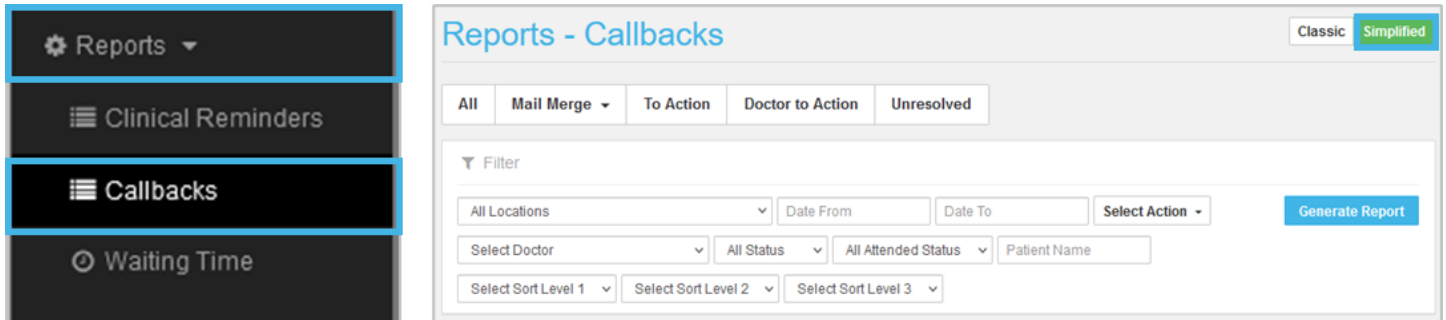


Callbacks Mail Merge Guide

This guide will take you through how to use **export a letter** using the **Simplified Report - Mail Merge**

Access the **Simplified Report**, in your Dashboard. **Go to Reports > Select Callbacks > Click Simplified**



Report - Mail Merge

Use this Report: To view all patients in mail merge.

How can this Report be used: To export letters to patients, mark patients as confirmed, and view patients who have been previously exported a letter, or who have been marked as confirmed.

What the filters show:

All: View Everything in mail merge







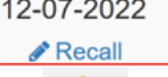


To Post: View Patients who have not been exported a letter or not marked as confirmed

Exported: View Mail Merge Letters previously exported to patients,

Confirmed: View Results previously marked as confirmed

Know your icons

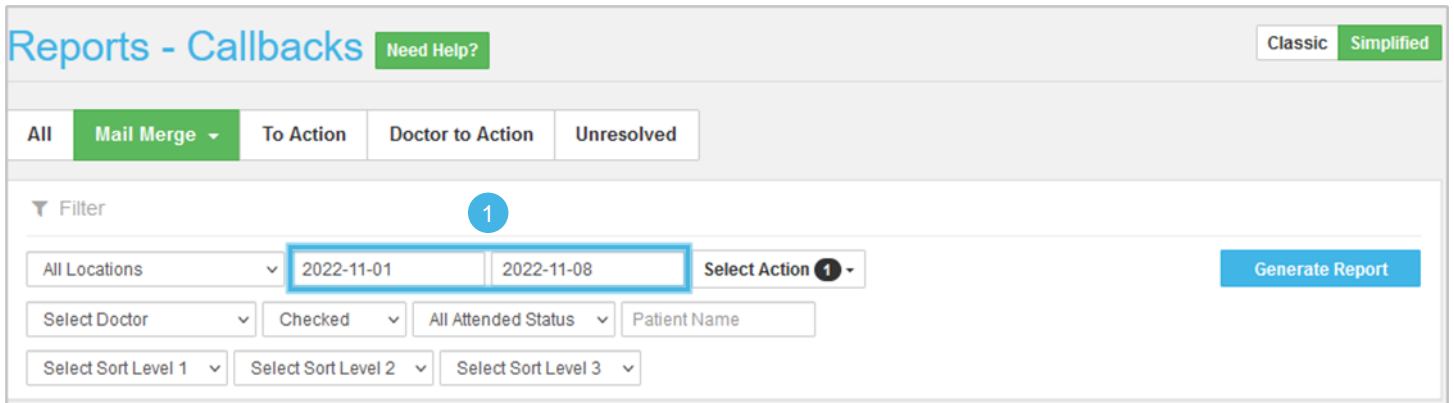
Listed below are the common icons you'll see in the report

