

Managing Clinical Templates

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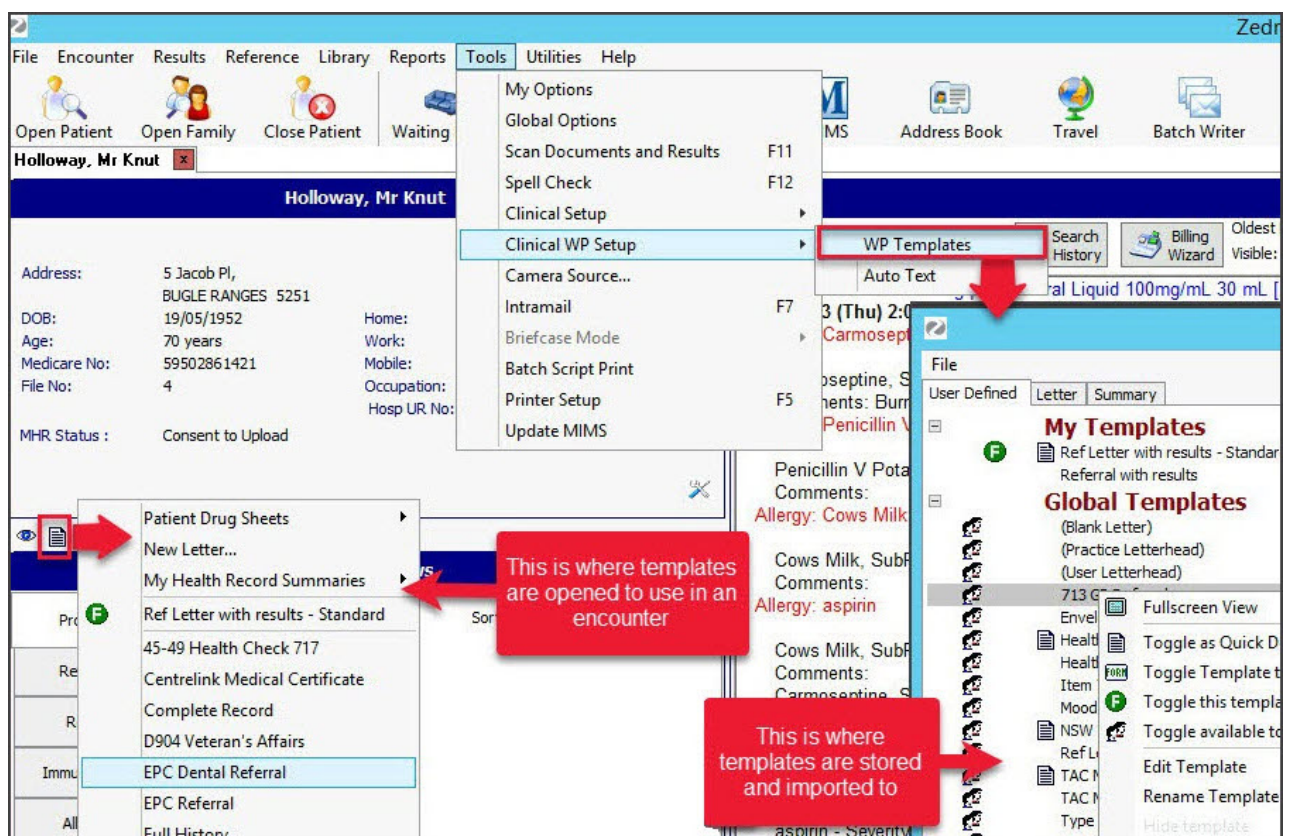
Zedmed comes with an extensive set of clinical templates that can be made available in Quick Documents for consultations. You can also create import templates from Zedmed's website and create and import your own templates.

Summary

Zedmed uses clinical templates for referrals and letters. There are templates bundled with Zedmed, additional templates available on our website, and you can make your own templates and import them into Zedmed. This guide explains how to create and upload a template that you have created yourself and how to download a premade template from the Zedmed Website.

