

INSight Letter Writer Instructions



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INSight Patient Letter Writer Instructions

Overview

INSight Letter Writer is a flexible program that merges INSight patient data into user-defined letters. This allows your practice to create personalized patient letters covering a wide range of practice to patient correspondence. You can print an individual patient letter for a selected patient such as a welcome letter, or letters for selected patients. You can use Letter Writer to generate patient surveys, demographic information sheets, and general practice notices such as new a provider introduction, change of address notices, and doctor retirement notices.

In addition, certain INSight reports have an option to build letters based on the selected report parameters. You can use the ATB report to generate past due letters for the appropriate patients. You can use the letter writer function of the Recall Analysis report to print a variety of patient letters based on the parameters entered. This includes missed appointments, letters to patients of specific providers, letters to patients who are treated at specific locations or letters to patients of certain ages for specific procedures. You can generate recall reminders for patients using the Print Recall List and with the Scheduled Appointments Create Workfile routine you can generate appointment reminders for patients with scheduled appointments. After the letter files are generated, you can use the Batch Letter Writer routine to print the letters.

These instructions explain how to:

- Create letter formats using the Add/Change/Delete Letter Formats routine.
- Print Letter Formats and review for accuracy.
- Generate various types of letters including past due and patient appointment or recall Letters.
- Print the letters.
- Purge unused Letter Formats if needed.
- Letter Examples

General Letter Writer Recommendations:

1. Using Word or other product, enter the letter. Identify the letter text and where patient data or other elements should fill in.
2. Using a worksheet, create Letter Formats that map the contents of each line and how each line of the letter should print.
3. With the worksheet as a guide, enter the letter format using **Add/Change/Delete Format**.
4. Proof your work by printing the Letter Formats.
5. Test the letter formats by printing a few letters.
6. Now you are ready to generate and print letters!

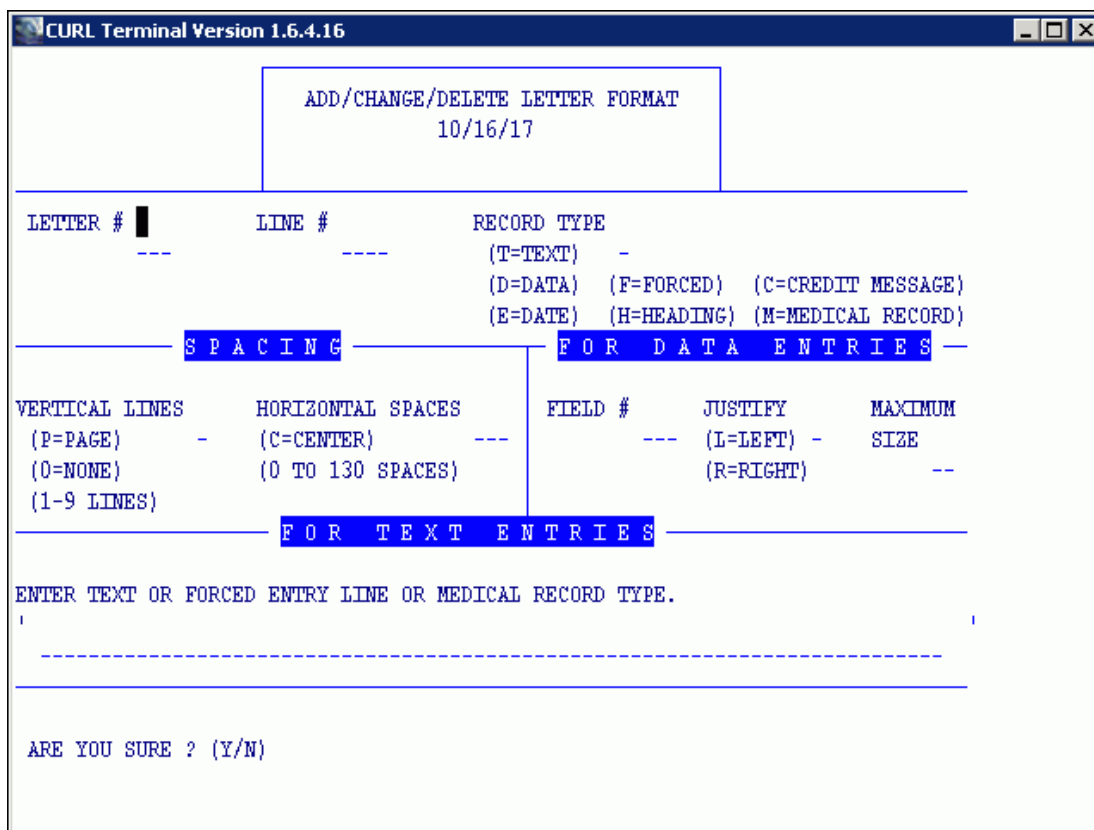
Build Letters Formats- Add/Change/Delete Letter Format

Use the Add/Change/Delete Letter Format routine to create letter formats. The letter formats contains the letter structure which data is merged into and then printed.

Notes:

- Generally, because every letter should begin at the top of the page, enter **P** (form feed) as the spacing for the first line of the letter.
- To exit from Add/Change/Delete Letter Formats:
 - From Letter #, press **[Enter]**.
 - From Line #, enter **END** and then, from Letter # press **[Enter]**.
 - If the cursor is at any other field in Letter Writer, press **[Cancel]**. This returns you to Line #, where you enter **END**.

From CURL main menu enter **.LW** for Letter Writer. Enter **1** for Letter Formats and **20** for **Add/Change/Delete Formats**.



To create a Letter Format:

Add/Change/Delete Letter Formats Prompts	
Letter #	Enter the number to assign to this letter. 3.0 numeric

	<p>If this is a new letter, the following prompt displays: New Letter? Y/N. If this is a new letter, enter Y to continue. Otherwise, enter N to return to Letter # for another entry.</p>
Line Number	<p>To assign a line number to each line of the letter, enter the line number. To allow for future line insertions, increment each line number by 10.</p> <p>Tips:</p> <ul style="list-style-type: none"> To finish entering lines, enter END. The cursor will stop at Letter #. Press [Enter] to exit from the letter. Enter HELP to display the complete list of patient fields and their number. Press [Enter] to display additional pages. Press [Esc] to return to the Add/Change/Delete Letter Format screen. Often the first line of text is the practice name unless you are using letter head stationary. The lines after that contain the body of the letter.
Record Type	<p>Choose a Record Type:</p> <ul style="list-style-type: none"> Record Type – Text - Enter T to enter text at the <i>For Text Entries</i> part of the screen. Note: Letter Writer is set up to print the data fields (patient’s name, address, etc.) in a combination of upper and lower case. You can have this feature turned off, so that data field print in upper case only. The text prints exactly as entered and will not convert to upper and lower case regardless of how the Data Fields option is set. Record Type – Data - Enter a D for Data to retrieve relevant data from the patient record. Note: When you specify Record Type D, you will specify field number, justification and maximum size in characters. Record Type – Date - Enter E to print a date on this line of the letter. Record Type – Forced Entry - Enter F to force the system to stop and allow you to make an entry before the letter prints. This can be used to enter a name, the person who is sending the letter out, appointment dates, etc. This is used for information that is different on a letter by letter basis and is not stored in INSight. Record Type – Credit Message – Enter C to assign a credit message to each patient’s account each time this letter is generated. The credit message contains the date the letter is generated and the letter number. <p>Note: Record Type Header and Medical Records are reserved for future use.</p>
Spacing	
Vertical Lines	<p>Enter the number of lines to scroll down before printing the line.</p> <p>Vertical Lines Options:</p> <ul style="list-style-type: none"> P – Scroll to new page before printing this line. Tip: Generally, assign to the 1st line of each letter to ensure the letter starts at the top of the page. 0 – Print this line without scrolling 1-9 – Scroll down the number of lines specified before printing the line
Horizontal	<p>Enter the number of spaces to move before printing the line. Or, enter C to</p>

