

How to Use HHS Word Templates

**Texas Health and Human Services
Civil Rights Office**

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TEXAS
Health and Human
Services

Table of Contents

Read This First!	3
Start a New Document	4
Attach a Template to an Existing Document	6
Using the Navigation Pane	8
Apply Styles	9
Heading Styles	9
Paragraph Styles	10
Character Styles	12
Linked (Character and Paragraph) Styles	13
Table Styles.....	13
Quick Parts	20
Missing Quick Parts	21
Table of Contents (TOC)	22
Insert Table of Contents	22
Update Table of Contents.....	23
Appendix A. HHS Reports Template	24
Quick Part Options	24
Styles	30
Page Numbering	30
Appendix B. Newsletter Template	31
Customized Graphic Header	31
Newsletter Table of Contents (TOC)	31
One Column or Two?	31
Images in Newsletters	32
Appendix C. Event Templates	34
Placeholder Text.....	34
Background Images	35
Event Invitation Template	35
Event Agenda Template.....	35

Read This First!

By default, every Microsoft document is built with the Normal template. This template is used to control the text appearance and behavior. HHS has created [Word templates](#) that include approved [branding](#) (styles and structure) and incorporate [accessibility](#) features. These templates meet HHS Communications requirements for consistent look and feel across the HHS Enterprise.

HHS templates have the following preformatted content and styles:

- **Quick Parts** and **Quick Tables** buttons have:
 - ▶ approved logos,
 - ▶ pre-formatted Table of Contents,
 - ▶ tables,
 - ▶ and more.
- **Styles** pane has paragraph and character styles.
- **Table Styles** has custom styles.

A Word template is saved as a **.dotx** file. **Never edit a template (.dotx file).**

Remember the following when creating your documents:

- Add descriptive [alternative text](#) for graphs, charts, and images.
- [Set up tables](#) using accessible design principles.
- Provide a well-organized [heading structure](#).

Use this guide and the information on the HHS Accessibility Center [Training page](#) to:

- ensure your document is usable by everyone, and
- ready for publication by the Communications Department.

Before you start writing your document, download and install Word templates:

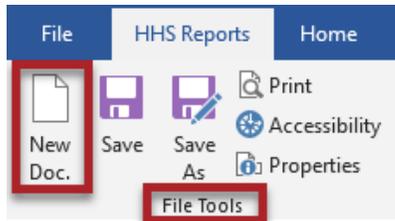
- [Using Software Center](#) [PDF document]
- [Manually](#) [PDF document]

For information on how to write a report, review [Guidelines for Writing a Report](#) in the Templates section of the HHS Connection home page.

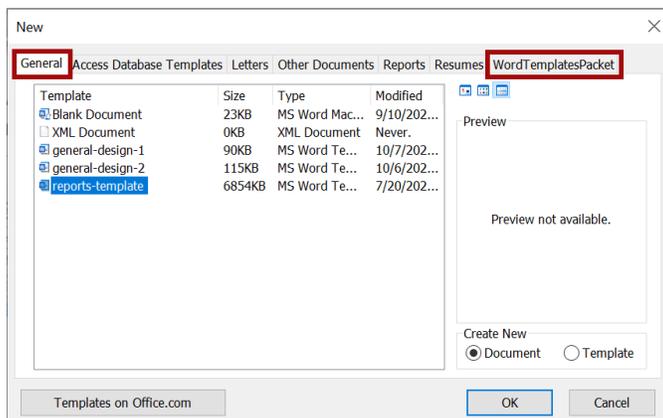
Start a New Document

After you have installed a template:

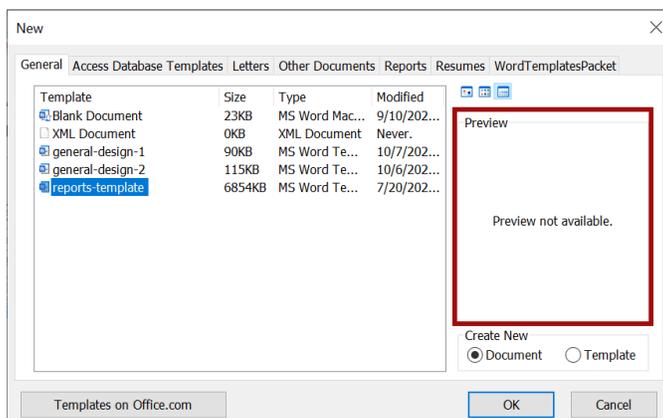
1. Open Word.
2. Go to the **HHS Reports** tab.
3. In the **File Tools** group, click the **New Doc.** button.



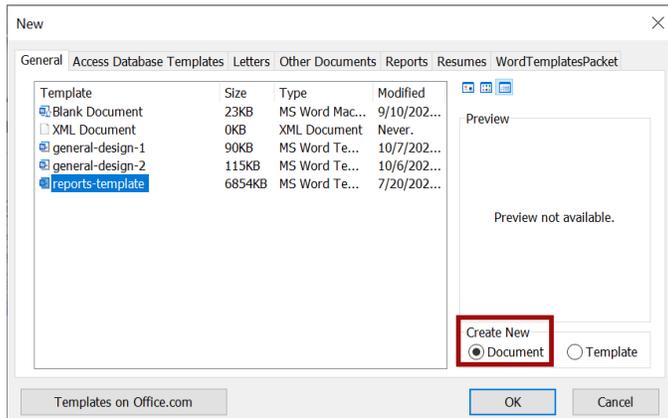
4. A **New** window will appear with all the templates you have downloaded in the **General** tab. Or, you may see a **WordTemplatesPacket** tab.



5. Select a template to preview it. Sometimes, a preview is not available.



6. Check to confirm that the **Document** option is chosen under **Create New**. This is the default setting.



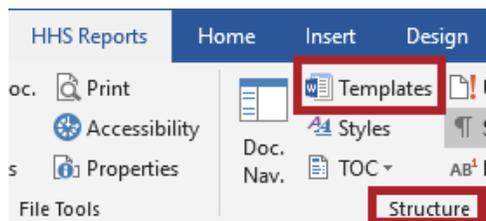
7. Click **OK** to use the selected template.
8. A new document will appear.
This document will have ready-to-use preset styles and other customized elements.
9. **Save** the document using a meaningful file name.

