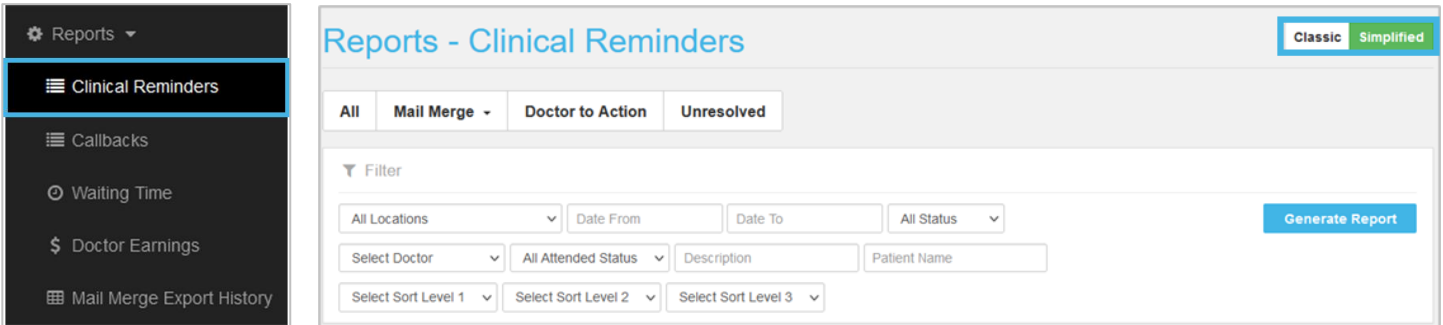


Clinical Reminders Mail Merge Guide

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 Clinical Reminders > Click Simplified**



Report - Mail Merge

- All:** View everything in your report
- Mail Merge:** View all patients in mail merge
- Doctor To Action:** View patients who have attended an appointment, but their Clinical Reminder have not been marked as completed in BP or MD, by the Doctor.
- Unresolved:** View patients who have not booked an appointment since their Clinical Reminder was due and the follow up timeframe has finished

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

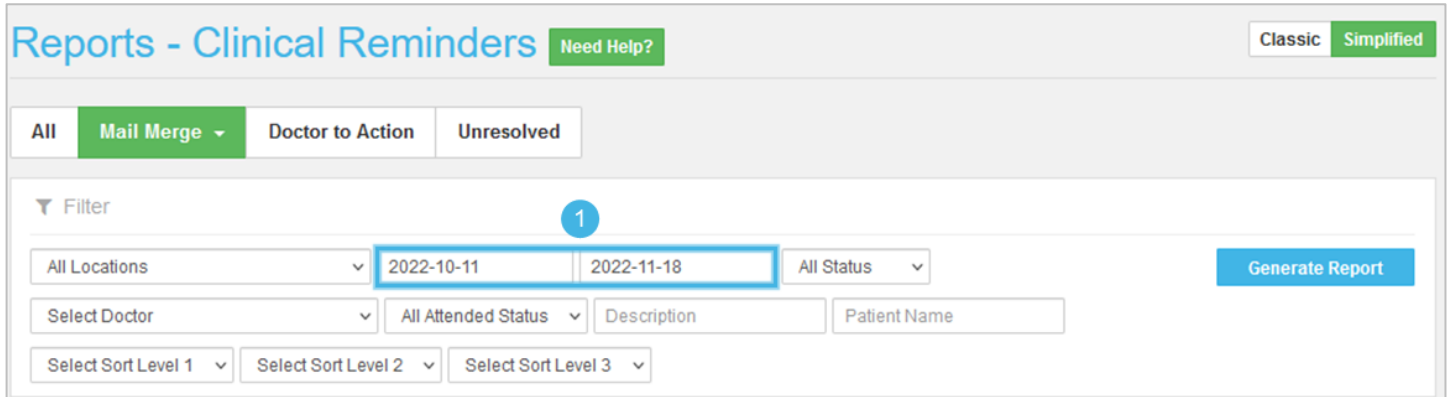
Listed below are the common icons you'll see in the report

	Patient has been sent one SMS message		Mail merge generated
	Patient has been sent two SMS messages		Clinical Reminder has been exported a letter
	Patient has no mobile, mail merge generated		Clinical Reminder has been marked as confirmed
28-06-2022 Standard appt.	Upcoming appointment type booked. Note: The report also displays the Doctor's name		
	Click the cog icon, to view patient info, appointments, leave notes, send SMS messages and mark confirm		
	Clinical Reminders with this icon has been marked as Clinically Significant in the Practice Management Systems		

