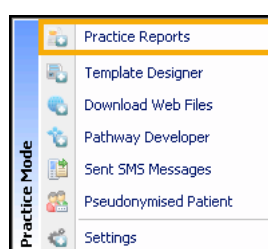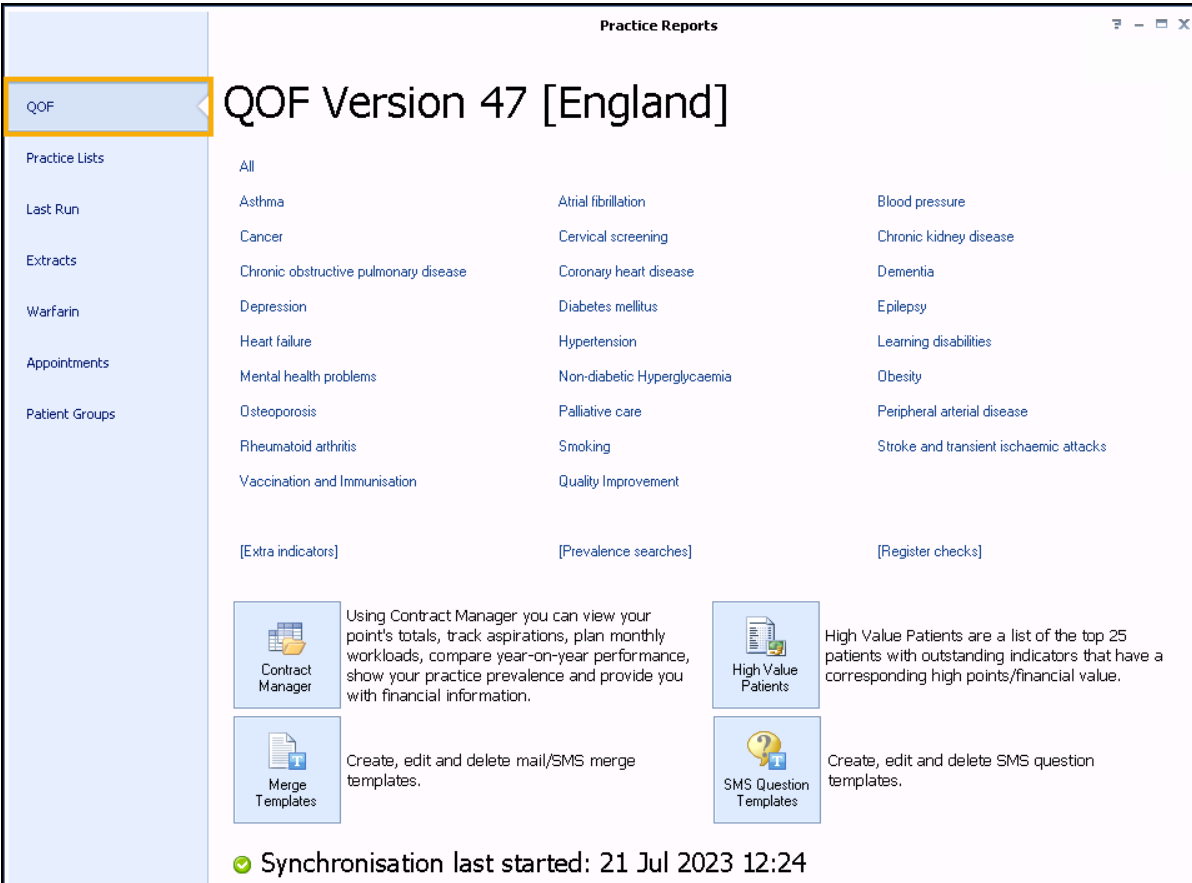# Quick Reference Guide - Recalling Patients by Email

Creating an Email Template

Before you send emails to patients you must set up an email template, to do this:

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

2. **Vision+ Practice Reports** opens by default on the QOF/QAIF page:

