

Importing templates

eReferral templates

DO NOT OPEN templates from the website.

Right click on the template you require then left click 'Save Target As'. Save the template to a folder or to your desktop.

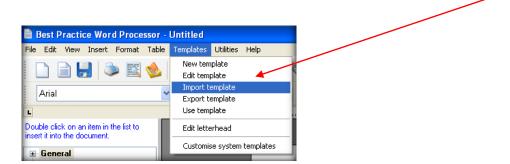
- Best Practice
- Medical Director
- Genie
- ZedMed

Best Practice

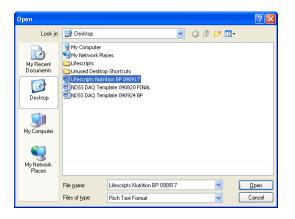
- 1. When importing a file from a website, **right click** the mouse on the template you want, and then left click **Save Target As**. Save the template to a folder or to your desktop.
- 2. At the main start screen, open the **Word Processor** by clicking the icon that looks like a piece of paper.



3. Once in the Word Processor, from the main menu, select **Templates**, then **Import Templates**.



4. Select folder or desktop where you saved the template and highlight the template. Click **Open** to import your template.



5. Now save your template, select the **Save** icon.



6. Finally, name the template. Make sure you tick the **Available to all users box** to give access to all users.

If you leave it unticked, only you will have access to that template. Select save and the template is now ready to be used.

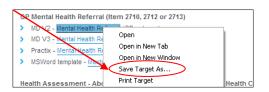
🕺 Template detail 🛛 🗙
Template name:
Lifescripts Nutrition
✓ Available to all users
<u>S</u> ave <u>C</u> ancel

Medical Director

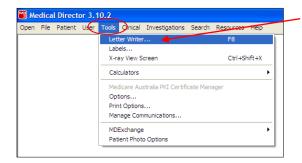
When importing to the Letter Writer templates with merge fields **must be in Rich Text Format** (.rtf).

1. When importing a file from a website, **right click** the mouse on the template you want, then left click **Save Target As**. Save the template to a folder or to your desktop.

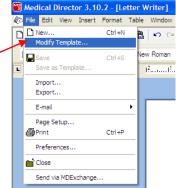
DO NOT OPEN IN MSWORD.

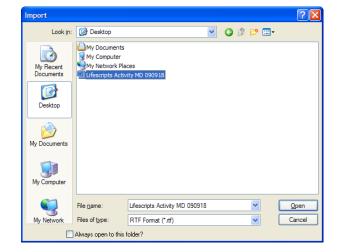


Open Medical Director Letter writer via the main menu, pressing F8 or in a patient's file. 2.

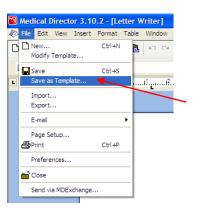


- Once the Letter Writer is open, click on File from the menu bar 3. and select Modify Template, then select Blank template. Once the blank screen comes back up, again click on file menu and select Import.
- 4. Select folder or desktop where you have saved the template and highlight the template. Click **Open**. This will import your template.

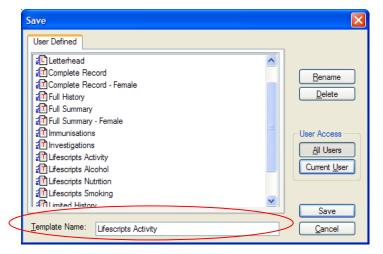




Now save your template by going back to the file menu and selecting Save as Template. 5.



