

## Installing a Template in Medical Director 3

**Note: Right-click to save the .rtf 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 & paste document to your desktop ready to import.

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

Go to > **Tools** > select > **Letter writer**

Select > **New letter icon**

Select > **Blank template** > **OK**

Go to > **File** > **Import** (Browse to the saved word template document)

Select > **Sleep WA Dr J Philpott Referral file** > **Select Open**

Go to > **File** select > **Save as a template**

Select > **Blank template**

Name the template **Sleep WA Dr J Philpott Referral** select > **Save**

## Creating a Contact for Sleep WA Dr J Philpott

Go to **File** select > **Address Book** click **Add New**

Select **Company** and add

**Name:** **Sleep WA Dr J Philpott**

**Category:** select Healthlink or electronic referral

**Address:** Line 1 and Suburb – Type Nedlands in both

**Post Code:** 6009 and select > **OK**

## Using the Template

Go to **patient file** > **Select a patient**

Select the > **letter writer** icon (notepad icon) click on > **new letter** icon

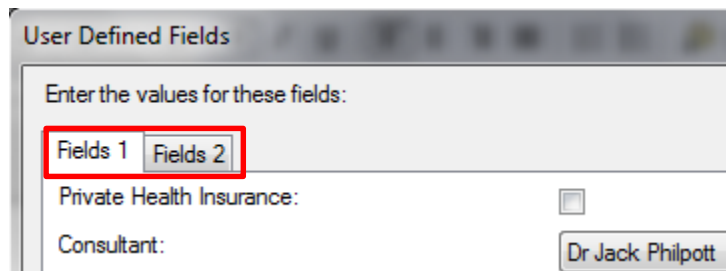


Select > **user defined**

Select the template > **Sleep WA Dr J Philpott Referral** >Select **OK**

Follow referral selection prompts

Enter values into > **Fields 1 and 2**



Select > **OK**

Select > **Print** and select > **Save** (to save document in patient file)

## To Send Referral Electronically

Select the send by MD exchange icon 

A popup box **Send via MDExchange** will appear

**From** > select the **Referring Doctor**


**To** > select **Sleep WA Dr J Philpott**

(In the **Select MDExchange recipient** window enter the **Facility ID: drphilpo** )

Double click on **Sleep WA DR J Philpott** from the list

A popup box will appear titled **Matching Addresses Found**

Click on **Add** to save **Sleep WA Dr J Philpott** to the local address book

(This will save the details to the local address book with the MDExchange  icon next to it)

Click on **Send**