Creating a letter template

In this section you will be shown how to:

- Modify a preloaded PatientChase letter template with your preferences.

MODIFY YOUR LETTER TEMPLATE BEFORE YOU START CREATING MAIL MERGES.

PatientChase is preloaded with 2 main letter templates. One to use as the basis for your QOF letters and an alternative one if you recall your patients using month of birth.

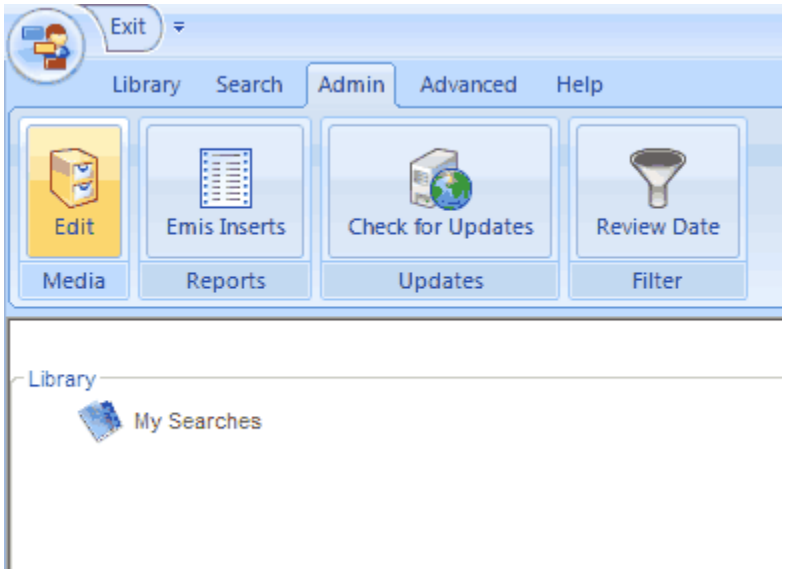
Both templates are fully customisable and this section shows you how to add your own practice header, your own wording and alter the automated prose in some of the merge fields.

This section uses the QOF letter template as the example. If you prefer to recall via month of birth, follow exactly the same steps, except:

Step 2 - select the register.doc template.

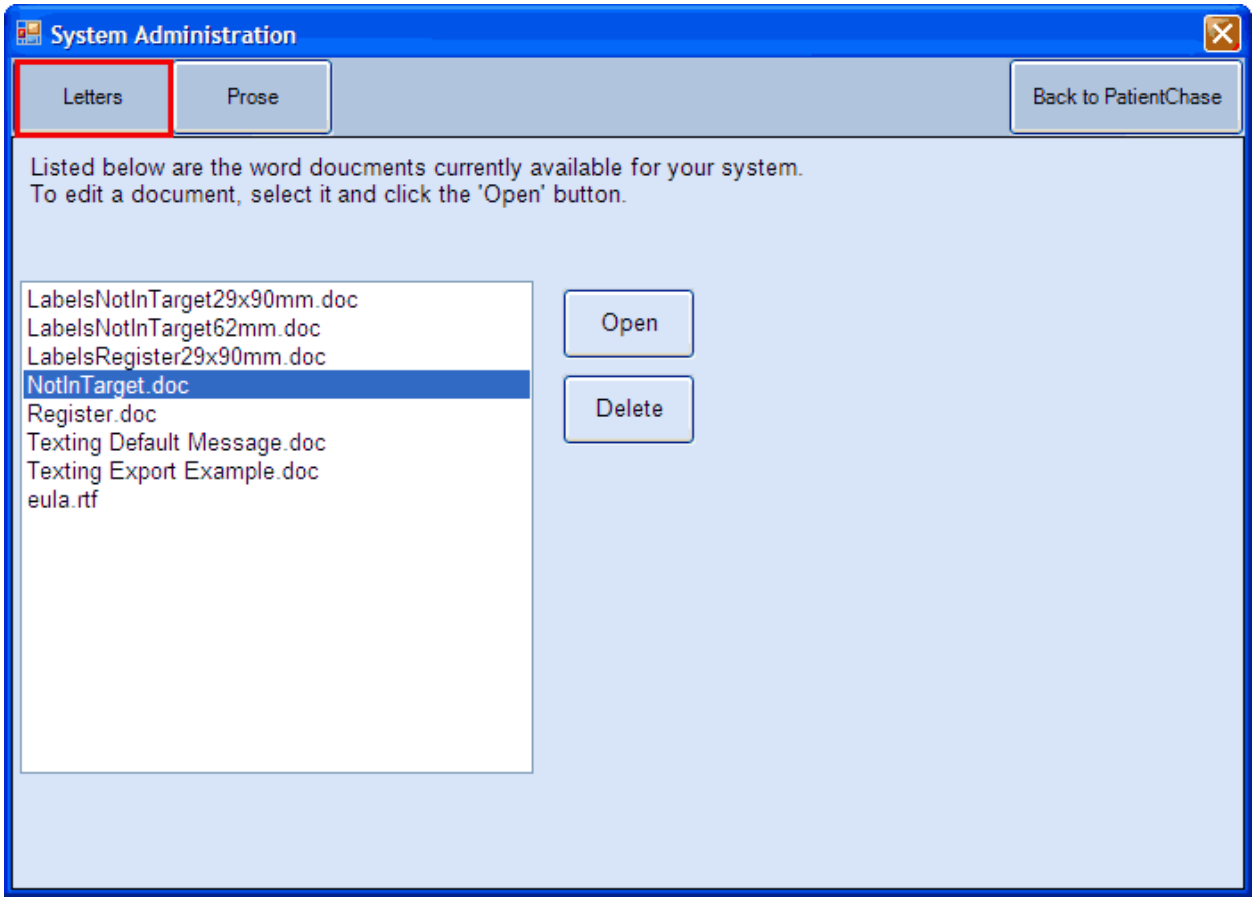
Step 4 – decide whether you wish to modify the terms in the [Condition] field only.