Attach a Template to an Existing Document

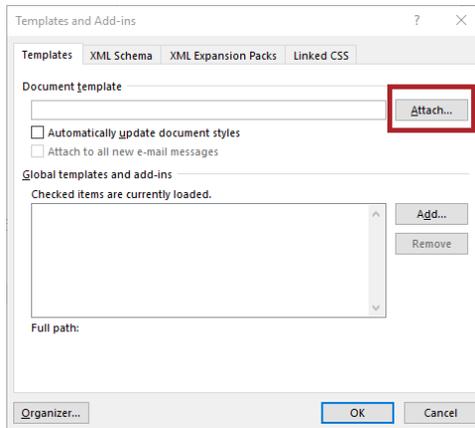
This process allows you to apply styles to an existing document and access **Quick Parts**. When using styles as meant to be used, attaching a template to the document will make it look the way it should. Although, the fonts and color scheme might still be wrong. You can fix the fonts and color scheme later.

WARNING: Template elements, such as **Quick Parts** or **Quick Tables**, are available **only** when the template is in the Microsoft Templates folder. Review the [Software Center template install instructions](#) or [manual template install instructions](#).

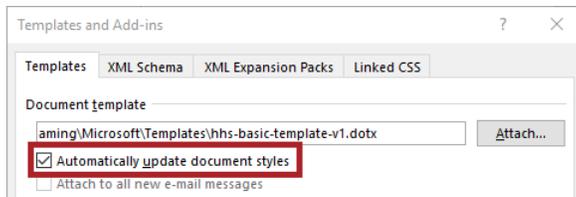
1. Confirm the file type of the document by checking the filename extension.
 - A. ***.docx** means you have the newer version. **Go to step 2** below.
 - B. ***.doc** means you have word 97-2003 format, which is an older version. [Convert](#) or save it as the most modern format available.
2. Attach the HHS template to your document. To do this:
 - A. Open the document.
 - B. Go to the **HHS Reports** tab.
 - C. In the **Structure** group, click on the **Templates** button.



- D. The **Templates and Add-ins** window will appear. You may see the "Normal" template or another HHS template name. Click the **Attach...** button.



- E. Navigate to and select the template that you want to apply.
F. Check **Automatically update document styles**.



- G. Click **OK**.
H. On the **HHS Reports** tab, click the **Templates** button again.
I. Uncheck the **Automatically update document styles** box.

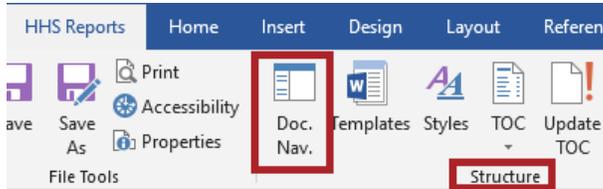
IMPORTANT NOTE: Doing this will prevent unintended changes to your document.

- J. **Save** the document using a meaningful file name.

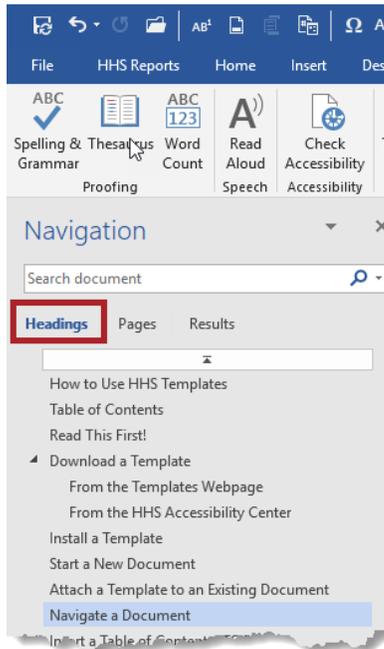
Using the Navigation Pane

The Document Navigation or **Doc. Nav.** pane organizes your document into a series of headings and pages. It allows you to quickly navigate through long documents.

1. Go to the **HHS Reports** tab.
2. In the **Structure** group, click on the **Doc. Nav.** button.



3. Select the **Headings** tab.



Apply Styles

A Word style is a set of predefined formatting, such as:

- font size,
- color, and
- paragraph spacing, which you can apply to individual words or entire paragraphs.

Use styles to efficiently apply a set of formatting choices throughout your document.

NOTE: Always use styles to format a document. Do not modify these styles because it can affect the quality of the document.

Heading Styles

Heading styles are paragraph styles with an outline level of 1 through 6. **Always use heading styles in hierarchical order.** For example: A Heading 3 must be a subheading in a Heading 2 section. A Heading 3 cannot be placed directly after a Heading 1.

Using heading styles properly will:

- Meet HHS branding and accessibility guidelines.
- Help users of screen readers navigate the document easily.
- Create a logical outline of the document.
- Help to create a table of contents easily.

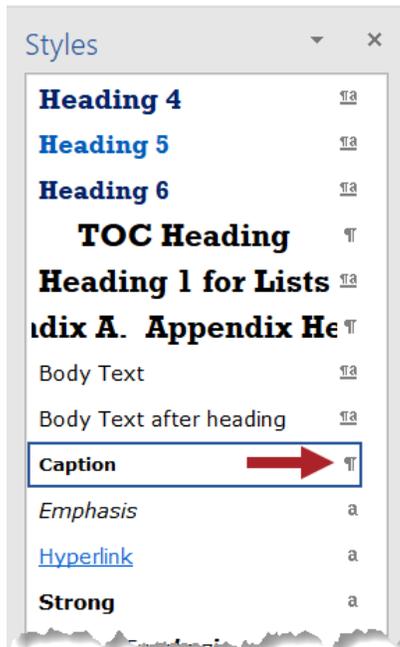
NOTE: The HHS templates have pre-customized heading styles. Do not modify these styles.

- **Heading 1** is for the main sections of your report. Numbered headings are optional.
- **Headings 2 through 6** are for the subsections of your document.
- **TOC Heading** is the heading for the document's table of contents.

