



Med Software LLC  
Created: 5/1/2011  
Version: 1  
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## Letters User Instruction



In addition to the reporting tools available, you can also print letters from RESource. The letters are generated as Microsoft Word documents that have been merged with patient data from RESource.

These letters are generated and sent out daily:

- **New Patient Letter**

The purpose of the New Patient Letter is to confirm a patient's initial consultation appointment and to provide her with information preparing her for her initial consult. In order for a letter to be generated for a patient, she must have a status of Scheduled and a Scheduled Date matching the criteria entered.

(Specific instructions for generating the letters follow these definitions)

- **Patient Reschedule Letter**

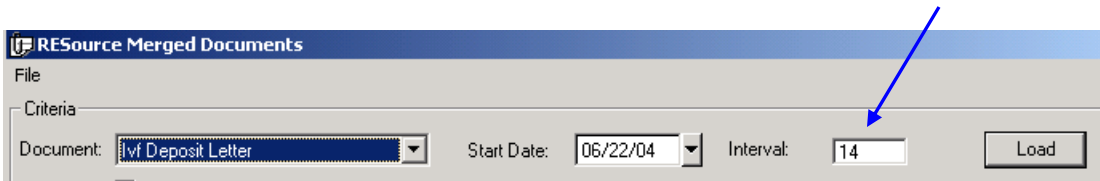
The purpose of the Patient Reschedule Letter is to confirm that a patient has rescheduled her appointment and to remind her of the new appointment information (date, time, office, physician). In order for a letter to be generated for a patient, she must have a status of Rescheduled and a Scheduled Date matching the criteria entered.

- **Referring MD Letter**

The purpose of the Referring MD Letter is to inform a referring physician that his/her patient has made an appointment, and to give that physician a contact name and phone number for the office. These letters can be generated when a new patient is given the status of Scheduled, has a Scheduled Date matching the criteria entered, and has a referring physician indicated in Patient Details (in the Ref By field).

