

Instruction for Importing Oral Surgery Referral Form into Carestream R4 (Feb 2018)

These instructions are for users for Carestream R4 Software Users only.

Associated with this sheet, should be the Wessex Area Minor Oral Surgery Referral Form for R4 Users in .doc format.

These instructions will talk you through how to import this .doc file into the R4 list of letter templates. It will not interfere with any existing templates you already have, but will add it to the list.

This particular version of the Referral Form has Letter Merge Fields already placed in it. This means that template should automatically pre-populate itself with the patient's details.

Overview

In R4 there is no slick way of importing the oral surgery referral form into its list of letter template. It only allows you to create template within the software.

However, once you have created a template within R4, you can delete the content of that template, and the copy and paste from another MSWord document, straight into that template.

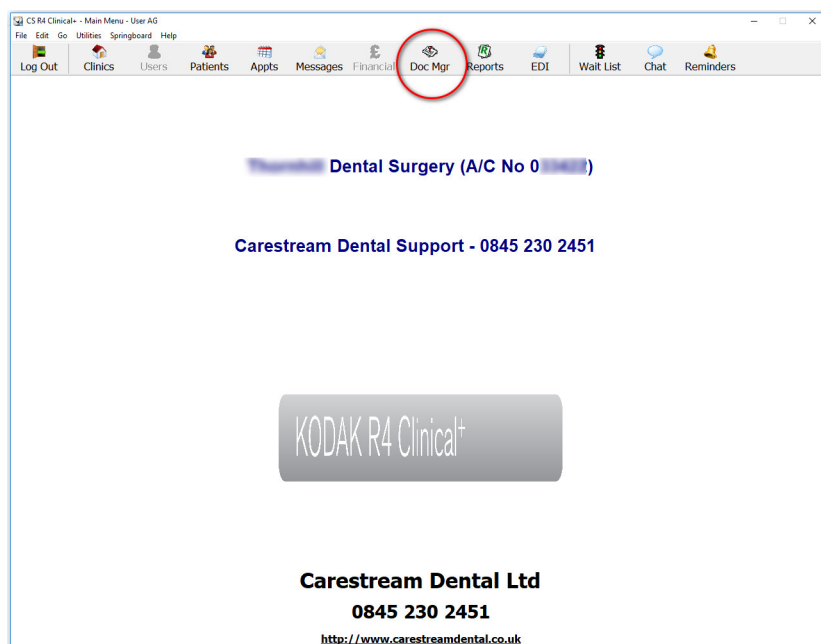
The downside of doing this are:

- Headers and Footers are not copied across.
- Margin sizes from the source document are not carried across to the target document. This has to be adjusted manually. Otherwise, you will find that a 2 page letter template spills over to 3 pages.

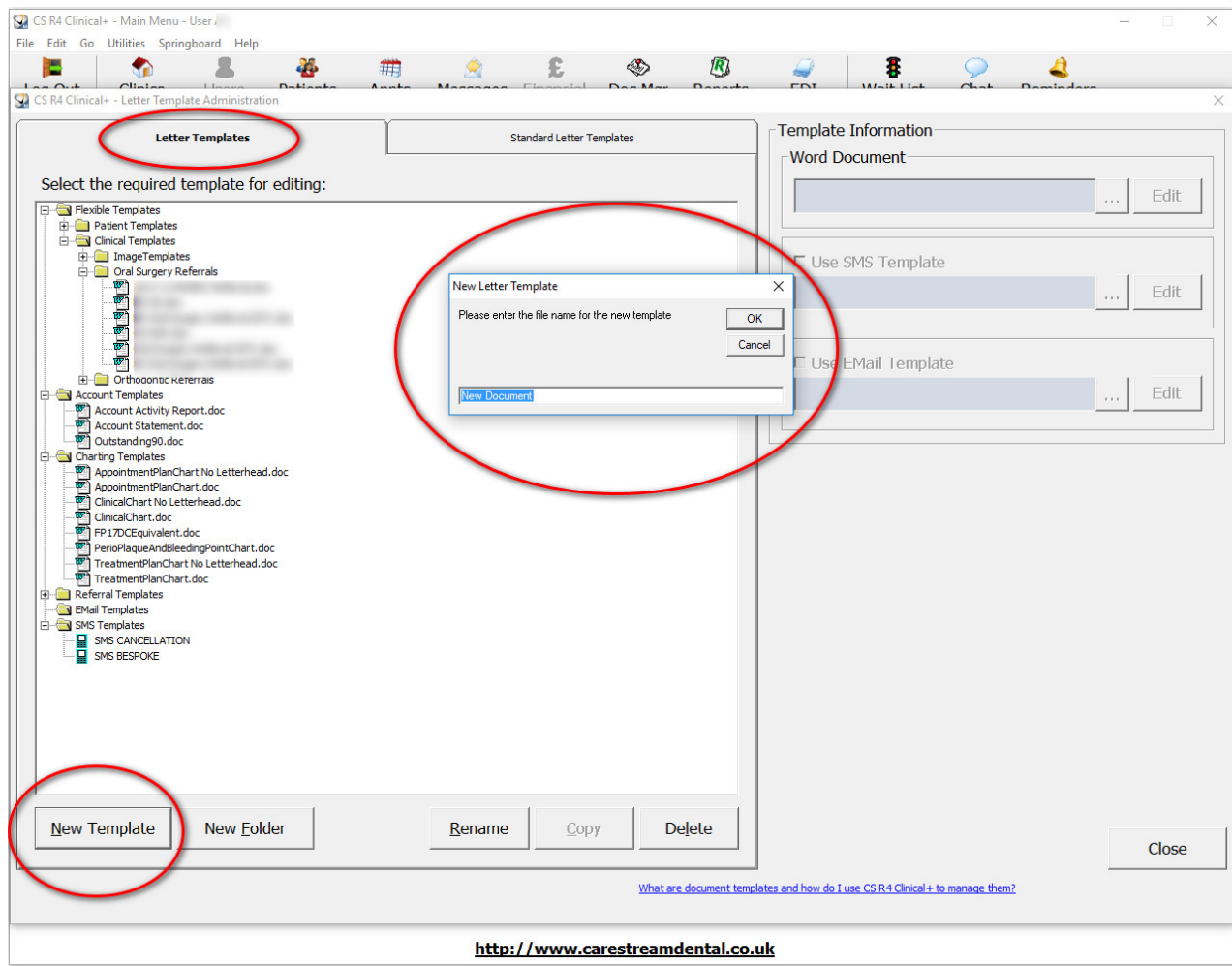
This guide will talk you through the procedure. It's not as complicated as it first looks.

