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SystmOne - Creating Word Letter Templates Guide

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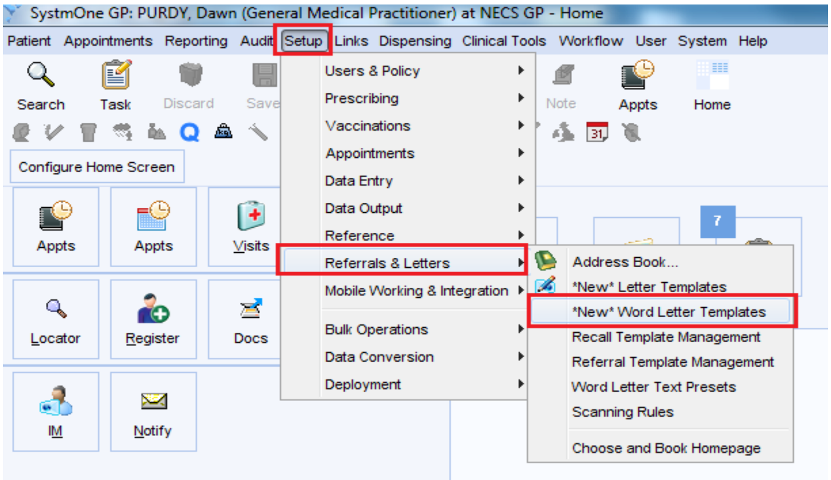
Creating a New Letter Template

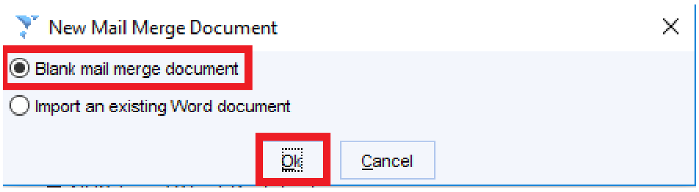
1. Click **Setup** and select **Referrals & Letters** – **New Word Letter Templates**



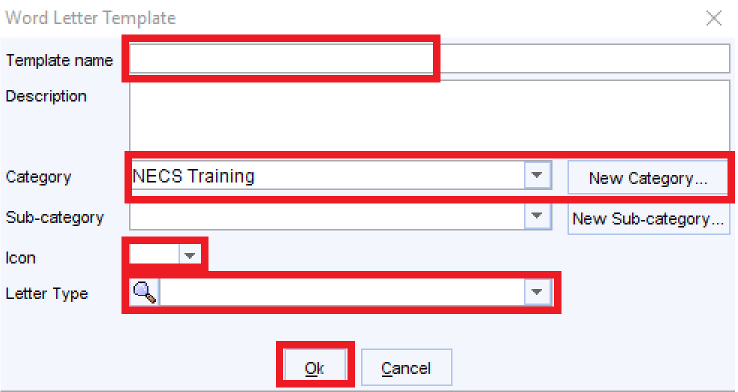
2. Click **New Template**

3. Select **Blank Mail Merge Document** if you want to create the Word letter template yourself

   a. Select **Import an existing Word document** if you already have a letter template to use



4. Click **Ok**



5. Complete the following:

    a. Name of the template
    b. Give a brief description (optional)
    c. Select or create a new category
    d. Select or create a new sub category (optional)
    e. Select a relevant icon (optional)
    f. Select an appropriate letter type – doing this will save time for users completing this template

6. Click **Ok**

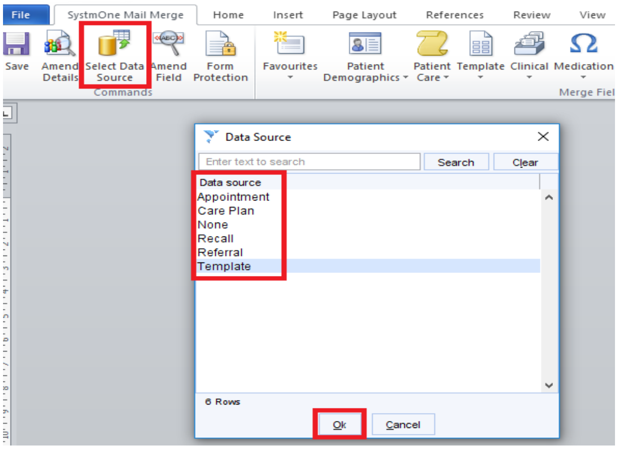
    Microsoft Word will open for you to design your letter template. There is a new ribbon tab called SystmOne Mail Merge. In this tab you will find the merge fields that connect to SystmOne. You will also find the template details and **Save**.

