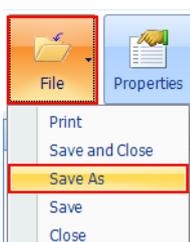

9. You can test the merge fields to ensure they are correct by selecting **Test Merge** from the ribbon.


10. This button will change name to **Edit Template**. Click this again when the testing is complete.

11. When the document is complete, click **File** from the ribbon and select **Save As**.

12. The properties dialogue will display for you to complete. You will need to name the document, give a description of use and select default document type if appropriate (read code). Click **OK** when done.
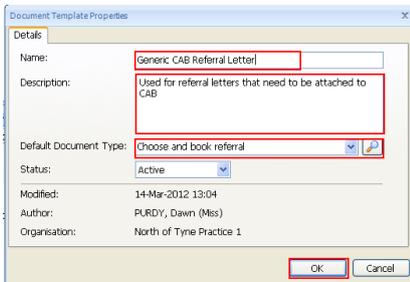
13. You will now need to close the document. Click **File** and select **Close**.

14. The document will now be displayed within the appropriate folder.

Editing a Document Template

1. The name of the document can be changed by selecting **Properties** from the ribbon.

2. To edit the actual document, ensure it is highlighted and select **Edit** from the ribbon.

3. The document will now open and changes can be made as appropriate.

4. When done click **File** and select **Save and Close** and the document will be saved.
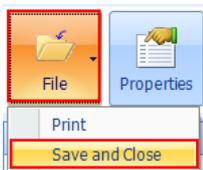
5. To view the history of changes made, ensure the documents is highlighted and view the bottom pane of the window.