

From the Office of Health Informatics Message Center Patient and Provider Letter Template Defaults

April 17, 2025

Patient and Provider letters will default the contact information for the primary location of providers who work at more than one location. When working at a secondary location, providers will need to manually update the contact information.

Setting New Letter Defaults

- **<u>STEP 1</u>**: Navigate to **Message Center**.
- **<u>STEP 2</u>**: Select **Inbox** menu at the top of the screen.
 - Select Manage Preferences.
 - Set up window opens.
- **<u>STEP 3</u>**: In the **Behavior Prefs** tab, select **Reminder/Letter**.
- **<u>STEP 4</u>**: Navigate to **Defaults When Creating a New Letter** section.
- **<u>STEP 5</u>**: Set **Document Type (Patient Letter)** to Patient Letter.
- **<u>STEP 6</u>**: Set **Template (Patient Letter)** to Patient Letter.
- **<u>STEP 7</u>**: Set **Document Type (Provider Letter)** to Provider Letter.
- **<u>STEP 8</u>**: Set **Template (Provider Letter)** to Provider Letter.

Configuration B	Behavior Prefs	Manage Pools Manage Proxy FYI Result Subscriptions		
General Message Reminder/Lette Consult Reques	er st	Saving To Patient's Chart Automatically attempt to save a reminder to a patient's chart Ask me to confirm the save to chart when: Only When Sending a Reminder		
		Defaults When Creating a New Reminder Template: Reminders	Document Type: Reminders	Manage Favorites
		Defaults When Creating a New Letter Document Type (Patient Letter) Patient Letter \checkmark Template (Patient Letter)	Document Type (Provider Letter) Provider Letter Template(Provider Letter)	Manage Favorites
	1	Patient Letter v Previous Results 1 v Patient Letter Default Action	Provider Letter Date Range for Previous Results 18 Month(s)	
		Print Now Ø Automatically Select Current and Previous Results Include Normalcy Indicator in Letter Retain the Editor Font for Letter]	Provider Letter Sections Header / Footer

Task Edit View Patient Cha	ert Links Notifications	Inbox	Help	
🚮 Home 🔜 Message Center 👫 Ge	En	Empty Trash		
Patient Location Inquiry Report	rting Portal 🔮 Schedule Ap	M	anage Ad Hoc List	
New Sticky Nate 😏 New Sticky I	lotes 🙀 Change 🗰 Suspe	M	anage Out of Office	
		м	anage Pools	
Message Center	M	Manage Preferences Manage Proxy		
Inbox Summary	M			
Johan Davis Davis		Q	uery Future Reminders	
Index Proxies Pools	Communicate •	Sh	Show Completed	
	B 1 1 1		0 . 0	

From the Office of Health Informatics Patient and Provider Letter Template Defaults April 17, 2025 Page 2 of 2

Updating Letter Headers/Footers

- **<u>STEP 1</u>**: Select **Header/Footer**.
- STEP2: Click Template dropdown, select Patient Result Letter Template.
- **<u>STEP 3</u>:** Insert practice name, address, phone, and fax beneath the Northern Light Health logo.
- **STEP 4:** Scroll to the bottom for signature, insert name/title or generic practice signature.
- **<u>STEP 5</u>**: Click **OK** to save changes.
- **<u>STEP 6</u>**: Click **Template** dropdown, select **Patient AdHoc Letter Template**.

Insert Fields Template

Patient Result Letter Template

ent Result Letter Template ent Adhoc Letter Template vider Letter Template

> Sincerely, Provider Test, DO

Preview

Delete

Patient

12

٢

Northern Light Health.

Practice Address City, State, Zip Phone (207)... / Fax (207) Provider

| 🗄 🔚 🌾 | 100% 💌 | ୩ 🕒

H 🗄 🗌

✓ Date

Cancel

Apply

Import Graphic

- **<u>STEP 7</u>**: Repeat steps 3-5.
- **<u>STEP 8</u>**: Click **Template** dropdown, select **Provider Letter Template**.
- **<u>STEP 9</u>**: Repeat steps 3-5.
- **<u>STEP 10</u>**: Click **OK** again to save changes.

Commit Progress × Saving letter template... Saving document types... Settings saved successfully. OK

ОК

<u>STEP 11</u>: Click **OK** to confirm that settings saved successfully.

<u>NOTE</u>: Steps 6-9 allows the information to be saved across all the Letter Templates.

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.