Paragraph Styles

The paragraph symbol, ¶, identifies paragraph styles in the **Styles** pane. Use paragraph styles to format whole paragraphs at a time. To apply a paragraph style:

1. Click anywhere in the paragraph and select the style from the **Styles** pane.
2. Press the **Enter** key to continue using a paragraph style.

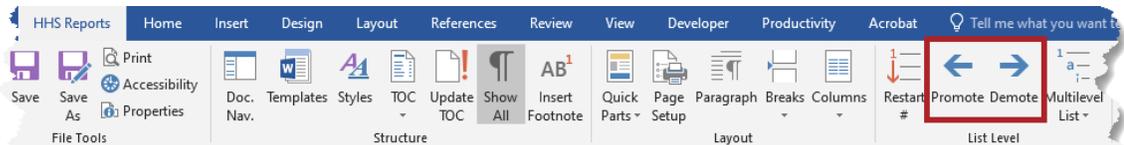


- **Caption** is a title for a figure, a table, or an equation description.
- **Block Text** is to give powerful attention on a section of text.

List Styles

List styles have various levels of formatting. To apply a list style:

1. Assign the list style from the **Styles** pane.
2. Go to the **HHS Report** tab.
3. In the **List Level** group, set the level using the **Promote** or **Demote** button.



The default for the next list item is always the level in use.

- **List Bullet** is for unordered list items. The order in these lists are not essential. **A solid black circle** precedes each item in the first level of bullets.
 - ▶ **A solid wedge pointing right** precedes each item in the second level of bullets.
 - ◇ **An open diamond** precedes each item in the third level of bullets.
- 1. **List Number** is for ordered list items. The order in these lists is essential, such as a procedure or a rankings list. **An Arabic numeral** precedes each item in the first level.
 - A. **An uppercase letter** precedes each item in the second level.
 - a. **A lowercase letter** precedes each item in the third level.
 - (1) For the fourth through sixth levels, the pattern repeats with a parenthesis.

List Paragraph is for other paragraphs of text that are placed in a single level in either list style. Use a soft return (**Shift+Enter**) when there are multiple paragraphs in a list item.

Use these list styles regardless of how many levels of bullets or numbers are in your list. Best practice dictates not to use more than three levels in a list. Consider using sub-headings and shorter lists.

WARNING: Multi-level lists spanning more than one page require extensive remediation in Adobe Acrobat Pro.

Character Styles

The character symbol, **a**, identifies character styles in the **Styles** pane. Use character styles to format:

- Letters
- Words
- Sentences

To apply a character style:

1. Highlight the text and select the style from the **Styles** pane.
2. Click to apply the style.

WARNING: Do not use character styles to create headings.

Use the following styles when you need to call attention to specific words or phrases:

- **Emphasis** - Use for italic text. Use this style sparingly because it causes difficulty for people with reading disabilities.
- **Hyperlink** – Use for [links](#). This style is automatically applied when you create a link.

NOTE: Hyperlinks should be the only underlined text in your document.

- **Strong** – Use this **for bolded text**.
- **Strong Emphasis** – Use this **for bolded italic text**.

Linked (Character and Paragraph) Styles

A linked style is a combination of character and paragraph styles. To apply a linked style, click anywhere in a paragraph and select the style from the **Styles** pane.

WARNING: If you select a part of the paragraph, Word applies the style only to the selected text. This may cause formatting inconsistencies that make it difficult to troubleshoot your document.

- **Body Text** is for the main part of the document text. It is the standard body style for HHS templates.
- **Body Text after heading** is for the first paragraph after a heading.
- **Quote** is an alternate design choice for specific words or phrases.
- **Table Content** is only for tables.

Table Styles

The HHS templates include **Custom Table Styles**. Use tables to present data such as numbers or text. Use a table when it is the best way to explain relationships with data.

WARNING: Do not use tables as a layout tool or to position

NOTE: If you have a very wide table, you may need to adjust its formatting or page orientation.

Table Style Examples

The following custom table styles have alternating shaded rows for presentation. This is particularly important for people who rely on magnification. Table properties are set correctly. The header row and first column have distinct formatting.

Accessible Table

Center Bottom aligned	Center Bottom aligned	Center Bottom aligned
Left Top aligned	Center Top aligned	Center Top aligned

Center Bottom aligned	Center Bottom aligned	Center Bottom aligned
Left Top aligned	Center Top aligned	Center Top aligned

HHS Financial Data

Center Bottom aligned	Center Bottom aligned	Center Bottom aligned
Bottom Left aligned	Bottom Right aligned	Bottom Right aligned
Bottom Left aligned	Bottom Right aligned	Bottom Right Aligned

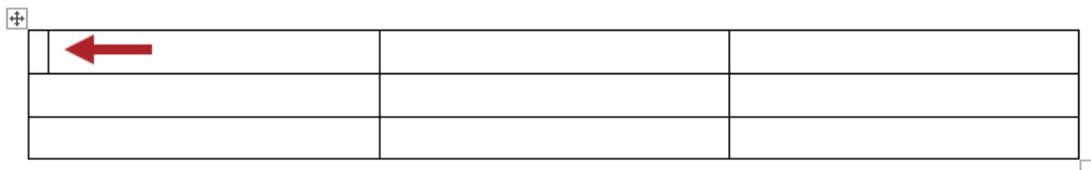
HHS Table for Text Data

This style is automatically applied to any table you create from scratch.

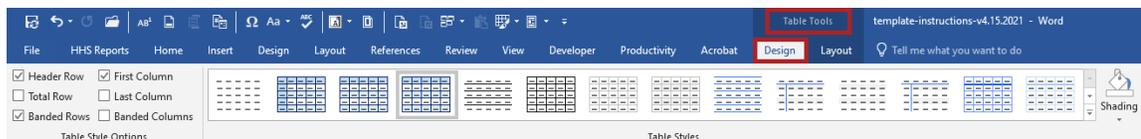
Center Bottom aligned	Center Bottom aligned	Center Bottom aligned
Top Left aligned	Top Left aligned	Top Left aligned
Top Left aligned	Top Left aligned	Top Left aligned

Format an Existing Table

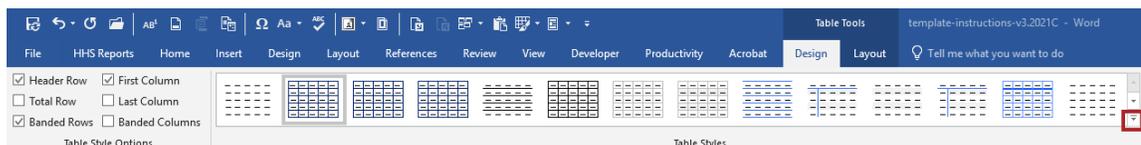
1. Place the cursor anywhere in a table.