Setting a Data Source

Setting a relevant data source for your letter template will ensure the merge fields available suit that letter. For example selecting an Appointment data source will provide you with appointment detail merge fields.

Setting the data source for your letter will also dictate where the letter can be created. For example appointment letters will be available in the appointment screen. Recall letters will be available on the recall letter screen. If you ever struggle finding a letter template in a patient's record you may need to check the template's data source.

1. In the letter template screen click **Select Data Source**

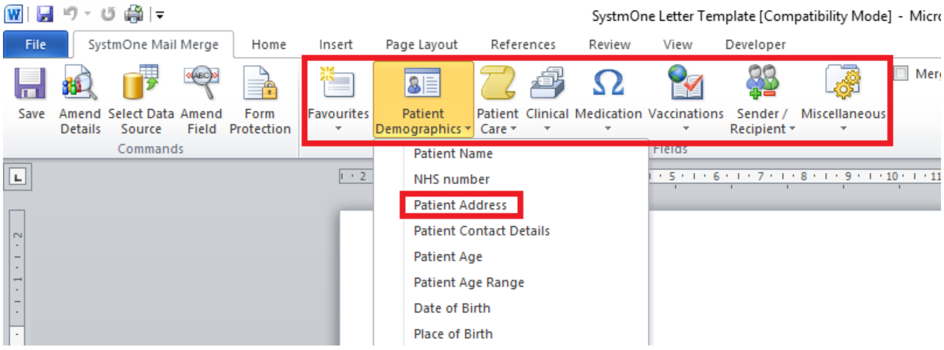


2. Select the appropriate data source, or leave set to None

3. Click **Ok**

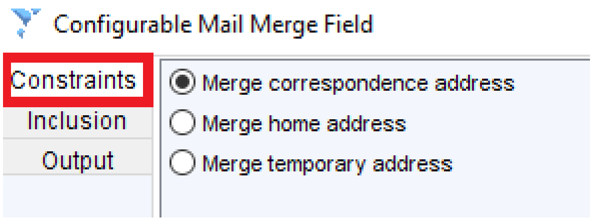
Using Merge Fields

The Mail Merge fields are displayed within the SystmOne Mail Merge menu.

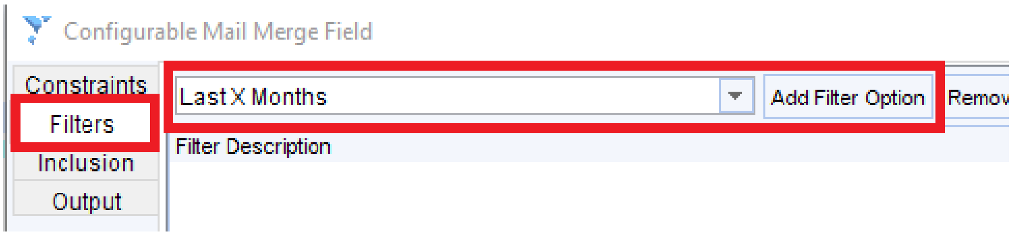


1. Select the desired merge field from the list. You are then given options for configuring how the information is displayed

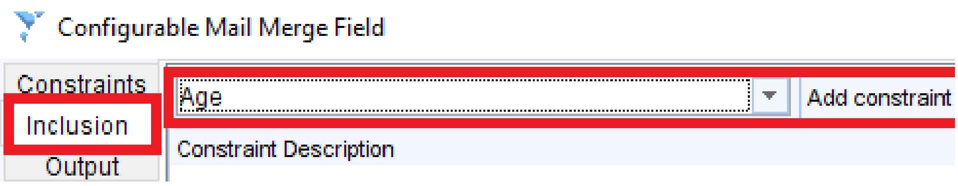
2. **Constraints**: If there are any e.g. select specific read codes, medication etc.