Instructions to Insert Template

- 1) Firstly take the Oral Surgery Referral Form provided and place it somewhere you will be able to find it later on. It could be on the desktop, or you documents folder, or on a USB stick etc. Just remember where you put it.
- 2) Open R4 as you would normally do and then and then click on the Doc Mgr button.



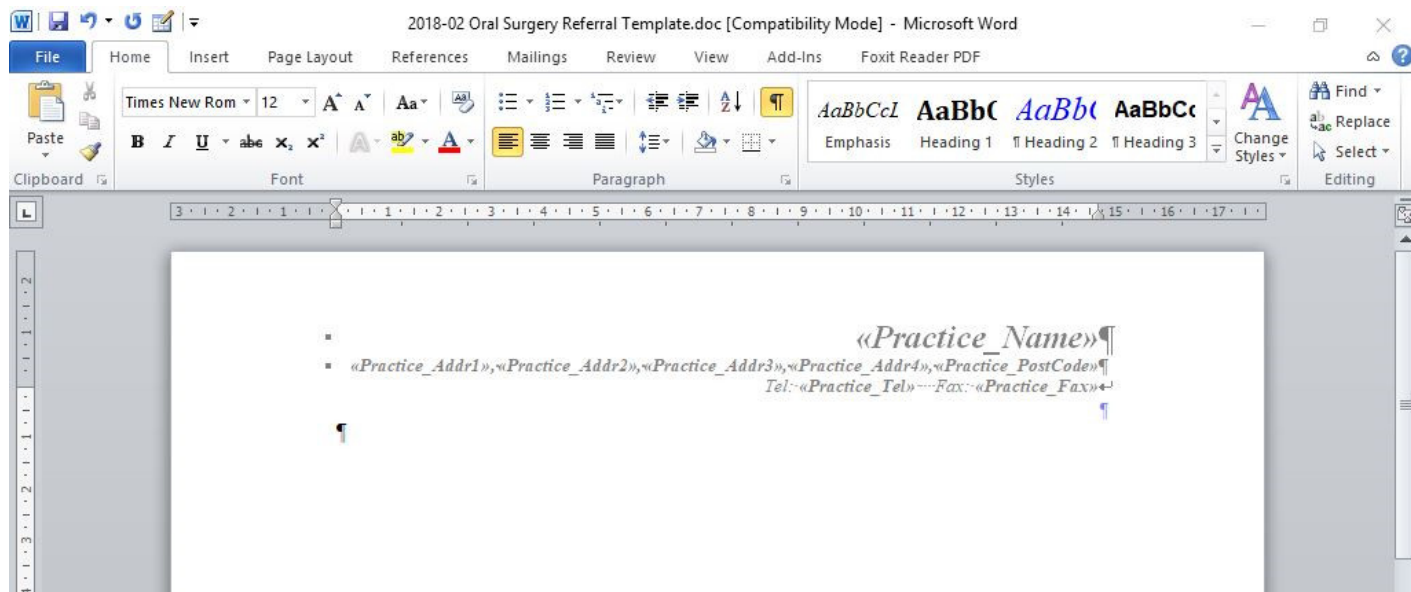
- 3) In Doc Manager, in the “Letter Templates” Tab, click on the “New Template” button on the bottom left. This will open a “New Letter Template” dialogue box. The location of the new template will depend on which folder was highlighted when you clicked the “New Template” button.



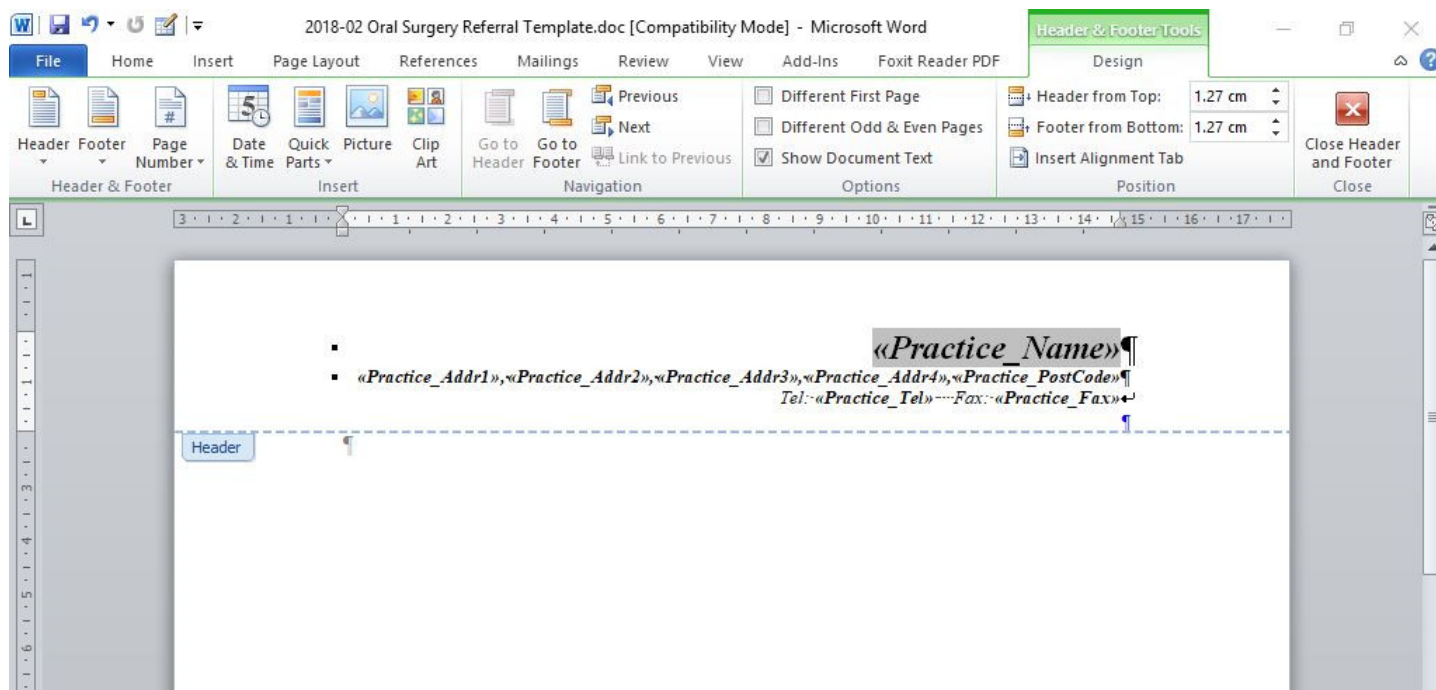
- 4) Give the New Letter Template a meaning full name. In the screen shot below I have used “2018-02 Oral Surgery Referral Template”. It doesn’t matter, as long as you can find it easily when you want to use it. Then click “OK”.



