



Installing a Template in Best Practice

Note: Right-click to save the file to your computer.
Do not **open the word document directly**. (This will corrupt the fields)

Select > New letter icon (open word processor)

Select > Templates Tab

Scroll to > Import Template

Browse to the saved word template document

Select Template document > Select Open

Select 'Save' icon

Name Template and tick 'Available to all users'

Click > Save

Using the Template

Go to patient file

Select a test patient

Select the 'New letter' icon

Go to the 'Templates' tab

Scroll to 'Use template' > Select template **Hearts West Referral** > Open

Follow referral selection prompts

Select > Print icon

Select > Save icon (to save document in patient file)