

Patient Merge



This document is designed to introduce the user to the Patient Merge feature.

eTHOMAS
Patient Merge

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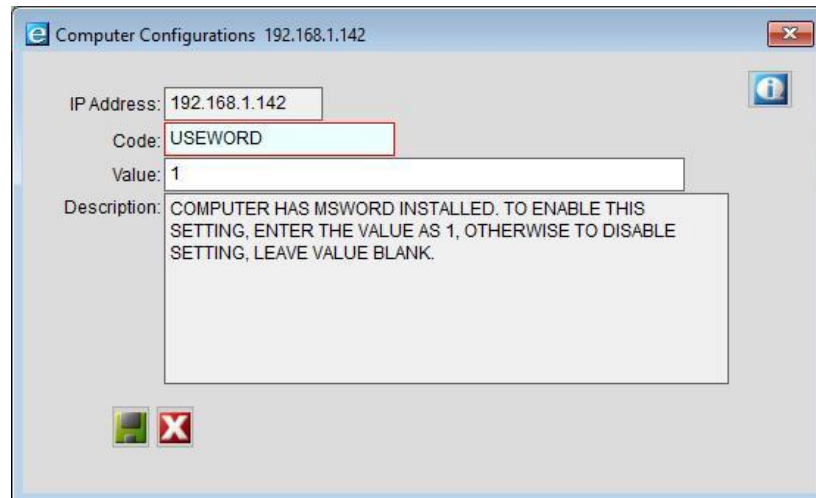
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Patient Merge Introduction

The Patient Merge is designed to be used with Microsoft® Word and can be beneficial in merging patient data to a pre-made document. Some examples of the different types of documents you may want to utilize within your office could be referral letters, out of work/school letters, injury letters, or transfer of care letters.

Getting Started

Before beginning, verify the computer you are going to use has Microsoft® Word. The next step is to verify that the Computer Setting USEWORD is activated. You can verify this in Utility | Settings | Computer Settings. If the computer setting is not activated, do so by clicking on the Plus sign to add it.




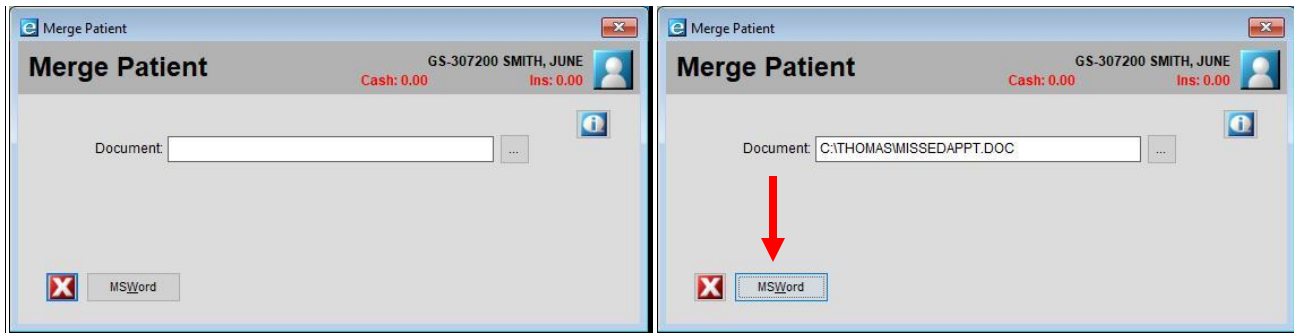
The next step is to open up a blank Microsoft Word document; save the document in a location you can easily access it. We recommend saving the document in the THOMAS folder so that it gets backed up and can be accessed from any computer that has Word on it. In addition, as long as THOMAS is being backed up, the document will be backed up. The nice thing about the Patient Merge is that you create the document once, save it, and it can be used over and over again for any patient.

Accessing Patient Merge

Now it's time to access Patient Merge. Merging can be done from the patient information screen, as well as from the patient's appointment.


Patient Information

To access the merge feature from the patient information screen, click Patient | Utility | Merge. Click the browse button  and browse for the document you saved, and then click MSWord.



Patient Appointment

To access the merge feature from the patient's appointment screen, click to open the appointment and select Merge.

Click the browse button  and browse for the document you saved, and then click MSWord.

Finishing the Merge

At this point, finish writing the letter and then you can begin inserting Merge Fields. Every version of Word is a little different, but to begin inserting Merge Fields you will want to go to Mailings and Insert Merge Fields.

Genius Solutions
7177 Miller Ave.
Warren, MI 48092

Tuesday, March 15, 2017

«First_Name» «Last_Name»
«Address»
«City», «State» «Zip»

Dear «First_Name»,
We take our patient's health very seriously. It appears that you missed your last appointment. Please make sure that you reschedule that appointment in order to keep your treatment plan on track.

Please call our office at 586-751-9080 within the next week to reschedule this appointment and not disrupt your treatment plan.

Sincerely,

Genius Solutions

Then click from the Mailings area, click on Finish the Merge, Edit individual documents to see the merge and then you can print the document as desired.

Genius Solutions
7177 Miller Ave.
Warren, MI 48092

Tuesday, March 15, 2017

DANIEL BLUE
123 OAK
FRASER, MI 48026

Dear DANIEL,

We take our patient's health very seriously. It appears that you missed your last appointment. Please make sure that you reschedule that appointment in order to keep your treatment plan on track.

Please call our office at 586-751-9080 within the next week to reschedule this appointment and not disrupt your treatment plan.

Sincerely,

Genius Solutions

Make sure to save the template if this it is to be used again. You do not want to save the merged document; you want to save the original document.