	Patient has been sent one SMS message		Mail merge generated
	Patient has been sent two SMS messages		Result has been exported a letter
	SMS not be sent, mail merge generated		Result has been marked as confirmed
	Upcoming appointment type booked. Note: The report also displays the Doctor's name		
	Results with this icon has been marked as abnormal by the Doctor		
	Click the cog icon, to view patient info, appointments, leave notes, send SMS messages and mark confirm		

How to Export a Letter

Choose your required filters:

1. Enter your date range
 - Enter the **Date From** date (you can run the report up to 90 days)
 - Enter the **To Date** as today's date



Reports - Callbacks Need Help? Classic Simplified

All **Mail Merge** To Action Doctor to Action Unresolved

Filter

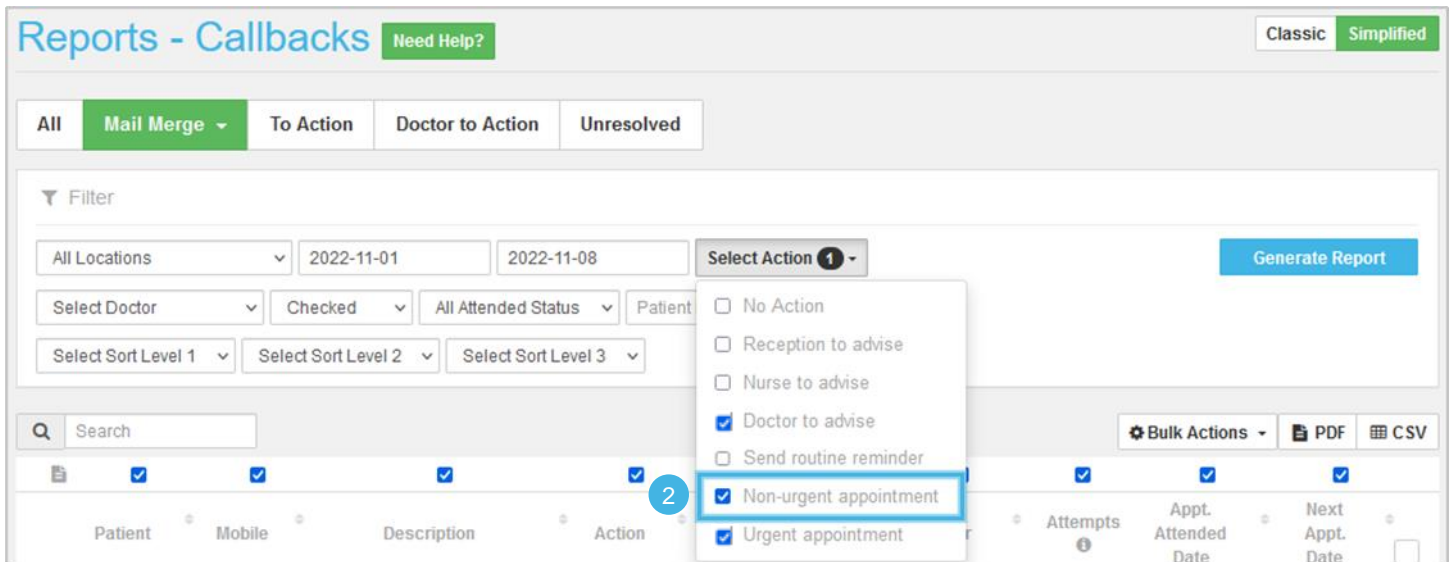
All Locations 2022-11-01 2022-11-08 Select Action 1

Select Doctor Checked All Attended Status Patient Name

Select Sort Level 1 Select Sort Level 2 Select Sort Level 3

Generate Report

2. **Best Practice** - Select the **Action** you are following up, e.g. Discuss/Non- Urgent Appointment



