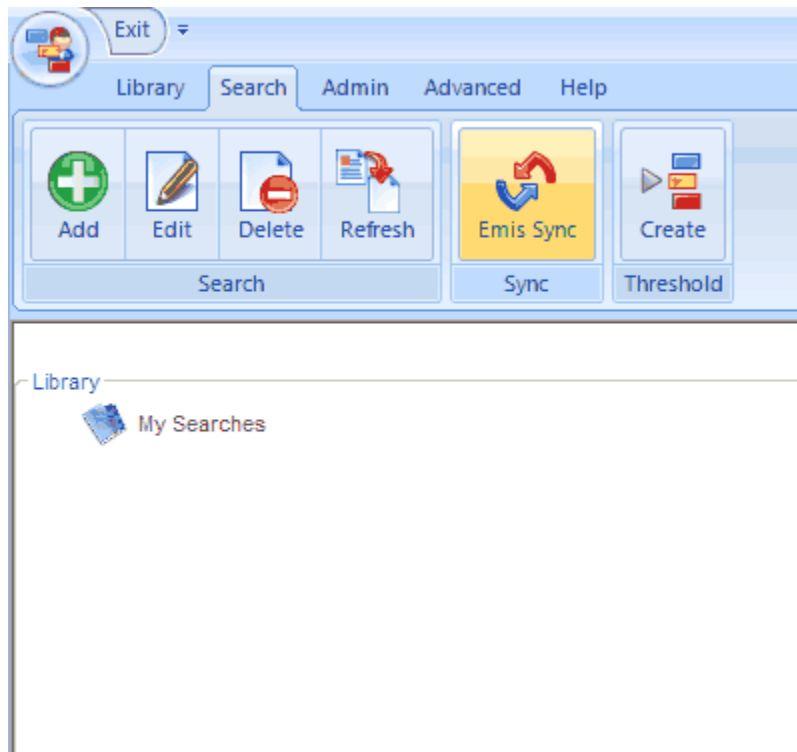


## Mail Merging – Creating month of birth recall letters

In this section you will be shown how to:

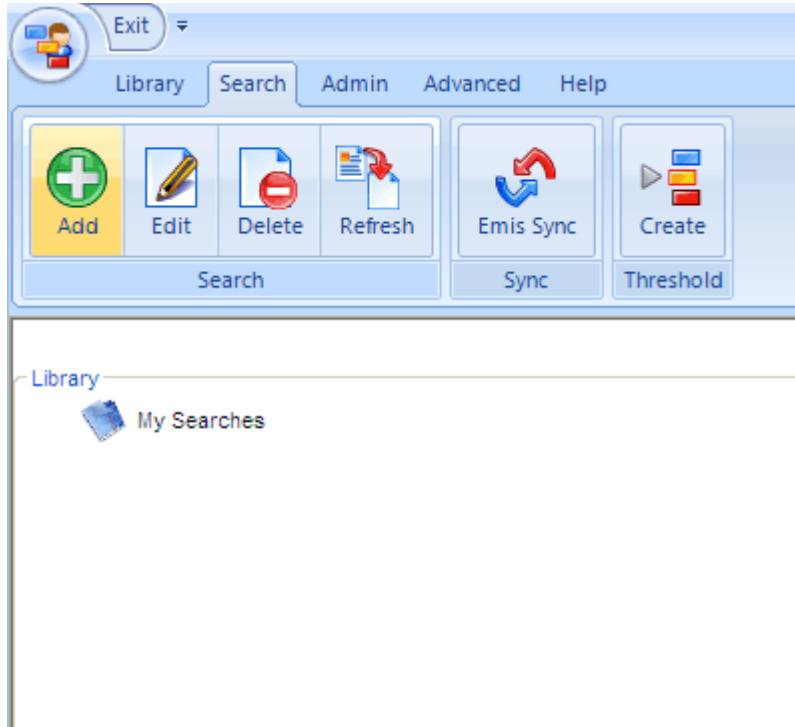
- Create patient invite letters based on their month of birth.

