Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Import or Export Templates (Client Server)

Last Modified on 04/17/2020 10:14 am EDT

Version 14.19

> **Note**: The article applies to Client Server models of OP only. For exporting and importing from a Cloud environment, click **here**.

Export Templates

1. Navigate to **Clinical tab > Encounter Templates** or **Well Visit Templates** to open the template editor window.
2. Select the template to export (Ctrl + click each Template to select multiple Templates).
3. Click the **Export** button. A confirmation message is displayed.
4. Click the **Selected or All** in the confirmation window.
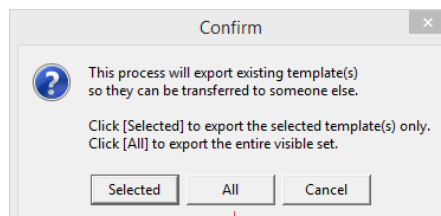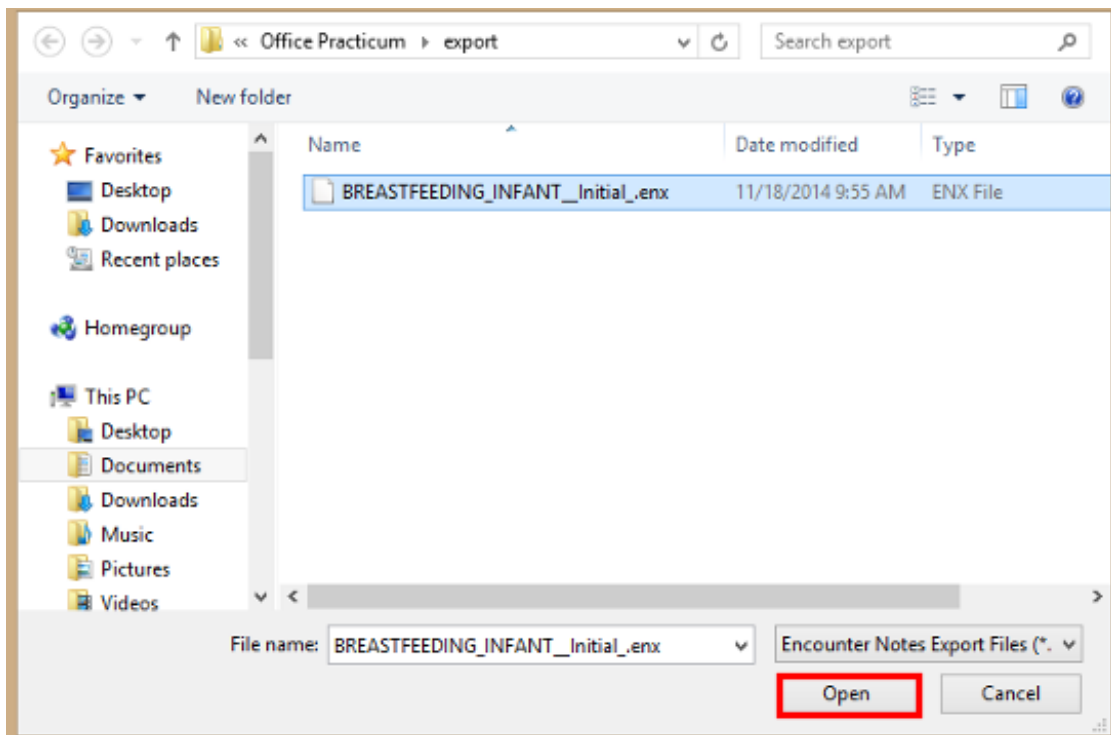