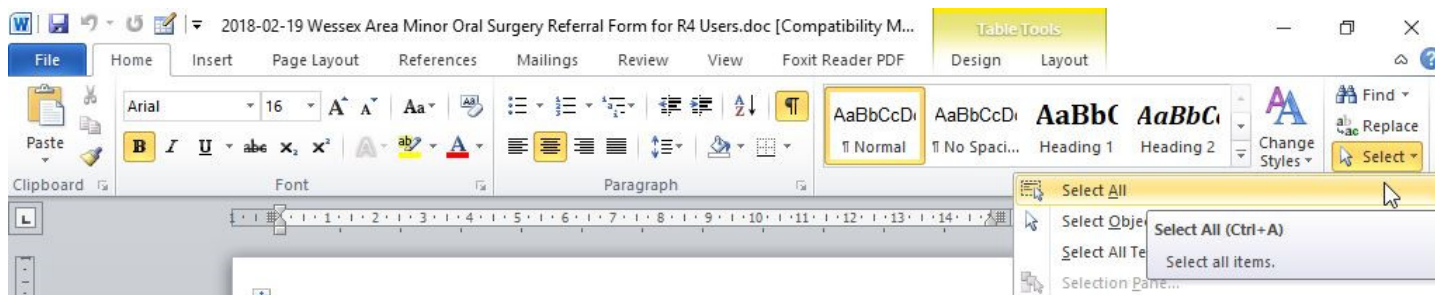
- 5) This will now create a standard default letter template, and open it in MSWord ready for you to edit it. You will notice in the screen below, that this template has a built in header, which contains field codes for your dental practice name and address. (We will aim to get delete this). You will also note that the characters are in grey. This is because it has been inserted as a 'Header' – part of the 'Headers and Footers' feature in MS Word.



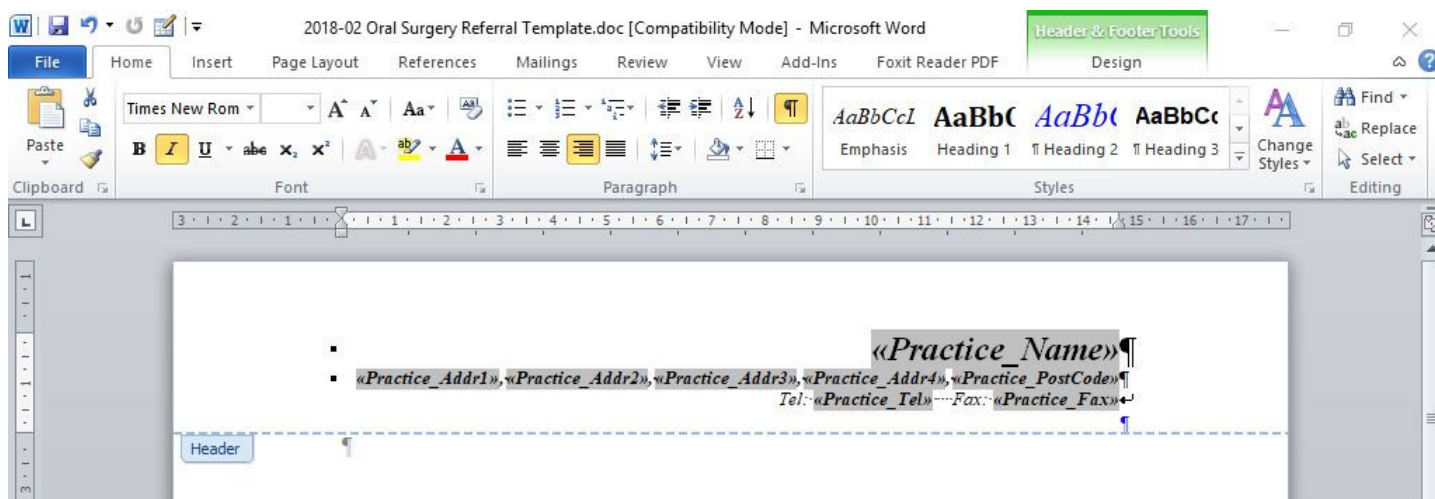
- 6) However, we don't want this, and want to delete this completely and copy and paste our own template. To do this we have to double-click on any of the grey characters on the header, to enter the Headers and Footer edit mode. Note how the ribbon toolbar has changed



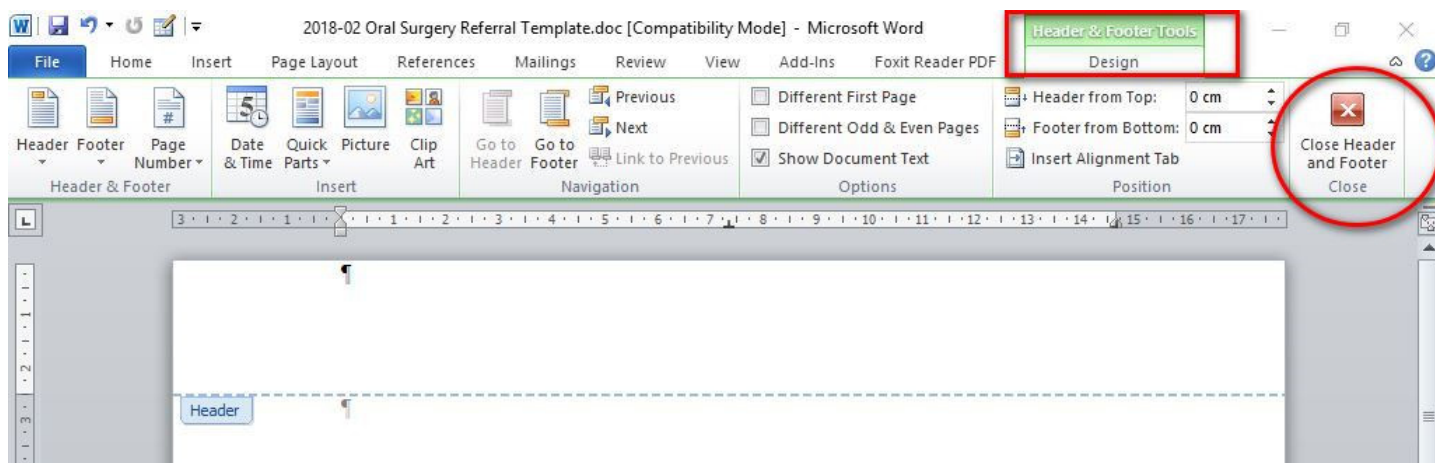
- 7) We now want to delete all the text in the header. We do this by selecting (highlighting) the whole document and deleting. The whole page can be selected by using keyboard shortcut <Ctrl>+<A> (keep pressed down the Control button on the keyboard – bottom left - and then click on the letter A). If you want to use a button on ribbon instead this can be found on the “Home” ribbon, on the right hand side



