

Quick Reference Guide - Designing a QOF Patient Recall Letter Template

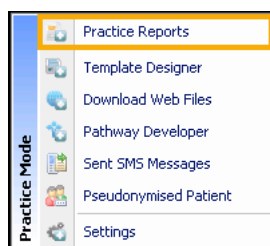
The first stage to recalling patients is to design your **Letter Template**. The **Vision+** Letter template tools are based on Microsoft Word mail merge.



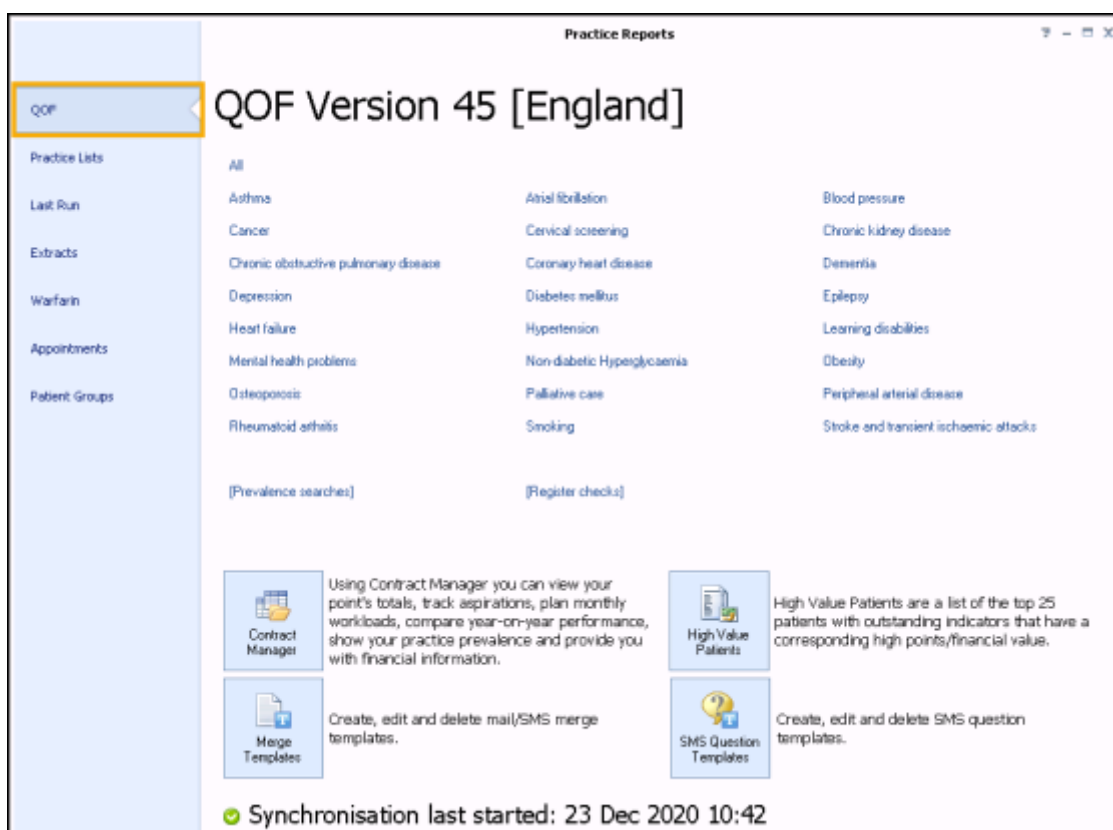
Training Tip - To access the **Vision+ Practice Reports**, you must not have a patient selected in **Consultation Manager** else the patient-specific menu displays.