6. Give your template a name, select **Save** and it is ready for use.



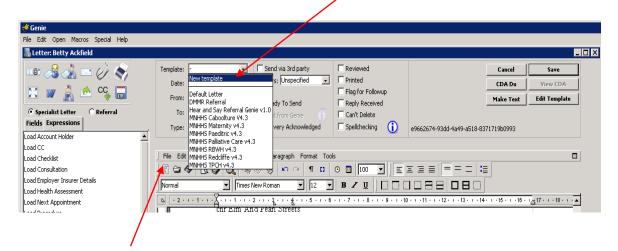
Genie

REMEMBER: it has to be either .4w7 or .4wt file formats, or .doc or .rtf formats

- 1. From the appointment screen add a test patient or click on a patient
- 2. Click on red quill



3. Go to the top of the screen and select new template



4. Select File, then select Open

File Edit Open Macros Spi	ecial Help			
🐳 4D Write Import:			×	4
Desktop •			👻 🚱 Search Desktop	
Organize 🔻 New folder			S - 🖬 🔞	
Favorites	Libraries System Folder	Donna Hayward System Folder	Computer System Folder	
🖳 Recent Places	Network System Folder	Genie Manual Shortcut Control Shortcut	MO Delivery Report Shortcut 1.06 KB	
Documents Music Pictures	Hear and Say MO Rich Text Document 10.0 KB	Hear and Say Referral Genie v1.1.4W7 4W7 File 10.6 KB	mind_referral_01bp_130514_tp Rich Text Document 96.3 KB	
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👊 Network				
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			Open Cancel	1.

5. Now navigate to where you want to import the templates from and select open

Genie File Edit Open Macros	Special Help
🐻 Edit Template	
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Load Account Holder - Allergies Current Medications Current Problems Current Problems + Notes	File Edit View Insert Style Colors Paragraph Format Tools I a a a a a a a a a a a a a a a a a a a
Employer Insurer Details Immunisations Last Measurement Life Events	Hear and Say
Obstetrics History Past Hx Past Hx + Notes Patient's Address Patient Preferred Name	Request for Services – Referral Form Phone 07 3850 2111 Fax 07 3366 1803

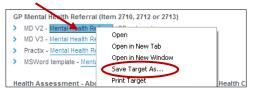
6. Name the referral and select save.

ZedMed

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

1. When importing a file from a website, **right click** the mouse on the template you want, then left click **Save Target As**. Save the template to a folder or to your desktop.

DO <u>NOT</u> OPEN IN MSWORD.



2. Open ZedMed and go to the Clinical component by clicking on **Clinical Records**.

gement Reports Tools Practice Se	tup WP Setup Utilities	
Reception	Management	Utilities
Patients (F4)		
Waiting Room		
Appointments		
Daily Reports		
<u>B</u> anking		-
Clinical Records		

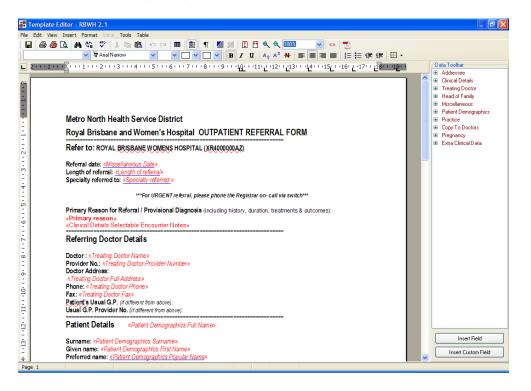
3. Next, to open up the Word Processor to import the file, click on **Tools, Clinical WP Setup**, and then **WP Templates**.

	\begin{split} Zedmed (
	File Encounte	r Results Re	ference Voice	Library Reports	Tools Utilities Help					
	Open Patient	Open Family	Close Patient	Waiting Room	My Options Global Options Scan Documents and R	Results F11	Address Book	🔮 Travel	Batch Writer	To Do List
4.			·		Spell Check Chrical Setup Canter Source Intramal Briefcase Mode Batch Script Print Printer Setup	F12	WP Templates Auto Text			
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5. Now **Browse** to your template you wish to import and select it, then put a description for the template into the **Description** field, and press the **OK** button.

Template	Import 🛛 🔀				
Filename:	F:\TPCH outpatient template ZM v2.1 110207.rtf Browse				
	TPCH Outpatient Referral 2.1				

6. That's it; you have imported your template. If you wish to edit it, just double click on the template name to open up the Word Processor with that template.



Adapted from Brisbane North Primary Health Network hospital e-referral template importing instructions: <u>www.brisbanenorthphn.org.au</u>