

## IMPORTING A TEMPLATE INTO MEDICAL DIRECTOR

## NOTE: PLEASE DO NOT OPEN THE DOCUMENT IN WORD AS THIS MAY CORRUPT ANY TEMPLATE FIELDS.

When downloading from our website, select 'Save as' rather than opening the document and saving.

## Importing the template:

1) Right click on the link and select Save Link As

Open link in new tab	
Open link in new window	
Open link in incognito window	N
Save link as	
Copy link address	

2) Select a location to save the template (e.g. Desktop) then press **Save**.

		Save Attachment					×
						p	,P
Organise 🔻 Ne	w f	blder				•== •	(?)
0 Microsoft Outle	^	Name		Date	modified	Туре	S
		🐌 ACL		19/09	)/2015 4:18 PM	File folder	
🖳 This PC		퉬 PIR Projects		2/03/	2016 8:49 AM	File folder	
膧 Desktop		🐌 Completed Tasks		8/03/	2016 3:44 PM	File folder	
Documents		퉬 Chris Care CoordinationRebranding Assi		7/04/	2016 11:13 AM	File folder	
鷆 Downloads		퉬 Judy		7/04/	2016 6:55 PM	File folder	
🚺 Music		퉬 Timesheets		8/04/	2016 10:41 AM	File folder	
📄 Pictures		퉬 REPORTING		13/04	/2016 10:18	File folder	
📑 Videos		퉬 Best Practice Templates		13/04	/2016 12:13	File folder	
🊢 OSDisk (C:)		Pics for instructions		13/04	/2016 12:10	Microsoft Word	I D
DRIVERS							
🚹 Image	۷	<					>
File name:	М	edical Director Instructions					~
Save as type:	М	crosoft Word Document					~
) Hide Folders		т	ool	s 🔻	Save	Cancel	

Do not open the document as this will cause issues with the template fields and formatting



3) Open Medical Director. Go to Tools and select the Letter Writer.



4) Go to File and select New.



5) Choose **Blank Template** then press **Ok**.





6) Go to File and select Import.



7) Locate the template from your desktop (or other location), **click** on the file and press **Open** (The template will display with the inbuilt fields)



8) The template will now open in a new screen. Go to File and select Save as Template.

File	Edit View														_
_		Insert	Format	Table	Window	Help									
ים ם י	√ew ∕lodify Templa	te	Ctrl+N	A	<b>@</b>   🗠	CH	∎   ¶	<b>™</b> F	1	1	00%	•	ŧ		
[ 🔒	iave		Ctrl+S				• 12		•	В	7 <u>U</u>	F	Ξ	∃	
	Save as Templ	ate				1I	۹۱۹			15		l?.		l <sup>8</sup>	19
] E	mport Export				-				-		-			-	
E	E-mail			+											
	Page Setup Print Preferences Close		Ctrl+P		PC( Ref	CSS erral	ocia Forr	<b>al P</b> m –	res He	e <b>cri</b> l alth	bing 1 Pr	g <b>Pi</b> acti	i <b>lo</b> 1 itio	: nei	r



9) Type in the **Template Name** and click **Save**.

Save	×
User Defined	1
a Blank Template	Rename
ẩĽ Letterhead ≇1 Moving Practice Location ≇1 Referral - Obstetric & Gynae	Delete
	User Access All Users Current User
Template Name: Social Prescribing Referral Form	Save

The template has now been imported into Medical Director.