

# CREATING AND CUSTOMIZING PATIENT LETTERS

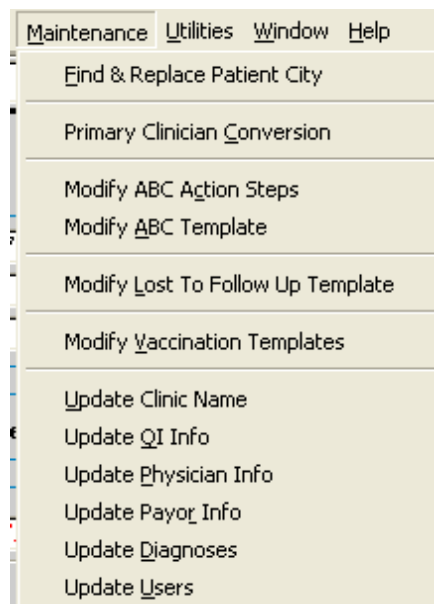
## Modifying Text Permanently

The text of the ABC or Vaccination letters may be permanently modified by selecting the Maintenance menu option and going to the appropriate template.

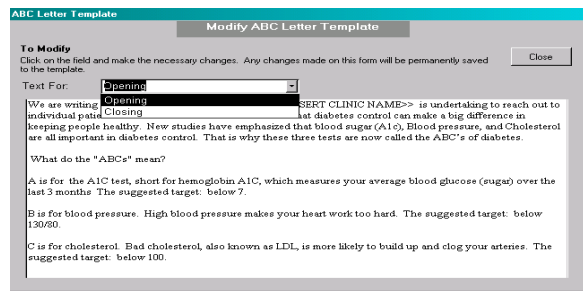
### ABC Letter

#### *Make permanent changes to Opening/Closing Text*

- Select Modify ABC Template under the Maintenance menu.

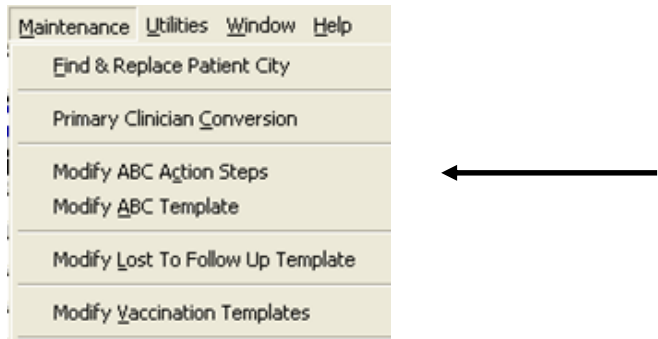


- From the drop-down box, select the letter type that is to be changed. Then, make the modifications, and close the window. **Do not forget to add the name and contact number for your specific clinic.**



**Make permanent changes to ABC Action Steps**

- Select Modify ABC Action Steps under the Maintenance menu.



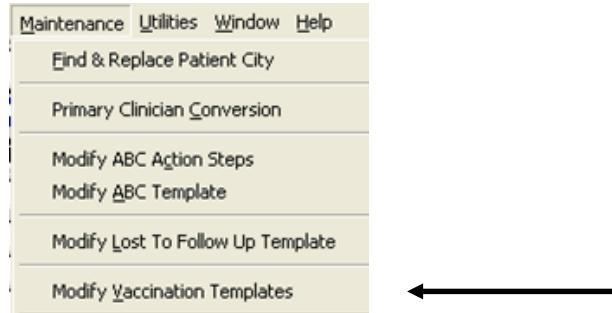
- Make permanent changes to any or all of the action steps. The text for each action step is restricted to 60 characters (including spaces & punctuation). A maximum of seven actions steps is allowed.

A screenshot of a dialog box titled 'Edit ABC Actions'. Inside the dialog, there is a sub-header 'Edit ABC Action Steps' and a message: 'Modifications to the actions steps are permanent. You may have a total of seven (7) action steps.' A 'Close' button is located to the right of the message. Below the message, there is a section titled 'Action Steps' which contains a list of text input fields. The first field contains the text 'Get physical activity every day'. The other fields contain: 'Take medications as prescribed', 'Follow a healthy meal plan', 'Stop smoking -- ask your provider for help', 'Check your blood sugar as suggested by your provider', and 'Stay at a healthy weight'. There is an empty field at the bottom of the list.