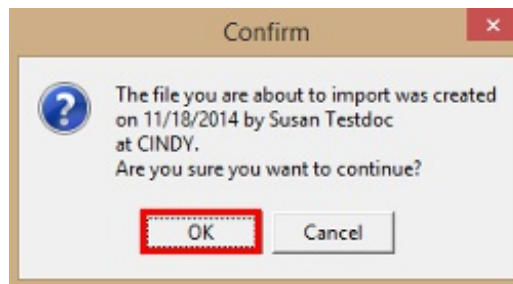
5. Save the file on your computer.
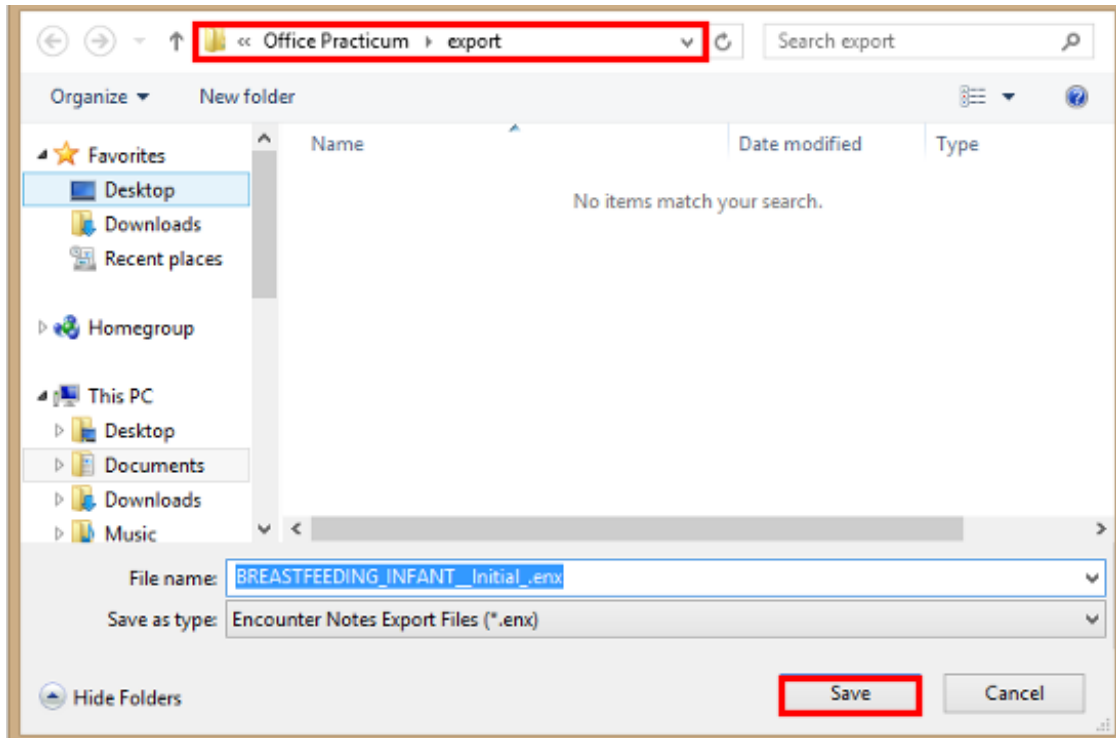
Import Templates

1. Navigate to **Clinical tab > Encounter Templates** or **Well Visit Templates** to open the template editor window.
2. Click the **Import** button.
3. Locate the files you saved on your computer, and click the **Open** button.

4. Click the **OK** button to confirm the file you are importing.

5. Click the **Insert** button to add the Template. If the Template exists in the database, you can click the **Replace** button to overwrite. If you do not want to perform the import, click the **Cancel** button.
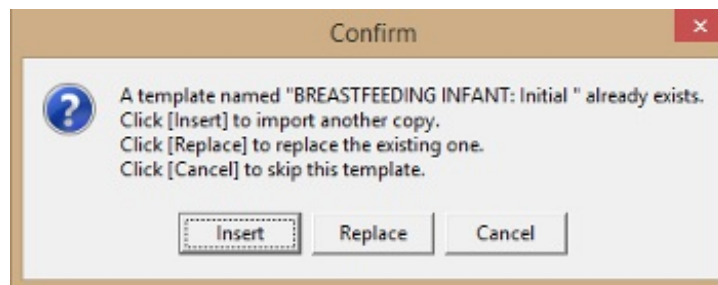
6. Click the **OK** button to confirm process is completed.
7. Locate and select the imported template in the template list.
8. Click the **Edit** button.
9. *(Diagnosis and Symptom Templates Only)* To the right of the Author field, click the **Clear** button to remove the defaulted Author ($FX).
10. *(If needed)* Customize the imported template. It is a Best Practice to review all imported templates to ensure they are set up to best meet the needs and workflows of your practice.

