

## eReferral Template

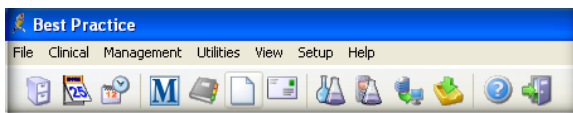
DO NOT OPEN templates from the website.

Right click on the template you require, then left click 'Save Target As'. Save the template to a folder or to your desktop.

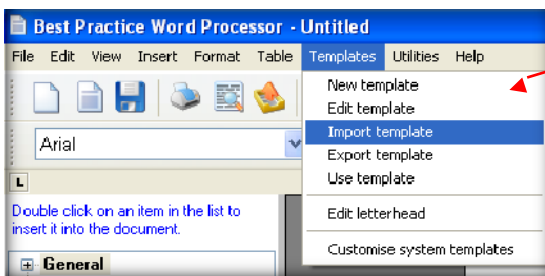
- [Best Practice](#)
- [Medical Director](#)
- [Genie](#)
- [ZedMed](#)

### Best Practice

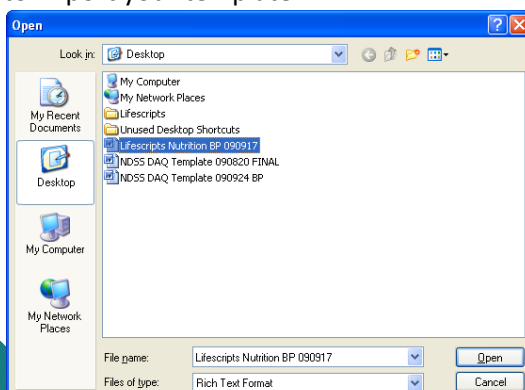
1. When importing a file from a website, **right click** the mouse on the template you want, and then left click **Save Target As**. Save the template to a folder or to your desktop.
2. At the main start screen, open the **Word Processor** by clicking the icon that looks like a piece of paper.



3. Once in the Word Processor, from the main menu, select **Templates**, then **Import Templates**.



4. Select folder or desktop where you saved the template and highlight the template. Click **Open** to import your template.

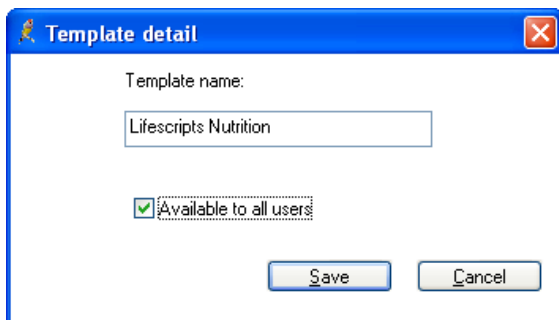


5. Now save your template, select the **Save** icon.



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.

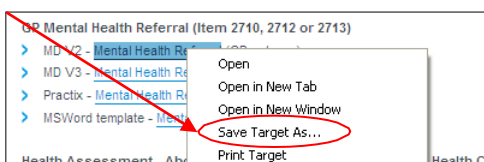


## Medical Director

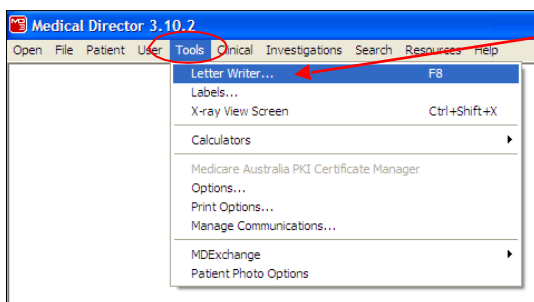
When importing to the Letter Writer templates with merge fields **must be in Rich Text Format (.rtf)**. Create margins to suite: Left 15mm, Right 10mm, Top 5mm, Bottom 5mm

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.

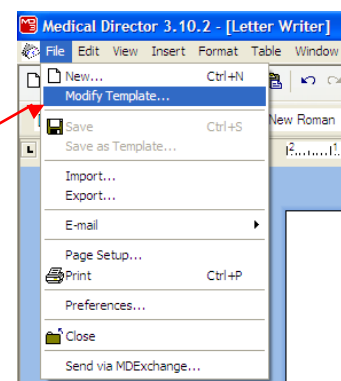
**DO NOT OPEN IN MSWORD.**



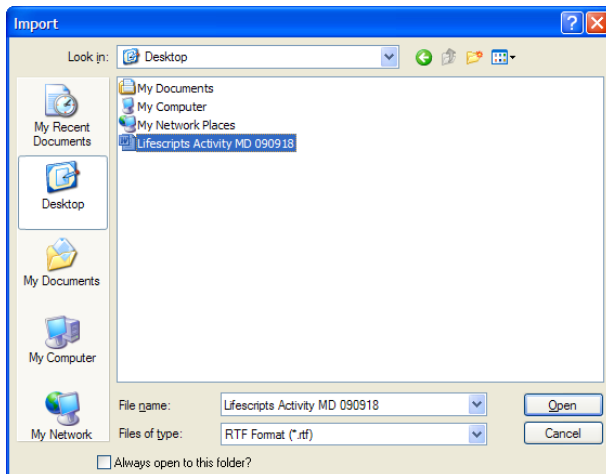
2. Open Medical Director **Letterwriter** via the main menu, pressing **F8** or in a patient's file.



