

## USING A PECS REPORT for MAIL MERGE

There may be times you want to send letters to some or all patients in the PECS registry. These instructions guide you in using a PECS report to help accomplish this. In this exercise a standard report in PECS is used to help create flu shot reminder letters for patients.

1. From the Main PECS screen, click on “Reports”.
2. At the main Reports screen, choose **a.)** “Select by Category”; **b.)** “General” in the Report Category box; and **c.)** “Mailing Info for All Pts in Registry” in the report picker. Now click on **d.)** “Run Report”.

2d

2a

2b

2c

Run Report

Report Options

Add Report

Edit Report

Delete Report

Report Directory: C:\Program Files\PECS\Reports\

Select by Category

Report Category

Cancer

Cardiovascular

Depression

Diabetes

General

Report Name:

Report Name	Report Category	Auto-run Days	Auto-run T
Summary Info for All Pts in Registry	General		
Mailing Info for All Pts in Registry	General		
List Pts No DM, CVD, Asthma, or Depression	General		
Detailed Visit Info	General		
Demographic Info for All Pts in Registry	General		

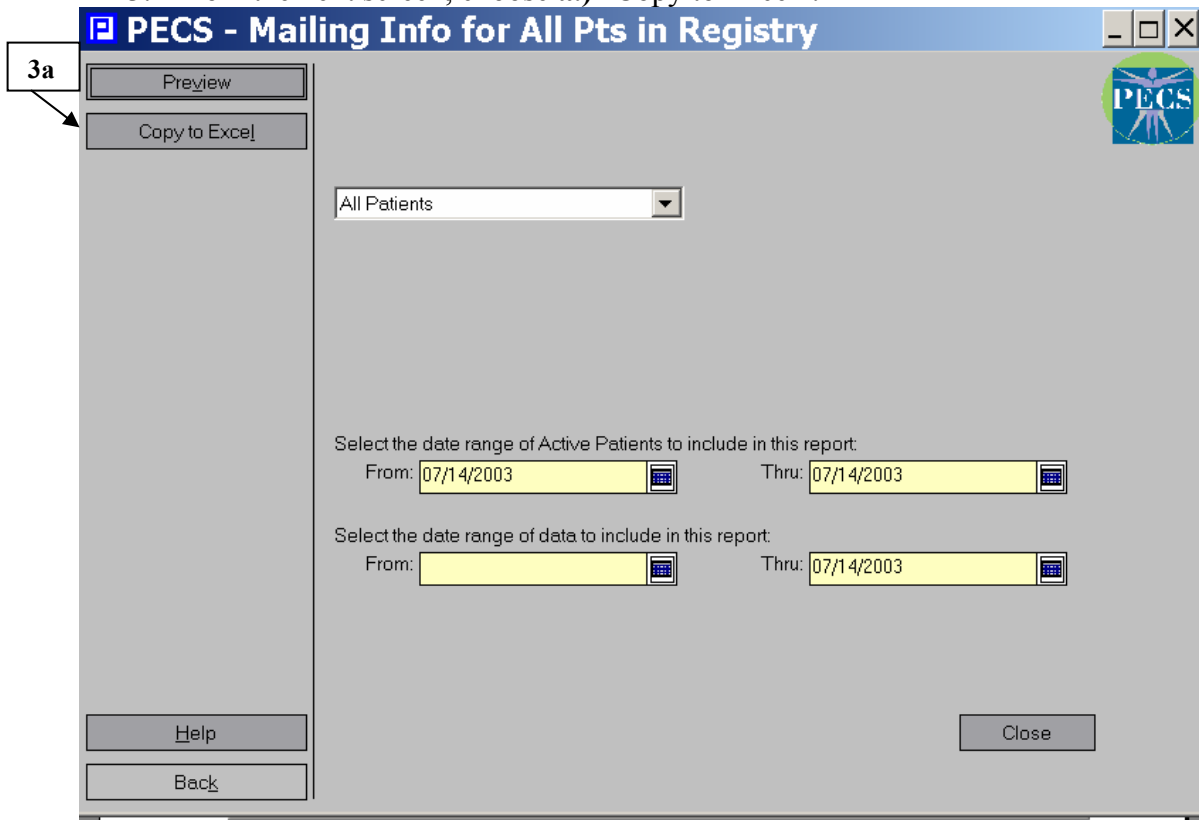
Refresh Report List

Help

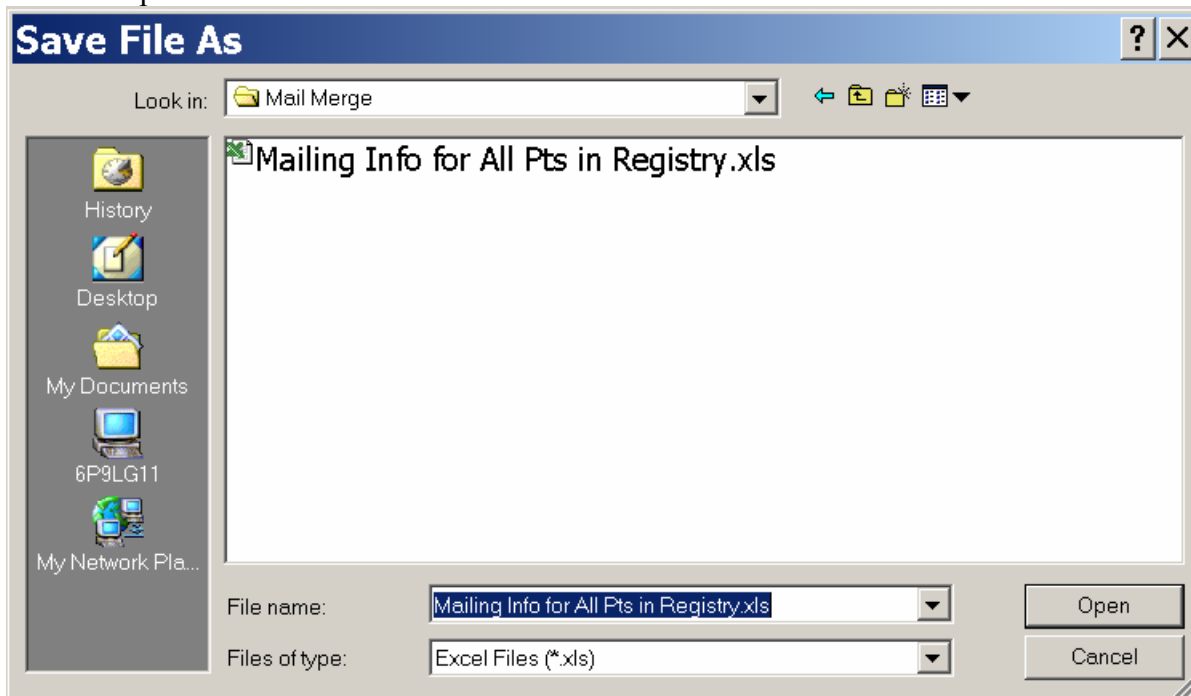
Back

Use this command to run the selected report.

3. From the next screen, choose a.) “Copy to Excel”.



4. A standard Windows “Save File As” screen lets you decide where to save the report. Recommend creating folder in which to store reports and merge results. Choose location; click “Open”.



5. Open a blank document in Word to prepare the template letter. Type main document, or template letter, and save it. The main document should contain the generic information you want to repeat in each form letter.

**Your Community Health Center, Inc.**  
123 Main Street  
Anytown, Anystate

8/12/2003 ←

Dear

**TIP:** To have date automatically updated place cursor at point where it's wanted and follow these steps: From main menu bar, click "Insert" -> Date and Time -> choose Format desired -> "OK"

