



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.

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Importing a template

 On the main screen of Medical Director (not in a patient file), select Tools → select Letter Writer



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2. When in Letter Writer, select File \rightarrow select Modify Template

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3. In the Modify pop-up, select Blank Template \rightarrow Select Open



4. When returned to Letter Writer view, select File \rightarrow Select Import



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5. Navigate to template location (desktop) \rightarrow Select Open

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Saving the template

 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



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Using the template

- 1. When in the patient file, select Tools \rightarrow select Letter Writer
- 2. When in the Letter Writer view, select File \rightarrow New

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3. In the New pop-up, scroll through the list and select InFocus Referral Form w MHTP template → select OK

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