

2023

SystemOne Creating Letters

USER GUIDE

PRIMARY CARE SYSTEMS TEAM

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Introduction

This user guide is aimed at providing staff with an understanding of creating Word letters within SystemOne. Staff will still require specific role-based training and this is highly recommended.

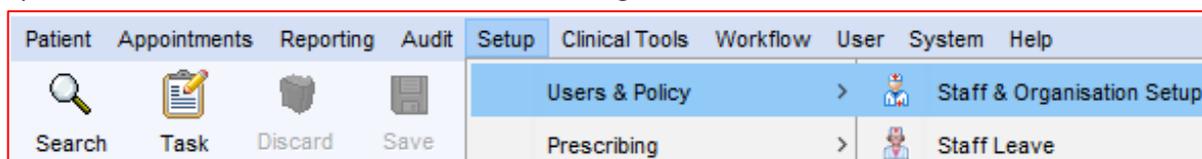
It is the legal responsibility to protect patient confidentiality. The responsibility for safeguarding and using confidential information appropriately rests with each organisation.

By extracting details from the patient record on SystemOne and adding them to a mail merge letter template you have created in Microsoft Word, you will be able to quickly generate standard letters for your patients. Although you may need to spend a few minutes setting up the letter templates, you will only have to do this once.

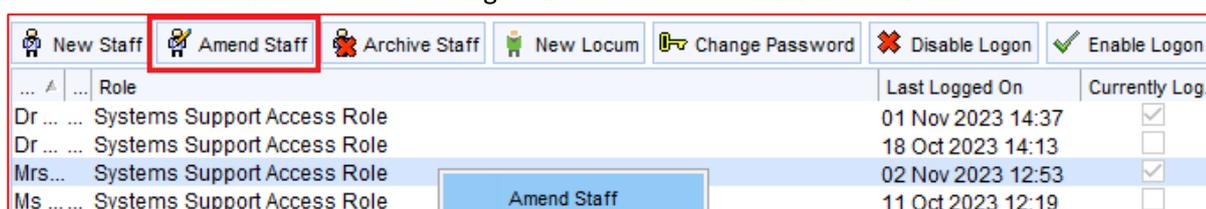
Users must have the SystemOne Administration 'Template Manager' Local Access Right to be able to manage recalls.

To view the Staff & Organisation Setup screen, from the **Main Menu**, navigate to **Setup>Users & Policy>Staff & Organisation Setup**

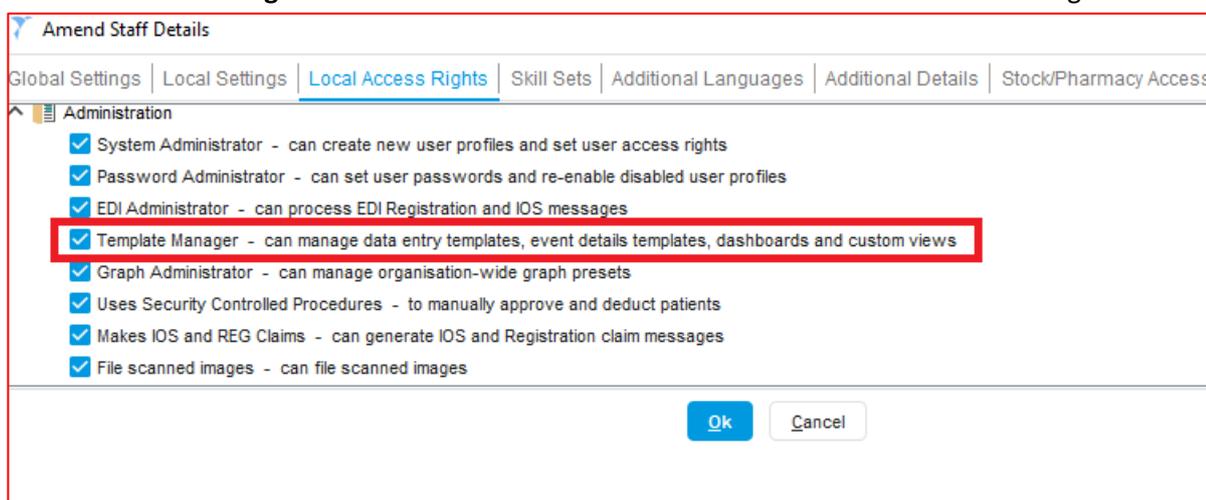
System Administrators can use this screen to manage staff details.