Spaces	center the line on the page.
For Data Entries	
Field #	<p>The field number is a preassigned value that the system uses to access and retrieve patient data such as name, address or patient balance.</p> <p>Example: To retrieve a patient's first and last names, enter field # 3 and # 4 respectively.</p> <p>Tip: For a complete list of patient fields and their associated field number, go to Line # and enter HELP. A complete list displays. Press [Enter] to display additional pages. Press [Esc] to return to the Add/Change/Delete Letter Format screen.</p>
Justify	<p>To specify how the data field information should be positioned, enter a choice:</p> <ul style="list-style-type: none"> • L – Align data to the left margin • R – Align data to the right margin
Maximum Size	Enter the maximum display size for the data.
Exit	<p>To finish entering lines, at the Line # enter END. The cursor stops at the Letter # field. To go back to the Letter Writer menu, press [Enter] at the Letter # field.</p>
Do You Want to Print a List of the New Format?	<p>To print a report of a new letter format, enter Y for yes. Or, to skip printing the format, enter N.</p> <p>Note: If Y is entered, the printer prompt displays. Enter the printer number and the letter format prints.</p>

Editing a Line in an Existing Letter Format

1. Enter **1** for Add/Change/Delete Letter Format.
2. At the Letter # field, enter the number of the letter to edit.
3. At the Line # field, enter the line number to edit.
4. At the Record Type field, press **[Backspace]** and enter the new Record Type, if applicable.
5. Enter the information for the Record Type.
6. When finished editing lines, at the Line # enter **END**. The cursor stops at Letter #. Enter another letter # or press **[Enter]** to escape from the Add/Change/Delete Letter Formats screen.

Adding a New Line to an Existing Letter Format

1. Enter **1** for Add/Change/Delete Letter Format.
2. At the Letter # field, enter the number of the letter to edit.
3. At the Line # field, enter the new number of the line to insert. **Note:** The new number must *precede* the line number if you are making an insertion.
4. Enter the rest of the fields for the line.

Deleting an Existing Line in a Letter Format

1. Enter **1** for Add/Change/Delete Letter Format.
2. At the Letter # field, enter the number of the letter to edit.
3. At the Line # field, enter the number of the line to delete.
4. At Record Type, enter **Y**.
5. The following prompt displays: **DELETE JUST THIS LINE? (Y/N)**.
6. Enter **Y** and press **[Enter]**. The line is deleted.

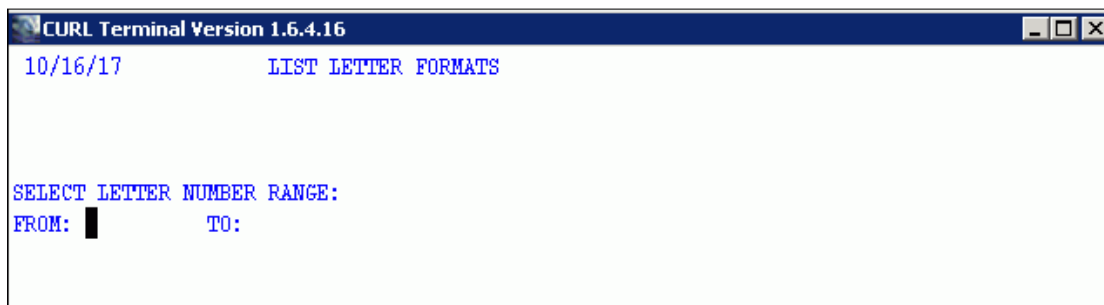
Deleting an Entire Letter Format

1. Enter **1** for Add/Change/Delete Letter Format.
2. At the Letter # field, enter the number letter to delete.
3. At the Line # field, enter any valid number of the line.
4. At Record Type, enter **X**.
5. The following prompt displays: **DELETE ENTIRE LETTER? (Y/N)**.
6. Enter **Y** and press **[Enter]**. The letter is deleted.

Print Letter Formats

Use the Print Letter Formats routine to print a selected letter format or all letter formats. The printed formats include the complete layout of the letter as entered including the line #s, Record Types, spacing and actual text. Use the formats to proof your work and make sure that the letters are built correctly.

From the Letter Writer main menu, enter **1** for Letter Formats and **21** for List Letter Formats. The following screen displays.



List Letter Formats Prompts	
Select Letter Number Range	Enter the beginning letter number to print. Or, leave blank to report all formats.

- From	
To	Enter the ending letter number to print a range of formats. Or, leave blank to report all formats.
Record Type	
'Return' to print Formats.	Press [Enter] to begin printing the letter formats.
Printer #?	Enter the printer number to print the letter formats.

Letter Formats List Sample

LETTER FORMAT LIST									
LETTER NO.	LINE	TYPE	VERT.	HORIZ.	FIELD	JUST.	MAX.	***** TEXT LINE *****	
012	0002	E	9	19					Failure to respond within 30 days will cause your
012	0004	T	0	0					
012	0010	D	6	19	3	L	0		
012	0014	D	0	1	4	L	0		
012	0018	D	1	19	5	L	0		
012	0020	D	1	19	6	L	0		
012	0022	D	1	19	7	L	0		
012	0024	T	0	0					,
012	0026	D	0	2	8	L	0		
012	0028	D	0	2	9	L	0		
012	0030	T	4	19					DEAR MR./MRS./MS
012	0031	D	0	1	4	L	0		
012	0032	T	0	0					,
012	0034	T	3	22					This letter is in reference to your past due account.
012	0036	T	1	22					Arrangements need to be made to cure the past due
012	0038	T	1	19					status of this account. Please call to make payment
012	0040	T	1	19					arrangements or pay the balance due.
012	0042	T	2	22					Failure to respond within 30 days will cause your
012	0043	T	1	19					account to be referred to an outside agency.
012	0044	T	2	22					You may reach our billing department at (207)781-3236.
012	0046	T	4	19					Thank you,
012	0048	T	2	19					MANAGEMENT
012	0050	T	4	19					PATIENT:
012	0052	D	0	1	3	L	0		
012	0054	D	0	1	4	L	0		
012	0056	T	2	19					BALANCE DUE \$
012	0058	F	0	1					ENTER BALANCE DUE

Generating Patient Letters Overview

After the letter formats are built you can generate patient letters from INSight. You have the option to print a single letter for an individual patient or print a group of letters for multiple patients. In addition, certain routines allow you to build a letter file based on the report parameters and then in a later step print the letters with the Batch Letter routine.