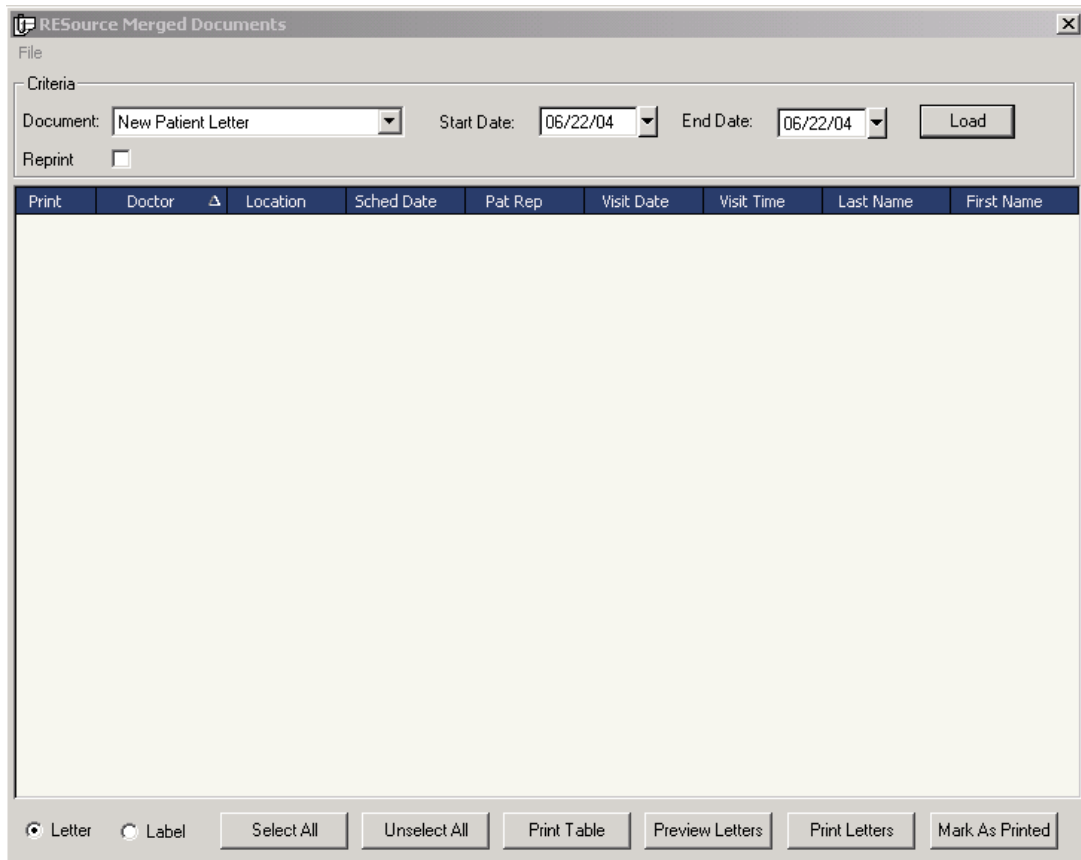
- **IVF Deposit Letter**

The purpose of this letter is to inform the patient of any deposit due to the office prior to starting her IVF cycle. Typically, the finance department will send out this letter. These can be generated for any patient that has a start date scheduled in the IVF Scheduler (the IVF Scheduler is explained in the Clinical section). The Interval field that appears when you choose 'IVF Deposit Letter' determines the day from the specified Start Date that letters should be generated for. For example, if 6/22/04 is selected as the Start Date, and 14 is entered as the interval, patients with an IVF scheduled date of 7/6/04 will appear. The deposit amount due can be altered for any letter. For more information on the IVF Deposit Letter see the Finance section.



To generate and print letters:

1 – go to the Reports option in the main menu and select Letters. The REsource Merged Documents window appears.



2 – select the desired letter from the Document drop down list

3 – enter a Start Date and End Date for the date(s) you wish to print letters for (this will default to the current date). This date corresponds to the Date Scheduled in Scheduling Details (the date the appointment was made, not the date of the actual appointment). So if it is currently the morning of October 11 and you want to pull up all patients who scheduled appointments yesterday, you would enter 10/10 for both dates.

4 – click the Load button. A list of patients will appear.

5 – select either Letter or Label from the options in the lower left corner of the window. Choosing the Letter option will print the actual letter, and Label will print the corresponding address label. You can only choose one option at a time.

6 – assuming you want to print the entire patient list that appears, click the Print Letters button at the bottom of the window (if you selected to print labels, the button will read Print Labels). If you wish to view the letters before printing, click the Preview Letters button (or Preview Labels).

You will notice other options besides Print Letters and Preview Letters at the bottom of the screen:

- **Select All** - selects all patients in the table for printing. By default all are selected – when you select a letter, and the patient list appears you will notice the Print checkbox to the left of each row is already checked.

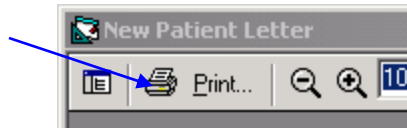
Reprint	
Print	
<input checked="" type="checkbox"/>	Berg
<input checked="" type="checkbox"/>	Berg
<input checked="" type="checkbox"/>	Drev
<input checked="" type="checkbox"/>	Lee
<input checked="" type="checkbox"/>	Lee
<input checked="" type="checkbox"/>	Lee
<input checked="" type="checkbox"/>	Mille
<input checked="" type="checkbox"/>	Scot
<input checked="" type="checkbox"/>	Scot
<input checked="" type="checkbox"/>	Scot
<input checked="" type="checkbox"/>	Scot
<input checked="" type="checkbox"/>	Slow
<input checked="" type="checkbox"/>	Slow

- **Unselect All** - unselects all patients in the table for printing. You would use this feature, for example, if you had 20 patients listed in the table and only wanted to print a couple of the letters. You would click Unselect All and then manually check off the ones you want.

Print	
Print	
<input type="checkbox"/>	Ber
<input type="checkbox"/>	Ber
<input type="checkbox"/>	Dre
<input checked="" type="checkbox"/>	Lee
<input type="checkbox"/>	Lee
<input type="checkbox"/>	Lee
<input type="checkbox"/>	Mille
<input type="checkbox"/>	Sco
<input type="checkbox"/>	Sco
<input type="checkbox"/>	Sco
<input type="checkbox"/>	Sco
<input type="checkbox"/>	Slow
<input type="checkbox"/>	Slow

- **Print Table** - prints out the table (the REsource Merged Documents screen). No prompt will appear – the table print out will be sent directly to your default printer.
- **Preview Letters** - loads all letters selected to print and allows you to view them before printing. You can then choose to print directly from the screen that appears by selecting the Print button in the upper left corner. Note that you cannot edit the letters from this window. Remember that the specific patient data (such as name, appointment date/time, physician)

comes directly from RESource – if there is an error with the patient data in the letter, it must be corrected in RESource.



- **Print Letters** - prints the letters
- **Mark as Printed** – clicking this button will change the selected patients' status to Patient Letter Printed. This is an optional feature - check with your supervisor to see if your department is using it.

### Reprinting Letters

Once printed, the letters will no longer appear when you click the Load button (for the same letter type and date range). If you need to view what letters were printed, or need to reprint any of the letters, select the Document and date range, then check off the Reprint checkbox before clicking the Load button.

