

IMPORTING, MODIFYING AND CREATING TEMPLATES IN MEDICAL DIRECTOR

PLEASE NOTE – Before uploading a template into Medical Director (MD) save the template to your desktop – it is easier to find it from this location.

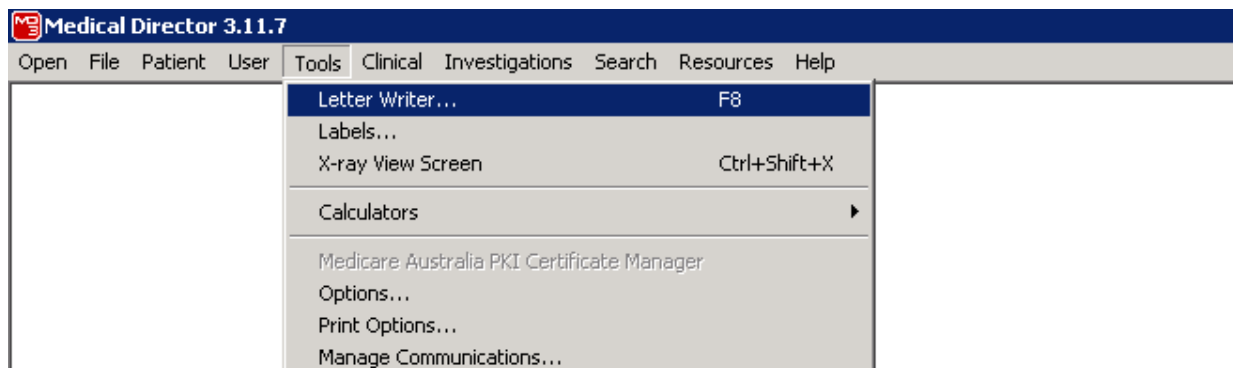
*To do this right click on the link and choose **save target as***

DO NOT OPEN THE TEMPLATE FILE BEFORE IMPORTING – as the templates are in a **Rich Text Format** they will corrupt if they are opened before importing and therefore will not work properly when you try to use them.

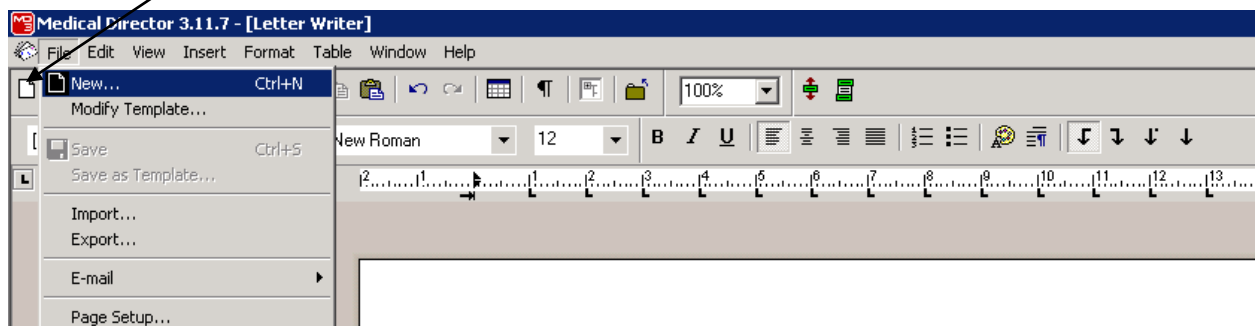
If you want to make sure it is the right template save a copy and then you can open the copy. To do this right click on the icon of the template choose copy – then right click anywhere on your desktop and choose paste. AFTER IMPORTING YOU CAN DELETE THESE FROM YOUR DESKTOP

INSTRUCTIONS TO IMPORT A TEMPLATE

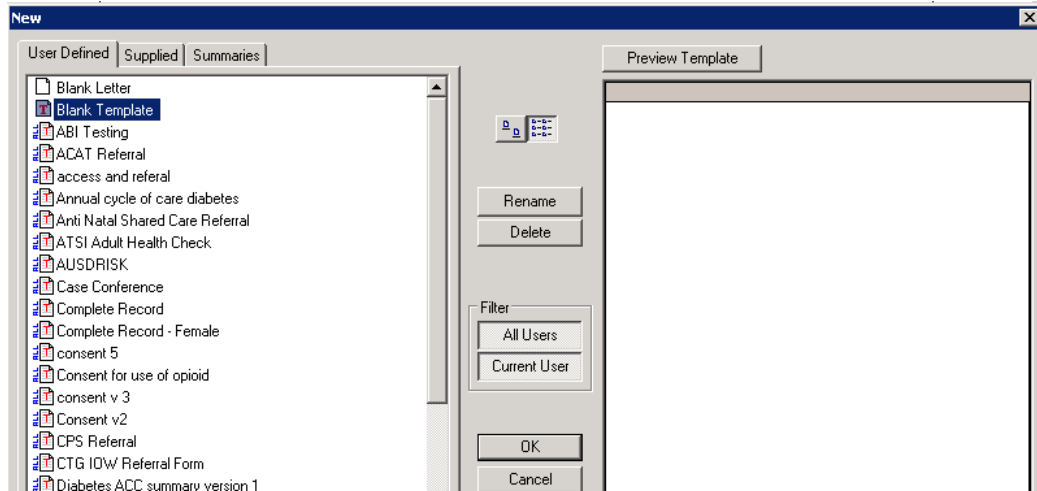
1. From the main screen select **Tools – Letter writer** or use the shortcut key **F8**