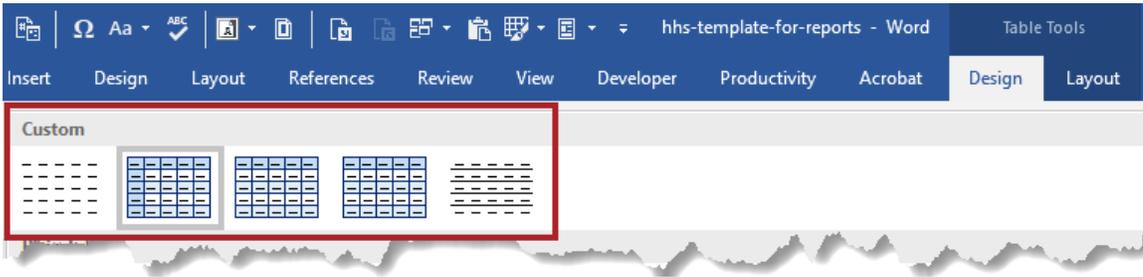
2. The **Table Tools** menu will appear. Go to **Design** tab in the **Table Tools** menu.



3. In the **Table Styles** group, click on the **More** drop-down arrow.



4. Select a table design from the **Custom** section. The custom table style is now applied to your table.



Accessible table styles are applied to the table.

Column Header	Column Header	Column Header
Row Header	Data	Data
Row Header	Data	Data

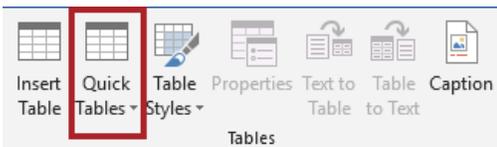
Add Quick Tables

Quick Tables in Word are preformatted commonly used table designs. All HHS Quick Table options are under the **Accessible** category.

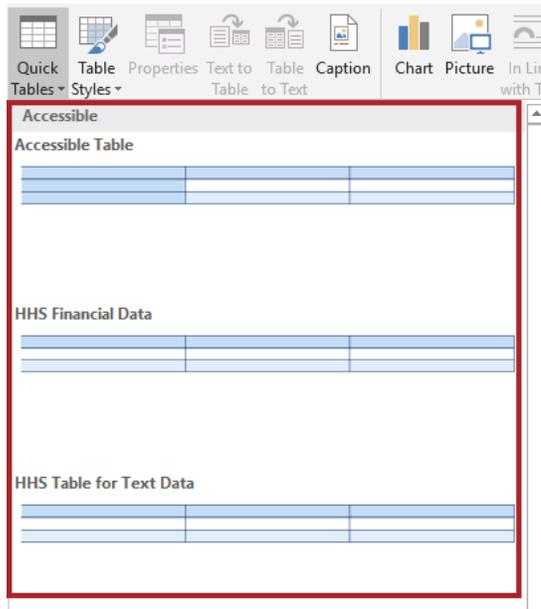
1. Place the cursor where you want to insert the table.
2. Go to the **HHS Reports** tab **Tables** group



3. Click on the **Quick Tables** button.



4. A menu will open, and thumbnail images of tables will appear within it.



5. To insert a Quick Table, click on its thumbnail image.

Preformatted Tables

The HHS templates include preformatted tables:

- *Table+Notes* (table that includes footnotes)
- *Table-Landscape* (table formatted in landscape orientation with page breaks and footnotes)

NOTE: If you have a very wide table, you may need to adjust its formatting or page orientation.

Find preformatted tables under the **Quick Tables** and **Quick Parts** buttons.

- These tables use the HHS Financial Data table style. You can quickly change the style from the **Table Styles** button.
- Neither type of preformatted table includes a preview thumbnail.
- The footnotes will appear at the bottom of the page. If the table is the last thing on the page, they will be directly after the table.

When *Table+Notes* or *Table-Landscape* are inserted, the table will have filler data.

To clear the data:

1. Select the table.
2. Press the **Delete** key once.

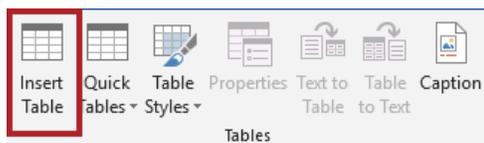
Insert a Table

HHS Table for Text Data is the default table.

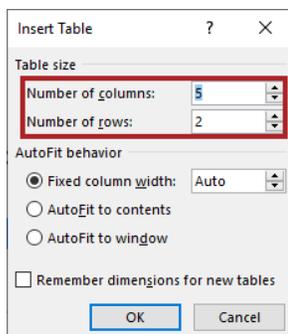
1. Go to the **HHS Reports** tab **Tables** group.



2. Click the **Insert Table** button.



3. The **Insert Table** window will appear. Enter the number of columns and rows.



4. Click **OK**.

Adjust the Features of a Table

Even if all the tables in your document are the same style, they might not all need the same features.

The position of header cells can vary. The examples below use the **Accessible** table style.

Tables usually have column headers in the top row.

Column Header	Column Header	Column Header
Data	Data	Data
Data	Data	Data

Many tables also have row headers in the first column.

Column Header	Column Header	Column Header
Data	Data	Data
Data	Data	Data

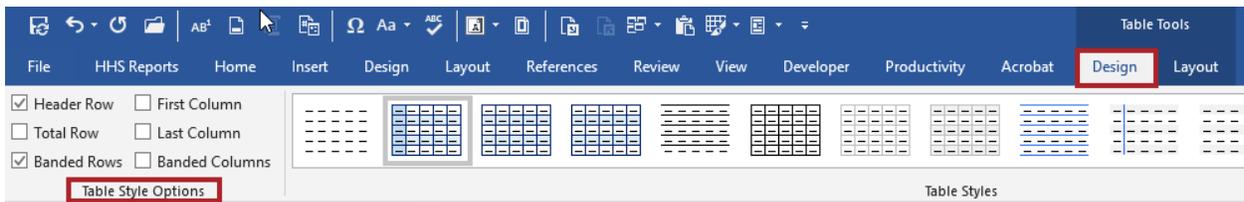
Rarely, tables only have row headers. These tables should never be more than two columns wide.

