

Importing a Template into Medical Director

NOTE: Do not open the template file in Microsoft Word as this will corrupt the template file. Templates will usually be rich text files .rtf.

1. Right mouse click on the file you would like to save as a template. Select **Save Target As** and save the file where you want to save it e.g. on the hard drive of your computer or the desktop. Select **Save**.
2. Within medical director you can access the letter writer from within a patient file or from the main menu by selecting **Tools** then **Letter Writer**.
3. When in **Letter Writer** select **File \ Modify Template**. This will bring up the dialog box. From this list select **Blank Template** and then **Open**.
4. Select **File \ Import**.
5. Navigate through to locate the file you saved in step 1. Select the template file by clicking on it and select **open** or **double click on it**.
6. Save the template by selecting **File \ Save as Template**.
7. Type in the exact name for the template and click on **All Users** or **Current User** depending on who has access to the template.
8. Select **Save**.
9. The template will now appear in the **User Defined tab** in alphabetical order.

Using Templates in Medical Director

1. To use a template you must use Letter Writer once in a patient record.
2. Select **File \ New**.
3. Highlight the template to be used in either the **User Defined / supplied or summaries tab** and select **OK**.
4. Respond to any prompts for addresses etc.
5. Check the completed document and make changes as necessary.
6. To save the document in the patients file select **File \ Save**.
7. Complete or modify the **Letter Details** and select **Save**.
8. To print, select **File \ Print**.