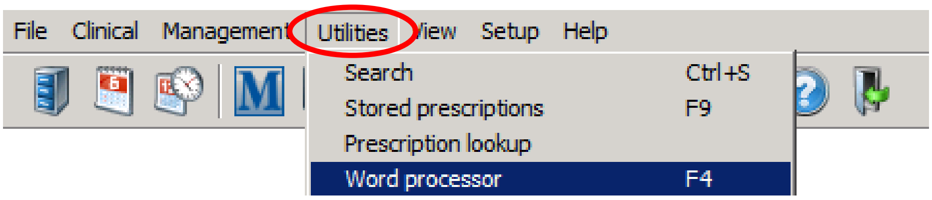
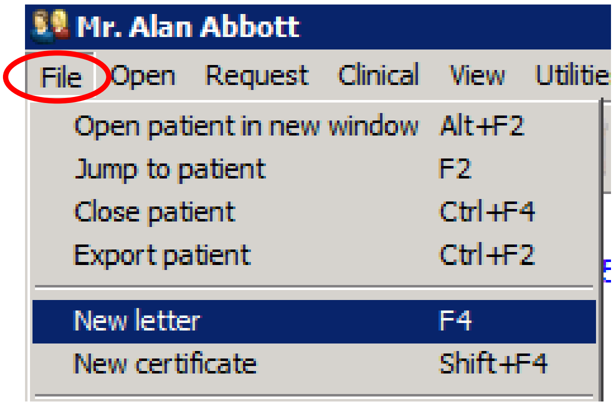
Creating templates in Best Practice

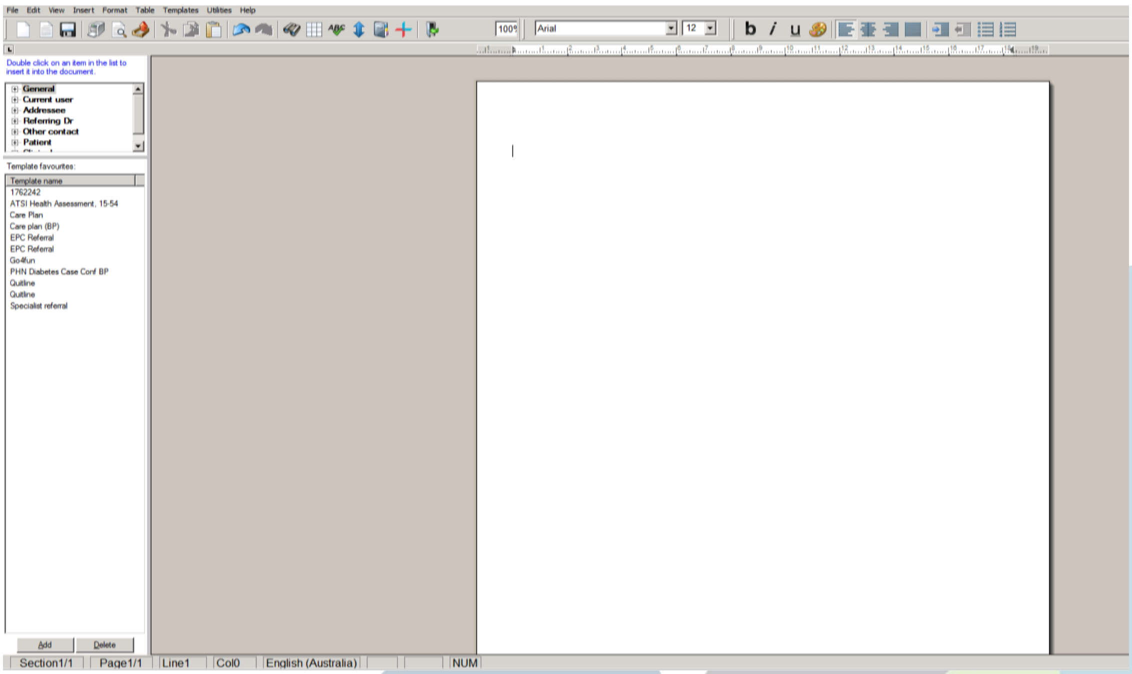
1. From the Main screen, select **Utilities** and click on **Word processor** or press the letter icon or the **F4** key.



