Importing Templates into Medical Director 3

WARNING: Do not open or modify/edit templates in Microsoft Word before uploading to Medical Director, it will corrupt the template tags – Medical Director templates can only be modified in Medical Director.

For templates downloaded from our Website

1. Click on the template, a pop up should appear asking you to save it.

2. In the pop up, select desktop and select save. **Do not open the file.**
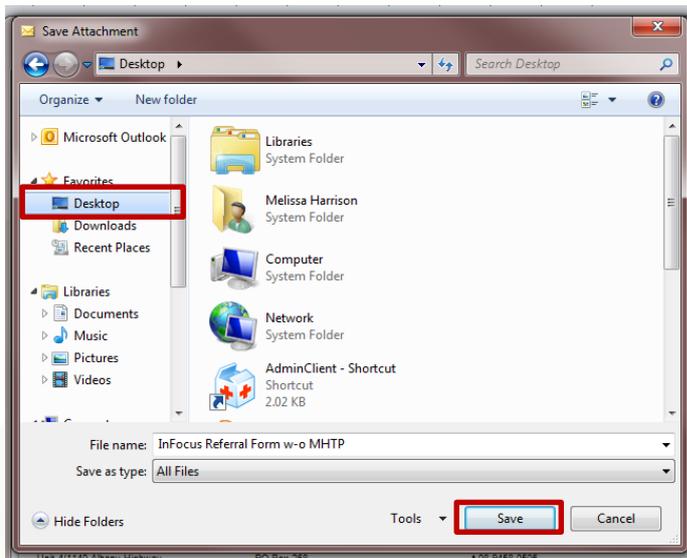
Importing a template

