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:
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.**