

Summary Sheet

Importing templates

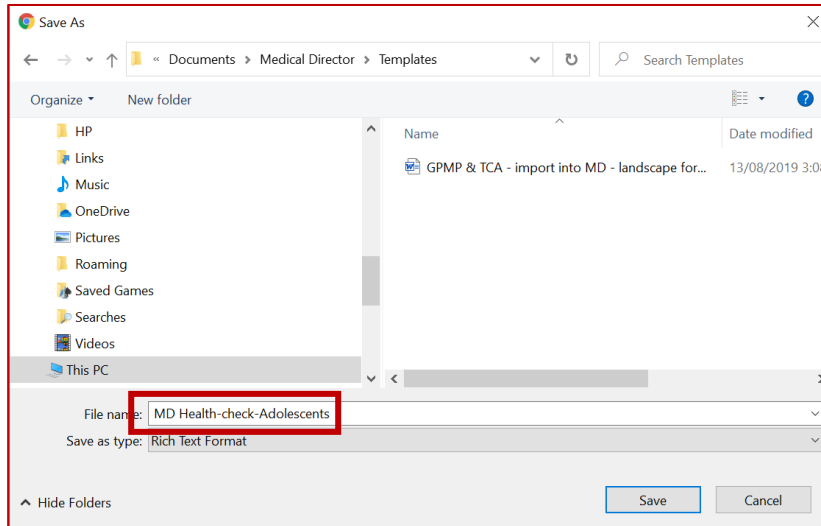
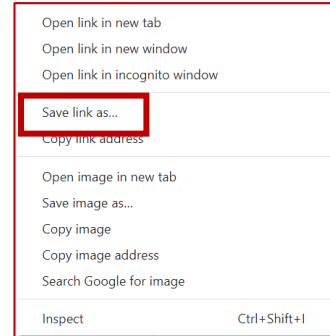
Follow these instructions when importing a template from another source eg a referral or health assessment template:

1. Right Click on the template and select **'Save link as'** or **'Save target as'**.

Note: The template must be in rich text format (.RTF) or word format – not pdf.

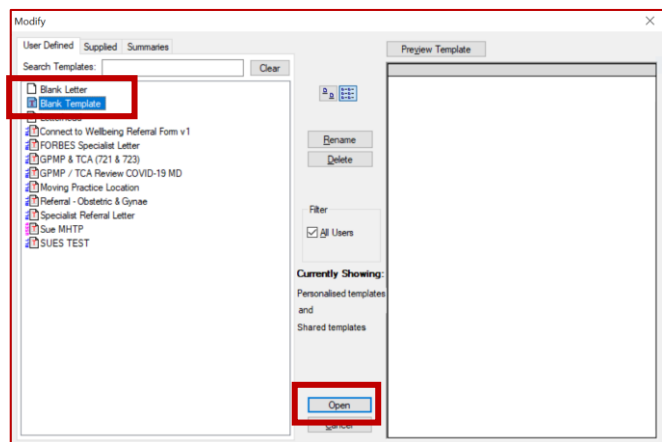
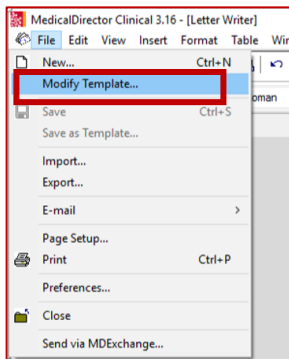
2. **Name the file** and **Save** it to a drive / folder on your computer/desktop.

Important: Do not then double-click on this file from your computer as this will open it in Word and corrupt the fields.

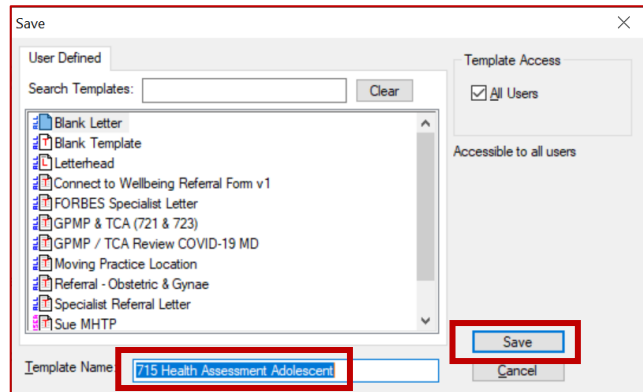
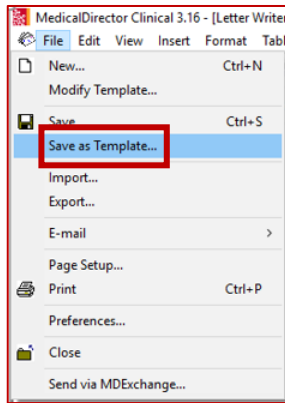


3. Open **LetterWriter** in MedicalDirector Clinical (**Tools > LetterWriter** or press **F8**)

4. Select **File > Modify Template > Blank Template > Open** (this is the blank template on which you will import the one you have saved).



5. Select **File > Import** and navigate to where you saved the imported template eg. Desktop
6. Select the template (.RTF file) from the list and select **Open**.
7. Modify your template (if necessary).
8. Select **File > Save as Template** and name your template. **Save**



8. Your template will then be accessible in the '**User Defined**' templates tab.

