

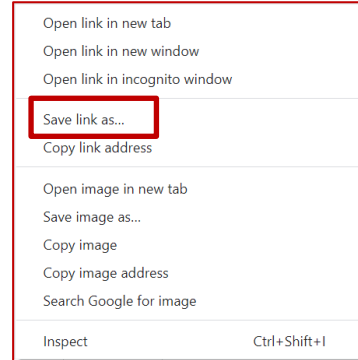
Summary Sheet

Importing templates

Follow these instructions when importing a template from another source eg a referral or health assessment template:

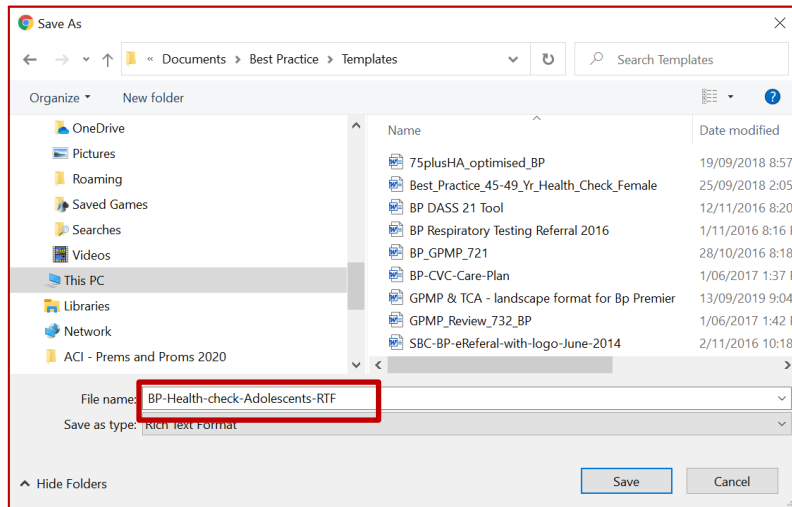
1. Right Click on the template and select **'Save link as'** or **'Save target as'**.

Note: The template must be in rich text format (.RTF) or word format – not pdf.



2. Name the file and **Save** it to a drive / folder on your computer/desktop.

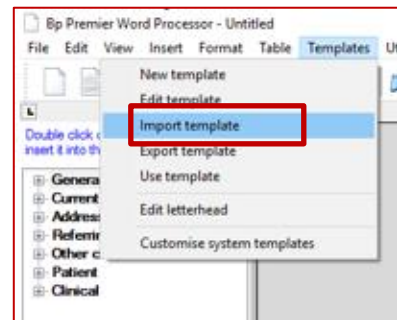
Important: Do not then double-click on this file from your computer as this will open it in Word and corrupt the fields.



3. **Open BP Premier** and open the Word Processor - **F4** or blank page icon.

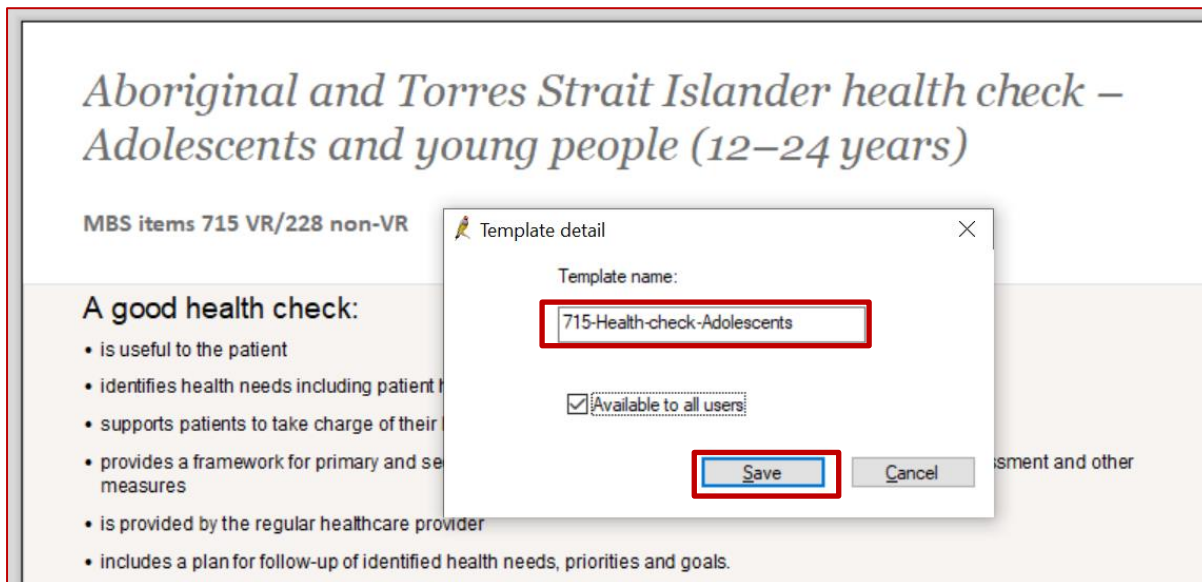


4. Select **Template > Import Template** and navigate to where you saved the imported template eg. desktop.



5. **Modify your template** (if necessary).

5. Select **File>Save as** and name your template, ticking 'Available to all users' if you would like to share with others within the practice. **Save.**



6. Your template will then be accessible in the **Template > Use Template (Custom list)**.

