



### Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

# Using General Letters

Last Modified on 06/26/2020 2:37 pm EDT


Version 20.4

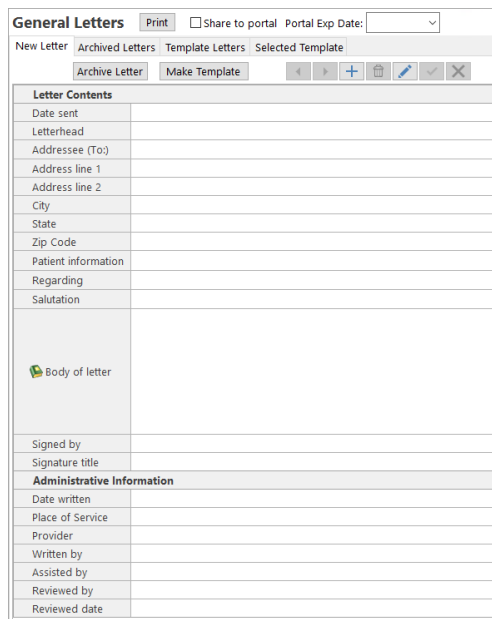
**Path: Clinical, Practice Management, or Billing tab > Patient Chart button > General Letters**

## Overview



General Letters are used to write a letter on behalf of a patient. Typical uses for General Letters include when you need to communicate a patient's PE class restrictions, or if the patient was advised to miss school without being seen in the office. General Letters can be archived for the patient or saved as a template for later use. They can be printed or sent to a patient's active portal account. General Letters can only be sent to the portal by practice staff who have an associated user account on the IntelliChart Practice Portal.

## Creating a General Letter

1. Navigate to the patient's General Letters by following the path above.
2. Click the **Add**  button.





The screenshot shows the 'General Letters' form interface. At the top, there are tabs for 'New Letter', 'Archived Letters', 'Template Letters', and 'Selected Template'. Below the tabs are buttons for 'Archive Letter' and 'Make Template', along with navigation icons. The form is divided into two main sections: 'Letter Contents' and 'Administrative Information'. The 'Letter Contents' section includes fields for 'Date sent', 'Letterhead', 'Addressee (To:)', 'Address line 1', 'Address line 2', 'City', 'State', 'Zip Code', 'Patient information', 'Regarding', and 'Salutation'. The 'Body of letter' field is a large text area. The 'Administrative Information' section includes fields for 'Date written', 'Place of Service', 'Provider', 'Written by', 'Assisted by', 'Reviewed by', and 'Reviewed date'.

3. In the **Date Sent** field, use the drop-down menu to select the date the letter is being printed or sent to the portal.
4. Enter the **Addressee (To:)** information from one of the options below.
  - Click the **Select from Address book** button  if you are sending a letter to an entry in your Address Book.
  - Click the **Copy Patient's Address** button . This copies the patient's information into the Addressee (To:) field.
  - Type the information in the Addressee (To:) field.
5. Click into the **Patient information** field and click the **Pat Name** button (optional). This button is only available when the letter is not addressed to the patient.
6. Click into the **Regarding** field and enter the **purpose of the letter** or click the **Phrase Construction** button.

7. Click into the **Salutation** field and enter the **salutation of the letter** or click the **Phrase Construction** button.
8. Enter the letter content in the **Body of letter** field.



**Note:** Phrase Construction is available in several fields in the General Letter Writer and is indicated by the **Phrase Construction** button . You may want to consider building your Phrase Construction library to suit the needs of your General Letter entries. For more information on Phrase Construction, [click here](#).

9. The **Signed by** field populates with the user creating the letter. Enter another **Staff Member** or **Provider** if necessary into that field.
10. The **Signature title** field is used to add the staff's title, such as Billing Manager, Office Manager, etc.
11. Click the **Save** button .
12. (*Optional*) If sending to the portal, complete the following:
  - A. Select the **Share to Portal** checkbox.
  - B. Use the **Portal Exp Date** drop-down to select an expiration date, if different from the default.
  - C. Click the **Print** button. The **Located in OP Reports** window is displayed.
  - D. Select **General\_Letter** and click **OK**.
  - E. The Print window is displayed.
  - F. Select the **Print to File** checkbox and ensure that **PDF File** is selected in the Type field.
  - G. Click **OK**.
13. Click the **Print** button.
14. The **Located in OP Reports** window displays, select **General\_Letter**, click **OK**.
15. Proceed with printing the letter.



**Note:** If sending to the portal, the letter is sent as a PDF and is available until the date selected. After the specified date, if the portal user attempts to view the document, they will receive a message informing them to contact the practice.

