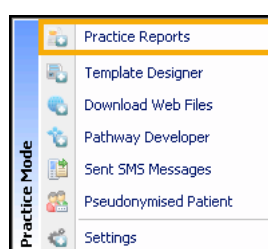


# Quick Reference Guide - Recalling Patients by Email

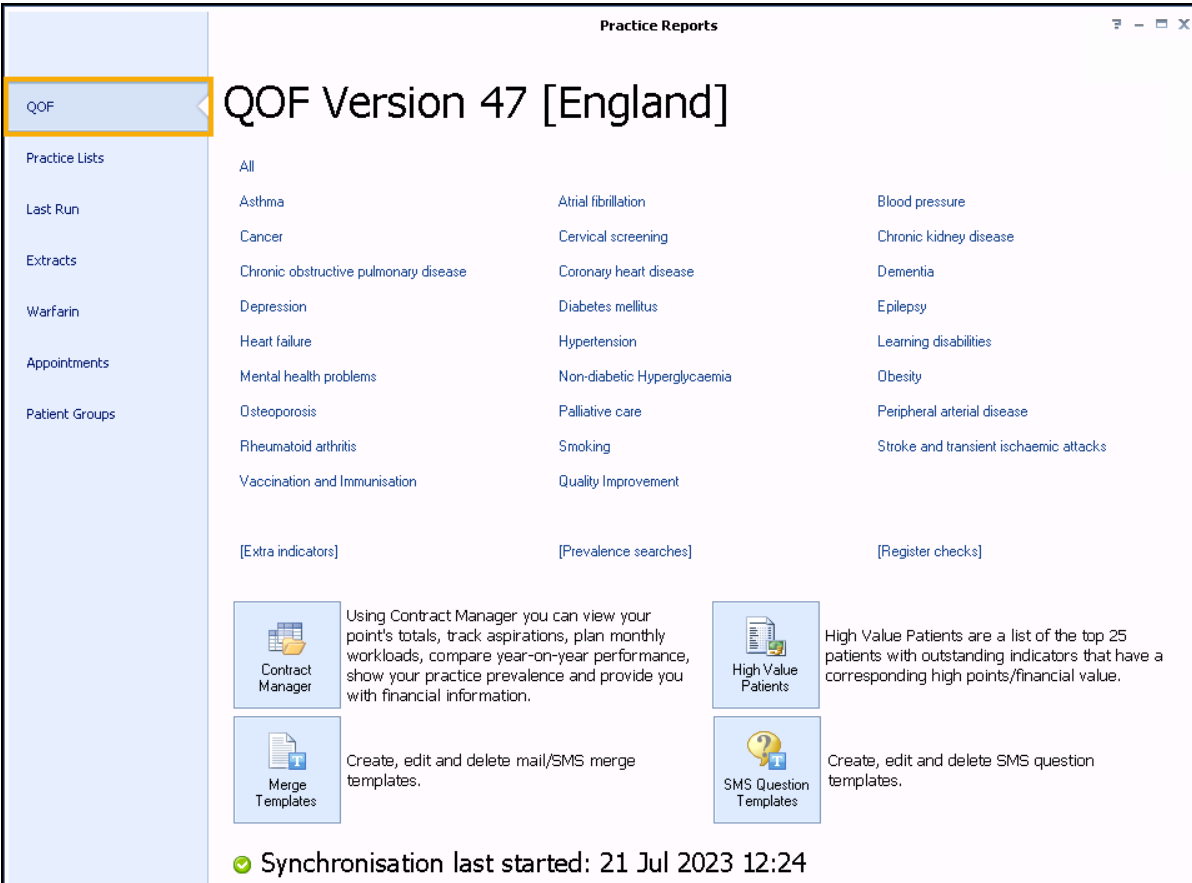
## Creating an Email Template

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:



**Practice Reports**

QOF

QOF Version 47 [England]