We are writing to invite you to one of our flu shot clinics that will be held

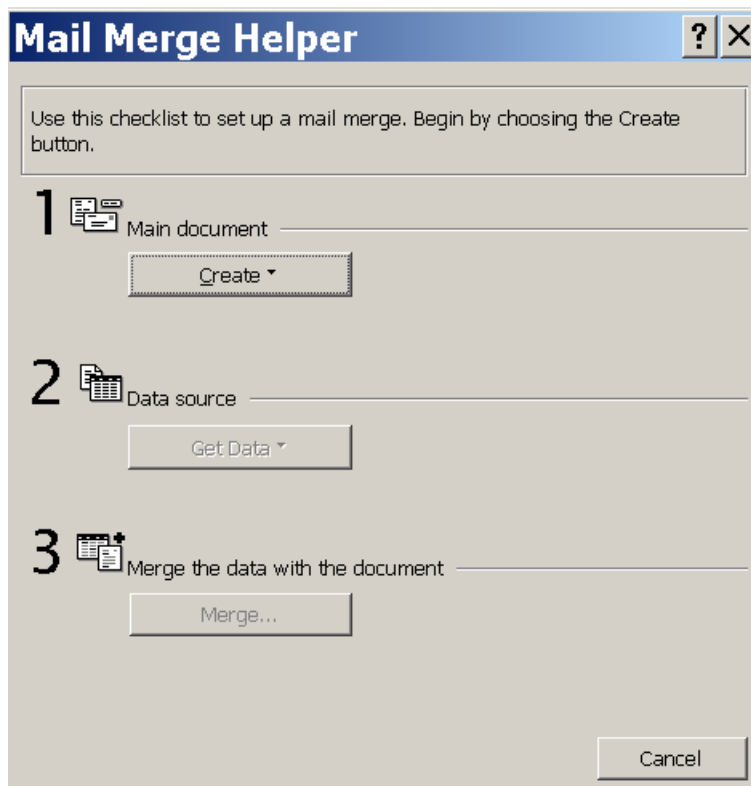
Tuesdays through Fridays  
From 8 AM to 10 AM  
At all of our clinic locations  
The entire month of September

The saying – “an ounce of prevention is worth a pound of cure” - is especially true when referring to the flu. After you receive your shot, please stay for some fresh-brewed Starbucks coffee and other refreshments!

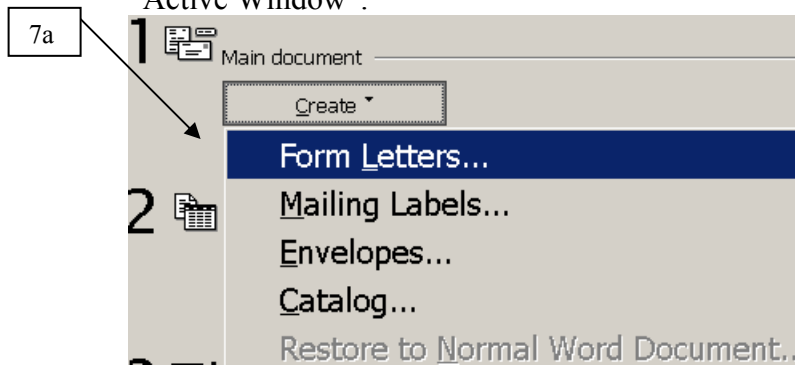
Sincerely,

Your Community Health Center Improvement Team

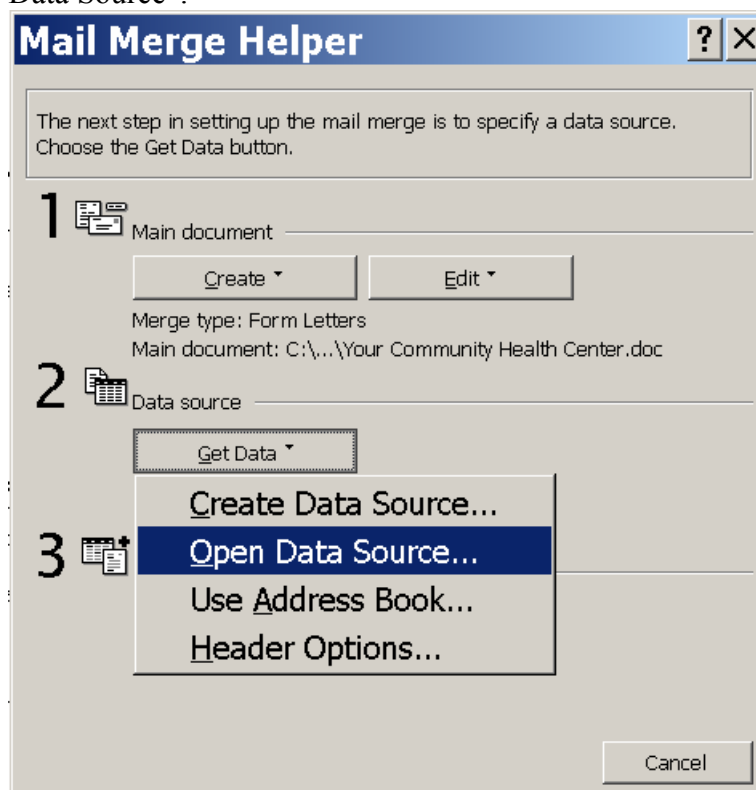
6. With the document open, click on “Tools” and then “Mail Merge” from the main toolbar at the top of the screen. The below screen should appear. Follow the steps to complete the mail merge.



