

How to use the Follow Up Due Report to Create a Mailmerge

What is 'Mailmerge'? The Office 'Mailmerge' facility is a method of taking data you have stored in Excel and using it to populate letters/labels etc. in a Word document – for example to produce a number of copies of the same letter to a list of different people, or create address labels.

By making use of the mailmerge function, you can export the data from the Follow-up Due view on NACR, and create letters or labels to send out your Assessment 2 and/or Assessment 3 questionnaires.

The screenshot shows the NACR Reporting interface. At the top, there is a navigation bar with links: [Add / Search for Patient Record](#), [File Submission Dashboard](#), and [Reporting](#). The [Reporting](#) link is highlighted with a blue arrow pointing to a pink callout box. Below the navigation bar, the 'Reporting' section is displayed, featuring a list of report types: Extract, Activity Report, All Patient View, Missing Key Fields View, Follow Up Due Report, Reason For Not Taking Part Report, Reason For Not Completing Report, Reason For Referral Report, Phase Summary Report, and Wait Time Report. The 'Follow Up Due Report' is highlighted with a blue arrow pointing to a pink callout box. Below the list, the 'Follow Up Due Report' form is shown, containing two dropdown menus: 'Assessment Number: -- Please Select --' and 'Month: -- Please Select --'. A blue arrow points from the 'Follow Up Due Report' callout box to the 'Assessment Number' dropdown. Another blue arrow points from the 'Month' dropdown to a pink callout box. A third blue arrow points from the 'Submit' button to the same pink callout box. The 'Submit' button is located at the bottom right of the form.

National Audit of Cardiac Rehabilitation

[Add / Search for Patient Record](#)

[File Submission Dashboard](#)

[Reporting](#)

Reporting

- > Extract
- > Activity Report
- > All Patient View
- > Missing Key Fields View
- > Follow Up Due Report
- > Reason For Not Taking Part Report
- > Reason For Not Completing Report
- > Reason For Referral Report
- > Phase Summary Report
- > Wait Time Report

Follow Up Due Report

Assessment Number: -- Please Select --

Month: -- Please Select --

Submit

In the NACR database, click on 'Reporting' and then on 'Follow Up Due Report'

You will see the view below. Use the drop down lists to select your Assessment number (2 or 3), and the month ('Outstanding' – ie. all prior to this month; current month; current+ 1 month; or current + 2 months. Click submit.

Important: Assessment Due dates are shown on the Initiating Event record, and are calculated from the Assessment 1 date (so this date needs to be completed for the follow up fields to be shown, and the report to work).

Assessment 2 is due 12 weeks (ie. 84 days) from Assessment 1.

Assessment 3 is due 12 months (ie. 365 days) from Assessment 1.

Assessment 2 due (follow up): 04/08/2013



Assessment 3 due (follow up): 02/05/2014

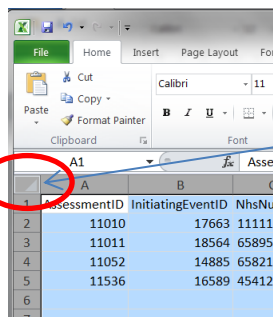


eg.

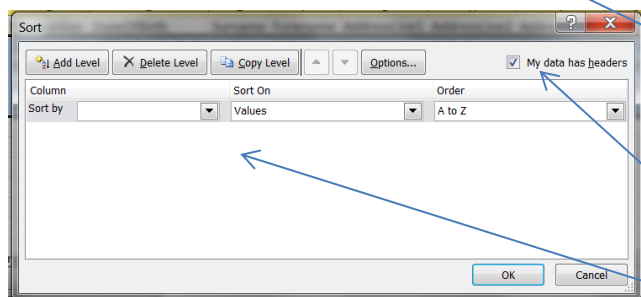
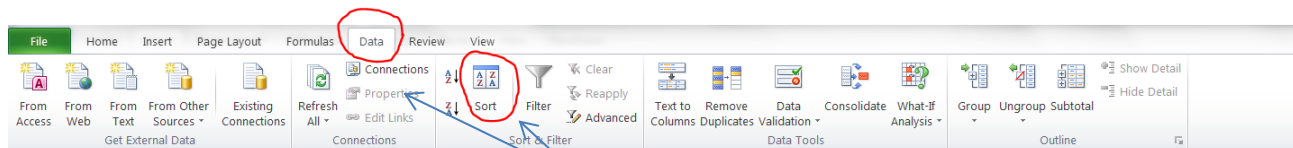
The data will export directly to a csv file, which you can then open in Excel. It will contain the columns/data as shown below.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	AssessmentID	InitiatingEventID	NhsNumber	DateOfBirth	Surname	Forename	AddressLine1	AddressLine2	AddressLine3	Postcode	IEEventType	InitiatingEventDate	AssessmentDate
2	11010	17663	1111111111	10/10/1971 00:00	Smith	John	1 Acacia Aven Holly Estate	York	YO1 1DD	CHD		01/11/2013 00:00	05/11/2013 00:00
3	11011	18564	6589547125	05/08/1959 00:00	Jones	Bob	The Mount	Ravens Road	York	YO13 4FD	MI	02/11/2013 00:00	06/11/2013 00:00
4	11052	14885	6582175555	17/06/1969 00:00	Clark	Philip	54 Trafalgar Road		Scarborough	YO32 4ED	MI	03/11/2013 00:00	07/11/2013 00:00
5	11536	16589	4541221456	12/04/1956 00:00	Phillips	Jane	Piercy House	High Street	Easingwold	YO61 9GH	CHD	04/11/2013 00:00	08/11/2013 00:00