1. On the main screen of Medical Director (not in a patient file), select Tools → select Letter Writer
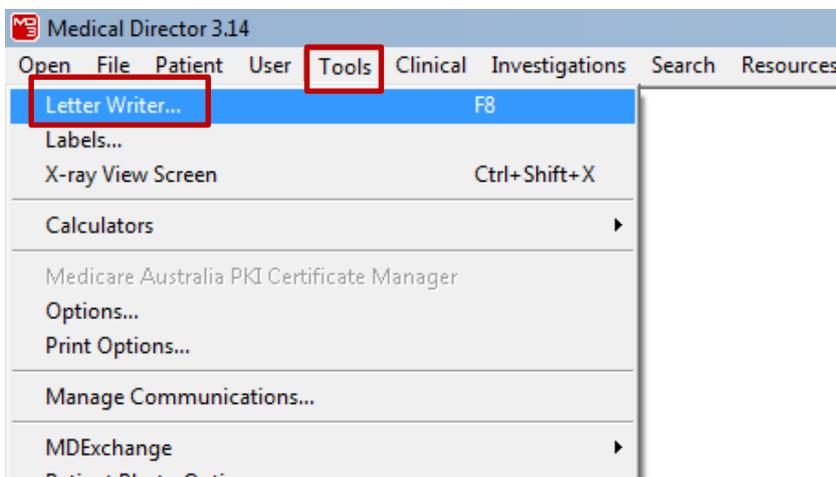
2. When in Letter Writer, select File → select Modify Template
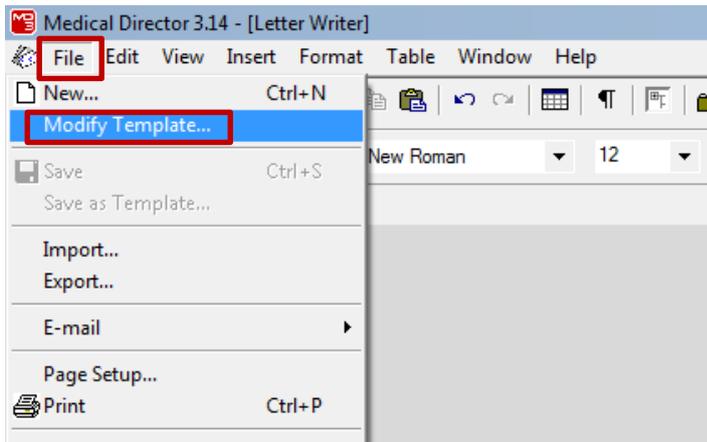
3. In the Modify pop-up, select Blank Template → Select Open
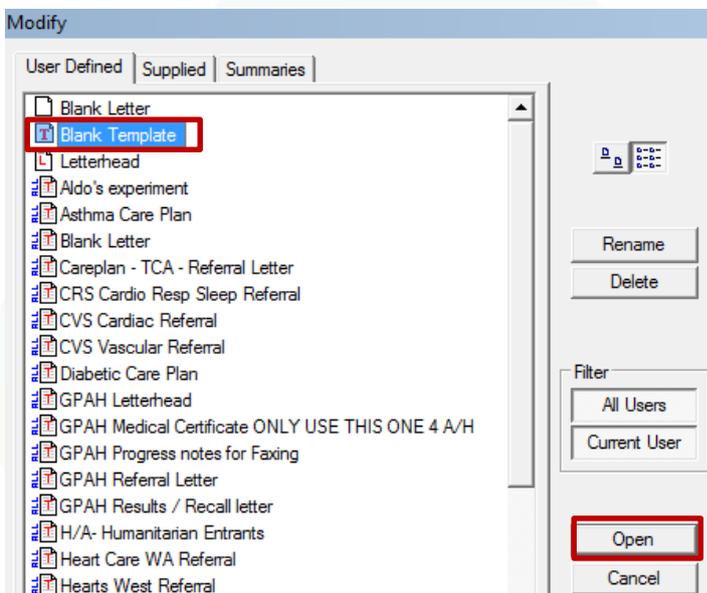
4. When returned to Letter Writer view, select File → Select Import
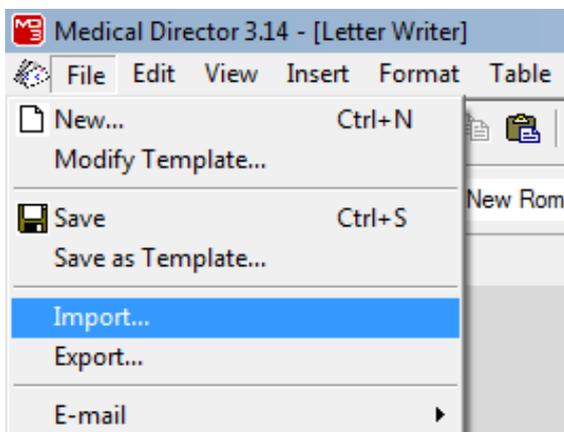
5. Navigate to template location (desktop) → Select Open
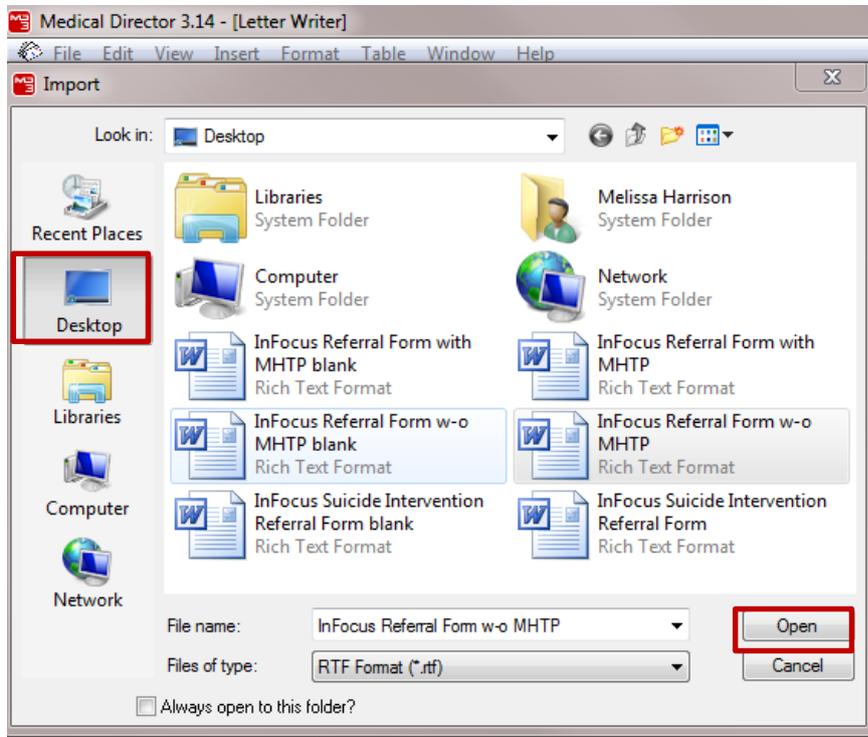
Saving the template

