

Template Installation Guide

GPs and practice staff often need to install templates into their medical software, but for some it can be challenging. This guide is aimed at the beginner who needs clear step by step instructions.

Some assumptions have been made however - We assume that you are using Internet Explorer to look at the Internet, and that your computer has a recent version of Windows (such as XP). We also assume that you are using Medical Director and that you already capable of logging in and looking up patients (Note: this might cause trouble if you are at reception and have been locked out of the patient records.)

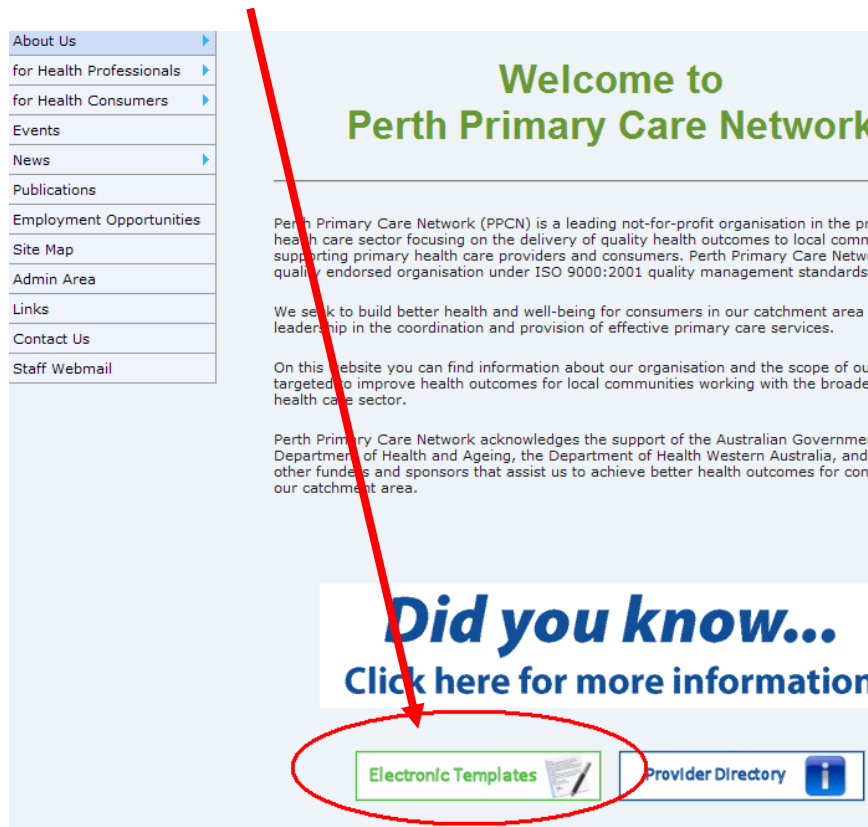
If you have difficulty following these steps, or need instructions for downloading into other software (for example Best Practice) please contact IT Services at Perth Primary Care Network at (08) 9376 9200 for further assistance.

0. What is a Template?

Templates in Medical Software are files that you can download and then 'plug in' that allow the doctor to quickly make a particular document over and over again without them having to enter in the patient details every time. The template is usually a special type of word document that contains 'fields' in it that can pull information out of the database and straight onto the page. Templates can save a lot of time and effort, and most medical software ships with at least one or two of them, (such as 'Referral Letter to Specialist') but there are many more out there that you might find just as useful.

