

[YOUR CLINIC NAME]

Family Practice Toolkit Editing Guide

Instructions for setting up and editing the Family Practice Toolkit

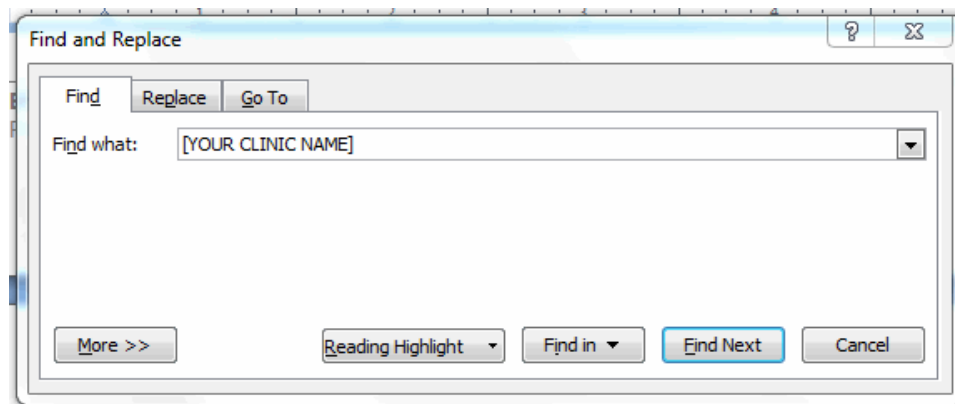
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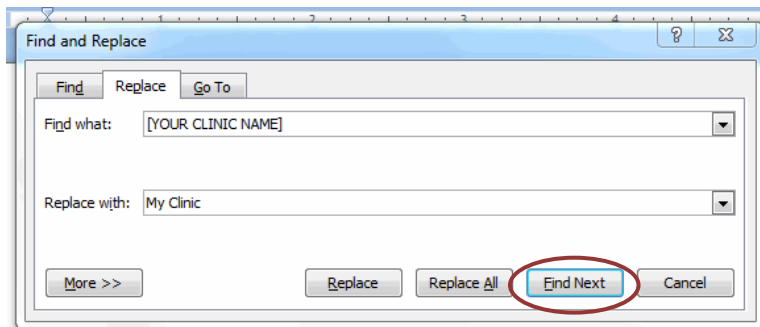
INSTRUCTIONS FOR SETTING UP YOUR FAMILY PRACTICE TOOLKIT TEMPLATE:

This Family Practice Toolkit template is a tool developed for family practice clinics in British Columbia. This template includes generic workflows and policies. Physicians or the assigned Toolkit Coordinator should review each section of this toolkit using the following steps:

1. To insert your full clinic name, click CTRL+F to find the following label: [YOUR CLINIC NAME] in this toolkit.



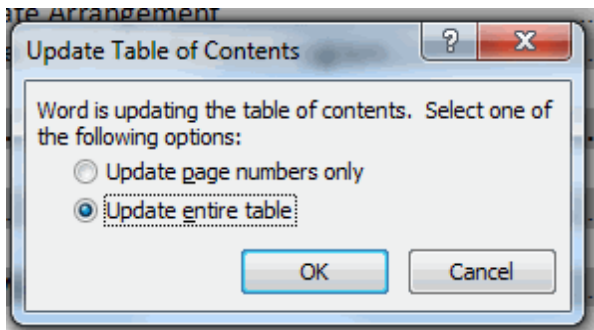
2. Click on the "Replace" tab and enter [YOUR CLINIC NAME] in the "Find what:" field and the name of **your** clinic in the "Replace with:" field.



3. Click on Replace All.
4. There are many section in this document where there are phrases such as [insert location] or [insert instructions]. This is done to make it easy to find sections that need to be modified. You may conduct a find and replace for an open square bracket "[" as noted above. This will find each spot where you need to modify text to make customize the Toolkit to be specific to your clinic. Some of the square brackets are associated with simple changes like modifying clinic hours, and some are associated with more complex changes such as developing an individual clinic privacy policy.
5. Once you have edited the Toolkit you will need to update the Table of Contents. Go to Table of Contents page and right click anywhere on the actual text of the Table of Contents. Select "Update Field" and the "Update entire table" option.

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6. Once you have found all the square brackets, and replaced with information pertaining to your clinic, you should read through the entire document ensuring that you agree with the general policies and procedures in this Toolkit. Every section may be modified to suit your clinic. We have included some general policies that you may use, but we do not recommend implementing use of this Toolkit until you have read through each section in detail and modified or signed off on each section.
7. Delete instructions (any text in teal font) and examples (any text in orange font).