## Archiving a Letter

1. After saving your letter, click the **Archive Letter** button.
2. Click the **Yes** button in the Confirmation dialog box. The patient's archived letters can be found in the Archived Letters tab.



**Note:** To use an Archived Letter as a template for a new letter, click the **Archived Letters** tab, highlight the **letter** you wish to use and click the **Apply to Current Letter** button. Update the letter as needed.

## Saving a Letter as a Template

1. After saving your letter, click the **Make Template** button, the Template Letters tab is displayed.
2. Double-click the **Template**.
3. Enter a **Template Description** in the field and remove any patient specific information.
4. Click the **Save** button.

## Using a Template Letter

1. Click the **Template Letters** tab.
2. Select the **Letter Title** in the list.
3. Click **Use Selected Template** button.
4. Click the **Yes** button in the Confirmation dialog box.

## Delete a Template Letter

1. Click the **Template Letters** tab.


2. Double-click to select the template to delete
3. Click the **Delete** button.
4. Click the **Yes** button in the Confirmation dialog box.

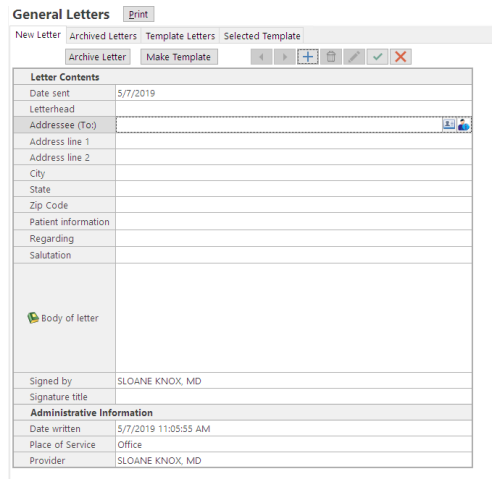
Version 20.3



## Overview

The General Letter can be used for writing a letter on behalf of a patient. It is especially handy when having to create a letter for a patient who has limited physical education class restrictions or for a patient who was advised to miss school without being seen in the office. For insurance company communications, the patient's insurance information can appear. General Letters can also be archived for the patient or made a template for later use.


## Creating a General Letter

1. Click the **Patient Chart** button.
2. Search for and select a **Patient**.
3. Select **General Letters** from the Communication section of the Window Navigation Panel.
4. Click the **Add**  button.




5. Enter the **Addressee (To:)** information from one of the options below.
  - Click the **Select from Address book** button  if you are sending a letter to an entry in your Address Book.
  - Click the **Copy Patient's Address** button . This copies the patient's information into the Addressee (To:) field.
  - Type the information in the Addressee (To:) field.
6. Click into the **Patient information** field and click the **Pat Name** button (optional). This button is only available when the letter is not addressed to the patient.
7. Click into the **Regarding** field and enter the **purpose of the letter** or click the **Phrase Construction** button.
8. Click into the **Salutation** field and enter the **salutation of the letter** or click the **Phrase Construction** button.
9. Enter the letter content in the **Body of letter** field.



**Note:** Phrase Construction is available in several fields in the General Letter Writer and is indicated by the **Phrase Construction** button . You may want to consider building your Phrase Construction library to suit the needs of your General Letter entries. For more information on Phrase Construction, [click here](#).

10. The **Signed by** field populates with the user creating the letter. Enter another **Staff Member** or **Provider** if necessary into that field.
11. The **Signature title** field is used to add the staff's title, such as Billing Manager, Office Manager, etc.

12. Click the **Save** button .
13. Click the **Print** button.
14. The **Located in OP Reports** window displays, select **General\_Letter**, click **OK**.

## Archiving a Letter

1. After saving your letter, click the **Archive Letter** button.
2. Click the **Yes** button in the Confirmation dialog box. The patient's archived letters can be found in the Archived Letters tab.



**Note:** To use an Archived Letter as a template for a new letter, click the **Archived Letters** tab, highlight the **letter** you wish to use and click the **Apply to Current Letter** button. Update the letter as needed.

## Saving a Letter as a Template

1. After saving your letter, click the **Make Template** button, the Template Letters tab is displayed.
2. Double-click the **Template**.
3. Enter a **Template Description** in the field and remove any patient specific information.
4. Click the **Save** button.

## Using a Template Letter

1. Click the **Template Letters** tab.
2. Select the **Letter Title** in the list.
3. Click **Use Selected Template** button.
4. Click the **Yes** button in the Confirmation dialog box.

## Delete a Template Letter

1. Click the **Template Letters** tab.
2. Double-click to select the template to delete
3. Click the **Delete** button.
4. Click the **Yes** button in the Confirmation dialog box.