Step 1 – Sync with EMIS

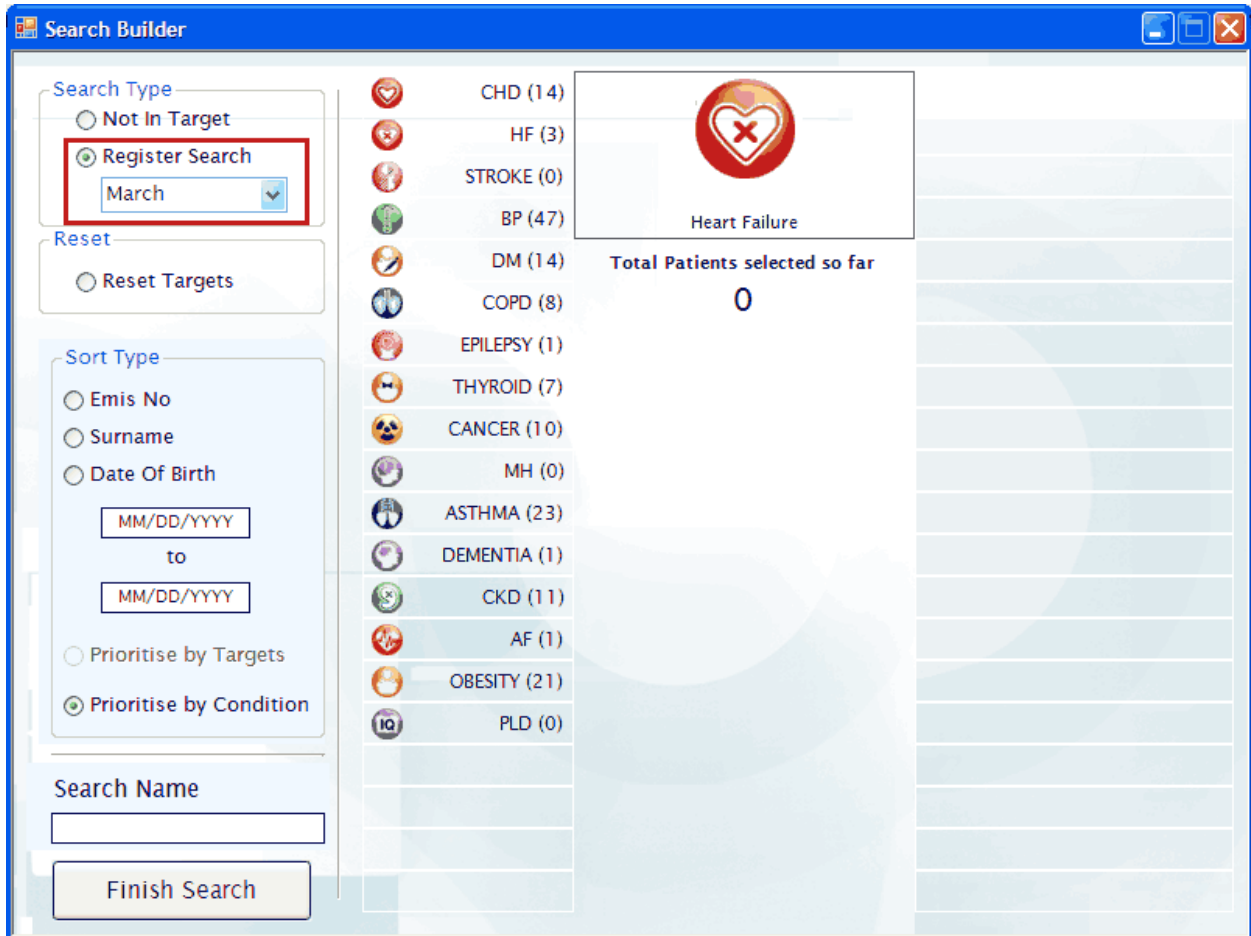


Syncing with EMIS will pull into PatientChase details of patients who are on your chronic disease registers.