1. In the Letter Writer view, select File → Save as Template → Choose file name
   (**recommended name**: InFocus Referral Form w MHTP <u>OR</u> InFocus Suicide
   Intervention Referral Form <u>OR</u> InFocus Child (0-12) Referral Form) → click Save
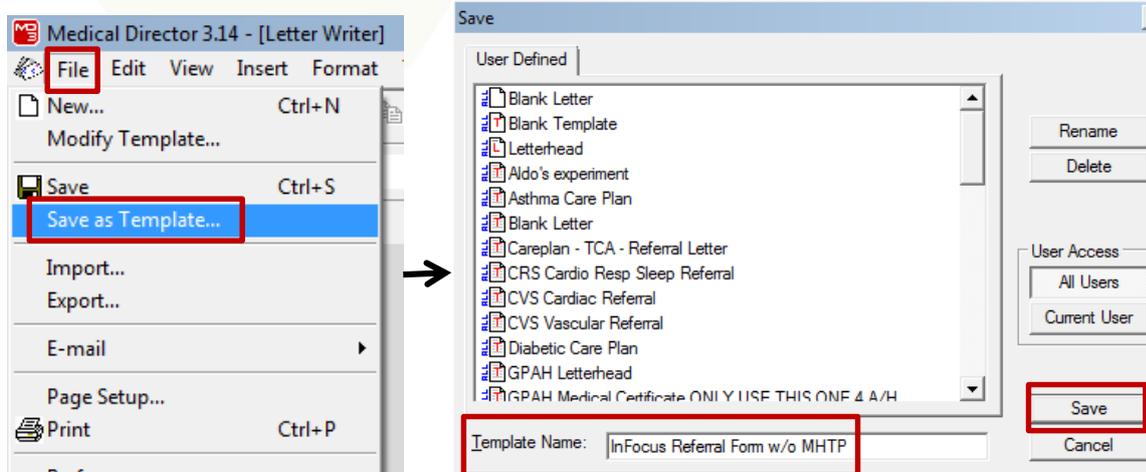
Using the template

1. When in the patient file, select Tools → select Letter Writer

2. When in the Letter Writer view, select File → New
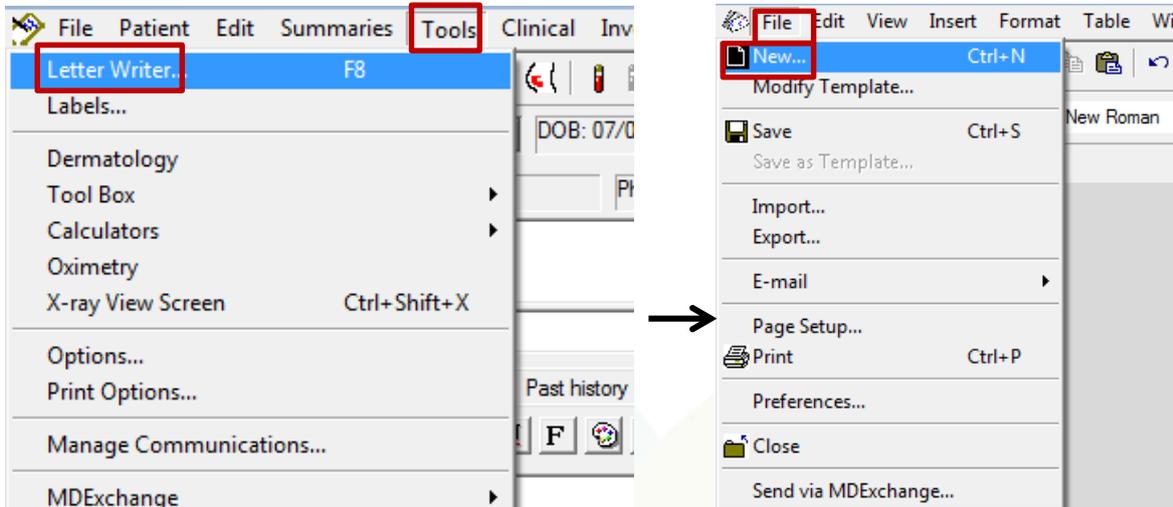
3. In the New pop-up, scroll through the list and select InFocus Referral Form w MHTP template → select OK