To design a QOF/QAIF recall template:

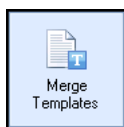
1. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:



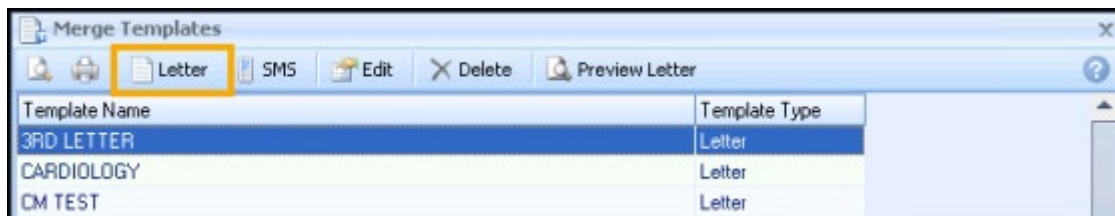
2. From Practice Reports, select **QOF/QAIF**:



3. Select **Merge Templates**



4. From the **Merge Templates** toolbar, select **Letter**

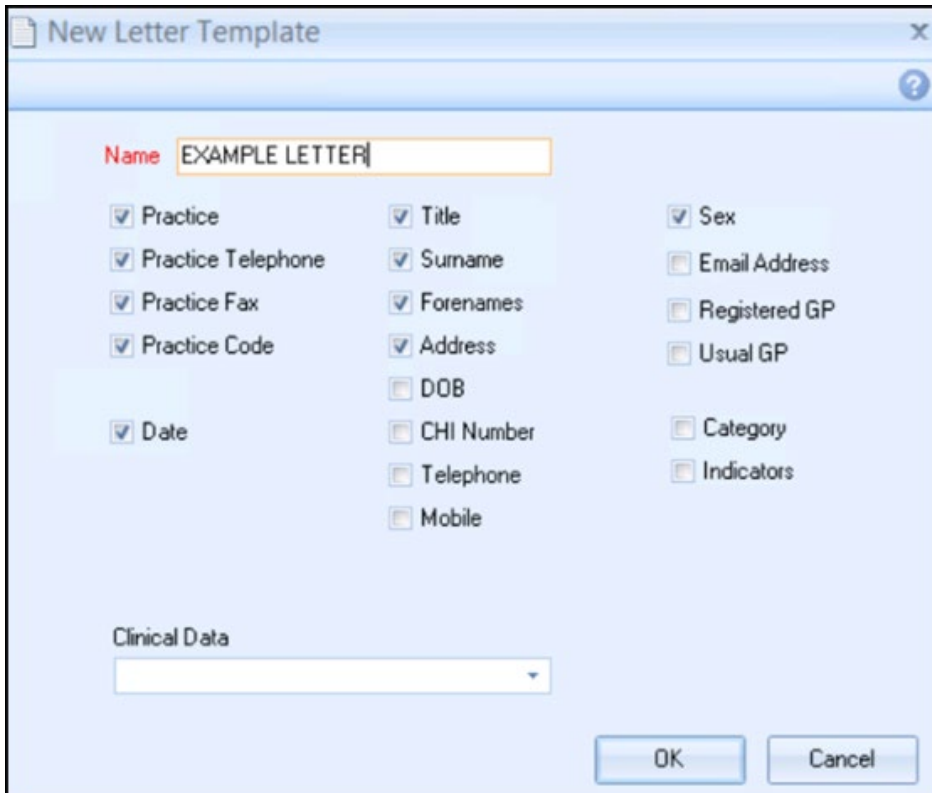


5. **New Letter Template** displays, in **Name** enter a descriptive title for the new template.



Training Tip - For QOF/QAIF Templates you may want to include the word **QOF** or **QAIF** in the name so you can easily distinguish between QOF/QAIF and non-QOF templates.

