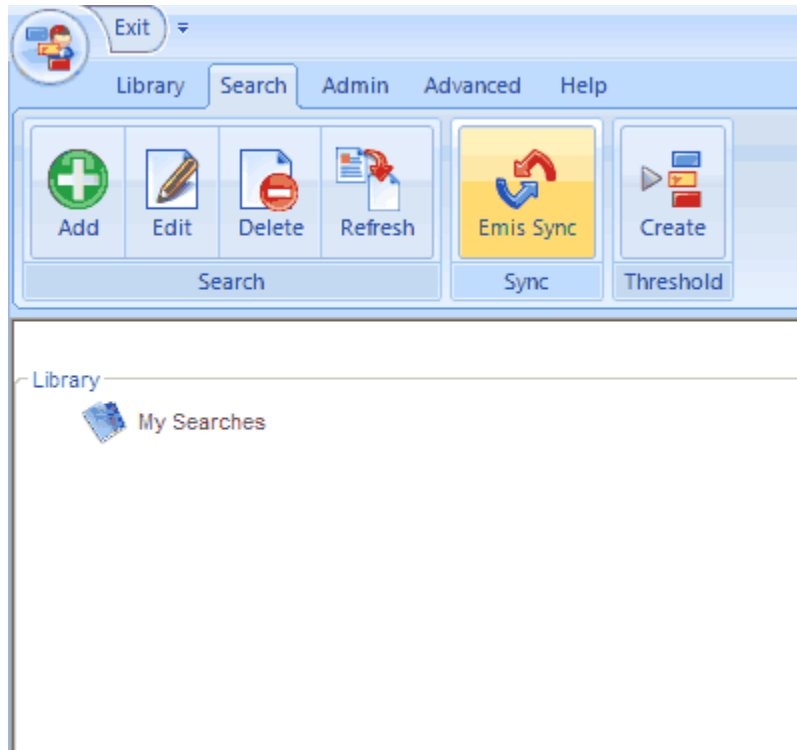


## Mail Merging – Creating QOF letters

In this section you will be shown how to:

- Create QOF patient invite letters ready to send to patients.

## Step 1 – Sync with EMIS



Syncing with EMIS will pull into PatientChase all the latest data with regard your practice's QOF status.

This will include:

- Patient registration data such as names, addresses, DOB etc
- All outstanding QOF targets from all clinical domains (e.g. Asthma, COPD, CHD etc)
- All chronic disease registers associated with the patients.

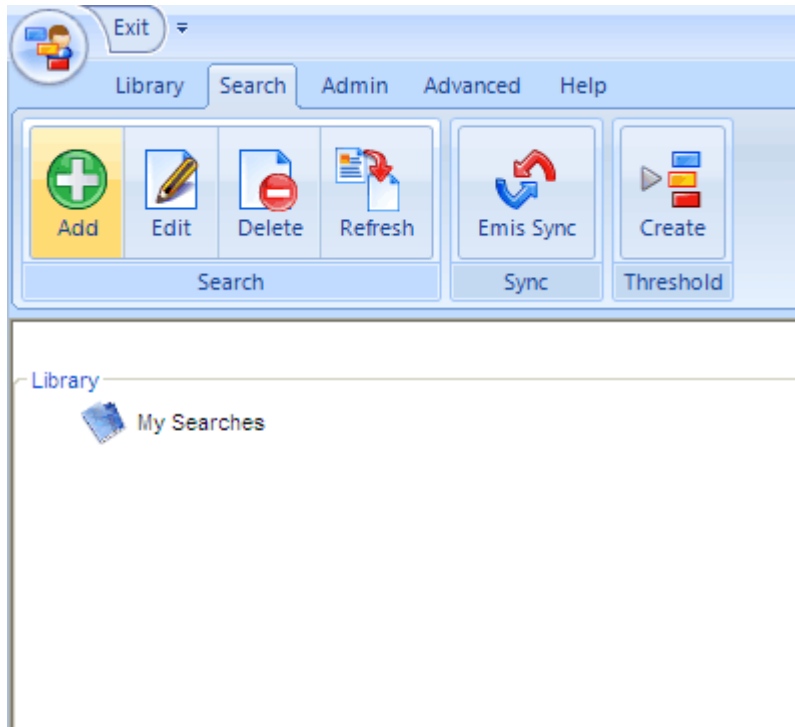
PatientChase uses the same data as EMIS Population Manager's **LOOK AHEAD** view.