Step 2 – Add a new search



Step 3 – Select 'Register' search

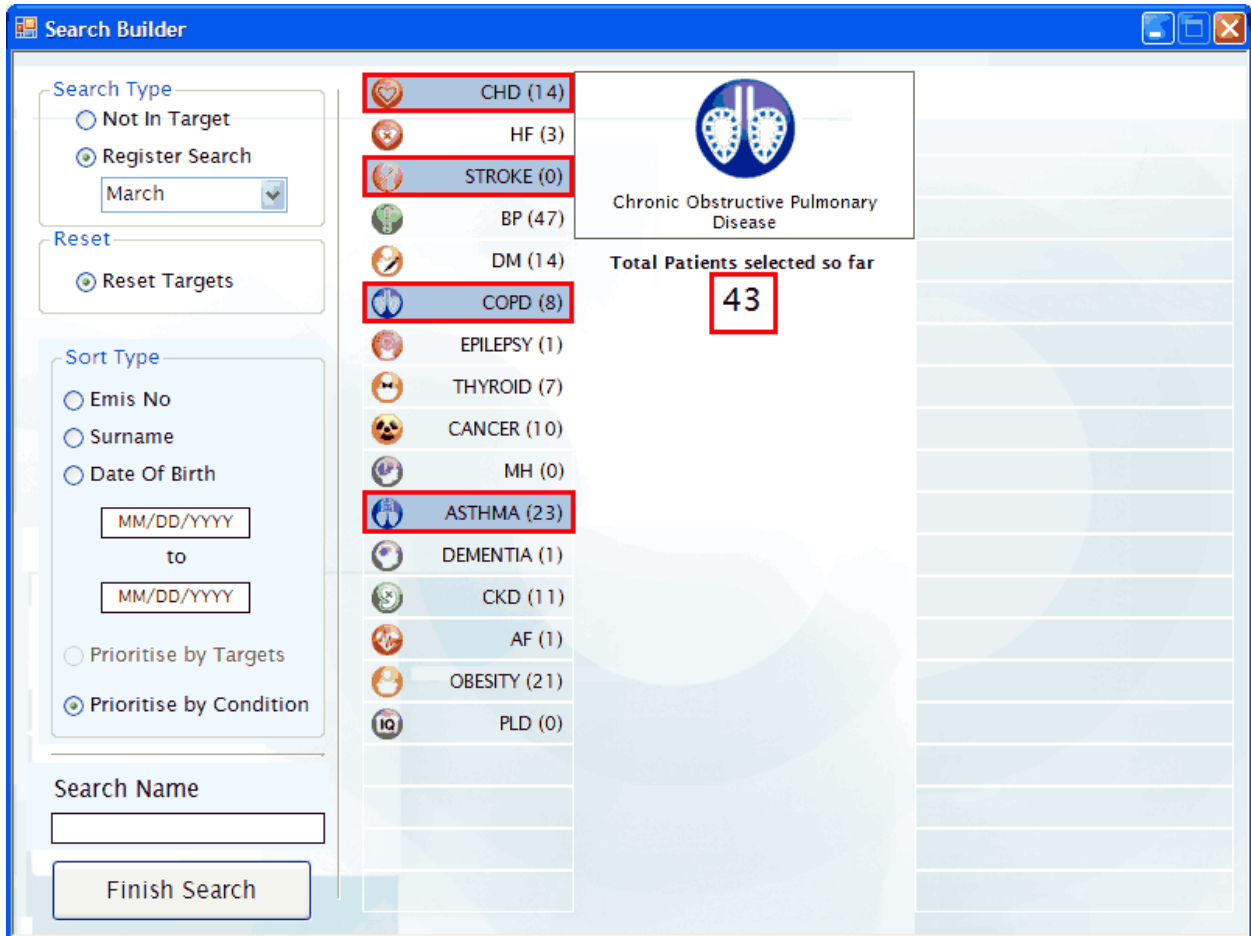


From the drop down, choose the month of birth.

Notice that once you've selected the month, the numbers alongside each register name change. These figures represent how many are people are on that register and born in that particular month.

In the example above, 14 patients born in March have CHD.

