

Importing Templates into Medical Director

Templates are usually in the form of a .rtf (Rich Text File) file. THEY MUST NOT BE OPENED EXCEPT IN MEDICAL DIRECTOR.

To import them into Medical Director:

1. Right-mouse click on the file and select **Save Target As**. Go to the folder or location on the hard drive of the computer where you want to save it, and select **Save**.
2. Start the Letter Writer module (either from the main menu or from within a patient record by selecting **Tools > Letter Writer** from the menu bar)
3. Click **File > Modify Template** from the Menu Bar
4. Select **Blank Template**
5. Click **Open**
6. Select **File > Import** from the Menu Bar.
7. Find and select the template file to be imported, and either double-click on it or press 'open'- this will import the template into Medical Director
8. Modify the layout if required to suit the page
9. Save the template by selecting **File > Save as Template** from the Menu Bar
10. Type in a new name for the template and click on **All Users** or **Current User** depending on who is to have access to the template
11. Click **Save**
12. This will save the template under the **User Defined** tab

Using Templates

To create a letter or document based on a template, you must open Letter Writer from within a patient record.

1. Select **File > New** from the Menu Bar

2. Highlight the template to be used under the **User Defined, Supplied** or **Summaries** tab and click **OK**
3. Respond to any prompts for addressees, dates, drop-down boxes, etc
4. Check the completed letter or document and make any changes required
5. Save the letter in the patients file by selecting **File > Save** from the Menu Bar or clicking the Save icon on the Toolbar
6. Complete or modify the **Letter Details**
7. Click **Save**.
8. To print the letter, select **File > Print** from the Menu Bar, or click the **Print** icon on the Toolbar.

Modifying Templates

To make changes to a template:

1. Open Letter Writer from the main menu or from within a patient record
2. Select **File > Modify Template** from the Menu Bar
3. Select the template to be changed (or Blank Template to create a new one)
4. Make the required changes to the template
5. Save the template by selecting **File > Save as Template**
6. Either save the template with the same name or type a new name and click **Save**.

To insert Auto Text into a letter or document

1. Position the cursor where you want the text and type the shortcut
2. A popup box with the Auto Text will appear. Press **Enter** to add the Auto Text to your document. To ignore the Auto Text, keep typing
3. If you cannot remember the shortcut, select **Edit > Auto Text** from the Menu Bar, highlight the shortcut from the list, and click **Insert**.