

# Warnings: Before You Share Templates

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The template Export and Import functionality in OP allows you to use templates shared by other practices. However, OP strongly advises caution when importing templates so that you do not inadvertently overwrite your existing templates.

Because OP cannot guarantee that practice-created templates follow best practices, we do not advocate sharing templates created by other practices unless we have vetted them. If OP identifies templates that have value for numerous OP practices, and if those templates follow best practices, we make those templates available from the [Template Sharing Catalog](#).



**Warning:** While OP includes functionality that prevents the duplication of Encounter Questions when importing templates, if you are not careful when importing templates, you may inadvertently overwrite existing templates in your OP system. It may be very difficult to undo any changes to your base templates after importing revisions of those templates. For template-sharing warnings and procedures, refer to the information below.

**OP is not obligated to fix your templates or your data if you import or share templates and damage either your templates or data in the process.**

## Warnings for Importing and Sharing Templates

- Do not attempt to import or share templates unless you are running OP Version 14.6.12 or later. Using an earlier version may allow you to duplicate encounter questions and damage your existing templates. It is highly recommended to be operating in the most current OP version.
- Some templates may be set to ICD-9 and some may be set to ICD-10. Importing templates and not setting ICD-9 or ICD-10 as the preference may lead to OP displaying the error message, "Data Set Not in Edit/Insert Mode." When importing templates, be sure to select **ICD-10 Preferred**.
- When you import a template, OP displays a confirmation window that gives you the options: Replace, Insert, and Cancel. Selecting **Replace** overwrites your existing template with the template you are importing. Selecting **Insert** makes a copy of the template you are importing and preserves the original. Always select **Insert** (not Replace).
- Only import Encounter-related templates. Your Bright Futures Well Visit template provides all the information you need and you may overwrite or duplicate your existing Well Visit templates.
- Shared templates are customized for specific practice workflows. Be sure to customize each template you import so that it reflects the needs and workflows of your practice.

## Additional Information

For details and instructions on the Export and Import functionality in OP, refer to the article below that matches your OP environment (Client Server or Cloud):

- [Import or Export Templates \(Client Server\)](#)
- [Import or Export Templates \(Cloud\)](#)

For details on downloading templates from the Template Sharing Catalog and for a list of templates available for download, refer to the [Template Sharing Catalog](#).