Reports - Callbacks Need Help? Classic Simplified

All **Mail Merge** To Action Doctor to Action Unresolved

Filter

All Locations 2022-11-01 2022-11-08 Select Action 1

Select Doctor Checked All Attended Status Patient Name

Select Sort Level 1 Select Sort Level 2 Select Sort Level 3

Search

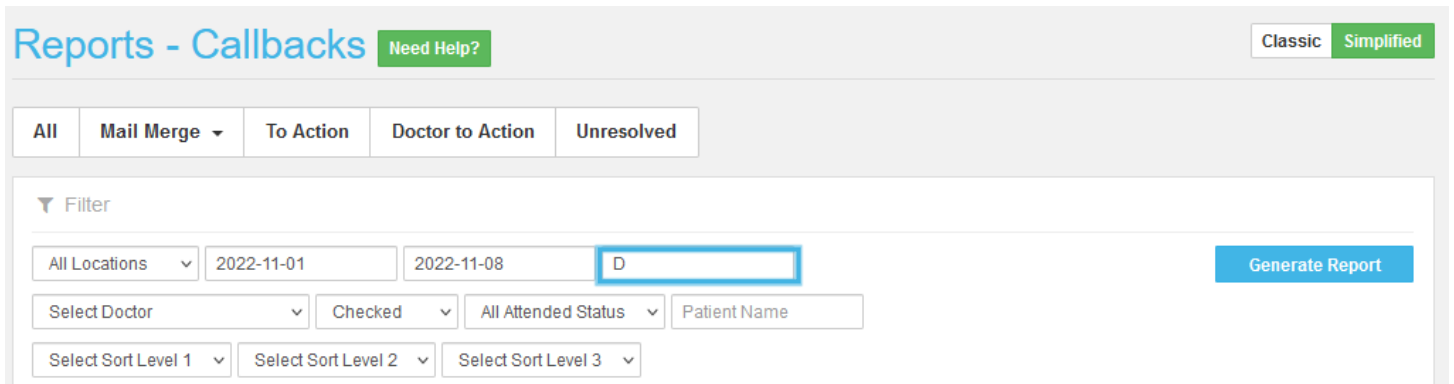
No Action
 Reception to advise
 Nurse to advise
 Doctor to advise
 Send routine reminder
 Non-urgent appointment
 Urgent appointment

Bulk Actions PDF CSV

Patient Mobile Description Action

Attempts Appt. Attended Date Next Appt. Date

Medical Director/PracSoft- Enter the **Action** you are following up, e.g. D for discuss, R for Return Urgently



Reports - Callbacks Need Help? Classic Simplified

All **Mail Merge** To Action Doctor to Action Unresolved

Filter

All Locations 2022-11-01 2022-11-08 D

Select Doctor Checked All Attended Status Patient Name

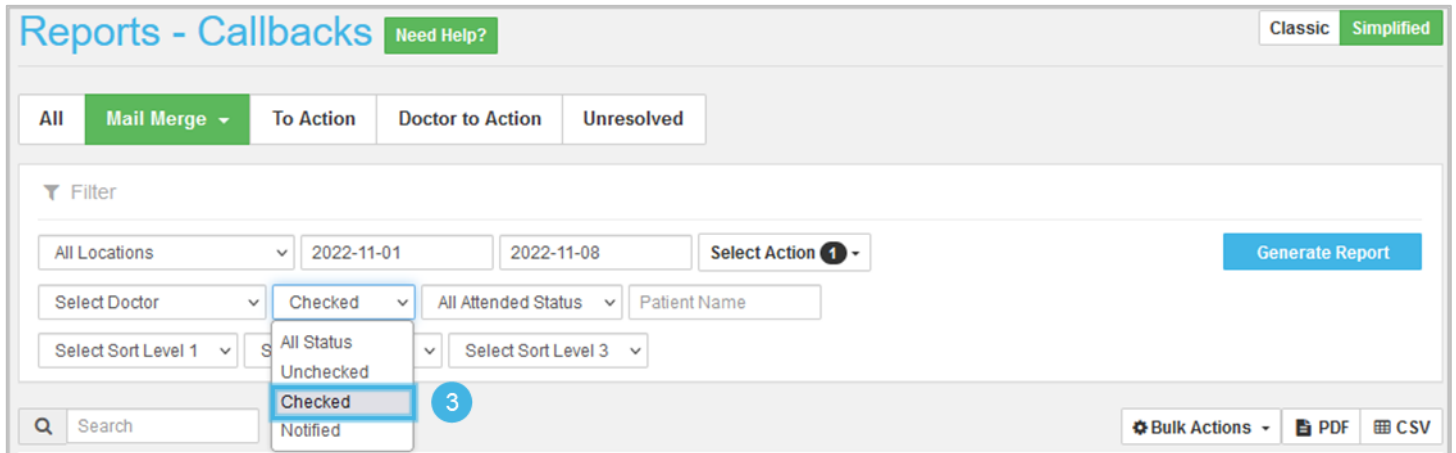
Select Sort Level 1 Select Sort Level 2 Select Sort Level 3