Step 1 – Open System Administration



To do this, go to the Admin menu then click 'Edit'.

Step 2 – Select the 'Letters' tab.

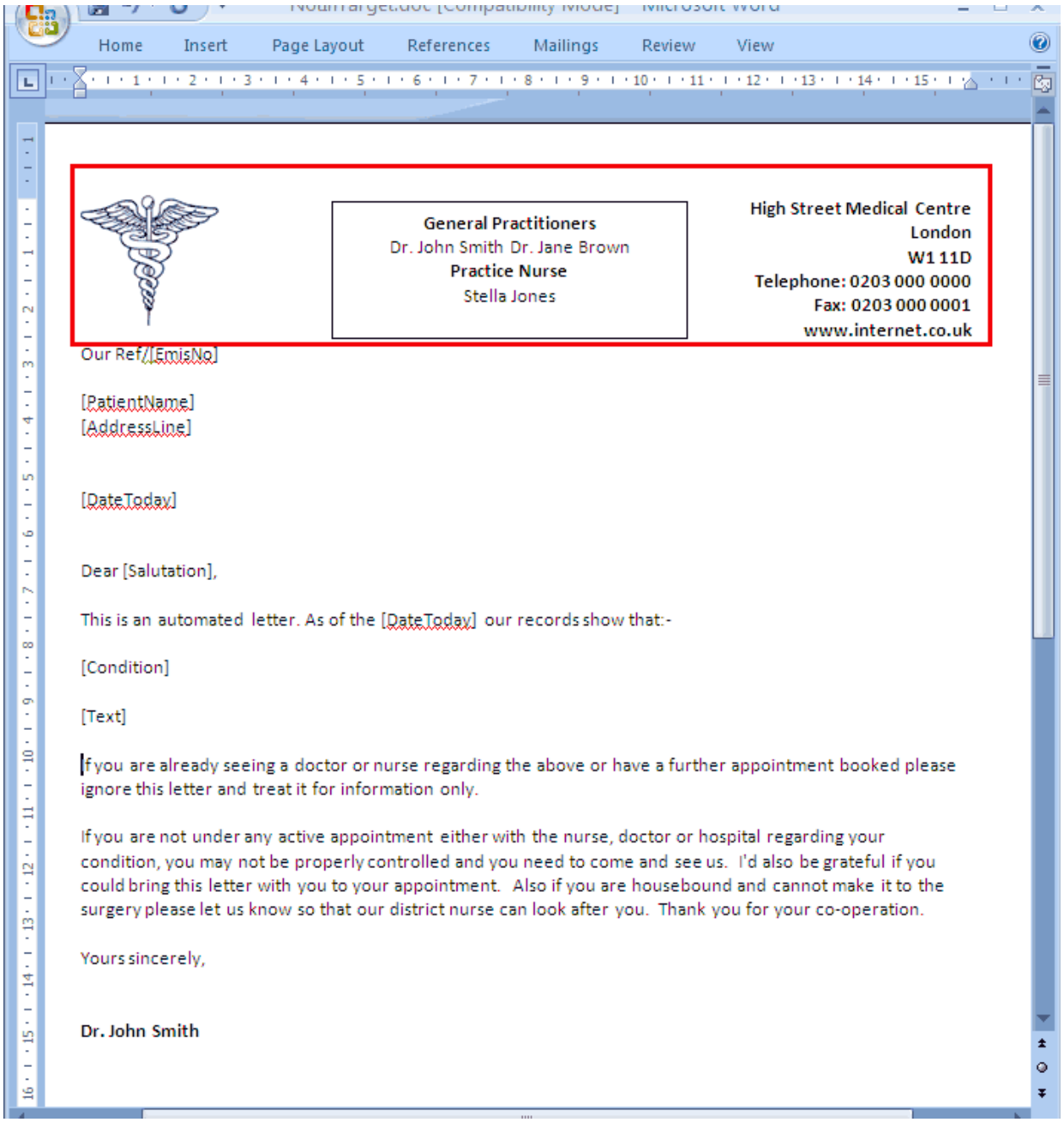


Click on NotInTarget.doc.

