

exa-PACS · exa-RIS

# Feature Summary

## Email Templates

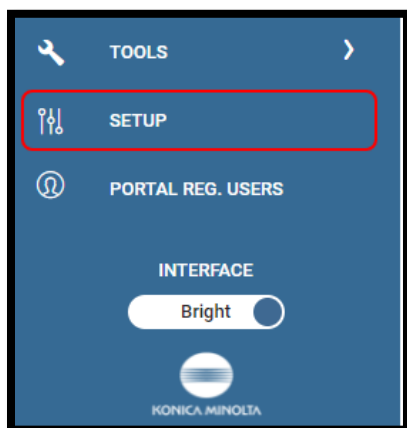
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## Create an email template

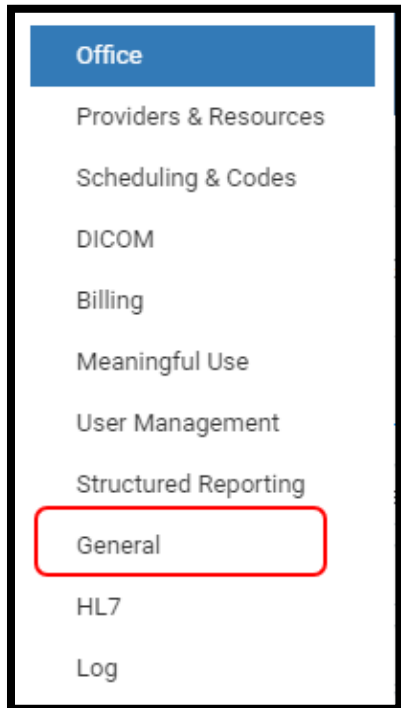
Email templates are typically used to send information by email such as provider report links, provider reports, Patient Portal registrations, and the contents of the Patient Appointment Confirmation screen.

Email templates *are not* used for study status notifications. Those templates are called *notification templates*. See feature summary, “Auto-Send Status Change Notifications.”

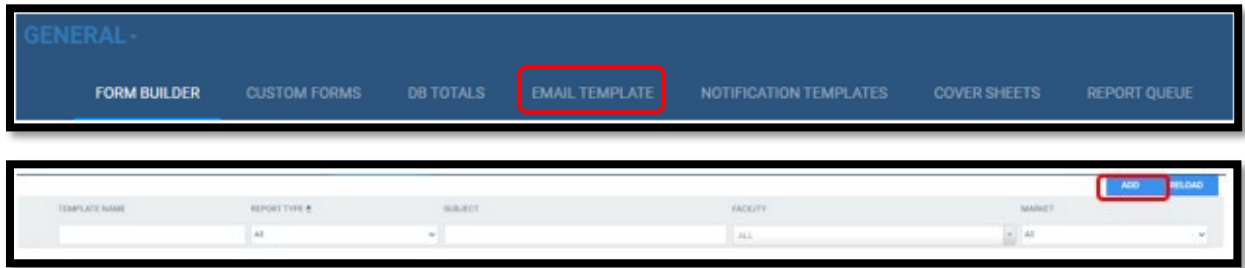
1. On the navigation (“burger”)  menu, select **SETUP**.