Generate Report

How to Export a Letter

3. Change the status to **Checked**

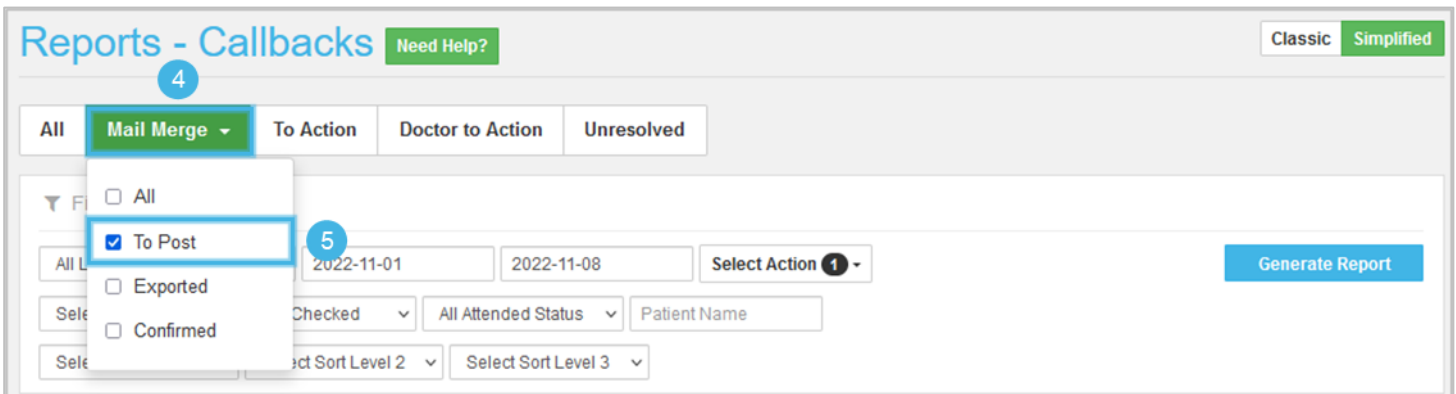
- Checked indicates that the doctor has given the result an action in the Practice Management Software (Best Practice, Medical Director)



The screenshot shows the 'Reports - Callbacks' interface. The 'Mail Merge' dropdown menu is open, and the 'Checked' option is selected. A blue circle with the number '3' highlights the 'Checked' option. Other options in the menu include 'All Status', 'Unchecked', and 'Notified'. The interface also shows filters for 'All Locations', dates, and a 'Generate Report' button.

