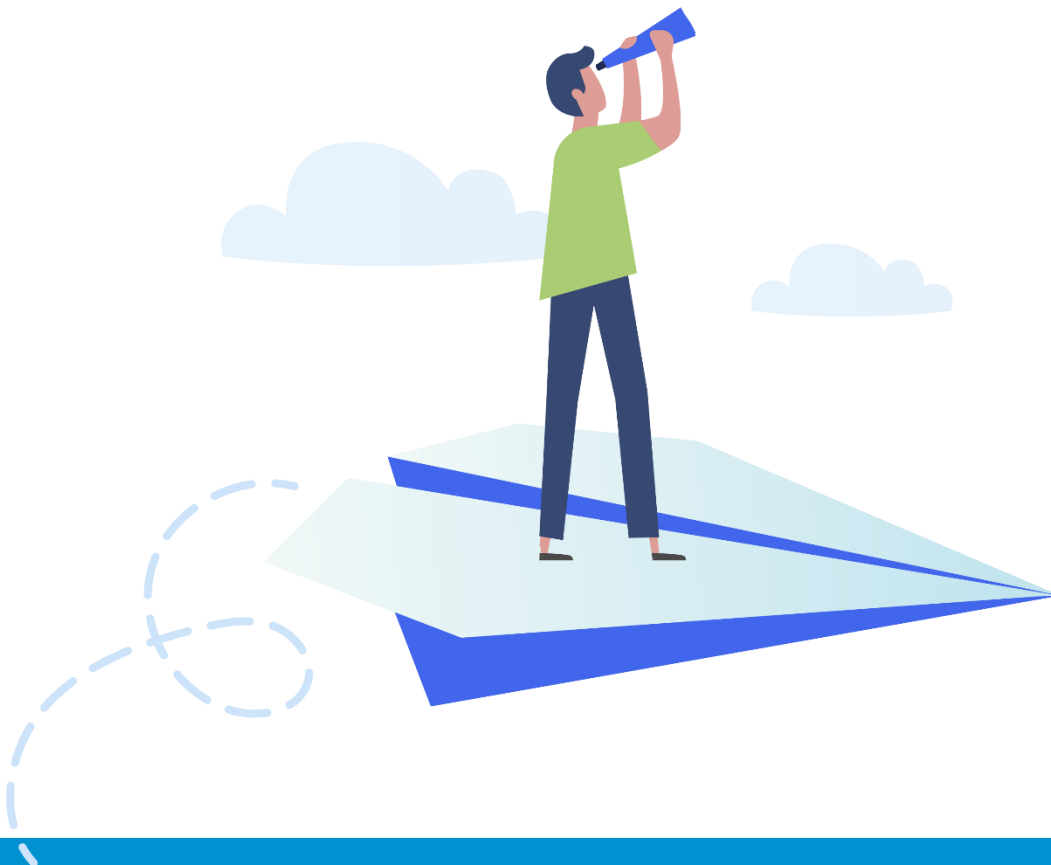




Word Processor User Guide

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Welcome to Vision Word Processor

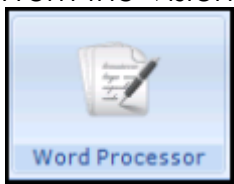
You can set up mail merge templates from the Vision 3 Word Processor module. This enables you to create letters from your patient's record with specified information populated automatically.

- First select whether **Word** or **Vision Editor** is the default word processor, see [Selecting your Word Processor](#) on page [4](#).
- Next create the template letter, for example, for recalls or referrals, see [Setting Up Template Letters](#) on page [5](#).
- From **Consultation Manager**, you can then attach an individual letter to a patient record.
- When you merge a template letter with a group of patients in **Patient Groups**, you have the opportunity to view and edit the letter before printing.