Select the staff member from the list. Right click or click on the **Amend staff** tab



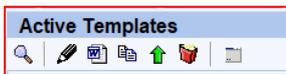
Select **Local Access Rights** and scroll to **Administration** to view and amend local access rights



1. Viewing the Word Letter Templates Screen

- From the **Main Menu**, navigate to **Setup>Referrals and Letters>Word Letter Templates**
- The **Active Templates** Tree in the left-hand pane will display all the letters under different categories (folders) currently available to use in your organisation. Some of these will be ones created and published by NWL and may not have been created by you. *Show the Maida Vale folder which will be used for the training today*
- You can expand and collapse each category by clicking on the arrow to the left and then clicking on a sub node, which will display a list of the available letters in the selected category in the right-hand pane

The following toolbar buttons are available at the top of the Details pane on the Word Letter Templates screen



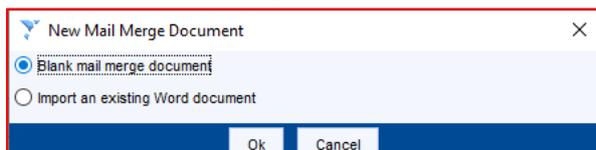
These options are also available, by right clicking on a selected letter template from the list

- preview the selected template
- amend the details for the selected template
- amend the Word document associated with the selected template
- copy the selected template
- delete the selected template
- show/hide details for the selected template

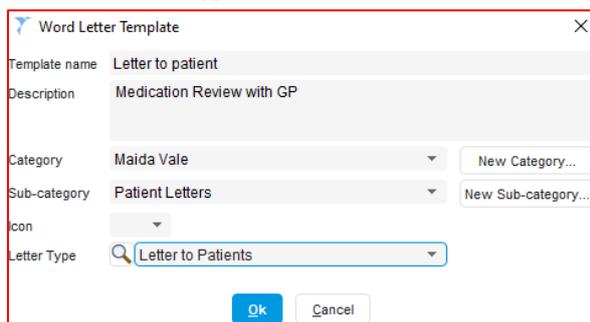
2. Creating A New Letter Template in Word

Creating a Letter Template from scratch, using a Blank Mail Merge document

- From the **Main Menu**, navigate to **Setup>Referrals and Letters>Word Letter Templates**
- Click the **New Template** Tab
- Select **Blank Mail Merge document**

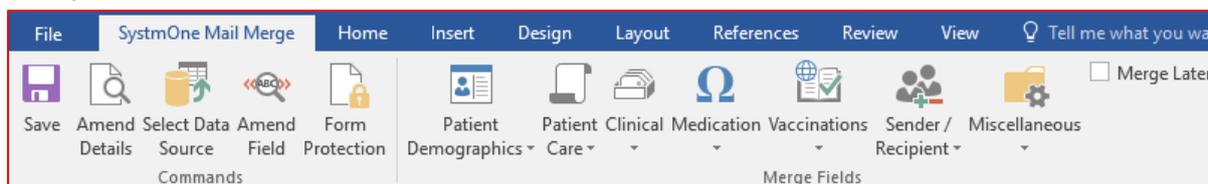


- Click **OK**, the Word Letter Template Details will display
- Type in a **Template name**
- Select a **Category** from the drop down (Maida Vale). If a suitable category is not available, click **New Category** and type in a new one
- Select a **Sub-category**. If a suitable sub-category is not available, click **New Sub-category** and type in a new one
- Select a **Letter Type**

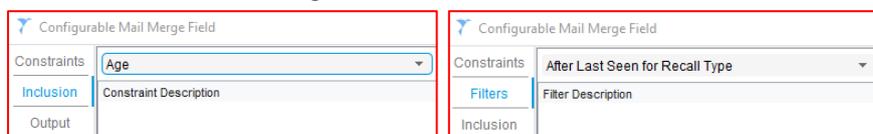


- Click **OK** when this is completed
- SystmOne will load a blank **Mail Merge** Word Document

