1 - Patient Letters

Purpose: Prints user-defined patient letters such as recall, missed appointment, new patients, dunning, patient address for envelopes, pre- appointment, and thank you for your referral letters.

Sort: The report is sorted by patient account.

Selection: Lets you select pre-defined letters supplied with the Medical Office System or letters added by a user. The record selection criteria for each letter depends on how the letter was defined. See Chapter 12, "Support File Maintenance", on how to define a patient letter.

Procedure: At the Reports Main Menu press [8] for the "Patient Reports Menu" then press [1] for Patient Letters.

```
Change Printer Selection? (Y/N)  >
```

Press [Y] to change the printer destination. Then a prompt to select the provider is displayed.
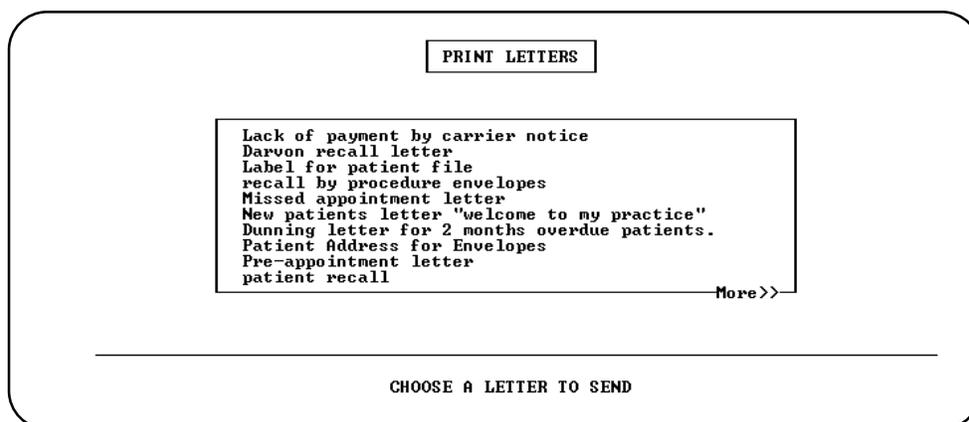
A list of defined letters will be displayed:


```
                        ┌─────────────────┐
                        │  PRINT LETTERS  │
                        └─────────────────┘

        ┌─────────────────────────────────────────────┐
        │ Lack of payment by carrier notice           │
        │ Darvon recall letter                         │
        │ Label for patient file                       │
        │ recall by procedure envelopes                │
        │ Missed appointment letter                    │
        │ New patients letter "welcome to my practice" │
        │ Dunning letter for 2 months overdue patients.│
        │ Patient Address for Envelopes                │
        │ Pre-appointment letter                       │
        │ patient recall                               │
        │                                      More>>  │
        └─────────────────────────────────────────────┘


                    CHOOSE A LETTER TO SEND
```

Figure 1-1:Patient Letter Selection

Highlight the desired letter using your arrow keys and then press [ENTER] to select. Depending on which letter was chosen, selection question(s) will be displayed.

For example:
1.   If choosing the Missed Appointment letter, the MOS will prompt you for the FROM and TO date.
or
2.   If choosing the recall letter, the MOS will prompt you to enter data to find in the first line of the patient's notes.

The prompts depend on how the letter was defined. For more information see Chapter 12, section Letter Files.

> *Note:* *It is important that the Title, First Name and Last Name be properly entered to print an appropriate letter format.*

See Appendix C for sample printouts.

3 - Recall Patient Letters

Purpose: Prints User defined letters using recall selections, such as missed recall or recall date.

Sort: The letters print by patient account number.

Selection: The patient's are selected based on the criteria selected for the letter to be printed. All letters are based on the recall month and missed appointment recalls can be included at the user's discretion. Letters with a selection of "Monthly Recall" are available to print from this option.

Paper: Standard paper as defined in the letter setup.

Procedure: At the Reports Main Menu press 8 for the "Patient Correspondence Menu" then press 3 for Recall Patient Letters.

```
Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination. The following prompt will be displayed:

```
 Input RECALL DATE   (MM/YYYY) >
```

Then a prompt will ask which recalls to select.

```
First Contact Only
Missed Appointment Only
Both of the Above
```

Highlight your choice and press ENTER .

Then a slide list will appear with the letter formats available.

```
Missed Recall Letter
Print Letter to all Patients with Monthly Recall
```

(Your list may vary. These letters can be defined from MOS Support Menu, Letters File.)

Any letter defined with a Select By of "Monthly Recall" will be available from this option.

See Appendix C for a sample printout.

4 - Recall Letters by Procedure

Purpose: Letters can be sent to patients, for any given procedure, that have not been seen since a given date. This can be useful to remind patients of the need for an annual or biannual procedure, such as a mammagram, blood pressure check, PAP Smear, etc. Any letter with the letters "proc" defined in the letter file is listed for selection for this report.

Sort: The report is sorted by account number.

Selection: The user enters the procedure and the date last seen to decide which records should be selected.

Paper: Standard letter paper as defined in the letter setup.

Procedure: At the Reports Main Menu press ⑧ for the "Patient Correspondence Menu" then press ④ for Recall Letters by Procedure. The following prompts will be displayed:

```
Change Printer Selection? (Y/N)  >
```

Press Ⓨ to change the printer destination.