1. Get on the Internet and find a Template.

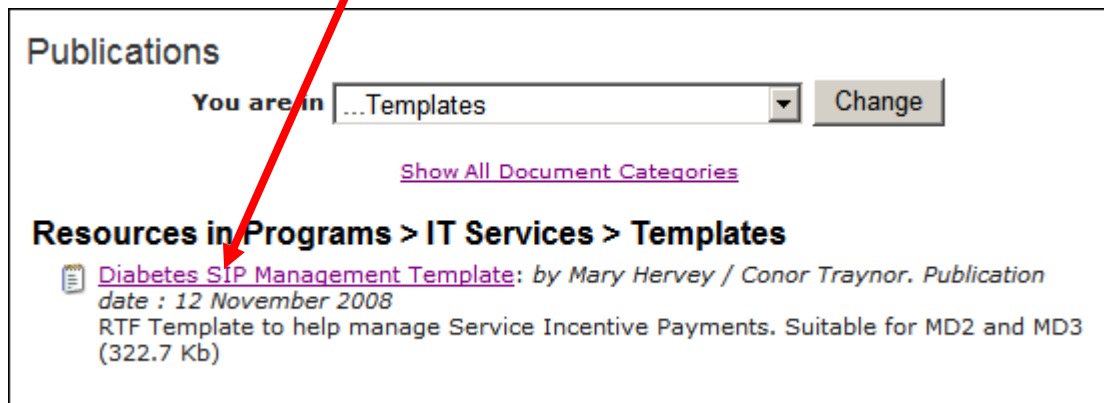
There are many websites out there that have templates for downloading. Our website is www.ppcn.com.au there you will find a button that will take you quickly to the right place.



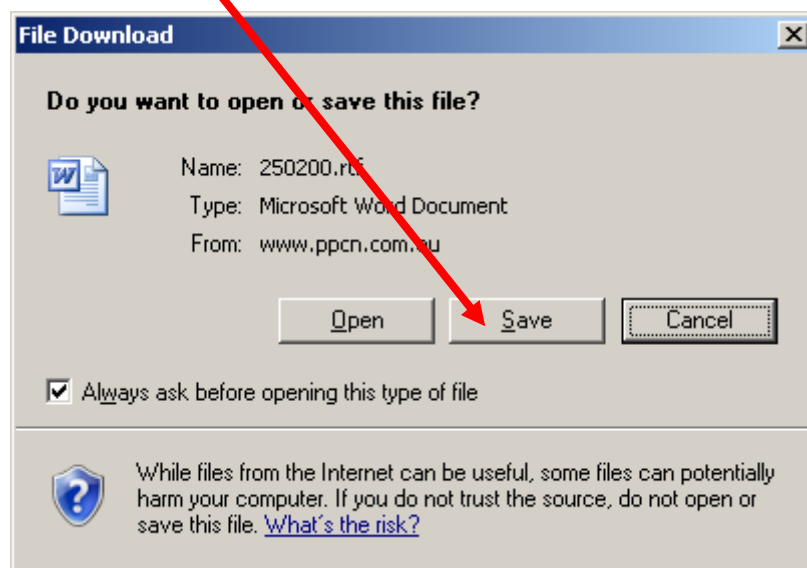
The screenshot shows the Perth Primary Care Network website. On the left is a navigation menu with the following items: About Us, for Health Professionals, for Health Consumers, Events, News, Publications, Employment Opportunities, Site Map, Admin Area, Links, Contact Us, and Staff Webmail. The main content area features a 'Welcome to Perth Primary Care Network' header, followed by introductory text about the organization. Below this is a 'Did you know...' banner with the text 'Click here for more information'. At the bottom of the banner, there are two buttons: 'Electronic Templates' (circled in red) and 'Provider Directory'.

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2. Click on the website link of the template you would like to install.

