

Importing Templates into Clinical Software

NOTE: Do not open templates in Word, as this can disable template fields.

- a) Right-click on the template.
- b) Save the template to your Desktop as an **.rtf file**.
- c) Import the template by following the instructions below.

Medical Director

- Open Medical Director, and then go to **Tools > Letter Writer**.
- From the File menu, select **File > New**
- Select **Blank Template** from the drop-down list and click **OK**.
- From the File menu, select **Import**.
- Browse to the Desktop or wherever you saved the template .rtf file.
- Select the file and click **Open**.
- Adjust the margins if necessary.
- From the File menu, select **Save as Template**.
- Type an appropriate name and click the appropriate **User Access** button for making it available to yourself only or all users.
- Click on **Save**.

The template is now available for use through **Tools > Letter Writer** using **File > New** or selecting the **Letter Writer** icon in the patient notes screen and selecting from the drop-down list.

Best Practice

- Open Best Practice and select **Utilities > Word processor**.
- Click on **Templates > Import template**.
- Browse to the Desktop or where you saved the template .rtf file.
- Select the file and click **Open**.
- Adjust the margins if necessary.
- From the File menu select **Save as**.
- Type an appropriate name and click the appropriate **User Access** button for making it available to yourself only or all users.
- Click on **Save**.

The template is now available for use through **Utilities > Word Processor** using **File > New document** or the New Letter icon in the patient notes screen and selecting from the drop-down list.