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# **Creating templates in Best Practice**

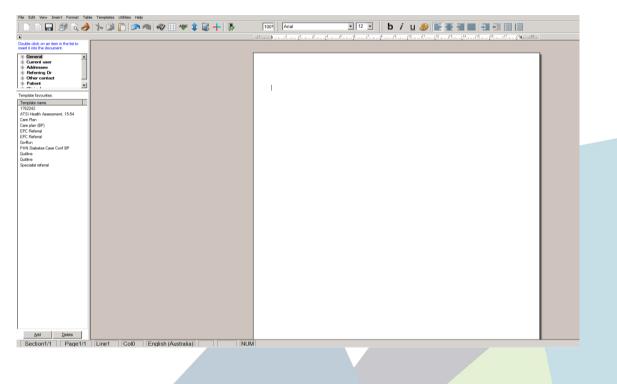
1. From the Main screen, select **Utilities** and click on **Word processor** or press the letter icon or the **F4** key.

File Clinical Management	Utilities View Setup Help	
🔋 🍳 🚱 M	Search Stored prescriptions Prescription lookup	Ctrl+S F9 🗿 🧗
	Word processor	F4

The word processor can also be opened from within a patient record. When in a patient record, select **File > New Letter**.

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0	File Open	Request	Clinical	View	Utilitie
	Open pati	Alt+F2			
	Jump to p	F2			
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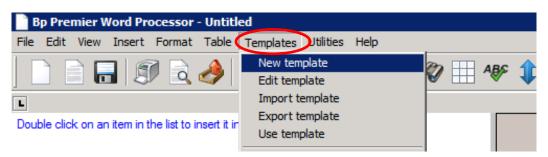
2. You should now see a blank untitled document open in the word processor.





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3. Go to **Templates** and click on **New template**.



4. A blank document will be displayed. The Template Fields toolbar containing the available field categories is displayed on the left.

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uble click on an item in the list to insert it into the document.						
General	_					
Current user						
Doctor						
- Full details						
Name						
First name						
Sumame						
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Provider No.						
Prescriber No.						
Registration No.						
- Health Identifier						
CPD No.						
Doctor's ABN						
Full address						
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Fax						
E-mail						
Mobile phone						
- Pager						
Addressee						
© Referring Dr © Other contact						
·· Other contact ·· Patient						
·· Clinical						
- Reminder letters						
·· Custom						

5. Position the cursor where the field is to be inserted and double-click the field name that you wish to insert into the template. Template fields will show in a template with brackets around them eg. <Letterhead> <CurrentRx>.

Note These codes cannot be typed, they must be inserted using the supplied list.						
SWSPHN	Authorised by: Director of In Page <b>2</b>		V1.0 August 2018			



- 6. Add content to the template as necessary. This could include text, tables, images, letterhead and data fields.
- 7. Click on File and select Save.

Bp Premier Word Processor - Untitled							
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Open file	Ctrl+C						
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- 8. Enter a name for the template and click on **Save**. The template has now been saved in 'Word Processor templates' under 'Custom' tab.
  - Available to all users: If ticked, the template will be available to everyone on your network. Otherwise, it will be available only to the user who created them.

Template detail	×
Template name:	
Hospitals Referral Form	
Available to all users	
Save	Cancel

### Tips when creating templates

• Using tables

Tables can assist with the layout of the document. However, be careful when using certain templates fields that themselves become tables. Examples of these fields are past medical history template, allergies, current and past medications, immunisations, observations, attendances dates, etc.

In these cases, it is recommended that these template fields are *not* put into tables. This is because these fields expand across the width of the page giving no room for the table cell. If you have to put it into a cell, make sure that the table is one cell wide with a full-page width and that the margins are set to zero all around. To do this click into the cell and select Table > Properties. The cell margins are at the bottom of the screen.



#### • Custom fields

The custom fields allow users to customise their templates by double clicking the 'Custom field' An Australian Government Initiative

When using a template, the order that the custom fields are displayed in is the order on the template is the order they will appear on the data entry screen. Therefore, it is a good idea to try to keep things linear down the page to make the data entry flow better.

For more information on how to create an advanced template in Best Practice, click here.

#### • Deleting fields

To delete a template field, click on the field - the cursor should change to an 'Up arrow' and the field will be highlight in grey. Press the 'Delete' button on your keyboard.