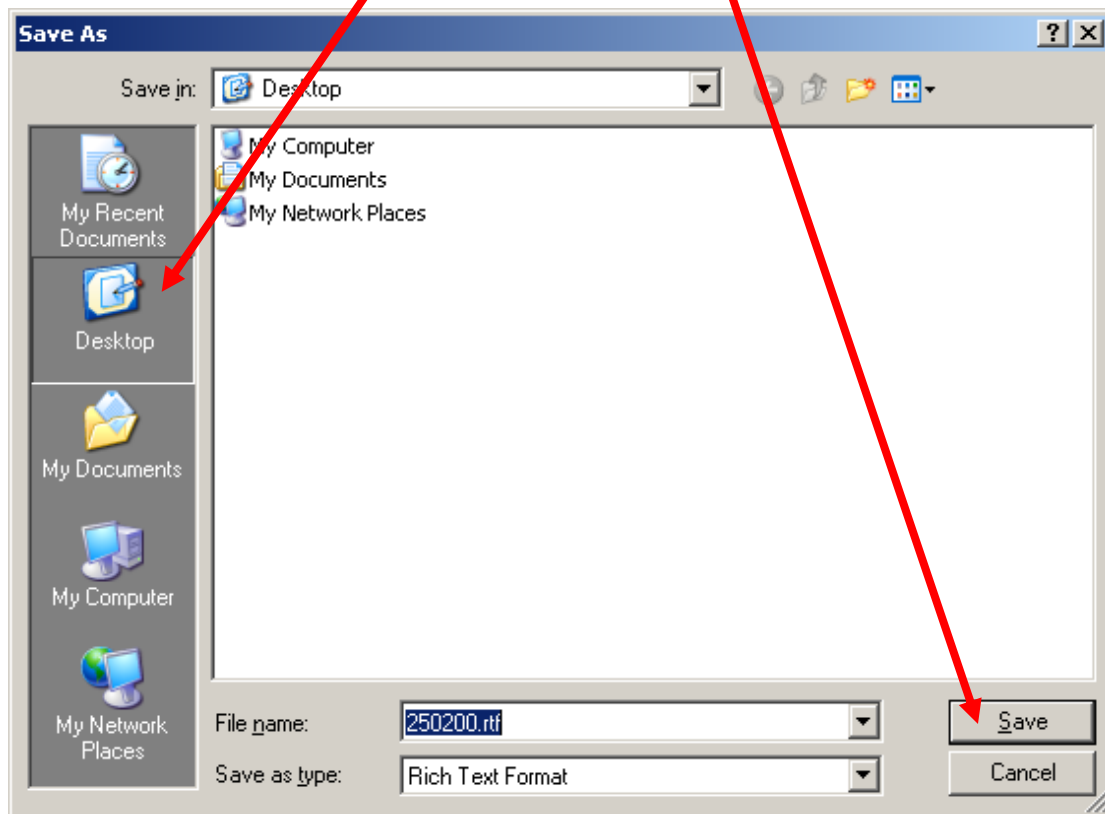


3. A window should come up asking to open or save. Do NOT open the file, instead press the Save button. (This is important because opening it may cause the Template to not work later)

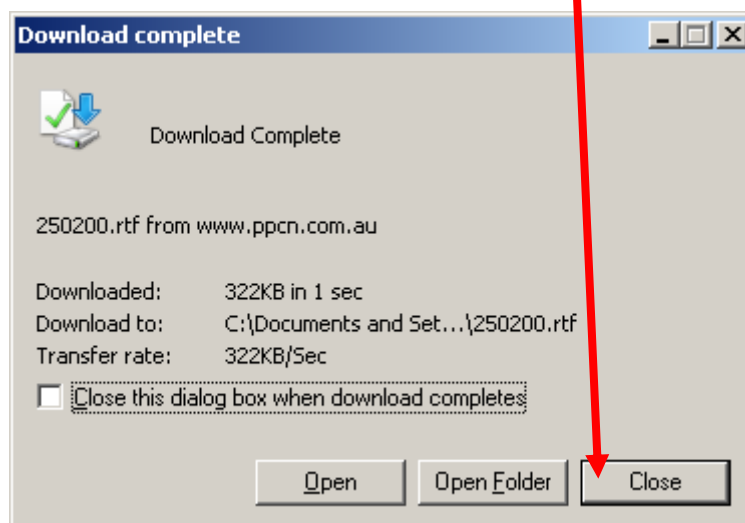


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4. **Press the Desktop Button, and then the Save Button.** This should start the download of the file to your desktop.



5. **When the Download is complete, press the Close Button.**
Once again, do not open the file, as it may cause the Template to not work later.