The 'look ahead' period varies from practice to practice but is typically set at 3 months or 'end of financial year'.

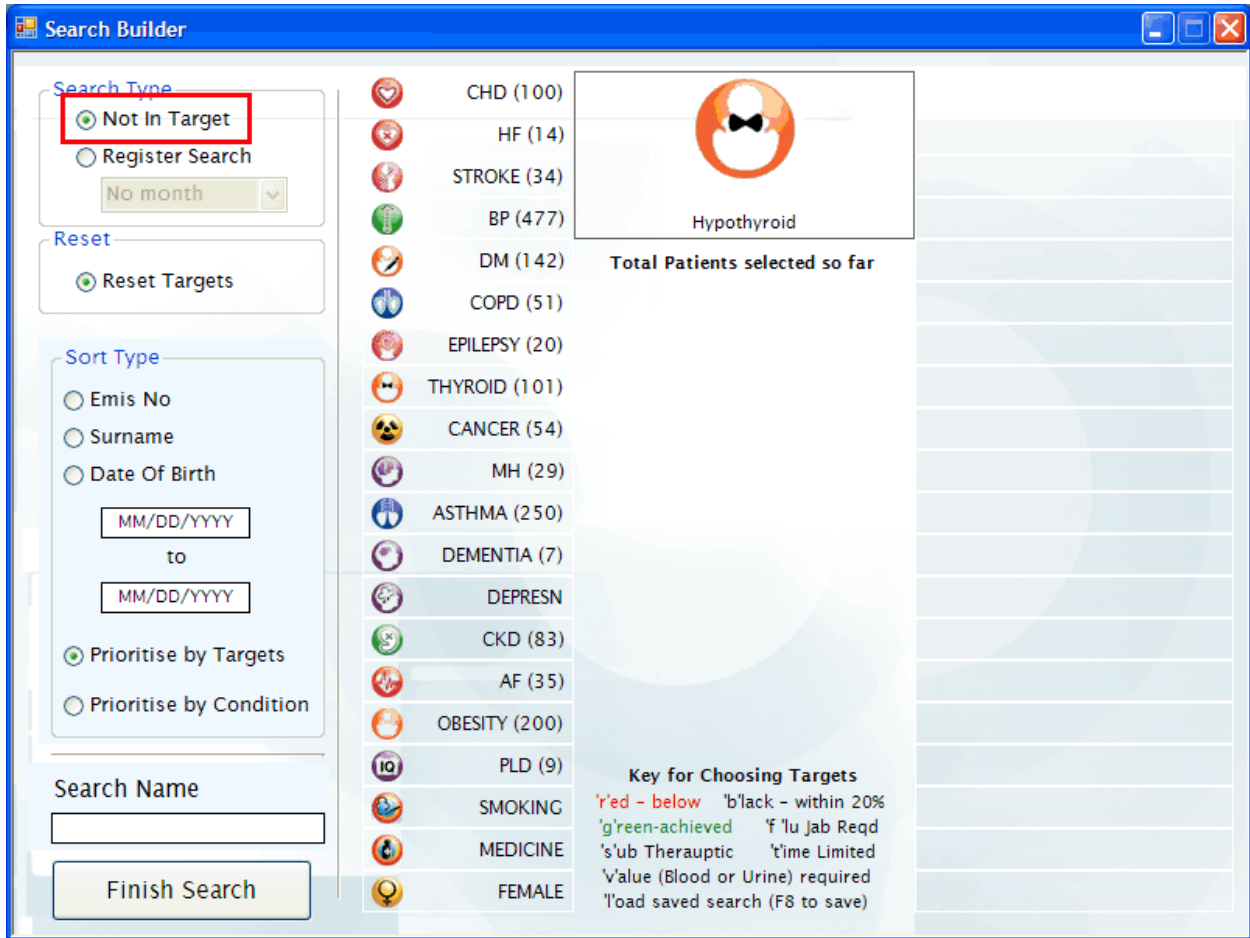
Check your own copy of EMIS Population Manager to see what yours is set to.