Practice Lists

Last Run

Extracts

Warfarin

Appointments

Patient Groups

All

Asthma

Cancer

Chronic obstructive pulmonary disease

Depression

Heart failure

Mental health problems

Osteoporosis

Rheumatoid arthritis

Vaccination and Immunisation

Atrial fibrillation

Cervical screening

Coronary heart disease

Diabetes mellitus

Hypertension

Non-diabetic Hyperglycaemia

Palliative care

Smoking

Quality Improvement

Blood pressure

Chronic kidney disease

Dementia

Epilepsy

Learning disabilities

Obesity

Peripheral arterial disease

Stroke and transient ischaemic attacks

[Extra indicators] [Prevalence searches] [Register checks]

**Contract Manager**  
Using Contract Manager you can view your point's totals, track aspirations, plan monthly workloads, compare year-on-year performance, show your practice prevalence and provide you with financial information.

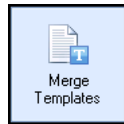
**High Value Patients**  
High Value Patients are a list of the top 25 patients with outstanding indicators that have a corresponding high points/financial value.

**Merge Templates**  
Create, edit and delete mail/SMS merge templates.

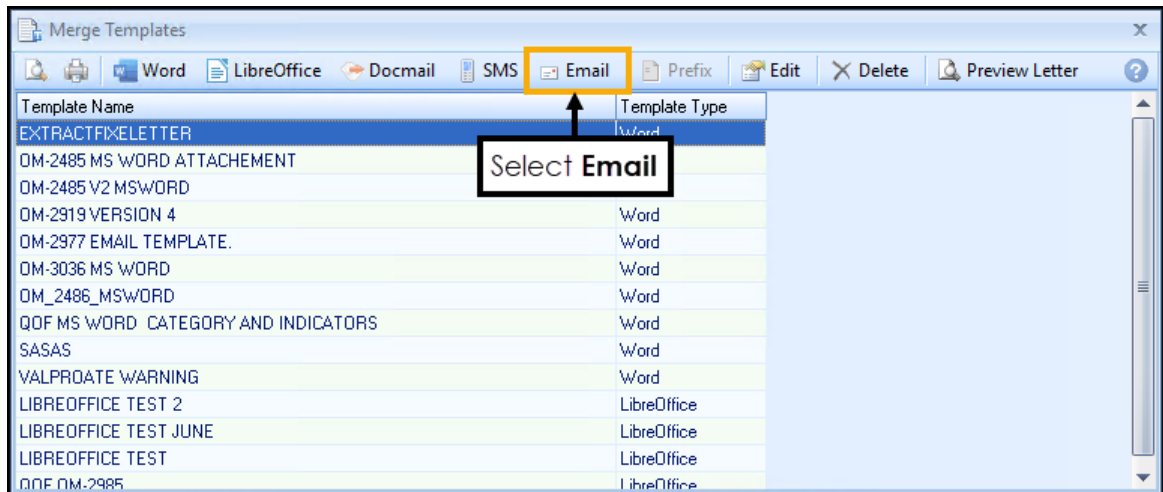
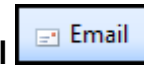
**SMS Question Templates**  
Create, edit and delete SMS question templates.