Step 4 – Select your register/s

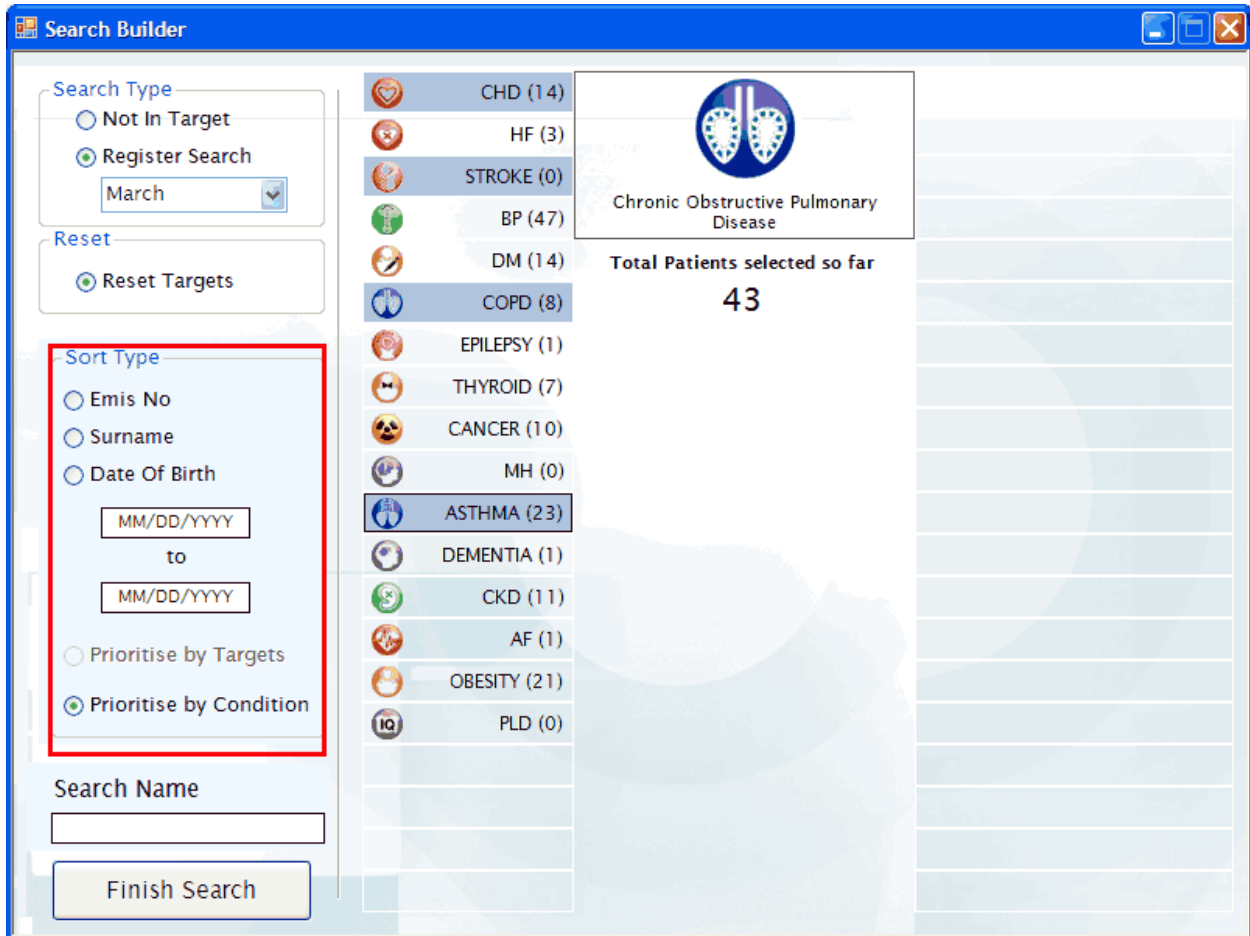


In this example, CHD, Stroke, COPD and Asthma patients who were born in March were selected to form the group of patients to be recalled.

PatientChase found there are 43 patients within this group.

Some of these patients will be on 2, 3 or even 4 of the registers selected.

Step 5 – Determine the sort order to view your results.



Before viewing the list of patients in your search, decide what order you'd like them displayed in.

The display order will be the order your letters come out in the mail merge.

By default, 'prioritise by condition' is selected as this is the most popular among surgeries.

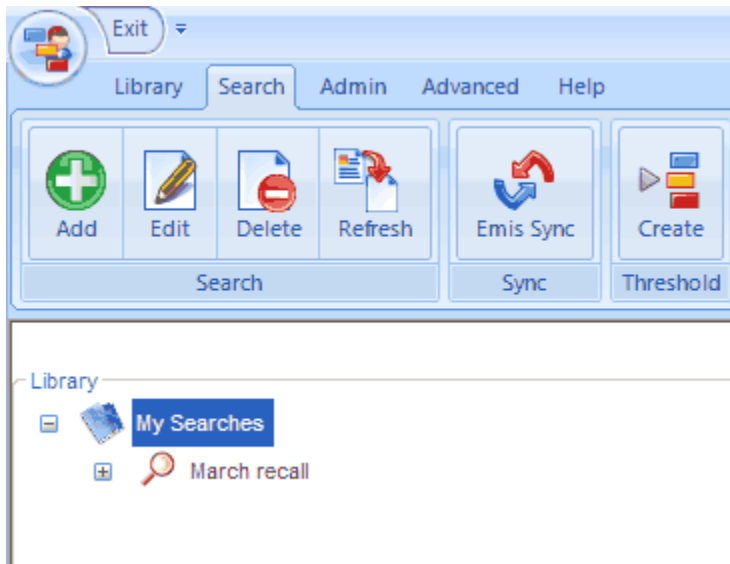
What this means is that the patients who feature on the most number of registers will be displayed at the top of your results and therefore invited in first.