Row Header	Data
Row Header	Data
Row Header	Data

In addition to header cells, some tables will have totals in the bottom row, in the last column or both.

Column Header	Column Header	Column Header
Data	Data	Last Column
Total Row	Total Row	Last Column

All the table features are controlled through the **Table Style Options** group. Turn them on or off by selecting the appropriate checkbox.



- **Header Row** is checked in all custom table styles by default.
 - ▶ If the top row contains headers for each column, leave it checked:
 - ◇ Each entry in the top row will be bold.
 - ◇ The whole row will have a medium blue background.
 - ◇ The row is a header row.
 - ◇ If the table breaks across pages, the header row will repeat on each page.
- **First Column** is checked in all custom table styles by default.
 - ▶ If the first column contains headers for each row, leave it checked:

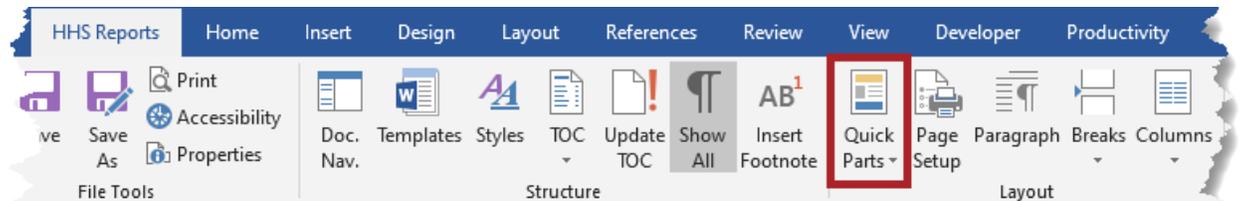
- ◇ Each entry in the first column will be bold in the Accessible Table and HHS Financial Data table.
- **Total Row** is unchecked in all custom table styles by default.
 - ▶ If the bottom row includes column totals, select this option. Cells in the bottom row will have a medium blue background, and entries in them will be bold.
- **Last Column** is unchecked in all custom table styles by default.
 - ▶ If the last column is for row totals, select this option. Cells in the last column will have a medium blue background, and entries in them will be bold.
- **Banded Rows** is checked in all custom table styles by default. Banding alternate rows makes the table accessible to people with low vision. Do not use this option with banded columns.
- **Banded Columns** is unchecked. It is not an available option in all custom table styles by default. Banded columns are usually not needed in data tables. Do not use this option with banded rows.

Quick Parts

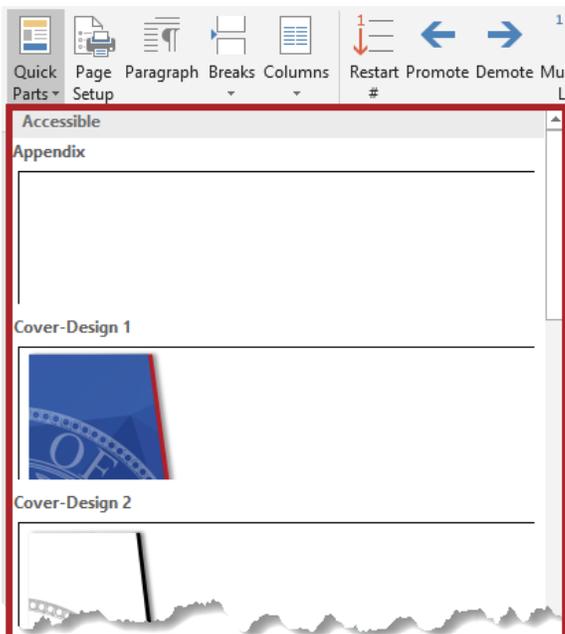
Quick Parts are sections of preformatted content you can insert into a document. [Table+Notes and Table-Landscape](#) are **Quick Parts** that are available in HHS templates. Quick Part options vary across the templates.

To insert a **Quick Part**:

1. Place the cursor where you want to insert the **Quick Part**.
2. Go to the **HHS Reports** tab.
3. Click on the **Quick Parts** button in the **Layout** group.



4. At the top of this menu, you will see a thumbnail image of each Quick Part. Click to insert the Quick Part.



Missing Quick Parts

Template elements such as **Quick Parts** or **Quick Tables** are available **only** when a template is in the Microsoft Templates folder.

If you do not see any of the preformatted content in your **Quick Parts** or **Quick Tables** gallery:

- Chances are you opened the template from an email,
- The template is not saved on your local templates folder,
- Or the template is not attached to the copy of the document you are editing.

To fix this issue, follow the steps in the [Software Center template install instructions](#) or [manual template install instructions](#) and [Attach a Template to an Existing Document](#).

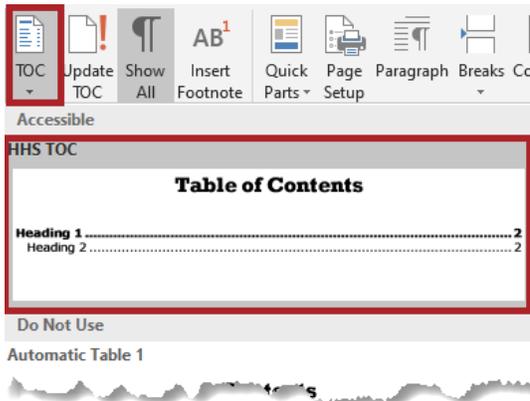
Table of Contents (TOC)

A table of contents is based on the heading levels in the document. The **HHS TOC** design only includes Heading 1s and Heading 2s. Formal reports need a table of contents. A table of contents is optional for informal reports or other documents.