✓ Synchronisation last started: 21 Jul 2023 12:24

3. Select **Merge Templates**

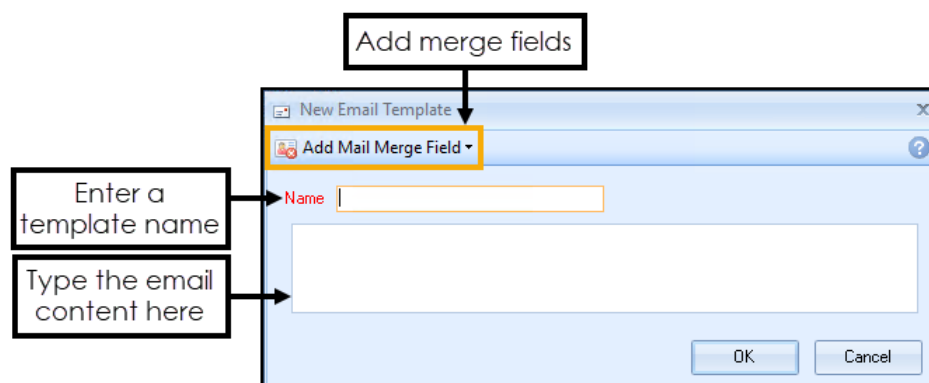


4. The **Merge Templates** screen displays, select **Email** to create a new email template:



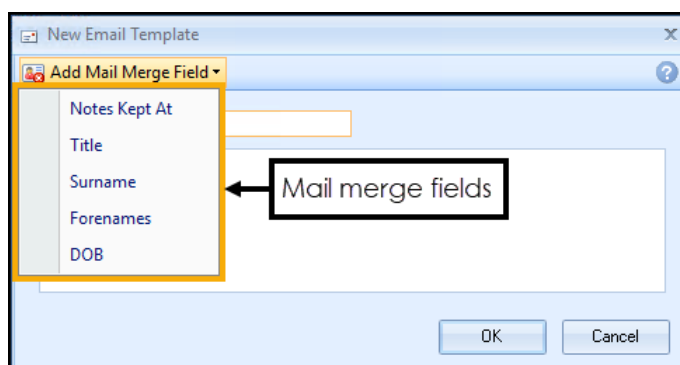
**Training Tip** - You can also **Edit** or **Delete** a template from the **Merge Templates** screen, see [Editing or Deleting an Email Template](#) in the **Vision+ Help Centre** for details.

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.

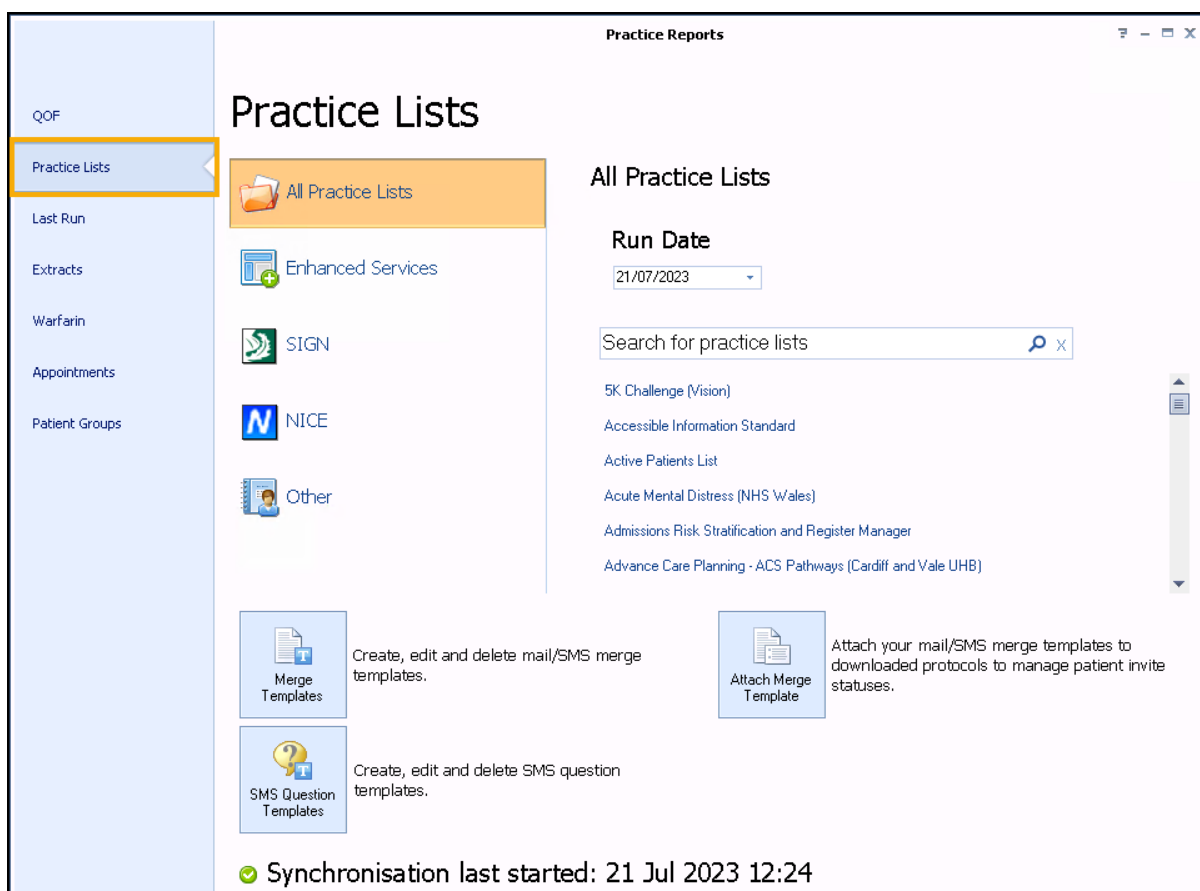
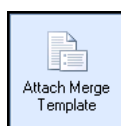
7. Select **Close**  to close the **Merge Templates** screen.