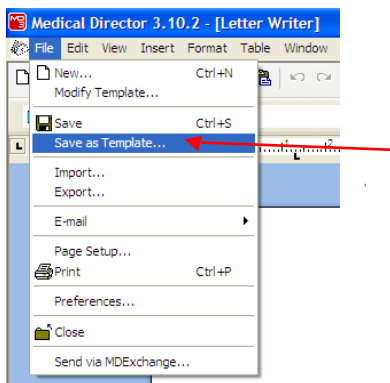
3. Once the Letter Writer is open, click on **File** from the menu bar and select **Modify Template**, then select **Blank template**. Once the blank screen comes back up, again click on file menu and select **Import**.



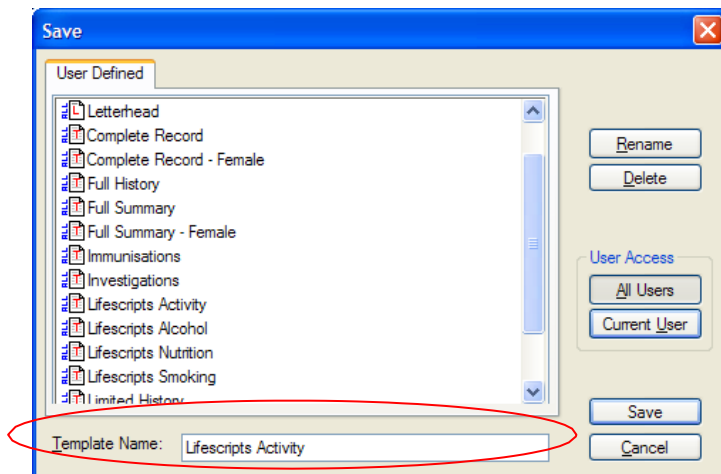
4. Select folder or desktop where you have saved the template and highlight the template. Click **Open**. This will import your template.



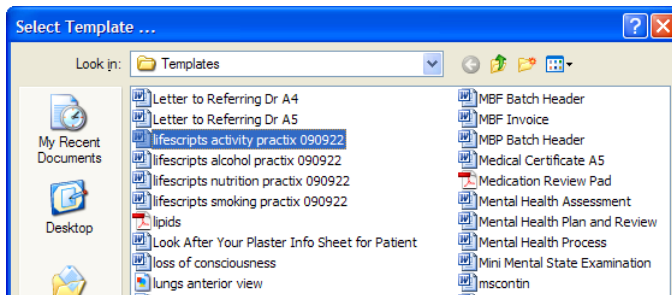
5. Now save your template by going back to the file menu and selecting **Save as Template**.



6. Give your template a name, select **Save** and it is ready for use.

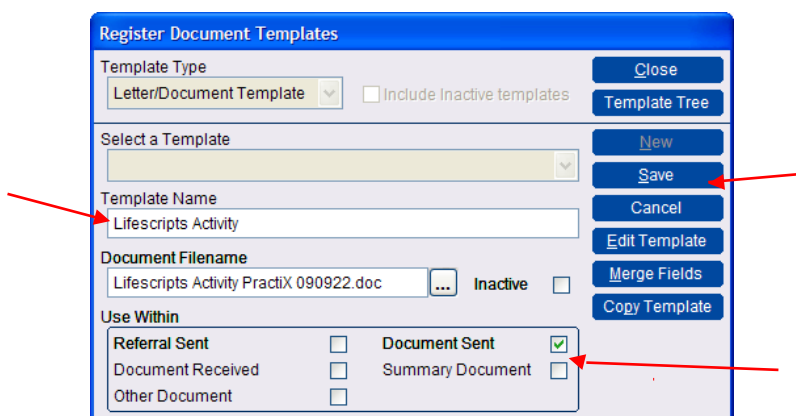


4. Find the file that you imported, click **Open** then 'yes' (if you're asked about replacing the files or anything similar).



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**.



