How to import and use a template in Medical Director

The template feature in Medical Director (MD) enables documents to be imported into MD with preset fields for patient demographic data and some clinical details. For example, the COPD Action Plan (Australian Lung Foundation) template has been developed to include some preset fields and some fields that require manual input by the GP. It can be used in MD version 2.88 and above.

Templates can be completed for different patients and saved to each patient record, without changing the original template.

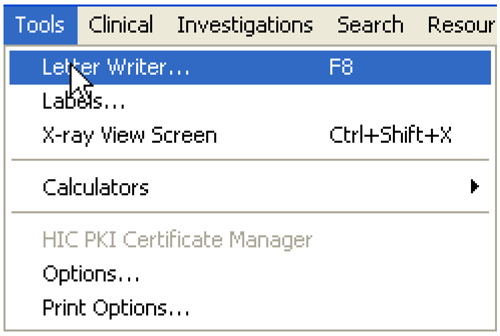
Saving the template to your computer from a web site, email or CD

Note: Do not open the template in Microsoft Word as it will not work in MD once it has been opened

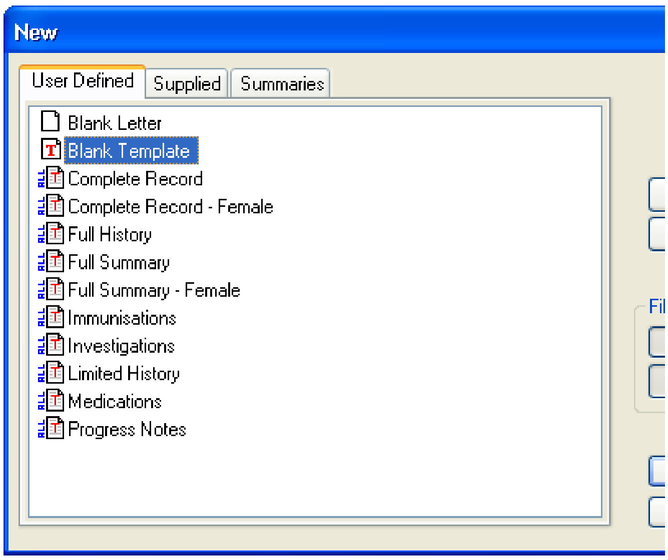
1. Right mouse click on the template you want and select “Save Target as…” or “Save as…” The template must be saved as a rich text file, ‘rtf’ file.
2. Save it to a convenient folder but remember where you saved it as you will need to find it again.

Importing the template into MD

Note: all patient records should be closed



3. Go to the main menu Select: Tools then Select: Letter Writer.
4. Select File > New. The New window is displayed.



5. Under the tab *User Defined*, double click on Blank Template.
6. Once the Blank Template is displayed, select File > Import.
7. Navigate to the folder where you saved the template in step 2 above. Select the template and double click on it.

8. Select File > Save as Template. The Save window is displayed.
9. Enter a name for the template and click the Save button. You can usually choose your own naming conventions for templates. The template is now ready for use. The window can be closed.

Using and saving the template for a patient

1. The patient’s record should be open.
2. Go to Tools > Letter writer
3. Open a new file: File > New
4. Select the template required and click “OK”
5. The template should now be open for use, and patient information can be added.
6. The template can be saved in MD: File > Save > Name of document (note: do not need to complete the “TO” field).
7. The template may be updated at a later time.

Updating patient details in a saved template

1. The patient’s record should be open.
2. Go to the “Letters” tab
3. In the left hand panel, double click on the template to be updated.
4. The document will be opened in Letter Writer window. Make any necessary changes and save template (as above - point 6).