Step 6 – Name your search and click Finish

The screenshot shows the 'Search Builder' window with the following elements:

- Search Type:**  Not In Target,  Register Search (March)
- Reset:**  Reset Targets
- Sort Type:**  Emis No,  Surname,  Date Of Birth (MM/DD/YYYY to MM/DD/YYYY),  Prioritise by Targets,  Prioritise by Condition
- Conditions List:** CHD (14), HF (3), STROKE (0), BP (47), DM (14), COPD (8), EPILEPSY (1), THYROID (7), CANCER (10), MH (0), ASTHMA (23), DEMENTIA (1), CKD (11), AF (1), OBESITY (21), PLD (0)
- Heart Disease Summary:** Total Patients selected so far: 43
- Thresholds:** Current % and Current Points fields, Threshold % input field.
- Search Name:** March recall
- Buttons:** Finish Search (highlighted with a red box)

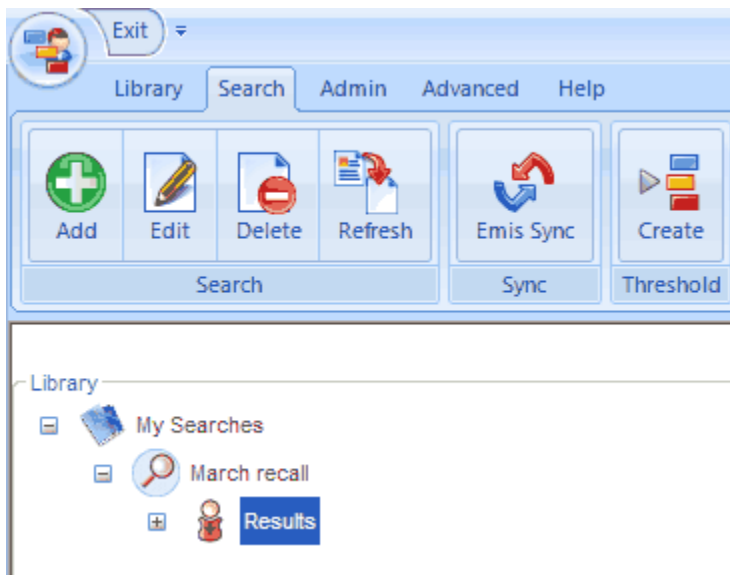
Step 7 – Loading your results



Click the + sign next to 'My Searches'.

Next:

Click the + sign next to the name of your search.



Next, click on the word 'Results'.

Step 8 – Viewing your results

	Dateln	Conditions	CHD	STROK	COPD	ASTHMA	SurName	FirstName	EmisN	Title	S	DateOfBirth	NHSN
1		CHD,COPD	CHD		COPD		Thoday	Lubomira	19003	Mrs	F	24/03/1966	567856
2		COPD,ASTHMA			COPD	ASTHMA	Winter	Kerensa	6954	Mrs	F	24/03/1928	575994
3		ASTHMA				ASTHMA	Edgell	Benoit	19342	Mrs	F	29/03/1922	803659
4		ASTHMA				ASTHMA	Rafferty	Paola	25203	Mr	M	04/03/1938	504622
5		ASTHMA				ASTHMA	Sowter	Vicki	22712	Mrs	F	20/03/1957	487282
6		CHD	CHD				Bennett	Annelize	24845	Mrs	F	18/03/1922	302008
7		CHD	CHD				Taylor	Nicola	23748	Mrs	F	09/03/1953	237638
8		CHD	CHD				Fox-Bregman	Kaye	22736	Mrs	F	16/03/1961	457227
9		CHD	CHD				Thornton-Allen	Leza	21637	Mrs	F	12/03/1949	781913
10		CHD	CHD				Irons	Antoinette	19350	Mr	M	07/03/1953	522594
11		COPD			COPD		Eskander	Shauna	2504	Mrs	F	24/03/1964	709374
12		ASTHMA				ASTHMA	Wabali	Johanette	7829	Mrs	F	13/03/1927	489318
13		CHD	CHD				Hullah	Jaimee	2120	Mr	M	27/03/1982	248136
14		CHD	CHD				Richings	Abraham	6588	Mr	M	07/03/1934	795619
15		ASTHMA				ASTHMA	Woogara	Cecile	25930	Mrs	F	15/03/1956	683566
16		ASTHMA				ASTHMA	Lacey	Morag	25278	Mr	M	23/03/1923	649037
17		ASTHMA				ASTHMA	Thornton-Allen	Leza	24337	Mrs	F	12/03/1949	781913
18		CHD	CHD				Nicholas	Melinda	24456	Mrs	F	20/03/1966	321428
19		COPD			COPD		Kwan	Mercedes	21542	Mrs	F	10/03/1960	598868
20		CHD	CHD				Glynn	Gwenda	12338	Mrs	F	04/03/1951	567427
21		ASTHMA				ASTHMA	Nicklin	Stanislav	8264	Mr	M	27/03/1986	712827