```
ENTER PROCEDURE CODE TO SELECT PATIENTS BY >
```

```
RECALL PATIENT NOT SEEN SINCE (MM/DD/YY) >
```

After entering the questions a browse screen will be displayed with any letter containing the letters "proc" in their title:

```
Recall by Procedure
Recall by procedure envelope
```

Highlight the desired recall format using your arrow keys then press ENTER to select. For more information about defining letters see chapter 12, "MOS Support File Maintenance," the section on the Letters File. (Note: Only letters define as recall letters will be displayed.)

See Appendix C for a sample printout.

6 - HIPPA Label for Files - 1up
7 - HIPPA Label for Files - 3up

Purpose: Prints a selected list of patient file labels containing no PHI data. Only the patient account number is included. Select 1 up if there is only one label across. Select 3up if there are 3 labels across

Sort: Default is by account number, or the user can modify/change the sort field(s).

Selection: Using the extended selection screen the user defines the record selection criteria.

Paper: Sent to default printer, 40 column (4" wide) by 6 lines long (1 inch long) labels. The labels are set use special printer code 11 to insure 10 pitch print. An alignment check is included to help you line up the labels. If you are spooling the labels, answer "N" a few times then answer "Y" and wait for the labels to start printing. You will have a few labels at the beginning to quickly adjust the paper before you get to the first actual label.

Procedure: At the Reports Main Menu press `8` for the "Patient Correspondence Menu" then press `6` or `7` for HIPPA File Labels. A sort screen will be displayed, modify the sort as needed and then press `ESC` . The next screen displayed will be the extended selection screen which is used to select the records to be printed.   Press `ENTER` to select all, or supply the required selection criteria.

```
  Change Printer Selection? (Y/N)  >
```

Press `Y` to change the printer destination. Then a prompt to select the provider is displayed.

An alignment question will appear to ask if the label is aligned properly. An alignment form will give you a chance to adjust the paper, a form with X's instead of data is printed for each time the alignment question is answered No. One test form is always printed.

Spooled Printing On a system with spooled printers, this alignment prompt appears before anything has printed. It can still be useful. Each answer of No will generate one more form as a test to be used to align the paper. If you press `N` then additional pages will be inserted to allow time to adjust the paper alignment. No more than 1 page should be necessary, once you become familiar with your printer and how to load the paper or forms properly.

 For more information about sorting and the extended selection screen see chapter 13.

See Appendix C for a sample printout.

A - Patient Mailing Labels - 1up
B - Patient Mailing Labels - 3up

Purpose: Prints a selected list of patient mailing labels. Select 1 up if there is only one label across. Select 3up if there are 3 labels across

Sort: Default is by zip code then name, or the user can modify/change the sort field(s).

Selection: Using the extended selection screen the user defines the record selection criteria.

Paper: Sent to default printer, 40 column (4" wide) by 6 lines long (1 inch long) labels. The labels are set use special printer code 11 to insure 10 pitch print. An alignment check is included to help you line up the labels. If you are spooling the labels, answer "N" a few times then answer "Y" and wait for the labels to start printing. You will have a few labels at the beginning to quickly adjust the paper before you get to the first actual label.

Procedure: At the Reports Main Menu press 8 for the "Patient Correspondence Menu" then press A or B for Patient Mailing Labels. A sort screen will be displayed, modify the sort as needed and then press ESC . The next screen displayed will be the extended selection screen which is used to select the records to be printed.   Press ENTER to select all, or supply the required selection criteria.

```
   Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination. Then a prompt to select the provider is displayed.

An alignment question will appear to ask if the label is aligned properly. An alignment form will give you a chance to adjust the paper, a form with X's instead of data is printed for each time the alignment question is answered No. One test form is always printed.

Spooled Printing   On a system with spooled printers, this alignment prompt appears before anything has printed. It can still be useful. Each answer of No will generate one more form as a test to be used to align the paper. If you press N then additional pages will be inserted to allow time to adjust the paper alignment. No more than 1 page should be necessary, once you become familiar with your printer and how to load the paper or forms properly.

     For more information about sorting and the extended selection screen see chapter 13.

     See Appendix C for a sample printout.

C - Recall Patient Labels - 1up
D - Recall Patient Labels - 3up

Purpose: Prints mailing labels for recall patients marked for a given month and year.

Sort: The report is sorted by patient last names then by first names.

Selection: The user enters the month and year to be selected.

Paper: Sent to default printer. Set for 40 column labels (4 inches wide) by 1 inch long with one across.

Procedure: At the Reports Main Menu press ⑧ for the "Patient Correspondence Menu" then press Ⓒ or Ⓓ for Recall Patient Labels.

> **Change Printer Selection? (Y/N) >**

Press Ⓨ to change the printer destination. Then a prompt to select the provider is displayed.

The following prompt will be displayed:

> **Input RECALL DATE (MM/YYYY) >**

See Appendix C for a sample printout.