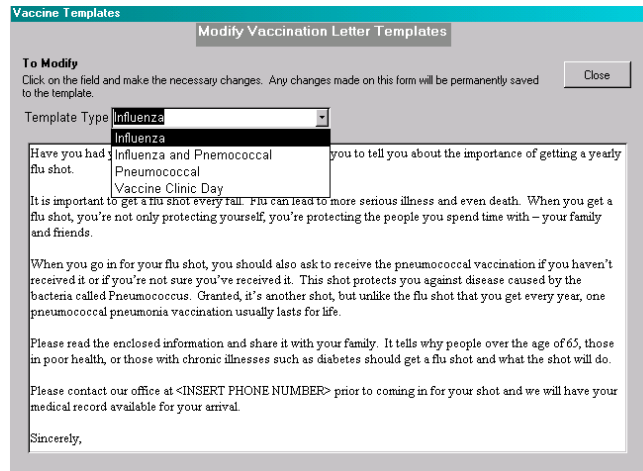
## Vaccination Letters

### ***Make permanent changes to Vaccination Text***

- Select Modify Vaccination Templates under the Maintenance menu.

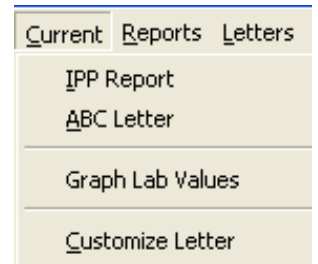


- From the drop-down box, select the vaccination letter that is to be changed. After the modifications, select another letter from the Template Type or close the window.

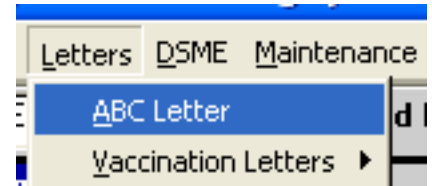
A screenshot of a window titled 'Vaccine Templates' with a sub-header 'Modify Vaccination Letter Templates'. The window contains a 'To Modify' section with instructions: 'Click on the field and make the necessary changes. Any changes made on this form will be permanently saved to the template.' There is a 'Close' button. Below this is a 'Template Type' dropdown menu currently showing 'Influenza'. A dropdown list is open, showing options: 'Influenza', 'Pneumococcal', and 'Vaccine Clinic Day'. The main text area contains a template for an influenza vaccination letter, starting with 'Have you had influenza and Pneumococcal flu shot.' and ending with 'Sincerely,'.

# Modifying Text Temporarily

**Customizing Letters** – Customize Letters allows a user to temporarily change the text of ABC Letter or Vaccination Letter by cutting and pasting or create a user-specific letter for the current patient only.. To open the form, click Current and then Customize Letter.



**ABC Letter** – Select ABC Letter under the Letters menu to temporarily change the text of ABC Letter or Vaccination Letter.



## Selecting ABC Criteria and Customizing Text

The selection criteria at the top of the form are similar to those on the PPP form. Select a particular age group, office visit date range, and/or a physician. Any changes made to the opening text, closing text, or the Action Steps on this form are temporary and will be in effect for the selected population.

- Age (years) – to customize a query, select the age range for patients to be included.
- Office visit – to customize a query, select a date range. Then, only patients who had one or more office visits during that time period will be included in the query.

- Physician – to customize a query, select a particular physician name. Then, only that physician’s patients will be included in the query.
- Signatures – In order to modify the way a physician signature (name) appears, click the box next to the "Modify signatures." **Note that for a signature to appear on the letter, the signature line for the physician name must be filled in.** This feature is also available by selecting Update Physician Info under the Maintenance menu option.