**NOTE:** If you change the look ahead view in PopMan, please allow until the following day for PatientChase to reflect these changes.

Step 2 – Add a new search



Step 3 – ‘Select Not in Target’ search



Numbers of patients within each register will be displayed by each register name.

Step 4 – Select your targets

**Search Builder**

**Search Type**

- Not In Target
- Register Search

No month

**Reset**

- Reset Targets

**Sort Type**

- Emis No
- Surname
- Date Of Birth

MM/DD/YYYY to MM/DD/YYYY

- Prioritise by Targets
- Prioritise by Condition

Search Name

Finish Search

<input checked="" type="checkbox"/>	CHD (100)
<input type="checkbox"/>	HF (14)
<input checked="" type="checkbox"/>	STROKE (34)
<input type="checkbox"/>	BP (477)
<input type="checkbox"/>	DM (142)
<input checked="" type="checkbox"/>	COPD (51)
<input type="checkbox"/>	EPILEPSY (20)
<input type="checkbox"/>	THYROID (101)
<input type="checkbox"/>	CANCER (54)
<input type="checkbox"/>	MH (29)
<input checked="" type="checkbox"/>	ASTHMA (250)
<input type="checkbox"/>	DEMENTIA (7)
<input type="checkbox"/>	DEPRESN
<input type="checkbox"/>	CKD (83)
<input type="checkbox"/>	AF (35)
<input type="checkbox"/>	OBESITY (200)
<input type="checkbox"/>	PLD (9)
<input type="checkbox"/>	SMOKING
<input type="checkbox"/>	MEDICINE
<input type="checkbox"/>	FEMALE

**Asthma**

Total Patients selected so far: **292**

**Key for Choosing Targets**

- \*red - below
- \*black - within 20%
- \*green-achieved
- \*lu Jab Reqd
- \*sub Therapeutic
- \*time Limited
- \*value (Blood or Urine) required
- \*load saved search (F8 to save)

ASTHMA3 - 14>19 + NO smok hist (8)

ASTHMA6- NO Rev in last 15m (166)

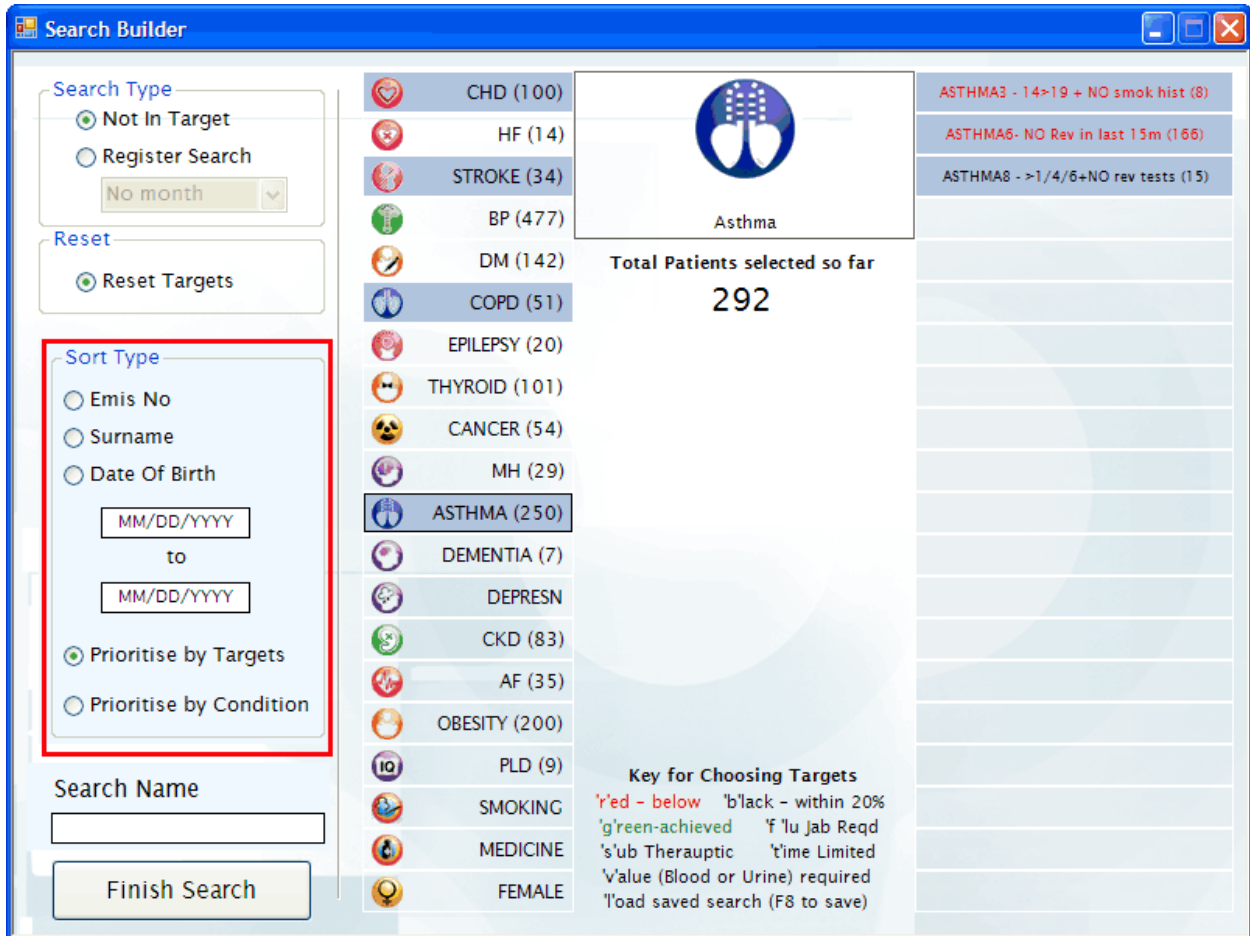
ASTHMA8 - >1/4/6+NO rev tests (15)

