2023

SystmOne Creating Letters

USER GUIDE PRIMARY CARE SYSTEMS TEAM



Contents

Introduction		2
1. View	ving the Word Letter Templates Screen	3
2. Crea	ting A New Letter Template in Word	4
Creating a	a Letter Template from scratch, using a Blank Mail Merge document	4
Creating a	a Letter Template using an existing Word document	8
3. Crea	iting, viewing and amending Letters in a Patient Record	9
Creating a	a New Letter in a Patient Record	9
Viewing a	a letter in a Patient Record	12
Amending	g a letter in a Patient Record	13
Sending a	a letter from a Patient Record	14
Disclaimer:		15



Introduction

This user guide is aimed at providing staff with an understanding of creating Word letters within SystmOne. 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 SystmOne 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 SystmOne 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.

Patient	Appointments	Reporting	Audit	Setup	Clinical Tools	Workflow	Us	er (System	Help
Q	ľ	1			Users & Policy		>	\$	Staff	& Organisation Setur
Search	Task	Discard	Save		Prescribing		>	*	Staff	Leave

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

🖗 Nev	v Staff	of Amend Staff	Rechive Staff	f 🕴 New Locum	Change Password	🗱 Disable Logon 👒	Enable Logon
🔺	Role					Last Logged On	Currently Log
Dr	Syster	ms Support Acces	ss Role			01 Nov 2023 14:37	~~
Dr	Dr Systems Support Access Role 18 Oct 2023 14:13						
Mrs	Syster	ms Support Acces	ss Role			02 Nov 2023 12:53	<u>~</u>
Ms	Syster	ms Support Acces	ss Role	Amend Staff		11 Oct 2023 12:19	

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

7 Amend Staff Details
Global Settings Local Settings Local Access Rights Skill Sets Additional Languages Additional Details Stock/Pharmacy Access
Administration
✓ System Administrator - can create new user profiles and set user access rights
Password Administrator - can set user passwords and re-enable disabled user profiles
EDI Administrator - can process EDI Registration and IOS messages
🗹 Template Manager - can manage data entry templates, event details templates, dashboards and custom views
✓ Graph Administrator - can manage organisation-wide graph presets
Uses Security Controlled Procedures - to manually approve and deduct patients
✓ Makes IOS and REG Claims - can generate IOS and Registration claim messages
✓ File scanned images - can file scanned images
<u>Q</u> k <u>C</u> ancel



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

Active Templates						
۾ Ø	e) Pa	Î	¥			

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

🍸 New Mail Merge Documer	nt		Х
Blank mail merge document Import an existing Word docum	nent		
	<u>O</u> k	<u>C</u> ancel	

- 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

Vord Letter	~		
Template name	Letter to patient		
Description	Medication Review with GP		
Category	Maida Vale	*	New Category
Sub-category	Patient Letters	-	New Sub-category
lcon	*		
Letter Type	CLetter to Patients	-	
	<u>Qk</u> <u>C</u> ancel		

- 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

File	Sys	tmOne Mai	l Merge	Home	Insert De	esign	Layout	t Refere	nces Rev	view Vie	ew ♀Tel	l me what you wan
	Q		<i comparison="" of="" se<="" second="" th="" the=""><th></th><th></th><th></th><th></th><th>Ω</th><th></th><th></th><th>A</th><th>Merge Later</th></i>					Ω			A	Merge Later
Save	Amend	Select Data	Amend	Form	Patient	Patient	Clinical	Medication	Vaccinations	Sender /	Miscellaneou	IS
	Details	Source	Field	Protection	Demographics *	Care 🔻	*	-	*	Recipient *	*	
		Command	ls						Merge Fields			

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

🝸 Configura	ible Mail Merge Field	🍸 Configurable Mail Merge Field				
Constraints	(Age 👻		Constraints	After Last Seen for Recall Type 👻		
Inclusion	Constraint Description		Filters	Filter Description		
Output			Inclusion			



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



• Click Miscellaneous and select Organisation Address from the drop down options

Configura	able Mail Merge Field
Constraints	There are no constraints for this merge field.