3. Select **Merge Templates** .
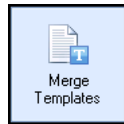
4. The **Merge Templates** screen displays, select **Email** to create a new email template:
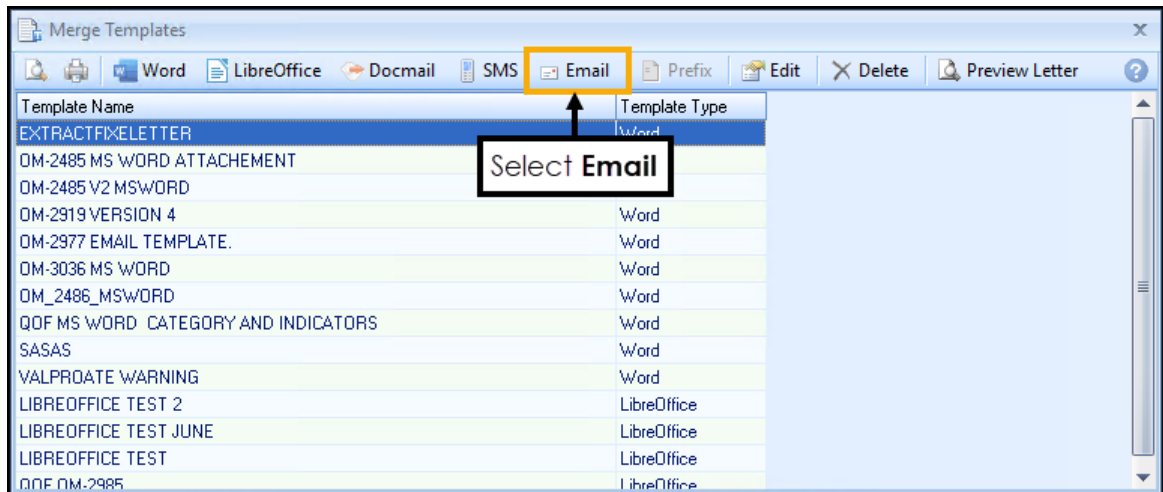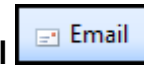
💡 **Training Tip** - You can also **Edit** or **Delete** a template from the **Merge Templates** screen, see Editing or Deleting an Email Template in the **Vision+ Help Centre** for details.

---

5. The **New Email Template** screen displays:

Complete as follows:

- **Name** - Type a name so that you can distinguish your template type in the **Merge Templates** screen. The patient does not see this text when they receive the email.

- **Description** - Add the email content. This is what is included in the email to your patient(s).

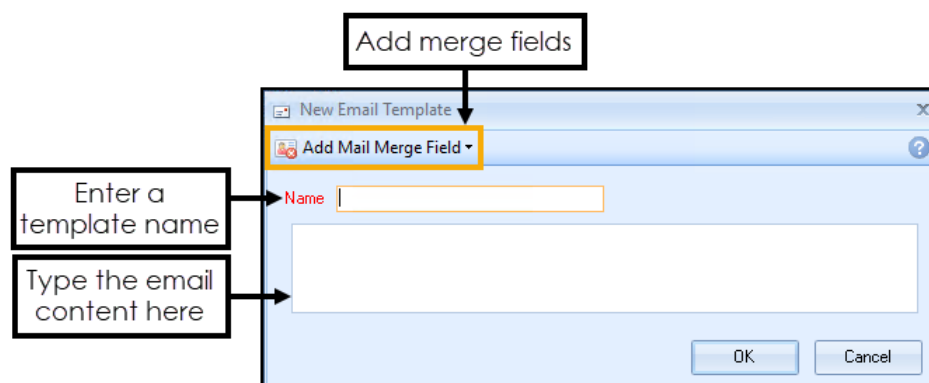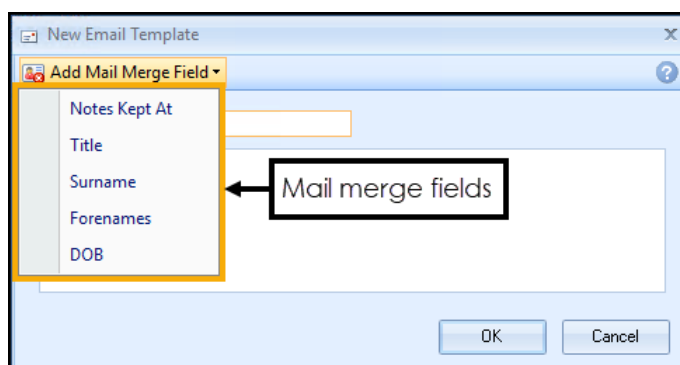- **Add Mail Merge Field** - The following merge fields are available:

- **Notes Kept At**
- **Title**
- **Surname**
- **Forenames**
- **DOB**

Training Tip - Set the email subject line and signature in the **Settings** screen, see Settings - Email in the **Vision+ Help Centre** for details.

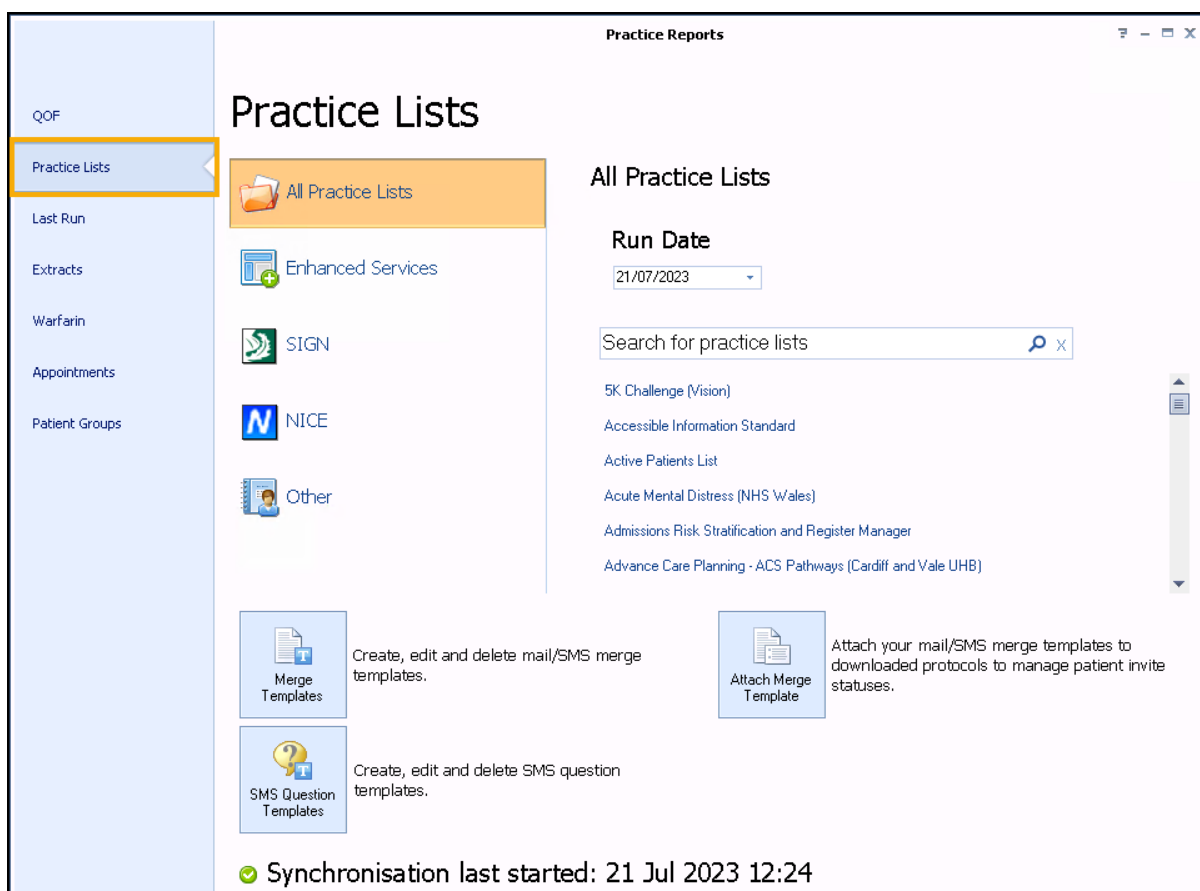6. Select **OK** to save the email template to the **Merge Templates** list.