Ways to Print Patient Letters in Letter Writer:

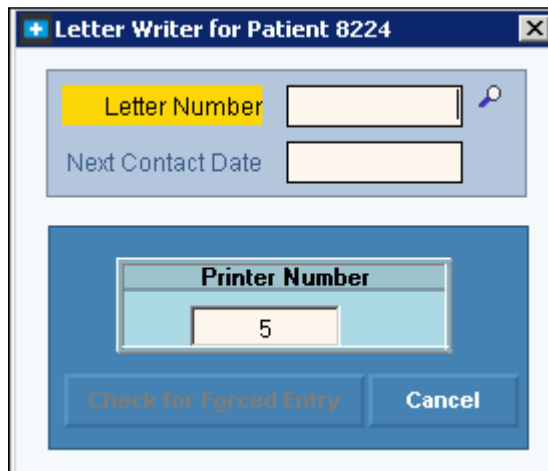
- **Patient Letter Writer** – prints single letter for a selected patient
- **Selected Letter Writer** – prints a letter for selected patients
- **Batch Letter Writer** – prints patient letters from a letter file generated from any of these routines:
 - Aged Trial Balance Report
 - Recall Analysis Report
 - Print Recall List
 - Scheduled Appointments Letters Create Workfile routine

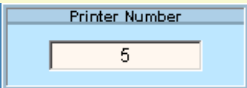



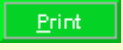

Note: Do not confuse Letter Writer and Batch Letter Writer with Patient Letters. The Patient Letters routines are separate routines and have separate functions that use XML.

Print a Single Letter - Patient Letter Writer

Use the Patient Letter Writer routine to print a single letter for an individual patient that is currently displayed in Patient Entry. For example, you can use this routine to print a patient welcome letter or a missed appointment letter.

Go to **INSight** → **Reports** → **Letter Writer** → **Patient Letter Writer**. The following screen displays.

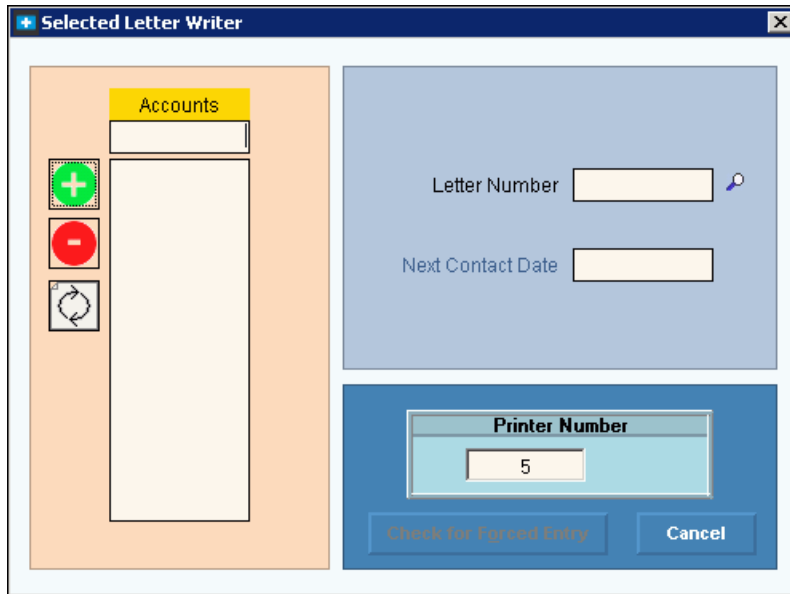





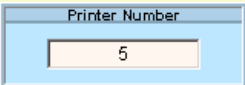
Patient Letter Writer Prompts	
Patient #	Enter the desired patient in Patient Entry or search for the patient. Note: The patient must already be displayed before selecting the patient letter.
Letter Number	Enter the number of the letter to print for the selected patient. Tip: Letter numbers are assigned during Add/Change/Delete Letter Formats.
Next Contact Date	Enter the next contact date, if applicable.
	The default printer number to print the letter displays. To change, enter another printer number.
	If there is a forced entry for the letter, click Check for Forced Entry . Note: This prompt is only active if there is a forced field in the letter.
<p>Forced Entry Steps After clicking Check for Forced Entry the following window displays:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center; color: blue;">Enter Forced Entry Field For Letter</p> <hr/> <div style="border: 1px solid gray; padding: 5px; background-color: #e0e0e0;"> <div style="background-color: yellow; display: inline-block; padding: 2px 5px;">day</div> <input style="width: 150px; height: 20px;" type="text"/> </div> <div style="text-align: right; margin-top: 10px;"> Continue Cancel </div> </div>	
Field	Enter the value for the forced field. In this example the forced field is day .
	To continue with the patient letter, click Continue . Note: If there is another Forced field, after clicking Continue it will display and you will be prompted to enter the field value.
	Or, to stop the print routine, click Cancel .
	To begin printing, click Print .
	To stop and escape from printing patient letters, click Cancel .


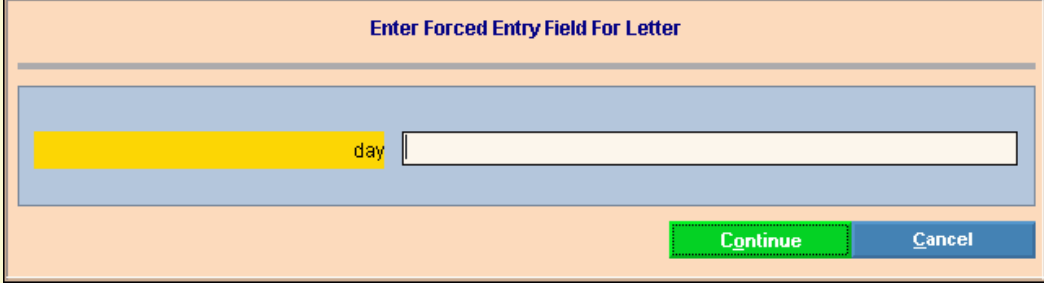



Print a Group of Letters - Selected Letter Writer

Use Selected Letter Writer to print a letter for up to 30 patients that you specify. Please note if you want to print a single letter for a specific patient use the Patient Letter Writer routine.