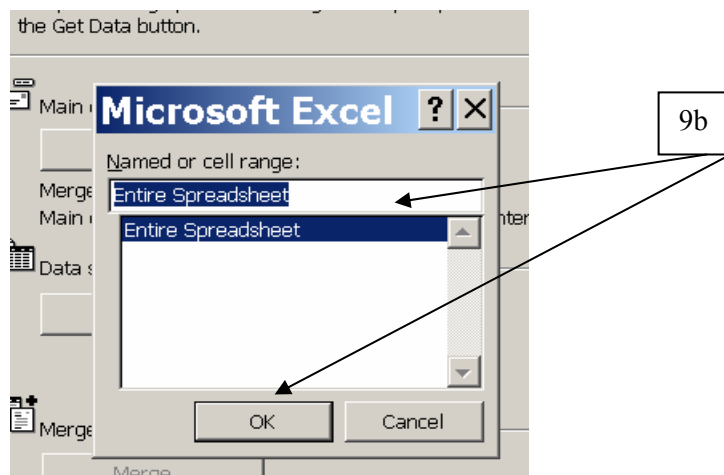
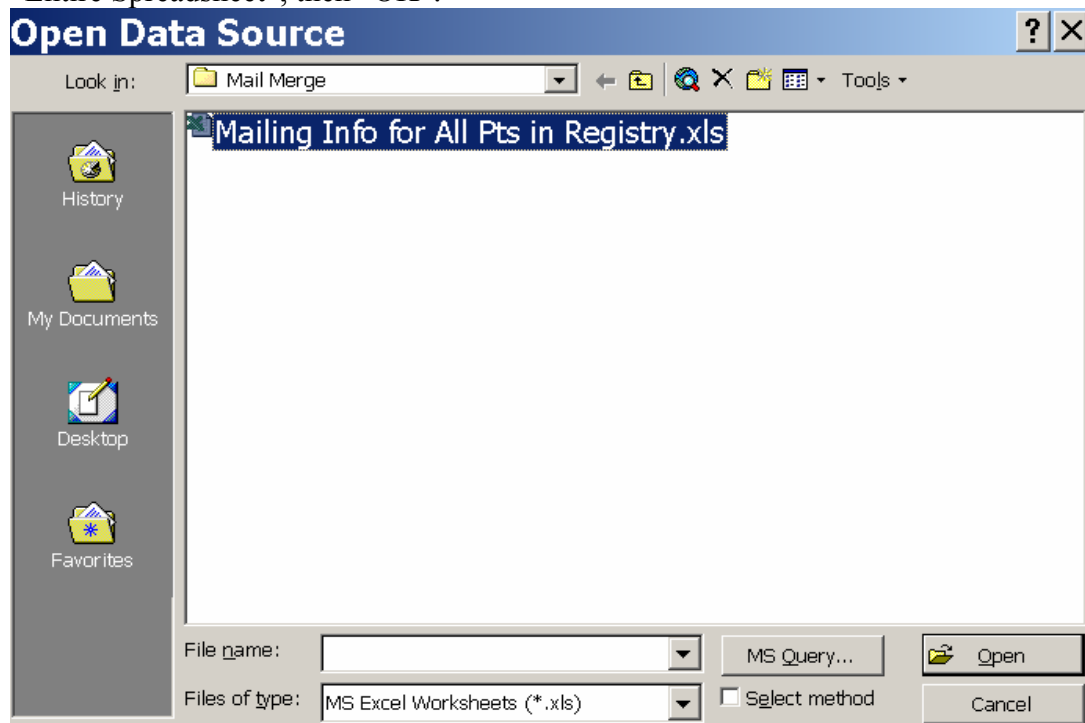
7. a.) Under “Main document” click “Create” and then “Form Letters”. You may either use an existing main document or create a new one. We’ll use the one we just created. b.) Click “Active Window”.