Last Name	First Name	MI	Signature
GREY	MEREDITH		Meredith Grey M.D.
HOUSE	GREGORY		Gregory House MD
HOWSER	DOOGIE		Doogie Howser MD
ME	ASLDFKJLKJ		

- Customize opening text – The text defaults to the opening text for the ABC template. Any changes made to the opening text in this part of the DQCMS program will be valid for the current session only.
- Select ABC Criteria – The ABC items in this box will default to “all.” The customized choices are all, <, or =>. If < or => are chosen, the value box will be visible, defaulting to the ADA clinical recommendations. The values may be changed to further stratify your patient population.
- Select Action Steps – Seven ABC Action steps are available:
  - Checkbox – All seven boxes are checked by default. Unclick the box next to any step that you do NOT want to include in the customized letter.
  - Action Step Text – The action step text defaults to the ABC Action Steps template. Any or all of the steps may be customized here for the current session. There is a 60-character limit for each step.
- Customize closing text – This text defaults to the closing text for the ABC template. Any changes made will be valid for the current session only.

## Printing ABC Letters/Labels

- ABC Letters – When selecting criteria and customizing text is complete, click the View Letter button to preview your letters. Margins may be adjusted by selecting Page Setup under the File menu. **To print letters or labels go to File on menu bar, then click Print.**

The screenshot shows the 'ABC Selection Criteria' dialog box. It includes fields for 'Age (years)', 'Physician', 'Office Visit', and 'Signature'. A 'View Letter' button is circled in red. Below the fields is a text area for 'Customize opening text' containing a sample letter template.

- ABC Labels – When selecting criteria and customizing text are complete, select the desired label size from the drop-down box. The labels will preview for review. The label numbers correspond to Avery label products.

This screenshot shows the same 'ABC Selection Criteria' dialog box, but with the 'Labels' dropdown menu open. The menu lists four options: 5095, 5160, 5161, and 5162. The dropdown menu is circled in red.

**Vaccination Letters** – Select the type of vaccination letter under the Vaccination Letters option of the Letters menu.

The screenshot shows the application's menu bar with 'Letters', 'DSME', 'Maintenance', 'Utilities', 'Window', and 'Help'. The 'Letters' menu is open, showing 'ABC Letter', 'Vaccination Letters', and a list of vaccination types: 'Flu Only', 'Flu (had Pneumococcal)', 'Pneumococcal Only', 'Pneumococcal (had Flu)', 'Flu and Pneumococcal', and 'Vaccination Clinic'. The 'Vaccination Letters' option is highlighted with a blue arrow.

## Selecting Vaccination Criteria and Customizing Text

Any changes made to the text on this form are temporary. To make permanent changes, select **Modify Vaccination Templates** under the **Maintenance** menu option.

The screenshot shows a window titled "FLU TEMPLATE" with a sub-header "Customize Flu Letter". It features a "To Modify" section with instructions, a "Physician" dropdown menu, a "Signature" text field, a "Modify physician signatures" checkbox, and a "Labels" dropdown. Below these are "View Letter" and "Close" buttons. The main content area contains a flu letter template with the following text:

Have you had your flu shot this year? We are writing to you to tell you about the importance of getting a yearly flu shot.

It is important to get a flu shot every fall. Flu can lead to more serious illness and even death. When you get a flu shot, you're not only protecting yourself, you're protecting the people you spend time with – your family and friends.

When you go in for your flu shot, you should also ask to receive the pneumococcal vaccination if you haven't received it or if you're not sure you've received it. This shot protects you against disease caused by the bacteria called Pneumococcus. Granted, it's another shot, but unlike the flu shot that you get every year, one pneumococcal pneumonia vaccination usually lasts for life.

Please read the enclosed information and share it with your family. It tells why people over the age of 65, those in poor health, or those with chronic illnesses such as diabetes should get a flu shot and what the shot will do.

Please contact our office at <INSERT PHONE NUMBER> prior to coming in for your shot and we will have your medical record available for your arrival.

Sincerely,

- **Physician** – To send letters to patients of a particular physician, select that physician's name. If this field is left blank, all physicians are included.
- **Modify signatures** – To modify the way a physician's signature (name) appears, click this box to open a form for modifying physician signatures. This feature of modifying signatures (name) is also available by selecting **Update Physician Info** under the **Maintenance** Menu option.

The screenshot shows a window titled "Update Physician Information". It contains instructions for "To Add", "To Modify", and "To Delete". Below the instructions is a table with the following columns: Last Name, First Name, MI, and Signature.