4. Click the down arrow next to **Mail Merge**

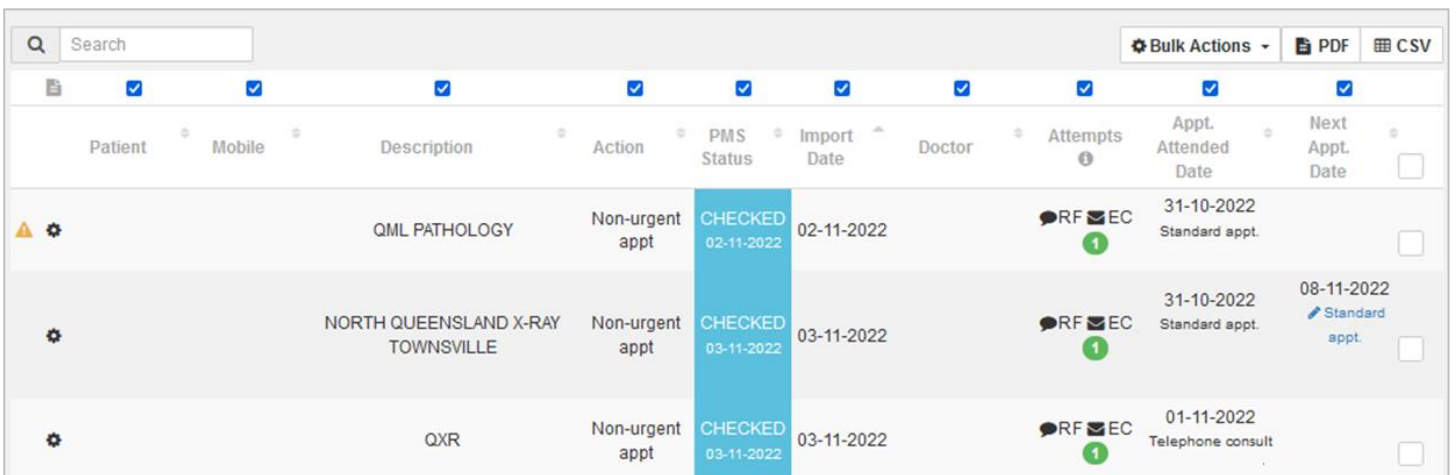
5. Tick the **To Post** tick box



The screenshot shows the 'Reports - Callbacks' interface. The 'Mail Merge' dropdown menu is open, and the 'To Post' option is selected. A blue circle with the number '5' highlights the 'To Post' option. Other options in the menu include 'All', 'Exported', and 'Confirmed'. The interface also shows filters for 'All Locations', dates, and a 'Generate Report' button.

The report will now display **generated mail merges only**.

If the result does not have a mail merge generated, it will not show in this section of the report.

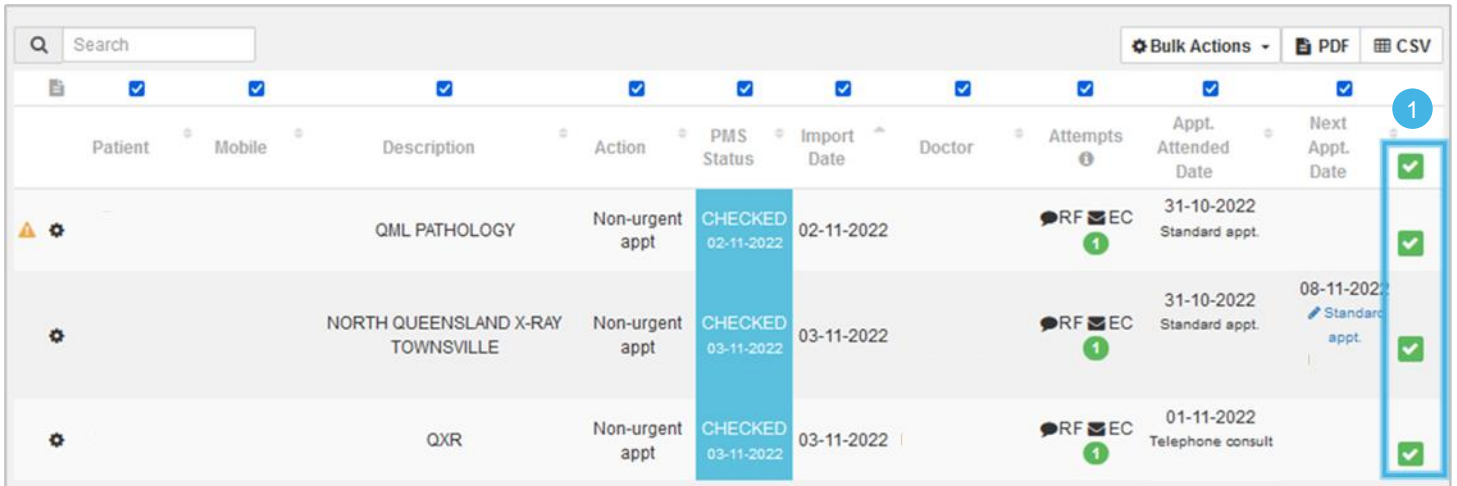


The screenshot shows the 'Reports - Callbacks' interface displaying a table of generated mail merges. The table has columns for Patient, Mobile, Description, Action, PMS Status, Import Date, Doctor, Attempts, Appt. Attended Date, and Next Appt. Date. The 'PMS Status' column is highlighted in blue, and the 'To Post' checkbox is checked in the 'Mobile' column.

Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
	<input checked="" type="checkbox"/>	QML PATHOLOGY	Non-urgent appt	CHECKED 02-11-2022	02-11-2022		RF EC 1	31-10-2022 Standard appt.	
	<input checked="" type="checkbox"/>	NORTH QUEENSLAND X-RAY TOWNSVILLE	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	31-10-2022 Standard appt.	08-11-2022 Standard appt.
	<input checked="" type="checkbox"/>	QXR	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	01-11-2022 Telephone consult	