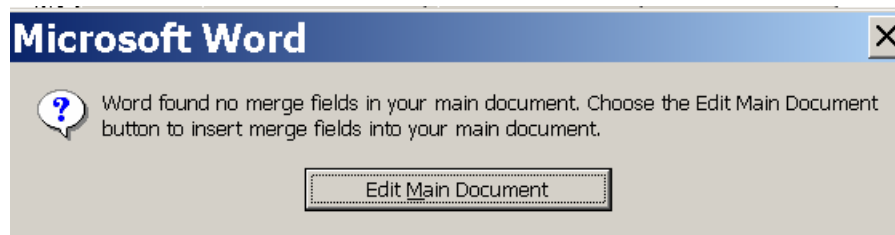
8. The data source contains the data that varies in the merged documents - for example, name and address of each recipient of a form letter. The data source in this exercise is the “Mailing Info for All Pts in Registry” report you ran in PECS and saved. Click “Get Data” and then “Open Data Source”.



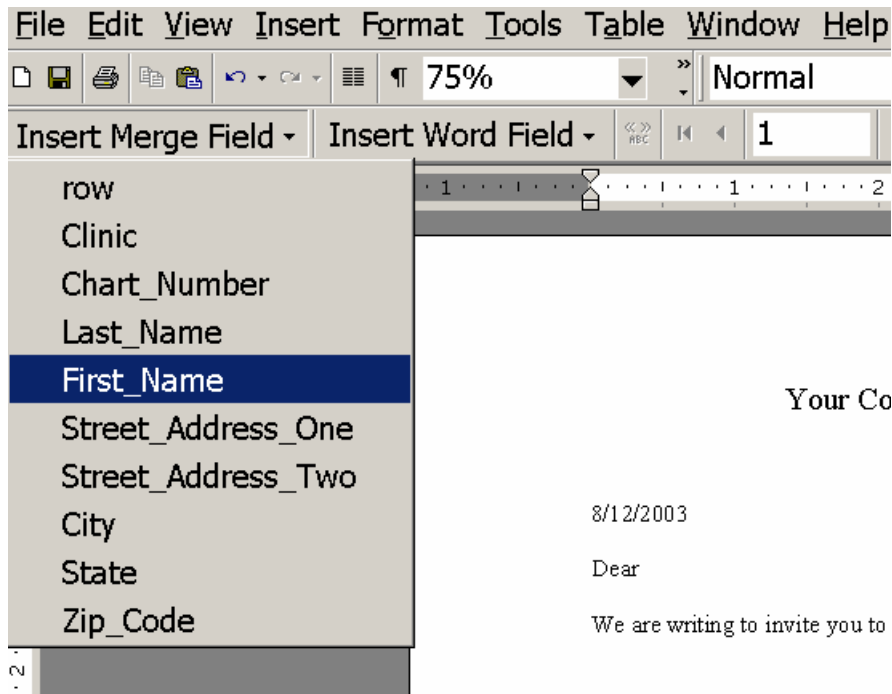
9. a) Navigate to the saved PECS report and click “Open”. b) For “Named or Cell Range”, choose “Entire Spreadsheet”, then “OK”.



10. Clicking on “Edit Main Document” allows for the association of the merge fields from the data source to the main document.



- In the main document, insert merge fields, which are placeholders that tell Microsoft Word where to insert data from the data source. Place your cursor at a point where you want a field to populate, and then select the field you want from the drop-down list of merge fields. Repeat until you have populated the main document with the fields needed.



- The resulting main document should be similar to this one. Notice the merge fields.

