# How To Import and Use Templates Within Medical Director Software

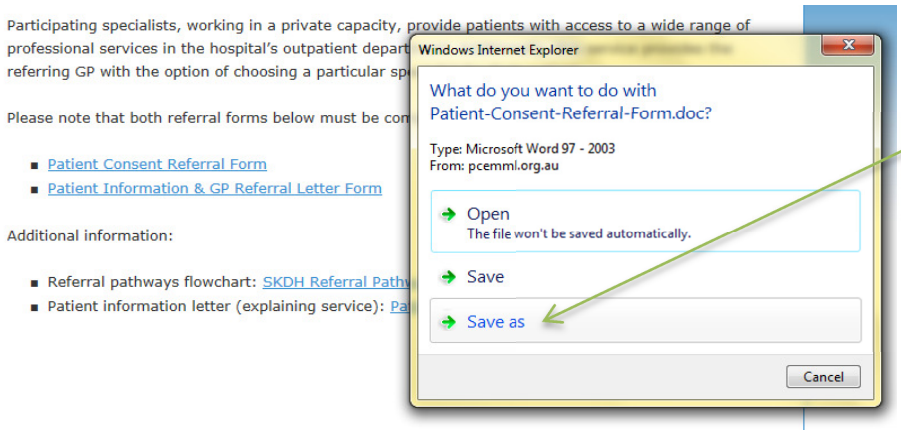
**Please note there are three parts to these instructions. Part 1 and 2 are only required for a first time import of the template.**

**Once the template has been imported only Part 3 is required, 'How to use a template within a patient record'**

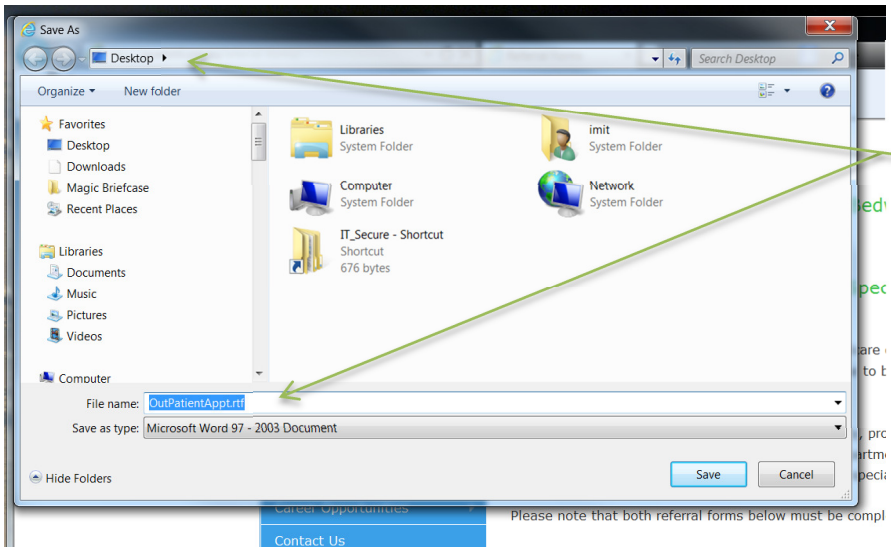
**Part 1 – How to import a template**
**Part 2 – How to import a template into Medical Director**
**Part 3 – How to use a template within a patient record**

