TEMPLATE INSTRUCTIONS

Importing Templates into Best Practice

Templates are usually in rtf (Rich Text File) format.

Please note: **They must not be opened except in Best Practice. To import them into Best Practice:**

1. Right-mouse click on the file and select **Save Target As**. Go to the folder or location on the hard drive of the computer where you want to save it, and select **Save**;
2. Start the Letter Writer module (either from the main menu or from within a patient record by selecting **Correspondence Out > Add** from the menu bar);
3. Click **Template Menu > Import Template** from the Menu Bar. Find and select the template file to be imported, and either double-click on it or press 'open' - this will import the template into Best Practice;
4. Modify the layout if required to suit the page;
5. Save the template by selecting **File > Save as;**
6. Type in a new name for the template and tick on **All Users** depending on who is to have access to the template;
7. Click **Save;**
8. This will save the template under the **Custom** tab.

Using Templates

To create a letter or document based on a template, you must open Letter Writer from within a patient record:

1. Select **File > New Document** from the Menu Bar;
2. Highlight the template to be used under the **All**, **Custom and Supplied** click **OK;**
3. Respond to any prompts for addressees, dates, drop-down boxes, etc;
4. Check the completed letter or document and make any changes required;
5. Save the letter in the patients file by selecting **File > Save** from the Menu Bar or clicking the Save icon on the Toolbar;
6. Complete or modify the **Letter Details;**
7. Click **Save**.

To print the letter, select **File > Print** from the Menu Bar, or click the **Print** icon on the Toolbar.

Modifying Templates

To make changes to a template:

1. Open Letter Writer from the main menu or from within a patient record
2. Select **Templates > Edit 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**
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 +Tab** to go back.

Auto Fill

Auto text is used to save time by storing frequently used phrases or paragraphs.
To create an entry in Auto Text:

1. Select **Insert > Auto Fill** from the Menu Bar;
2. Click on the **Add** button;
3. Type the text in the **Auto Fill** 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. If you cannot remember the shortcut, select **Insert > Auto Fill** from the Menu Bar, highlight the shortcut from the list, and click **Insert**.