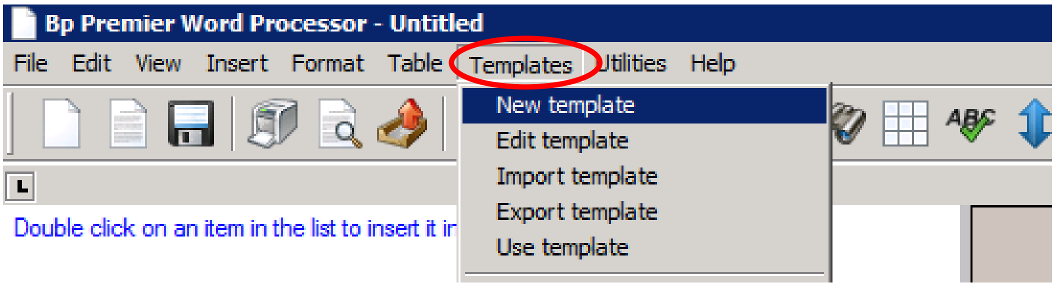
The word processor can also be opened from within a patient record. When in a patient record, select **File** > **New Letter**.



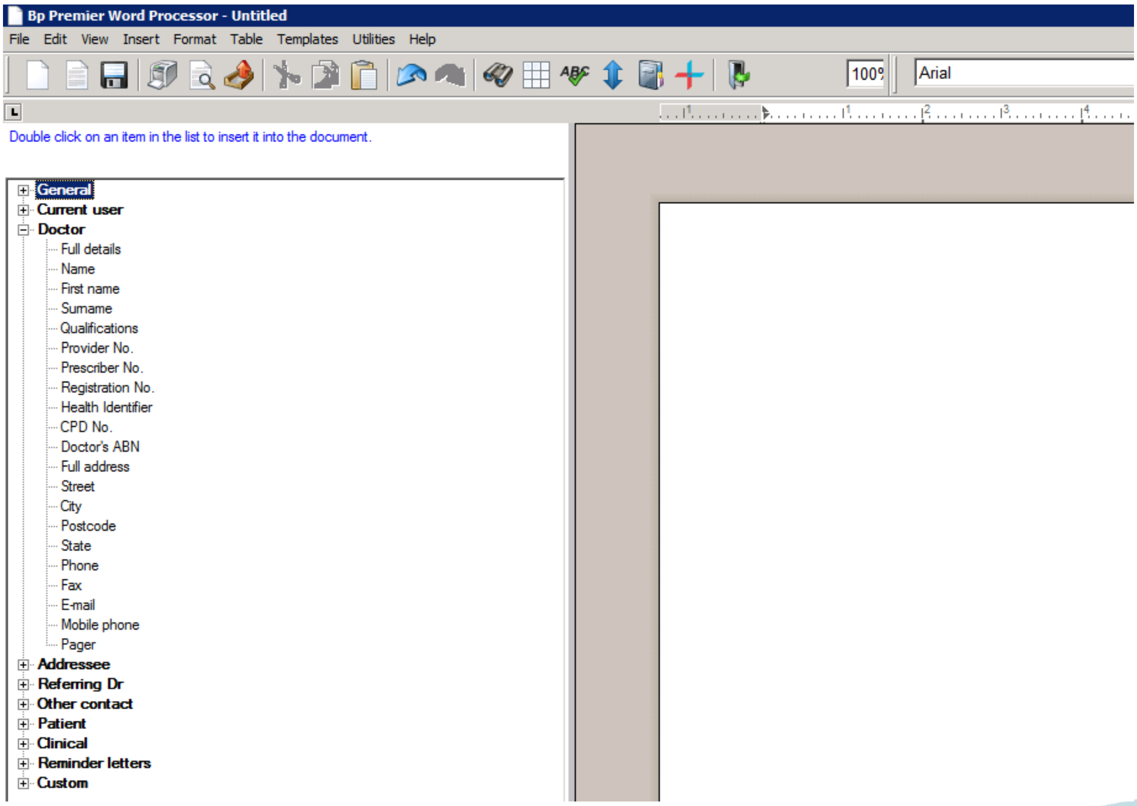
2. You should now see a blank untitled document open in the word processor.



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.