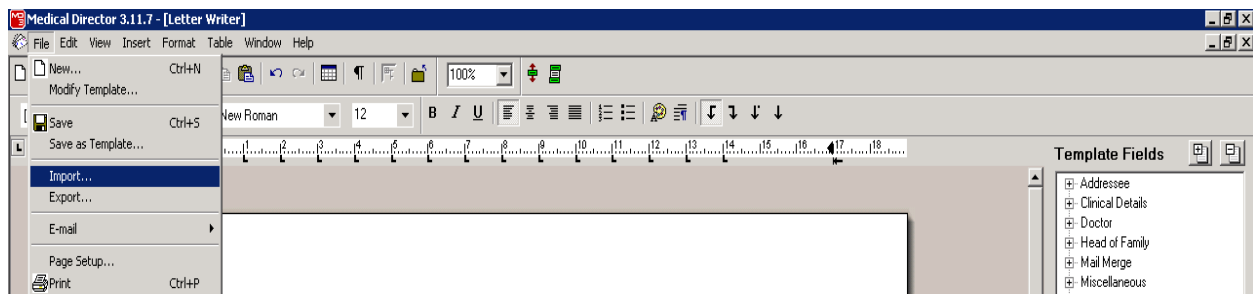
2. A word document window will open select **File – New** or **Ctrl+N**
Or click on the **New letter** icon



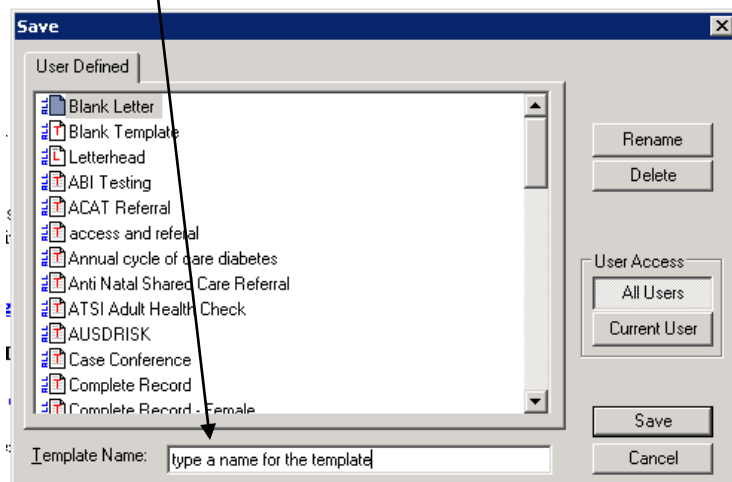
- Choose **Blank Template** and click on **OK**



- A blank document opens with a Templates field window on the right of the screen
Go to **File – Import**
Find the template where you saved it and click on **OK**

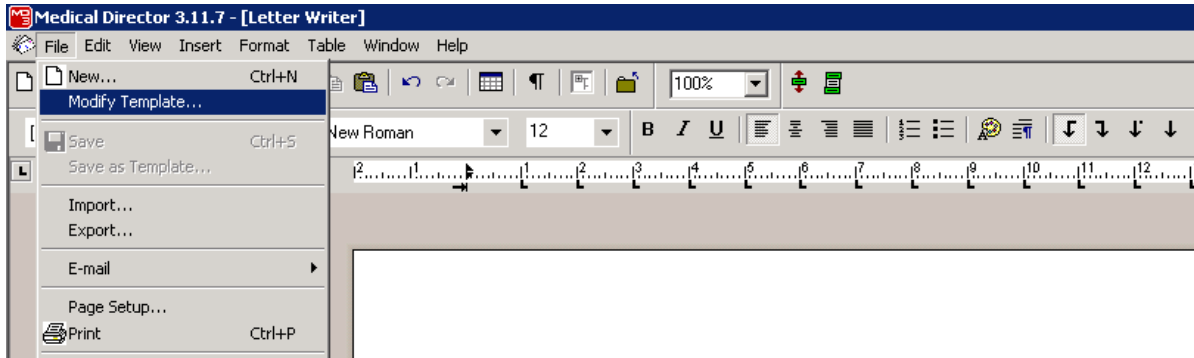


- If you are happy with the template – click on the **Save** icon
The save window appears – type in a suitable name for the template in the **Template Name** field and click on **Save**