Selecting your Word Processor

To select the type of word processor to use:

1. From the Vision 3 front screen, select Options - Setup - Word Processor

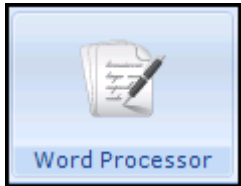


2. Select either:
 - **Vision Editor** or
 - **Microsoft Word 6.0 (or above)**.
3. Select **OK** to save.

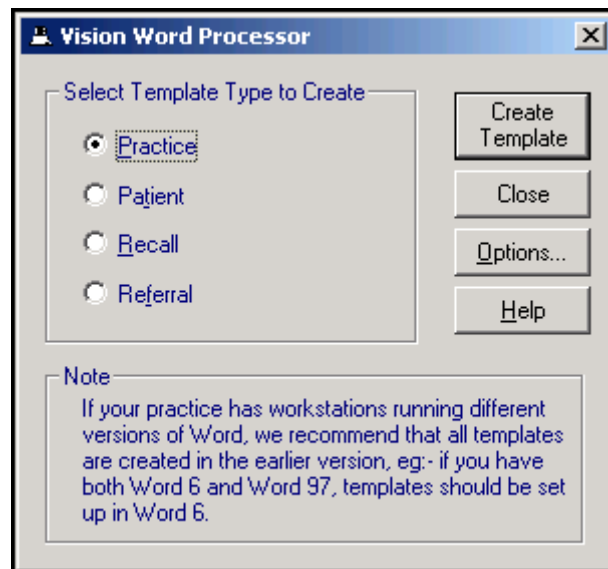
Setting Up Template Letters

To create a template:

1. From the **Vision 3 front screen**, select **Utilities - Word Processor**



2. The **Vision Word Processor** screen displays. You are reminded that if your practice is running different versions of **Word**, that all templates should be created in the earliest version:




3. Select **Options** to select the fields to be merged if you choose merge fields for Repeats, Allergies, Medical History and Problems, see [Options for Repeats, Allergies, Histories and Problems Merge Fields](#) on page [14](#) for details.
4. Select the template type required:
 - **Practice** - See [Practice](#) on page [8](#) for merge field details.
 - **Patient** - For a template including practice and patient merge fields, see [Patient](#) on page [9](#) for merge field details.
 - **Recall** - For a template including practice, patient, and recall merge fields, see [Recall](#) on page [11](#) for merge field details.
 - **Referral** - For a template including practice, patient and referral merge fields, see [Referral](#) on page [11](#) for merge field details.
5. Select **Create Template**.
6. A new document is opened ready for you to create your template. Design your template as required utilising the **Insert Merge Field** option as required, see [Merge Fields](#) on page [8](#) for details.



Remember - Place a single space between merge fields, such as Patient Surname (space) Forename.