In this example, CHD, Stroke, COPD and Asthma patients were selected to form the group of patients to be recalled.

PatientChase found there 292 patients within this group.

Some of these patients will have targets in maybe 2, 3 or even 4 of the conditions selected.

Step 5 – Determine the sort order to view your results.



Before viewing the list of patients in your search, decide what order you'd like them displayed in.

The display order will be the order your letters come out in the mail merge.

By default, 'prioritise by targets' is selected as this is the most popular among surgeries.

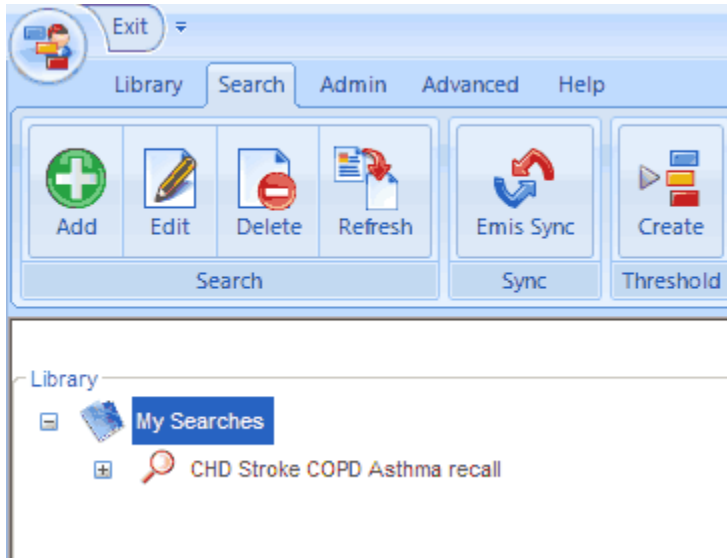
What this means is that the 'most complex' patients will be displayed at the top of your results and therefore invited in first.