Version 14.10

> **Utilities > Manage Clinical Features > Encounter Template Editor**
> **Utilities > Manage Clinical Features > Well Visit Template Editor**

⚠ **Note**: The article applies to Client Server models of OP only. For exporting and importing from a cloud environment, click **here**.

Export Templates

1. Select *Manage Clinical Features.*
2. Select *Encounter Template Editor* or *Well Visit Template Editor.* The template list displays.
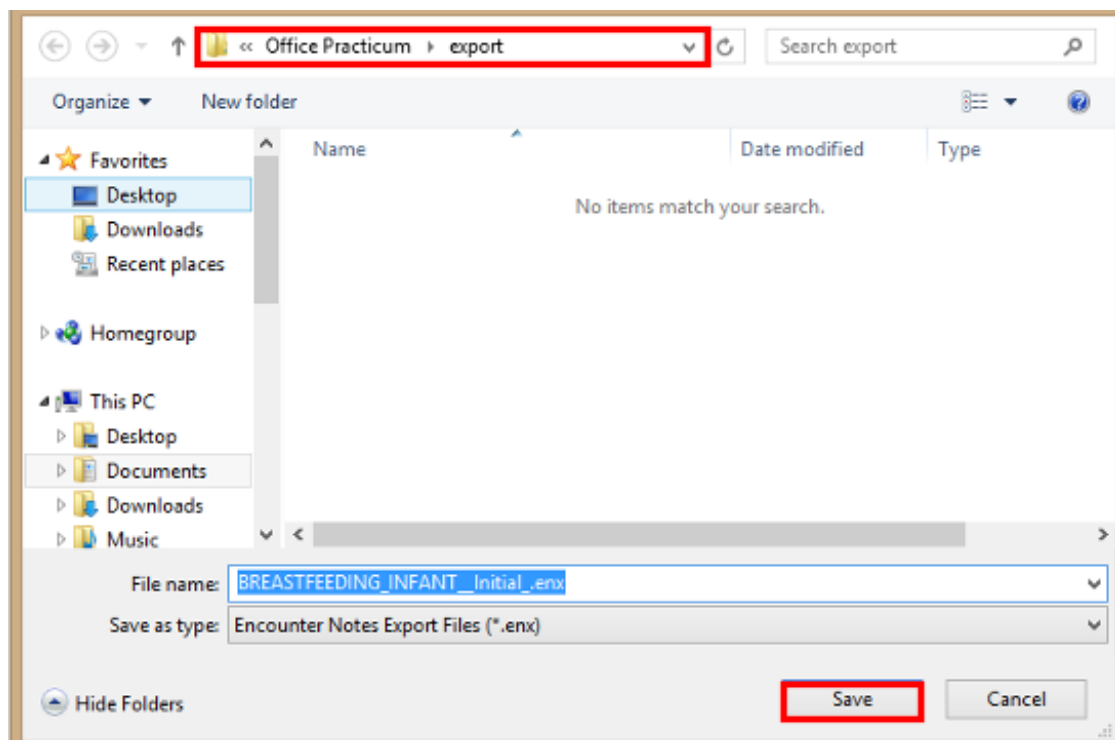3. Select the template to export.

4. Click the **Export** button 🔼 Export .
5. Click **Selected** to export the templates you highlighted.
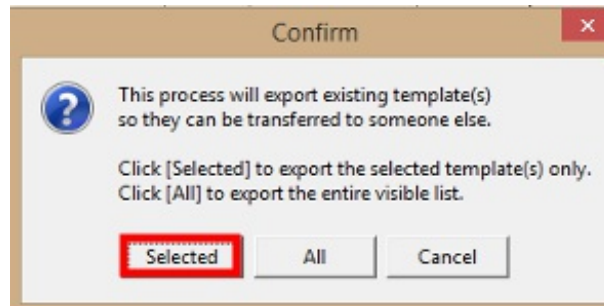
**Template Editor: Export Confirm**

6. Save the file on your computer.

Template Editor: Save File

ℹ️ You can email the files to another Office Practicum practice.

