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:

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

Training Tip - Make sure the files are saved as .doc or .docx.

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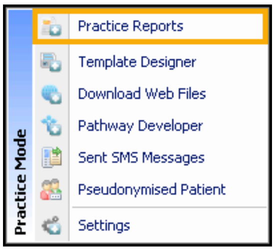
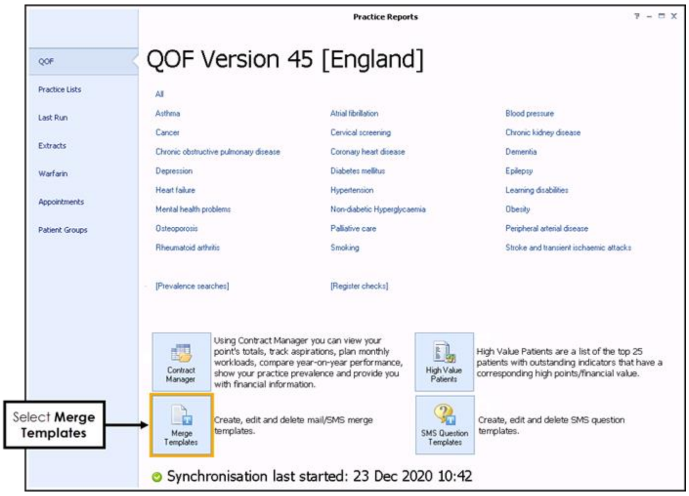
2. The merge fields on the template require updating to match the merge fields used in **Vision+**, to do this, with no patient selected in **Vision 3**,

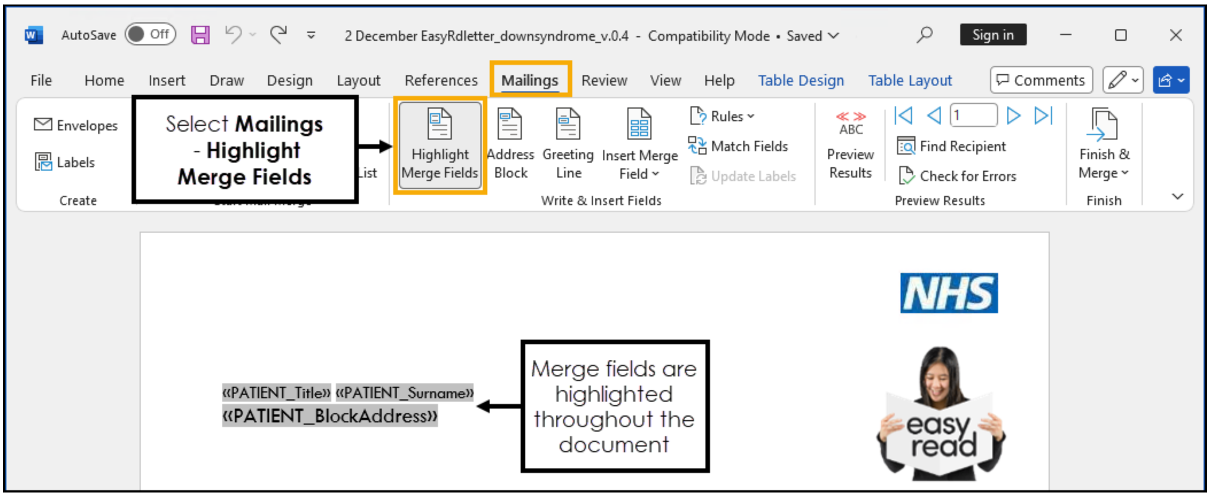
   From the **Windows Notification Area**, right-click **Vision+** and select **Practice Reports**.