Step 6 – Name your search and click Finish

The screenshot shows the 'Search Builder' window with the following elements:

- Search Type:**
  - Not In Target
  - Register Search
  - Month: No month
  - Reset:**  Reset Targets
- Sort Type:**
  - Emis No
  - Surname
  - Date Of Birth
  - MM/DD/YYYY to MM/DD/YYYY
  - Prioritise by Targets
  - Prioritise by Condition
- Search Name:** CHD Stroke COPD Asthma recal (highlighted with a red box)
- Finish Search** button (highlighted with a red box)
- Condition List:**
  - CHD (100)
  - HF (14)
  - STROKE (34)
  - BP (477)
  - DM (142)
  - COPD (51)
  - EPILEPSY (20)
  - THYROID (101)
  - CANCER (54)
  - MH (29)
  - ASTHMA (250)
  - DEMENTIA (7)
  - DEPRESN
  - CKD (83)
  - AF (35)
  - OBESITY (200)
  - PLD (9)
  - SMOKING
  - MEDICINE
  - FEMALE
- Target Summary:**
  - ASTHMA3 - 14>19 + NO smok hist (8)
  - ASTHMA6- NO Rev in last 15m (166)
  - ASTHMA8 - >1/4/6+NO rev tests (15)
- Total Patients selected so far:** 292
- Key for Choosing Targets:**
  - 'red - below
  - 'black - within 20%
  - 'green-achieved
  - 'lu Jab Reqd
  - 'sub Therapeutic
  - 'time Limited
  - 'value (Blood or Urine) required
  - 'load saved search (F8 to save)

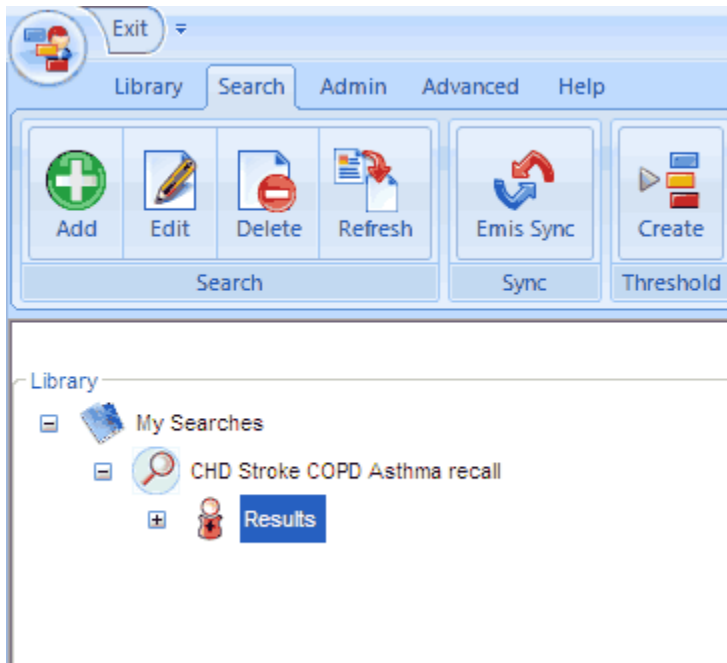
Step 7 – Loading your results



Click the + sign next to 'My Searches'.

Next:

Click the + sign next to the name of your search.



Next, click on the word 'Results'.

Step 8 – Viewing your results

	DateIns	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	Title	S	DateOfBirth	NHSNu
1		STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181	Mr	M	15/07/1982	5013942
2		CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964	Mrs	F	18/11/1951	1754920
3		CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249	Mr	M	23/06/1940	1843360
4		CHD,COPD	CHD		COPD		Crilly	Bridget	21765	Mrs	F	20/11/1957	6827250
5		CHD,STROKE	CHD	STROKE			Alexandroff	Carmen	19633	Mrs	F	11/09/1959	5775188
6		STROKE		STROKE			Mytko	Reid	23034	Mrs	F	03/12/1926	8896010
7		CHD	CHD				Martyn	Joel	10812	Mrs	F	27/03/1971	6452658
8		CHD,COPD	CHD		COPD		Bream	Ping	11143	Mr	M	08/11/1961	1152554
9		CHD,COPD	CHD		COPD		Macvean	Maryanne	8693	Mr	M	24/10/1933	7986997
10		CHD	CHD				Manzoor	Tomas	23757	Mrs	F	30/04/1933	5957864
11		STROKE		STROKE			Herring	Wesley	6017	Mr	M	17/09/1937	7099712
12		COPD,ASTHMA			COPD	ASTHMA	Juerss	Katie	22179	Mrs	F	01/10/1967	2037281
13		CHD	CHD				Rousseau	Hossein	131	Mr	M	02/03/1940	0637376
14		STROKE		STROKE			Cockrell	Bruno	24172	Mrs	F	15/10/1946	5165842
15		ASTHMA				ASTHMA	Kelly	Annette	25448	Mr	M	09/10/1985	1945938
16		STROKE		STROKE			Backhouse	Terrence	24419	Mr	M	19/05/1925	6794148
17		CHD	CHD				Wakefield	Nasser	1181	Mr	M	01/05/1961	8362208
18		CHD	CHD				Mynett	Nellie	3256	Mrs	F	28/02/1933	6011158
19		CHD	CHD				Craven	Bonita	23375	Mrs	F	28/07/1948	7272658
20		CHD	CHD				Cullum	Ffion	3733	Mrs	F	17/05/1931	7033598
21		CHD	CHD				Pick	Briaitte	20882	Mr	M	29/05/1979	9091544

