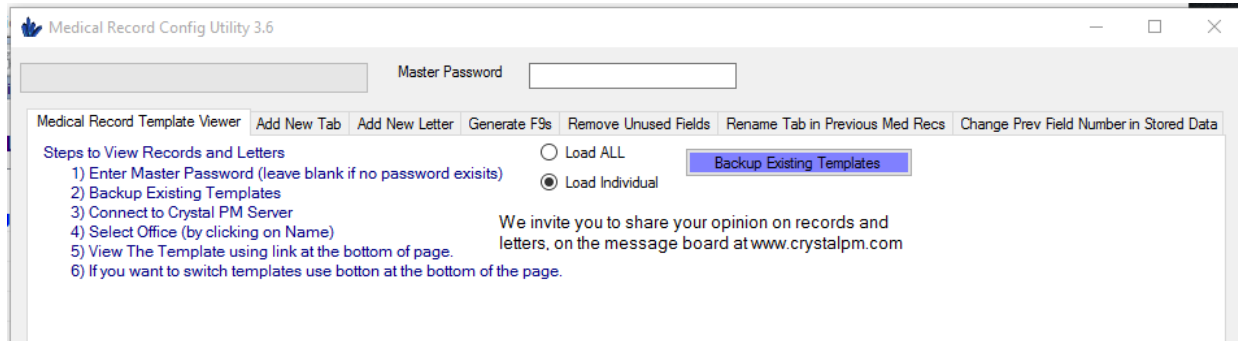# View and Import Other Offices Templates, Letters & Tabs

1. At the top of the screen, click on **EHR**, then Import Templates / **Med Rec Utility**
2. Now you should see the following screen:

3. Click **Backup Existing Templates** and Save the document. This is a backup of your template that can be restored in the case of an error or you do not like the changes.
4. This will open 4 additional boxes:

5. Make sure the box for **Load Individual** is checked, then select **Connect to Crystal PM Server**
6. Your screen should now show this:
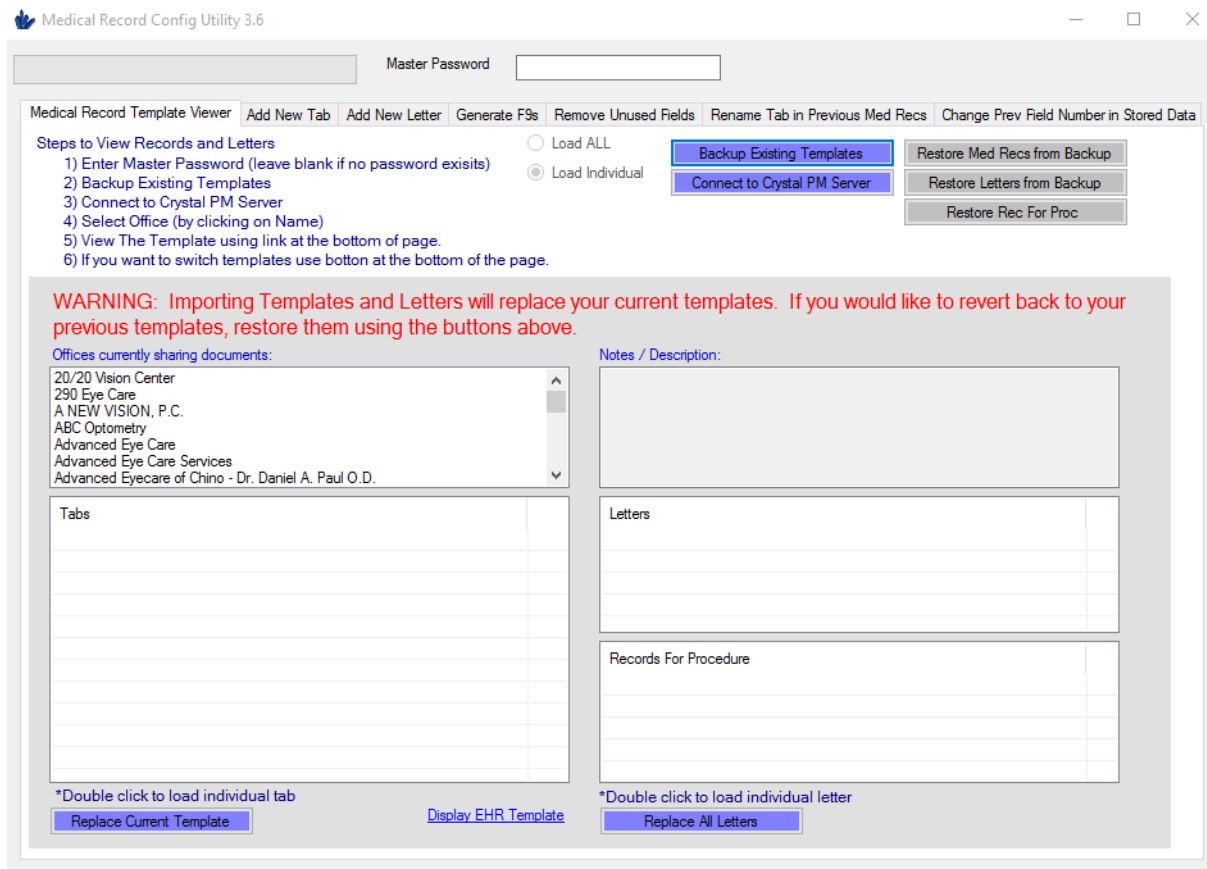
7. Select an office under **Offices currently sharing documents**
8. You should now be able to see the offices Tabs, Notes, Letters and Records for Procedure listed in the boxes.
9. At this time, you can click on **Display EHR Template** to get an idea of the flow and layout of the template. You can also **Replace Current Template** to replace your current template with the selection.
10. You can also select to just import a single tab from the template. To do this, click on the **Add New Tab** tab at the top of the screen. (NOTE: if you import a tab with linked fields or buttons, these will need to be reprogrammed as the Field IDs will change.)
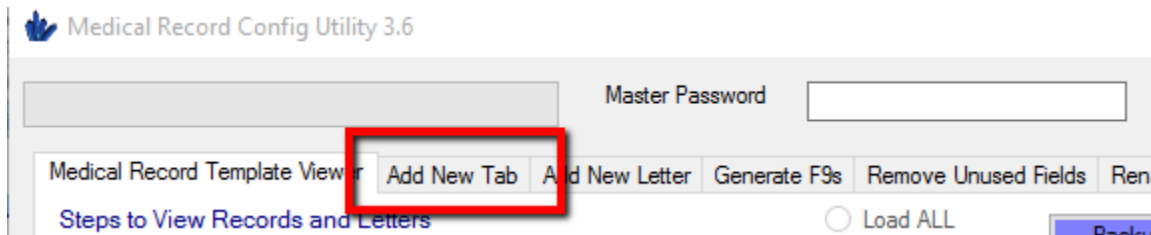
11. Here you can scroll through this list and select the tab you would like to import. Once you have selected your tab, click on **Load Tab**.
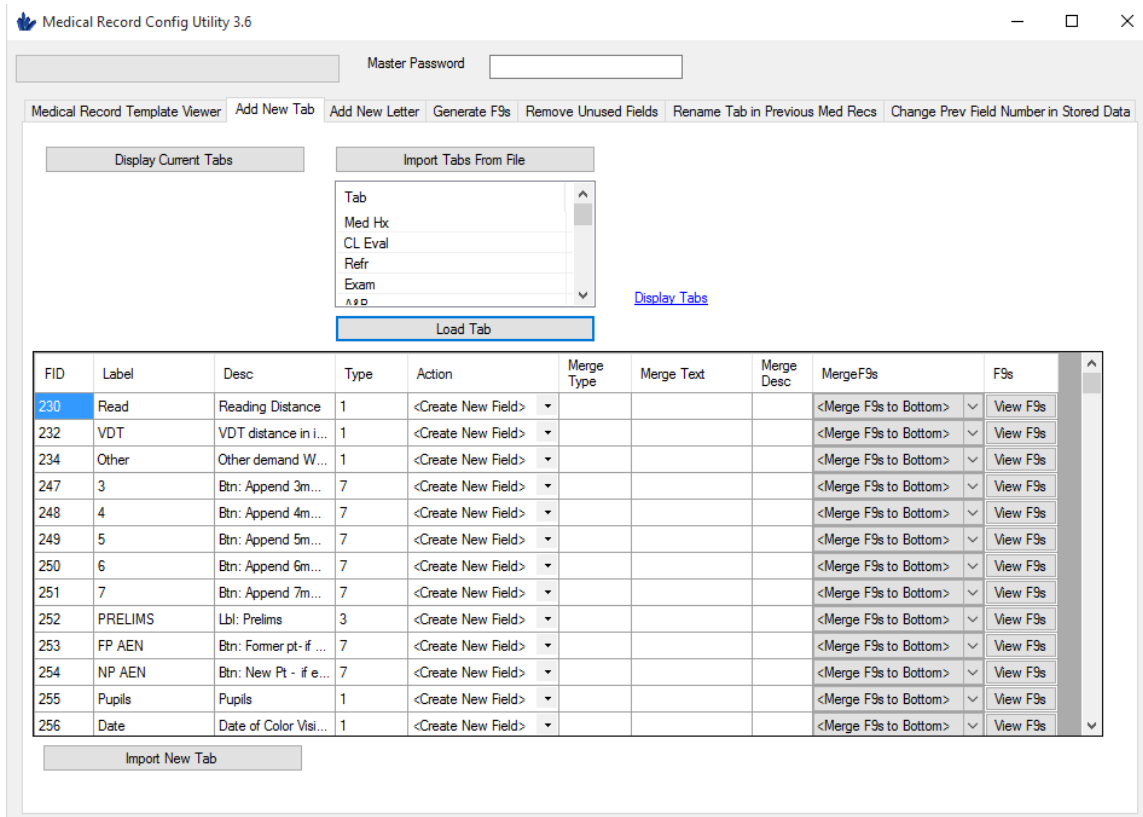
12. Now just select **Import New Tab** and that tab should now be located at the end of your template! (If at this time you do not see your new tab, this is probably due to the Versioning feature in Crystal which allows you to view old records in their original template. To disable this feature, you can uncheck it at Admin – Company – Records – Enable Versioning……)
13. Follow the same steps for **Add New Letter**