

Importing and Saving Templates

Documents formatted as MS Word Form templates

Templates formatted as MS Word Forms allow you to type directly into the form fields (grey shaded areas and check boxes). However, you cannot change the existing text unless you first unlock the form via the Forms Toolbar. Please contact us if you want to know how to remove the form feature.

To save a MS Word Form template:

- Click the link and 'Save' to your PC. The file will save as a .dot file.

Medical Director

When importing to the Letter Writer templates with merge fields **must be in Rich Text Format (.rtf)**.

1. Save template to a folder or to your desktop. DO NOT OPEN IN MSWORD.
2. Open medical director letter writer via the main menu or in a patient's file.
3. Once the letter writer is open click on 'file' from the menu bar.
4. Select 'modify template', then select 'blank template'
5. Click on file menu again and select 'import'
6. Select folder or desktop where you have saved the template and highlight the template. Click 'open'. This will import your template.
7. Now you need to save your template by going back to the file menu and clicking 'save as a template'. Give your template a name and it is ready for use.

Practix

First, make sure you have imported the new template into **c:\msp\mspdata\templates**

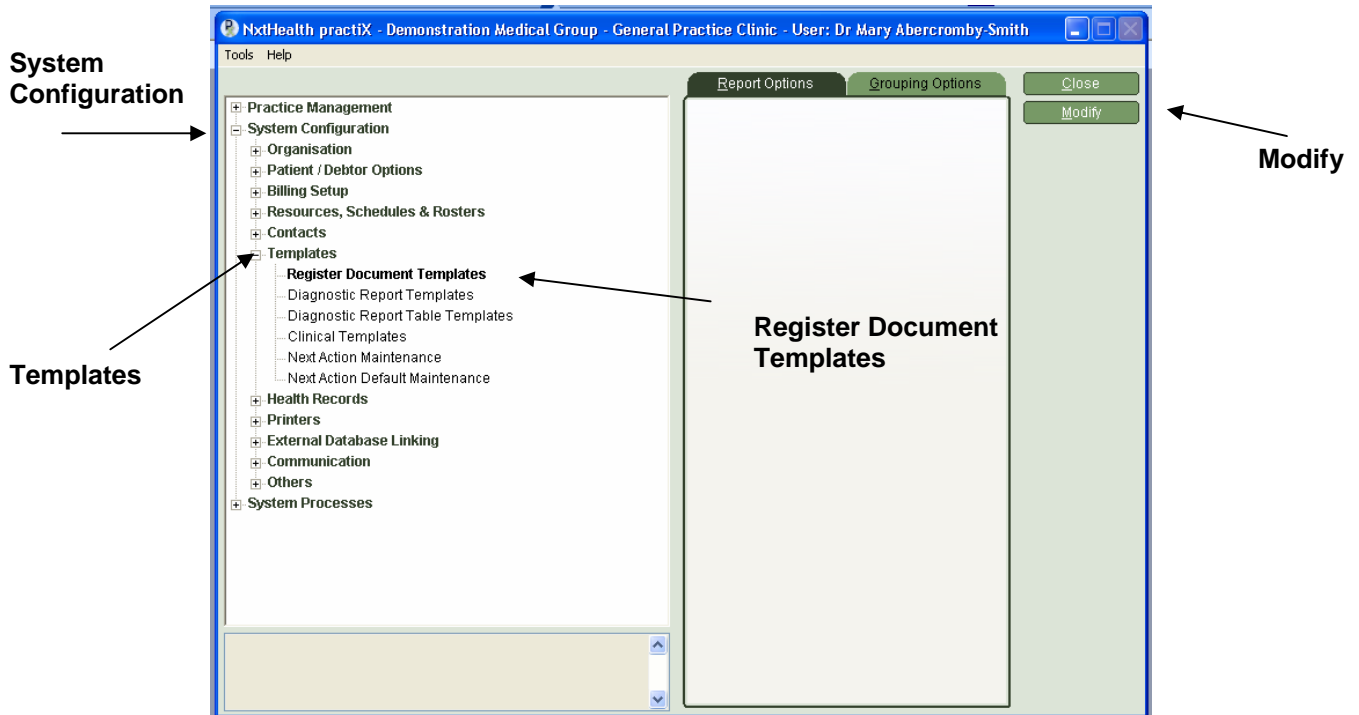
Start up PractiX, enter log on details and go into **Administration**.



← **Administration**

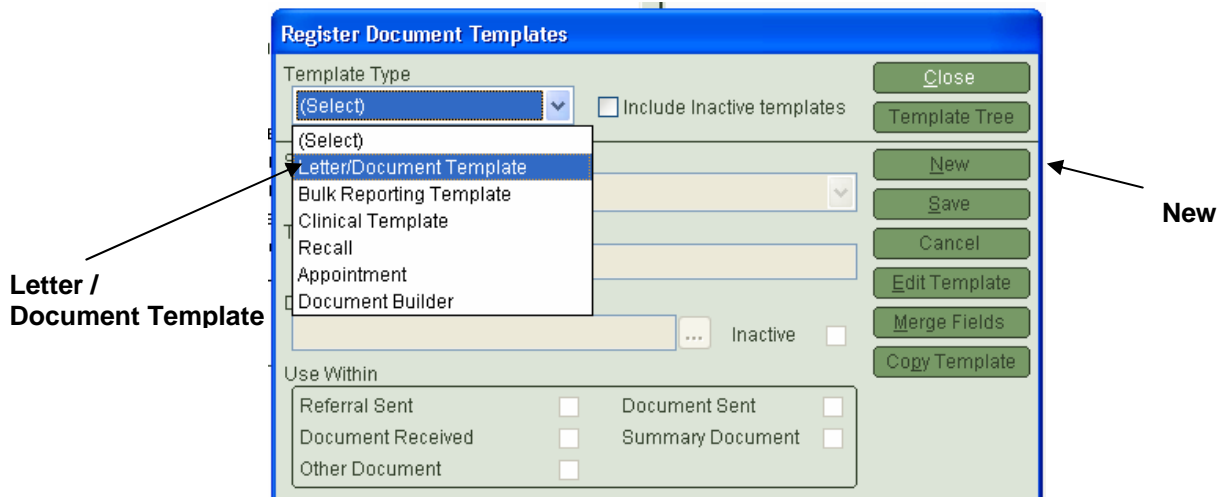
Next go into **System Configuration**. Click the **plus sign** in the box next to **Templates** (in other words expand the templates menu).