6. Tick against each item of information from the patients records you would like to merge into the letter, or untick any items you do not require:

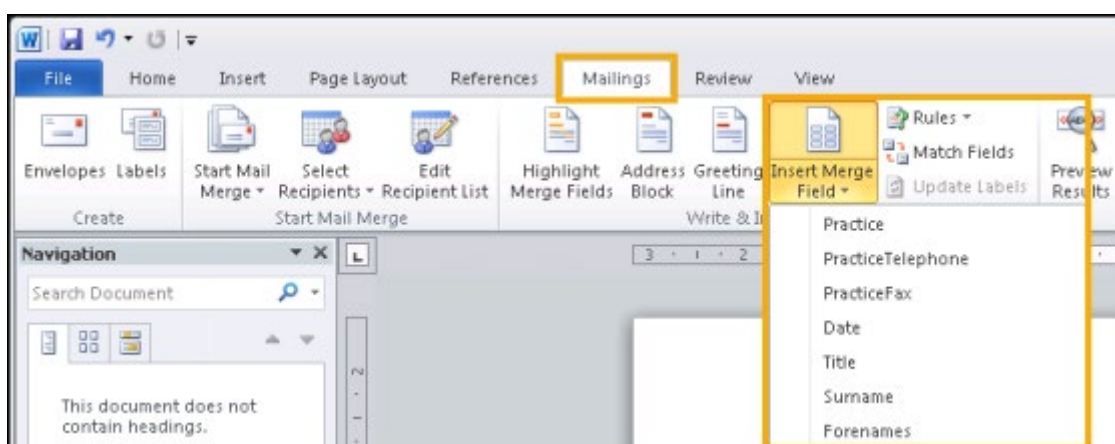



Note - For Practices in Scotland the **NHS Number** merge field is replaced with **CHI Number** and for practices in Northern Ireland **H+C Number** is shown.

7. If applicable, select the Clinical Data to be included in the mail merge. When clinical data is selected, the merge fields available in the extract are made available to Word. This is an extremely useful way of getting patient data into letter form.
8. Select **OK** and Microsoft Word opens up in a new window with a basic template layout.
9. Use Microsoft Word to make any changes to the template layout you require.

Any mail merge fields display with a << >> around them, you can move them around or copy them to other areas of the document as required.

Alternatively, you can insert additional merge fields from within Word by selecting **Mailings - Insert Merge Field**:



You can use all of the familiar word processing features in Microsoft Word to make the layout of the letter more attractive.

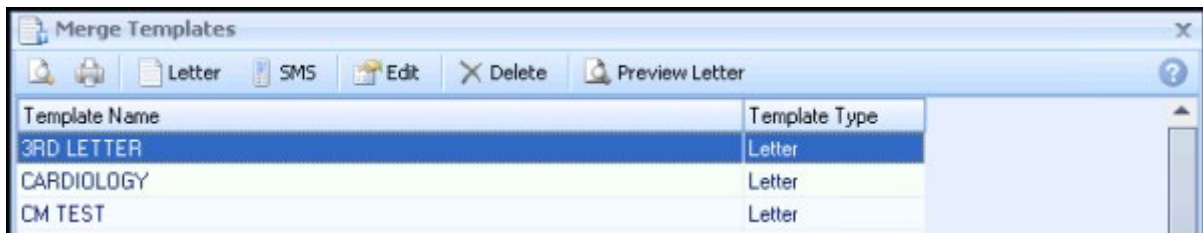
i Important - We highly recommend you add a disclaimer to any reports or letters you produce from your Vision system, for example, 'This document may contain sensitive or confidential data, please treat accordingly'.

10. Once you have finished, from Microsoft Word, select **Save** .
11. **Close** Microsoft Word.

The new Letter Template displays in the list on the **Letter Templates** screen.

Printing, Editing or Deleting a Template

The following options are available in the **Merge Templates** screen:



- **Print Preview** - This option allows you to preview the template list.
- **Print** - Allows you to print the template list.
- **Letter** - Select to create a letter template.
- **SMS** - Select to create an SMS template.
- **Edit** - Enables you to update the template.
- **Delete** - Delete the template, you are prompted to confirm the deletion.
- **Preview Letter** - Provides a preview of the template letter with merged patient details.