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**

Constraints		
Output	O Table S Vew line	e for each entry e for each field
I	O Count Show fi	eld labels
	Last pag	ge only
	Fields	
	Field Name	Custom Descri
	Organisation name	
	Building number and road	
	Locality	
	Town	
	County	
	Posicode	
	<u>Ok</u> <u>Cancel</u> Sav	ve Settings as Favo

• 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



	Configurable Mail Merge Field						
n	Constraints	There are no constraints for this merge field.					

- 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**

Constraints Inclusion Output	Display type Table Count Last pag	for each entry for each field Upper case Id labels e only
	Fields Field Mane Field Name House number and road Locality Town Countly Postcode	Custom Description

• 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

🍸 Format Fie	eld	×					
Formatting op	tions						
Day of week	Oon't include	O Short O Full					
Date	O Don't include	O Digits ○ Digits and text					
Month	O Don't include	● Short ○ Full ○ Numeric					
Year	O Don't include	🔾 2 digits 💿 4 digits					
Time	Oon't include	O 12 hour O 24 hour					
Delimiter							
Output Options							
Sample outpu 07 Nov 2023	ıt —						
	<u>0</u> k	Cancel					

- 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. <u>Type the body of your letter</u>

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
strackets>

Ν	AIDA VALE MEDICAL CENTRE The Mansions, The Avenue, London W9 Tel: 020 0200 0200
< Patient Nam <patient addre<="" th=""><th>e> :ss></th></patient>	e> :ss>
Dear <patient< td=""><td>Name></td></patient<>	Name>
NHS Number	: <nhs number=""></nhs>
Invite for you	r Annual Medication Review
Your current m	nedication:
<medication(ta< td=""><td>ble)></td></medication(ta<>	ble)>
Your GP has b appointment to medication.	een reviewing your record and would like to invite you to book a non-urgent see them in clinic before you put in a request for your next batch repeat
Please call the	surgery on <sender details=""> to book your appointment with <gp name="">.</gp></sender>
	y
Yours sincerely	
Yours sincerely	

• When you have completed your letter, click the **Save** button at the top left of the **SystmOne 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

Con	Communications & Letters									
		GP 1=	Q	Ē	F		9		Ø	Ŵ

- 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

Communications & Letters	
- 🗐 🖷 🛯 🖉 🖉 🗑 🖉 🏢	Communication
Filter Create a new letter	-> Referrals (6)

Communications & Letters (11)		Communication Wizard
Referrals (6)	Ð	New Letter

The Sender & Recipient Type details window will display

• Select the appropriate Sender & Recipient and click OK





New Letter									
Other Details	Exact date	& time 🔻	Thu 21 De	ec 2023 🔻	10:01	X			
Changing the	consultatior	date will af	fect all other	r data entered	l. To avoid t	his, ca	ancel and press the 'N	exť bu	utton Hide Warnin
Destatest									
Recipient									
Name	MS		а		Middle Nam	es	Anderson		
Organisation									
House name					Address B	ook			
Road	14	Marylebor	ie Road		Director	y			
Locality					Telephone	0754	42 547441		
Town	London				Fax				
County									
Postcode	NW1 5JE		Find Ad	dd Map					
Sender									
Name		▼ First	Name		Middle Nam	es	Surname		
Organisation	CWHHE Tr	aining							
House name					Address B	ook			
Road	15	Marylebor	e Road		Director	,			
Locality					Telephone	020	2250 4050		
Town	London				Fox	020	3330 4030		
County					r ax				
Postcode	NW1 5JE)	Find Ad	dd Map					
Writing									
Editor C) SystmOne	MS Wor	i i						
Template Cr	noose Templa	te 🗙 M	edication Re	eview Invite.d	oc				
Letter type	Letter to F	atients						Ŧ	Save as Default
	2	_	_	<u></u>		_			