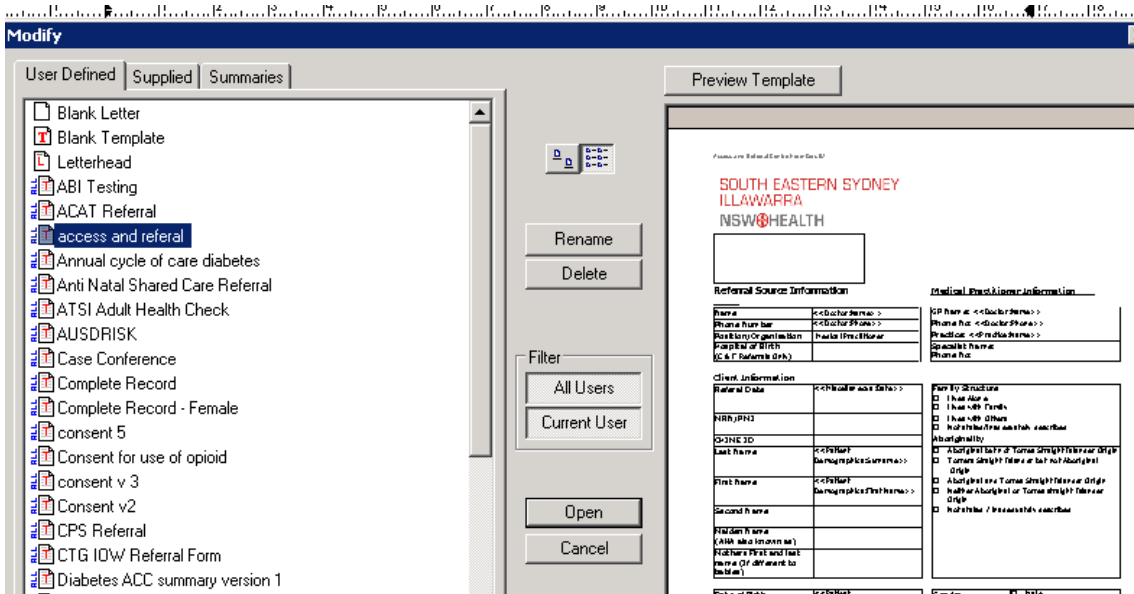


INSTRUCTIONS FOR MODIFYING AN EXISTING TEMPLATE

1. As for step 1 above.
2. A word document window will open select **File – Modify**



3. Choose the Template that you wish to modify and click on Open



4. Modify Template to suit and then click on the **Save** Icon.

If you need to change or Add to the self populating fields please see instructions below on creating templates.

INSTRUCTIONS FOR CREATING A NEW TEMPLATE

Follow steps 1, 2 & 3 from above instructions

Type the body of your Document as you would with a word document – you can format and add tables etc the same as with any word document.

When you are ready to add your self populating fields make sure that your cursor is in the position where you would like to add the field.

Then find the field that you wish to add to your document from the list of **Template Fields** at the right of your screen.

You can either **double click** on the field or click once to highlight then click on **Insert Field** at the bottom of your screen.

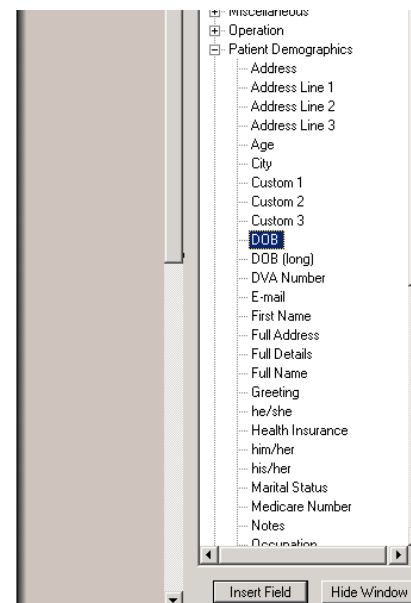
Dear <<Patient Demographics:Full Name>>

please follow these instructions carefully and they will show in detail how to create new templates

you are able to add self populating fields that can be used for patients names addresses DOB etc

you are also able to add tables etc.

<<Patient Demographics:Full Name>>		
<<Patient Demographics:Full Address>>		



I like to bold the self populating fields as this then bolds them in the finished document so that those sections of the document stand out. This is personal preference and may not suit all documents.