

## Importing Templates into Best Practice

1. Open and login to Best Practice, close the "Open patient" window (if already logged into Best Practice, close all other windows). Click on "Utilities" in the menu, and then on "Word processor".
2. Click on "Templates" in the menu, and then on "Import template". Click on the down box "Look in:" and select navigate to the location where the template was saved from the web site, and double click on the file name. The template should be displayed. To check the template is working properly, click on one of the data fields (identified by the < > brackets) and it should become highlighted in grey.
3. To save the template, click on "File" in the menu and then on "Save". In the "Template name:" field, enter the name you want the template saved as, and if the template is for all users, make sure the "Available to all users" field is ticked. Then click the "Save" button.
4. To save the template, click on "File" in the menu and then on "Save". In the "Template name:" field, enter the name you want the template saved as, and if the template is for all users, make sure the "Available to all users" field is ticked. Then click the "Save" button.
5. Click on "File" in the menu and then on "Close".

## Importing Templates into Medical Director

Templates are usually in the form of a .rtf (Rich Text File) file. **They must not be opened except in Medical Director. To import them into Medical Director:**

1. Right-mouse click on the file and select **Save Target As**. Go to the folder or location on the hard drive of the computer where you want to save it, and select **Save**.
2. Start the Letter Writer module (either from the main menu or from within a patient record by selecting **Tools > Letter Writer** from the menu bar)
3. Click **File > Modify Template** from the Menu Bar
4. Select **Blank Template**
5. Click **Open**
6. Select **File > Import** from the Menu Bar
7. Find and select the template file to be imported, and either double-click on it or press 'open'- this will import the template into Medical Director
8. Modify the layout if required to suit the page
9. Save the template by selecting **File > Save as Template** from the Menu Bar
10. Type in a new name for the template and click on **All Users** or **Current User** depending on who is to have access to the template
11. Click **Save**
12. This will save the template under the **User Defined** tab