How to Export a Letter

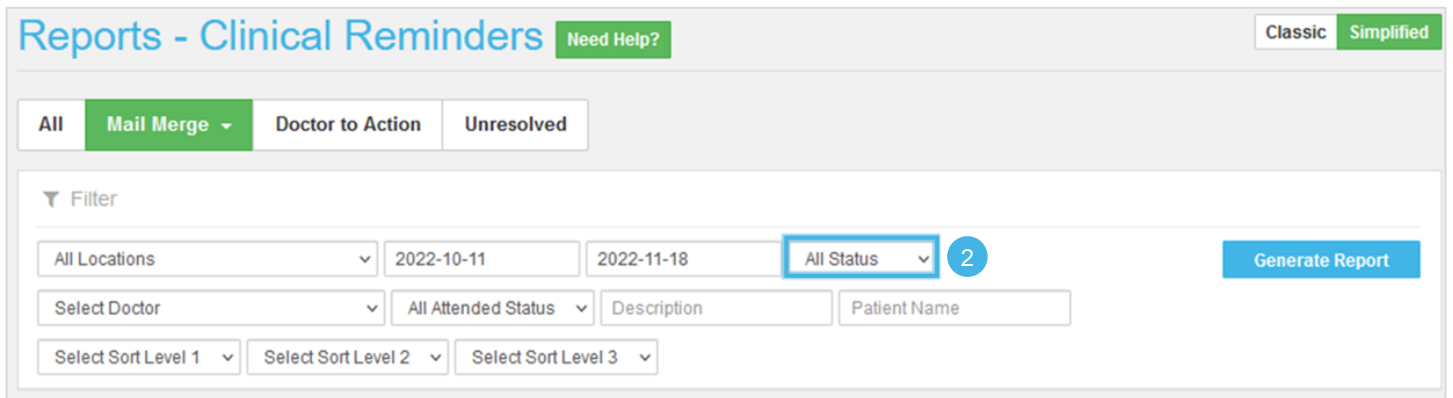
Choose your required filters:

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

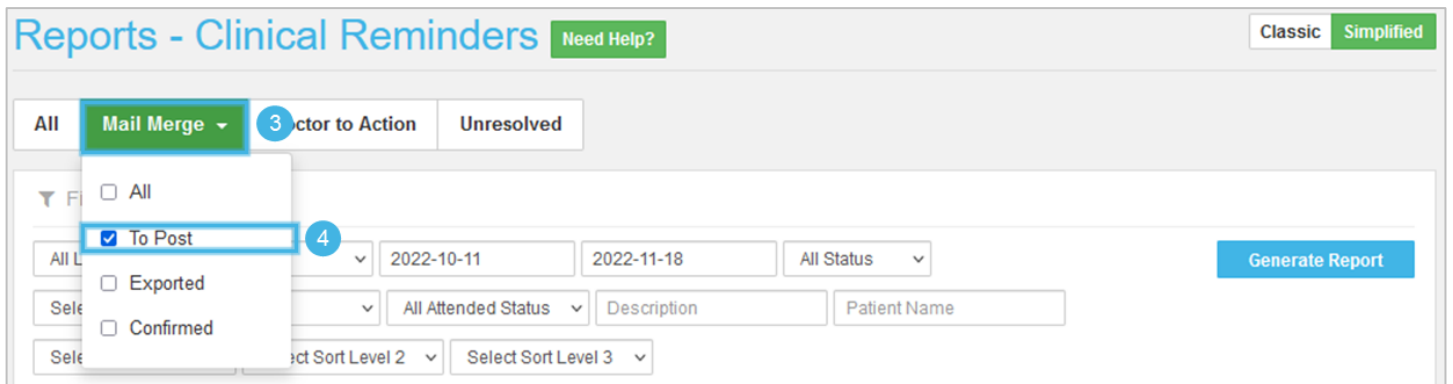


2. Select the **Status**

- **Contacted** signifies a contact attempt has been made in Practice Management Software (Best Practice or Medical Director)
- **Open** signifies a SMS could not be sent or the reminder is not due for a SMS to be sent yet



