



Installing the eReferral template in Clinic to Cloud

1. Download the “Clinic to Cloud eReferral Template” from www.peninsularespiratory.com/pftReferral.html
 - Be sure to “**Save**” the file to a location you will be able to find later (e.g. the Desktop)
 - Open the file and copy all of the text to the clipboard with “**Control+C**” on windows or “**Command+C**” on a Mac.
2. Open Clinic to Cloud and navigate to **Settings (gear icon) > Templates**.
3. Click the “Add Template” button, select “Referral” under the ‘Type’ option, and enter “**Peninsula Respiratory Referral**” as the name.
4. Click the “View HTML” icon (see screenshot), paste the previously copied text and click “Update”.

The screenshot shows a form for adding a template. At the top, there is a 'Name:' label with a red asterisk. Below it is a text input field containing 'Peninsula Respiratory eReferral' and a checkbox labeled 'Default'. Below the form is a rich text editor toolbar with various icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, video, table, and a code icon. A red arrow points to the code icon. To the right of the code icon is a dropdown menu currently set to 'Paragraph'. Below the toolbar are two dropdown menus for font and size, both set to '(inherited)'. At the bottom right of the toolbar is a 'View HTML' button.

5. Scroll to the bottom of the page and click the “Create” button.