## Part 1: How to import a template from a website

**Save the required template**




**When prompted select Save as**




**Select a location to save the template to eg. Desktop**

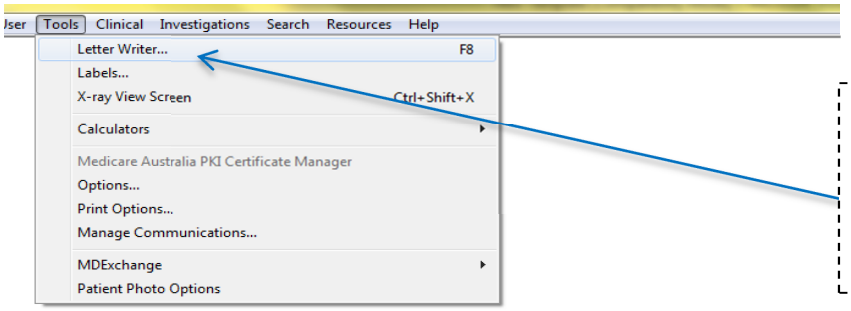
**Then press Save**

**The template has now been downloaded from the website and is saved to the desktop.**

# How To Import and Use Templates Within Medical Director Software

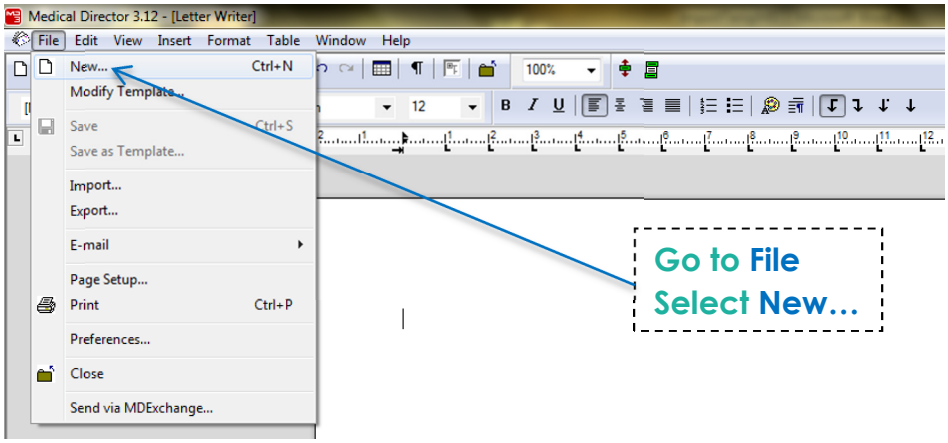
**Do not open the document as this will cause issues with the template fields and formatting** **Part 2: How to Import the template into Medical Director**

