


Downloading & 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 on the hard drive of the computer where you want to save it and appropriately name the file.
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 file to be imported
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 in Medical Director

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**.

To print the letter, select **File > Print** from the Menu Bar, or click the **Print** icon  on the Toolbar.

