Installing templates in Best Practice
Quick reference sheet

> **WARNING**
>
> Do **not open / modify / edit** templates in Microsoft Word, as it will corrupt the template tags.
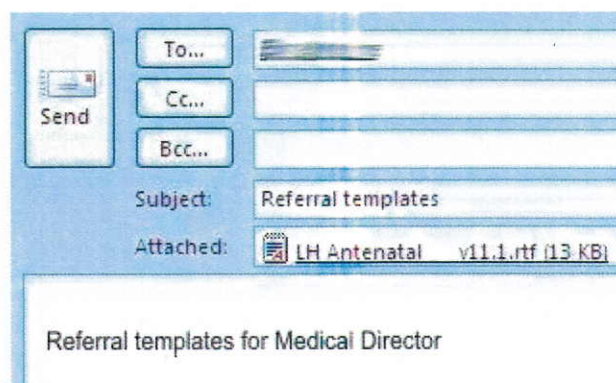>
> *Best Practice templates can only be modified in Best Practice*

Saving templates

For templates received as an email attachment
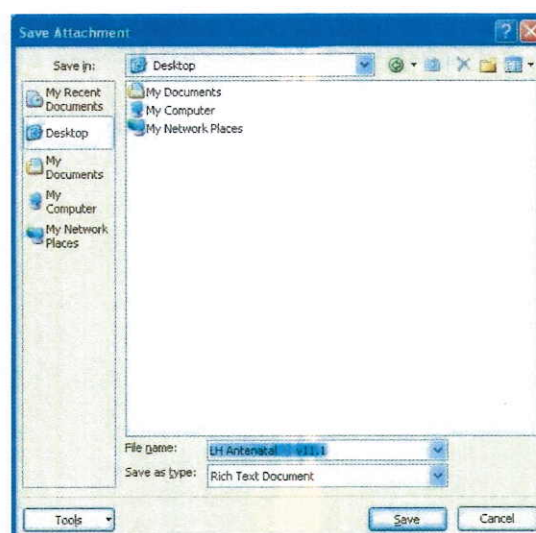Open email -- Right click on Attached file and select Save as.

Navigate to your computer desktop. Then click Save.

Referral templates for Medical Director

OR

For templates downloaded from the Internet
Click on Download on the website you are on and save on your computer desktop as above.
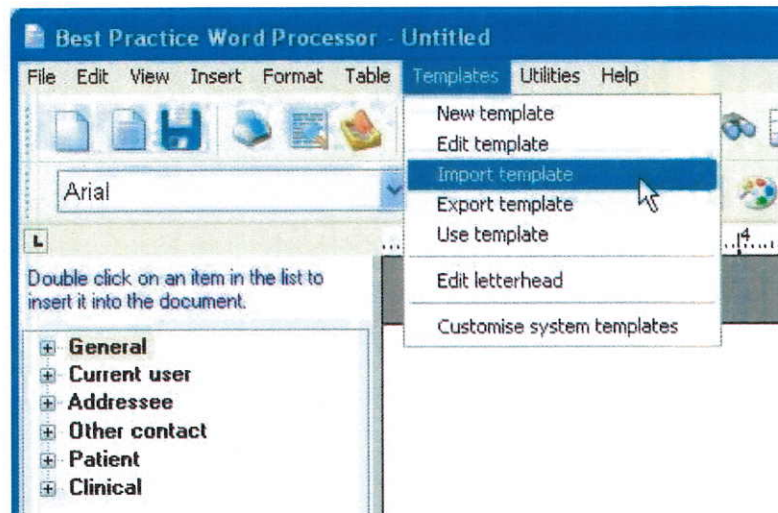
Installing templates

In Best Practice main screen, open Word Processor by clicking on this icon.

In the Word Processor, go to Templates - Import Template

Navigate to template's location (desktop) in the same manner as for Saving on previous page. Select the template you wish to import and then click Open. The template will appear in the word processor.

Saving the template: Go to File -- Save As

Name the file following your practice naming protocol. Check Available to all users.
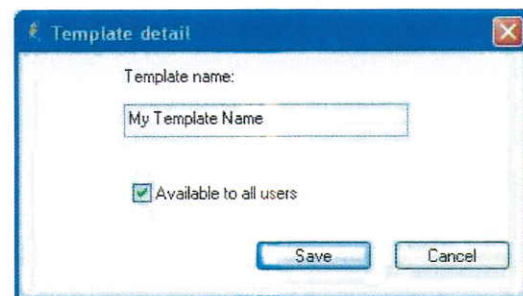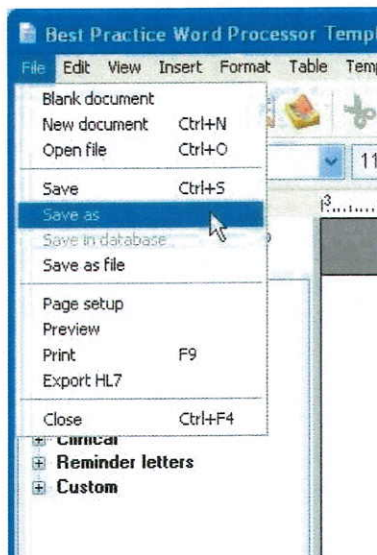
Click on Save.

Test the template to make sure it is working as expected.

Congratulations! You have successfully installed a template in Best Practice.