

## Installing a Template in Zedmed

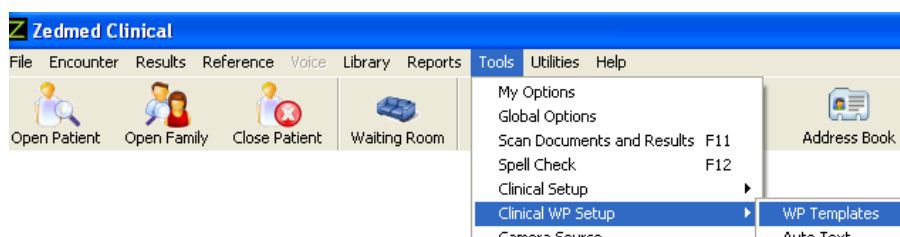
**Note: Right-click to save the file to your computer.**

Click on the Link to the Template and download the document. Right click on the downloaded document, select **show in folder**, right click and copy and paste document to your desktop ready to import.

**Do not open the word document directly. (This will corrupt the fields)**

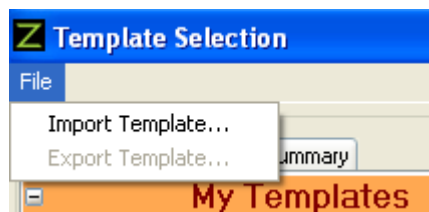
Go to > **Tools** tab

Select > **Clinical WP Setup** then select > **WP Templates**



Template selection box will appear

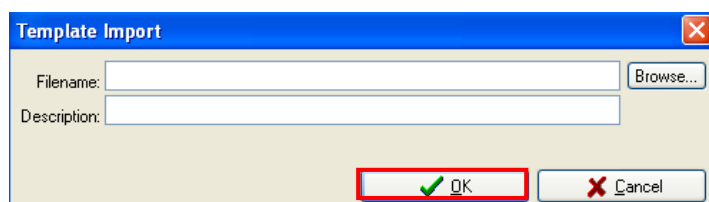
Select > **File > Import Template**



**Template Import** box will open

Browse for the template (rtf doc) you wish to import

**Description** – Name the Referral Template **Sleep WA Dr J Philpott Referral**

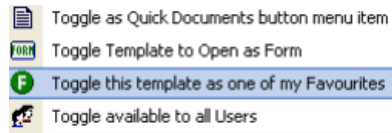


Select > **OK**

Template is now stored under > **User defined** > **My Templates**

Select **Sleep WA Template** > **right click** > select

- **Toggle as quick Documents**
- **Toggle this Template as one of my**
- **Toggle Available to all users**



**Favourites**

## Creating a Contact for Sleep WA Dr J Philpott

Open Zedmed **Clinical** > select **Clinical Records**

Click on **Address Book** icon



Click **Add New** and complete address book contact details below:

**Type of Contact: Referral Doctor**

**Family/Business Name: Sleep WA Dr J Philpott (HL)**

**Preferred Delivery Method:** Select either > **Hardcopy letter & Email** or **Email Only**

**E Send Transport:** Select > **HL7**

**Prefix Subject Line with Letter:** Select > **Yes**

**ESend Email Address:** Click magnifying icon

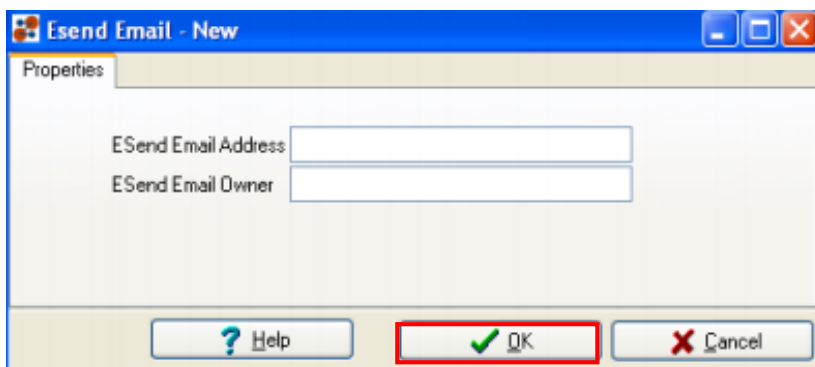


Select EDI code **drphilpo** or select > **Add New** (if EDI not available)