7. Select **Close** [X] to close the **Merge Templates** screen.

Attaching an Email Template to a Vision+ Practice List
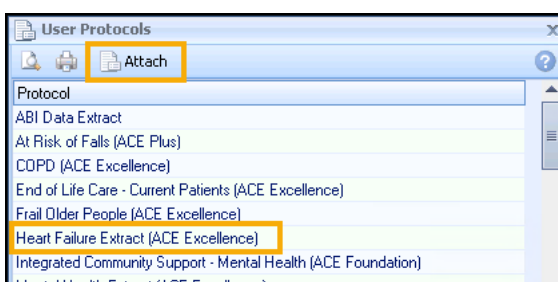
To use email templates in **Vision+**, for example, Seasonal Flu Vaccination Programme, that are downloaded from **Download Web Files**, you must attach the required email template to the relevant **Vision+** practice list. This process is the same as attaching letters and SMS templates.

✎ **Note** - You do not need to do this for mail merging **Patient Groups** or QOF/QAIF pathways.

1. From **Practice Reports**, select **Practice Lists**:
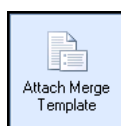
2. Select **Attach Merge Template** .

3. Next, from the **User Protocols** screen select the **Vision+** pathway you want to apply the email template to and select **Attach** :

4. The **Letter Templates** screen displays. Select **Email** [Email]:
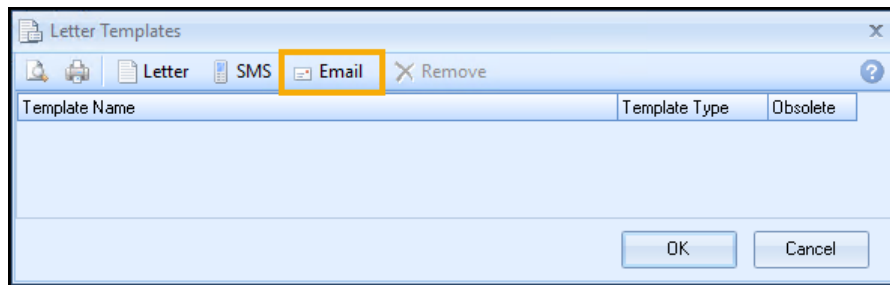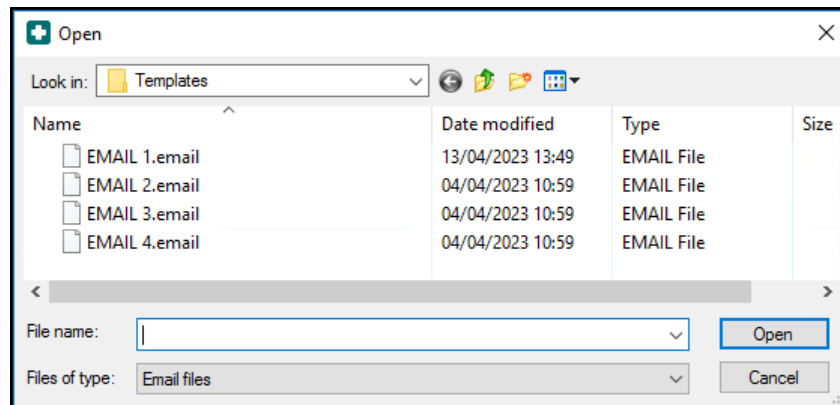

5. Select the email template, you want to attach to the pathway, from the list provided and then select **Open**:

![pencil icon] **Note** - This list only displays email templates as defined by the file type.