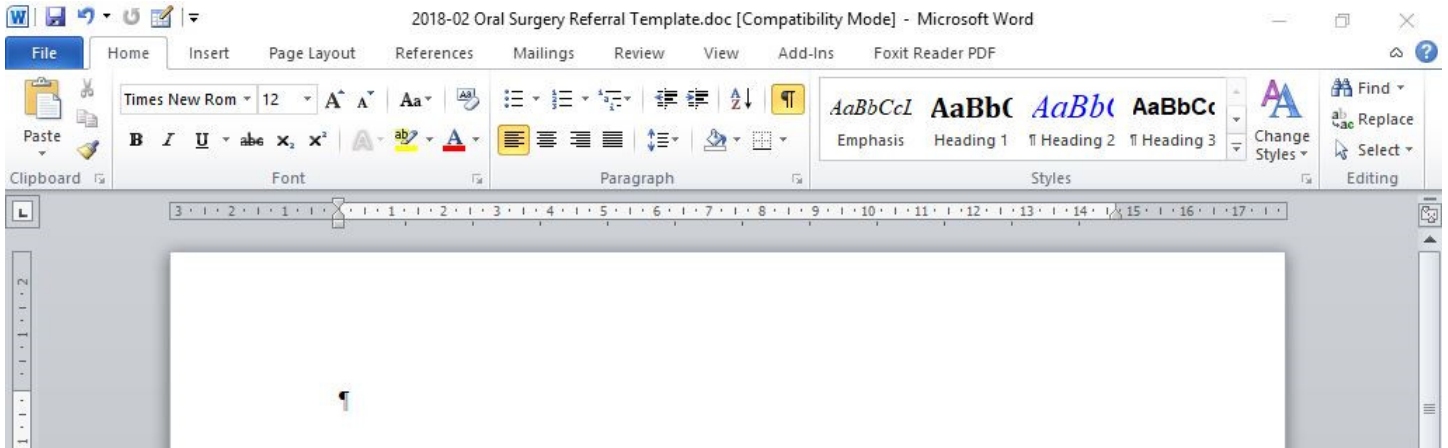
- 8) Check that all the characters (letters) are highlighted.



- 9) Now press the delete button on the keyboard to delete the highlighted text, which should then disappear. Then “Close Header and Footer” on the ‘Header and Footer Tools’ Ribbon. You should now have an empty page.

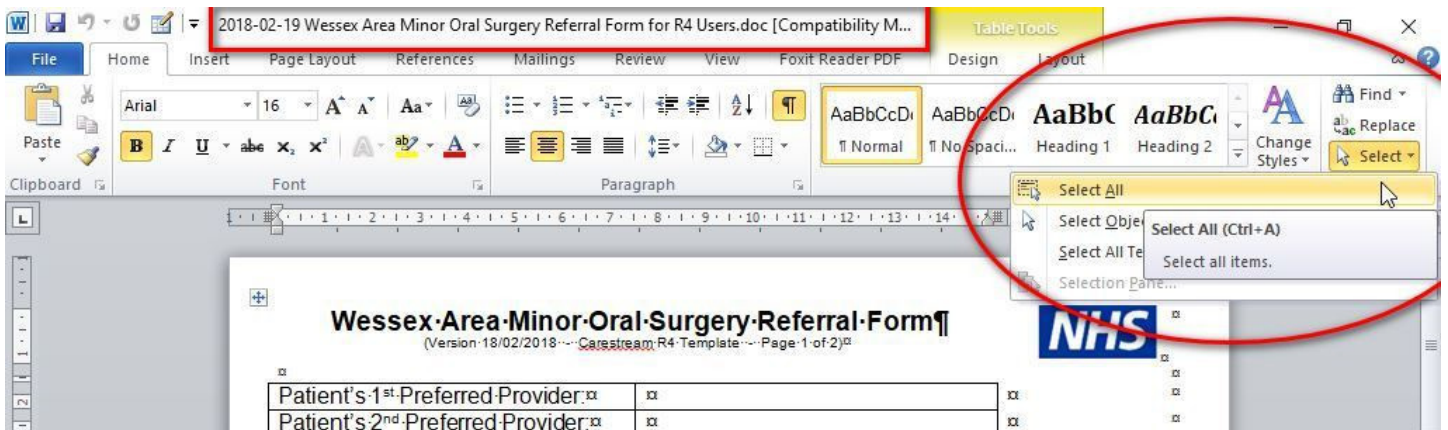


10) You should now have an empty page. And we are now ready to copy and paste our own template onto this blank page.