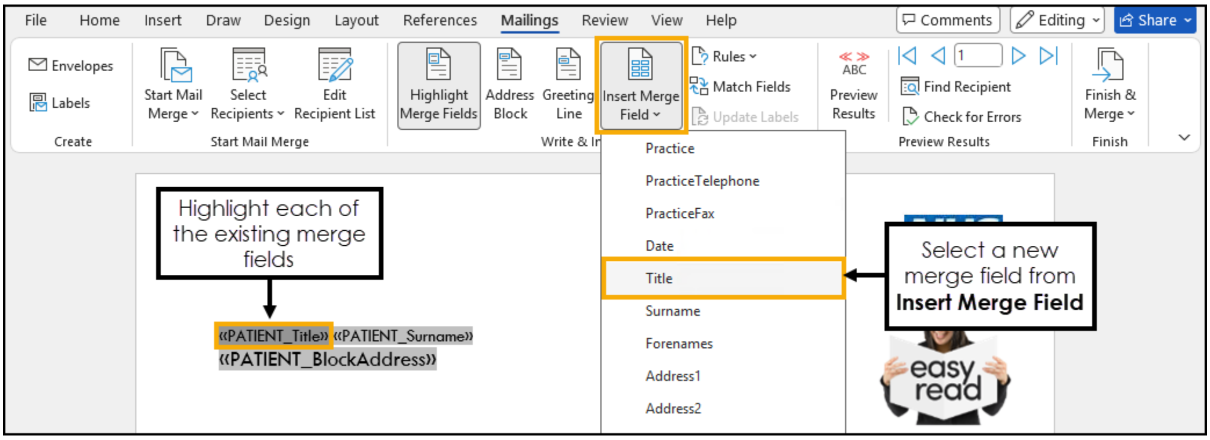
3. **Vision+ Practice Reports** opens by default on the QOF/QAIF screen, select **Merge Templates**.



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.

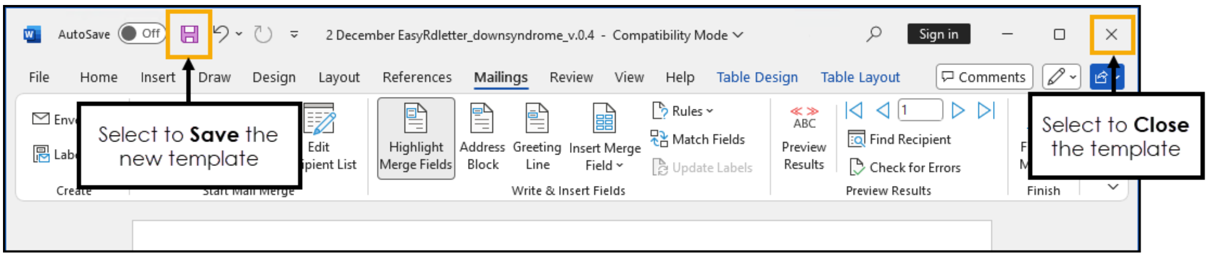


6. Highlight each merge field individually and replace with a new merge field listed in **Insert Merge Field**.



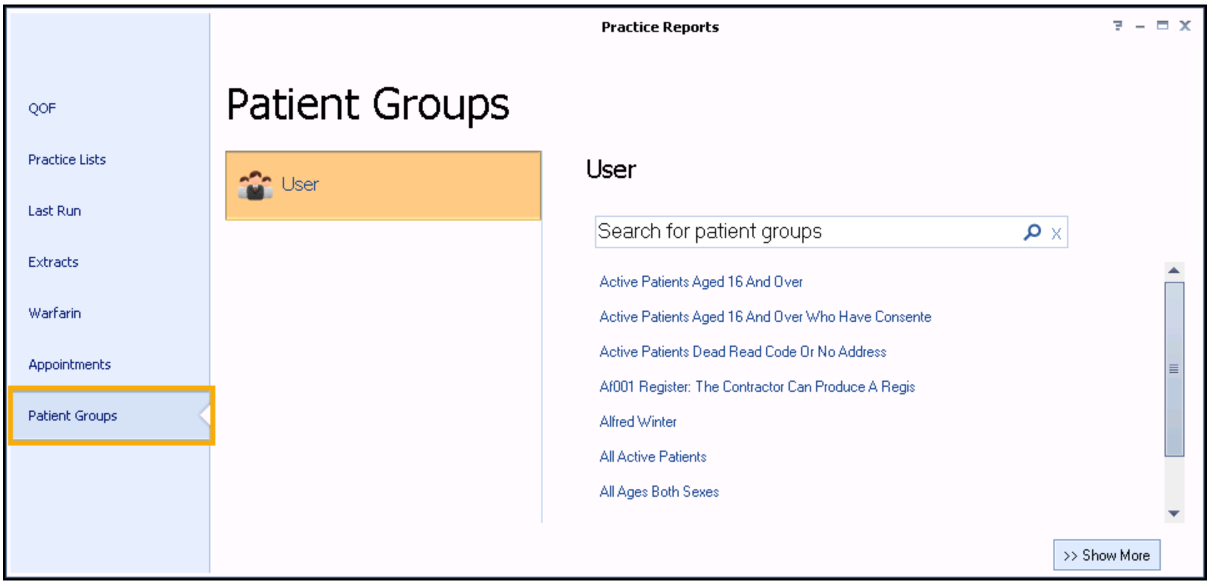
Important - Make sure you have replaced all **Vision 3** merge fields in the document with new ones from the **Insert Merge Field** list. Any **Vision 3** merge fields left can cause the merge process to fail.