6. The email template is now added to the **Letter Templates** screen for the selected **Vision+** pathway:
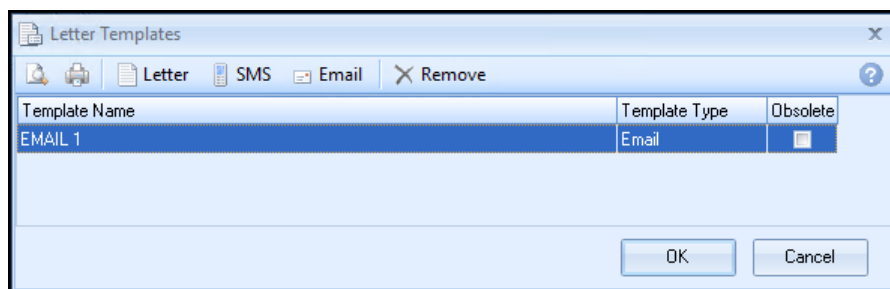
7. Select **OK** to close. You can now select the email template when sending an email for this **Vision+** pathway.

![pencil icon] **Note** - You must do this for each new email template you create and each new/updated **Vision+** practice list.

Recalling Patients by Email

You can send a recall email to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF/QAIF or enhanced areas.

To recall patients by email:

1. **Practice Reports** opens by default on the QOF/QAIF page but you can select any report. Select the required report to run it:
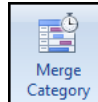

2. When you select a Practice or QOF/QAIF List '*Do you want to run this practice list now for the report date dd/mm/yyyy, or schedule it to run in the next 24 hours?*' displays:
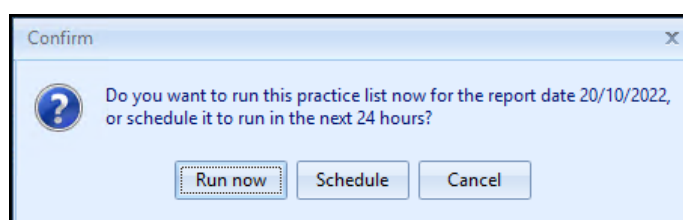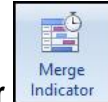

To run a report for call and recall invite purposes you must select **Run now**. The report screen displays with the progress bar as normal.

