Second Opinion Enterprise – New Templates

Create a New Template

Log into the Enterprise site with a User account that has Administrator privileges and click *Manage*. The Manage section of the portal is used to create and manage Sites, Users and Templates.

Add, Sites, Users, Templates

In the Sites section, navigate to the Site that the new Template will be created in. In this example we are selecting the top most site, Second Opinion. With the *Template* icon selected, click the *Add* button, the new Template form will launch.

New Template Form

Start filling in the fields. For the most part, fields are self-explanatory. To help the user fill out the form, information tips appear next to the selected field. When finished, click the *Save Changes* button.

Template Types

There are several types of Templates, Referral, Consultation, General Notes, Consent, Discharge, and Other. If the same Template will be used for more than one category, the Template must be created in each category.

Template Content

The content for the Template can be typed in or copy & pasted from another source document such as Microsoft Word. There are two different designer views for the Content window, rich text and HTML. Below is the rich text designer view.

Below is the HTML designer view.

Assigned Specialties

Templates can be associated with select medical specialties or All.

Once the form is saved, the new Template is created. To create additional Templates for this Site, select the *Template* icon and click the *Add* button.

(This page is intentionally left blank)

For More Information or Technical Support Give Us a Call

Second Opinion Telemedicine Solutions, Inc.
20695 S. Western Ave., Suite 200
Torrance, CA 90501
310-802-6300
www.sotelemed.com
corp@sotelemed.com