#### • Using Tabs in table cells

The 'Tab' key moved between cells in a table. If you want to insert a table between data in a cell, use 'Shift + Tab' instead.

#### • Font size

Use a size 10 font would give a much better look to the template.

#### • Images and objects:

Ensure any images have been optimised for size and colour in a graphic program prior to use in the Word processor. The image resolution should be as small as possible to conserve disk space (no more than 100kb - smaller if possible).

#### • Template margins

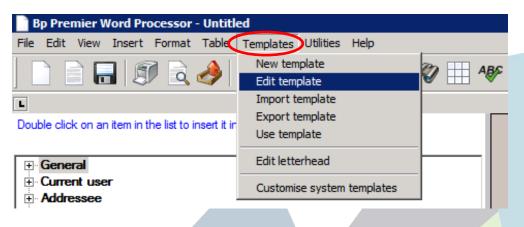
Keep the left margin no smaller than 10mm otherwise data may be cut off on the left when printing.

#### • Reinventing the wheel

Before starting to create your new template, do a Google search to see if someone else has already created one and made it available. Many PHNs have websites which have comprehensive lists of templates. If there isn't one formatted for Best Practice, you could use the Medical Director one as these can be imported successfully.

## Modifying Existing Templates in Best Practice

1. From the Word Processor main menu, select **Template** then **Edit template**. Highlight the template to be edited and press the button.





2. Select the template you wish to modify from those available and click the **Open** button to confirm your selection.

C All C Custom C Supplied	All users	Ide all states	
Panyax consent form	Yes	Type  Supplied	
PCEHR Assisted Reg Adult	Yes		
-	Yes	Supplied Supplied	Alexandra
PCEHR Assisted Reg Child			-FtFullName-
QHealth Matemity	Yes	Supplied	ATESNA ATESNA ATESTICASAN
QLD Patient Travel Subsidy Scheme	Yes	Supplied	Des «Pitroblane»
QLD Respiratory Service Referral	Yes	Supplied	Our records do ow that you are due to see the doct or Br +R criticie Seas cri-
QLD Schedule 8 Drug Reporting	Yes	Supplied	Could you please ring the practice on +UetRone+ to make an appointment.
QLD Sports & Spinal Physio	Yes	Supplied	Yours faithfully
QLD Work capacity certificate	Yes	Supplied	
Qld WorkCover	Yes	Supplied	«DerName» for «RominderDeder»
QLD Workers Compensation Medical Certificate	Yes	Supplied	
RACGP - IMPLANON NXT - checklist & consent form	Yes	Supplied	
RediMed - Hand, Plastics & Reconstructive Surgery	Yes	Supplied	
Reminder letter	Yes	Supplied	
ResSleep QLD Referral	Yes	Supplied	
Sleep Apnea Healthy Sleep Referral	Yes	Supplied	
Sleep Apnea@home - Sleep Management Group	Yes	Supplied	
Sleep Study - Bulk Billed - ResSleep Brisbane	Yes	Supplied	
Sleep Study Referral (Cleveland)	Yes	Supplied	
Snore Sleep Referral	Yes	Supplied	
Specialist referral	Yes	Supplied	
Sports & Spinal referral	Yes	Supplied	
Symbicort Action Plan	Yes	Supplied 🚽	

- 3. Make modifications to the template as necessary. You can change the required text to suit your requirements, add new template fields or replace existing template fields as required using the tree to the left-hand side of the screen.
- 4. Select **File** and click on **Save as** to save the template.

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	Blank document New document Open file	Ctrl+N Ctrl+O	i i i i i i i i i i i i i i i i i i i
	Save	Ctrl+S	insert it into the document.
	Save as		
	Save in database		
	Save as file		

- 5. The **Template Detail** dialog box will be displayed showing the previous name of the template. You can save as current name or type the new name into the **Template name** field.
  - Available to all users: If ticked, the template will be available to everyone on your network. Otherwise, it will be available only to the user who created them.



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🤾 Templa	te detail	X
	Template name:	
$\rightarrow$	Hospitals Referral Form	
	Available to all users	
	Save Cancel	

**Note** Best Practice will not allow you to save changes to a 'supplied' template. The system will prompt you for a new template name. Be sure you advise relevant staff of the correct template to be used.

#### REFERENCE

Bpsummit.com.au. (2018). [online] Available at: http://www.bpsummit.com.au/BP\_FAQ-BPtemplate.pdf [Accessed 6 Aug. 2018].