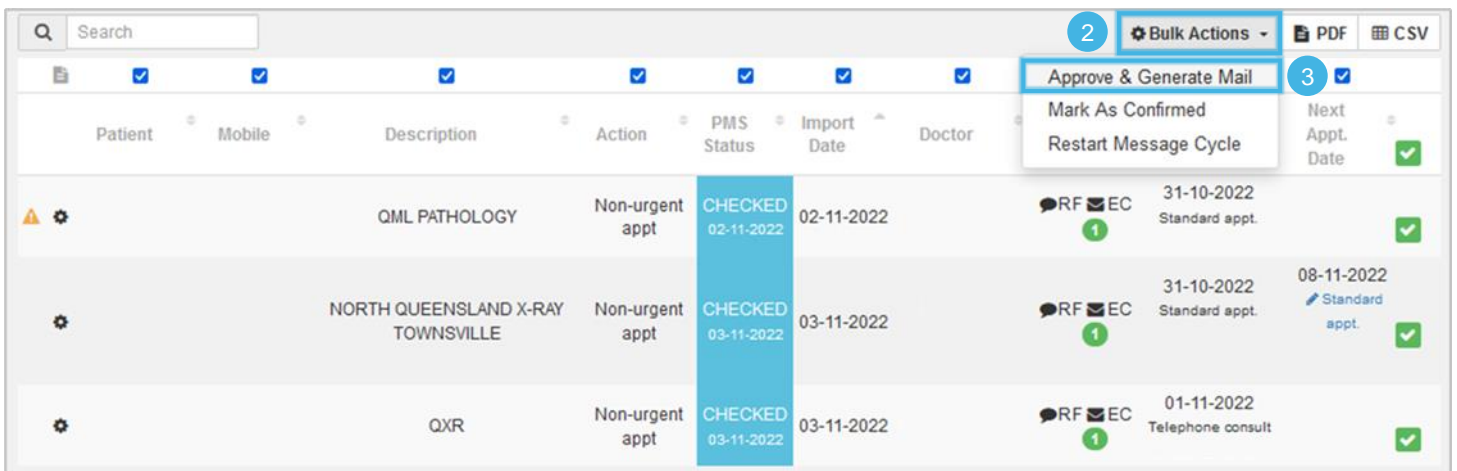
How to Export a Letter

- Select the patient's result, by ticking the **tick box** in the patient row
 - To select all rows, select the very top tick box



Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QML PATHOLOGY	Non-urgent appt	CHECKED 02-11-2022	02-11-2022		RF EC 1	31-10-2022 Standard appt.	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORTH QUEENSLAND X-RAY TOWNSVILLE	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	31-10-2022 Standard appt.	08-11-2022 Standard appt.
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QXR	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	01-11-2022 Telephone consult	

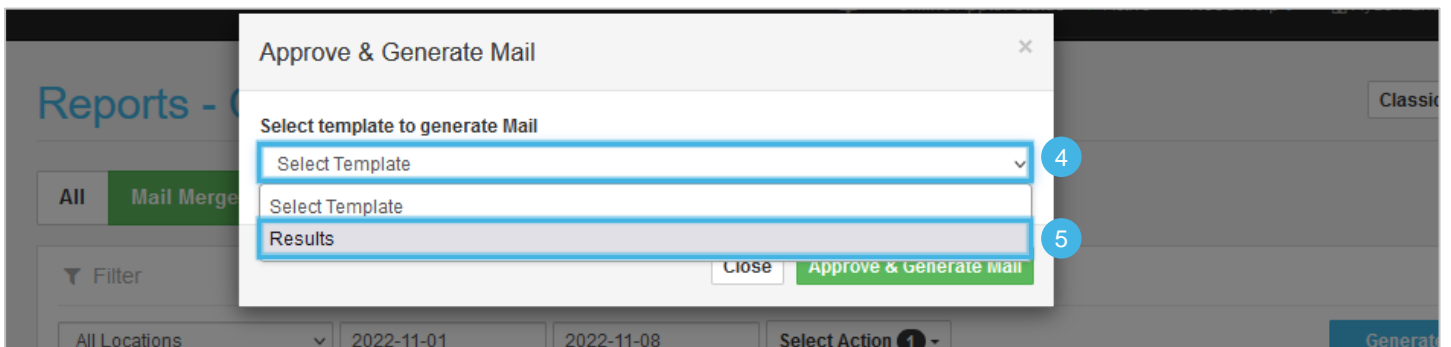
- Click **Bulk Actions**
- Select **Approve & Generate Mail**



Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QML PATHOLOGY	Non-urgent appt	CHECKED 02-11-2022	02-11-2022		RF EC 1	31-10-2022 Standard appt.	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORTH QUEENSLAND X-RAY TOWNSVILLE	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	31-10-2022 Standard appt.	08-11-2022 Standard appt.
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QXR	Non-urgent appt	CHECKED 03-11-2022	03-11-2022		RF EC 1	01-11-2022 Telephone consult	

A pop-up will appear:

- Click the **down arrow** to view your templates
- Select your **Template**



Approve & Generate Mail

Select template to generate Mail

Select Template

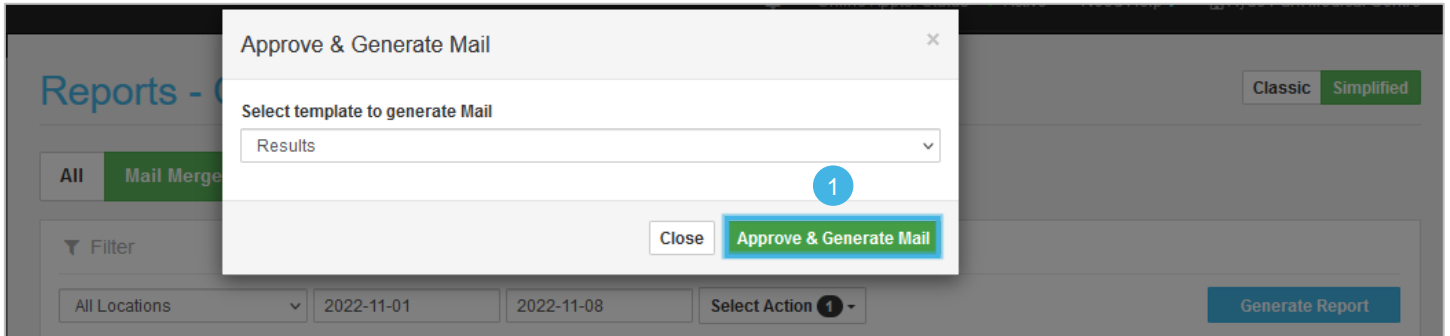
Select Template

Results

Close Approve & Generate Mail

How to Export a Letter

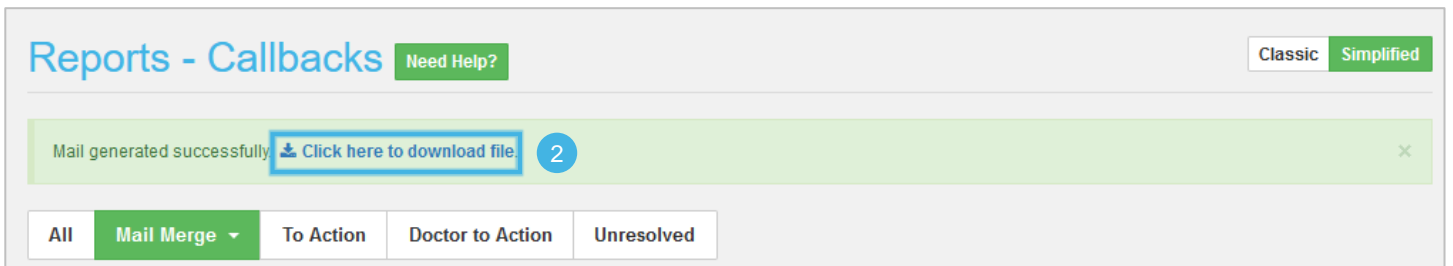
1. Click [Approve and Generate Mail](#)



The system will start generating the letter.