Insert Table of Contents

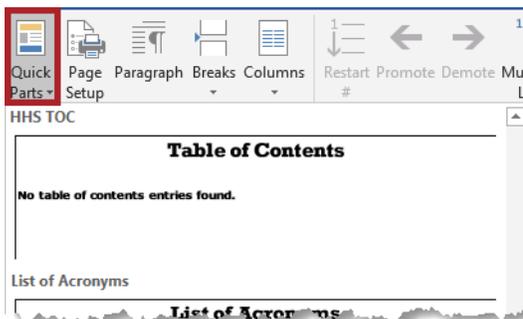
Method A: Using the TOC Button

1. Go to the **HHS Reports** tab.
2. Click the **TOC** button in the **Structure** group.
3. Select **HHS TOC** from the **Accessible** category.



Method B: Using the Quick Parts Button

1. Go to the **HHS Reports** tab.
2. Click the **Quick Parts** button in the **Layout** group.
3. Select **HHS TOC** from the **Accessible** category.



Update Table of Contents

To **update an existing table of contents**, do the following:

1. Click in the table of contents.
2. Click on **Update Table**. The **Update Table of Contents** window will appear.
3. Select the **“Update entire table”** option.



Appendix A. HHS Reports Template

This appendix covers information specific to the HHS Reports template. Use the HHS Reports template for documents which need a table of contents and a cover page.

Examples include:

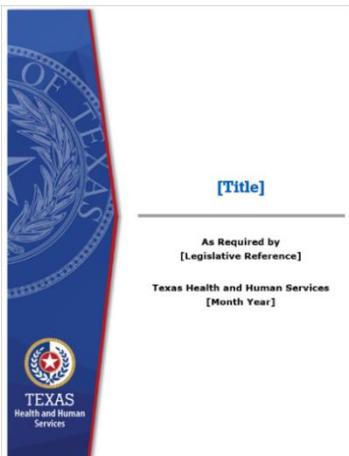
- Legislative, annual, or quarterly report
- Training manual
- Procedure manuals
- Strategic plan

Quick Part Options

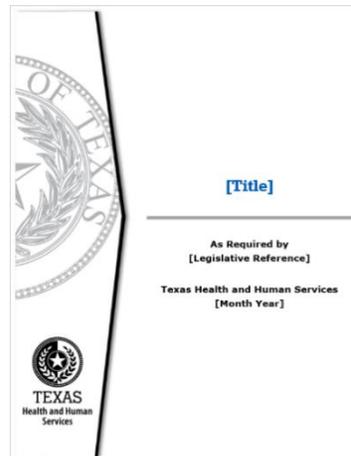
Cover Page

The following cover pages are **only** available when using the HHS Reports template. Use a cover page to give the document a standard and professional appearance. The choice of the cover page is up to the author.