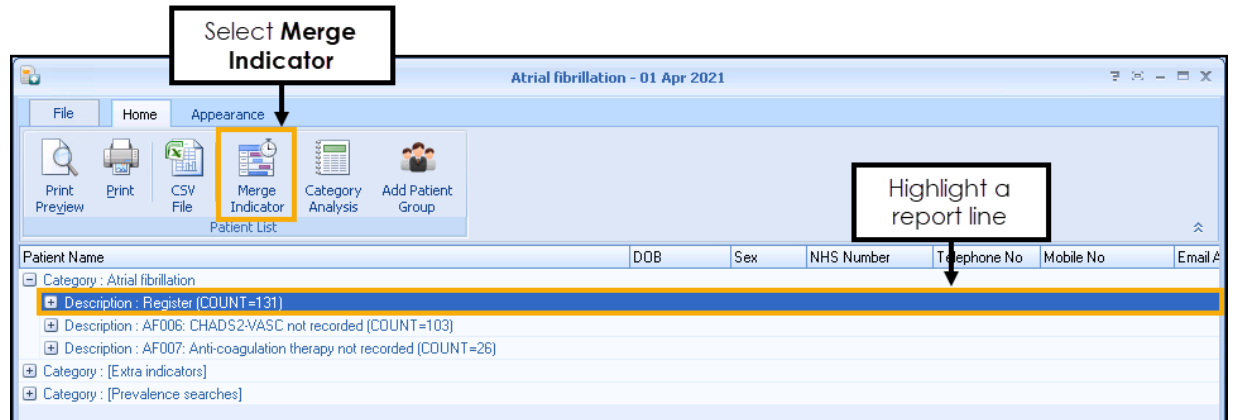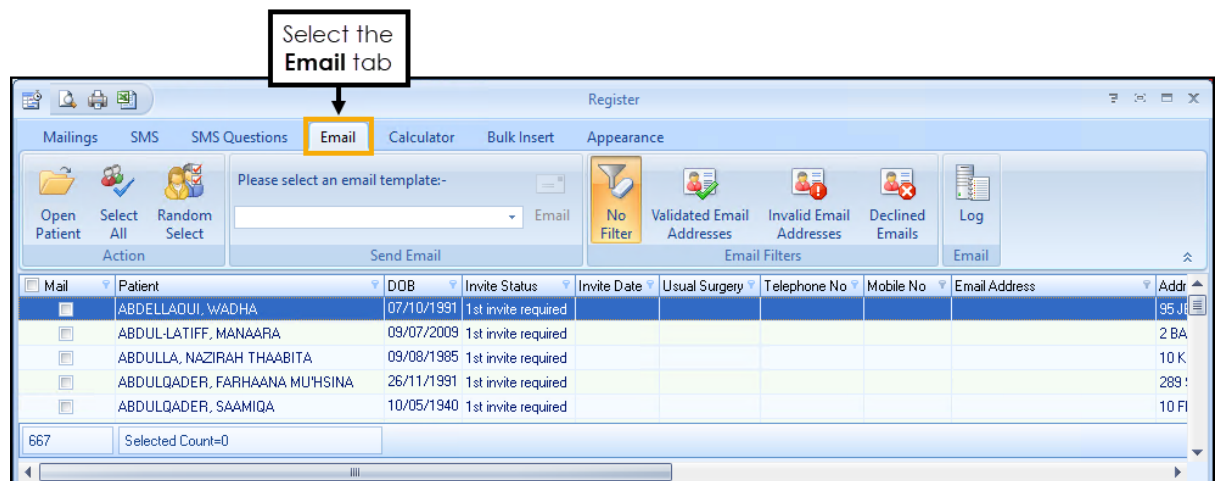3. Highlight a cohort line of patients that you want to send an email to and select either **Merge Category** or **Merge Indicator** depending on your selection:
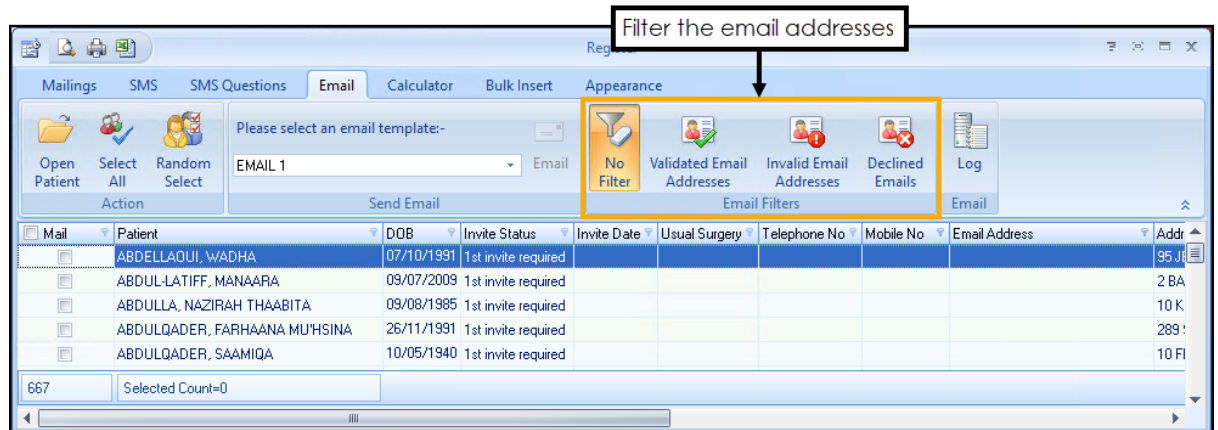

4. The **Mailings** screen displays, select the **Email** tab:

5. Filter the email addresses if required:

Filter the email addresses

You can filter by:

- **No Filter** - Select to view all patients.

- **Validated Email Addresses** - Select to view patients with a validated email address.

- **Invalid Email Addresses** - Select to view patients with invalid email addresses.

- **Declined Emails** - Select to view patients that have declined contact by email. This is done by adding the clinical code **9Ndy.00** Declined consent for communication by email (Read) or **835231000000104** Declined consent for communication by email (finding) (SNOMED) to the patient record.