Go to **INSight** → **Reports** → **Letter Writer** → **Selected Letter Writer**. The following screen displays.



Selected Letter Writer Prompts	
Letter Number	Enter the number of the letter to print for the selected patients. Tip: Letter numbers are assigned during Add/Change/Delete Letter Formats.
Next Contact Date	Enter the Contact Date, if applicable.
Accounts	Enter the account for which a letter is to be printed and then press [Enter] or click Add Account  . The account number is added to the list. Continue adding accounts until all accounts are added. Other Actions: <ul style="list-style-type: none"> To remove an account, click to highlight the account and then click Remove Account . To refresh the list of accounts, click Refresh .
	The default printer number to print the letters displays. To change, enter another printer number.


	<p>If there is a forced entry for the letter, click Check for Forced Entry. Note: This prompt is only active if there is a forced field in the letter.</p>
<p>Forced Entry Steps After clicking Check for Forced Entry the following window displays:</p>	
	
<p>Field</p>	<p>Enter the value for the forced field. In this example the forced field is day.</p>
	<p>To continue with the patient letter, click Continue. Note: If there is another Forced field, after clicking Continue it will display and you will be prompted to enter the field value.</p>
	<p>To begin printing, click Print.</p>
	<p>To stop and escape from printing patient letters, click Cancel.</p>




Generate Past Due Letters from the Aged Trial Balance Report


Use the Aged Trial Balance report to generate past due letters for patients with past due accounts. To generate the past due letters, you will select the parameters to pinpoint the patient aging to report (for example all patients who are 90 days delinquent) and the letter format to use for printing the letters.

Note: After the letter file is built, print the letters using the Batch Letter Writer routine.

Go to **Reports** → **Operating Reports** → **Aged Trial Balance**.

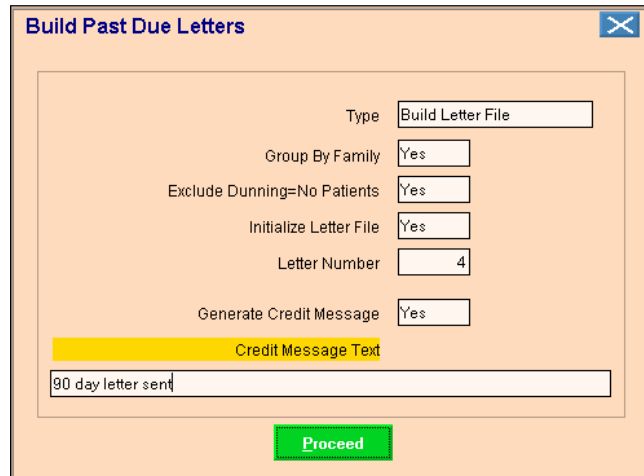
Aged Trial Balance Report Prompts	
Providers	<p>Enter the Provider Codes to report, if applicable. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a specific provider, simply enter the provider code. ○ To enter a group of providers, enter the first provider code, followed by a comma (,) and the next provider code. Continue in this fashion until the list of provider codes is complete. ○ Or, to search for a provider code, click Search . Keyboard shortcut: [CTRL + f].
Location	<p>Enter the Location Codes to report, if applicable. (up to 2 characters)</p>

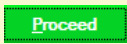
	<p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients who are seen at a location, enter the location. ○ To enter a group of locations, enter the first location code, followed by a comma (,) and the next location code. Continue in this fashion until the list of location codes is complete. ○ Or, to search for a location code, click Search  . Keyboard shortcut: [CTRL + f].
<p>Departments</p>	<p>Enter the Department Codes to report, if desired. (up to 2 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients who had services from a specific department, enter the department code. ○ To enter a group of departments, enter the first department code, followed by a comma (,) and the next department code. Continue in this fashion until the list of department codes is complete. ○ Or, to search for a department code, click Search  . Keyboard shortcut: [CTRL + f].
<p>Insurances</p>	<p>Enter the patient Insurances for which to generate letters. (up to 9 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients with a specific insurance, enter the insurance code. ○ To enter a group of insurances, enter the first insurance code, followed by a comma (,) and the next insurance code. Continue in this fashion until the list of insurance codes is complete. ○ Or, to search for an insurance code, click Search  . Keyboard shortcut: [CTRL + f].
<p>Groups</p>	<p>Enter the Group Codes for which to generate letters. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a group, enter the group code. ○ To enter a group of group codes, enter the first group code, followed by a comma (,) and the next group code. Continue in this fashion until the list of group codes is complete. ○ Search is not active for this field.
<p>ATB Categories</p>	<p>Enter the ATB Categories for which to generate letters. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a specific ATB Category, simply enter the ATB category code. ○ To enter a group of ATB Categories, enter the first ATB Category code, followed by a comma (,) and the next ATB category code. Continue in this fashion until the list of ATB category codes is complete.

<p>Form Types</p>	<p>To select the insurances for which to generate letters, click to select the appropriate names listed.</p> <p>Tips:</p> <ul style="list-style-type: none"> • If you are primarily interested in private balances select the insurances for self-pay or private. • To quickly select or de-select <i>all</i> Form Types, click Check All .
<p>Include Private</p>	<p>To include patient private balances on the letters, click Yes.</p>
<p>Include Collection</p>	<p>To include patient tickets sent to collections on the letters, click Yes. Or, to omit tickets out to collections, click No in the drop-down list.</p>
<p>Accept Assignment</p>	<p>To include only patient responsible balances and exclude balances for insurances, set Accept Assignment to No Only. To include both patient and insurance balances, set Accept Assignment to Both.</p>
<p>Balances</p>	<p>To limit the letters to individuals who owe over a certain amount, enter the lowest past due balance amount and the highest balance amount. For example to exclude individuals with balances under \$5, enter 5 and 99,999.00.</p>
<p>Credit Balance Accounts</p>	<p>To omit patient accounts with credit balances, click No in the drop-down list.</p>
<p>Zero Balance Accounts</p>	<p>To omit patient accounts with zero balances, click No in the drop-down list.</p>
<p>Expected A/R Only</p>	<p>To report expected A/R only, click Yes in the drop-down list. To report all A/R, click No in the drop-down list.</p>
<p>Weeks Since Last Payment</p>	<p>To limit the patient accounts to ones that have not made a payment in a specific number of weeks, enter the number of weeks. (3.0 numeric) Tip: Generally, this prompt pertains to collections reporting. Please leave blank, if you are not reporting collections information.</p>
<p>Allow Family Balances</p>	<p>To report family balances, click Yes in the drop-down list. Or, to omit family balances, click No in the drop-down list.</p>
<p>Posted Entries Only</p>	<p>To omit charges and payments that have not been posted, click Yes in the drop-down list. To include all charges and payments, click No in the drop-down list. Tip: Generally, you will choose Yes if you have not performed the Charge/Payment Post Initialize.</p>

