Installing a Template in Best Practice

Note: Right-click to save the .rtf file to your computer.
Click on the Link to the Template and download the document. Right click on the downloaded document, select **show in folder** right click and copy & paste document to your desktop ready to import.
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 on your desktop

Select the Template document > **Select Open**

Select **Save** icon

Name the Template **Sleep WA Dr J Philpott Referral** and tick **Available to all users**

Click > **Save (Click Add button to Add to Favourites List)**

Creating a Contact for Sleep WA Dr J Philpott

Go to > **View** select > **Contacts**

Select **Company/Institution**

Name: Sleep WA Dr J Philpott

Address: Nedlands   **Post Code:** 6009.

Messaging Provider: Select Healthlink   **Account ID:** drphilpo   Select > **Save**

Using the Template and Sending Referral Electronically

Go to patient file > Select a patient

Select the **New letter** icon

Go to the **Templates** tab

Scroll to **Use template** > Select template **Sleep WA Dr J Philpott Referral** > **Open**

Follow referral selection prompts

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

To send electronically > select HL7 icon

Select recipient from address book **Sleep WA Dr J Philpott** and Select **OK**