## Open Medical Director

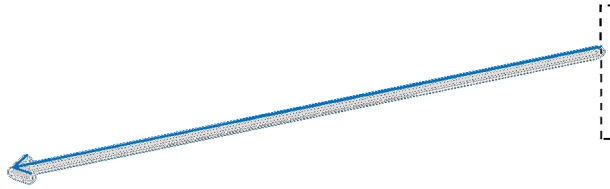



Go to Tools
Select Letter Writer…

This will open up the Letter Writer Tool/Interface



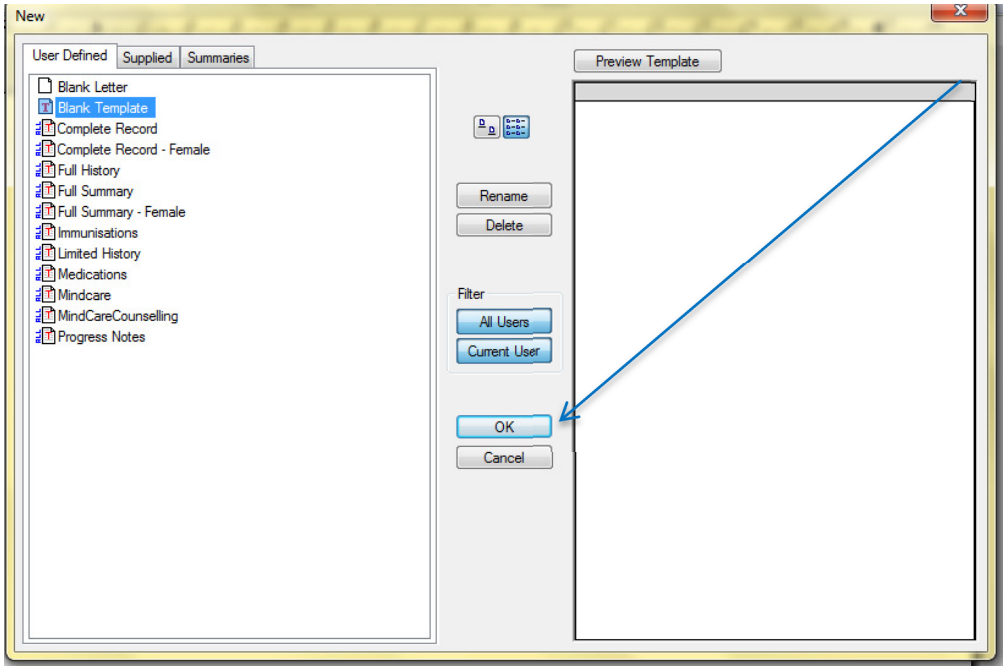

Go to File
Select New…