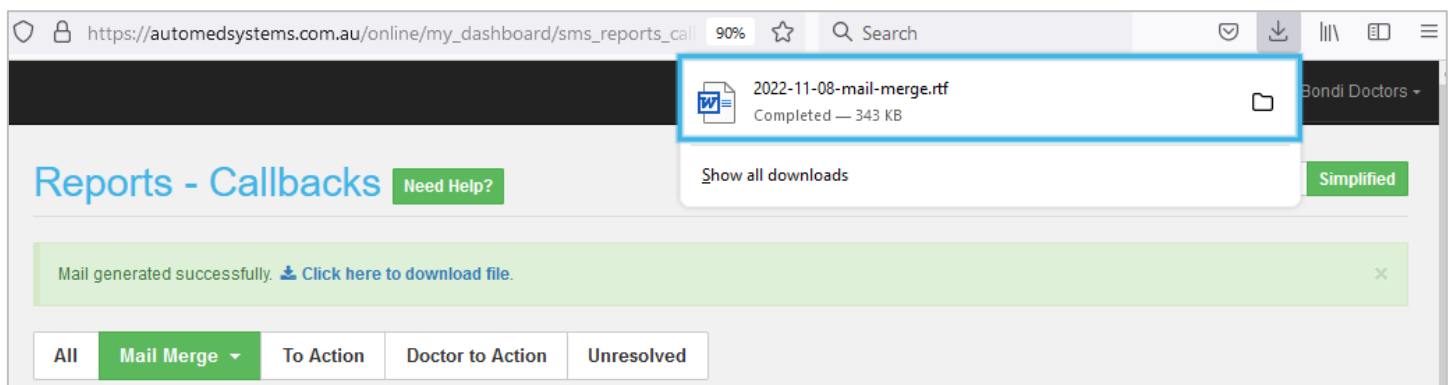
Once the letter is ready, a **green pop-up** will appear instructing to download the letter.

2. Select – [Click here to download the file](#)

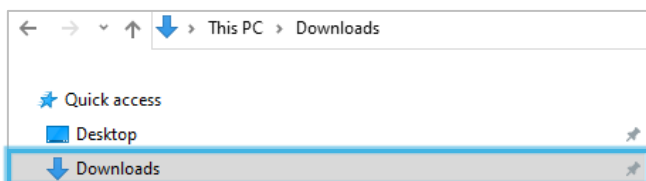


The letter will start downloading:

Once ready, you may get a **pop-up** in your internet browser showing the letter has downloaded.



If you do not get the pop-up, please go to your [downloads folder](#) on your computer to view the letter.



How to Export a Letter

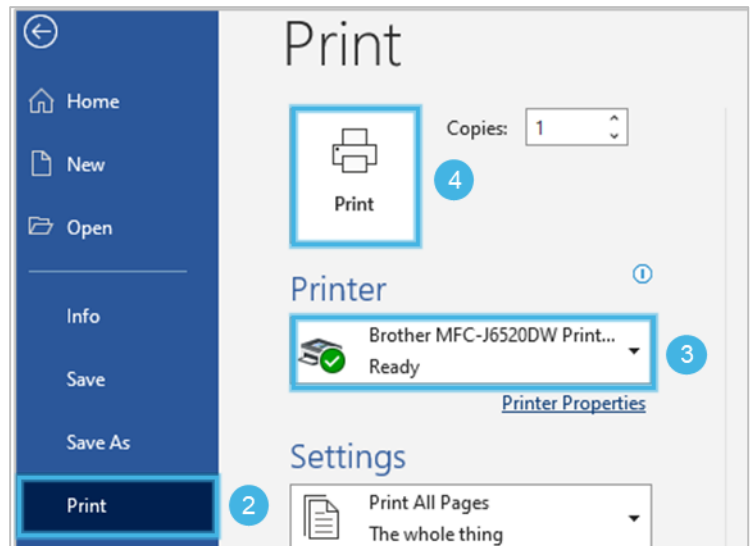
Open the letter once the file has downloaded:

1. Click **File**



1. Click **Print** in the left menu
2. Select the **Printer**
3. Click **Print**

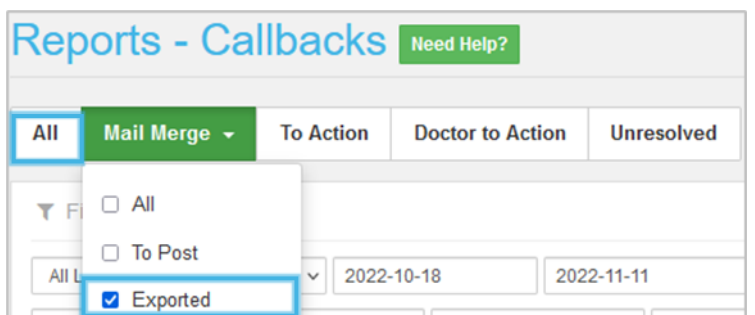
Your letter/s will start printing.



What happens after you export the letter:

The result will be removed from the **To Post report**, you can find the result in the following areas:

- All Report
- Exported Report



You can also find previously exported letter in the Dashboard, by going to **Reports > Mail Merge Export History**