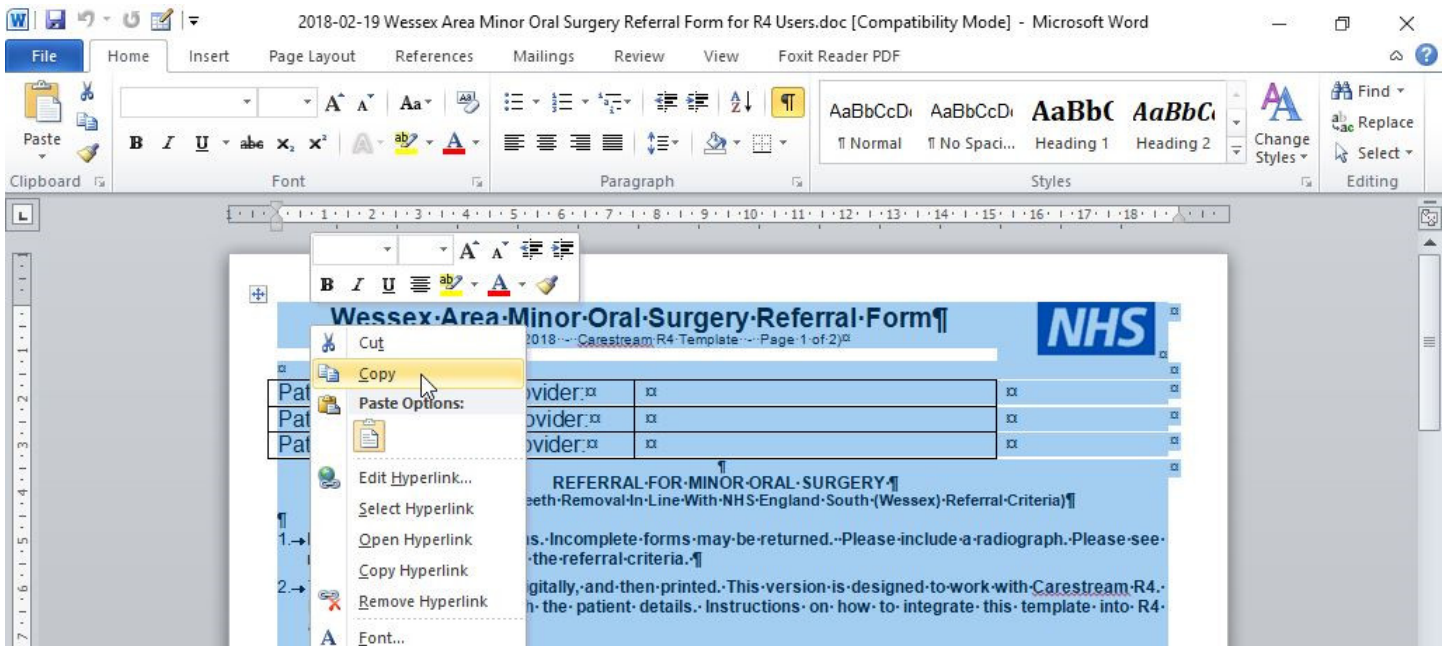


11) We now need to go back to our original premade template supplied with these instructions, as mentioned under instruction 1) above. Open it. Now highlight the whole document by using the Ctrl+A keyboard shortcut, or using the 'Select All' button on the Home Ribbon (See instruction 7 above if you need a reminder)

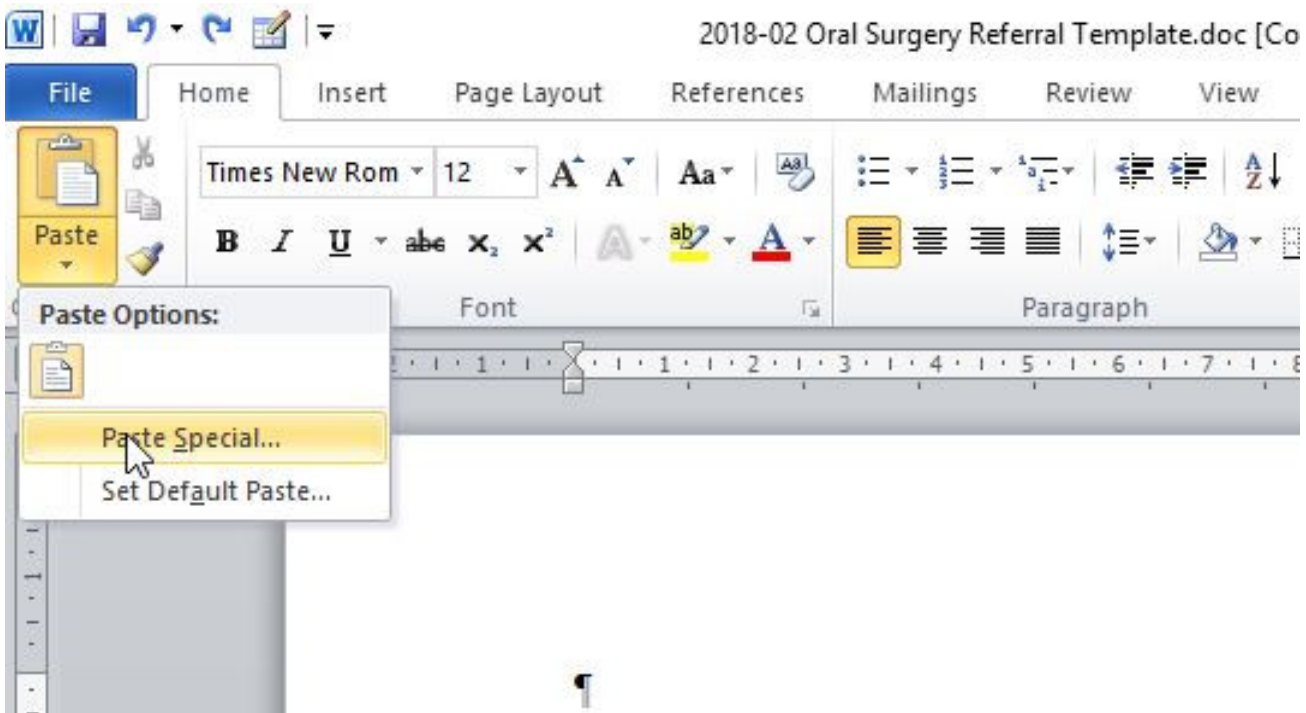
FROM THIS STAGE ONWARDS BE CAREFUL. WE WILL HAVE TWO WORD DOCUMENTS OPEN SIDE BY SIDE WHICH WILL LOOK SIMILAR. YOU CAN TELL WHICH ONE YOU ARE WORKING ON BY LOOKING AT THE TITLEBAR ABOVE THE MENUBAR, WHICH IN TURN IS ABOVE THE RIBBON.



