

## Instructions for using Medical Director versions of CVC Program tools

Flinders Program™ tools and CVC Care Plans have been created as templates in Rich Text File (RTF) format for use in Medical Director software. Two files are available in this format. You will find them in the Resources list for Module Two:

- Flinders Program™ tools and K 10  
(includes Partners in Health Scale, Cue and Response Interview, Problem and Goals Assessment, Flinders Self-management page and K 10)
- CVC Care Plans  
(includes comprehensive Care Plan and patient friendly version of a Care Plan.)

### Importing Templates into Medical Director

1. Right-mouse click on the file name. A dropdown menu displays.
2. Select *Save Target As*. The computer folders and files on your hard drive will display.
3. Select the location in which you would like the file to be stored. Click *Save*.
4. Start the Letter Writer module (either from the main menu or from within a patient record by selecting *Tools > Letter Writer* from the menu bar)
5. Click *File > Modify Template* from the Menu Bar.
6. Select Blank Template
7. Click *Open*
8. Select *File > Import* from the Menu Bar
9. Find and select the template file to be imported, and either double-click on it or press 'open'- this will import the template into Medical Director
10. Modify the layout if required to suit the page
11. Save the template by selecting *File > Save as Template* from the Menu Bar
12. Type in a new name for the template and click on *All Users* or *Current User* depending on who is to have access to the template
13. Click *Save*. This will save the template under the *User Defined* tab

### Creating a letter or document from a template

1. Open Letter Writer from within a patient record.
2. Select *File > New* from the Menu Bar
3. Highlight the template to be used under the *User Defined*, *Supplied* or *Summaries* tab and click OK
4. Respond to any prompts for addressees, dates, drop-down boxes, etc
5. Check the completed letter or document and make any changes required
6. Save the letter in the patient's file by selecting *File > Save* from the Menu Bar or clicking the *Save* icon on the Toolbar
7. Complete or modify the Letter Details
8. Click *Save*.
9. To print the letter, select *File > Print* from the Menu Bar, or click the *Print* icon on the Toolbar.

## Modifying Templates

1. Open Letter Writer from the main menu or from within a patient record
2. Select *File > Modify Template* from the Menu Bar
3. Select the template to be changed (or Blank Template to create a new one)
4. Make the required changes to the template
5. Save the template by selecting *File > Save as Template*
6. Either save the template with the same name or type a new name and click *Save*.

## Adding or Deleting Rows in a Table

Some information in templates is set out in tables. These can be distinguished by the lines surrounding the text.

Text can be added or deleted within the boxes in the normal way.

Rows can be removed by placing the cursor in the row to be deleted and choosing *Table > Delete > Row* from the Menu Bar.

Rows can be added by placing the cursor in the row adjacent to where the row is to be inserted and choosing *Table > Insert > Row above/Row below* from the Menu Bar.

Moving within a table is done by clicking in a cell with the mouse, by using the arrow keys, or by using the *Tab* key to go forward and *Shift plus Tab* to go back.

## Auto Text

Auto text is used to save time by storing frequently used phrases or paragraphs.

### To create an entry in Auto Text:

1. Select *Edit > Auto Text* from the Menu Bar
2. Click on the *Add* button
3. Type the text in the *Auto Text* box and a shortcut on the *Shortcut* box
4. You can cut and paste from another document into the text area
5. Click *OK*.

### To insert Auto Text into a letter or document

1. Position the cursor where you want the text and type the shortcut
2. A popup box with the Auto Text will appear. Press *Enter* to add the Auto Text to your document. To ignore the Auto Text, keep typing
3. If you cannot remember the shortcut, select *Edit > Auto Text* from the Menu Bar, highlight the shortcut from the list, and click *Insert*.