Clinical templates are accessed using the **Quick Documents menu**.

The screenshot below shows 1) how to open the Template Selection menu where you enable the template for Quick Documents, and 2) how to then open Quick Documents to use that template.



Creating a new template

We recommend making new templates by editing a blank template in the WP Template Selector.

To create a template using the Template Selector:

1. Open **Clinical Records**.
2. Select **Tools > Clinical WP Setup > WP Templates**.

The **Template Selection** screen will open.

3. Double-click the <Blank Letter> template.

A blank page will open in the **Template Editor**.

4. Enter the content (write the template text).
5. You can add information as follows:
 - a. Select **View > DataToolbar**.
 - b. Locate the information by expanding the categories.
 - c. Select a space on the letter.

This is where the information will be added from the Data Toolbar.

- d. Double-click the information you want to add.

If the option you selected has no information, nothing will be added.

6. Add any clinical results as follows:
 - a. Select **View > DataToolbar**.
 - b. Expand the section called **Extra Clinical Data**.
 - c. Double-click **Documents, Images** or **Incoming Documents**.

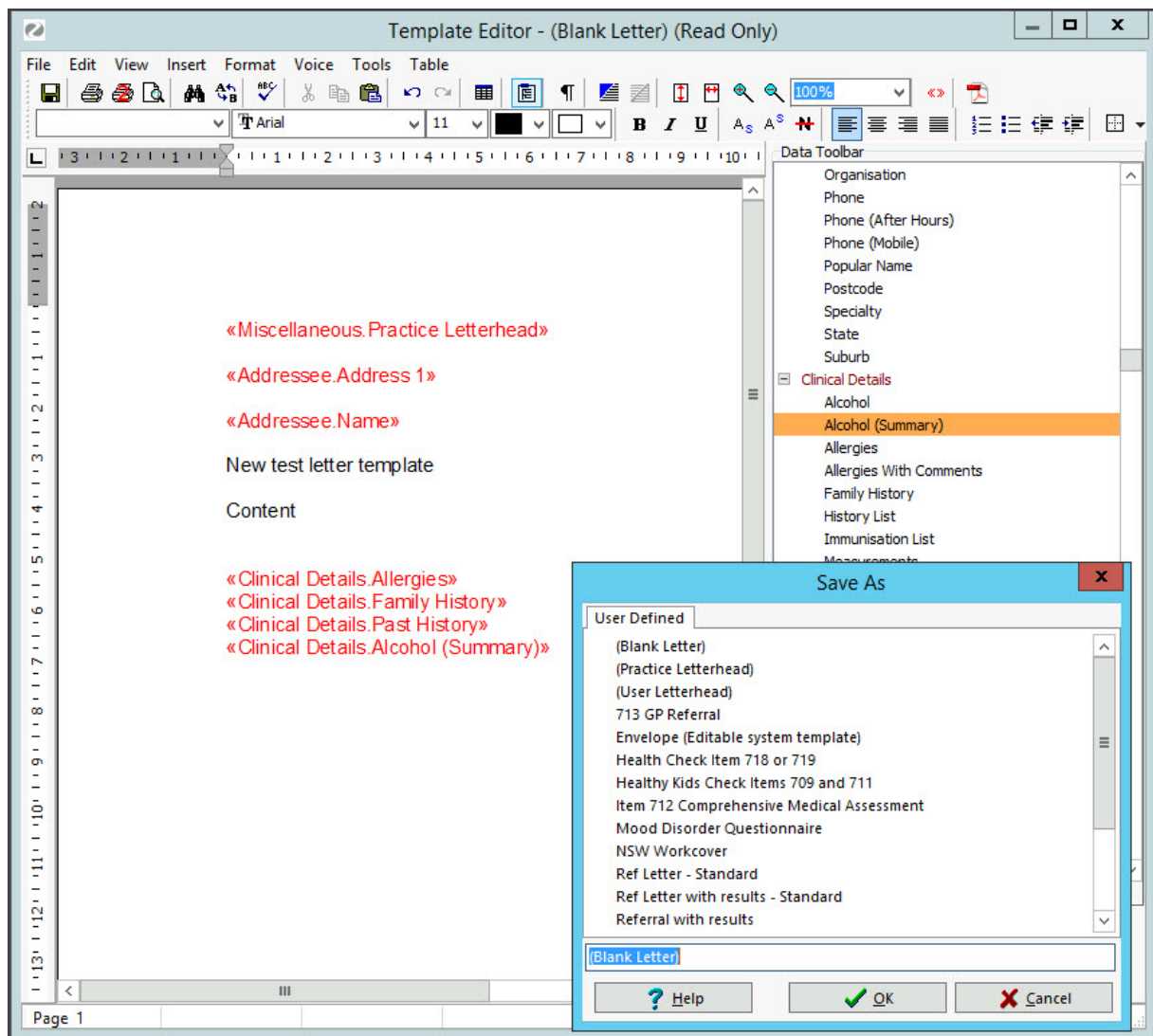
These contain results based on how the results were received by Zedmed.

