

## New Cover Page Template for Provider's

The PEI EMR Team have created a cover page specifically for Providers to auto populate their own phone/fax numbers into the cover page. [This was created for staff that work in multi-provider and multi-phone/fax number clinics.](#)

### Steps:

1. Add your phone/fax numbers into your profile information\* (\*see pic below).
2. To set the cover page to your defaults, add a new letter to a test patient (e.g. Testy Pants, MRN: 77788899). You do not need to have any text etc. in the letter, nor does it require a signature or any other info.
3. From the options at the bottom of the new letter, select PDF. This will bring up the PDF settings menu. \*If the PDF Settings menu does not open, please click on your profile, and go to the Skipped Dialogs section, and unselect PDF Settings.
4. Settings should be:
  - a. Location: My Current Location.
  - b. Phone/Fax: My Phone/Fax (if exists).
  - c. Cover Page: Cover Page Providers Info.
5. Select the tickbox for 'Save as my Default PDF settings'.

Optional: You may choose to click the tickbox for 'Do not open this dialog by default' to avoid seeing the menu every time you create a pdf. If you ever need to manage your PDF settings again, please go to your profile page, and under the Skipped Dialogs section, unselect PDF Settings.

Once you generate the PDF, your settings will be applied\* (\*see pic below for PDF settings).

The screenshot shows the 'PDF Settings' dialog box. It contains three dropdown menus: 'Location' (My current location), 'Phone/Fax' (My Phone/Fax (if exists)), and 'Cover Page' (Cover Page Provider's info). Below these is a 'Cover page autofill templates' section with a search bar containing 'Patient Data' and a 'Select template' button. There are several template buttons: 'Greater Charlottetown Patient Me...', 'Janet McQuaid - EMR Advisor', '2024/Oct/16', 'No Appointment Selected', 'No Recipient Selected', 'No Referral Selected', 'No CC Recipients Selected', and 'No Lab Identifier Selected'. At the bottom, there are two checkboxes: 'Do not open this dialog by default.' (checked) and 'Save as my default PDF settings.' (checked). The dialog has 'Close' and 'Generate PDF' buttons at the bottom.

## Adding Phone/Fax numbers to your Profile Information

### Profile Information

FIRST NAME *	MIDDLE NAME	LAST NAME *
<input type="text"/>	<input type="text"/>	<input type="text"/>
TITLE	DISPLAY NAME * ⓘ	CREDENTIALS
None ▾	Full name as it appears on legal documents	<input type="text"/>
		<input checked="" type="checkbox"/> Include credentials in footers
EMAIL *	GENDER	
email@address.com	<input type="text"/>	
POSITION	PHONE NUMBER	FAX NUMBER
<input type="text"/>	+1 (xxx) xxx-xxxx	+1 (xxx) xxx-xxxx
TAX NUMBER	LICENSE NUMBER ⓘ	BILLING NUMBER ⓘ
<input type="text"/>	<input type="text"/>	<input type="text"/>