- Click on **Register Document Templates**.
- Click the **Modify** button at the top right of the screen.



Select the down arrow next to **Template Type** to bring the pull down menu down.

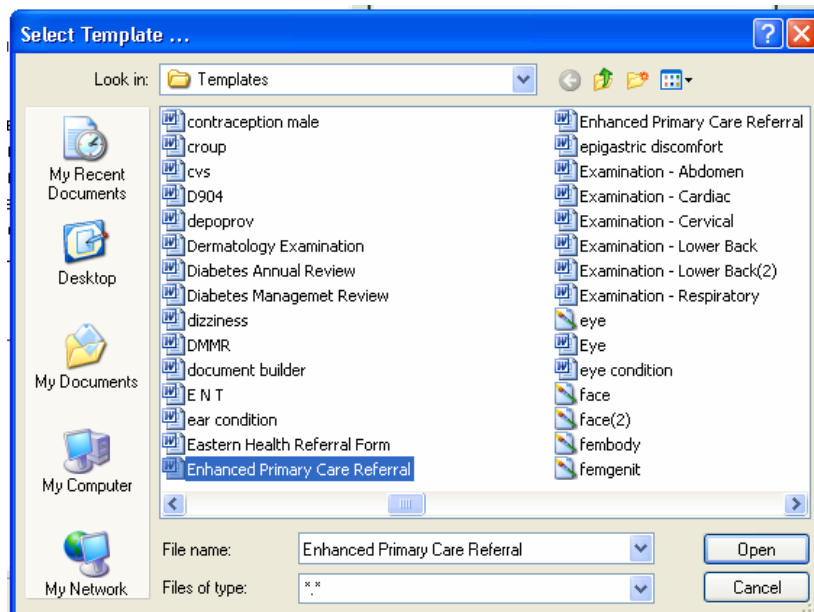
- Click on **Letter/Document Template**.
- Click the **new** button.



Click the **Select** button.

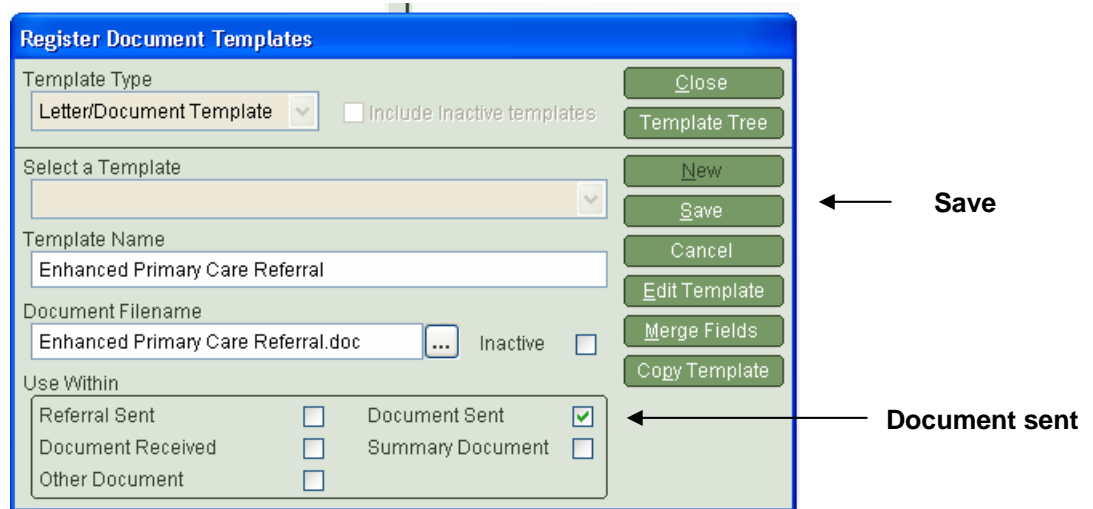


Find the file that you imported, click **open** then yes (if it asks about replacing the files or anything like that).



It will use the file name as the template name. If you wish you can change the template name by simply typing into the **Template Name** box.

Then, in the **Use Within** box, select the **Document Sent** box and click **Save**.



There are several different categories within the Use Within box. You need to select the most appropriate box for the document you are importing. If it is a referral, best to tick the **Referral Sent** box. Likewise, if you are importing a health summary template, the **Summary Document** box should be ticked.

Also note you can tick more than one box, or even all of them.

Now that **should** be it. Open up a patient record to and test run by trying to create the document.