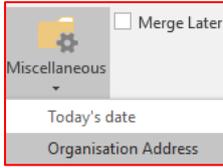
There will be a selection of **Commands** and configurable **Merge Fields** along the top toolbar for you to select when composing the letter template. You can also use the standard Word commands in the top ribbon, for example to insert a header



- You will not have to configure **Inclusion** or **Filters** if these are shown in any of the Merge Fields



1. Add the sending Organisation details in the appropriate place of the letter

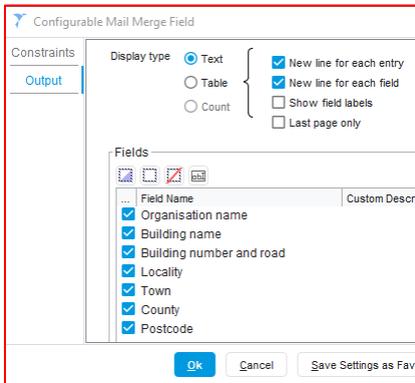


- Click **Miscellaneous** and select **Organisation Address** from the drop down options



There are no Constraints for this option

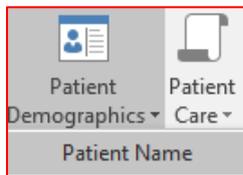
- Click on **Output**
- In **Display type**, select **Text, New Line for each entry & New line for each field**
- Select from the options given in **Fields**



- Click **OK** when this is completed

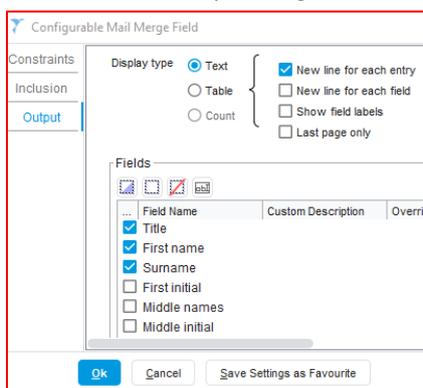
2. Add the recipient details in the appropriate place of the letter

- Click **Patient Demographics** and select **Patient Name** from the drop down options

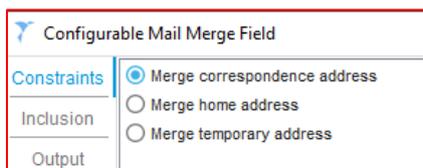


There are no Constraints for this option

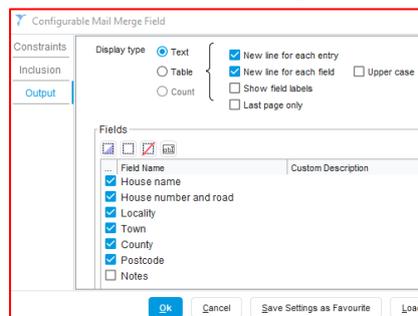
- Click on **Output**
- In **Display type**, select **Text**, **New Line for each entry** & **New line for each field**
- Select from the options given in **Fields**



- Click **OK** when this is completed and press the return key
- Select **Patient Address**. You may have address options to choose from on the **Constraints** tab



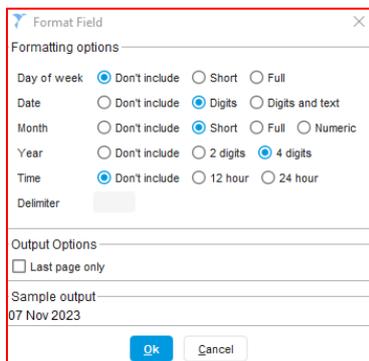
- Click on **Output**
- In **Display type**, select **Text**, **New Line for each entry** & **New line for each field**
- Select from the options given in **Fields**



- Click **OK** when this is completed

3. Add the letter date in the appropriate place of the letter

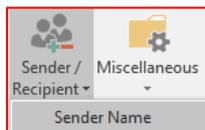
- Click **Miscellaneous** and select **Today's date**
- Select the **Formatting options** in which the date will appear on the letter. See **Sample output**