- d. Select the result you want to attach.
 - e. Click **OK** and the selected item will be attached to the letter.
7. Other options for the letter:

Auto Text can be selected from the **Tools** menu and allows you to add pre-written text to the letter.

8. When you have finished, select **File > Save**.
9. Enter a name for the new template and select **OK**.

The new template will appear under **My Templates**.



Using third-party software to create a template

You can create a template using Microsoft Word and save the template as a rich text format (RTF) file, but with some versions of Word, this process may not work. WP Templates will not accept Word documents and PDFs.

Documents created using third-party software may not be compatible even if saved as an RTF file. If you do create a template using 3rd party software, you must then **import it into Zedmed**.

Editing an existing template

Clinical templates may need to be updated to change information such as a clinic address or add information like a digital signature field. To edit a template, open it and change any required text. You can also highlight and delete merge fields or add new merge fields using the Data Toolbar.

In the example below, we will add the **electronic signature** merge field called 'Signature Image' to a referral letter.

To edit a template:

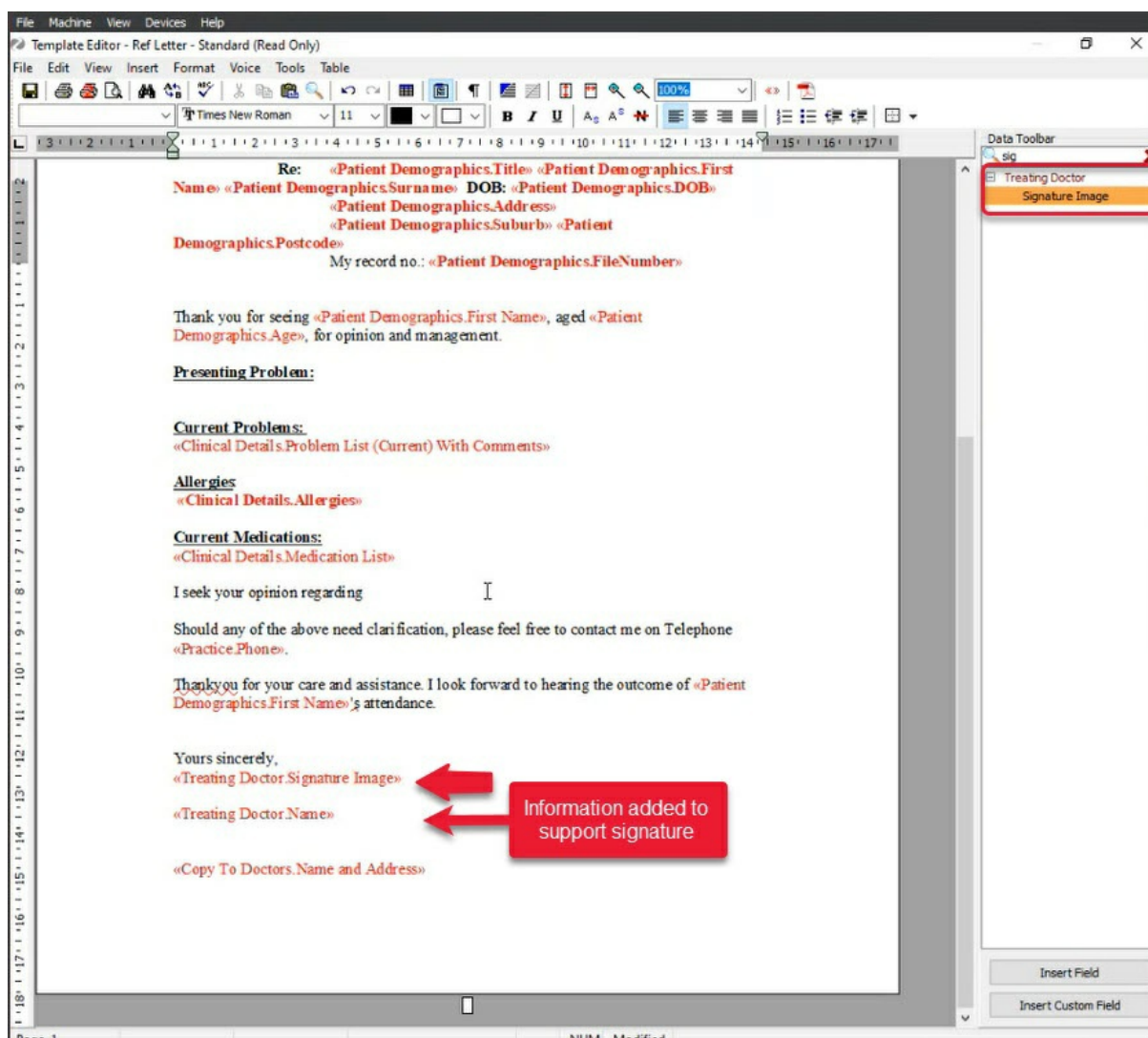
1. Open **Clinical Records**.
2. Select **Tools > Clinical WP Setup > WP Templates**.

The **Template Selection** screen will open.

3. Locate the template to be edited.
4. Double-click the template to open it.
5. Scroll to the location where you want to add the signature.
6. If required, add some text to go with the signature.

For example, 'Yours sincerely', and the 'treating doctor name' merge field.

7. Click on the page where the signature is to go.
8. Select **View > Data Toolbar**.
9. Under the Data Toolbar, locate and expand the **Treating Doctor**.
10. Under Treating Doctor, double-click the **Signature Image** item.
11. When you have finished, select **File > Save**.