<p>Age By Service Date</p>	<p>To age by service date, click Yes in the drop-down list. To omit aging by service date, click No in the drop-down list.</p>
<p>Build Past Due Letter File</p>	<p>To build the past due letter file, click Yes. To omit building the past due letter file and only run the report, click No.</p>
<p>Names</p>	<p>To specify the names to print on the report or the letters, click a choice. Entry Options: Guar, Patient, Both</p>
<p>Report Format</p>	<p>To specify the report format, click a choice in the drop-down list. Entry Options: ATB, Category Breakdown, Both</p>
<p>Sort By</p>	<p>To specify the sort criteria for the letters and report, click up to three choices. Sort Options:</p> <ul style="list-style-type: none"> <input type="radio"/> Provider, Location, Department <input type="radio"/> Patient #, Patient Name, Guarantor #, Guarantor Name <input type="radio"/> Balance, Group #, Insurance <input type="radio"/> ATB, Ticket #
<p>Selected Sort Options</p>	<p>Displays the selected sort options for your reference.</p>
<p>Totals By</p>	<p>To print totals by the sort criteria selected, click to select this box. To omit printing totals, leave this box blank. Note: There are 3 totals available. Totals are based on sort criteria selected. For example, if you select to sort by providers, insurances and locations, the totals will reflect that.</p>
<p>Print Totals Only</p>	<p>To print only totals on the report, click Yes in the drop-down list. To include details as well as totals on the report, click No in the drop-down list.</p>
<p>Age Levels</p>	<p>Enter the aging days for which to generate letters. (0-30, 31-60, 61-90, etc.)</p>
	<p>Displays the default printer number for printing. To change, enter another printer number to print the report if desired.</p>
	<p>To run the routine, click Print or press [ENTER]. Keyboard shortcut: [ALT + p]</p>
	<p>To escape from the routine, click Cancel. Keyboard shortcut: [ALT + c] Tip: Or, click Close .</p>

After click Print, the following screen displays:




Past Due Letter Writer Prompts	
Type	Select Build Letter File to create the Past Due letters. Or select Both to build the past due letter file and the ATB report. Tip: The ATB will provide management with a summary of the patients to receive a letter along with their balance information.
Group By Family	To group patients by family, click Yes . Otherwise, click No .
Exclude Dunning=No Patients	To exclude patients if the patient’s Allow Dunning option is set to No, click Yes . This means the patient will not receive a past due letter even if they qualify for a letter. Or, to include all patients, click No .
Initialize Letter File	To clear the letter file before beginning, click Yes .
Letter Number	Enter the letter number assigned to the past due notice to print.
Generate Credit Message	To generate a credit message for each patient that receives a past due letter, click Yes . Credit messages allow your practice to track communications between the patient and the practice as well as collections efforts. You can view these internal credit messages from Patient Entry. To omit a credit message for the letters, click No .
Credit Message Text	If you selected Yes to assign a credit message to patients receiving a past due letter, enter the credit message text to appear on the patient’s account. For example, enter 90 day letter sent when the 90-day letter is sent.
	To begin, click Proceed .






Generate Various Letters with Clinical Recall Analysis Report



Use the Build Letter function of the Clinical Recall Analysis Report to generate a wide variety of patient letters. You can generate letters for patients regarding certain procedures or diagnoses, or follow-up visit information such as diet and exercise as indicated in the Comment fields. For example, letters can be printed that pertain to practice changes (moving, provider retiring); patient flu shot reminders, procedure reminders (Pap smear or colonoscopy reminders) or patient surveys. After the Letter file is built you can print the letters from the Batch Letter Writer routine.

Tip: You may find it handy to print a list first to confirm the patients to receive the letter or reminder.

Go to **Reports → Operating Reports → Clinical Recall Analysis.**

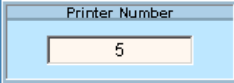



Clinical Recall Analysis Report Prompts	
Providers	<p>Enter the Provider Codes to report, if applicable. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a provider, enter the provider code. ○ To enter a group of providers, enter the first provider code, followed by a comma (,) and the next provider code. Continue in this fashion until the list of provider codes is complete. ○ Or, to search for a provider code, click Search .
Locations	<p>Enter the Location Codes to report, if applicable. (up to 2 characters)</p> <p>Tips:</p>

	<ul style="list-style-type: none"> ○ To send letters to patients at a location, enter the location code. ○ To enter a group of locations, enter the first location code, followed by a comma (,) and the next location code. Continue in this fashion until the list of location codes is complete. ○ Or, to search for a location code, click Search .
<p>Departments</p>	<p>Enter the Department Codes to report, if applicable. (up to 2 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a department, enter the department code. ○ To enter a group of departments, enter the first department code, followed by a comma (,) and the next department code. Continue in this fashion until the list of department codes is complete. ○ Or, to search for the appropriate department code, click Search .
<p>Patient Ins</p>	<p>Enter the patient Insurances to qualify for a letter, if applicable. (up to 9 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients with a specified insurance, enter the insurance code. ○ To enter a group of insurances, enter the first insurance code, followed by a comma (,) and the next insurance code. Continue in this fashion until the list of insurance codes is complete. ○ Or, to search for the appropriate insurance code, click Search .
<p>Service Ins</p>	<p>Enter the service Insurances to report. (up to 9 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ For an individual insurance, enter the insurance code. ○ To enter a group of insurances, enter the first insurance code, followed by a comma (,) and the next insurance code. Continue in this fashion until the list of insurance codes is complete. ○ Or, to search for the appropriate insurance code, click Search .
<p>Diagnosis</p>	<p>Enter the Diagnoses Codes to report. (up to 9 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ For an individual diagnosis, enter the diagnosis code. ○ To enter a group of diagnoses, enter the first diagnosis code, followed by a comma (,) and the next diagnosis code. Continue in this fashion until the list of diagnosis codes is complete. ○ Or, to search for the appropriate diagnosis code, click Search .
<p>Procedures</p>	<p>Enter the Procedure Codes to print letters for patients who received a</p>