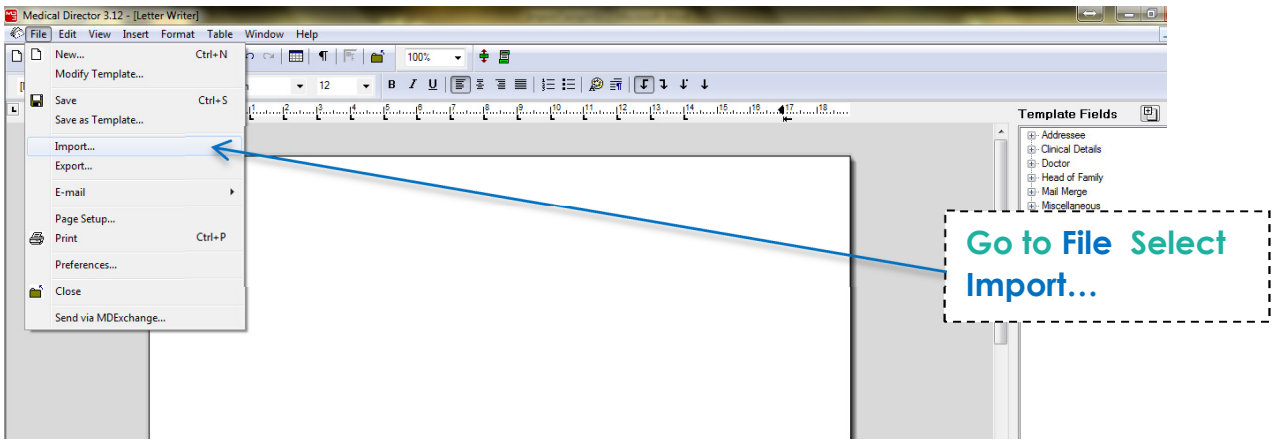


Select Blank Template

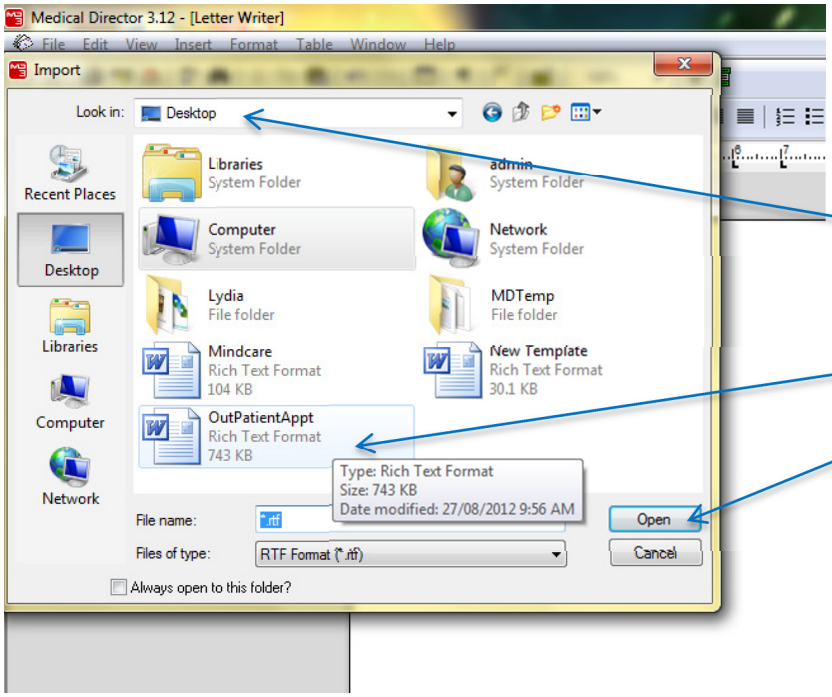
Then press OK

# How To Import and Use Templates Within Medical Director Software



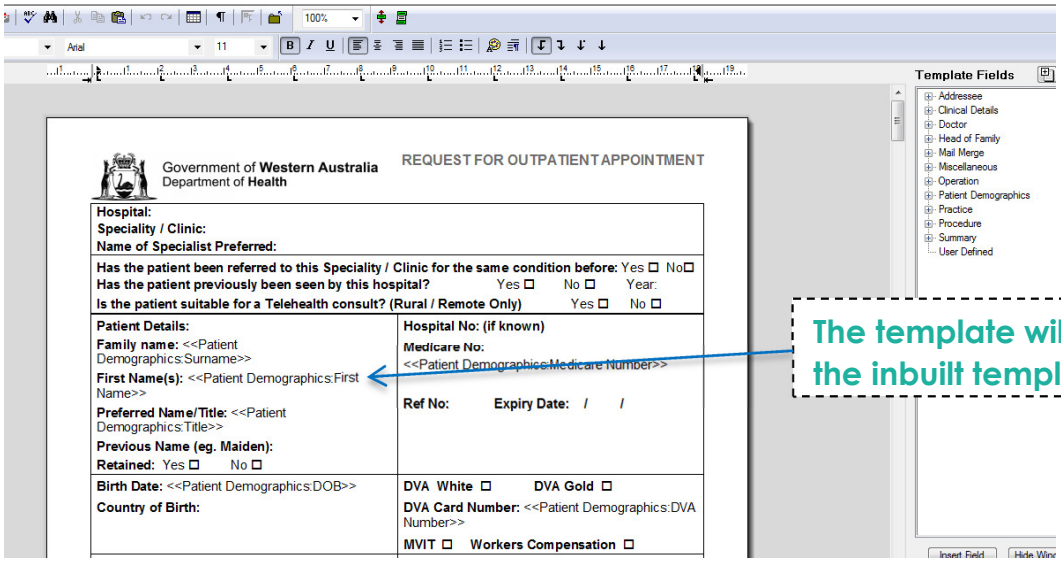