In ESend Email Address add: **drphilpo**

In ESend Email Owner add: **Sleep WA Dr J Philpott**



Click **OK**



## Using the Template and Sending Referral Electronically

Go to a patient file > **Open**

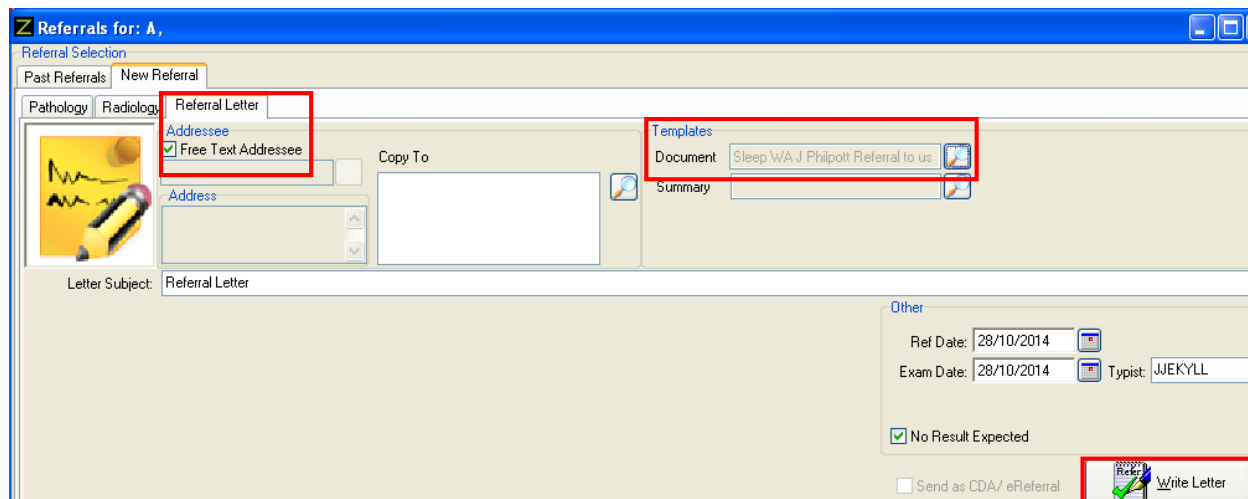
Right click on **Documents** tab to **Open Quick Document Menu** > **Select Sleep WA Dr J Philpott**

(Or open **Start Encounter** green arrow icon >  select **referral letter** tab 

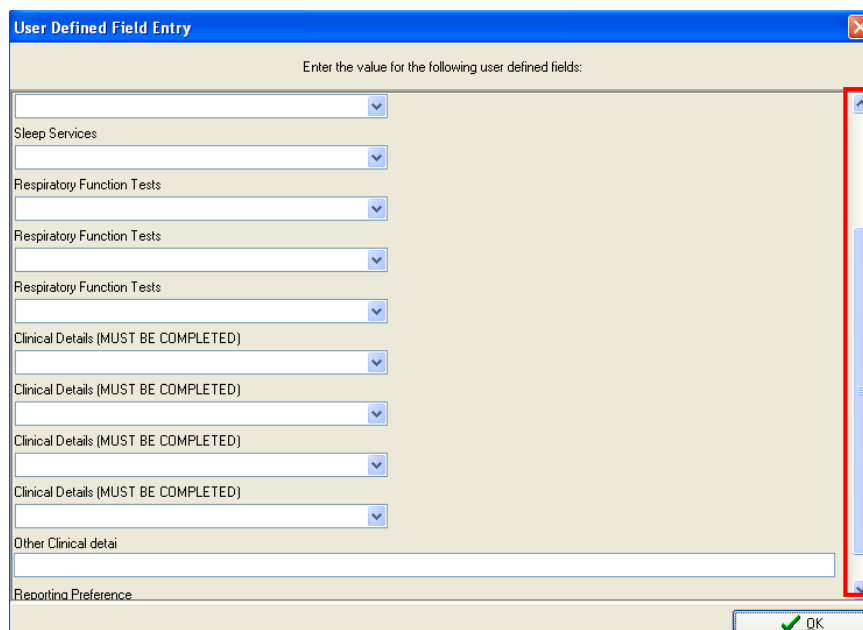
Select > **Referral Letter** > Tick **free text** box