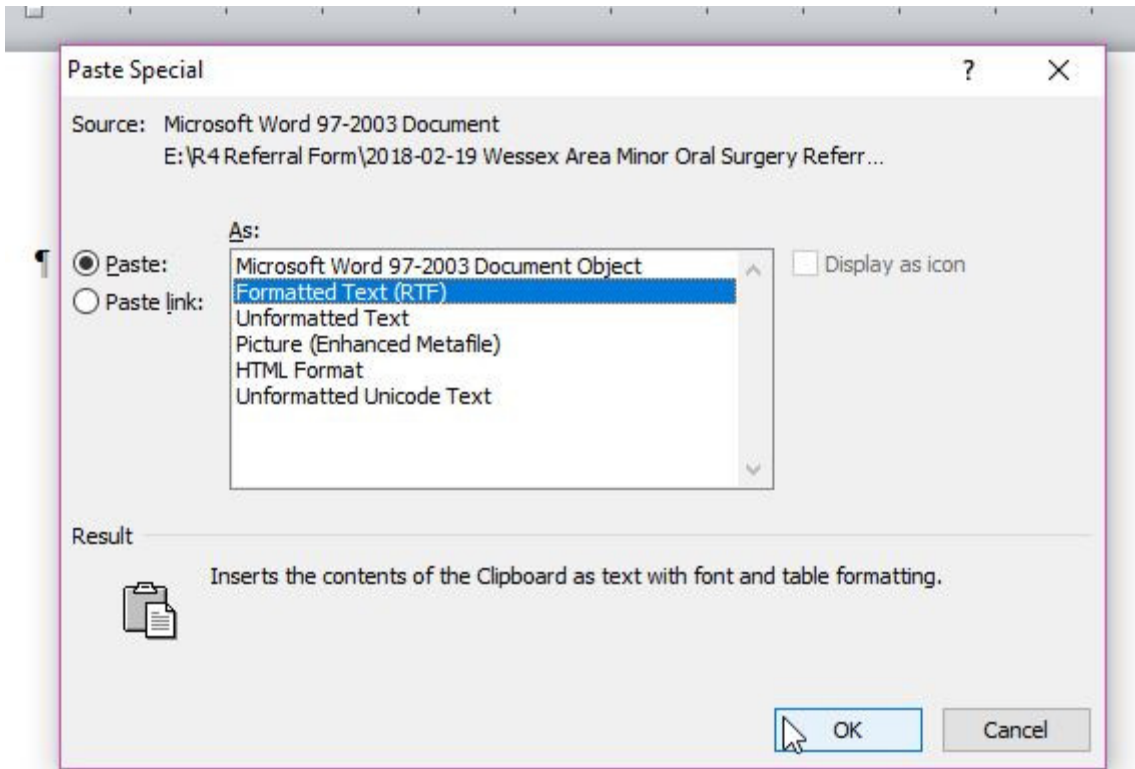
12) We are now ready to copy the whole document onto the clipboard. Check that the whole document is highlighted. Now RIGHT-click (not left) on any of the blue highlighted text, click 'Copy'.



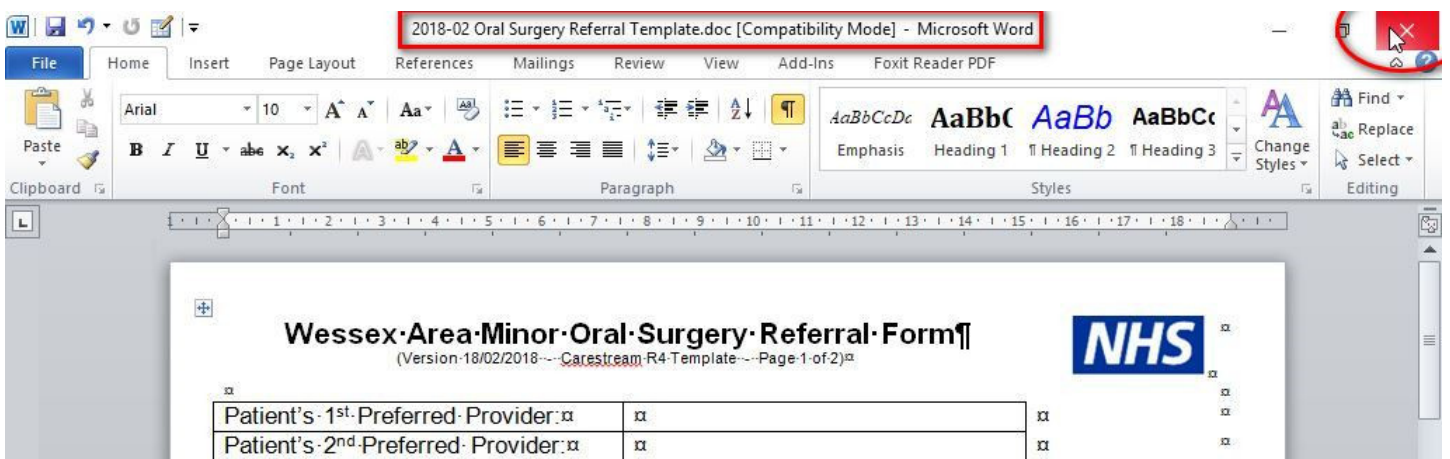
We now have the text onto clipboard. We are now ready to paste it into our R4 template Word document. At this stage **DO NOT USE 'PASTE'**. **YOU MUST USE 'PASTE SPECIAL'**. This can be found on the Home Ribbon, on the left, near the 'Past' button, by clicking on the down arrow triangle, below the button.



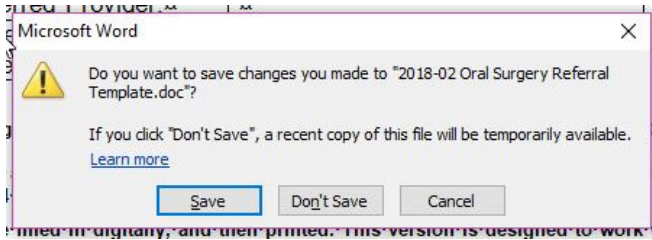
13) This will now open the Paste Special dialogue box, and we now need to select 'Paste' radio-button (not PasteLink), and select 'Formatted Text(RTF)' from the list. And then click OK.



