

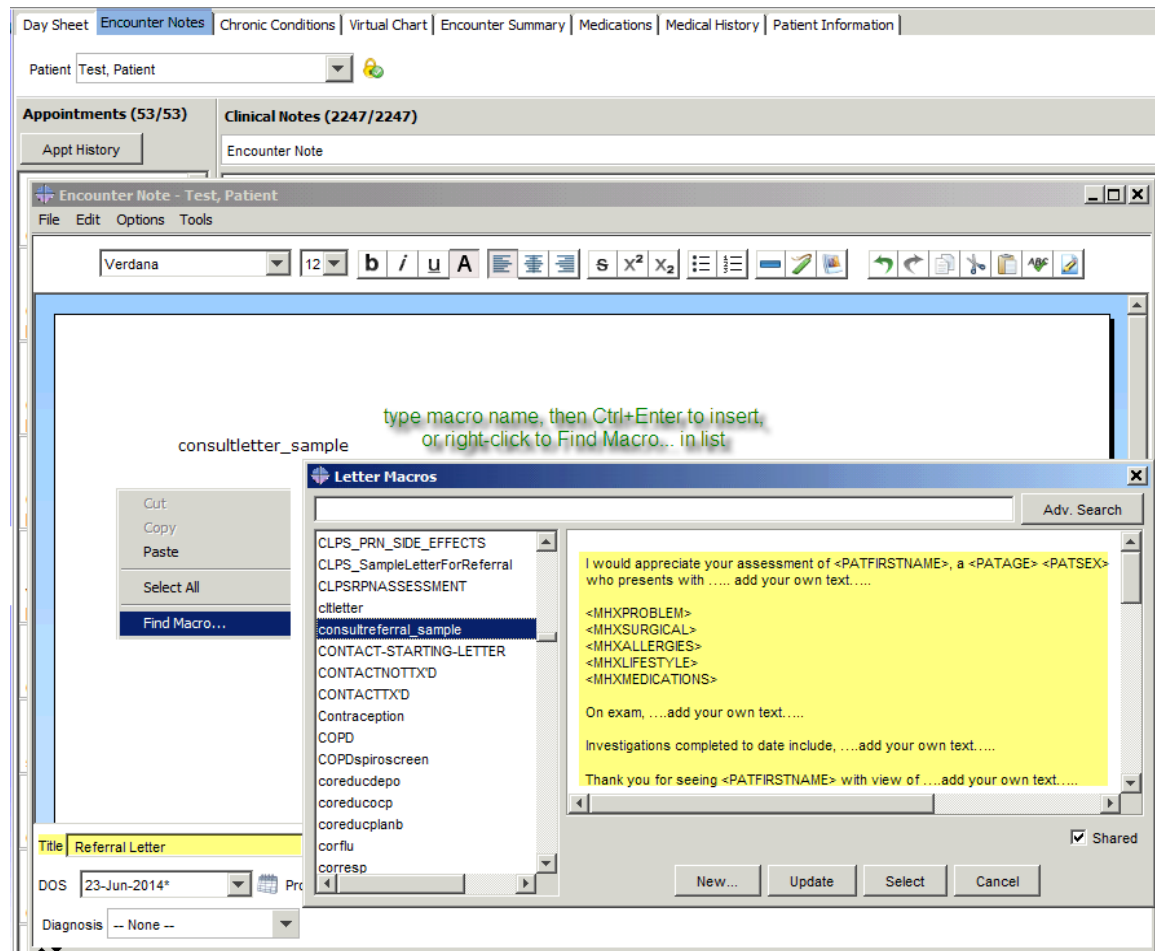
Generate Letters

This section details how to create and edit consultation and referral letters as well as other letters you may be required to write on behalf of your clients.

