

Medical Director Templates – instruction notes

Importing MD templates from a disc

DO NOT DOUBLE CLICK ON THE 'RTF' DOCUMENT TO OPEN IT. This would open the template in Word. The end result of this is that you would lose the Medical Director fields that "populate" the template. 'RTF' MUST ONLY BE OPENED AND ALTERED IN MEDICAL DIRECTOR.

To install or import templates from a disc

1. Insert floppy disc / CD
2. Go to letter writer (F8) under Tools
3. File/Modify template
4. Select 'blank template' open
5. File/import
6. Find file on disc (a:/drive OR f:/drive) and open it
7. File/Save as template
8. Name the template, 'GP Exercise Referral' and save (important to differentiate between referrals and recalls)

Downloading and importing MD templates from the website. What to do with the "rtf" link:

DO NOT DOUBLE CLICK ON THE 'RTF' LINK TO OPEN IT - THIS WOULD OPEN THE TEMPLATE IN WORD. The end result of this is that you would lose the Medical Director fields that "populate" the template.

1. Right click on link and select Save Target As...
2. Select a location on hard drive (which you can find later) and save.
3. Open Medical Director and then Letter Writer.
4. File menu > Select Modify Template > Select Blank template.
5. File > Select Import- locate downloaded file and click on Open.
6. File > Select Save as template. Type in appropriate name and click on Save.

Once saved you can access the template with a patient record open in Medical Director. Open LetterWriter - File/New and then select the appropriate template.

Using imported MD templates for referrals

1. Select a patient for referral
2. Go to Letter Writer (Ctrl T)
3. Click File then click New from the menubar.
4. Select and highlight the template you want in one of the three lists User Defined, Supplied or Summaries. (Imported templates are usually found under user defined)
5. Click the Open button or press Enter to create a letter or referral form based on the template.
6. You may be prompted for further information to complete the details in the template (ie Fields 1, Fields 2 and so on. Fields vary between templates).
7. Select from a list or enter the text appropriately. There are many types of different information that may be required and these vary between templates. Respond to any prompts for names, addresses or other information that may be displayed.
8. Check the content of the letter/referral forms and make any amendments required.
9. Either press CTRL+P, select File and click Print from the menubar or click the Print button on the toolbar to print the letter/forms. A copy is added to the patient's record and can be viewed using the Letters tab. The merge is created and printed after all details are collected. A copy of the letter/forms is added to each patient's record. Patient details will be inserted and printed.

Installing or importing patient brochures and education information leaflets into MD

1. Open the Patient Education (Leaflet Browser) by selecting 'Files' and select 'Patient Education'. Go to 'Custom' section and create a new category heading by clicking 'File' then select 'New Category' or right mouse click 'New Category' and type in "GP Exercise Referral Scheme", press the ENTER key (keyboard). The heading will be sorted into alphabetical order.
2. Select created heading 'GP Exercise Referral Scheme'. Click the Add (red plus sign) button top left of screen, and select 'New Leaflet'.
3. A 'Select Leaflet File' window appears. Under 'Files of Type' tick the drop down key to select file type ie. PDF document (*.pdf), RTF, etc.
4. Highlight the document you want to import and click the Open button. File name will then automatically appear.
5. The new leaflet is appended to the end of the selected branch. At this point it is highlighted in 'Edit' mode allowing you to type a name for your new leaflet.