INSTRUCTIONS FOR EDITING YOUR FAMILY PRACTICE TOOLKIT TEMPLATE:

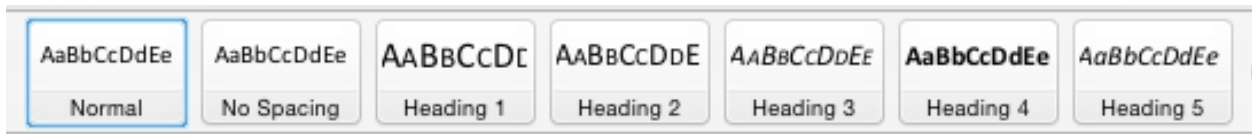
The Family Practice Toolkit was created with MS Word. Editing text in sections, which already exist, is straightforward – just edit the text as you normally would.


This guide is for the more complex procedures, such as adding new sections or chapters.

ADDING A SECTION TO THE TOOLKIT

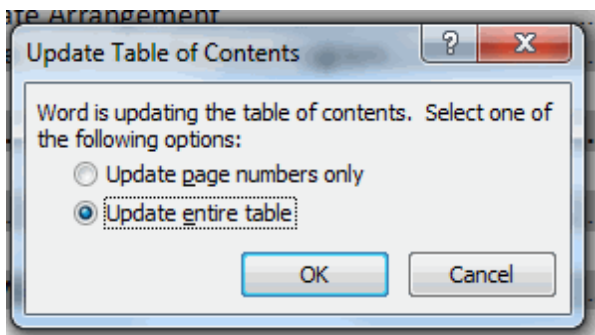
To add a section to the Toolkit, you first need to add a heading. To do this, first write down what your new section is to be called.

With the heading for your new section written, place the cursor on that line of text. On the “Home” tab of Word, there is a section titled “Styles”.



Click on the arrow in the bottom right corner of this section , and scroll down. If you are creating a new section, click on “Heading 2” in the list, and if you are creating a sub-section click on “Heading 3”.

Remember that you need to update the Table of Contents. To do this, scroll to the Table of Contents in your Toolkit. Right click anywhere on the text, and select “Update Field” in the menu that appears. Select “Update entire table” and click “OK”.

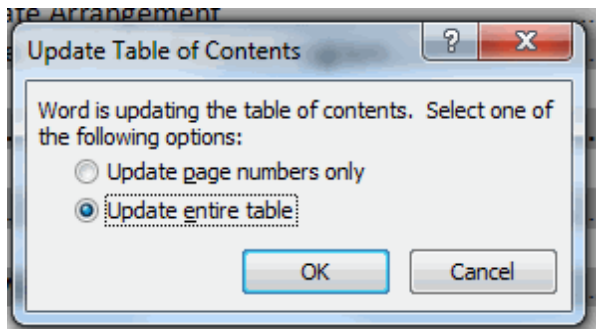


This will add your new section to the Table of Contents.

DELETING A SECTION FROM THE TOOLKIT

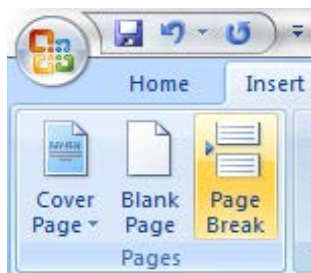
Deleting a section from the Toolkit is straightforward. You can highlight the text you wish to delete as you normally would, and then delete it.

Remember to update the Table of Contents. To do this, scroll to the Table of Contents in your Toolkit. Right click anywhere on the text, and select “Update Field” in the menu that appears. Select “Update entire table” in the pop-up window and click “OK”.

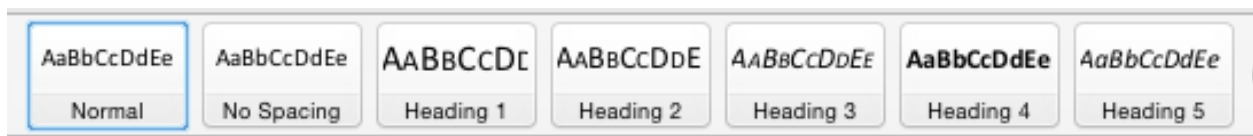



ADDING A CHAPTER TO THE TOOLKIT

To add a chapter to the Toolkit, insert a page break where you want your chapter to start.



Next, write the title of your Chapter. In order for the document to realize that you want this to be a new chapter, place the cursor on that line of text. On the “Home” tab of Word, there is a section titled “Styles”.