You may want to use all the patients listed in the spreadsheet – in which case, save the file with a recognisable name (eg. today's date, or the month you're following up for example). If you only want to use some of the data, then remove the data you don't want (you can sort by any column, if necessary), and save the file accordingly. See details of how to sort the data below:



Highlight all the data in the spreadsheet by clicking on the top LH corner.



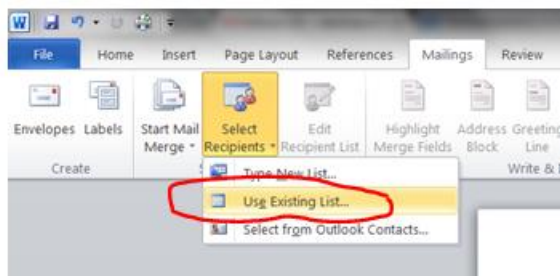
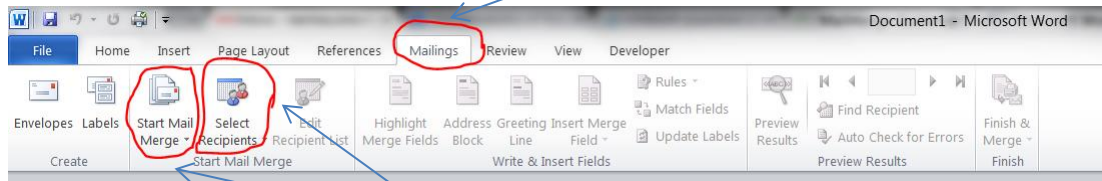
*Click on the 'Data' tab, then on 'Sort'.
The box shown here will appear. Make sure you have ticked 'My data has headers', and select the column and order you wish to sort on. Click OK.
You would also use Data and Sort in older Office versions eg 2003 – they may look slightly different, but work the same way.*

*Delete the patients you don't want to use (or copy the ones you do into a new document, with the header row).
Save the file you want to use for the follow up letters/labels using a file name that makes it easy to find/identify.*

**NOW CLOSE THE EXCEL FILE
(MAKE SURE YOU'VE SAVED
IT!!).**

**OPEN A BLANK (NEW) WORD
DOCUMENT**

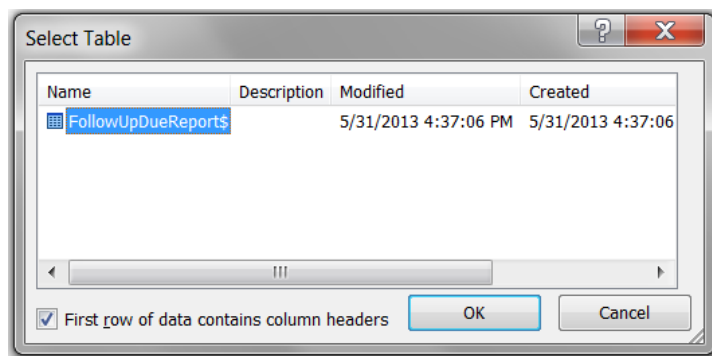
In your new, blank Word document click on 'Mailings'.



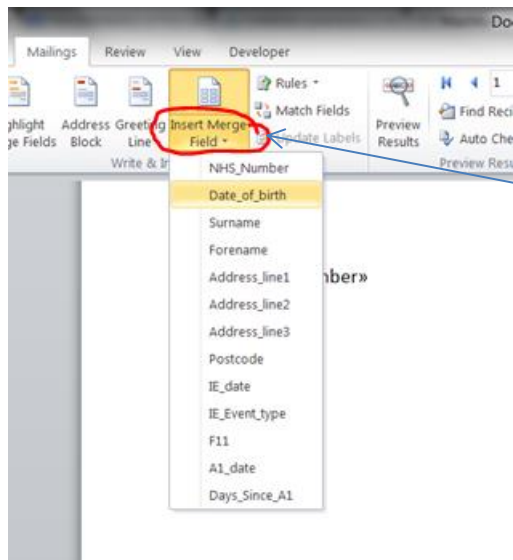
Click on Start MailMerge - select 'Letter' and make sure you have 'Show Mail Merge Toolbar' selected) and then Select Recipients .

(This guide will show you how to create a mailmerge 'Letter' – you could select 'Labels' instead and follow similar instructions to insert the data. There's also a Wizard that will talk you through the process if you prefer – the guidance here doesn't use the Wizard).

Select your saved Excel file containing your patients.