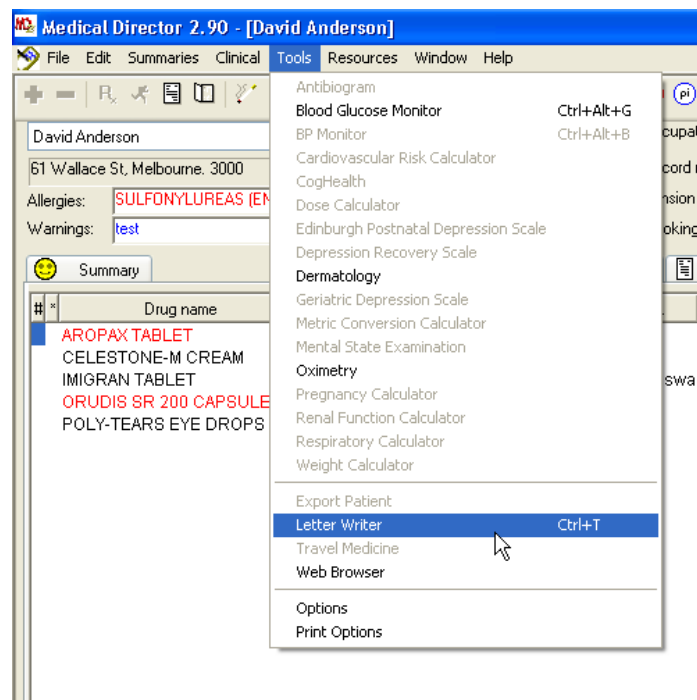


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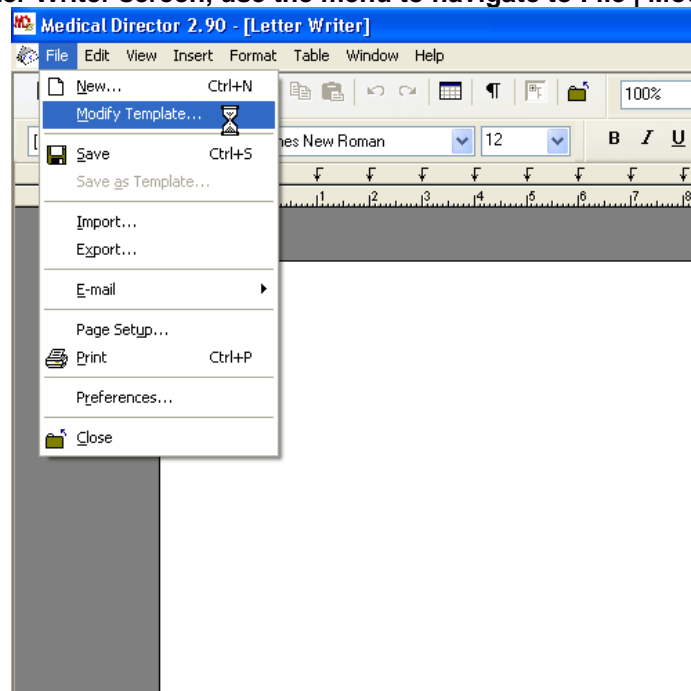
6. Log into Medical Director, look up and select a patient.