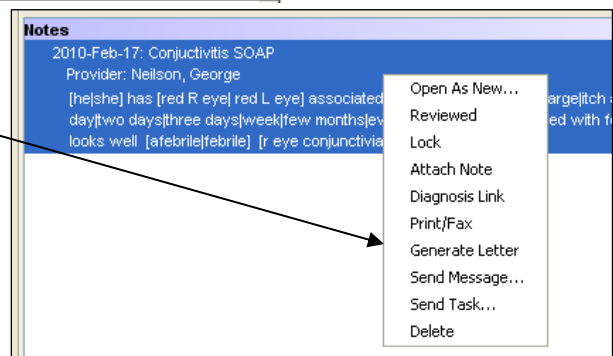
1. **Create** a new Note by choosing **Referral Letter** Note type/title.
2. Create your body of the letter in the note.

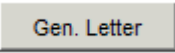
If this is not a Referral Letter, create a new Encounter Note and change the note title to *Letter* and rename the Encounter Note accordingly.

3. If using a **Macro** as template for the letter, you may type the **Macro name** then Ctrl+Enter, or right-click and Find Macro... selecting from the list (e.g. 'consultreferral_sample').





4. Click **OK** to save and close the Note.
 5. Right-click on the Referral Letter Note > select **Generate Letter**.
The Letter Generation window opens up.
- Or




Within the Encounter Note window Select the  icon at the bottom of the note.

6. In the **From:** drop-down list select who the letter is from.



7. To pick a recipient for the letter in the **To** text box, click the **Search**  icon. The **Address Book** window opens.

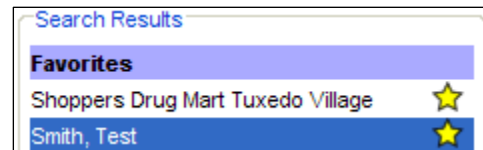
 **TIP:** If the recipient is a client or it is a one time letter, choose yourself in the **Address Book**

8. In the **Address Book** text box, type the last name of the provider and click on the **Search**  icon.




9. Select the name from the **Search Results** and then click on the **Select** icon.

 **TIP:** Click on the **Star**  icon beside the desired provider to turn the star colour to yellow and mark this name as a **Favourite**. This provider's name (along with any Pharmacies that may have been "starred") will now appear on a "short list" so you don't have to search for them again.







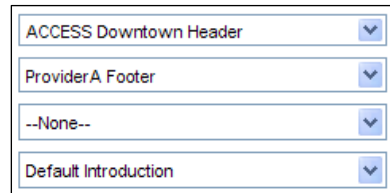
NOTE: The Pharmacy Address list is maintained by Manitoba eHealth. Call Service Desk if you notice information is incorrect or you need a new pharmacy added.

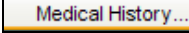
10. By default, Accuro always addresses letters to the Client's Referring Physician and cc's the Client's Family Physician (if different) as identified in the Patients section >

Demographics tab. To send a carbon copy to other providers, click on the **Add**  icon in the **Carbon Copies** section and Steps 7, 8 and 9 above to search for and select provider(s).


11. From the next four drop-down lists, choose the desired

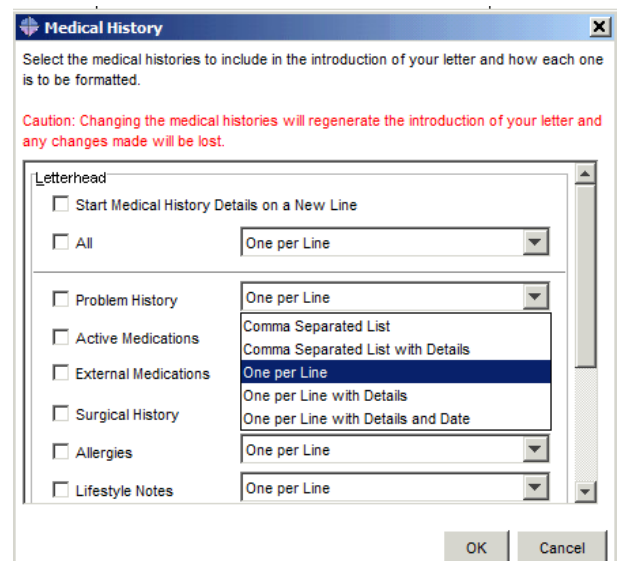
-  Letterhead
-  Footer
-  Watermark – Not Applicable
-  Default Introduction



12. Click on the **Medical History**  button and click on the desired histories to be included in the letter.


Additional options are available for the listing displays. Display either as a single line or comma separated. Select the appropriate option from the drop down in addition to selecting the history.