3. Click the down arrow next to **Mail Merge**
4. Tick the **To Post** tick box

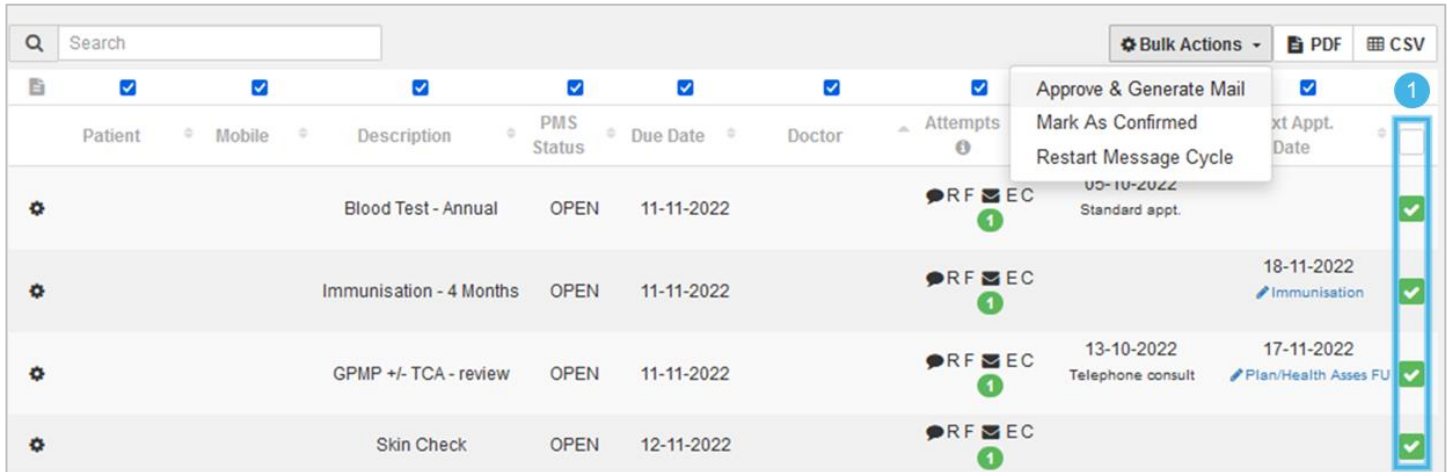


How to Export a Letter

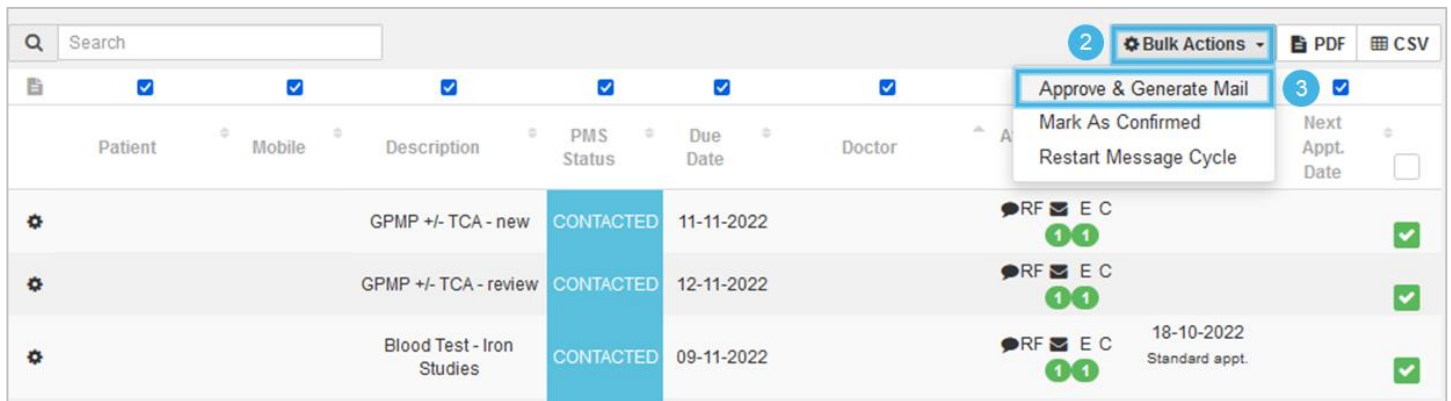
The report will now display **generated mail merges only**.