2. On the **OFFICE** menu, select **General**.

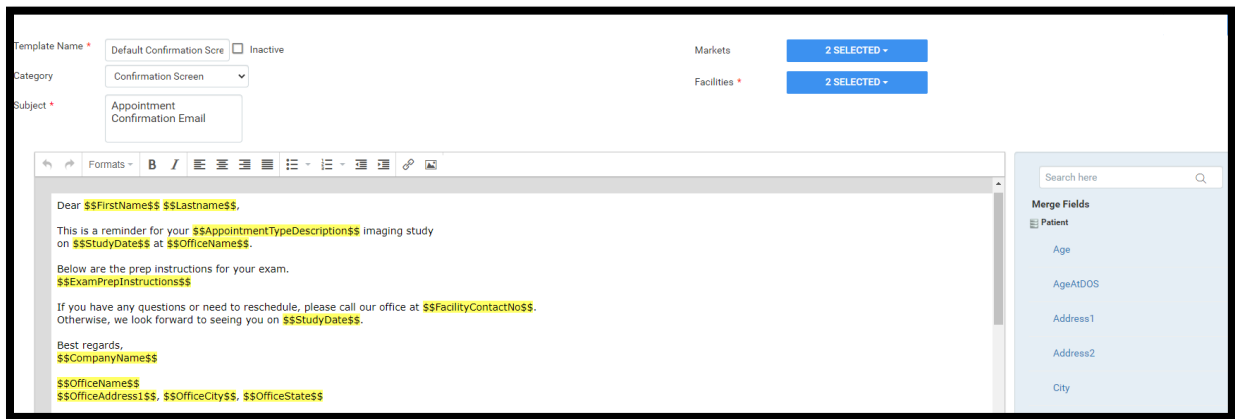
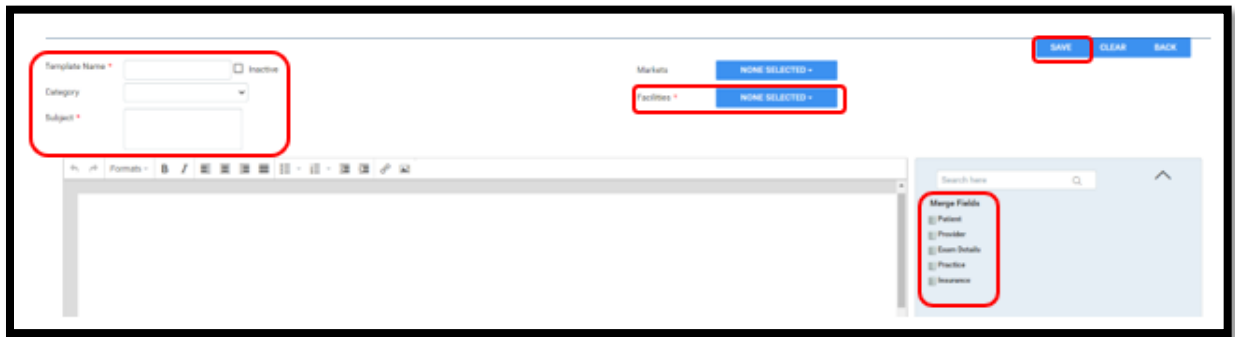


3. On the **EMAIL TEMPLATE** tab, select **ADD**.



4. Type or select the following:

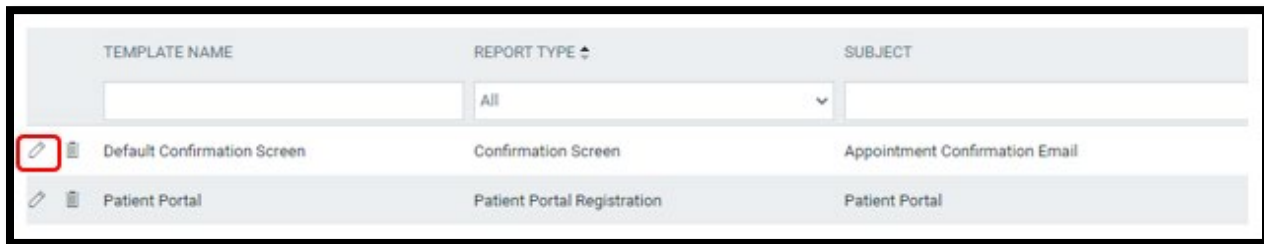
- Template Name
- Category
- Subject
- Facility
- Merge Fields







5. Select **SAVE**.

## Edit an existing form

1. Select the edit (pencil) button of the form you want to modify.

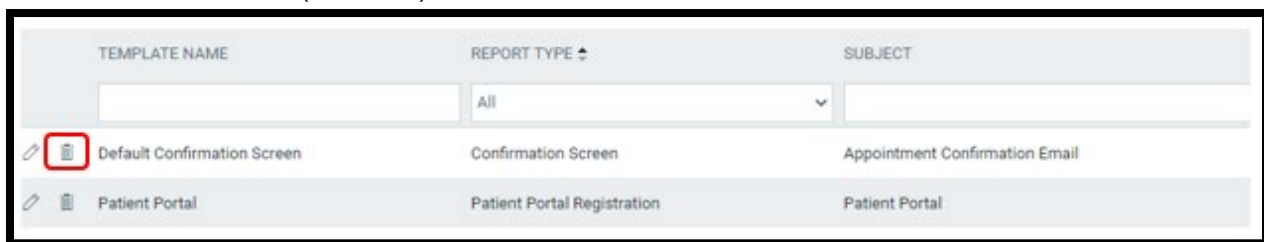






| TEMPLATE NAME   | REPORT TYPE                 | SUBJECT                        |
|---|-----------------------------|--------------------------------|
|   | All                         |                                |
|   Default Confirmation Screen | Confirmation Screen         | Appointment Confirmation Email |
|   Patient Portal              | Patient Portal Registration | Patient Portal                 |

2. Make the necessary changes to the form, and select **SAVE**.

## Delete an existing form

1. Select the delete (trash can) button of the form to delete.



| TEMPLATE NAME   | REPORT TYPE                 | SUBJECT                        |
|---|-----------------------------|--------------------------------|
|   | All                         |                                |
|   Default Confirmation Screen | Confirmation Screen         | Appointment Confirmation Email |
|   Patient Portal              | Patient Portal Registration | Patient Portal                 |

2. Select **YES**.

