



Installing a Template in Practix

Open word template > save as 97 – 2003 word doc on your desktop

Open Practix > Admin

Go to System Configuration > Templates > Registered Document Templates

Select > 'letter / document' Template

Go to > Create New > Import

Click > Select > and Select template (saved to desktop)

Click > Open > Rename template

(If you wish to add fields > Activate developer tabs

Remove protection > mail merge > Start as a normal word doc > add fields > enforce protection)

Tick 'Referral Sent'

Select > Save

Using the Template

Make sure the referral company/individual is created in 'Contacts'

Go to 'Health Records' > Select > 'Search'

Type in patient name > Select 'Search'

Select > 'New Consultation'

Select > 'Write referral'

Select > 'Referral Template' **Hearts West Referral**

Select > 'Contact' for referral > Create referral document

Select > 'Health Summary to Merge' (Dr to select any additional fields to add to referral)

Select > 'Create Document'

Select > Print > and 'Release' (to save document in Practix)