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

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

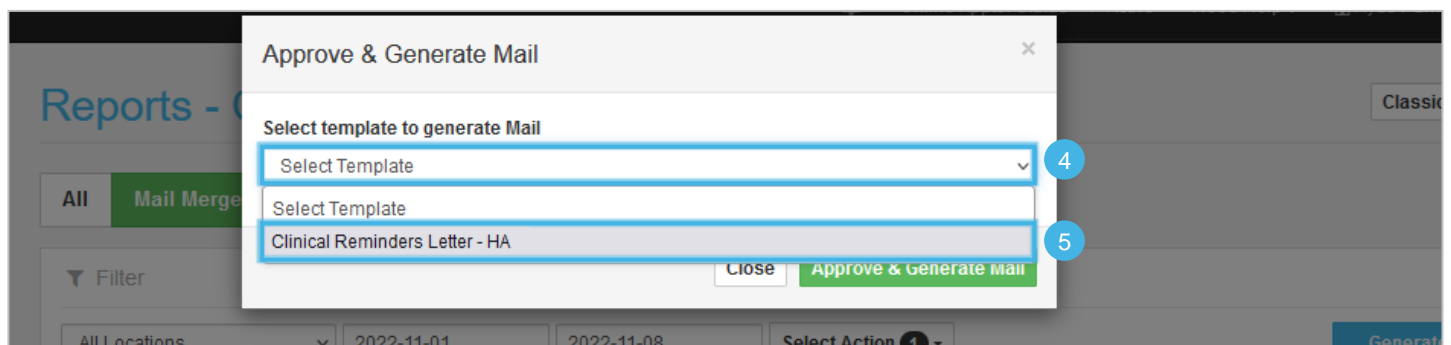


2. Click **Bulk Actions**
3. Select **Approve & Generate Mail**



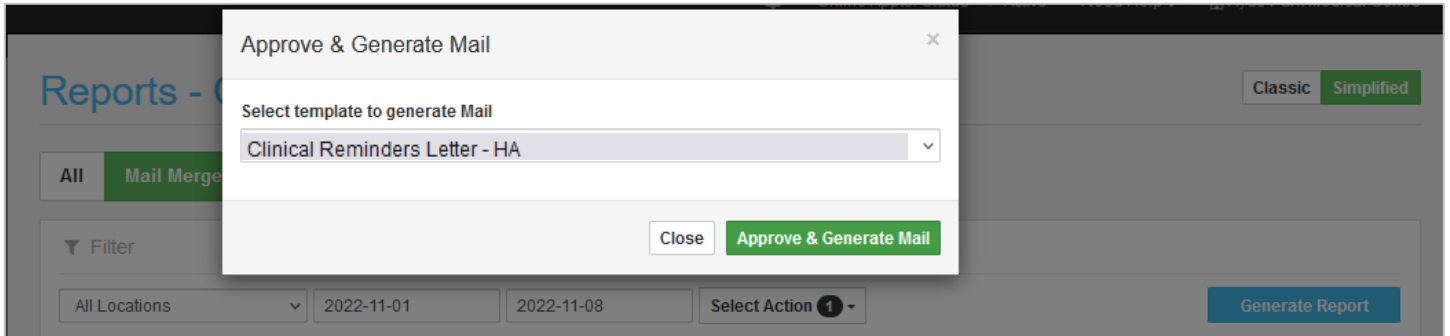
A pop-up will appear:

4. Click the **down arrow** to view your templates
5. Select your **Template**



How to Export a Letter

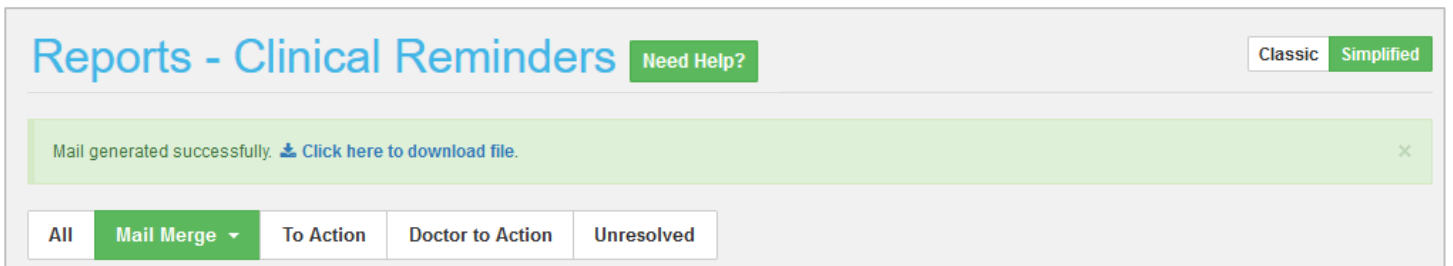
1. Click **Approve and Generate Mail**



The system will start generating the letter.