- Click **OK** when this is completed

4. Add the sender details in the appropriate place of the letter

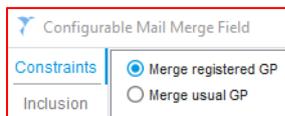
- Select from the **Sender** options



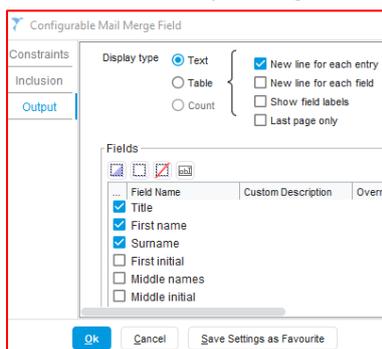
- Or as the example shows, you can merge the name of the patient's registered or usual GP



- Select from the **Constraints** tab



- Click on **Output**
- In **Display type**, select **Text**, **New Line for each entry** & **New line for each field**
- Select from the options given in **Fields**



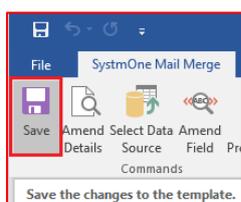
- Click **OK** when this is completed

5. Type the body of your letter

When typing the body of the letter, you can also add other information from any of the **Configurable Mail Merge Fields**. In this example, the **Medication Table** from the **Medication Merge Field** is shown
Your completed letter template may look something like this. All **Merge Fields** are enclosed in <brackets>



- When you have completed your letter, click the **Save** button at the top left of the **SystemOne Mail Merge** commands. You cannot save the document directly from Word



- Your New Letter Template will be listed under its category and will be available for use in your practice

Creating a Letter Template using an existing Word document

- Click the **New Template** Tab
- Select **Import an existing Word document**
- Select the letter (document) you want to import – *this could be on your desk top or in a personal or shared drive folder*
- Check the **Template name** and select the correct **Category** if this is not shown, then click **OK**
- You can now add the configurable **Mail Merge** Fields as previously shown

We advise you to create the new letter in a TEST patient record to check that it is correct, before using it in a real patient record

3. Creating, viewing and amending Letters in a Patient Record

Creating a New Letter in a Patient Record

- Retrieve the patient and navigate to the **Communications and Letters** node in the Clinical Tree
The following toolbar buttons are available at the top of the Communications and Letters View



- create a new letter
- create a GPR Insurance Report
- send an email to the patient
- print a label using a form that has already been set up or print an appointment letter using the Print Letters/Labels dialog
- contact the patient using their preferred method of communication
- view the details of the selected communication/letter
- view the selected communication/letter
- amend the contents of the selected communication/letter (only applies if *Saved for Future Editing*)
- 'mark in error' the selected communication/letter

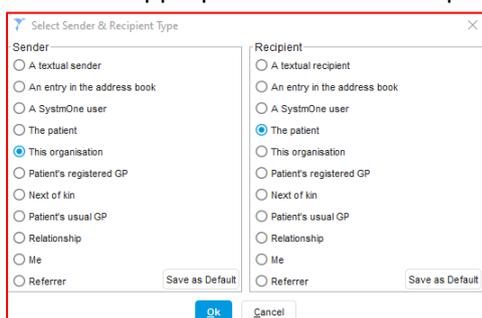
There are also some options available by right clicking on the Communications & Letters node

- Click on the toolbar button Create a new letter or Right click on the Communications & Letters node and select New Letter



The Sender & Recipient Type details window will display

- Select the appropriate Sender & Recipient and click OK



The recipient and sender details will populate in the next window

The screenshot shows the 'New Letter' interface. The 'Recipient' section includes fields for Name (Ms Anna Anderson), Organisation, House name, Road (14 Marylebone Road), Locality, Town (London), County, and Postcode (NW1 5JD). The 'Sender' section includes fields for Name, Organisation (CWHHE Training), House name, Road (15 Marylebone Road), Locality, Town (London), County, and Postcode (NW1 5JD). The 'Writing' section shows the 'Editor' set to 'MS Word' (highlighted with a red box) and the 'Template' set to 'Letter to Patients' (also highlighted with a red box). Other options include 'SystemOne', 'Choose Template...', and 'Medication Review Invite.doc'.

