

Importing document templates into Medical Director

Medical Director can import document templates with the extensions: RTF (Rich Text Format), .doc (Microsoft Word) as well as a few other formats.

To add a template into Medical Director:

Important: Do not open the template at this point as this may corrupt the file and prevent the successful template import.

1. Click on Link ⇒ Save – choose Desk top so you can find it easily.
2. Start Medical Director
3. Log in and go to main menu (do not enter a patient file)
4. Select **Tools, Letter Writer**
5. Select **File, Import**
6. Click on the location down arrow, find and click on the **Desktop**
7. Locate and click once on **My Template** filename, ensure that the file type is either RTF or .doc and click **Open**.
8. From the **File** menu select **Save as template**
9. A “template detail” box will appear. Type in the name you wish to identify the template with (hint: the templates list in alphabetical order) and tick the box “available to all users” if you wish to share the template. Click **Save**.
10. Click once on one of the fields <<xxxxx.yyyy>> and if they turn to a grey background then the fields have successfully transferred across. You will still need to check your template thoroughly using a test patient to ensure all fields populate correctly.

To test a new template in Medical Director:

1. Open a test patient file
2. Open Medical Director
3. **Tools, Letter Writer**
4. **File, New** select your template and **Open**
5. Scrutinise all fields to check that they have populated correctly.
6. If not, you will need to modify your template.
7. Close and Save your open template. Close patient file.
8. follow Modifying Templates procedure.

Modifying Templates:

1. From the **File** menu select **Modify Template**.
2. Make any changes you required. Click on and delete greyed fields that are not populating and re-insert them from the drop down menu on the right hand side of MD. (Use **View, Data Toolbar** if this is not automatically displayed.) You can also add new fields to your template and alter layout and sentences at this point, if required.
3. Once modifications are complete, from the **File** menu select **Save** to overwrite the previous version or if you wish click **Save as Template** to save a different version with a new name.
4. Re-test your template by opening test patient. Repeat any modification steps necessary until template is operating as required. You may like to print a letter using the template in order to fully test its functionality.

Did this procedure work for you? If not, retry above steps and remember

- Do not open your template document in a website, from the rewritable disk drive, from an email or on the hard drive
- Check the file extension of your template = RTF or .doc
- Remember to use **Save as template** not Save as (file).