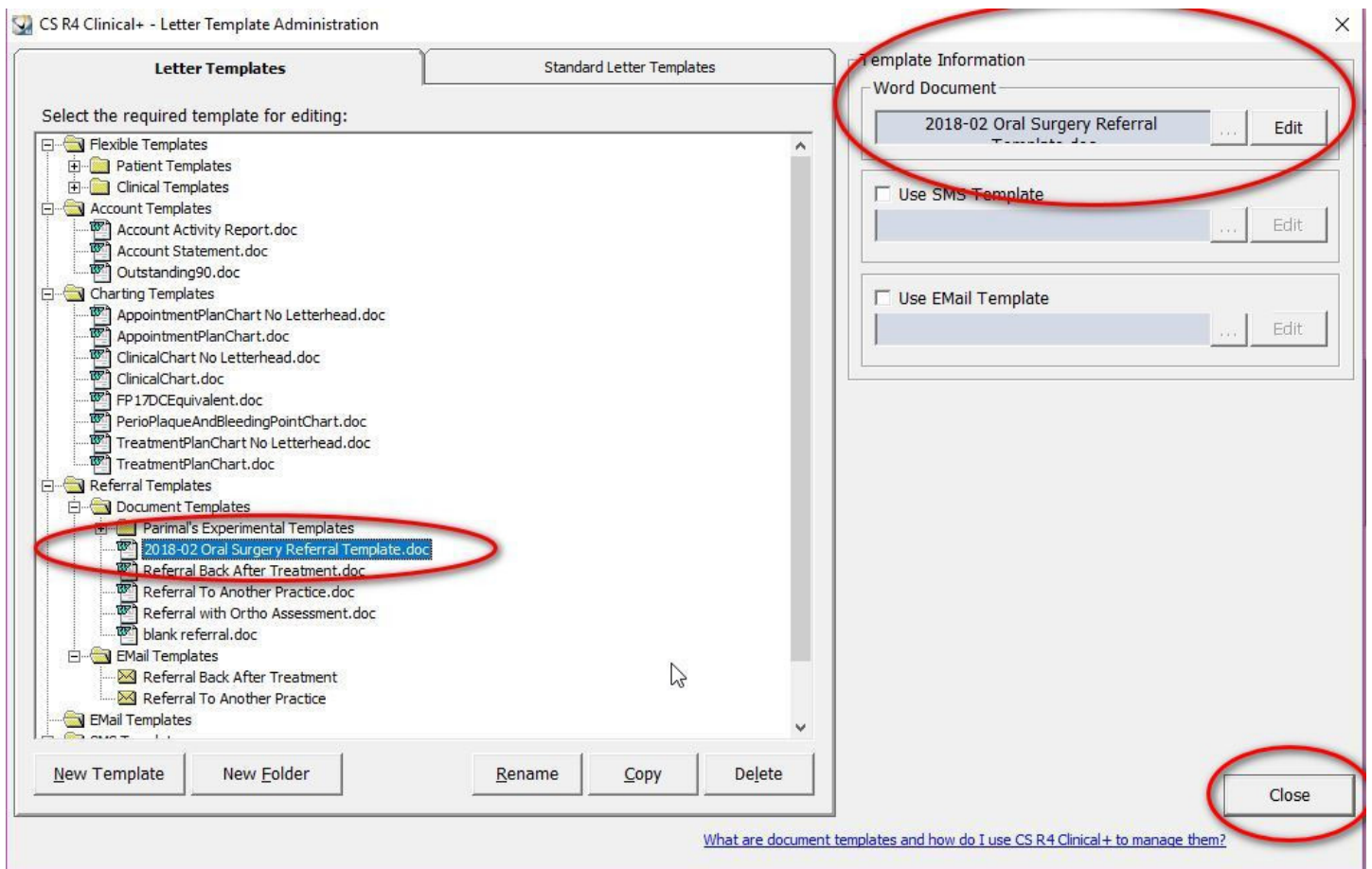
We have now pasted into the R4 template. We are now ready to close MSWord, and return back to the list on templates in R4. Close Word by clicking on the "X" on the top right hand corner. Please be aware that we now have two extremely similar documents, both open in Word. One of which we want to save changes, the other one not. The only way of telling which document is open is to look at the Titlebar in Word.



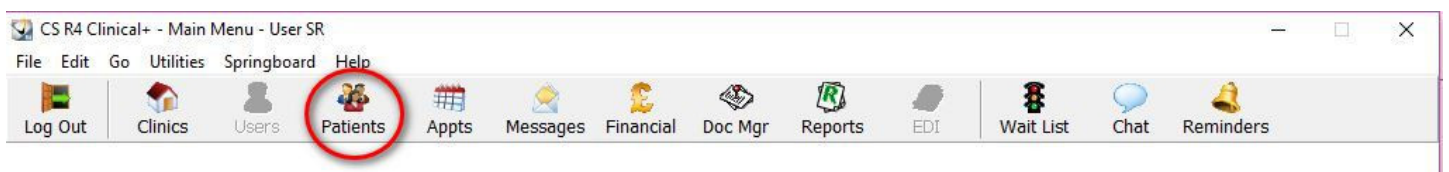
14) Closing this target Word document will prompt a Save dialogue box, and YES, we DO want to save.

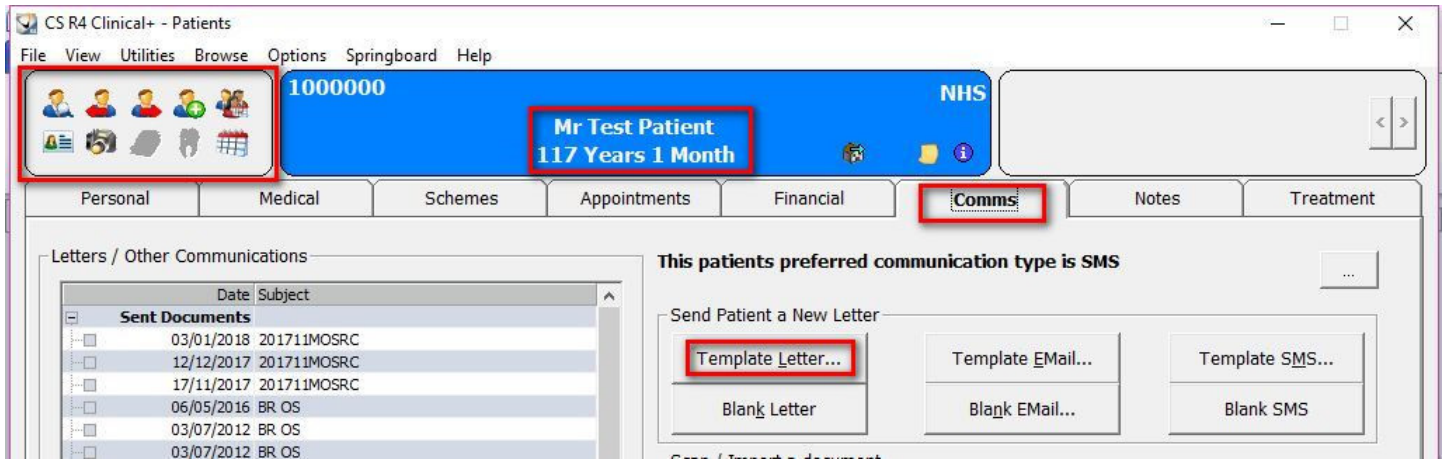


15) We should be now be back to the R4 interface. If you wish to make any further changes to the template, you can use the edit button, after highlighting the relevant template on the left. Click 'Close' to leave the Letter Template Administration dialogue.