The recipient and sender details will populate in the next window

• Make your selections in the Writing Section

MPORTANT - 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



• <u>or</u> you can use the **Search** Field and type in the name or part name of the letter template you wish to use





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

🍸 Choose a Letter Template								
Browse Search Favourites								
medication Search Clear								
Name V Community Nursing - Ealing Medication Authorisation Request	L	Category Ealing CCG Referrals 2019						
WLNT		Add to Favourites						
Invite.doc		Table >						

- 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

Letter type	CLetter to Patients	▼]	Save as Default

- 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

🗅 🖩 🚆 液 🛱 🖉 🧕 🖉 🎁 !	
Filter Simple Advanced 🔍 👻 🃩 🔍	
All (11) Incoming Outgoing (11) Other	
Date V Type Date Fin	nalised
15 Mar 2017 14:18 Dermatology	
15 Mar 2017 14:18 Dermatology 🐨 View Details 11 Feb	0 2020 11:42
06 Aug 2020 10:41 Referral Letter 📄 View Content 06 Aug	2020 10:45
24 May 2022 10:34 A&E	
26 May 2022 10:44 Letter to Patier 🛸 Letter Sent 26 May	y 2022 11:08
10 Nov 2022 10:23 A&E Amend Content 10 Nov	v 2022 10:42
10 Nov 2022 10:23 Letter to Patier	v 2022 10:44
17 Jan 2023 10:23 Letter to Patier V Americ Details 17 Jan	1 2023 10:43
21 Nov 2023 13:02 Call or Recall Export > 21 Nov	v 2023 13:02
23 Nov 2023 10:59 Call or Recall NHS Send via NHSmail 23 Nov	v 2023 10:58
18 Dec 2023 14:47 Call or Recall 18 Dec	c 2023 14:47
Attach to new Outlook message	
Send via Communications Annexe	
Link to Appointment	
Marend Notes	
View Amendment	
Show Journal Entry	
Problems >	
🔟 Mark in Error	
Table >	

• 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)

All (5) Incoming Outgoing (5) Other								
Date	Туре 🗸	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 Benge, 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	Туре 🗸		
24 May 2022 10:34	A&E	2	
10 Nov 2022 10:23	A&E	1	View Details
21 Nov 2023 13:02	Call or Recall - Mis		View Content
23 Nov 2023 10:59	Call or Recall - Mis		
18 Dec 2023 14:47	Call or Recall - Mis	¥	Letter Sent
15 Mar 2017 14:18	Dermatology		Amend Content
15 Mar 2017 14:18	Dermatology	In	Amond Dataila

- 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

<u>Send via NHSmail</u> - 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 SystmOne Unit

• Right click on the letter and select Send via NHSmail

13 Jun 2023 12:13	Appointment Letter	5		10.1.0
24 Jun 2015 14:27	Appointment Letter	8	View Details	
10 Jun 2015 13:59	Appointment Letter		View Content	
23 Nov 2023 10:59	Call or Recall - Miscellan			
21 Nov 2023 13:02	Call or Recall - Miscellan	ч.	Letter Sent	
20 Feb 2018	Clinic Letter		Amend Content	
14 Dec 2023 10:43	Clinical Letter		1	
18 Dec 2023 17:18	E-mail		Amend Details	,
			Export	>
22 Feb 2024 09:35	Insurance Report	NULL OF	Send via NHSmail	
18 Jan 2023 16:37	Letter to Patients	MHS	Sond Ha Hiroffidi	

• The Choose Email Recipient window will appear, select Existing Contact

Choose Er	nail Recipient	×
?	Do you want to email the patient or a contact from your address book?	
	Patient Existing Contact Cancel	