<p>Total Patients in Search</p> <p><b>292</b></p>	<p><b>Date of Search: 07/12/2011</b>                  Search :Not in Target                  :Sorted by Target</p> <p>Emis No :24181                  Patient Name:Mr Laura Channon                  Address :Flat 5 Blackberry Lane Witney                  Surrey CR0 4UN                  TelNo :84012267</p>	  	<p><b>Mr Laura Channon</b></p> <div style="border: 1px solid red; padding: 5px;"> <p>STROKE6 - BP 150/90 or less                      STROKE7 - Cholesterol check in 15m                      STROKE8 - Cholesterol 5,0mmol/l                      COPD10 - FEV1 in last 15m                      COPD13 - Had a MRC Scoring                      ASTHMA6 - Rev in last 15m</p> </div>
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Your results will be displayed in the order you specified in Step 5.

Details for the highlighted patient will be shown in the 2 boxes below the list (in this example the patient on Row 1 is highlighted).

Notice PatientChase has identified the patient has QOF targets in Stroke, COPD and Asthma.

Clicking on any other patient will display their relevant targets.

Step 9 – Exporting to Word and Inserting to EMIS

The screenshot shows the PatientChase software interface. At the top, there is a menu bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu bar is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area is divided into two panes. The left pane shows a tree view of 'My Searches' with a search named 'CHD Stroke COPD Asthma recall'. A context menu is open over the 'Results' folder, listing options such as 'Delete Search', 'Export Search Results To Excel', and 'Export to Word AND Insert into EMIS'. The right pane displays a table of search results with columns for 'DateIn', 'Conditions', 'CHD', 'STROKE', 'COPD', 'ASTHMA', 'SurName', 'FirstNames', 'EmisN', and 'Title'. Below the table, there is a summary card for 'Mr Laura Channon' showing search details, patient information, and a list of conditions.

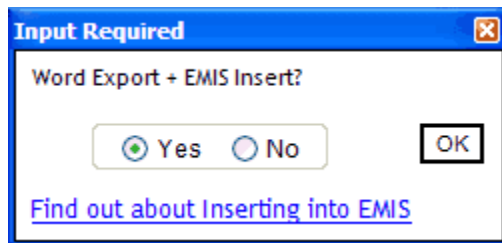
DateIn	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	Title
1	STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181	Mr
2	CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964	Mrs
3	CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249	Mr
4	CHD,COPD	CHD		COPD		Crilly	Bridget	21765	Mrs
5	CHD,STROKE	CHD	STROKE			Alexandroff	Carmen	19633	Mrs
6	STROKE		STROKE			Mytko	Reid	23034	Mrs
7	CHD	CHD				Martyn	Joel	10812	Mr
8	CHD,COPD	CHD		COPD		Bream	Ping	11143	Mr
9	CHD,COPD	CHD		COPD		Macvean	Maryanne	8693	Mr
10	CHD	CHD				Manzoor	Tomas	23757	Mrs
11	STROKE		STROKE			Herring	Wesley	6017	Mr
12	COPD,ASTHMA			COPD	ASTHMA	Juersh	Katie	22179	Mrs
13	CHD	CHD				Rousseau	Hossein	131	Mr
14	STROKE		STROKE			Cockrell	Bruno	24172	Mrs
15	ASTHMA				ASTHMA	Kelly	Annette	25448	Mr
16	STROKE		STROKE			Backhouse	Terrence	24419	Mr
17	CHD	CHD				Wakefield	Nasser	1181	Mr
18	CHD	CHD				Mynett	Nellie	3255	Mrs
19	CHD	CHD				Craven	Bonita	23375	Mrs
20	CHD	CHD				Cullum	Ffion	3733	Mrs
21	CHD	CHD				Pick	Briaitte	20882	Mr