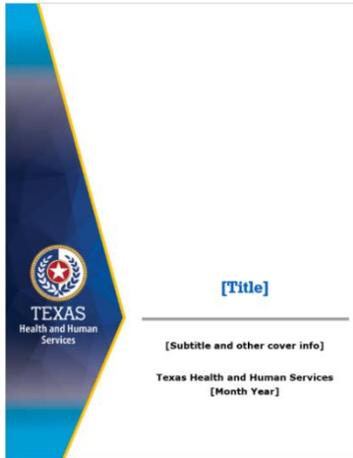
Cover-Design 1



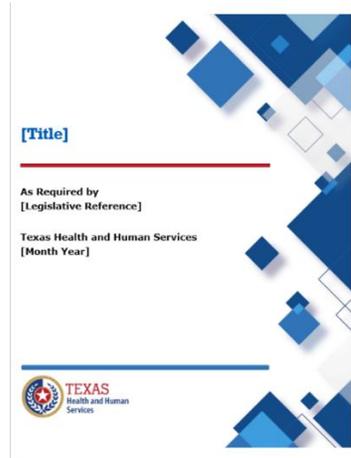
Cover-Design 2



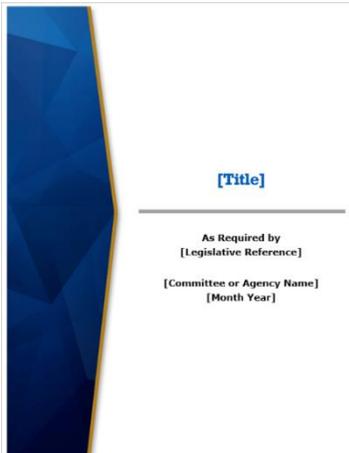
Cover-Design 3



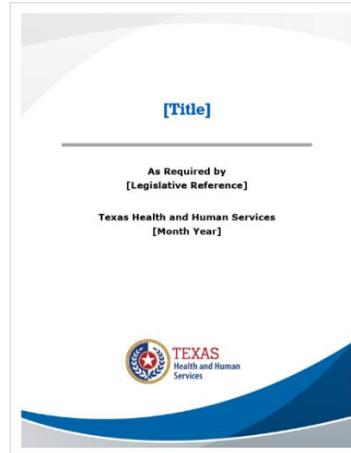
Cover-Design 6



Cover-Design 4



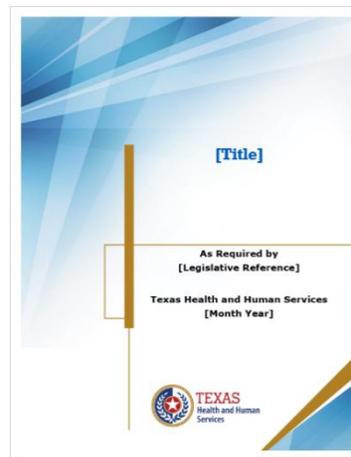
Cover-Design 7



Cover-Design 5



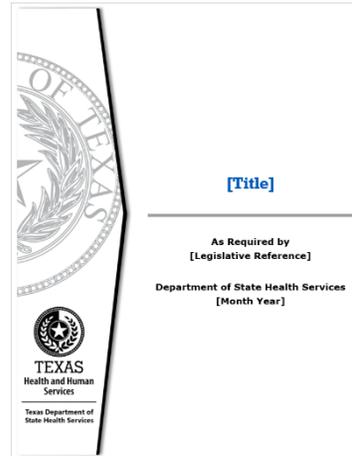
Cover-Design 8



Cover-Design 9



Cover-DSHS

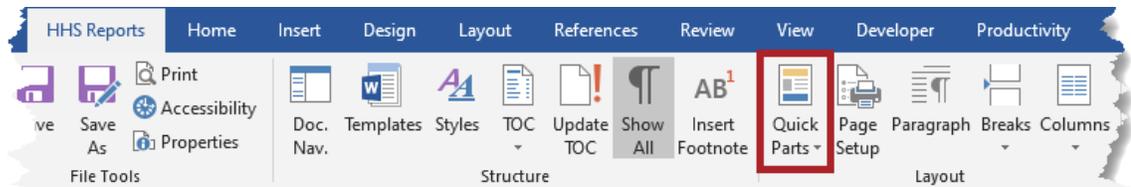


Insert a Cover Page

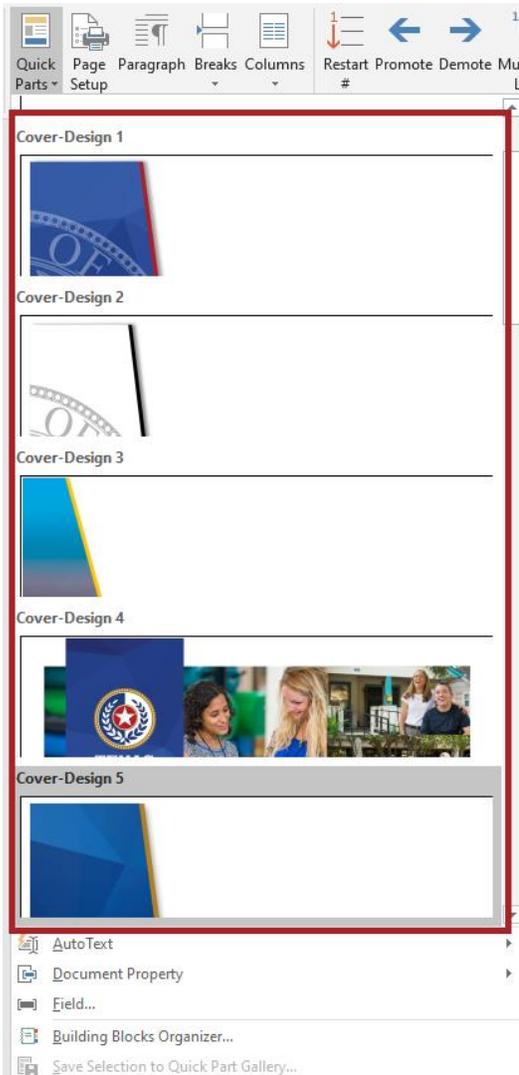
All HHS formal reports should have a cover page. Choose from any of the nine cover page options based on your needs.

To add a cover to your document:

1. Place the cursor at the start of the document.
2. Go to the **HHS Reports** tab.
3. Click on the **Quick Parts** button in the **Layout** group.



4. A menu will open. There are thumbnail images of each customized cover page in the **Accessible** category.



5. Click on the thumbnail to insert the cover page.
6. Delete the brackets and make edits to:
 - a. Title
 - b. Legislative Reference
 - c. Agency Name
 - d. Date

Cover Page Styles

The spacing before and after the Title and Subtitle styles need to change with the cover page design.

- In Cover-Designs 1, 2, 3, 4 and Cover-DSHS the horizontal bar should line up with the apex of the graphic.



- In Cover-Design 8, the title should be above the horizontal gold bar and subtitle after.



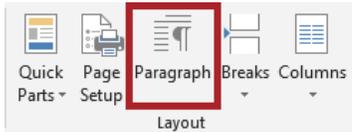
- In Graphic Design 9, the title should be in the blue checkered left angle bracket and the subtitle after.



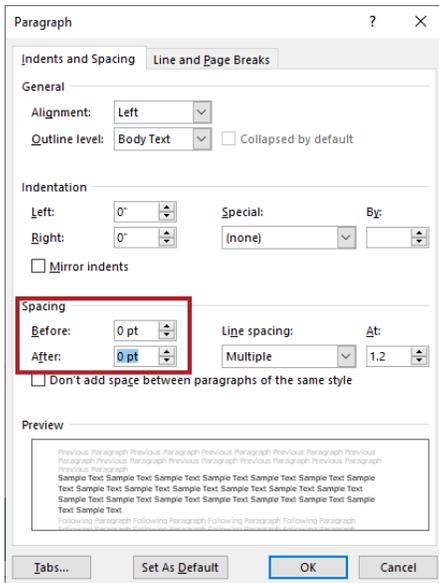
To align the Title or Subtitle styles with the graphic design:

1. Go to the **HHS Reports** tab.

2. Select the **Paragraph** button in the **Layout** group.



3. Modify the **Spacing Before** and **After** fields only and click **OK**.



Appendix

The **Appendix** Quick Part button adds the heading for a new appendix **and** a page break before it. The heading adds the label — “Appendix A,” for example — to the beginning of the heading.



This label automatically adjusts when you add or delete other appendices.

Insert List of Acronyms

Use the **List of Acronyms** Quick Part to create a table for acronyms or definition lists. Add a new row to the table for each acronym. This feature is also available in the **Quick Tables** button.

Appendix B. Newsletter Template

This appendix covers information specific to the Newsletter template.

Customized Graphic Header

To get a customized and branded header for your newsletter template, contact HHS.Communications@hpsc.state.tx.us.



Newsletter Table of Contents (TOC)

When using the newsletter template include a table of contents. It should appear on the first page. The Newsletter TOC includes Headings 1s and a yellow border around the TOC Heading and TOC 1 heading.

<i>In this issue...</i>	
Customized Graphic Header	1
Newsletter TOC.....	1
One Column, or Two?.....	1
Images	2

One Column or Two?

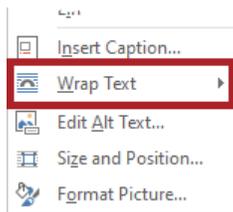
This template works best for a single column of text. Before using more than one column in your newsletter, consider:

- Do you have time to put the content in two columns for each page in a way that it reads easily? Creating and managing a two-column layout is time consuming.
- Do you intend for people to read your newsletter on a screen? It is easier to read single-column documents on a screen.

