

Recreating and Sending Vision 3 Patient Letters in Vision+

Cegedim Healthcare Solutions are aware of an issue when printing patient recalls using patient groups in **Vision 3**. In the meantime, you can migrate your existing mail merge templates into **Vision+** and run the recall from there.

Migrating Vision 3 Word Templates to Vision+

You can create new templates in **Vision+**, however to use a **Vision 3** template in **Vision+** you need to do the following:

 Open File Explorer on your computer and copy the required Vision 3 templates from P:\WORDPROC\TEMPLATE to P:\Visionplus\'PracticeNationalCode'\Letters\Templates.



2. The merge fields on the template require updating to match the merge fields used in **Vision+**, to do this, with no patient selected in **Vision 3**,

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



3. Vision+ Practice Reports opens by default on the QOF/QAIF screen, select Merge Templates.







- 4. The Merge Templates screen displays, select the Template Name for the copied template and select Edit.
- 5. The Word document opens. From the **Mailings** menu, select **Highlight Merge Fields** to highlight existing merge fields.



6. Highlight each merge field individually and replace with a new merge field listed in **Insert Merge Field**.



Important - Make sure you have replaced all **Vision 3** merge fields in the document with new ones from the **Insert Merge Field** list. Any **Vision 3** merge fields left can cause the merge process to fail.

7. Save and Close the Word document.

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Select to Save the Edit Re Lab new template	Highlight Merge Fields Block Line Field ~ Budy Labels	ABC Preview Results Check for Errors ABC F M Select to Close F M Select to Close
Create Start Man Werge	Write & Insert Fields	Preview Results Finish



Viewing Vision 3 Patient Groups in Vision+

1. From Vision+ Practice Reports, select Patient Groups.

		Practice Reports	7 - □ X
QOF	Patient Groups		
Practice Lists	🏤 User	User	
Last Run		Search for patient groups	
Extracts		Active Patients Aged 16 And Over	
Warfarin		Active Patients Aged 16 And Over Who Have Consente	
Appointments		Active Patients Dead Read Code Or No Address Af001 Register: The Contractor Can Produce A Regis	=
Patient Groups		Alfred Winter	
		All Active Patients	
		All Ages Both Sexes	•
		>> S	how More

2. The **Patient Groups** screen displays all patient groups. Search for and select the required patient group.

Training Tip - Vision+ Patient Groups display the Vision 3 Description and not the Name.

3. The **Patient Group** screen displays, select expand + to view the patient list.

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	File Home	Appearance								
	Print Print Preview Pat	CSV Merge File Patient Group								*
	Patient Name				DOB	Sex	NHS Number	Telephone No	Mobile No	E
Select expand + to view	Category : Patient G	iroup All Patients Between 4	0-75							
the patient list	Description : All	Patients Between 40-75 (CC	JUNT=4607)							



Sending Letters to a Patient Group

1. Select the patient list on the Patient List screen and select Merge Patient

Group Patient Group from	n the toolbar.			
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File Home Appearance				
Print Print CSV Preview Patient List	Highlight a report line and select Merge Patient Group			*
Patient Name	♀ DOB	👻 Sex 🔗 NHS Number	📍 Telephone No 👻 Mobile No	₽ E
Lategory: Patient Group All Patients Between 40-75 All Patients Between 40-75 : (COUNT=4608)				

2. The **Merge** screen displays the same list of patients that displays on the **Patient Group** screen, but allows you to perform additional tasks on the data. You can drag each column to a different position to help view the data.



Sort the data into a different order by clicking on the column headers, or you can use **Filter** to show specific patients, such as those at a branch surgery. When a filter is applied to the data, the filter criteria displays at the bottom of the screen $\times \bigcirc$ (invite Status = 1st invite required). To remove the filter select \boxtimes alongside it. The number of patients in the list displays in the bottom left corner of the screen.

 To send a letter to the patients, select the patients required, select the Mail checkbox for each patient that you want to recall or select Select All.

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



4. Next, from the Start Mail Merge section on the toolbar, select the

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	Mail

required template from the drop-down list and then select Mail

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- 5. The recall letters open in a single document, ready to be printed. Visionalso adds an appropriate Clinical term on the patient's medical record to help manage the recall status.
- 6. Print the recall letters and select **Update** to update the invite status.

Confirm	n	х
?	Your mail merge letter should have now been created. Please ensure you have printed your letter before updating the invite status.	
	(Update) Cancel	

7. The mail merge letters automatically save in the patient's record along with the relevant clinical code as a history entry.

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