

Best Practice Template Instructions

Importing Templates into Best Practice

Templates are usually in the form of a .rtf (Rich Text File) file. **They must not be opened except in Best Practice.**

To import them into Best Practice:

- 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.**