

## **Single Mail Merge Document from Patient Information Form**

- 1) \* Go to the Patient Information Form and click on the “W” button.  
(this will bring up your Word Mail Merge Documents form)
- 2) Click on a Document Code (for example: QM\_PATIENTLET) then click on the “+” button. This will bring up a dialog box that says: “Are you sure you want to create a new document based on the document ‘QM\_PATIENTLET’?.... Click “Yes”
- 3) The system will bring up a dialog box for saving a file. In this dialog box choose a drive that is accessible to other workstations on the network. This may be your “Q” drive.
- 4) If this is the first time you do this, you might want to click on the “Create new folder” button, and create a folder called “mailmerge” (for example)
- 5) Within this mailmerge folder, specify a file name to save, Collection1.doc (for example)
- 6) This will make an entry in your Word Mail Merge Documents form. In the Document Code field for this entry (Remember to always enter it with a .DOC extension).
- 7) Specify the Document Type (select “PATIENT”), and enter a description of this entry. (for example: Collection Letter 1)
- 8) You may now edit the document by selecting the Document Code and clicking on the “Edit Document” button. Modify the document to meet your needs and use the “Insert Merge Field” drop down to insert specific QuickMed database fields in your document. Make sure you save the changes to your document.
- 9) To generate the letter, click the “W” button and select the Document Code from the Word Mail Merge Documents form and click “OK”. Once the document appears, click on the “Merge” button. Then click on the “Merge” button on the Merge form, and your letter will be generated on your screen.
- 10) Select File | Print to print your letter.

\* Although this document describes how to perform a word mail merge from the Patient Information Form, mail merges can be performed from other parts of the system. For example: Patient Mailing List Wizard, Appointment Reports, and Superbill Generator.

Note: Avoid using spaces and special characters in your folder and file names (use underscore instead of blanks).