**Summary Card: Mr Laura Channon**  
 Date of Search: 07/12/2011  
 Search :Not in Target  
 :Sorted by Target  
 Emis No :24181  
 Patient Name:Mr Laura Channon  
 Address :Flat 5 Blackberry Lane Witney  
 Surrey CR0 4UN  
 TelNo :84012267

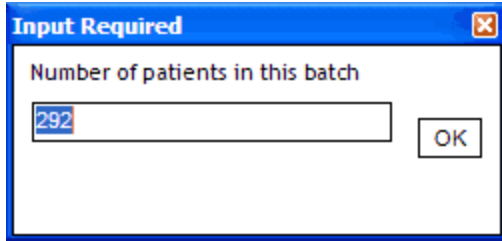
**Conditions:**  
 STROKE6 - BP 150/90 or less  
 STROKE7 - Cholesterol check ir  
 STROKE8 - Cholesterol 5.0mmol  
 COPD10 - FEV1 in last 15m  
 COPD13 - Had a MRC Scoring  
 ASTHMA6 - Rev in last 15m

Right click over the word 'Results' and select 'Export to Word AND Insert into EMIS'.

This process will create a mail merge (into Microsoft Word) of patient letters ready to print AND at the same time put a copy of each letter into the relevant patient medical records.



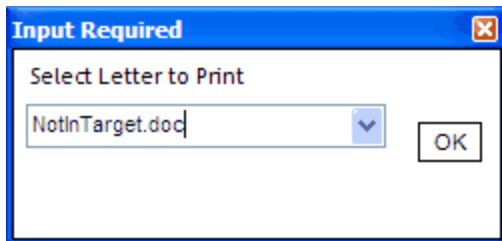
Click 'OK' to continue.



Decide how many patients you wish to invite at this time and type in the number.

(PatientChase will remember that it's sent out a first letter for that number of patients and whenever you decide to do a new batch, it will show how many patients are remaining).

Click OK.



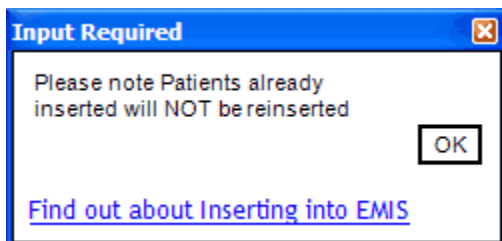
Now select the letter template you modified/created when setting PatientChase up. (See the 'How do I create my own letter template?' chapter).

Click OK.

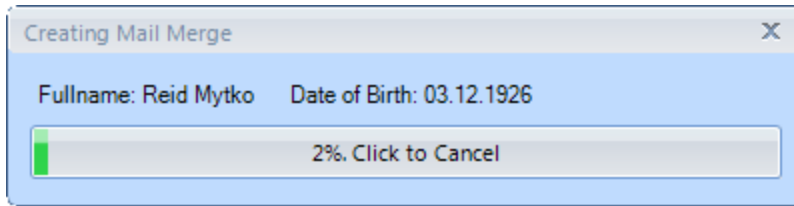


Select the date of insertion into EMIS using the calendar. The default is today's date.

Click OK.

