


Importing a template using **Template Manager**:

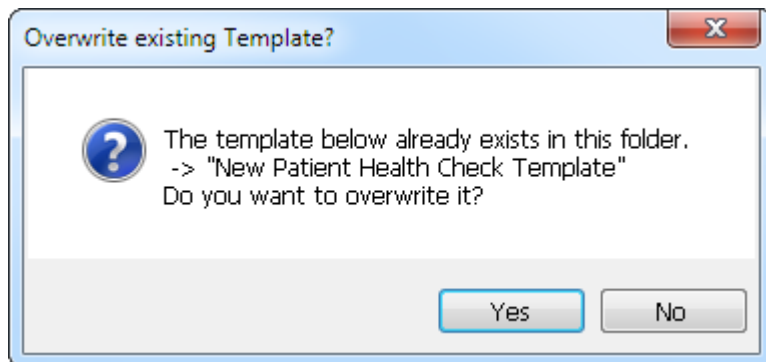
Top Tips:

- Do not open the referral form file prior to import.
- When downloading, choose "Save As" and save the file directly to the desktop (or another folder).
- Import the file straight into EMIS from that saved location.

This will keep all merge fields intact so all values populate correctly.

1. To access Template Manager, click  , point to Configuration, and then select Template Manager.
2. In the navigation pane, click the Document Templates tab, as required.
3. Select the folder where you want to save the imported template and then, on the ribbon, click Import.
4. On the Open screen, navigate to and select the required template, and then click Open. The template is imported to the selected folder.

If there is an existing clinical template with the same name as the template you are importing, the following screen is displayed.



Do one of the following:

- To import the clinical template and overwrite the existing template, click Yes.
- To cancel the import, click No