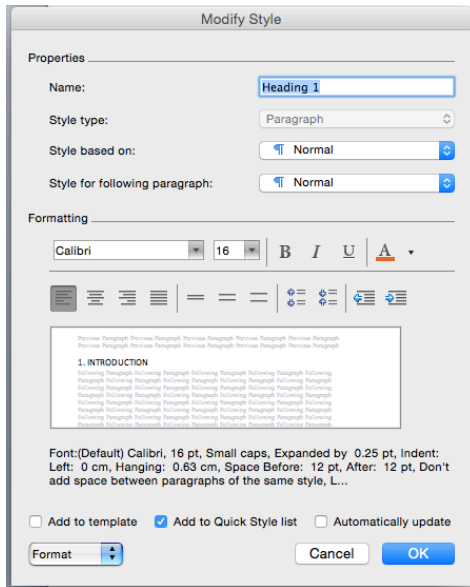
Click on the arrow in the bottom right corner of this section , and scroll down. Click on “Heading 1”.

Follow the [new section instructions](#) when you wish to add a section.

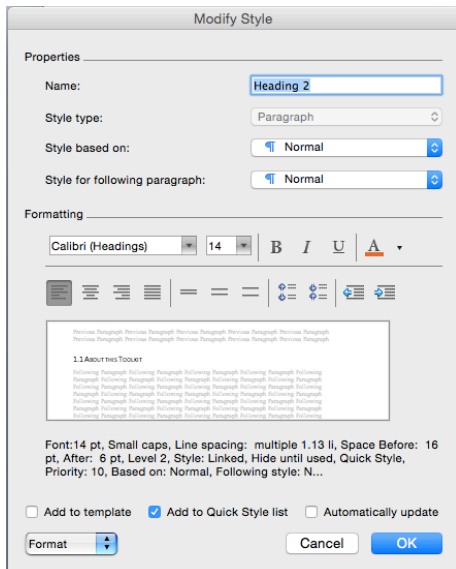
DETAILS OF THE INDIVIDUAL STYLES:

The style used in the Practice Toolkit is a modified version of the “Simple” Style. Details on each of the heading styles can be found below:

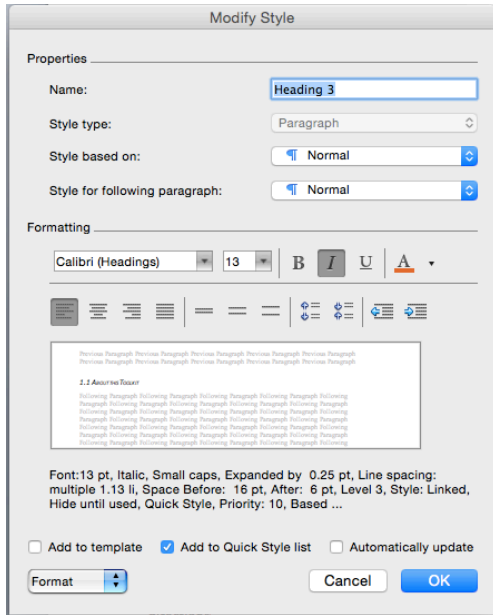
HEADING 1



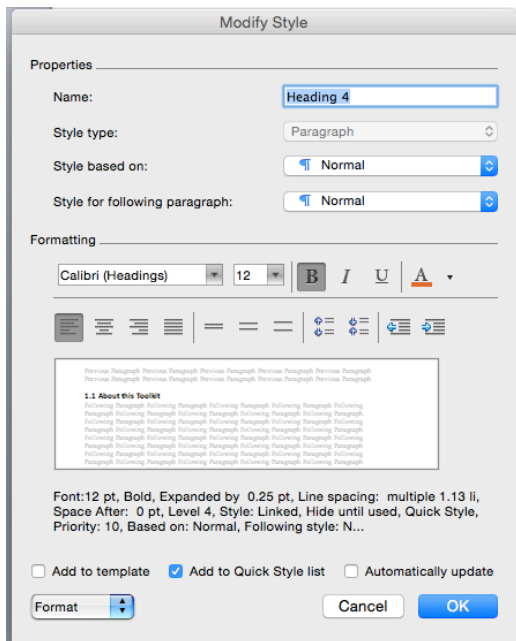
HEADING 2



HEADING 3



HEADING 4



NORMAL TEXT

Modify Style

Properties

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Style type:

Style based on:

Style for following paragraph:

Formatting

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li, Space After: 10 pt, Widow/Orphan control, Style: Quick Style

Add to template Add to Quick Style list