Importing new clinical templates

To Import a new template

1. Open **Clinical Records**.
2. Select **Tools > Clinical WP Setup > WP Templates**.

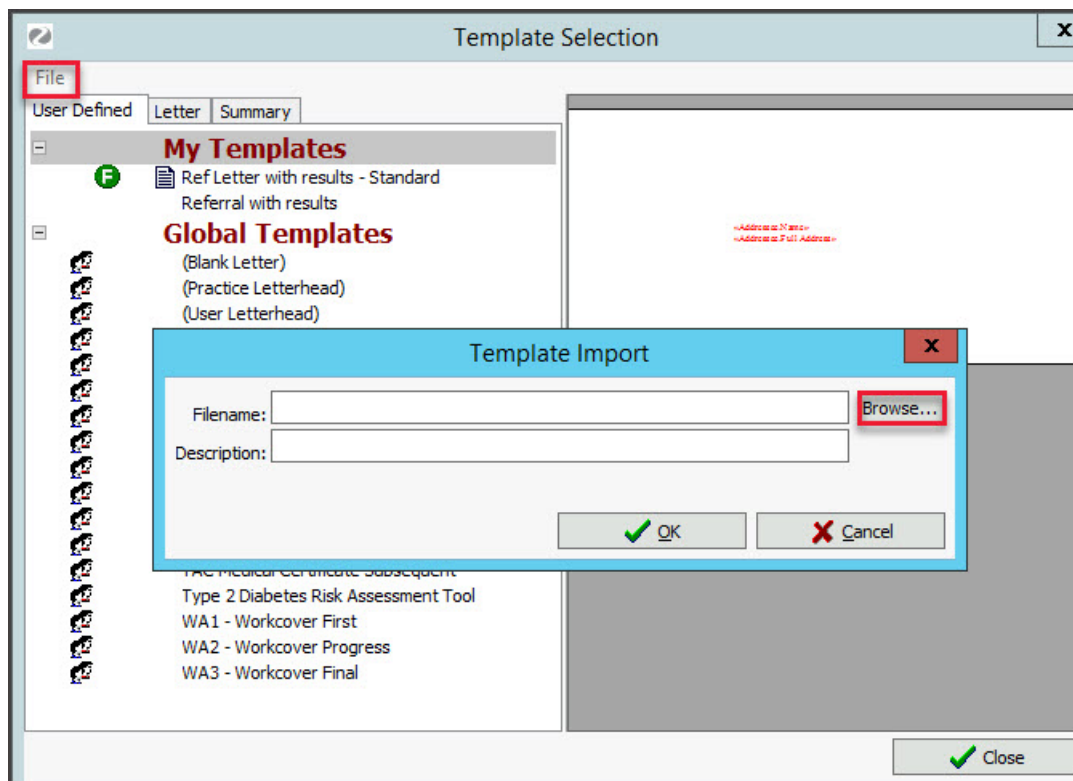
The **Template Selection** screen will open.

3. Select **File > Import Template**.

4. Select the **Browse** button to locate and select the template you want to add.
5. Enter a name for the template into the **Description** field.
6. Select **OK**.

The template will appear under **My Templates** in the Template selection.

You can now add the template to **Quick Documents**.



Importing templates from Zedmed's website

In addition to the templates in Zedmed, there is an extensive selection of templates on the Zedmed website that customers can download and add.

The template categories include:

- Aged Care Specific Aged Care Specific
- ATSI specific ATSI specific
- Child Specific Child Specific
- Chronic Disease Management Chronic Disease Management
- Mental Health Mental Health
- Miscellaneous Miscellaneous
- Official Government Forms Official Government Forms
- State Specific Forms - NSW State Specific Forms - NSW
- State Specific Forms - QLD State Specific Forms - QLD
- State Specific Forms - SA State Specific Forms - SA
- State Specific Forms - VIC State Specific Forms - VIC
- State Specific Forms - WA State Specific Forms - WA

To download a template from Zedmed:

1. Go to www.zedmed.com.au.
2. Select **Login**.
3. Sign in to the **Client Login** portal with your Username and Password.
4. From the **Home** menu, select the **Client Login Area** folder.
5. Select **Clinical Templates**.
6. Browse to locate the template that you want to download.
7. Select the down-arrow icon on the left.