# How To Import and Use Templates Within Medical Director Software



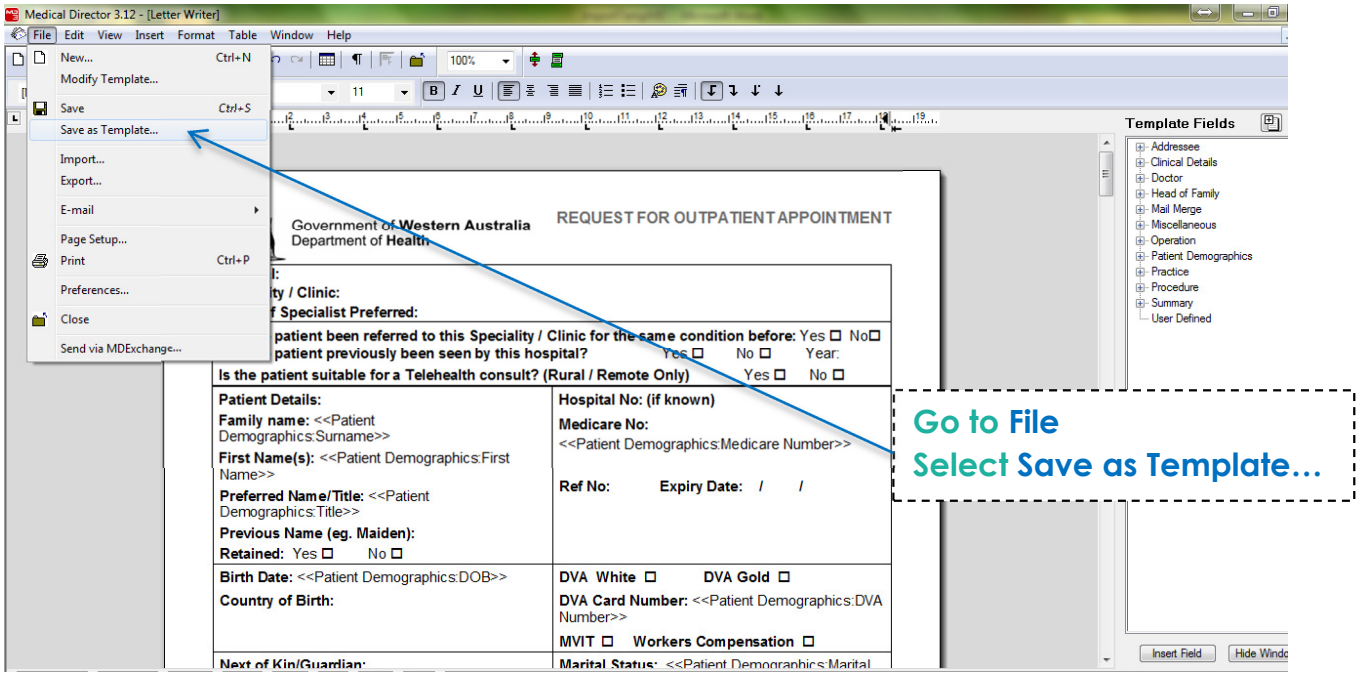

Go to the **Desktop** and locate the template

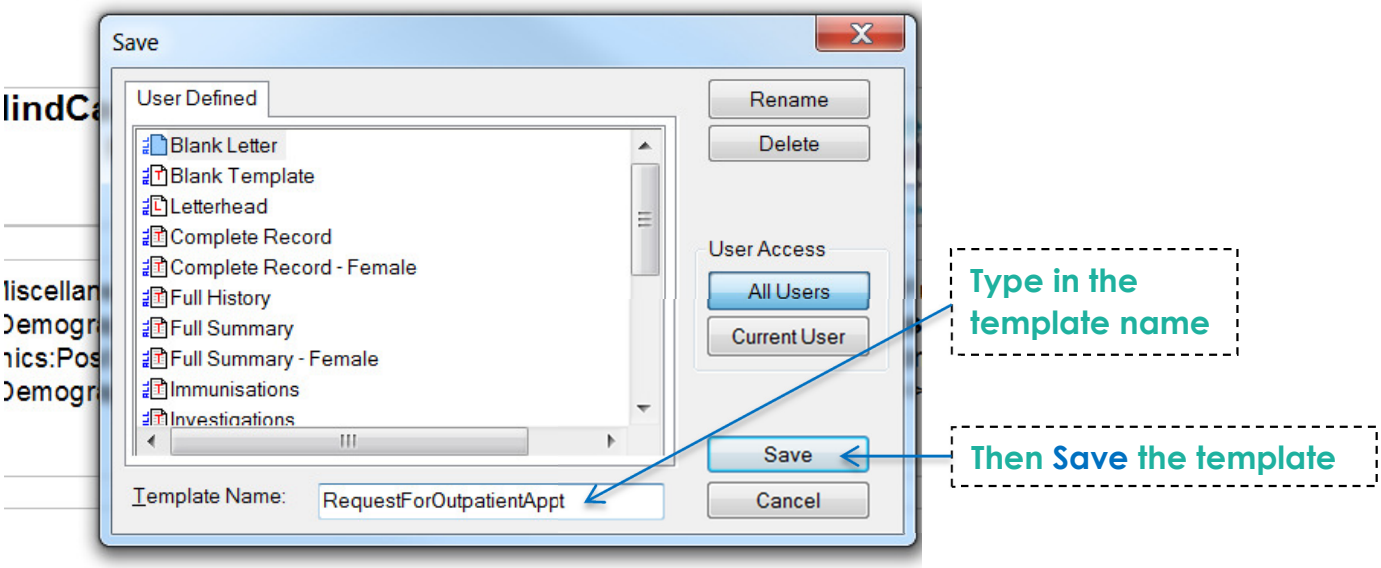
Click on it then press **Open**