## Attaching an Email Template to a Vision+ Practice List

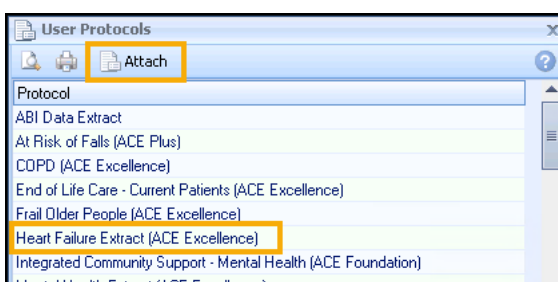
To use email templates in **Vision+**, for example, Seasonal Flu Vaccination Programme, that are downloaded from **Download Web Files**, you must attach the required email template to the relevant **Vision+** practice list. This process is the same as attaching letters and SMS templates.


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

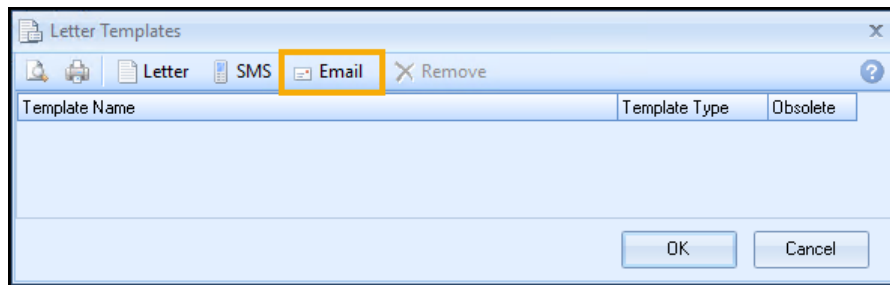
1. From **Practice Reports**, select **Practice Lists**:

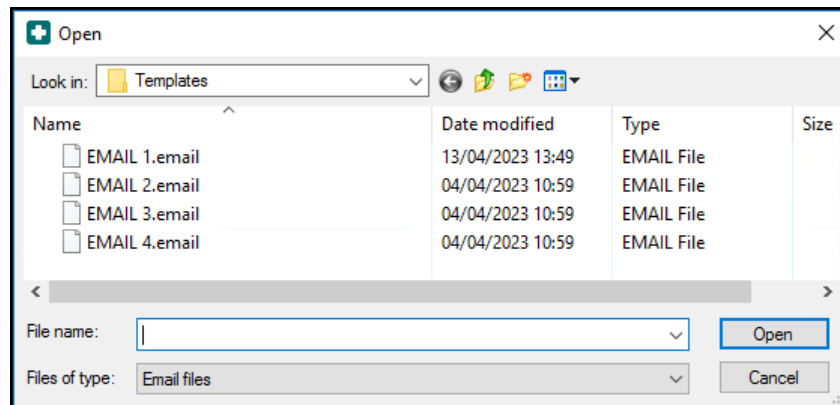
2. Select **Attach Merge Template**
3. Next, from the **User Protocols** screen select the **Vision+** pathway you want to apply the email template to and select **Attach**