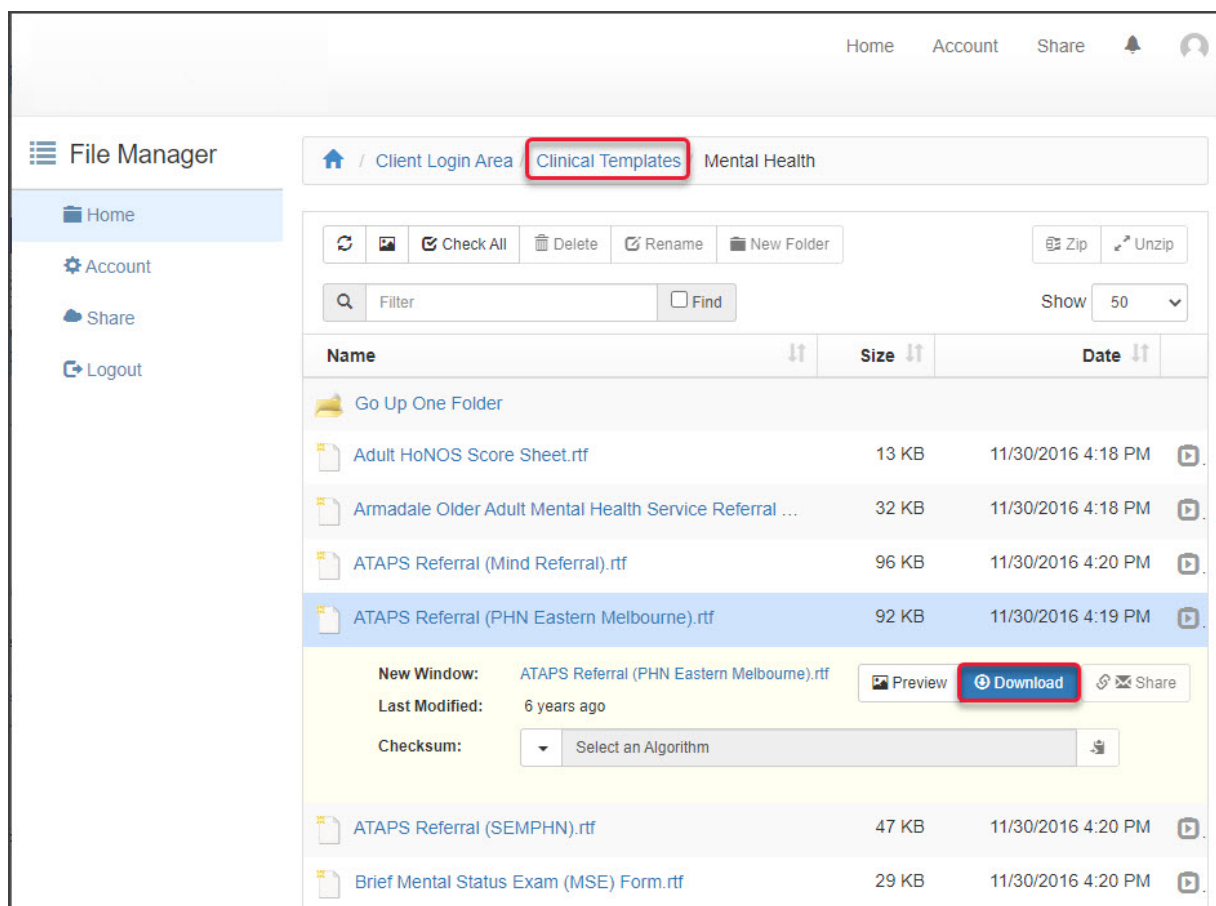
This will expand the file entry and show a **Download** button.

8. Select **Download** and the file will download.

How the file downloads and where it saves will depend on your web browser.

The file's location should be easy to find and accessible to the Zedmed workstation that will use this file. If it is not, copy the file to a more accessible location.

9. You can now import the template using the [instructions above](#).



Configuring templates to appear in Quick Documents

The selections shown in Quick Documents are taken from the full list of documents and templates available in Zedmed. You can customise the list by adding and removing documents.

To edit the document list:

1. Go to Zedmed's **Reception** tab.
2. Select **Clinical Records**.

The **Clinical Records** screen will open.

3. Select **Tools > Clinical WP Setup > WP Templates**.

The **Template Selection** screen will open.

Documents already in Quick Documents will have a page icon next to them

4. Select the category of the document you want to add: **User Defined, Letter** or **Summary**.
5. Right-click the document.
6. Select **Toggle as Quick Documents** button menu item to add or remove the item from Quick Documents.