The template will display with the inbuilt template fields

# How To Import and Use Templates Within Medical Director Software

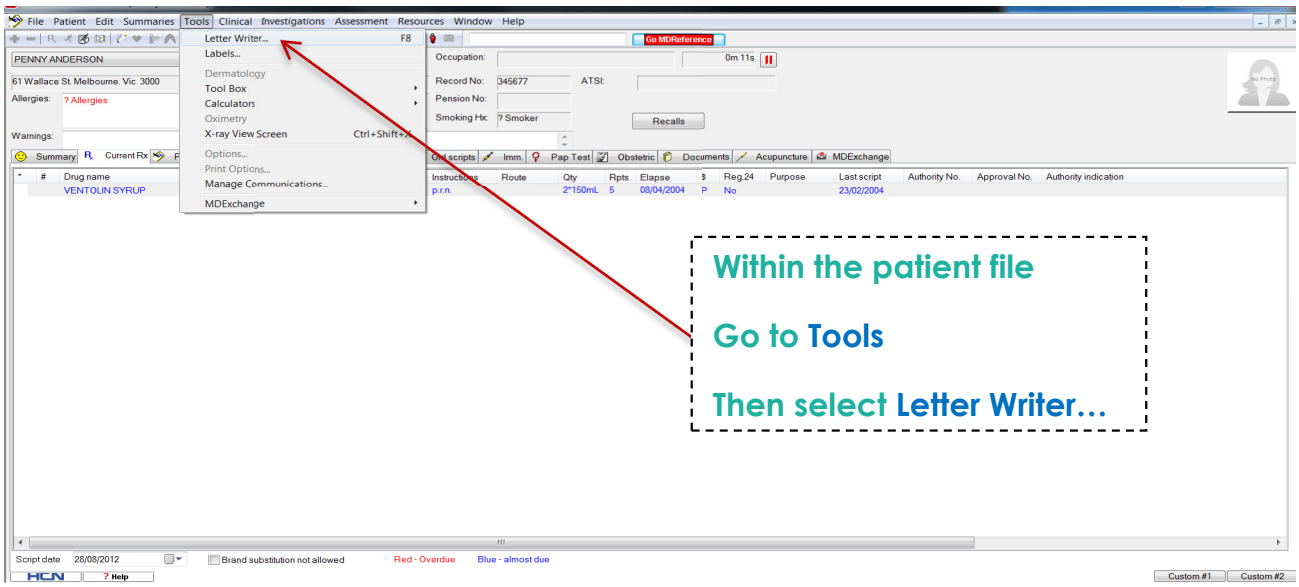


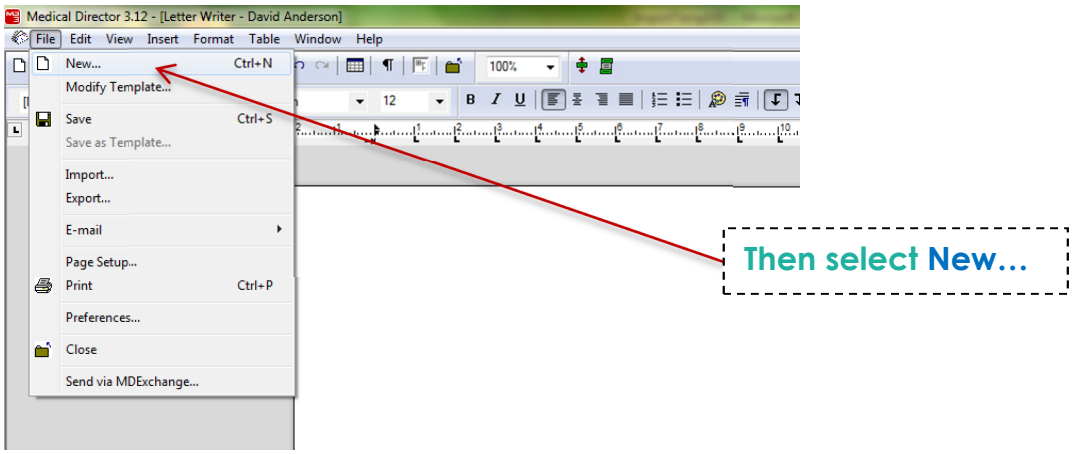



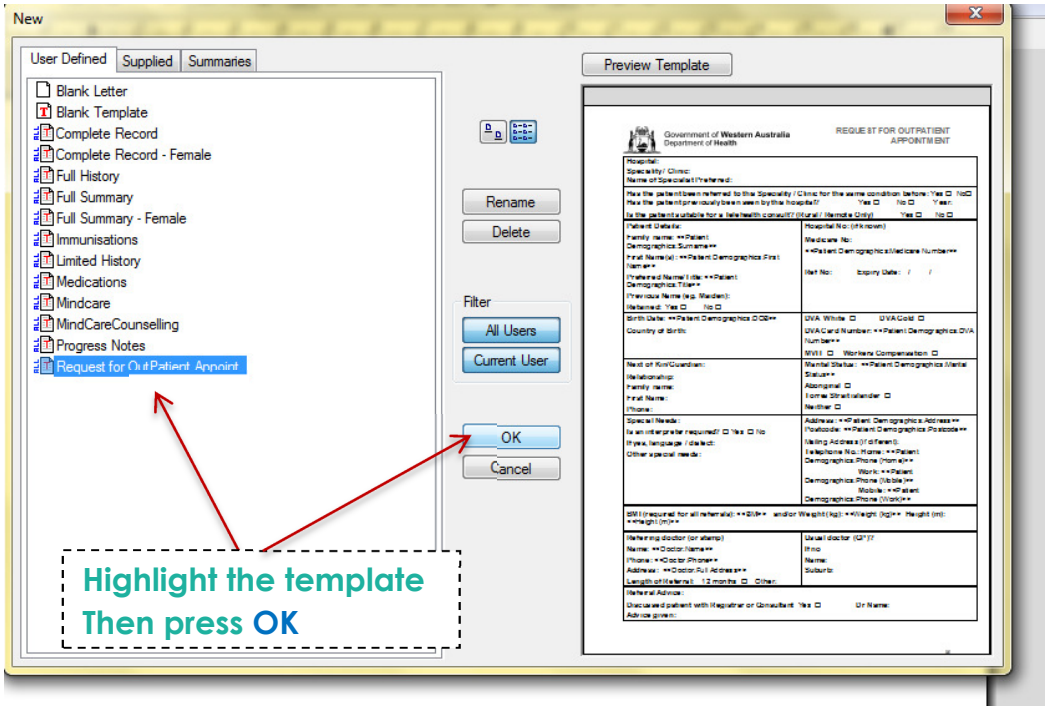