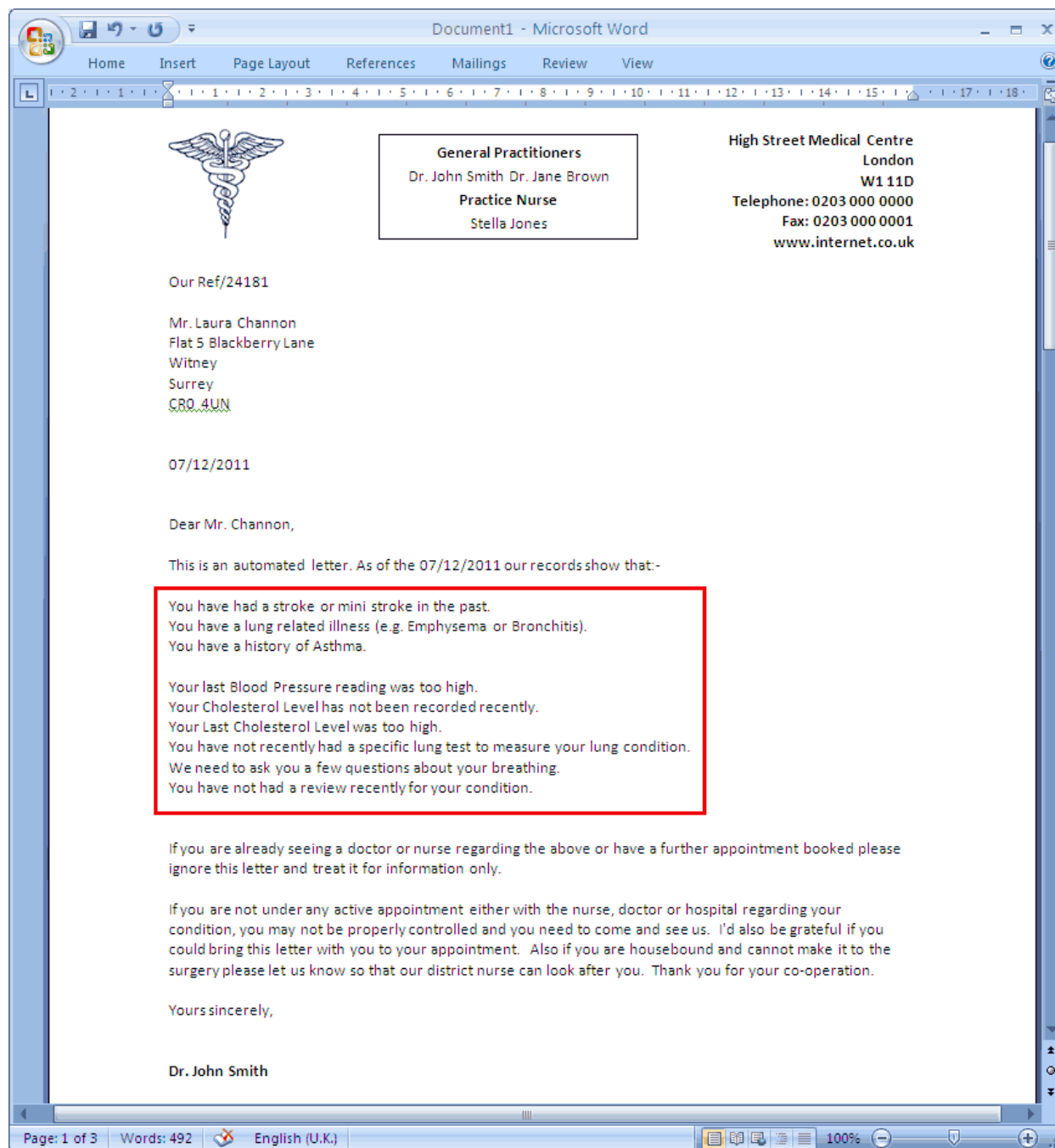


Click OK.



PatientChase will now create the mail merge for you and at the same time insert copies of the letters into the patients' medical records.

## Step 10 – The completed mail merge.



Above is a sample letter once the mail merge is complete and Word has opened.

Each letter is completely personalised to each patient and only the conditions and targets relevant to that particular patient appear on the letter.

An identical copy of the letter is stored as an attachment in the patient's notes.

Remember, the 'look and feel' and level of content is entirely down to you.

(See the 'How do I create my own letter template?' chapter to customise your own templates).