7. **Save** and **Close** the Word document.



Viewing Vision 3 Patient Groups in Vision+

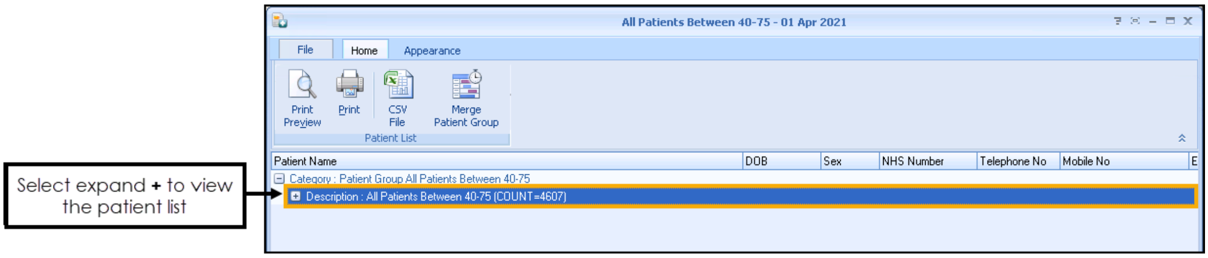
1. From **Vision+ Practice Reports**, select **Patient Groups**.



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**.

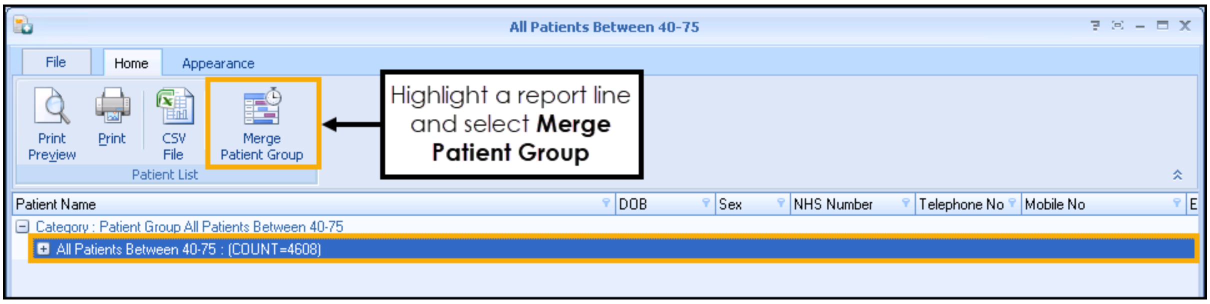
3. The **Patient Group** screen displays, select expand **+** to view the patient list.



