GUIDELINES FOR IMPORTING REFERRAL TEMPLATES INTO BEST PRACTICE

Delivering a **Healthy WA**

BEST PRACTICE

Installing the templates

1. Go to the **CRS** website
   (http://www.gp.health.wa.gov.au/CPAC/referral/templates.cfm)
   a. Click *CRS Adult Referral v1-1*
   b. Select *Save As*
      i. Save to the desktop
   c. Select *Open folder* from the yellow prompt at the bottom of the screen

The BPS_CRS Template.rtf download has completed.   🚫 Open ▾   **Open folder**   View downloads   ✕

   NB: Do not select *OPEN* this will corrupt the merge fields for this template

2. Open **Best Practice**
3. Open the *Word Processor*
4. Select *Templates*; Select *Import*; Select *CRS_Adult(BPS)_v1-1.rtf* from the
   save location (the desktop)
5. Check Page settings
   a. *A4* Size
   b. All Margins are *10mm*

   Template detail
   Template name:
   CRS Template
   ☑ Available to all users
   [Save]   [Cancel]

6. Select *Save* Icon
   a. Enter the *Template Name*
      CRS Adult Referral
   b. Select the *Available to all users* tickbox
   c. Click *Save*
7. Repeat steps **1-6** for **CRS Obstetric & Gynaecology Referral** & **CRS Paediatric Referral**
8. Setup *Favourites List* (to be completed for each User)
   a. Click the *Add Button* below the *favourites* (bottom left-hand of screen)
   b. Select the **CRS Adult Referral** from the custom list; Select *Add*
   c. The *CRS template* has been added to this users favourites
9. Repeat step 8 for each user and each template to be added to the favourites list

   Template favourites:

Template name
CRS Referral
CVS Referral
EPC Referral
Specialist referral
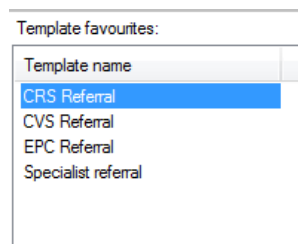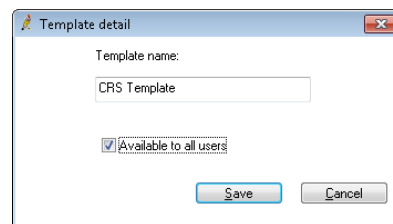
   (NB: you will need to login as each user to setup the Favourites list ONLY)

Creating the Contact for CRS

1. Select *View*; Select *Contacts*
2. Click *Add New*
3. Enter the following details into the **Contacts record**
   a. Select *Company/Institution*
   b. Enter *Name*:   **Central Referral Service**
   c. Select *Category*:   **Government Department**
   d. Add *Address*:

   i. *Suburb*:   **Perth**
   ii. *Postcode*:   **6000**
   iii. Click *accepts CDA e referrals* (circled in red)
   iv. Click *Save* (circled in orange)

   e. Select *Messaging Provider*:   **Healthlink** (circled in red)
   f. Enter *Account ID*:   **crefserv** (circled in orange)
   g. Click *Save* (circled in green)