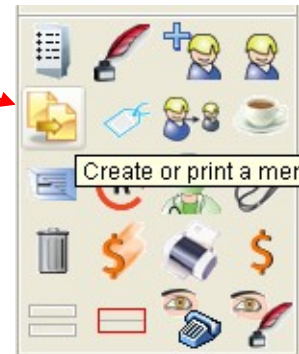
Note: There are several different categories within the **Use Within** box. You need to select the most appropriate box for the document you are importing. If it is a referral, best to tick the **Referral Sent** box. Likewise, if you are importing a health summary template, the **Summary Document** box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

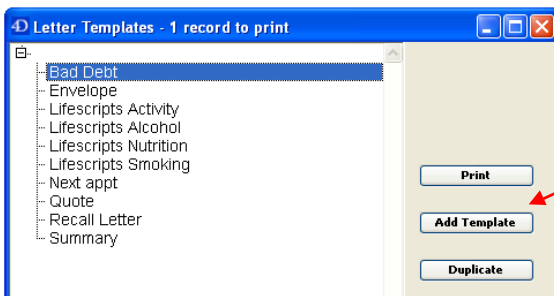
REMEMBER: it has to be either .4w7 or .4wt file formats, or .doc or .rtf formats

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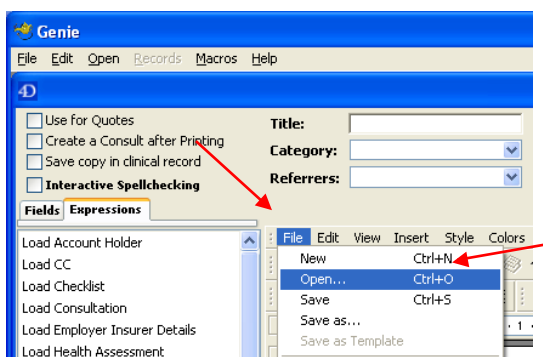
2. From the front page of Genie, click on **Create or print a merged letter template** button.



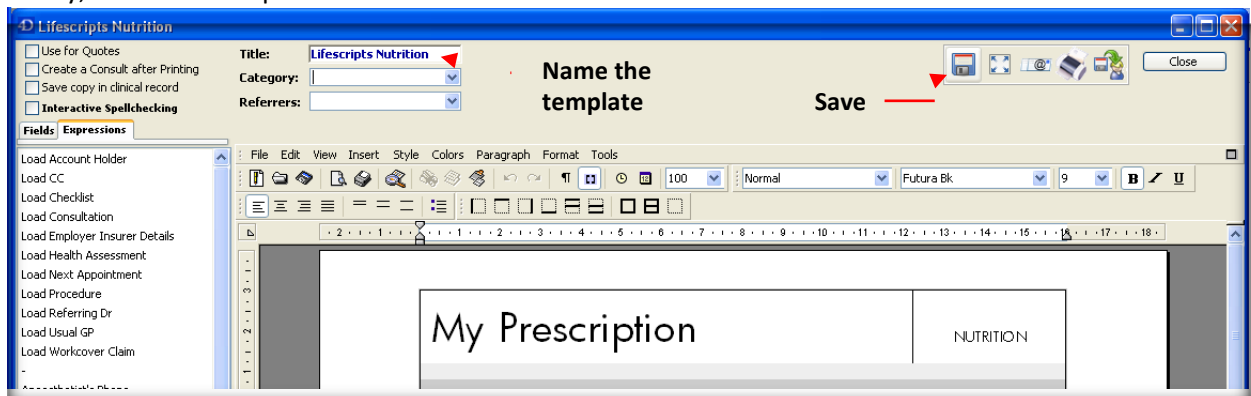
3. To make or add a new template, click on **Add Template** or to edit an existing template, simply click on the template you want to edit.



4. Next, click **File** then **Open** and locate the template you want to import.



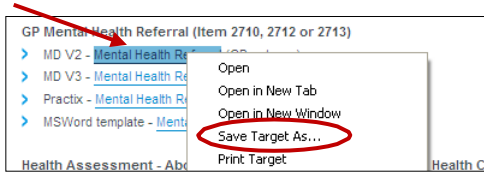
5. Finally, name the template and click **Save**. All done!



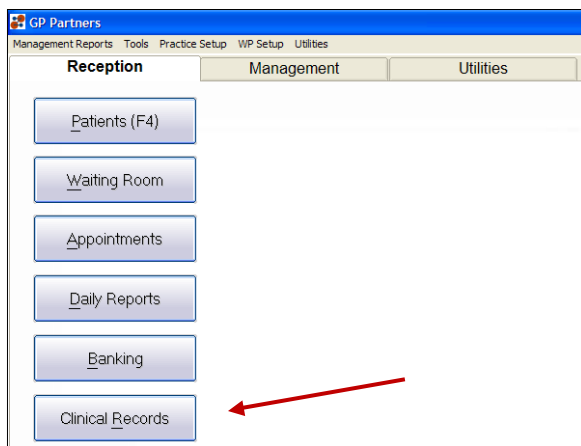
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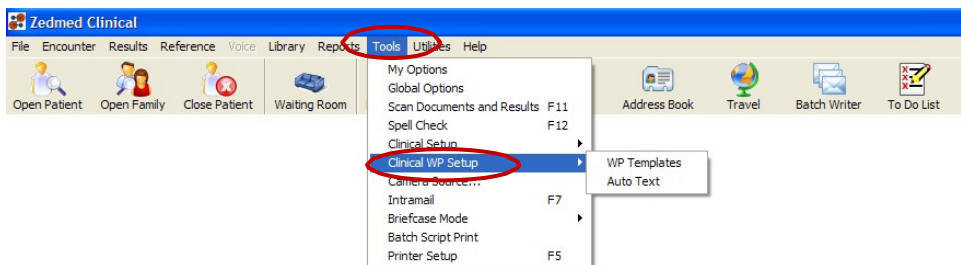
**DO NOT OPEN IN MSWORD.**