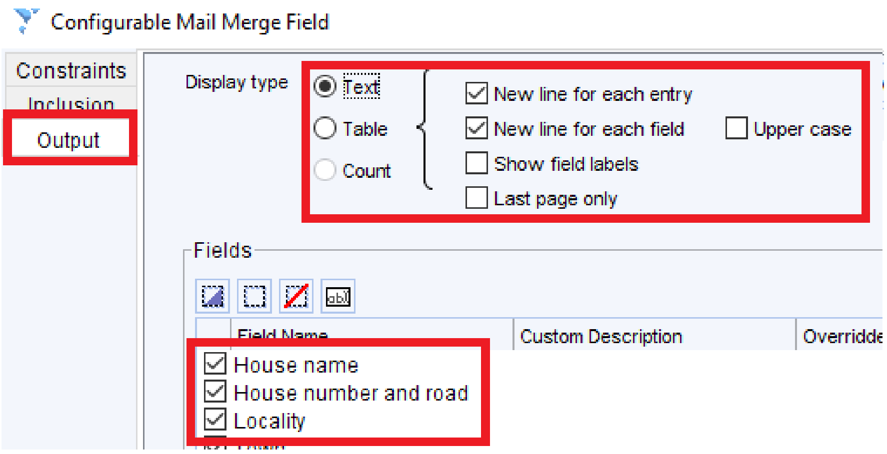
3. **Filters**: If appropriate select to only include last x item, date range etc.



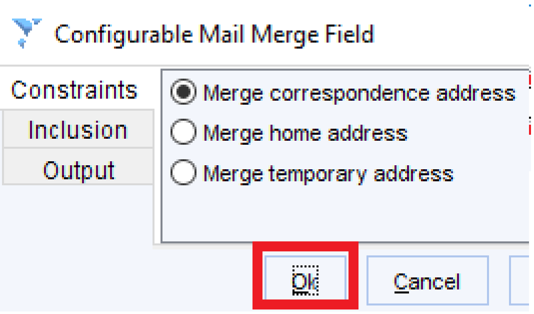
4. **Inclusion**: Specify if the mail merge should only display if the patient matches the age criteria set



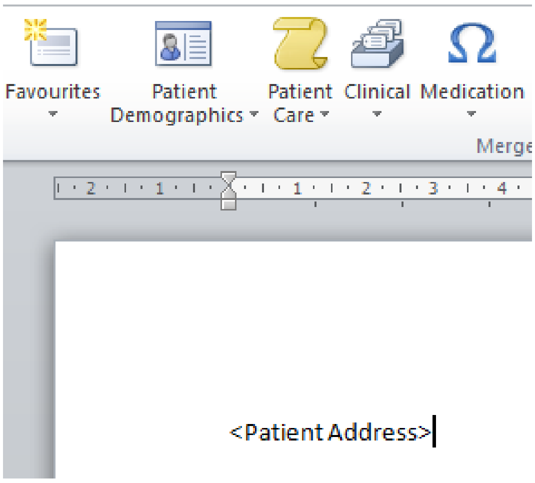
5. **Output**: Specify how the mail merge field will display e.g. within a table or as part of the text, which information to display



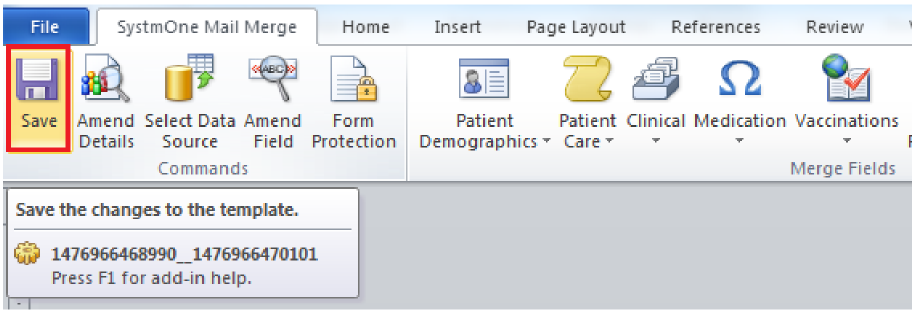
6. Click **Ok**



The Merge field is now added to your letter



7. When the template is complete click the **Save** button in the SystmOne Mail Merge tab



You will now see your template in the list of active templates