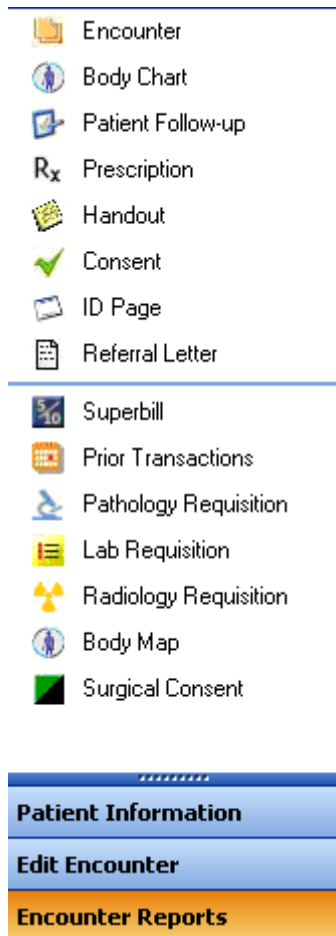


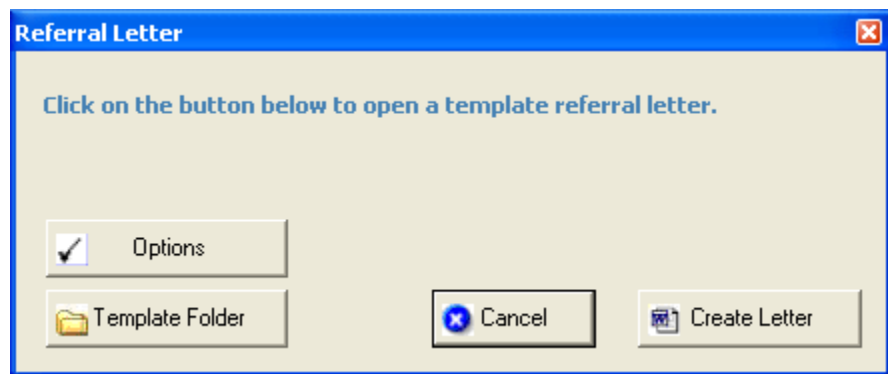
# Quick Sheet: Creating Referral Letters

## Recommended approach:

To take advantage of doc2MD's referral letter module, first get a list of all your referral physicians and organizations. Once you have the list, open the Example\_Mohs.docx in the ReferralLetters folder. To access this folder, open an encounter and select the Referral Letter under the Encounter Report navigation group.




Once selected, you will be presented with the following dialog:



Click on the Template Folder to open the folder where Referral Templates are stored. If a template is not in existence, a sample will be created for you to use as a template.

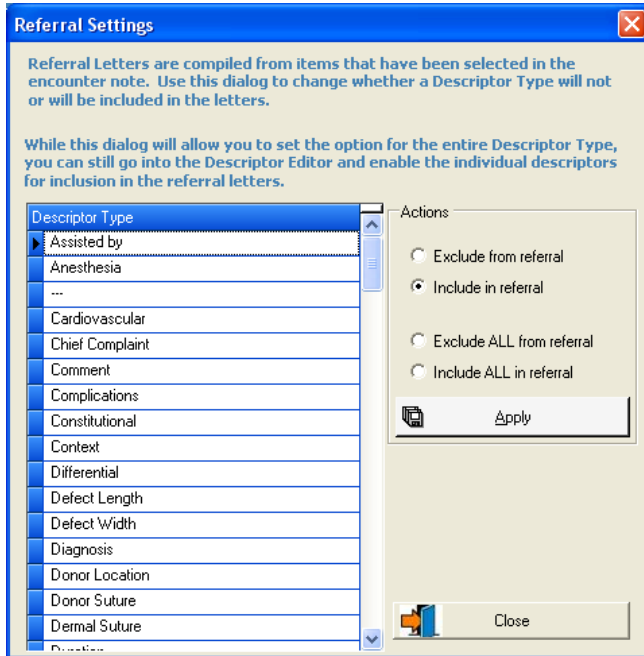
Use the sample to create a new template for each referral source. (Example: [DoctorSmithMohsReferral.docx] or [DoctorJamesStandardReferral]). Add any logo or formatting change you wish on the first one so that subsequent templates match. Once complete, you may open a new encounter and referral dialog to create a letter.

To create the letter, press the Create Letter dialog, and then select the appropriate referral source. Once created, each resulting document is stored in the patient's electronic chart  Referral-20090727.doc .

## Referral Letter Content

Within each referral letter, there is a section called EMR\_Content. This section (a bookmark within the document) is where the information from the Medical Note will be inserted. You can control the details being inserted by selecting the Options button on the Referral Letter dialog.

Once selected, you will be presented with the following dialog:



By using this dialog, you can configure doc2MD to include or exclude components of the medical document to be inserted. By default, all components are included.

To exclude a component, select it from the Descriptor Type list and choose the action to take (Exclude from referral) and then press Apply.

Once your items have been configured properly, you can close the dialog and create your referral letters.