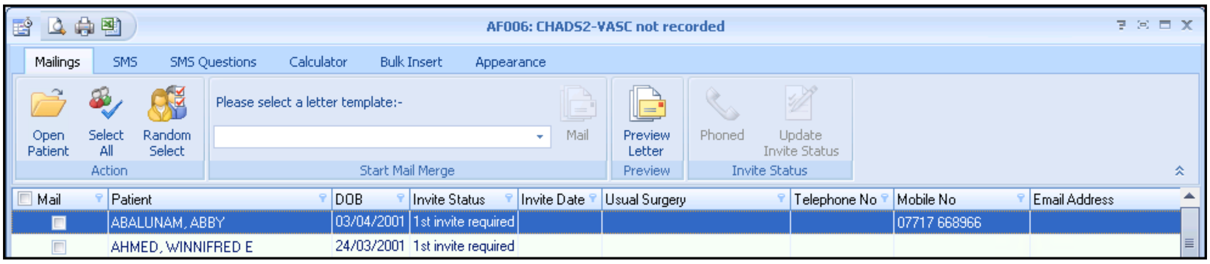
Sending Letters to a Patient Group

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

 from the toolbar.

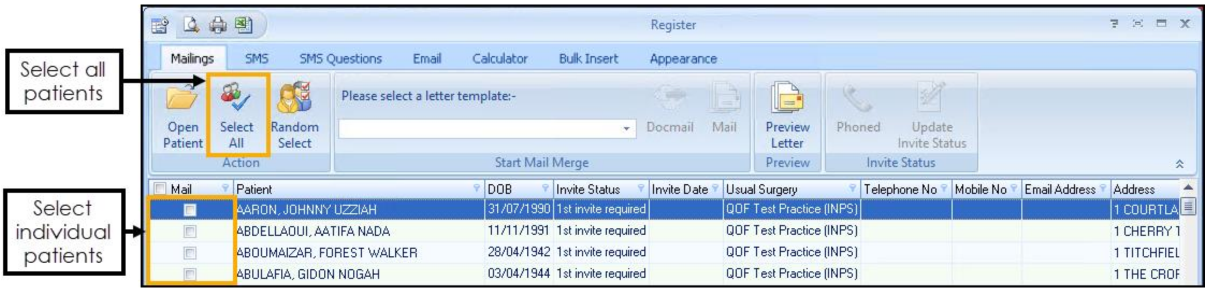


2. The **Merge** screen displays the same list of patients that displays on the **Patient Group** screen, but allows you to perform additional tasks on the data. You can drag each column to a different position to help view the data.



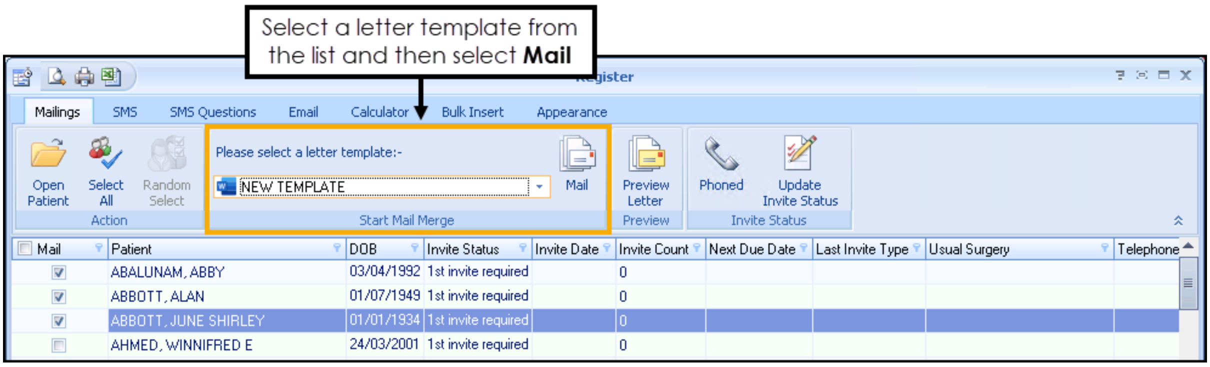
Sort the data into a different order by clicking on the column headers, or you can use **Filter** to show specific patients, such as those at a branch surgery. When a filter is applied to the data, the filter criteria displays at the bottom of the screen (Invite Status = 1st invite required). To remove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

3. 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**.



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



5. The recall letters open in a single document, ready to be printed. Vision+ also 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.

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