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

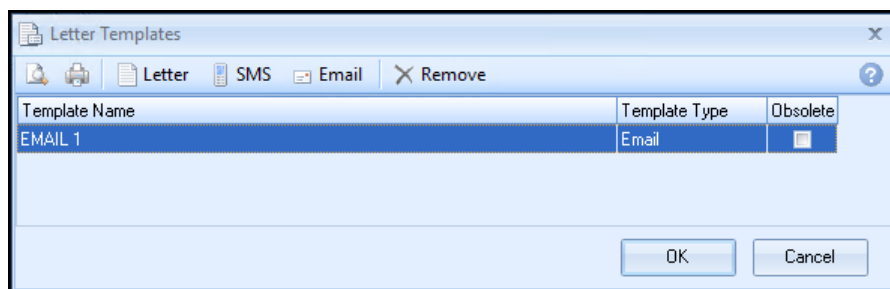


5. Select the email template, you want to attach to the pathway, from the list provided and then select **Open**:




 **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.

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

## Recalling Patients by Email

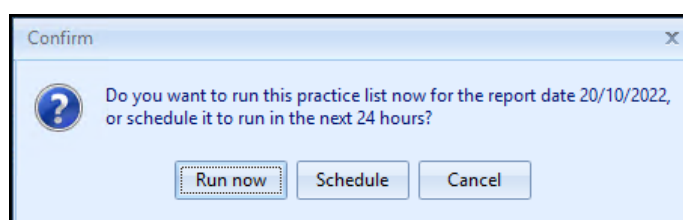
You can send a recall email to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF/QAIF or enhanced areas.

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:



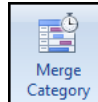
2. When you select a Practice or QOF/QAIF List 'Do you want to run this practice list now for the report date dd/mm/yyyy, or schedule it to run in the next 24 hours?' displays:



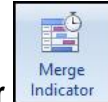
To run a report for call and recall invite purposes you must select **Run now**. The report screen displays with the progress bar as normal.