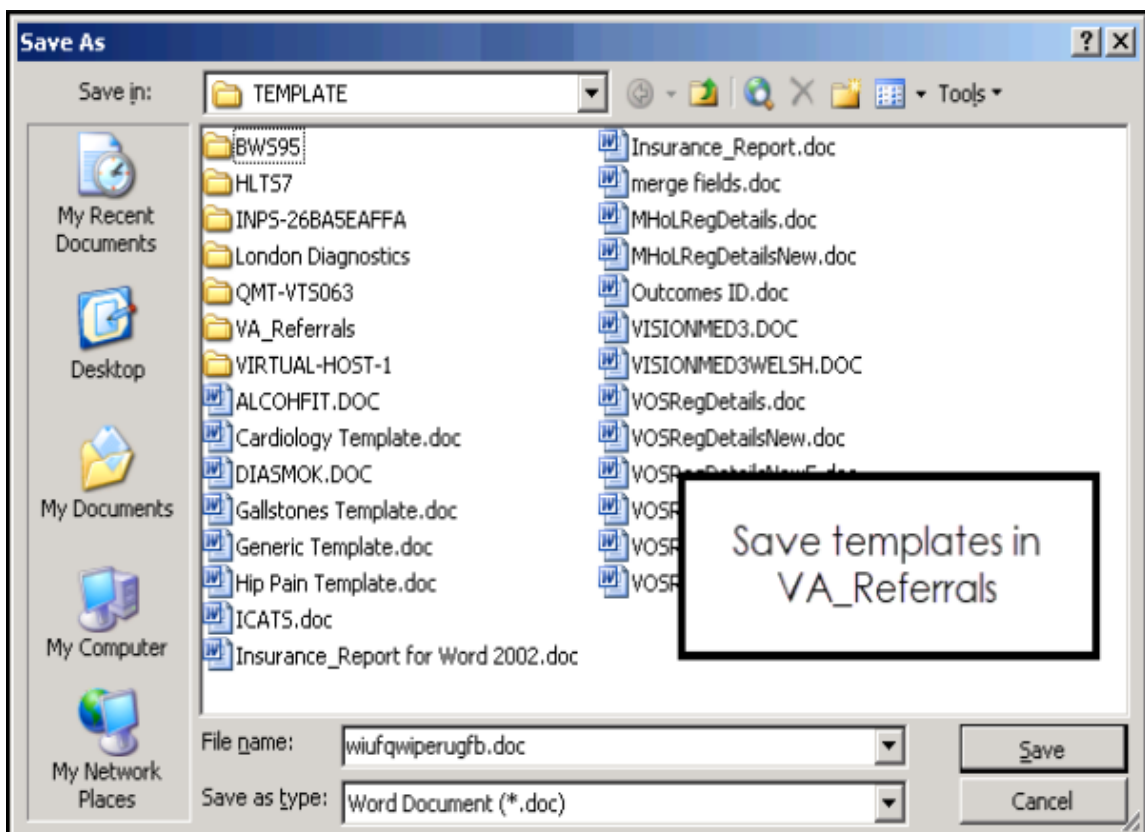


Important - To comply with GDPR and best practice, we highly recommend you add a disclaimer to any reports or letters you produce from your Vision system, for example, *'This document may contain sensitive or confidential data, please treat accordingly'*.

- It is recommended you 'save as you go' when creating a new template, select **Save** .
- Enter a filename and select a directory. Vision automatically saves all template letters in P:\WORDPROC\TEMPLATE\, if you want to access a template from **Vision Anywhere**, you need to create a VA_Referrals file within P:\WORDPROC\TEMPLATE\ and save it there.



Important - Some merge fields within a Vision Anywhere template, do not work in Vision 3 and return a **'Error! Bookmark not defined'** message.





Training Tip - To create a VA_Referral folder, simply right click in **Save As**, select **New - Folder** and name the folder **VA_Referrals**.

9. Select **OK** to save.



Remember - Save your template at regular intervals while you are creating it, and especially before you exit.

Merge Fields

Select the following link to view the merge fields available:

- [Practice](#) on page [8](#)
- [Patient](#) on page [9](#)
- [Recall](#) on page [11](#)
- [Referral](#) on page [11](#)

 **Important** - Some **Vision 3** merge field are not available within **Vision Anywhere**, see [Creating Letter Template](#) for details if required.

Practice

If you select to create a Practice letter, the following merge fields are available:

- SYSTEM_Date - Today's date is inserted.
- PRACTICE_Name.
- PRACTICE_House.
- PRACTICE_Road.
- PRACTICE_Locality.
- PRACTICE_Town.
- PRACTICE_County.
- PRACTICE_Postcode.
- PRACTICE_BlockAddress - All the lines of the practice address: House name, Number and Road, Locality, Town, County, Postcode.
- PRACTICE_Main_Comm_No - The practice's main phone number under **Main Address** in **Practice Details - File Maintenance - Control Panel**.
- PRACTICE_Fax_No.

Patient

If you select to create a **Patient letter**, the following merge fields are available, as well as those listed in [Practice](#) on page [8](#):

- PATIENT_Title.
- PATIENT_Forename1.
- PATIENT_Forename2 - If entered in Registration.
- PATIENT_Surname.
- PATIENT_Sex.
- PATIENT_Date_of_Birth.
- PATIENT_Current_NHS_Number - The patient's current NHS number.
- PATIENT_New_Format_NHS_Number - The new format NHS number; often the same as the Current NHS number.
- PATIENT_Old_Format_NHS_Number - If entered on Registration.
- PATIENT_CHI_Number.
- PATIENT_Registered_GP.
- PATIENT_Reg_GP_GMP_Code.
- PATIENT_Reg_GP_PPA_Code.
- PATIENT_Usual_GP - The GP that the patient usually sees, may differ from registered GP; must be entered in Usual GP in Registration.
- PATIENT_Additional_ID - Allocated to patients during data conversion to Vision 3 or practice defined.
- PATIENT_Previous_Surname - If entered in Registration.
- PATIENT_NHS_Number_No_Spaces - The patient's NHS number without spaces.
- PATIENT_Age.
- PATIENT_House.
- PATIENT_Road.
- PATIENT_Locality.
- PATIENT_Town.
- PATIENT_County.
- PATIENT_Postcode.
- PATIENT_BlockAddress - All the lines of the practice address: House name, Number and Road, Locality, Town, County, Postcode.
- PATIENT_Main_Comm_No - The phone number at the patient's main address, recorded with the type of contact - Telephone home.