You will get a box similar to the one here – it may have more than one 'sheets' on it (if so, your data will be on Sheet 1). Click OK



Click on Insert Merge Field (the writing with the arrow, not the top of the box with the picture) – you will get a list of fields from your document. Select each, one by one that you want to include in your letter (or on your label).

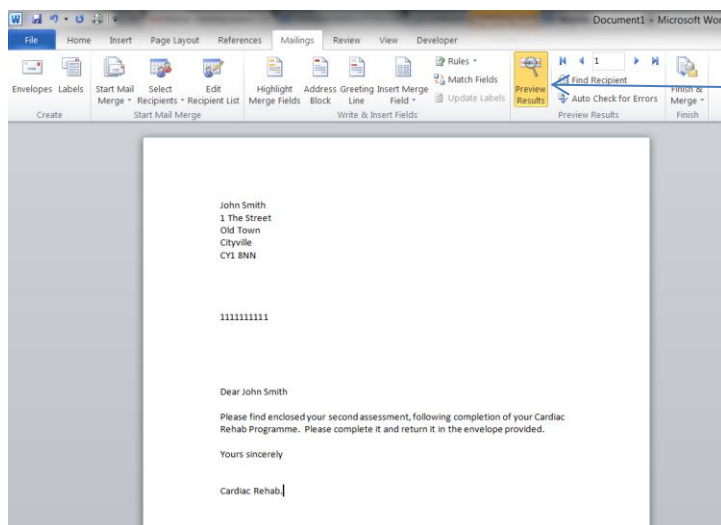
«Forename» «Surname»
 «Address_line1»
 «Address_line2»
 «Address_line3»
 «Postcode»

«NHS_Number»

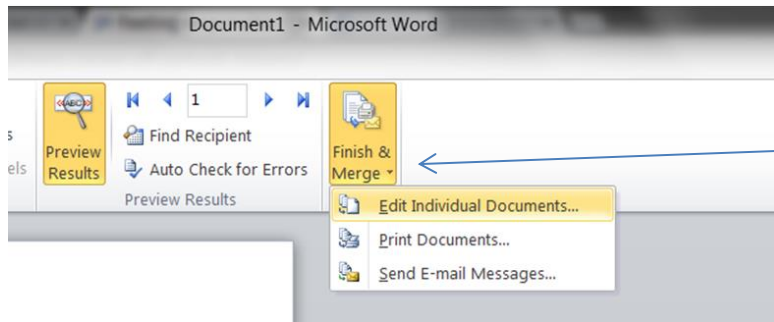
Dear «Forename» «Surname»

Please find enclosed your second assessment, following completion of your Cardiac Rehab Programme. Please complete it and return it in the envelope provided

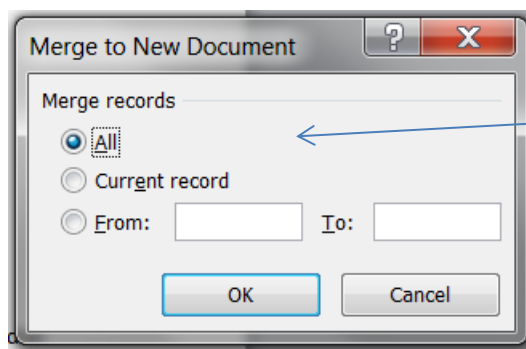
Make sure the fields are formatted OK – ie. in the right place, with spaces/line breaks etc in the right places.



Click on 'Preview Results' and you'll see what your letter looks like. Make sure the merge fields are formatted correctly (eg. A space between forename and surname), and the letter is how you want it. Make sure you click Preview Results again to take you back to your template to make any changes.



Then, when you're happy with the document, click on 'Finish and Merge' and select 'Edit Individual Documents'



You can select if you want to merge the letters for all the patients in the spread sheet, the current record, or a selection (from/to). Click on OK.

John Smith
1 The Street
Old Town
Cityville
CV1 8NN

1111111111

Dear John Smith

Please find enclosed your second assessment, following completion of your Cardiac Rehab Programme. Please complete it and return it in the envelope provided.

Yours sincerely

Cardiac Rehab,

All your patient names/addresses (or those you've selected) will be merged into letters, in a new file. You can then print and/or save them as you would a normal Word document.

«Forename» «Surname»
«Address_line1»
«Address_line2»
«Address_line3»
«Postcode»

«NHS_Number»

Dear «Forename» «Surname»

Please find enclosed your second assessment, following completion of your Cardiac Rehab Programme. Please complete it and return it in the envelope provided.

Yours sincerely

Cardiac Rehab

And you can go back to your template and save that for future use.

When you want to use the template again:

- *Run the Follow Up Due Report as before*
- *Save the data you want to use in an Excel file, with a name so you know what it is, and the date of the mailmerge, for example*
- *Close it, and open the Word Template you have created and want to use.*

NB: *The Word Template will automatically connect to the Excel file of name/address data **that you used the last time**. So make sure you click on Mailings/Select Recipients, and find your new file before you run your letters, so you use the correct list of patients.*