**Your Community Health Center, Inc.**  
**123 Main Street**  
**Anytown, Anystate**

8/12/2003

«First\_Name» «Last\_Name»  
«Street\_Address\_One»  
«Street\_Address\_Two»  
«City», «State» «Zip\_Code»

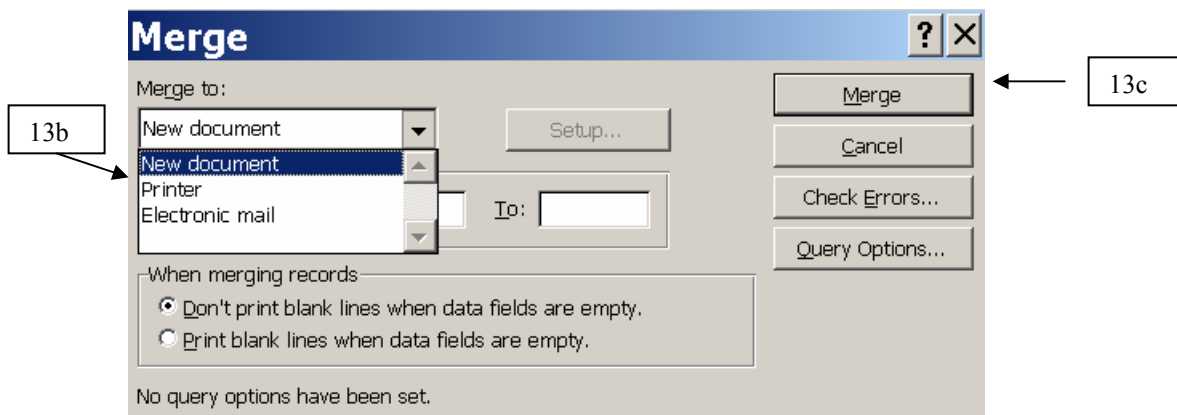
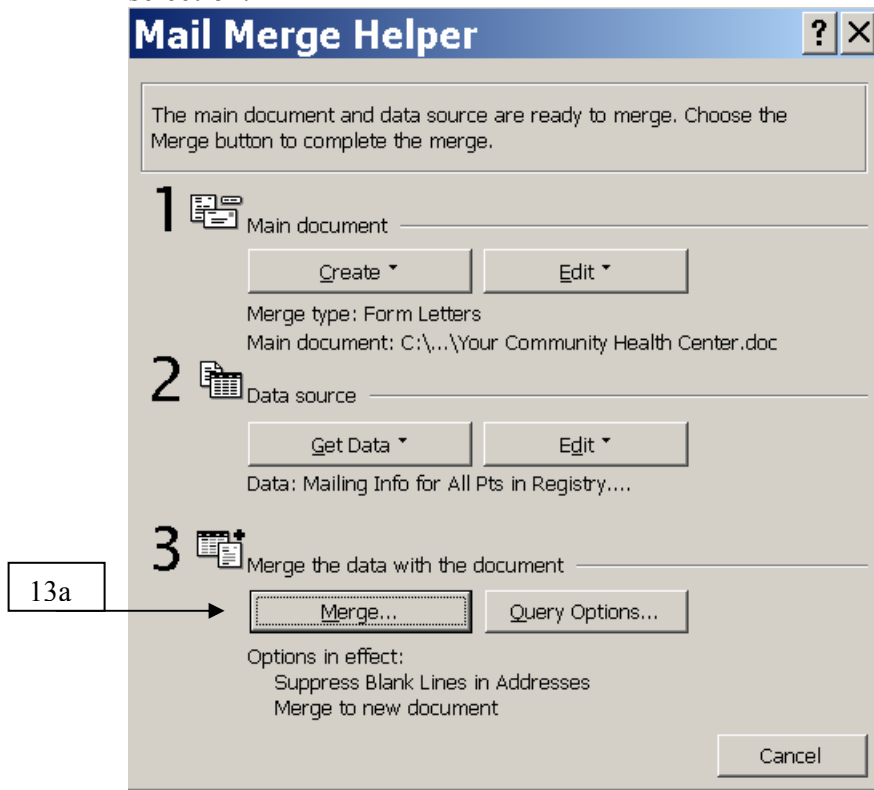
Dear «First\_Name»:

We are writing to invite you to one of our flu shot clinics that will be held

Tuesdays through Fridays  
9:00 AM - 12:00 PM

Merge fields

13. a) Merge the data from the data source into the main document. Each row (or record) in the data source produces an individual form letter. b) You can send the merged documents directly to a printer or to e-mail addresses; or you can collect the merged documents into a new document so you can review and print them later. c.) Click “Merge” after making your selection.



You should now have form letters for each row of data in your PECS report!