**Date of Search: 07/12/2011**  
 Search :Register  
 :Sorted by Condition  
:Born in March  
 Emis No :19003  
 Patient Name:Mrs Lubomira Thoday  
 Address :Flat 13 Cabbage Parkway  
 Rhosneigr Surrey CR4 4JQ  
 TelNo :07796302002

Total Patients in Search  
**43**



**Mrs Lubomira Thoday**  
CHD1 - Patients on CHD Register  
 COPD14 - Patients on COPD Register

Your results will be displayed in the order you specified in Step 5.

Details for the highlighted patient will be shown in the 2 boxes below the list (in this example the patient on Row 1 is highlighted).

Notice PatientChase has identified that the patient is on two of the four registers searched – CHD and COPD.

Notice also the date of birth column confirms all the patients were born in March.

Clicking on any other patient will display their relevant registers.

Step 9 – Exporting to Word and Inserting to EMIS

The screenshot shows the PatientChase software interface. At the top, there is a menu bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu bar is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area is divided into two sections. On the left, there is a 'Library' pane with 'My Searches' and a search for 'March recall'. A context menu is open over the 'Results' icon, with the option 'Export to Word AND Insert into EMIS' highlighted. On the right, there is a table of search results with columns: 'DateIns', 'Conditions', 'CHD', 'STROK', 'COPD', 'ASTHMA', 'SurName', 'FirstName', and 'EmisN'. Below the table, there is a summary card for 'Mrs Lubo' showing search details and patient information.

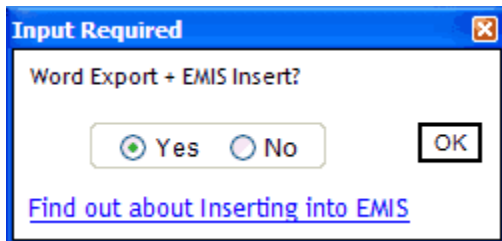
DateIns	Conditions	CHD	STROK	COPD	ASTHMA	SurName	FirstName	EmisN
1	CHD,COPD	CHD		COPD		Thoday	Lubomira	19003
2	COPD,ASTHMA			COPD	ASTHMA	Winter	Kerensa	6954
3	ASTHMA				ASTHMA	Edgell	Benoit	19342
4	ASTHMA				ASTHMA	Rafferty	Paola	25203
5	ASTHMA				ASTHMA	Sowter	Vicki	22712
6	CHD	CHD				Bennett	Annelize	24845
7	CHD	CHD				Taylor	Nicola	23748
8	CHD	CHD				Fox-Bregman	Kaye	22736
9	CHD	CHD				Thornton-Allen	Leza	21637
10	CHD	CHD				Irons	Antoinette	19350
11	COPD			COPD		Eskander	Shauna	2504
12	ASTHMA				ASTHMA	Wabali	Johanette	7829
13	CHD	CHD				Hullah	Jaimee	2120
14	CHD	CHD				Richings	Abraham	6588
15	ASTHMA				ASTHMA	Woogara	Cecile	25930
16	ASTHMA				ASTHMA	Lacey	Morag	25278
17	ASTHMA				ASTHMA	Thornton-Allen	Leza	24337
18	CHD	CHD				Nicholas	Melinda	24466
19	COPD			COPD		Kwan	Mercedes	21542
20	CHD	CHD				Glynn	Gwenda	12338
21	ASTHMA				ASTHMA	Nicklin	Stanislav	8264