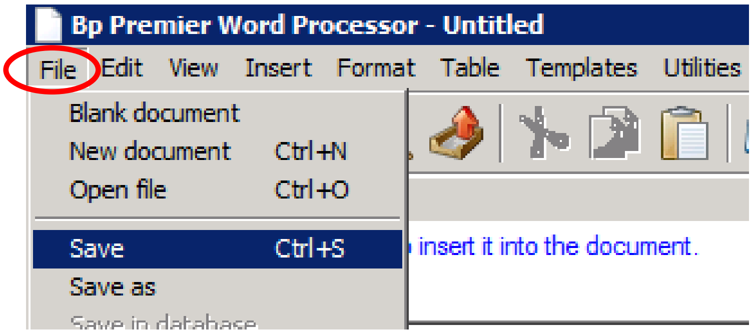


5. Position the cursor where the field is to be inserted and double-click the field name that you wish to insert into the template. Template fields will show in a template with brackets around them eg. <Letterhead> <CurrentRx>.

Note *These codes cannot be typed, they must be inserted using the supplied list.*

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**.



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.

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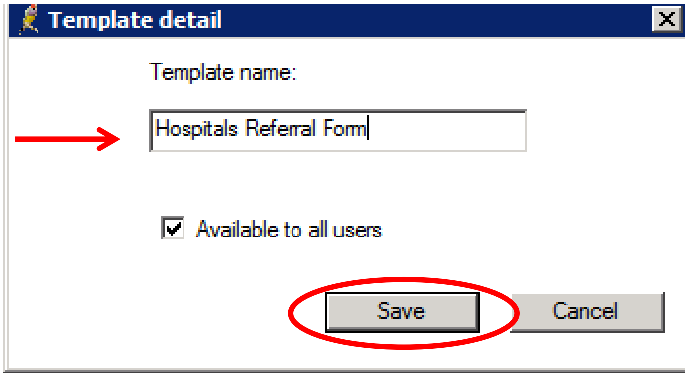


Tips when creating templates

- **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' section at the bottom of the list of template fields.
  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.

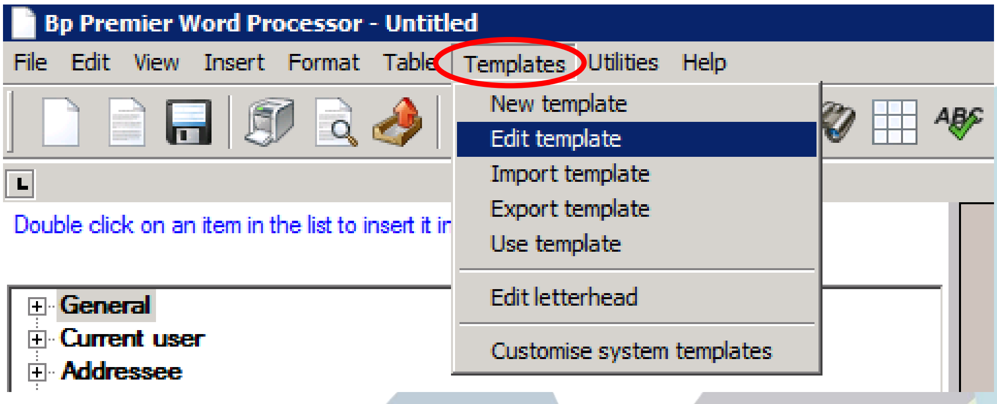
- **Images and objects:**
  Ensure any images have been optimised for size and colour in a graphic program prior to use in the Word processor. The image resolution should be as small as possible to conserve disk space (no more than 100kb - smaller if possible).