- PATIENT_Alt_Comm_No - The patients work number, recorded with the type of contact - Telephone - business. This must be added to the contacts for patient, on the Address tab in Registration.
- PATIENT_Mobile_No.
- PATIENT_Height - The last height record.
- PATIENT_Weight - The last weight record.
- PATIENT_BMI - The last BMI calculation - BMI Read codes are not included.
- PATIENT_BP - The last blood pressure record.
- PATIENT_Smoking - The last smoking status record into the template letter.
- PATIENT_Alcohol - The last alcohol record into the template letter.
- PATIENT_LMP - The LMP must be entered into the LMP SDA for this to populate.
- PATIENT_EDD - The EDD must be entered in the EDD SDA for this to populate.
- PATIENT_Pregnant - This inserts a **Y** (Yes) when a Maternity Plan is added using the Maternity SDA.
- PATIENT_Total_Cholesterol - The last total cholesterol record is added from the Cholesterol SDA.
- PATIENT_HDL - The last HDL record is added.
- PATIENT_LDL - The last LDL is added.
- PATIENT_Triglycerides - The last Triglyceride result is added.

Recall

If you select to create a **Recall**, the following merge fields are available, as well as those listed in [Practice](#) on page [8](#) and [Patient](#) on page [9](#):

- RECALL_Date.
- RECALL_Reason - The Read description entered on the **Recall - Add** screen.
- RECALL_Clinician - The GP creating the recall.
- RECALL_Recalling_GP_GMP_Code - The GMP code of the GP making the recall.
- RECALL_Reg_GP_GMP_Code - The GMP code of the registered GP with whom the recall patient is registered.
- REPEATS - The patient's repeat masters.
- DRUG_ALLERGY - The patient's drug allergies.
- MEDICAL_HISTORY- The patient's medical history by priority set up in [Options for Repeats, Allergies, Histories and Problems Merge Fields](#) on page [14](#).
- PROBLEMS - The patient's active problems.
- CURRENT_CONSULTATION - Data in the current open consultation.

Referral

If you select to create a Referral, the following merge fields are available, as well as those listed in [Practice](#) on page [8](#) and [Patient](#) on page [9](#):



Remember - Repeats, Drug Allergy, Medical History and Problems are available as merge fields only if selected in [Options for Repeats, Allergies, Histories and Problems Merge Fields](#) on page [14](#).

- REFERRAL_Event_Date - The date on Referral Add.
- REFERRAL_Clinician - The GP making the referral.
- REFERRAL_Read_Term - The Read description on Referral Add.
- REFERRAL_Consultant - The consultation at the hospital or provider to which the referral is made.
- REFERRAL_Consultant_title.
- REFERRAL_Consultant_forename.
- REFERRAL_Consultant_surname.

- REFERRAL_Department - The department at the provider, if entered in Organisations, File Maintenance.
- REFERRAL_Provider - The hospital or provider to which the referral is made.
- REFERRAL_House.
- REFERRAL_Road.
- REFERRAL_Locality.
- REFERRAL_Town.
- REFERRAL_County.
- REFERRAL_Postcode.
- REFERRAL_BlockAddress - The house, road, locality, town, county and postcode of the provider.
- REFERRAL_Action_Date- By default, this is 21 days from the event date on Referral Add.
- REFERRAL_Urgency - If selected on Referral Add.
- REFERRAL_Organisation_code - If entered in Organisations in File Maintenance in Control Panel.
- REFERRAL_Hospital_number - The patient's hospital number, entered in Registration - Identifiers.
- REFERRAL_NHS_speciality.
- REFERRAL_Referring_GP_GMP_code - The GMP code of the referring GP.
- REFERRAL_Referring_GP_PPA_code - The PPA code of the referring GP.
- REFERRAL_Reg_GP_GMP_code - The GMP code of the patient's registered GP.
- REFERRAL_UBRN - The unique booking number used by eReferral referrals.
- REPEATS - The patient's repeat masters.
- DRUG_ALLERGY - The patient's drug allergies.
- MEDICAL_HISTORY - The patient's medical histories; the priorities displayed are selected globally in [Options for Repeats, Allergies, Histories and Problems Merge Fields](#) on page [14](#).
- PROBLEMS - Any active problems.
- CURRENT_CONSULTATION - Data in the current open consultation for the patient.