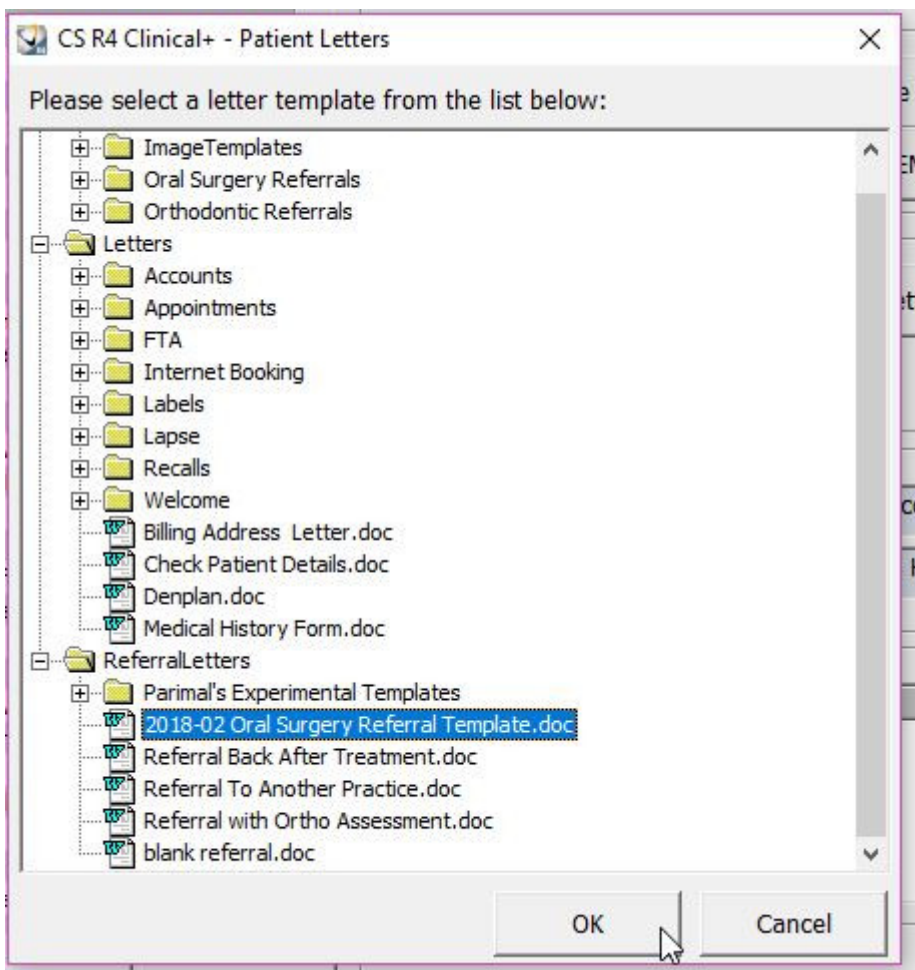


We are now ready to test our new template on a live patient record. Click on 'Patients'. Then use the search facility, and choose a patient.





16)Then select the relevant template.



17) If there are any active referrals present, R4 may ask to which previous referral the new referral pertains to. Click OK.

CS R4 Clinical+ - Select Referral

You have chosen to create a referral document for a patient with more than one current referral. Please select the referral this letter relates to from the list

Contact Name	Referral Date	Direction
oral surgery	03 Jul 2012	OutBound
Mr. Duncan	08 Apr 2013	OutBound
Mr. Duncan	08 Apr 2013	OutBound
oral surgery	15 Oct 2015	OutBound

OK Cancel

18) You should now see a MSWord document, with the patient name, address, dob, etc already populated. The rest of the document can be completed prior to printing.

00000029.doc [Compatibility Mode] - Microsoft Word

Wessex-Area-Minor-Oral-Surgery-Referral-Form

(Version 16/03/2016 - Carestream R4 Template - Page 1 of 2)

Patient Details

Patient Name: [Text] DOB: 01/01/1901

Referral Details

Referral Name: [Text] Date: 21 February 2015

Medical History

Medical conditions: [List of conditions]

Current medication: [List of medications]

Reason for Referral

Please provide the following tooth (tick or cross in box):

Teeth	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
1																														
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19) Please note that closing Word and saving will save a copy of the letter into the patient's record. It will leave the original template untouched.

CS R4 Clinical+ - Patients

File View Utilities Browse Options Springboard Help

1000000 NHS

Mr Test Patient
117 Years 1 Month

Personal Medical Schemes Appointments Financial Comms Notes Treatment

Letters / Other Communications

Date	Subject
30/03/2012	Referral with Ortho Assessment
30/03/2012	blank referral
12/04/2012	Referral To Another Practice
13/04/2012	Referral to Mr
13/04/2012	Oral Surgery Referral
03/07/2012	BR OS
01/11/2017	Referral with Ortho Assessment
01/11/2017	2017-11-02 Oral Surgery Referral Form
08/04/2013	Orthodontic Referral
08/04/2013	BR OS
08/04/2013	Oral Surgery Referral ISTC
15/10/2015	BR Oral Surgery Referral ISTC
15/10/2015	BR OS
15/10/2015	BR OS
15/10/2015	OS SGH
15/11/2017	2017-11-14-OSRef-R4
21/02/2018	test
21/02/2018	test
21/02/2018	2018-02 Oral Surgery Referral Template

Received Letters
Signed Documents
Recare Communications
Other Communications

Add Note... Edit Details... Open Letter Revise Letter

This patients preferred communication type is SMS

Send Patient a New Letter

Template Letter... Template Email... Template SMS...
Blank Letter Blank Email... Blank SMS

Scan / Import a document

Scan... Scan Settings... Import...

Recall Information

Dental Status: Appt Booked, Notification communication no... Details...
Hygiene Status: Underivable - No Previous Hygiene Appt Found Recall Phoned

Cancellation Letters

Date	Letter
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Outstanding letters: 0

That concludes the instructions for instructions for adding the oral surgery template to R4.

Please contact me with any problems you encounter, or you have any constructive comments.

Many thanks

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