NOTE: The **Copyable History**  icon copies information from the Medical History section of any of the default bands. Details from custom bands added to the system are not included in this feature.



13. Click on **OK** to close the Medical History window.


14. Click on the **Add**  icon in the **Attachments** section.

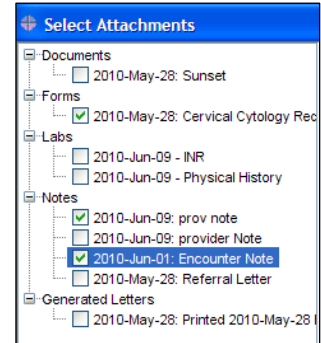
 **TIP:** You may have to click on the Maximize icon at the top of the Letter Generation window to see the Add icon.
The Select Attachments window opens.

15. **Click** in the checkboxes to select the items you want to attach to the letter.

16. Click **OK** to close the **Select Attachments** window.

17. Within the body of the letter itself, type any changes, additions or deletions as desired.

 **Tip :** If adjusting items within the body of the letter selecting *Apply* prior to managing additional settings from the left side panel will ensure your changes are saved.




18. If desired type a **Title** to clearly identify this letter.


19. From the **DOS** drop-down list, choose the date of service you want this letter to reference.


20. If you want this letter linked to a specific **Diagnosis**, choose or add the desired diagnostic linking code.





21. **Choose** one of the button options:


 **Options** – this opens the Letter Queue Options where a Note can be entered to describe the type of referral letter and the Priority drop-down can be used to rank the task as Normal, Urgent or Very Urgent. As outlined in Step 12 above, a task alert is created.


 **Add to Letter Queue** to save this letter as a draft or if more information (such as a missing fax number) needs to be added to the letter.


 **Generate in MS Word** – this feature is not available.


 **Send Letter** - Use this option to open the **Letter/Fax Recipients** window to choose to Fax or Print the currently opened letter


 **Print** to send the letter to the printer.

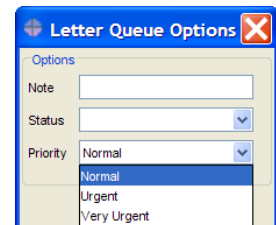
 **Preview** displays how each page of the letter will look.

 **Apply** this applies changes made to the body of the letter to the clinical note the letter was generated from.

 **OK** to close this window.

 **Note:** Any modifications made in the generate letter window will be captured within your clinical note, but no generated letter will exist on the virtual chart.

 **Cancel** to abort this letter generation.



Generate Consult / Referral Letter in EMR



Note: If this is a Referral Letter the **Referral Letter** ☐ checkbox is located in the Letter/Fax window. This task referral can only be selected when sending a letter via fax.

Letter / Fax Recipients

Recipient	Address	Long Distance	Fax	Print	Fax Number
Dr. Magdy F Zaki		.	✓	.	(204) 940-5500
Dr. Jennifer Wellborn		.	.	✓	(000) 000-0000

☐ Referral Letter --New Referral Task--

☐ Send Faxes Later ☒ Include Coversheet

Send Preview Cancel

Using this option will generate Tasks to Complete alert viewable in the **Patient Tasks (F7)** window.

If the Referral Letter has been received, select the task and click on the **Complete** button to remove this task from the outstanding list.

Patient Tasks (F7)

Patient: Test, Patient Work Phone: (204) 940-5500

Tasks to Complete New...

- 2011-Jan-26: **Referral Letter** [Referral to Dr. BILL BEAR]