



Installing a Template in Medtech

Creating a Template in Document Designer

(Right click on zipped file and select Open and copy the .mtd file to desktop)

Open Medtech > Go to > Set up

Select > Inbox/Outbox

Select > Outbox doc (always check this new referral is not already listed)

Select > Add a new document

Create a new Code for referral in Document Designer:

Make sure you use the same code name as the name used on in the .mtd file

Document Designer

Hearts West Referral (HWEST)

Main | Document | Audit

Details

Code: HWEST

Description: Hearts West Referral

HWEST Hearts West Referral.mtd

- Code > create code for template
- Description > Name Template
- Folder > select Document -DO
- Format > select Word
- Paper Size > Select page Size > A4
- Select > text box 'Word'

Document Designer

Hearts West Referral (HWEST)

Main | Document | Audit

Details

Code: HWEST

Description: Hearts West Referral

Folder: Document (DO)

Format: Word (W)

Cost:

Refer To:

Patient's GP

This Provider

No default Recipient

Printing/Send Details:

Paper Size: A4 Paper (A4)

Internal In-Box Folder: Referrals (REF)

Print Landscape:

Print Logo

Skip Lines: 0

Is Tracked:

Enforce watermark:

Unload Codes:

Unload Ref:

Tasks:

Reminder In:

Task Prefix:

Inactive:

OK Cancel Help



Installing the .mtd file

Select document Tab > Select > Import disk

You are prompted to search for saved .mtd file

Select > OK

Using the Template

Open a patient record

Go to 'Patient manager' or outbox document 'New'

Select > Outbox tab and select document

Select template **(HWEST) Hearts West Referral** and open word document

Fill in patient referral details, close screen and 'Save'