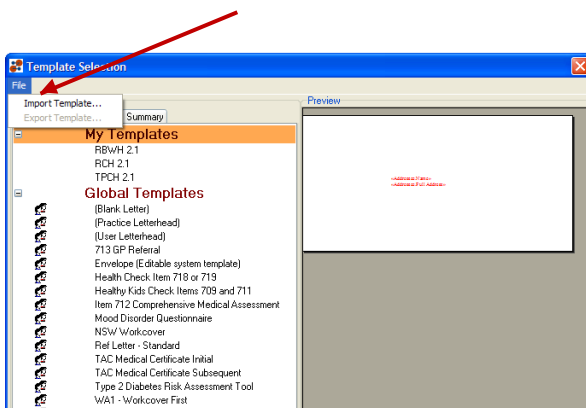
2. Open ZedMed and go to the Clinical component by clicking on **ClinicalRecords**.



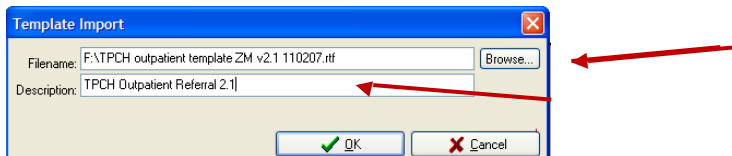
3. Next, to open up the Word Processor to import the file, click on **Tools, Clinical WP Setup**, and then **WP Templates**.



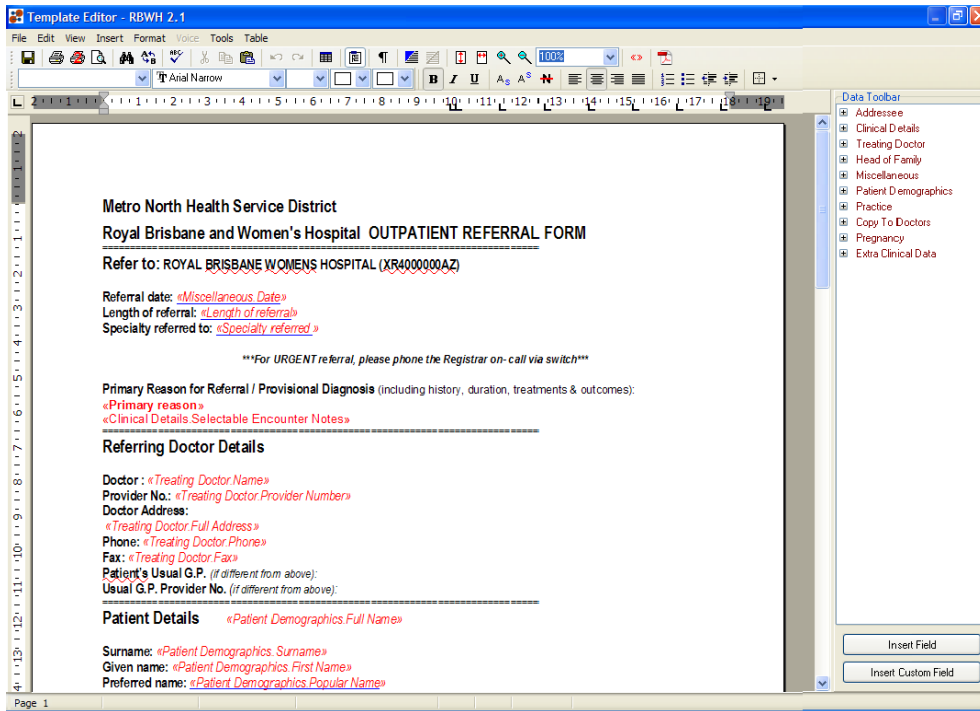
4. To import the template, click on **File** and then **Import Template**.



- 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.



- 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.



## Acknowledgements

Adapted with permission from the original guide produced by Brisbane North PHN [www.brisbanenorthphn.org.au](http://www.brisbanenorthphn.org.au)