- Make your selections in the **Writing Section**

IMPORTANT – Editor **MUST** have **MS Word** selected

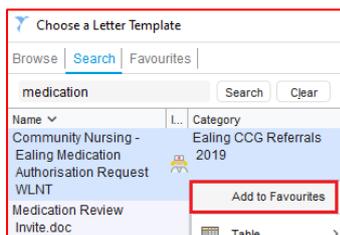
- Click the **Choose Template** button
- You can **Browse** to navigate to a folder and select the appropriate letter template. By clicking on the arrow pointers you can expand and collapse each folder

The screenshot shows the 'Choose a Letter Template' dialog box. It has tabs for 'Browse', 'Search', and 'Favourites'. Under the 'Browse' tab, there is a tree view with folders for 'Dermatology' and 'Diabetes'. The 'Diabetes' folder is expanded, showing several document templates like 'Diabetes Patient - Incomplete Private RV.doc', 'Diabetes Review 2nd Invitation with blood form Dec 2011.doc', etc.

- or you can use the **Search** Field and type in the name or part name of the letter template you wish to use

The screenshot shows the 'Choose a Letter Template' dialog box with the 'Search' tab selected. The search field contains the text 'medication'. Below the search field, a list of search results is displayed, including 'Community Nursing - Ealing Medication Authorisation Request WLNT' and 'Medication Review Invite.doc'.

- By right clicking on a selected Letter Template, you can **Add to Favourites** for your personal quick selection



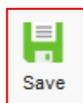
- **Letter Type** defaults to A&E, use the drop-down to select the appropriate type
- You can select a **Letter Type** to **Save as Default**. This will be your own personal default, remember to change this if needed for future letters



- When you have made all the selections, click **Write Now**
- The **Mail Merge Word Document** will load
- Make any amendments needed
- Note that there are two options for saving the letter:



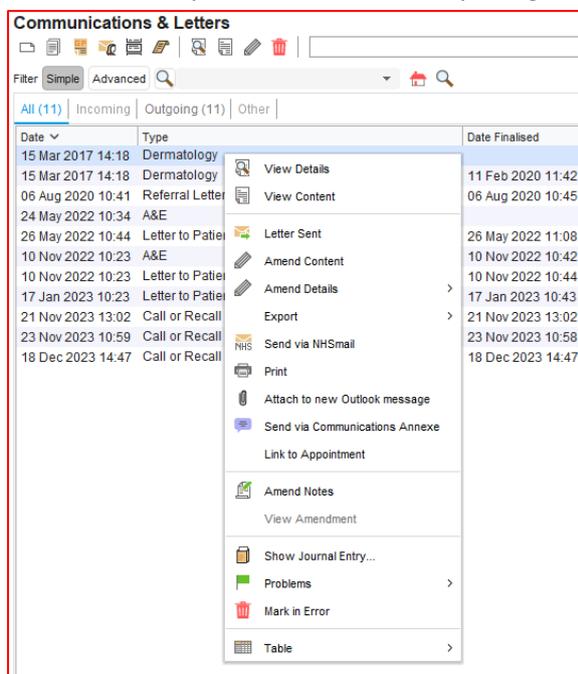
- **Save For Future Editing** will allow you to amend the document in the future
- If you click **Save Final Version**, you will not be able to edit this document in the future



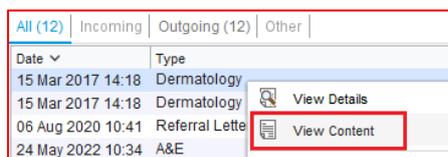
- Click the **Save** button on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

Viewing a letter in a Patient Record

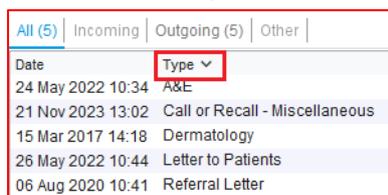
- Via **Communications & Letters** node of the **Clinical Tree**
- These are the options available when you right click on a selected letter in the list



- Right click and select **View Content**. The letter will open in Word and can be closed in Word



- The **Communications & Letters** View can be sorted by column. Click in any of the Grey Column Headings to reorder the list by column. The example shown is listed in order of Type, shown by the arrow pointer



- The **Date Finalised** Column indicates whether the Letter has been *Saved as Final Version* or *Saved for Future Editing* (the date will be blank)

Date	Type	Date Finalised	Sender
24 May 2022 10:34	A&E		CWHHE Training
21 Nov 2023 13:02	Call or Recall - Miscellaneous	21 Nov 2023 13:02	Mr Simon Benges, CWHHE Training
15 Mar 2017 14:18	Dermatology		CWHHE Training
26 May 2022 10:44	Letter to Patients	26 May 2022 11:08	CWHHE Training
06 Aug 2020 10:41	Referral Letter	06 Aug 2020 10:45	CWHHE Training