Go to **Templates** > **Document** and browse for template **Sleep WA J Philpott Referral**

Select > **Write Letter** icon > (referral will auto populate with patient details)



**\*\*Follow referral selection prompts and Scroll through all selection criteria**



Select > **OK** and **Save** referral letter

Select > **Print and Close** or **OK** (if no printing is required)

## To Send Referral Electronically

Select > **Distribute icon**

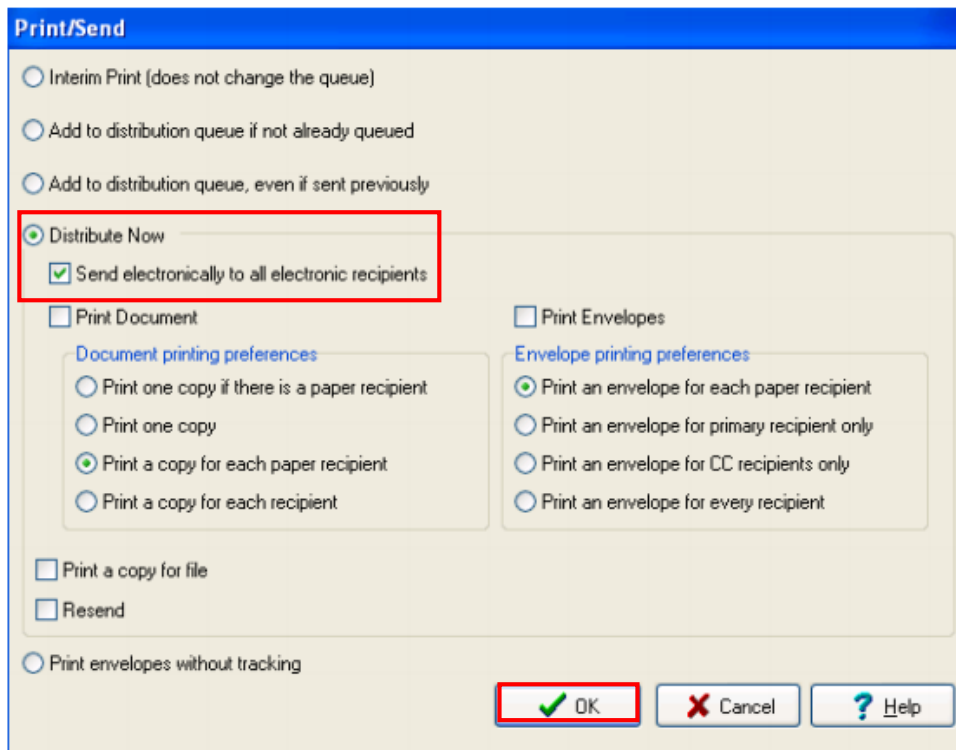


Go to > **Distribute Now**

Tick > **Send electronically**

Untick > **Print Document**

Select > **OK**



**Print/Send**

Interim Print (does not change the queue)

Add to distribution queue if not already queued

Add to distribution queue, even if sent previously

**Distribute Now**

**Send electronically to all electronic recipients**

Print Document

Print Envelopes

**Document printing preferences**

Print one copy if there is a paper recipient

Print one copy

**Print a copy for each paper recipient**

Print a copy for each recipient

**Envelope printing preferences**

**Print an envelope for each paper recipient**

Print an envelope for primary recipient only

Print an envelope for CC recipients only

Print an envelope for every recipient

Print a copy for file

Resend

Print envelopes without tracking

**OK**  **Cancel**  **Help**