## The template has now been imported into Medical Director

# How To Import and Use Templates Within Medical Director Software

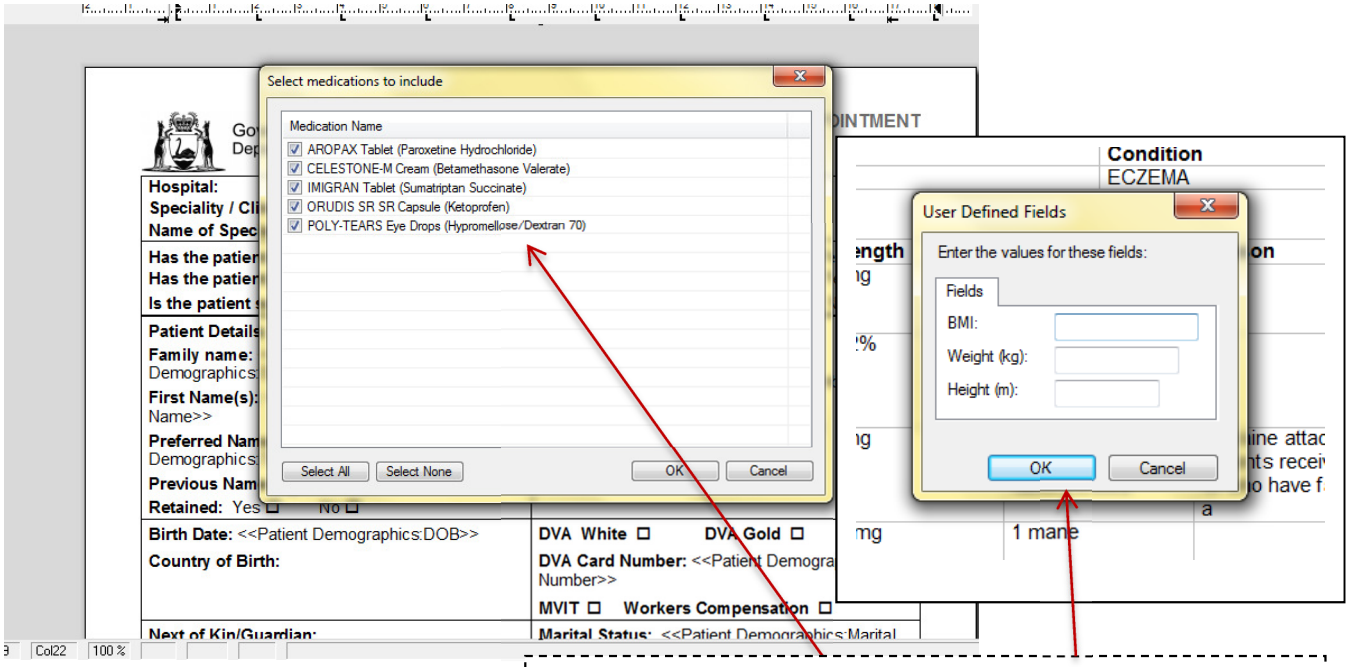
## Part 3: How to use a template within Medical Director



