Importing Templates into Clinical Software

NOTE: Do not open templates in Word, as this can disable template fields.
When you left-click on the template download link, you may be offered the option to **Open** or **Save** the document. Always choose **Save As** from the Save options, and save it to your Desk Top. If you use **Save**, you will then be prompted to open the file once the download is complete, which may corrupt the template fields.
Alternatively, you can right-click on the link and save the file to your computer Desk Top using the **Save target as** option. The Desk Top is an easy place from which to import the file into the clinical software programs.
AGAIN: Do not open templates in Word, as this can disable template fields.

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 Desk Top 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 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 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 Desk Top 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 in an appropriate template name, and tick the **Available to all users** box if appropriate.
• 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.