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

7 Address Book					:	×
Organisation Contacts Trust Contacts Search CCG Contacts						
Collapse All				Export Import		
Contact	Туре	Address	Telephone	Email	F	
V 📙 IFR - Individual Funding Request	Department					
▲ Infectious Diseases	Department					
CMDU - (COVID-19 nMAB antiviral therapy Referral) - eRS	Department					
🚔 CMDU - (COVID-19 nMAB antiviral therapy Referral) - eRS (letter)	Department					
Infectious Diseases Notification NWL Health Protection Team	Department	NW London HP	020 3326 1658	phe.nwl@nhs	.n)	
🚔 Tropical Diseases UCLH - eRS	Department	Hospital for Trop.				
🔁 Tropical Diseases UCLH - eRS Letter	Department	Hospital Tropica.				
Select	Cancel					

• 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





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

13 Jun 2023 12:13 Appointment Letter 24 Jun 2015 14:27 Appointment Letter 10 Jun 2015 13:59 Appointment Letter 23 Nov 2023 10:59 Call or Recall - Miscellan 21 Nov 2023 13:02 Call or Recall - Miscellan 20 Feb 2018 Clinic Letter 14 Dec 2023 10:43 Clinical Letter 18 Dec 2023 17:18 E-mail					
24 Jun 2015 14:27 Appointment Letter 10 Jun 2015 13:59 Appointment Letter 23 Nov 2023 10:59 Call or Recall - Miscellan 21 Nov 2023 13:02 Call or Recall - Miscellan 20 Feb 2018 Clinic Letter 14 Dec 2023 10:43 Clinical Letter 18 Dec 2023 17:18 E-mail Amend Details Export				Appointment Letter	13 Jun 2023 12:13
10 Jun 2015 13:59 Appointment Letter View Content 23 Nov 2023 10:59 Call or Recall - Miscellan Letter Sent 21 Nov 2023 13:02 Call or Recall - Miscellan Amend Content 20 Feb 2018 Clinical Letter Amend Content 14 Dec 2023 10:43 Clinical Letter Amend Details 18 Dec 2023 17:18 E-mail Export		View Details	2	Appointment Letter	24 Jun 2015 14:27
23 Nov 2023 10:59 Call or Recall - Miscellan 21 Nov 2023 13:02 Call or Recall - Miscellan 20 Feb 2018 Clinic Letter 14 Dec 2023 10:43 Clinical Letter 18 Dec 2023 17:18 E-mail Amend Details Export		View Content		Appointment Letter	10 Jun 2015 13:59
21 Nov 2023 13:02 Call or Recall - Miscellan Letter Sent 20 Feb 2018 Clinic Letter Image: Clinical Letter 14 Dec 2023 10:43 Clinical Letter Amend Content 18 Dec 2023 17:18 E-mail Export				Call or Recall - Miscellan	23 Nov 2023 10:59
20 Feb 2018 Clinic Letter / Amend Content 14 Dec 2023 10:43 Clinical Letter / Amend Details 18 Dec 2023 17:18 E-mail Export		Letter Sent	-	Call or Recall - Miscellan	21 Nov 2023 13:02
14 Dec 2023 10:43 Clinical Letter Amend Details 18 Dec 2023 17:18 E-mail Export		Amend Content		Clinic Letter	20 Feb 2018
18 Dec 2023 17:18 E-mail Export		1		Clinical Letter	14 Dec 2023 10:43
Export		Amend Details		E-mail	18 Dec 2023 17:18
		Export			
22 Feb 2024 09:35 Insurance Report Send via NHSmail		Send via NHSmail	NUC	Insurance Report	22 Feb 2024 09:35
18 Jan 2023 16:37 Letter to Patients			inna	Letter to Patients	18 Jan 2023 16:37
23 Jun 2022 11:27 Letter to Patients Print		Print		Letter to Patients	23 Jun 2022 11:27
14 Dec 2023 10:43 Letter to Patients 0 Attach to new Outlook message		Attach to new Outlook message	0	Letter to Patients	14 Dec 2023 10:43
21 Sep 2023 10:16 Letter to Patients	<u> </u>		<u> </u>	Letter to Patients	21 Sep 2023 10:16



• 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: <u>nhsnwl.servicedesk@nhs.net</u>