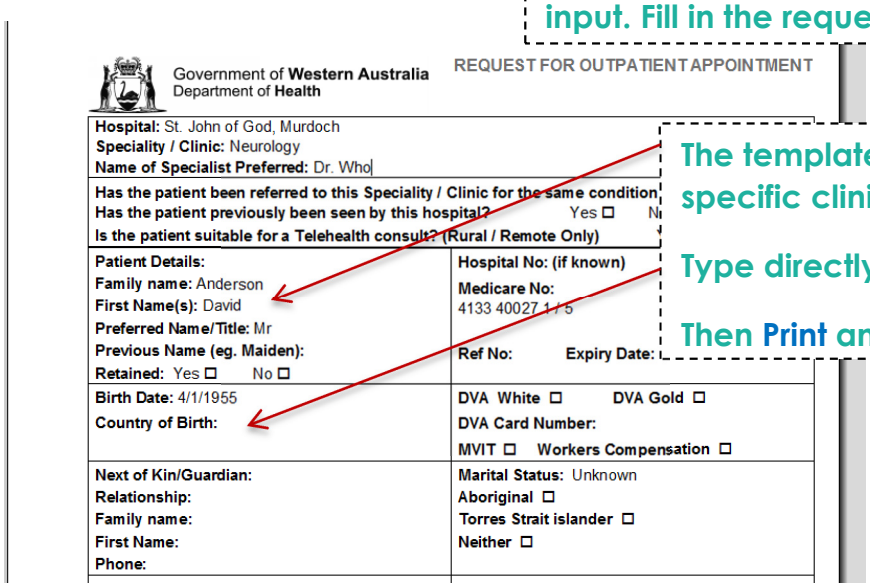



# How To Import and Use Templates Within Medical Director Software



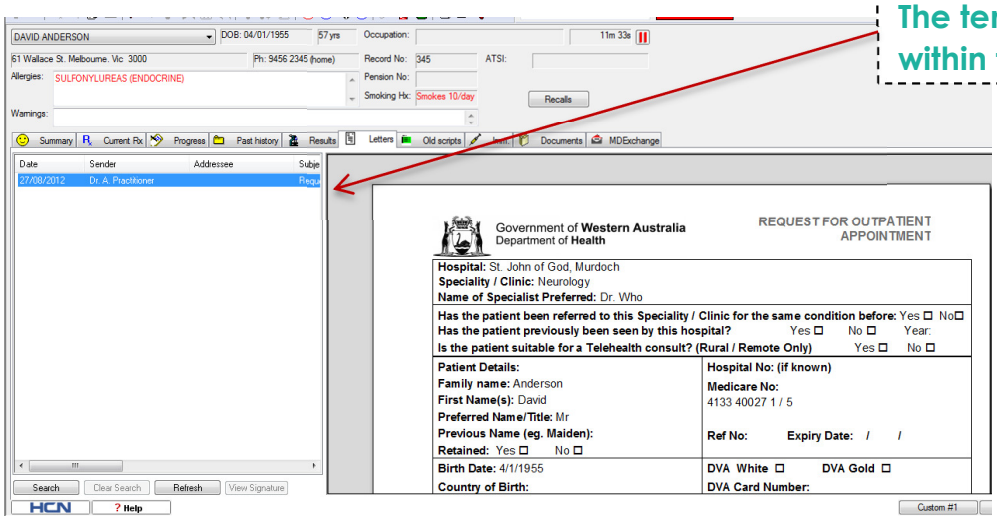

There will appear prompts that will require input. Fill in the requested fields then press **OK**




The template will pre-populate with specific clinical information

Type directly into the incomplete fields

Then **Print** and/or **Save** the document




The template/letter is stored within the patient notes