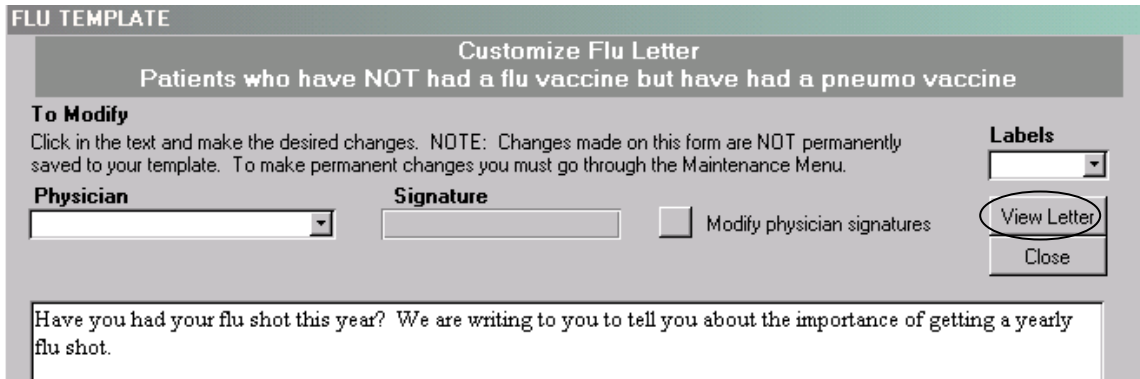
Last Name	First Name	MI	Signature
FORD	JAKE		Jake Ford, MD
HOWSER	DOUG		Doug Howser, MD, PhD
JEFFERS	THOMAS		Tom Jeffers, PA, LPN
*			

At the bottom, there is a "Close" button and a record indicator: "Record: 1 of 3".

- **Customize text** – The text defaults to the permanent text on file. The text may be customized here. Any changes made will be valid for the current session only.

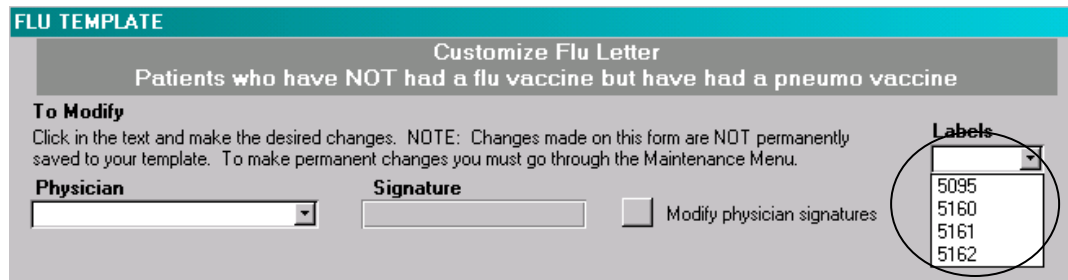
## Printing Vaccination Letters/Labels

- Vaccination Letters\* – When selecting criteria and customizing text are complete, click the View Letter button to preview the letters that are now ready to be printed. Margins may be adjusted by selecting Page Setup under the File menu. **To print letters or labels go to File on the Menu bar, then click Print.**



The screenshot shows a web interface titled "FLU TEMPLATE" with a sub-header "Customize Flu Letter" and a subtitle "Patients who have NOT had a flu vaccine but have had a pneumo vaccine". Under "To Modify", there is a text box with instructions: "Click in the text and make the desired changes. NOTE: Changes made on this form are NOT permanently saved to your template. To make permanent changes you must go through the Maintenance Menu." Below this are fields for "Physician" (a dropdown menu) and "Signature" (a text input), along with a checkbox labeled "Modify physician signatures". On the right side, there is a "Labels" dropdown menu, a "View Letter" button circled in red, and a "Close" button. At the bottom, a text area contains the text: "Have you had your flu shot this year? We are writing to you to tell you about the importance of getting a yearly flu shot."

- Vaccination Labels – When selection criteria and customizing text are complete, select the desired label size from the dropdown box. The labels will preview for review. The label numbers correspond to Avery label products.



This screenshot is similar to the one above, but the "Labels" dropdown menu is open, showing a list of label numbers: 5095, 5160, 5161, and 5162. The dropdown menu is circled in red.

\*Letterhead stationary – the margins of the document can be modified to accommodate letterhead stationary. Select File, go to Page Setup and increase or decrease the page margins accordingly.