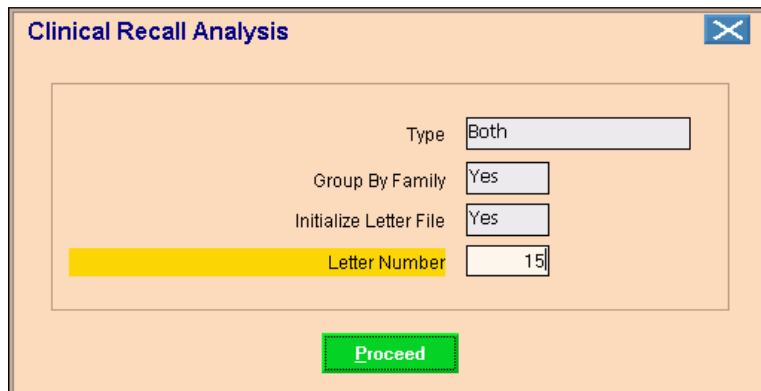
	<p>procedure during a selected time period. (up to 9 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ For an individual procedure, enter the procedure code. ○ To enter a group of procedures, enter the first procedure code, followed by a comma (,) and the next procedure code. Continue in this fashion until the list of procedure codes is complete. ○ Or, to search for the appropriate procedure code, click Search .
<p>Referrals</p>	<p>Enter the Referral Source Codes to send letters to patients with a specified referral source. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients from a specific referral, enter the referral source code. ○ To enter a group of referral source codes, enter the first referral source code, followed by a comma (,) and the next referral source code. Continue in this fashion until the list of referral source codes is complete. ○ Or, to search for the appropriate Referral, click Search .
<p>Service Dates From</p>	<p>To limit letters to a range of patient service dates, enter the beginning service date. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
<p>Service Dates Through</p>	<p>To limit letters to a range of patient service dates, enter the ending service date. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
<p>Posting Dates From</p>	<p>To limit letters to a range of patient posting dates, enter the beginning posting date. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
<p>Posting Dates Through</p>	<p>To limit letters to a range of patient posting dates, enter the ending posting date. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
<p>Birth Dates From</p>	<p>To limit patient letters to a range of patient birth dates, enter the beginning date of birth. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
<p>Birth Dates Through</p>	<p>To limit patients to a range of patient birth dates, enter the ending date of birth. (mmddccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>

Zip Codes From	<p>To limit the patient letters to a geographic area or zip code range, enter the beginning patient zip code.</p> <p>Tip: To include all patient zip codes, please leave blank.</p>
Zip Codes Through	<p>To limit the patient letters to those within a zip code range, enter the ending patient zip code.</p> <p>Tip: To include all zip codes, please leave blank.</p>
<p>Note: Because the Patient Comments 1, 2, and 3 fields are user-defined, the field labels may not match the documentation.</p>	
Patient Comments 1 From	<p>To limit the patients on the report to those within a range of Comments 1, enter the beginning Comments 1 value. (up to 15 characters)</p> <p>Tip: To include all patient comments, leave blank.</p>
Patient Comments 1 Through	<p>To limit the patients on the report to those within a range of Comments 1, enter the ending Comments 1 value. (up to 15 characters)</p> <p>Tip: To include all patient comments, leave blank.</p>
Gender	<p>To select a gender to report, click to select a choice in the drop-down list.</p> <p>Entry Options:</p> <ul style="list-style-type: none"> <input type="radio"/> B - To report both male and female <input type="radio"/> M - To report only males <input type="radio"/> F - To report only females
Marital Status	<p>To select the marital status to report, click a choice in the drop-down list.</p>
Accept Assignment	<p>To include only patient responsible balances and exclude balances for insurances, set Accept Assignment to No Only.</p> <p>To include only insurance balances and exclude patient balances, set Accept Assignment to Yes Only.</p> <p>To include both patient and insurance balances, set Accept Assignment to Both.</p>
Sort By	<p>To specify the sort criteria for the report, click up to three choices.</p> <p>Sort Options:</p> <ul style="list-style-type: none"> <input type="radio"/> Provider, , Location, Department <input type="radio"/> Patient Insurance, Service Insurance <input type="radio"/> Procedure Code, Diagnosis, Service Date <input type="radio"/> Zip Code, Gender, Marital Status <input type="radio"/> Assignment, Birth Date, Comments 1, 2, 3 <input type="radio"/> Referral, ATB Category

Selected Sort Options	Displays the selected sort options for your reference.
Type Processing	
Totals Only	To print only totals on the report, click to select this box. To print detail as well as totals, de-select this box.
One	To print one patient per line, click to select this box. Note: This option must be checked to activate the Build Letter File option.
Include History	To include patient history on the report, click to select this box. To omit history on the report, leave this box blank.
Build Letter File	To build the Letter file, click to select this box. Note: This setting is only active, if you select the One Patient/Line option.
Note: There are 3 totals and page breaks available. Totals and page breaks are based on sort criteria selected. If you select to sort by procedures, gender and birth dates, the totals will reflect that.	
Total By Provider	To print totals by providers, click to select this box. To omit printing provider totals, leave this box blank.
Total by Patient Ins	To print totals by patient insurance, click to select this box. To omit printing insurance totals, leave this box blank.
Total by Department	To print totals by departments, click to select this box. To omit printing department totals, leave this box blank.
Page Break On Provider	To start printing on a new page when the provider changes, click to select this box. To omit printing on a new page, leave this box blank.
Pg Break on Patient Ins	To start printing on a new page when the insurance changes, click to select this box. To omit going to a new page, leave this box blank.
Pg Break on Department	To start printing on a new page when the department changes, click to select this box. To omit printing on a new page, leave this box blank.

	<p>Displays the default printer number for printing. To change, enter another printer number.</p>
	<p>To run the routine, click Print or press [ENTER].</p>
	<p>To escape from the routine, click Cancel. Tip: Or, click Close .</p>

After clicking Print, the following prompt displays if Build Letter File option was selected.



<p align="center">Clinical Recall Letters Prompts</p>	
<p>Type</p>	<p>Select Build Letter File to create the patient letters. Select Both to print both letters and the Clinical Analysis report. Tip: It may be handy to print the report first to make sure the desired data is being generated. Then, printing the letters.</p>
<p>Group By Family</p>	<p>To group patients by family, click Yes. Otherwise, click No.</p>
<p>Initialize Letter File</p>	<p>To clear the letter file before beginning, click Yes.</p>
<p>Letter Number</p>	<p>Enter the letter number assigned to the past due notice to print.</p>

Generate Patient Recall Reminder Letters

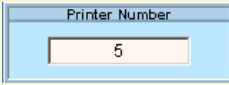

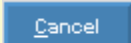
Use the Print Recall List to generate a Letter file containing patient letters or reminder postcards for patients with recall dates for a certain date range. A patient may be on a recall if they need to schedule an appointment for a future visit for such items as a yearly physical or periodic cholesterol screening. The Recall letters use information from the Patient Recall Logging Window where patients who need a recall appointment are maintained.

After the Letter file is built, you can print the letters from the Batch Letter Writer routine.