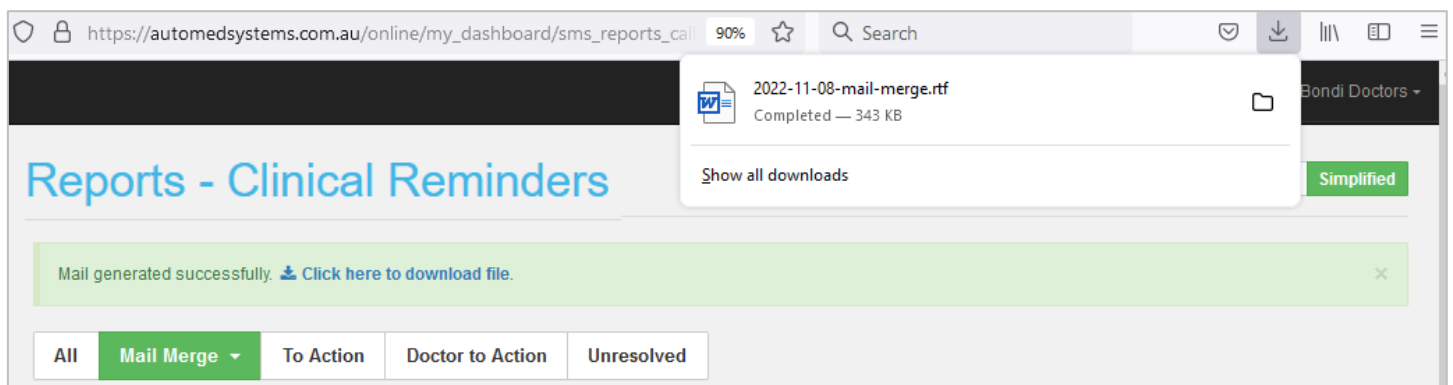
Once the letter is ready, a **green pop-up** will appear instructing to download the letter.

2. Select – **Click here to download the file**

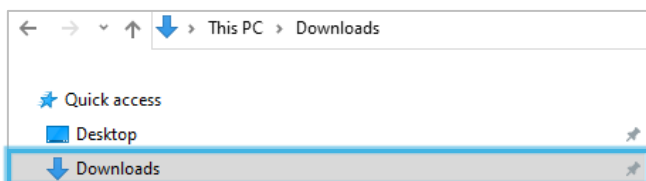


The letter will start downloading:

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

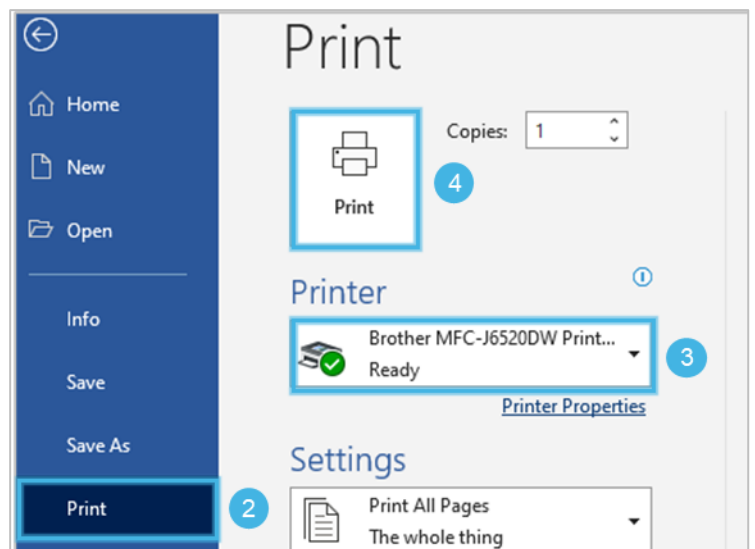
Open the letter once the file has downloaded:

1. Click **File**



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

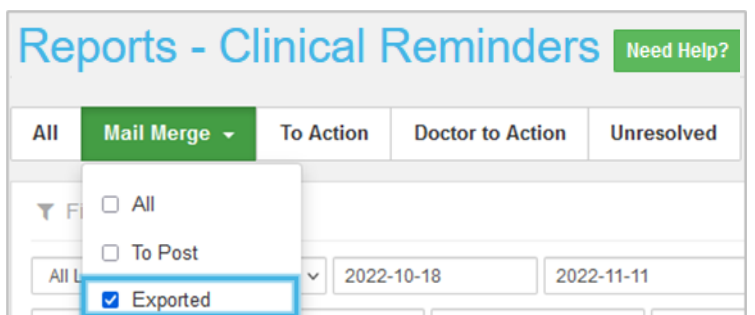
Your letter/s will start printing.



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**