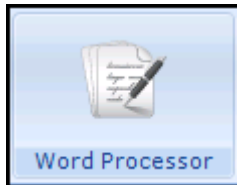
For **Vision Anywhere** referral templates, you can add a REFERRAL_Content merge field, this displays any free text added to the referral:

- Click where you want the merge data to display, press **<Ctrl + F9>** and then type **REFERRAL_Content** between the brackets, **{REFERRAL_Content}**.

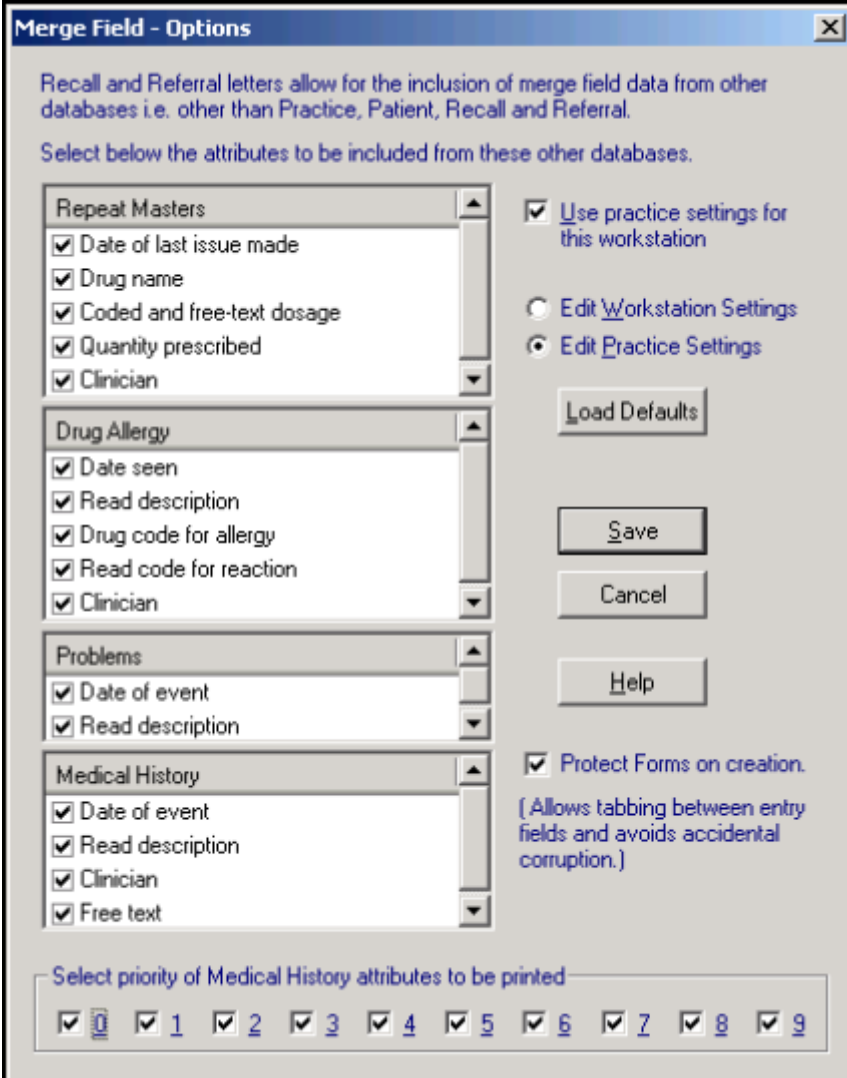
Options for Repeats, Allergies, Histories and Problems Merge Fields

To set which fields are picked up for the merge fields for Repeats, Allergies, Histories and Problems:

1. From the **Vision 3 front screen**, select **Utilities - Word Processor**



2. Select **Options**.
3. The **Merge Field - Options** screen displays:



Merge Field - Options

Recall and Referral letters allow for the inclusion of merge field data from other databases i.e. other than Practice, Patient, Recall and Referral.

Select below the attributes to be included from these other databases.

