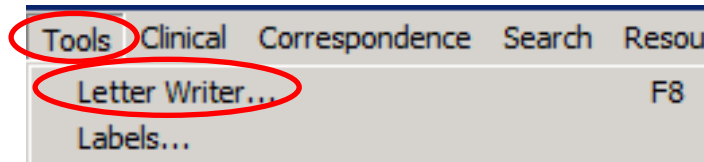
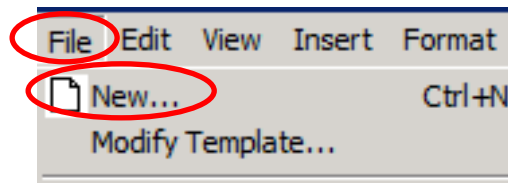


Creating Templates in Medical Director

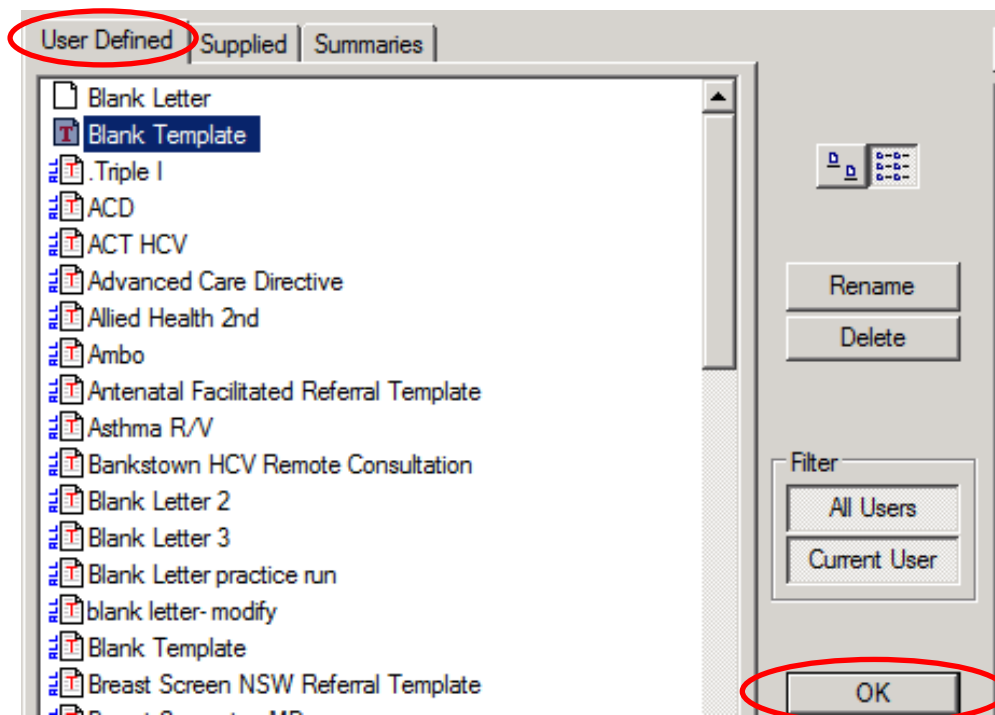
1. From the Main screen, click on **Tools** then **Letter Writer** or press **F8** on your keyboard. You should now see a blank document open in letter writer.



2. Go to **File** and select **New** or press **Ctrl + N** at the same time on your keyboard. The **New** window appears.



3. Select **Blank Template** from the **User Defined** list. Click the **OK** button. A new blank document will open with which to create your template. Anything you add to this template page will be saved within it, and automatically appear on any new letters you create based on it.





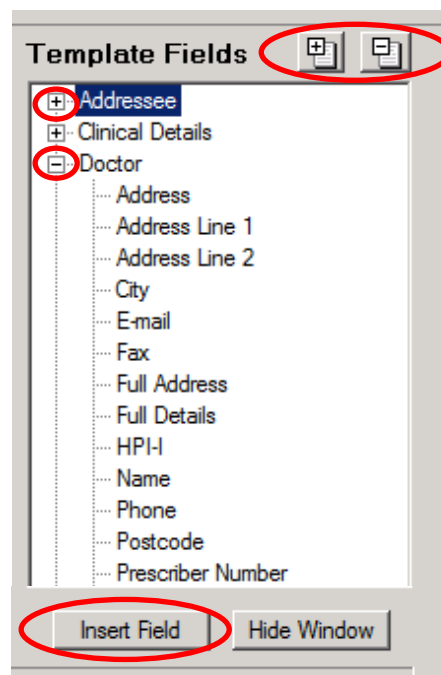
4. Add content to the template as necessary. This could include:

- [Text](#)
- [Tables](#)
- [Images and Objects](#)
- [Letterhead](#)
- [Data Fields](#)

(Click on each of the links above for detailed information on creating this content).

Adding Data Fields to a Template

1. From within Letter Writer, either press **Ctrl+D**, or click on **View** and select **Data Toolbar**.
2. The Data Toolbar is revealed, appearing to the right-hand side of the Letter Writer window.
 - To expand or contract all data categories in the list, click the **Expand All**  or **Contract All**  buttons.
 - To expand or contract an individual category, click the **Plus** or **Minus** buttons beside the category.
3. Click within your template to place the insertion point where you would like the field to be inserted
4. Select a field to add to your template, by either double-clicking the field, or selecting the field and clicking the **Insert Data** button.
5. The field is added to your template and appears on your page.
6. Continue to add fields to the template as you desire.