**Search Summary:**  
 Date of Search: 07/12/2011  
 Search: :Register  
 :Sorted by Condition  
 :Born in March  
 Emis No :19003  
 Patient Name:Mrs Lubomira Thoday  
 Address :Flat 13 Cabbage Parkway  
 Rhosneigr Surrey CR4 4JQ  
 TelNo :07796302002

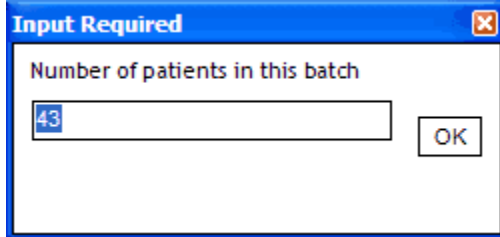
**Patient Summary:**  
 Mrs Lubo  
 CHD1 - Patients  
 COPD14 - Patie

Right click over the word 'Results' and select 'Export to Word AND Insert into EMIS'.

This process will create a mail merge (into Microsoft Word) of patient letters ready to print AND at the same time put a copy of each letter into the relevant patient medical records.



Click 'OK' to continue.

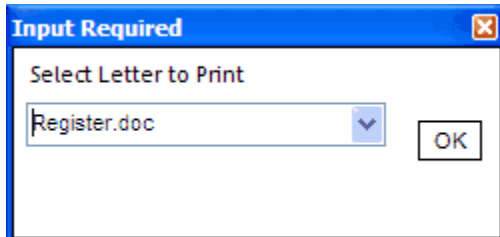


An 'Input Required' dialog box with a blue title bar and a close button. The text 'Number of patients in this batch' is displayed above a text input field containing the number '43'. To the right of the input field is an 'OK' button.

Decide how many patients you wish to invite at this time and type in the number.

(PatientChase will remember that it's sent out a first letter for that number of patients and whenever you decide to do a new batch, it will show how many patients are remaining).

Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Select Letter to Print' is displayed above a dropdown menu showing 'Register.doc'. To the right of the dropdown is an 'OK' button.

Now select the letter template you modified/created when setting PatientChase up. (See the 'How do I create my own letter template?' chapter).

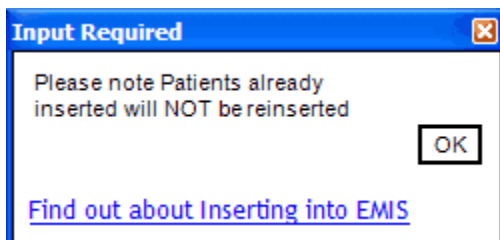
Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Choose Date of Insert' is displayed above a date dropdown menu showing '07 December 2011'. To the right of the dropdown is an 'OK' button. At the bottom of the dialog is a blue hyperlink: [Find out about Inserting into EMIS](#).

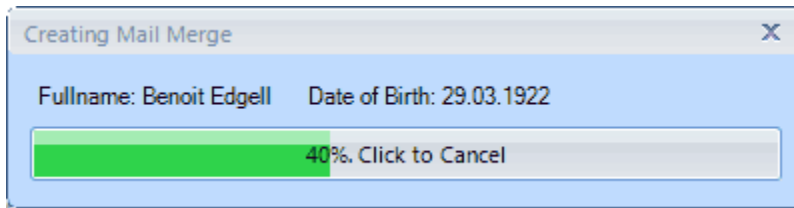
Select the date of insertion into EMIS using the calendar. The default is today's date.

Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Please note Patients already inserted will NOT be reinserted' is displayed. To the right of the text is an 'OK' button. At the bottom of the dialog is a blue hyperlink: [Find out about Inserting into EMIS](#).

Click OK.



PatientChase will now create the mail merge for you and at the same time insert copies of the letters into the patients' medical records.

## Step 10 – The completed mail merge.



Above is a sample letter once the mail merge is complete and Word has opened.

Each letter is completely personalised to each patient and only the conditions relevant to that particular patient appear on the letter.

An identical copy of the letter is stored as an attachment in the patient's notes.

Remember, the 'look and feel', wording and level of content is entirely down to you.

(See the 'How do I create my own letter template?' chapter to customise your own templates).