Import Templates

1. Select *Manage Clinical Features*.

2. Select *Encounter Template Editor* or *Well Visit Template Editor.* The template list displays.
3. Click the **Import** button.
4. Locate the files you saved on your computer and click**Open**.
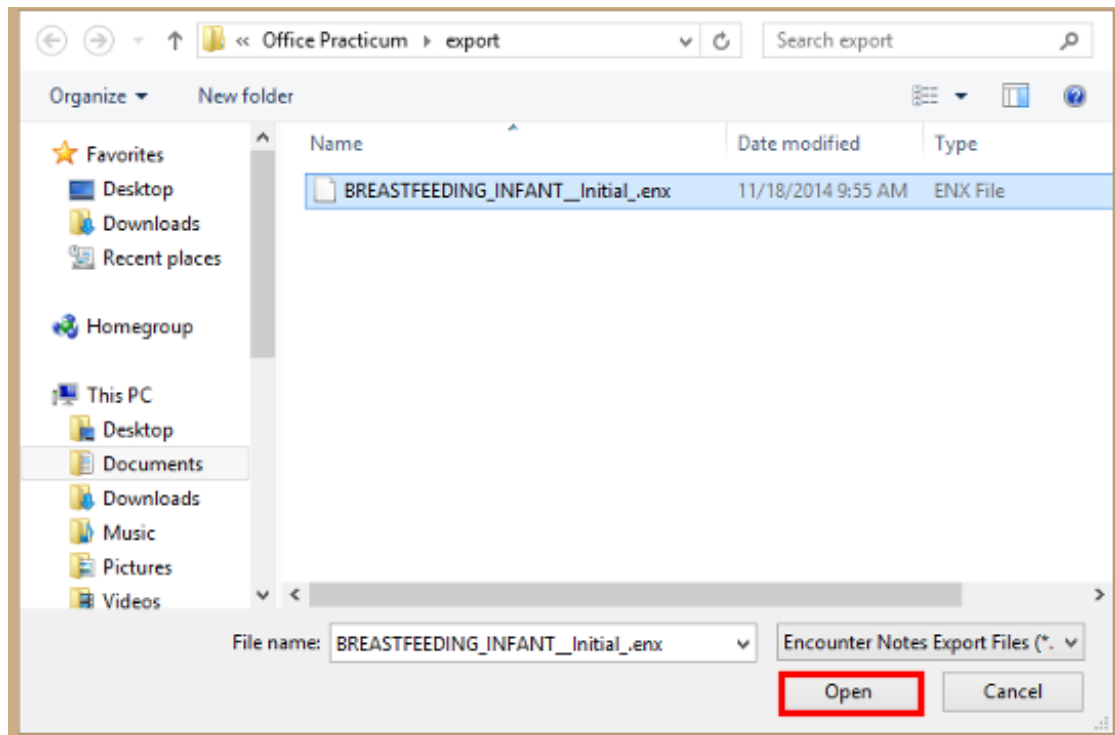
Import Files: Select Files

5. Click **OK** to confirm the file you are importing.
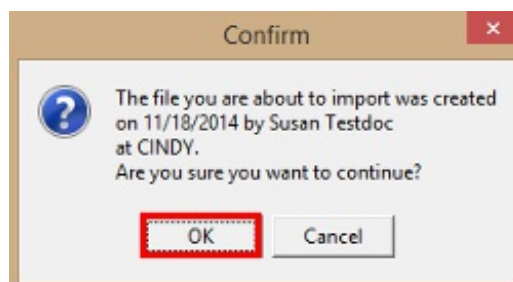
Import Template: Confirm File

6. Click Insert to add the template.

Import Template: Confirm Templates

> If the template exists in the database you can select **Replace** to overwrite. If you do not want to perform the import select **Cancel**.

7. Click the **OK** button to confirm process is completed.

> It is best practice to review all templates imported