7. In Medical Director, use the menu to navigate to Tools | Letter Writer

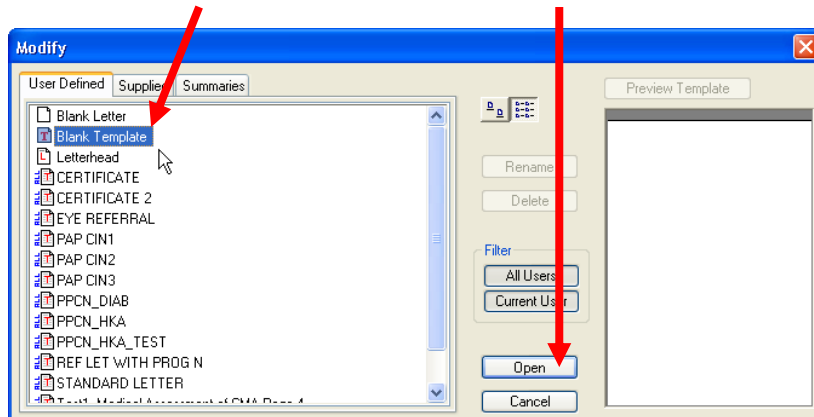


8. In the Letter Writer screen, use the menu to navigate to File | Modify Template

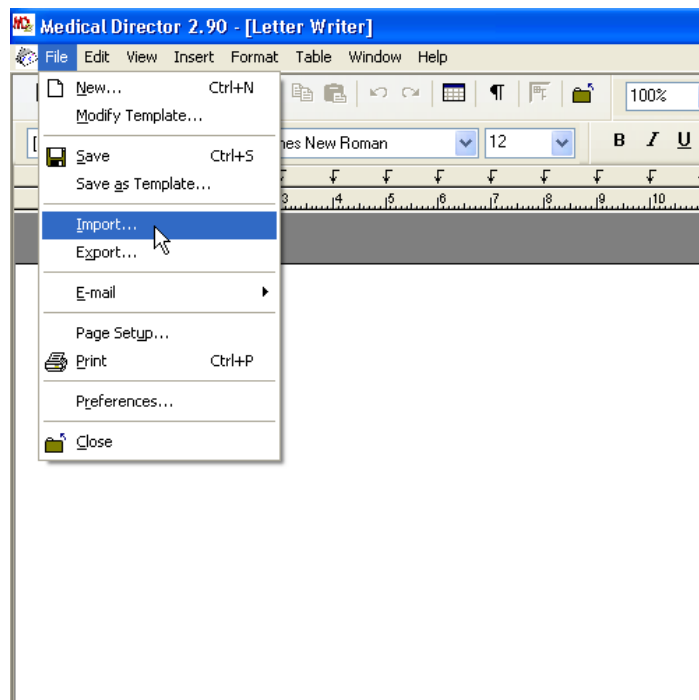


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9. Select the Blank Template, and Press the Open Button.