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

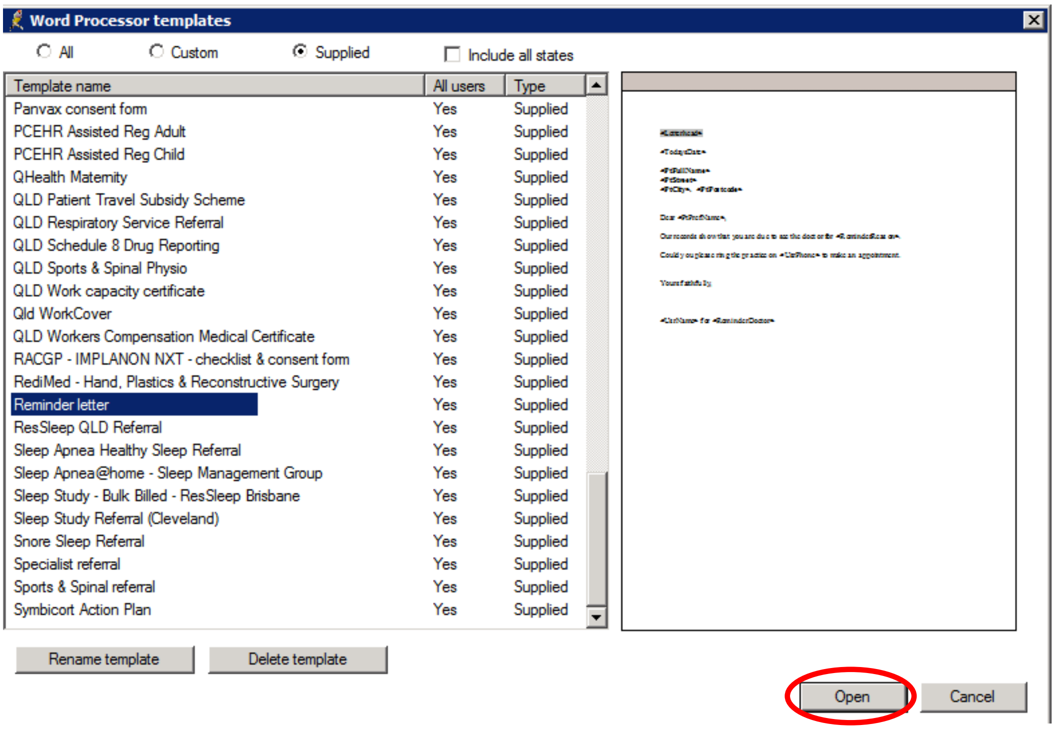
- **Reinventing the wheel**
  Before starting to create your new template, do a Google search to see if someone else has already created one and made it available. Many PHNs have websites which have comprehensive lists of templates. If there isn't one formatted for Best Practice, you could use the Medical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

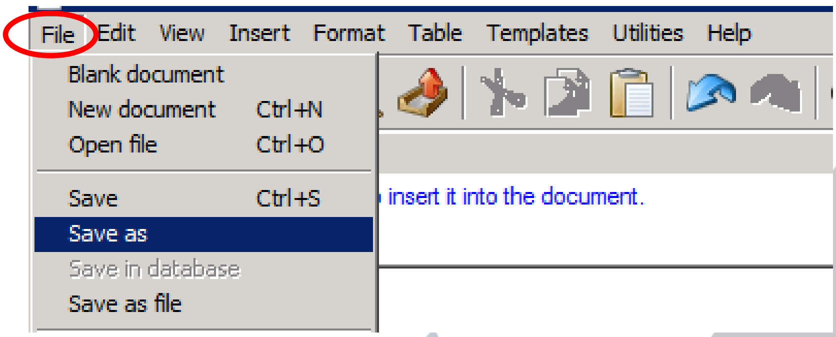


2. Select the template you wish to modify from those available and click the **Open** button to confirm your selection.



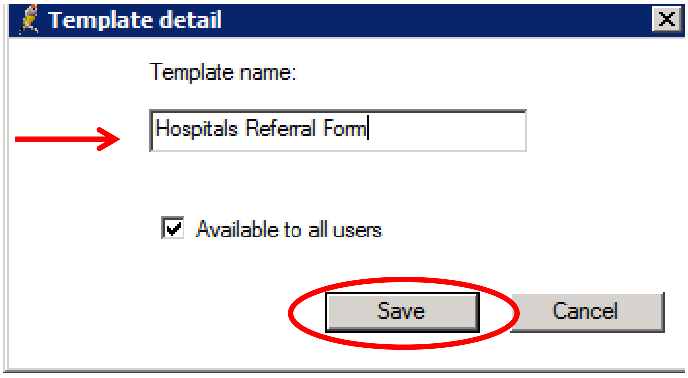
3. Make modifications to the template as necessary. You can change the required text to suit your requirements, add new template fields or replace existing template fields as required using the tree to the left-hand side of the screen.

4. Select **File** and click on **Save as** to save the template.



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.



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].