

An Australian Government Initiative

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
- Practix
- 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**.



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Partners 4 Health Ltd (ABN 55 150 102 257), trading as Brisbane North PHN Brisbane North PHN gratefully acknowledges the financial and other support from the Australian Government Department of Health 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.

OP Mental Health Referral ((Item 2710, 2712 or 2713)	
> MD V2 - Mental Health Re	Open	
MD V3 - Mental Health Re	Open in New Tab	
MSWord template - Mental	Open in New Window	
	Save Target As	
Health Assessment - Abo	Print Target	Health C

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



- 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.
- Select folder or desktop where you have saved the template and 4. 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.



Practix

First, make sure you have imported the new template into c:\msp\mspdata\templates

1. Start up PractiX, enter log on details and go into Administration.



2. Next go into **System Configuration**. Select the **plus sign** in the box next to **Templates** then, click **Register Document Templates** and **Modify** at the top right of the screen.



3. Select the down arrow next to **Template Type** to view the pull down menu. Select **Letter/Document Template** then **New** button.



4. Find the file that you imported, click **Open** then 'yes' (if you're asked about replacing the files or anything similar).

Select Templat	ie	? 🛛
Look <u>i</u> n:	C Templates	G 🦻 📂 🛄 -
My Recent Documents		MBF Batch Header MBF Invoice MBP Batch Header MBP Batch Header Medical Certificate A5 Medication Review Pad Mental Health Assessment Mental Health Plan and Review MMental Health Process Mini Mental State Examination
	lungs anterior view	mscontin

5. Practix names the file the same as template name. If you wish you can change the template name, simply type into the **Template Name** box.

Then, in the Use Within box, select the Document Sent box and click Save.

Letter/Document Template Include Inactive templates Template Tree Select a Template New Save Template Name Cancel Edit Template Lifescripts Activity Edit Template Merge Fields Document Filename Merge Fields Copy Template Use Within Document Sent Inactive Imactive	Template Type			<u>C</u> lose
Select a Template	Letter/Document Template	Include Inactive temp	lates	Template Tree
Save Template Name Lifescripts Activity Document Filename Lifescripts Activity Practix 090922.doc Use Within Referral Sent Document Sent Document Received	Select a Template			<u>N</u> ew
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Document Filename Merge Fields Lifescripts Activity PractiX 090922.doc Inactive Use Within Copy Template Referral Sent Document Sent Document Received Summary Document	Lifescripts Activity			Edit Template
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Use Within Copy Template Referral Sent Document Sent Document Received Summary Document	Lifescripts Activity PractiX (090922.doc Inactive		Merge Fleius
Referral Sent Document Sent Document Received Summary Document	Use Within			Co <u>p</u> y Template
Document Received Summary Document	Referral Sent	Document Sent		
	Document Received	Summary Document		

Note: There are several different categories within the **Use Within** box. You need to select the most appropriate box for the document you are importing. If it is a referral, best to tick the **Referral Sent** box. Likewise, if you are importing a health summary template, the **Summary Document** box should be ticked. You can also tick more than one box.

Now that **should** be it. Open up a patient record to and test run by trying to create the document.

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



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

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File Edit Open Macros Spec	ial Help
📕 Edit Template	
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Allergies	
Current Medications	
Current Problems	
Employer Tocurer Details	
Immunisations	
Last Measurement	
Life Events	
Obstetrics History	Hear and Say
Past Hx	Request for Services – Referral Form
Past Hx + Notes	Physe 07 3850 2111
Patient's Address	A Fax 07 3366 1803
Patient Preferred Name	

6. Name the referral and select save.

ZedMed

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MSWord template - Menta	Save Target As	
Health Assessment - Abo	Print Target	Health C

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

GP Partners	Seturn WR Seturn I Itilities	
Reception	Management	Utilities
Patients (F4)		
Waiting Room		
Appointments		
Daily Reports		
Banking		-
Clinical <u>R</u> ecords		

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

File Encounter Desulte Deference Voice Library Depute Tools Utilities Help	
The Encounter Results Reference voice Library Reports Tools Outres hep	
My Options Global Options My Options Scan Documents and Results Fil Open Patient Open Patient Waiting Room Minical WP Setup Address Book Travel Official Setup Address Book WP Templates Auto Text Batch Script Print Batch Script Print Briefcase Mode F7 Batch Script Print Briefcase Mode F7	trading as Brisbane North PH

4. To import the template, click on File and then



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	
Description:	TPCH Outpatient Referral 2.1	
	✓ <u>D</u> K X <u>C</u> ancel	

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.

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File Edit View Insert Format Voice Tools Table		
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«Treating Doctor.Full Address»		
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Patient's Usual G.P. (if different from above):		
Usual G.P. Provider No. (if different from above):		
Patient Details «Patient Demographics.Full Name»		
n Surname: «Patient Demographics. Surname»		Insert Field
Given name: «Patient Demographics. First Name»		Insert Custom Field
Preferred name: <u>«Patient Demographics Popular Name</u> »		v
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