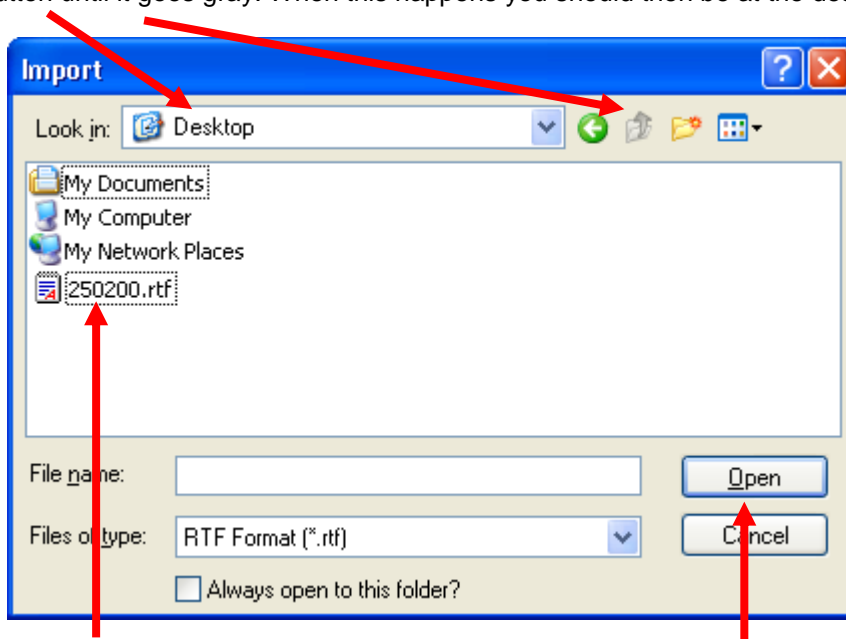


10. Use the Menu to navigate to File | Import



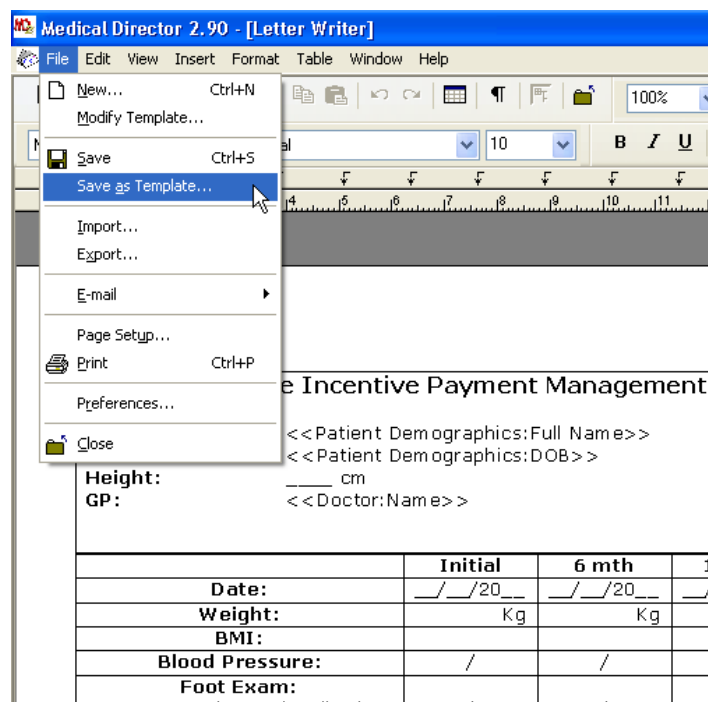
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- 11. Navigate to the Desktop.** The file downloaded back at step 4 was saved to the desktop, so we should find it there. You can do this by pressing the 'Up One Folder' Button until it goes gray. When this happens you should then be at the desktop



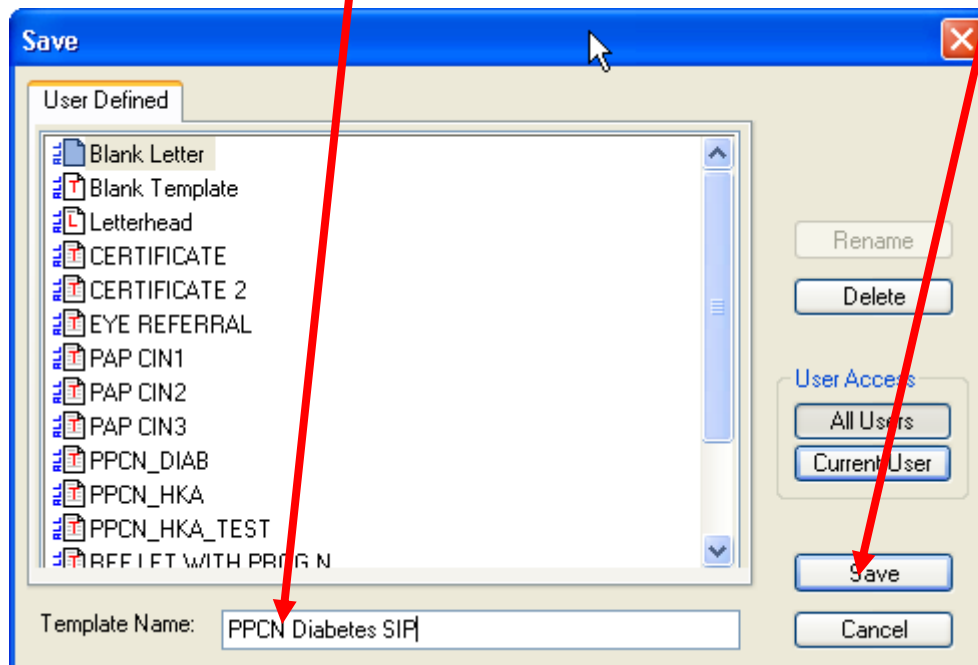
- 12. Select the File that you downloaded, and press the Open Button.**
The template content will now appear on the screen

- 13. Use the menu to navigate to File | Save as Template**



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- 14. Give the template a name you will remember, and press the Save button.**
If you have followed these steps, your template should now be installed.



- 15. Checking your work.** The best way to check your work is to close the patient and open a new one. Then, navigate to Letter Writer | File | New and select the new template. If the patient details have come across, your template is working and ready to go!