Click Open.

The template opens in Microsoft Word.

Step 3 – Modifying the wording in Microsoft Word.



In the example above a practice letterhead and signature has already been added. You'll need to add your own. You can simply copy and paste one from any of your Word documents.

If you wish to change the wording or layout of the template, feel free to do so.

Once you're happy with your template click Save.

Step 4 – Modifying the [Condition] and [Text] fields.

Dear [Salutation],

This is an automated letter. As of the [DateToday] our records show that:-

[Condition]

[Text]

If you are already seeing a doctor or nurse regarding the above or have a further appo
ignore this letter and treat it for information only.

If you are not under any active appointment either with the nurse, doctor or hospital

The [Condition] field tells the patient which condition they are being recalled for.

The [Text] field details which QOF targets apply to the patient.

This is how the [Condition] and [Text] fields can look in a mail merged letter:

Dear Mrs. Beech,

This is an automated letter. As of the 07/12/2011 our records show that:-

You have a history of a heart related condition.
You have a history of Asthma.

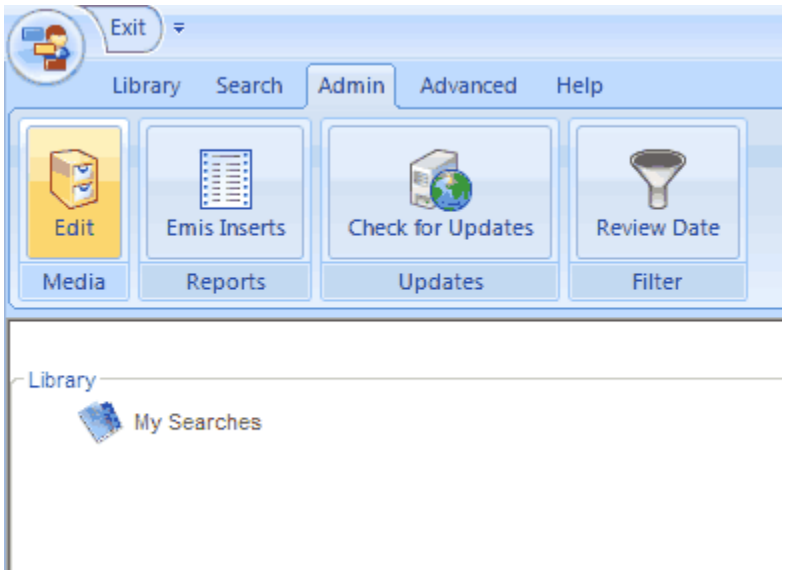
Your last Blood Pressure reading was too high.
You should be on Medication to help thin the blood.
You might need to be on a drug called a Beta Blocker.
You have not had a review recently for your condition.
Your Asthma needs to be confirmed with a lung test.

If you are already seeing a doctor or nurse regarding the above or have a further a

Should you wish to remove either merge field from your template, simply delete it in Step 3.

Should you wish to keep either field, but change the wording, do the following:

Open System Administration by going to the Admin menu then clicking 'Edit'.



Click on the 'Prose' tab.

System Administration

Letters | Prose | Back to PatientChase

Amend the short text (for Labels and Texting) or Prose (for Letters).

Target	Type	Short Text	Prose for Letters
AF1 - Patients on AF Register	Register	Irregular Heart Beat	You have a history of an irregular heart.
AF3 - AF on Anticoagulation	NotInTarget	Medication	You should be on Medication to help thin the blood.
AF4 - New AF with ECG	NotInTarget	Irregular Heart Beat	You have recently been diagnosed as having an irregular heart beat not confirmed on a Heart Monitor.
ASTHMA1 - Patients on Asthma register	Register	Asthma	You have a history of Asthma.
ASTHMA3 - 14>19 + smoking history	NotInTarget	Smoking Status	Your Smoking Status has not been recorded recently.
ASTHMA6- Rev in last 15m	NotInTarget	Asthma	You have not had a review recently for your condition.
ASTHMA8 - >1/4/06+rev testing	NotInTarget	Asthma	Your Asthma needs to be confirmed with a lung test.
BP1 - Patients on BP Register	Register	Blood Pressure	You have a history of High Blood Pressure and are on Medication for this.
BP4 - BP check in last 9 months	NotInTarget	Blood Pressure	Your Blood Pressure has not been recorded recently.
BP5 - BP 150/90 or less	NotInTarget	Blood Pressure	Your last Blood Pressure reading was too high.
CANCER1 - On Cancer Register >1/4/03	Register	Cancer	Have had a diagnosis of Cancer in the last few years.
CANCER3 -Cancer Rev from diagnosis	NotInTarget	Cancer	You have not had a cancer review recently.

In the 'Prose for Letters' column click on the term you wish to change and retype the entry. Run through the list to see if you wish to change any other terms.

If you are running month of birth letters, focus only the Register terms appearing in the 'Type' column.

Once you're happy with all the terms that could appear on your letters, click 'Back to PatientChase'.

From now on, your modified terms will appear on your patient letters.