- Highlight a cohort line of patients that you want to send an email to

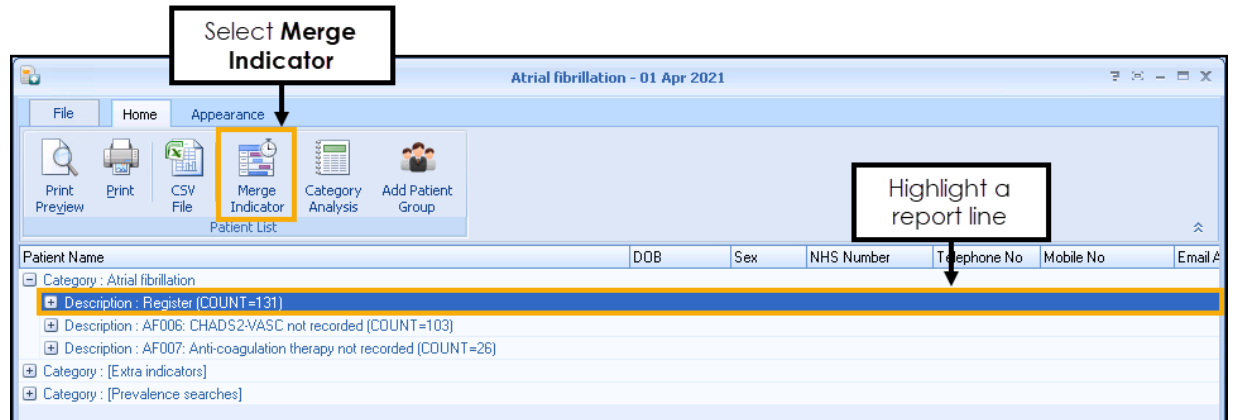
and select either **Merge Category**



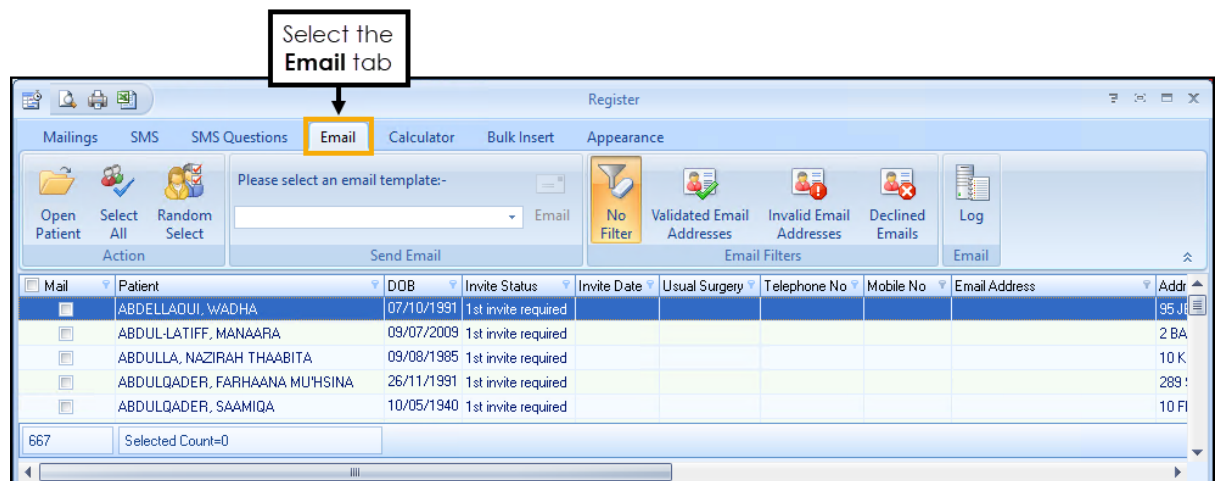
or **Merge Indicator**



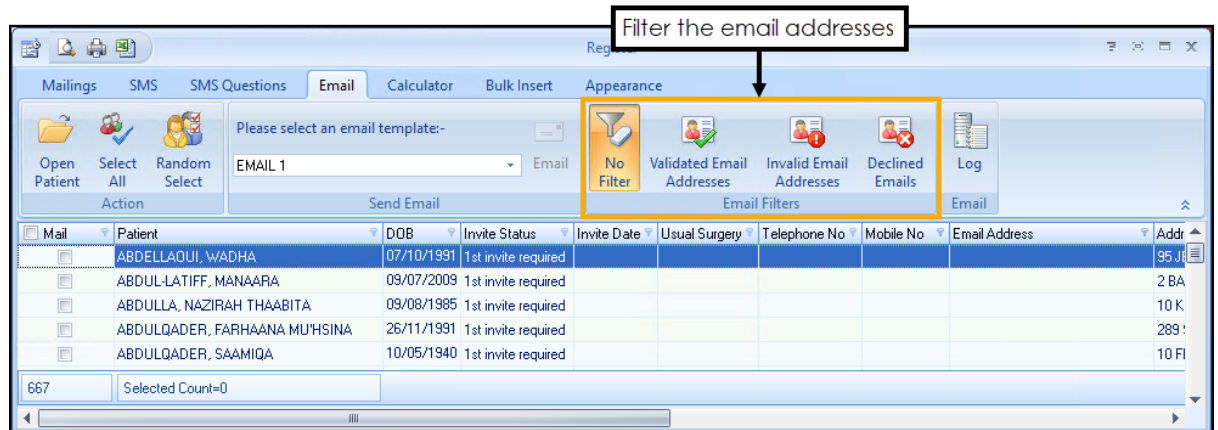
depending on your selection:



- The **Mailings** screen displays, select the **Email** tab:



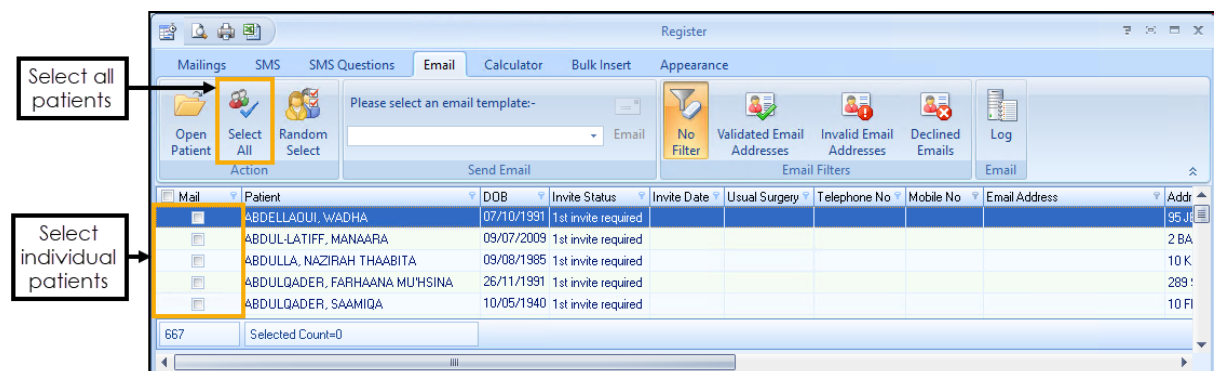
5. Filter the email addresses if required:



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:

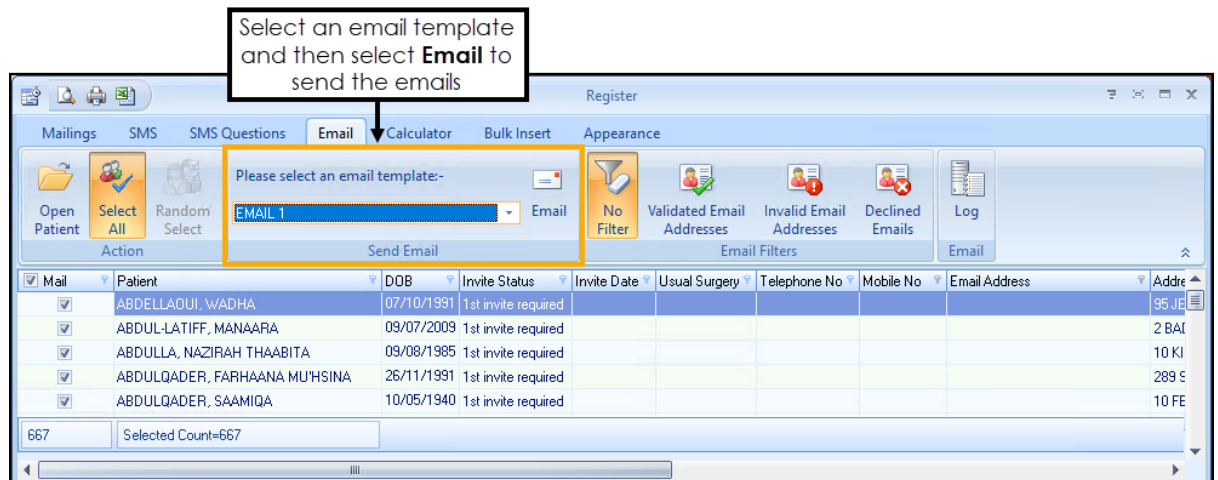


 **Training Tip** - If you want to select or clear all patient selections, use **Select All** from the toolbar, this is useful for managing larger lists.




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:

Date	Description	Clinician
14/05/23	 Email sent to patient Hello thanks for being a patient here Miss Janis Aaron {Active Patients List}	RHW/H

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**.