

Zedmed templates overview

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Zedmed includes many types of templates that use different creation and management tools. This guide explains each template offering and its use cases.

Office templates

Used by office staff to write letters, print labels, perform mail merges and produce Operating Lists. Office staff write letters using the [Letters menu](#) in the patient record and [Operating Lists](#) are added via the Appointment Book.

Office Templates are created and updated in the **FRM Document** screen, accessed via **Office > WP Setup** menu or **Management > WP Setup**. The templates are FRM documents linked to MS Word documents (Mail Merge.) MS Word is required to use these templates.

To create, see [Managing Office Templates](#).

To use the RTF editor instead of Word, see [Managing Office RTF templates](#).

Clinical templates

Used by staff with Clinical access to create referral letters, letters, documents, assessments and care plans. Accessed from Quick Docs, the Referrals module and the Batch Letter Writer.

Created in **WP Templates**, which is used to store, modify, import and create clinical templates. WP Templates is also used to add templates to Quick Docs. Accessed from Clinical > Tools > Clinical WP Setup > WP Templates.

To use, see [Referral Letters](#), [CDM module](#), [Batch Letter Writer](#) and [Quick documents](#).

To create, see [Managing Clinical Templates](#).

Laboratory templates

Used by staff to print radiology and pathology referrals on laboratory paper. Accessed from the Referrals module's Radiology and Pathology tabs. Selecting a recipient laboratory from the Referrals module sets the template to be used, which prints the referral using the layout for the laboratory's paper.

Created and maintained by Zedmed as part of the Laboratory Subscription plan, which makes laboratory templates available for all Zedmed customers. Located in Clinical > Referrals (active encounter menu).

To use, see [Pathology referrals](#) and [Radiology referrals](#).

To select a laboratory's paper, see [Setup Clinical Address Book](#).

Examination templates

Used by practitioners to collect patient examination information. Done in the Clinical's Templates module, which has template screens for specific examination types.

Created using the **Template module**'s New/Modify options. Zedmed comes with an extensive set of examination templates. Located in Clinical > Templates (active encounter menu).

To use and create, see [Examination Templates](#)