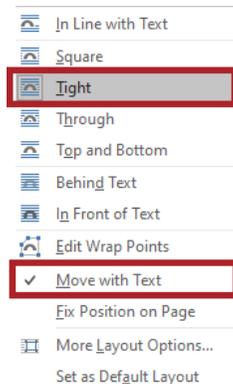
Images in Newsletters

Typically, images need to be in line with text. Because newsletters are short, you can wrap the text around the image. To do this:

1. Right click on the image.
2. A menu will open. Hover on **Wrap Text**.



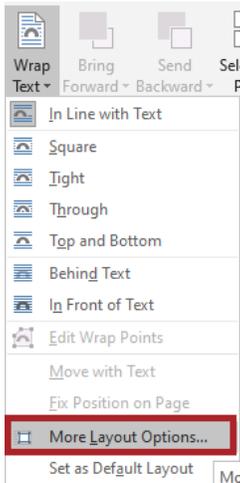
3. A sub-menu will open. Click both **Tight** and **Move with Text**.



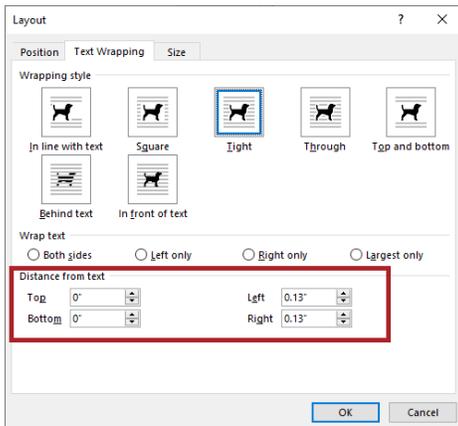
WARNING: An image set with wrapped text will not be placed in the correct reading order in PDF.

Make sure there is enough space between the image and surrounding text.

1. Follow steps 1 and 2 from the process above.
2. A menu will open. Click **More Layout Options**.



3. A window will open. Set **"Distance from text"** to customize the spacing.



4. Click **OK**.

WARNING: Do not insert a caption for an image in Newsletters. Inserting a caption creates a text box when Wrap Text is set to Tight. Text boxes are not accessible in Word.

Appendix C. Event Templates

This appendix covers information specific to the Event templates. Use Event templates to create accessible:

- invitations and agendas for internal trainings, or
- office gatherings.

NOTE: All events need management approval. Use of these templates must align with HR guidelines and policies.

Placeholder Text

Both templates have text placeholders to type:

- Location,
- Date and Time,
- and a short descriptive paragraph.

[Location]

[Date and Time]

[Descriptive paragraph here. Keep it short.]

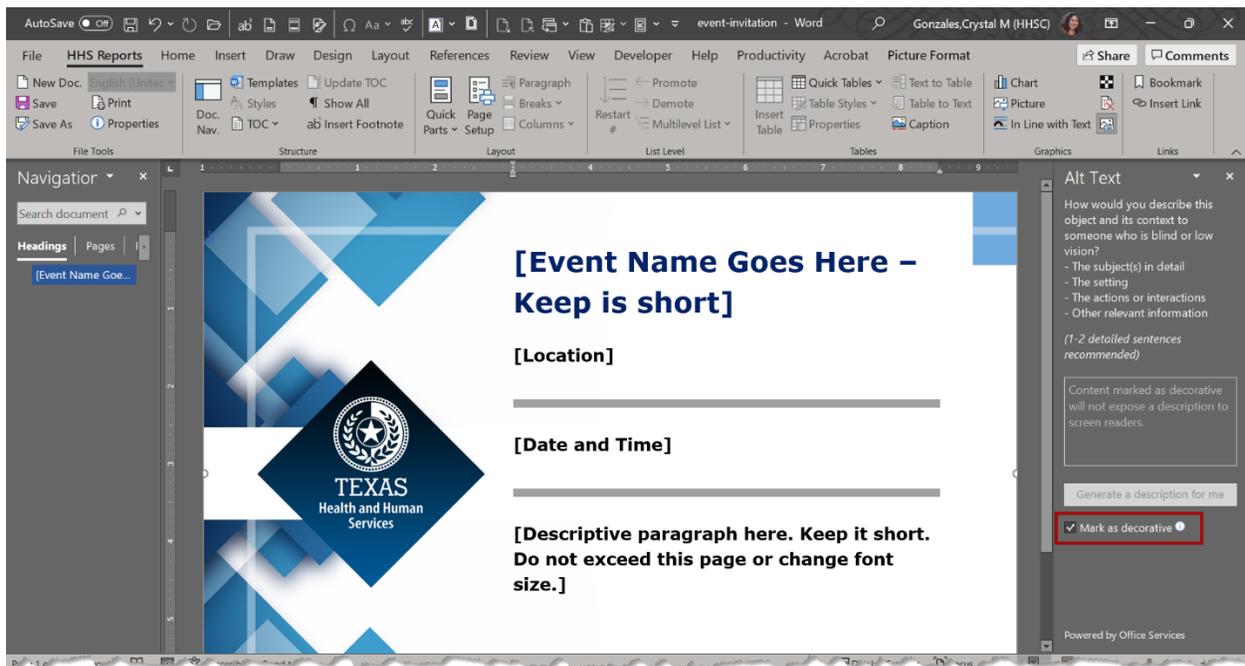
This text **must not** exceed the first page. Delete the brackets and placeholder text. Fill that section out with the appropriate information.

In case of issues, a **Text and Horizontal Lines** Quick Part is available.

Background Images

For each background image your word template has:

1. Go to the Alt Text panel.
The [Images](#) training has information on how to get to the alt text panel.
2. Check the **Mark as decorative** check box for each background image in your Word template.
If you don't have the **Mark as decorative** check box, complete extra steps to remove it in PDF.



Event Invitation Template

This template **must not exceed** the first page!

Event Agenda Template

This template **must not exceed** more than a handful of pages. Write a maximum of half a page for each Day section. To add more days to your agenda Word template, use the **Interior Page Framework** Quick Part.

Also, delete the brackets and placeholder text within each Day section. Fill that section out with the appropriate information.