Go to **Reports** → **Print Recall List**. The following screen displays:

Print Recall Letters Prompts	
Providers	<p>Entry Options:</p> <ul style="list-style-type: none"> ○ To list recalls for a single provider, enter the provider code. ○ To limit the recall letters to a list of providers, enter the first provider code followed by a comma (,) and then enter the next code. Continue in this fashion until all providers are entered. (up to 4 characters) ○ To limit the list to a range of providers enter the beginning provider code, followed by a dash (-) and the ending provider code. ○ To list all providers, please leave blank.
Action	<p>To select a list action, click B - Build Letter File. Or, click A-Recall List to first view the patients due to receive a recall reminder.</p>
Letter #	<p>Enter the letter number assigned to the recall letter to print.</p>

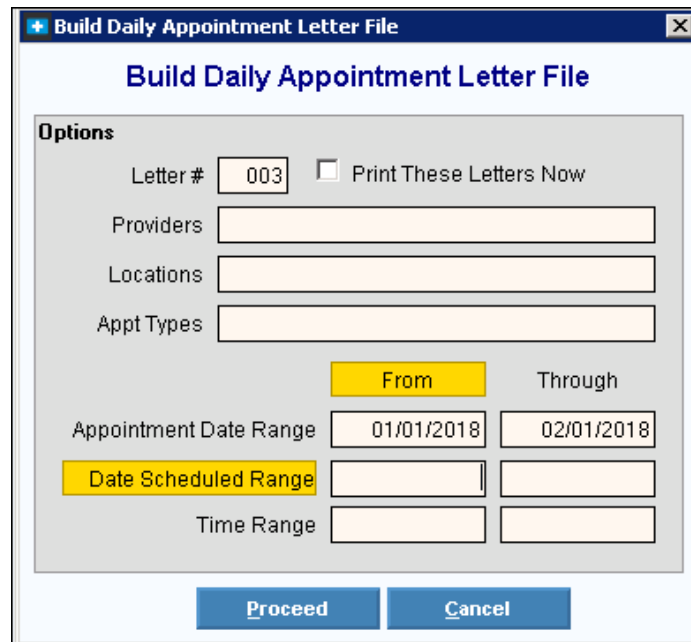
Recall Dates From	<p>To limit the letters to a range of recall dates, enter the beginning date for patient recalls. (mmddccyy)</p> <p>Tip: To include all recall dates, please leave blank.</p>
Through	<p>To limit the letters to a range of recall dates, enter the ending recall date. (mmddccyy)</p> <p>Tip: To include all recall dates, please leave blank.</p>
Recall Types From	<p>To limit the letters to range of recall types, enter the beginning recall type. (up to 6 characters)</p> <p>Tip: To include all recall types, please leave blank.</p>
Through	<p>To limit the letters to a range of recall types, enter the ending recall type. (up to 6 characters)</p> <p>Tip: To include all recall types, please leave blank.</p>
Comments From	<p>To limit the letters to a range of patient recall notes, enter the beginning recall note. (up to 16 characters)</p> <p>Tip: To include all recall notes, please leave blank.</p>
Through	<p>To limit the letters to a range of patient recall notes, enter the ending recall note. (up to 16 characters)</p> <p>Tip: To include all recall notes, please leave blank.</p>
Include	<p>To determine the recall letters to print, click a choice in the drop-down list.</p> <p>Include Choices:</p> <ul style="list-style-type: none"> <input type="radio"/> 1 - All Recalls <input type="radio"/> 2 - Only Unscheduled Recalls <input type="radio"/> 3 - Only Scheduled Recalls
Print Simple List	<p>To print a simple list of patients and their recall dates, click to select this box.</p> <p>To print a more detailed recall list with additional information, de-select this box.</p>
Sort By Last Name	<p>To sort the letters by patient last name, click to select this box.</p> <p>To omit sorting the letters by patient last name, de-select this box.</p>
Sort By Provider	<p>To sort the letters by provider code, click to select this box.</p> <p>To omit sorting the letters by provider code, de-select this box.</p>




	<p>Displays the default printer number for printing. To change, enter another printer number.</p>
	<p>To generate the report, click Print or press [ENTER].</p>
	<p>To escape from the print routine, click Cancel.</p>




Generate Scheduled Appointments Letters

Use the Patient Scheduled Appointments Letters Create Workfile to build a workfile of patients who have a scheduled appointment and who should receive a letter or postcard reminding them of their appointment. This may be handy way to notify patients of appointments they booked far in advance. After the workfile is built, letters\reminders can be printed during the Batch Letter Writer routine or from the Scheduled Appointments Print Letters routine if your office uses XML letters. In addition, you can select the **Print These Letters Now** option to print the letters as soon as the workfile is built if you are using the Batch Letter Writer routine.

Go to **Reports → Patient Letters → Scheduled Appointment Letters → Create Workfile**.



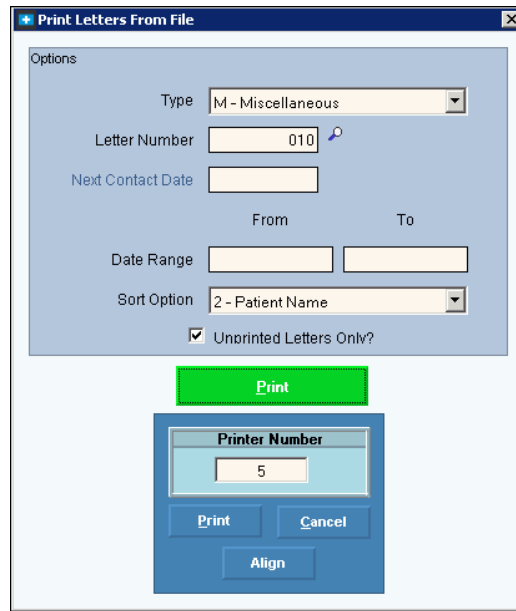
Scheduled Appointments Letters Create Workfile Prompts	
Letter #	Enter the number of the letter to use for the appointment reminders.
Print These Letters Now	<p>To print the letters as soon as the workfile is built, click to check this box. Otherwise, leave the box unchecked.</p> <p>Note: If this option is selected, as soon as the workfile is built the Batch Letter Writer routine will automatically open so that you can print the letters.</p>
Providers	<p>Enter the Provider Codes for which to generate letters, if applicable. (up to 4 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients of a specific provider, enter the provider code. ○ To enter a group of providers, enter the first provider code, followed by a comma (,) and the next provider code. Continue in this fashion until the list of provider codes is complete. ○ Or, to search for a provider code, click Search .
Locations	<p>Enter the Location Codes for which to generate letters, if applicable. (up to 2 characters)</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ To send letters to patients at a specific location, enter the location code. ○ To enter a group of locations, enter the first location code, followed by a comma (,) and the next location code. Continue in this fashion until the list of location codes is complete. ○ Or, to search for a location code, click Search .
Appointment Types	<p>Enter the appointment types for which to generate letters, if applicable.</p> <p>Tips:</p> <ul style="list-style-type: none"> ○ For an individual appointment type, enter the appointment type. ○ To enter a group of appointment type, enter the first appointment type, followed by a comma (,) and the next appointment type. Continue in this fashion until the list of appointment types is complete. ○ Or, to search for the appropriate appointment type, click Search .
Appointment Date Range To	<p>To limit letters to a range of appointment dates, enter the beginning appointment date. (mmdccyy, slashes and century optional)</p> <p>Tip: To include all, please leave blank.</p>
Appointment	To limit letters to a range of appointment dates, enter the ending appointment