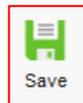
Amending a letter in a Patient Record

If the letter has been *Saved for Future Editing*, you can amend this at a future date

- Right click on the letter and select **Amend Content** or click on the **Pencil Button** in the Communications & Letters Toolbar

Date	Type	
24 May 2022 10:34	A&E	View Details
10 Nov 2022 10:23	A&E	View Content
21 Nov 2023 13:02	Call or Recall - Mis	Letter Sent
23 Nov 2023 10:59	Call or Recall - Mis	Amend Content
18 Dec 2023 14:47	Call or Recall - Mis	Amend Content
15 Mar 2017 14:18	Dermatology	Amend Content
15 Mar 2017 14:18	Dermatology	Amend Content

- Additional Merge Fields can be added specifically for this patient
- Make any changes and when you are satisfied that no more changes need to be made, click **Save Final Version**

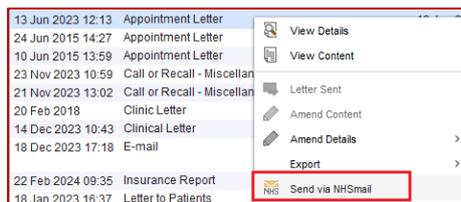


- Click the **Save** button on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

Sending a letter from a Patient Record

Send via NHSmail - Allows you to send a copy of the selected communication to an NHSmail recipient or other secure email from the generic NHSmail address set up in your practice SystemOne Unit

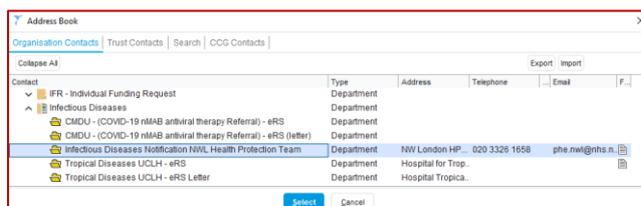
- Right click on the letter and select **Send via NHSmail**



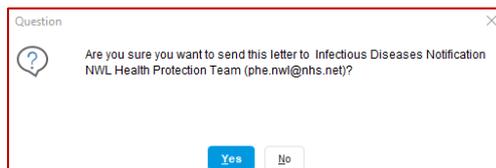
- The Choose Email Recipient window will appear, select **Existing Contact**



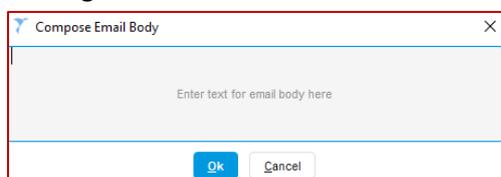
- The Address Book will open, click to highlight the address you wish to send the letter to from the list and click **Select**



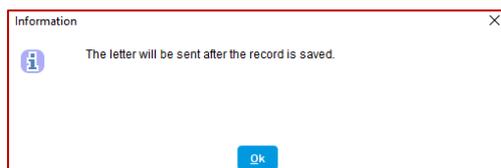
- Click **Yes** to the Question



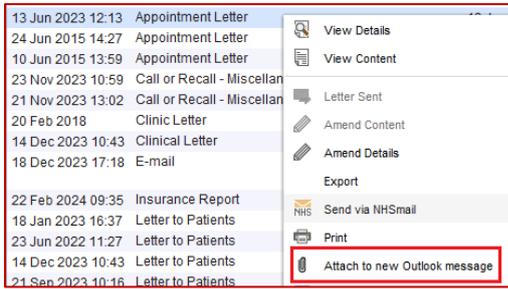
- Type your message in the **Compose Email Body** Dialogue box and click **OK** when you have completed your message



- Click **OK** to the information window



Attach to new Outlook message - Allows you to send the selected communication as an attachment to an NHSmail recipient or other secure email from your own NHSmail address



- Click the **Save** button on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

Disclaimer:

To the best of our knowledge and using the available information, this guidance is correct at the time of publishing.

Please do not hesitate to contact us if you have any queries via the IT Service Desk:

Phone: 0203 350 4050 or Email: nhsnw.servicedesk@nhs.net