Category	Attributes
Repeat Masters	<input checked="" type="checkbox"/> Date of last issue made <input checked="" type="checkbox"/> Drug name <input checked="" type="checkbox"/> Coded and free-text dosage <input checked="" type="checkbox"/> Quantity prescribed <input checked="" type="checkbox"/> Clinician
Drug Allergy	<input checked="" type="checkbox"/> Date seen <input checked="" type="checkbox"/> Read description <input checked="" type="checkbox"/> Drug code for allergy <input checked="" type="checkbox"/> Read code for reaction <input checked="" type="checkbox"/> Clinician
Problems	<input checked="" type="checkbox"/> Date of event <input checked="" type="checkbox"/> Read description
Medical History	<input checked="" type="checkbox"/> Date of event <input checked="" type="checkbox"/> Read description <input checked="" type="checkbox"/> Clinician <input checked="" type="checkbox"/> Free text

Use practice settings for this workstation
 Edit Workstation Settings
 Edit Practice Settings

Protect Forms on creation.
 (Allows tabbing between entry fields and avoids accidental corruption.)

Select priority of Medical History attributes to be printed

0 1 2 3 4 5 6 7 8 9


4. These options set which fields are picked up for the merge fields for Repeats, Allergies, Histories and Problems, complete as required:
- **Use practice settings for this workstation** - Tick to use practice settings.
 - **Edit Workstation Settings** – Tick and untick the criteria required for letters created on this workstation and then select Save.
 - **Edit Practice Settings** - Tick and untick the criteria required for letters created across the practice and then select Save.
 - **Load Defaults** - To revert back to the original default settings.
 - **Protect forms on creation** - Tick to protect a document when creating a mail merge from **Referral - Add**. Protecting documents is a feature of Microsoft Word, see Microsoft Word on-screen help for further details.
 - You can tab around a protected form without disturbing the formatting. Protected forms are ideal for forms with tick boxes.
 - You may need to unprotect the form at the time of merging in order to enter free text into free text fields.

Whether **Protect forms on creation** is ticked or not determines whether a merged document, when opening, is protected or not. Once the document is open, you can protect or unprotect the document using the Tools menu or the padlock icon.

Everyone works differently when doing mail merge. If you have referral forms with both free text fields and tick boxes, one suggestion is to untick **Protect forms on creation** on each workstation, then restart Vision 3 for it to be effective. When you mail merge a referral letter, you complete first the unprotected free text fields. You then have two options:

- Select **Tools – Protect**, or the padlock icon, select **Protect Document** and tab to the tick boxes, completing them as relevant and then save.
 - Leave the document unprotected, double click within a tick box that you want to tick. This displays the **Check Box Form Field Options**. Change the **Default value** to **Checked** and select **OK**. Repeat this for every tick box you want to tick and then save.
- **Clinical information** - Tick the items to include them.
 - **Repeat Masters** - Lists the patient's repeat masters. If all ticked, then the Date of last issue made, drug name form and strength, coded and free text dosage, quantity prescribed, and the clinician are included.

- **Drug Allergy** - Lists the patient's allergy records. If all ticked, then the date seen, Read term, drug code for allergy, the optional Read term for Reaction (if used) and the clinician are included.
- **Problems** - Lists the patient's active problems with date of event, and Read description. If you want to omit the Currently Relevant problem which is picked up as an active problem, you would need to go into the patient's Problem list beforehand, right click on Currently Relevant and make it inactive.
- **Medical History** - Lists the patient's **Medical History**. If all ticked, then the **Date of event, Read description, clinician** and **free text** are included. Tick or untick the boxes along the bottom of the screen for each priority in order to include or exclude it.

 **Note** - If you scan letters into **Medical History** rather than correspondence, and if you tick the **Free text** option, then all the text from scanned letters is included, word wrapped. To avoid this, either untick free text so no Comments/free text is included, or untick the priority which you have given scanned correspondence so these are excluded.

5. Select **Save**.

Example of Setting Up a Template

«PRACTICE_Name»
«PRACTICE_Road», «PRACTICE_Town», «PRACTICE_Postcode»
«PRACTICE_Main_Comm_No»

«SYSTEM_Date»

Dear «PATIENT_Title» «PATIENT_Surname»

Enter the details of your letter template here
Additional criteria can be added via Insert Merge Field
|

Yours sincerely

«PATIENT_Registered_GP»

Heading is not required if you are using headed paper

Using **Insert Merge Field** to insert data as required, build your letter template