6. Select the patients that you want to recall:

Select all patients
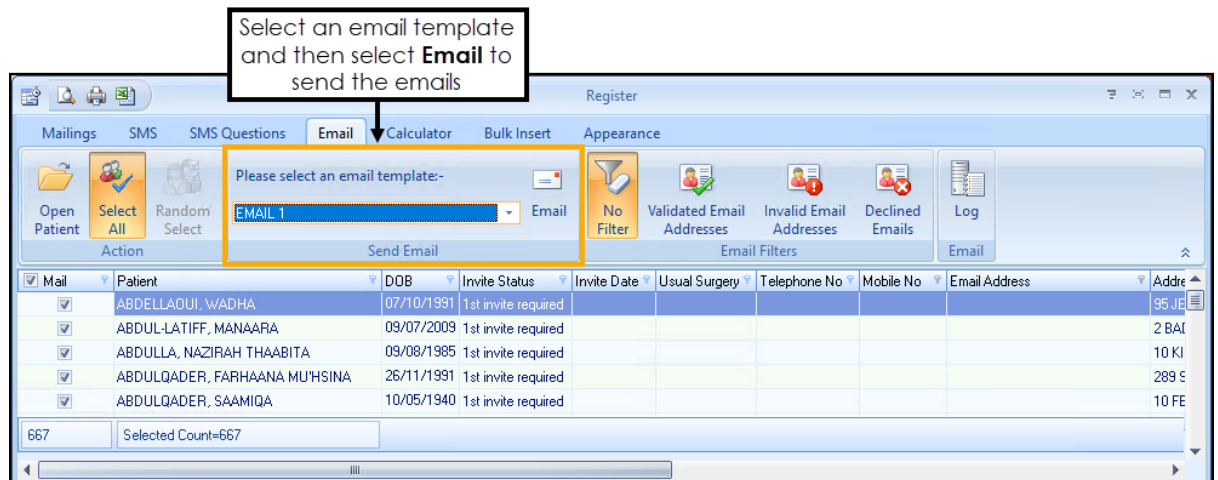
Select individual patients
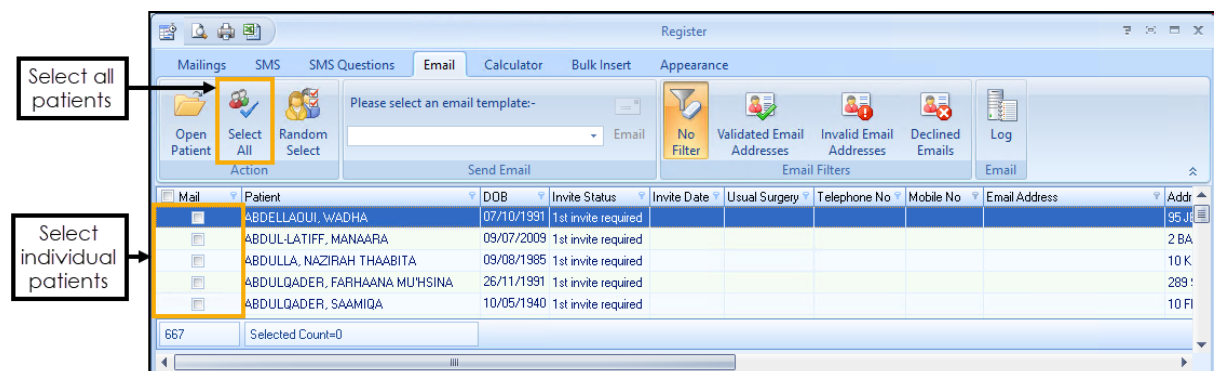
💡 **Training Tip** - If you want to select or clear all patient selections, use **Select All** from the toolbar, this is useful for managing larger lists.

7. From **Please select an email template** on the toolbar, select the required template from the available list and then select **Email** :

8. The email details automatically save in the patient's record along with the relevant clinical code **9N3C.00** (Read)/**401271004** (SNOMED CT) as a history entry:

The **Invite Date**, **Invite Count**, **Next Due Date** and **Last Invite Type** columns update accordingly.

See also Settings - Email and Email Consent in the **Vision+ Help Centre**.