<p>Dates Through</p>	<p>date. (mmddccyy, slashes and century optional) Tip: To include all, please leave blank.</p>
<p>Date Scheduled Range From</p>	<p>To limit letters to a range of scheduled dates, enter the beginning scheduled date. (mmddccyy, slashes and century optional) Tip: To include all, please leave blank.</p>
<p>Date Scheduled Through</p>	<p>To limit letters to a range of scheduled dates, enter the ending scheduled date. (mmddccyy, slashes and century optional) Tip: To include all, please leave blank.</p>
<p>Time Range From</p>	<p>To limit letters to a range of appointment times, enter the beginning time. (hh:mm, slashes and century optional) Tip: To include all, please leave blank.</p>
<p>Time Range Through</p>	<p>To limit letters to a range of appointment times, enter the ending time. (hh:mm, slashes and century optional) Tip: To include all, please leave blank.</p>
<p></p>	<p>To run the routine, click Proceed or press [ENTER].</p>
<p></p>	<p>To escape from the routine, click Cancel. Tip: Or, click Close .</p>

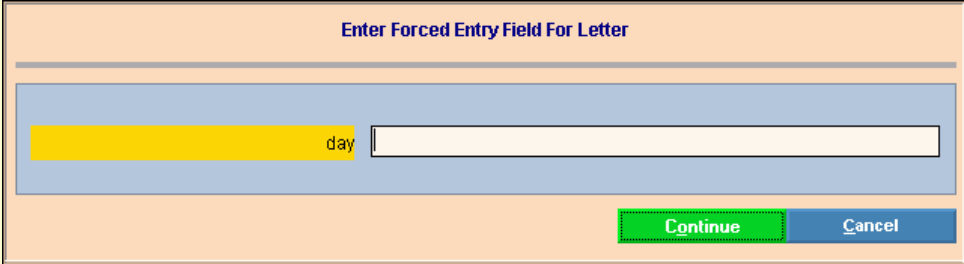




Printing Letters with Batch Letter Writer

Use the Batch Letter Writer routine to print the patient letters that are generated into a Letter file. This includes the patient past due letters that were generated from the ATB report, the various letters generated from the Clinical Recall Analysis report, the patient appointment recall reminders generated from the Print Recall list and patient scheduled appointment reminders generated from the Patient Letters Scheduled Appointments Create Workfile routine.

Go to **Reports** → **Batch Letter Writer**. The following window displays:



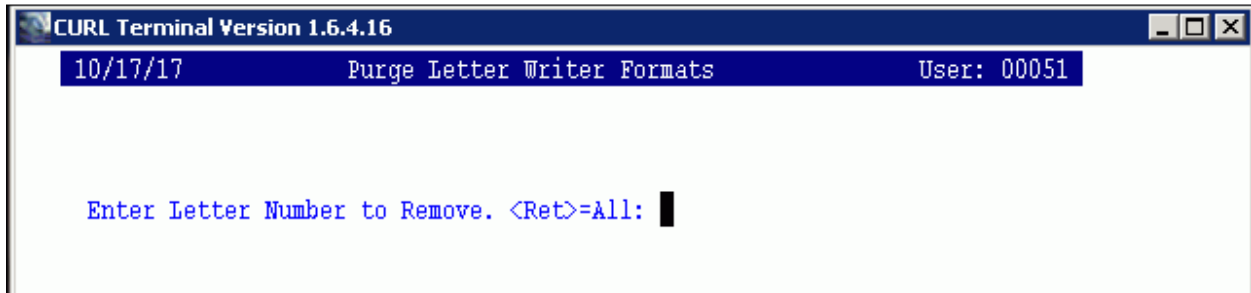
Batch Letter Writer Prompts	
Type	Select the type of letters to print: P – Past Due – Prints patient past due letters generated from the ATB R – Recalls – Prints patient recall letters generated from the Print Recall List M – Miscellaneous – Prints patient letters generated from the Clinical Recall report S – Scheduled Appointments – Prints patient scheduled appointment reminders generated from the Scheduled Appointments Letters Workfile
Letter Number	Enter the number of the letter to print.
Next Contact Date	Enter the next contact date, if applicable.
Date Range	Enter the beginning date range for patient letters. Or, leave blank to include all letters.

Date Range	Enter the ending date range for patient letters. Or, leave blank to include all patient letters.
Sort Option	To print the letters in a specific order, select a choice in the drop-down list.
Unprinted Letters Only?	To only print unprinted letters, click to check this box. To print all letters even if the letter has been printed before, leave this box unchecked.
Check for Forced Entry	If there is additional information needed for the letter, click Check for Forced Entry . Otherwise skip to the Printer Number prompt.
<p>Forced Entry Steps</p> <p>After clicking Check for Forced Entry the following window displays:</p> 	
Field	Enter the value for the forced field. In this example the forced field is day .
	To continue with the patient letter, click Continue . Note: If there is another Forced field, after clicking Continue it will display and you will be prompted to enter the field value.
	Or, to stop the print routine, click Cancel .
Printer Number	The default printer number displays. To change, enter another printer #.
	To begin printing, click Print .
	To stop and escape from printing patient letters, click Cancel .

Purge Letter Formats

Use the Purge Letter Formats routine to remove letter formats that are no longer used. You can specify a single letter format to remove or remove all letter formats.

From CURL, go to Letter Writer and enter **2** for Print Letters and then, enter **23** for Purge Formats. The following screen displays.



Purge Letter Formats Prompts	
Enter Letter Number to Remove. <RET> =All	Enter the number of the letter to purge. Or, leave blank to purge all letter formats.
Delete Letter # xx?	Enter Y to delete the specified letter number. Or, enter N to omit deleting the letter number specified.
Are You Sure? Y/N	Enter Y to proceed. Or, enter N to stop and select another letter number to purge.
Done. <Enter> to Continue:	This message displays when the purge is complete. Press [Enter] to return to the Letter Writer main menu.

Appendix A: Sample Letters

Faircity Healthcare Associates
362 US Rt 1
Falmouth, Maine 04105
800-649-7754

<Date>
<Patient First name> <Patient last name>
<address1>
<address2>
<City>, <State> <zip code>

Dear Mr/Mrs <Patient Last Name>,

This letter is to inform you that your balance with us is currently past due. In reviewing your account we noticed that we have not received a payment since <date of last payment>. At this time we request payment in full of <patient balance> be mailed today. If payment is not received within one week your account will be sent to collections.

Please include the following information with your payment:

Account Number: <account number>

Patient full name: <Patient First name> <Patient last name>

The insurance policy we currently have on file and have billed for you is:

<Ins #1> Policy: <certificate number>

Please notify our office if this information is not correct.

Thank you for your prompt attention to this matter.

<your name>
Billing Manager