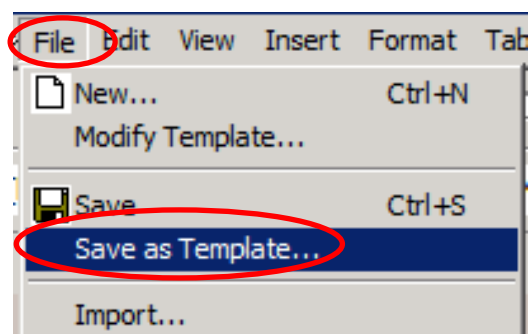


Note/ When adding fields to a letter, the Data Toolbar's title is **Data**. When adding fields to a template, it is **Template Fields**.

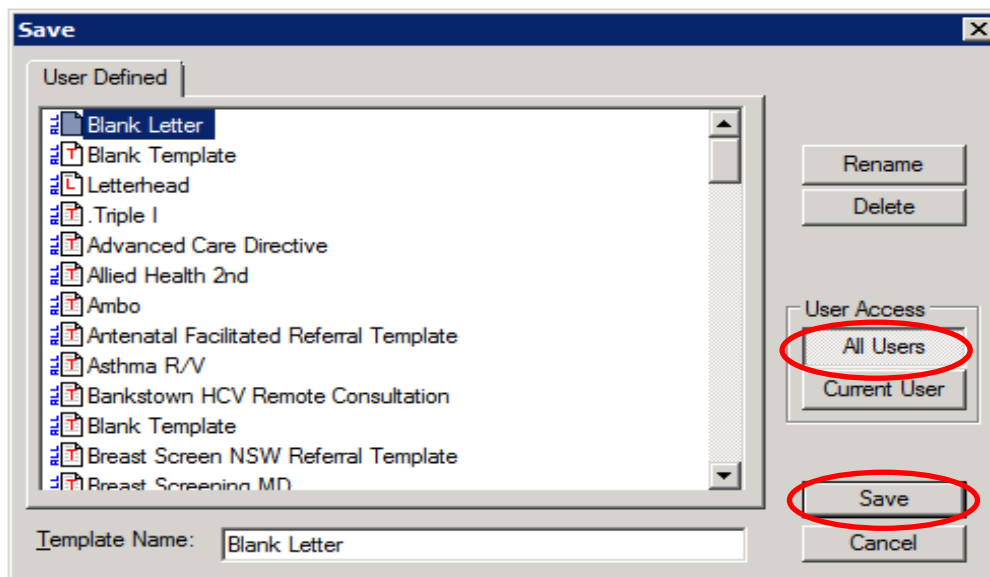
You have access to a greater variety of fields when using the Letter Writer from within a patient's record, than from the Medical Director main screen.

When adding fields to a template, you have access to an extra field called **User Defined**. This field allows you to create customised field codes for use in your template.

7. Click on **File** and select **Save as Template...**



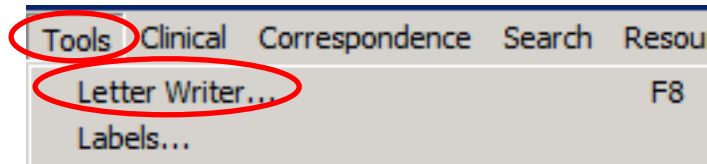
8. Select a **User Access** option, type a name for the template in the **Template Name** text box and click the **Save** button.



- **All Users:** These templates are available to everyone on your network. The icon in the template list is marked with the word ALL, in blue, as seen in the image above.
- **Current User:** These templates are available only to the user who created them. The icon in the template list is marked with the word USER in violet.

Modifying Existing Templates in Medical Director

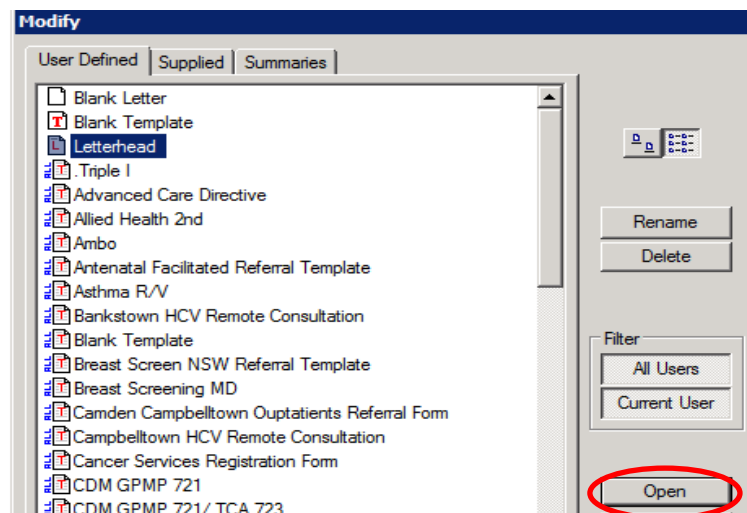
1. In the Main menu, click on **Tools** then **Letter Writer** or press **F8** on your keyboard. You should now see a blank document open in letter writer.



2. Go to **File** and select **Modify Template**. The **Modify** window appears.



3. Select the template you wish to modify from those available and click the **Open** button to confirm your selection.



4. Make modifications to the template as necessary and save the template.

REFERENCE

Medicaldirector.com. (2018). *MedicalDirector*. [online] Available at: https://www.medicaldirector.com/help/#t=topics-clinical%2FCreating_and_Modifying_Templates.htm [Accessed 2 Aug. 2018].