

### Installing a Template in Practix

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

Open Practix > select > **Admin**

Go to **System Configuration > Templates > Registered Document Templates**

Select > **letter / document** Template

Go to > **Create New > Import**

Click > **Select** > and Select the template **Sleep WA Dr J Philpott** (saved to desktop)

Click > **Open** > Rename template **Sleep WA Dr J Philpott Referral**

(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' **Sleep WA Dr J Philpott Referral**

Select > **Contact** for referral > select **Create 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)