

## Creating Letters with Optomate Premier

Since the introduction of Optomate Premier Series, the format of letters can now be customised within the Optomate program without the need to merge into an external word processing program.

The letters module allows you to create:

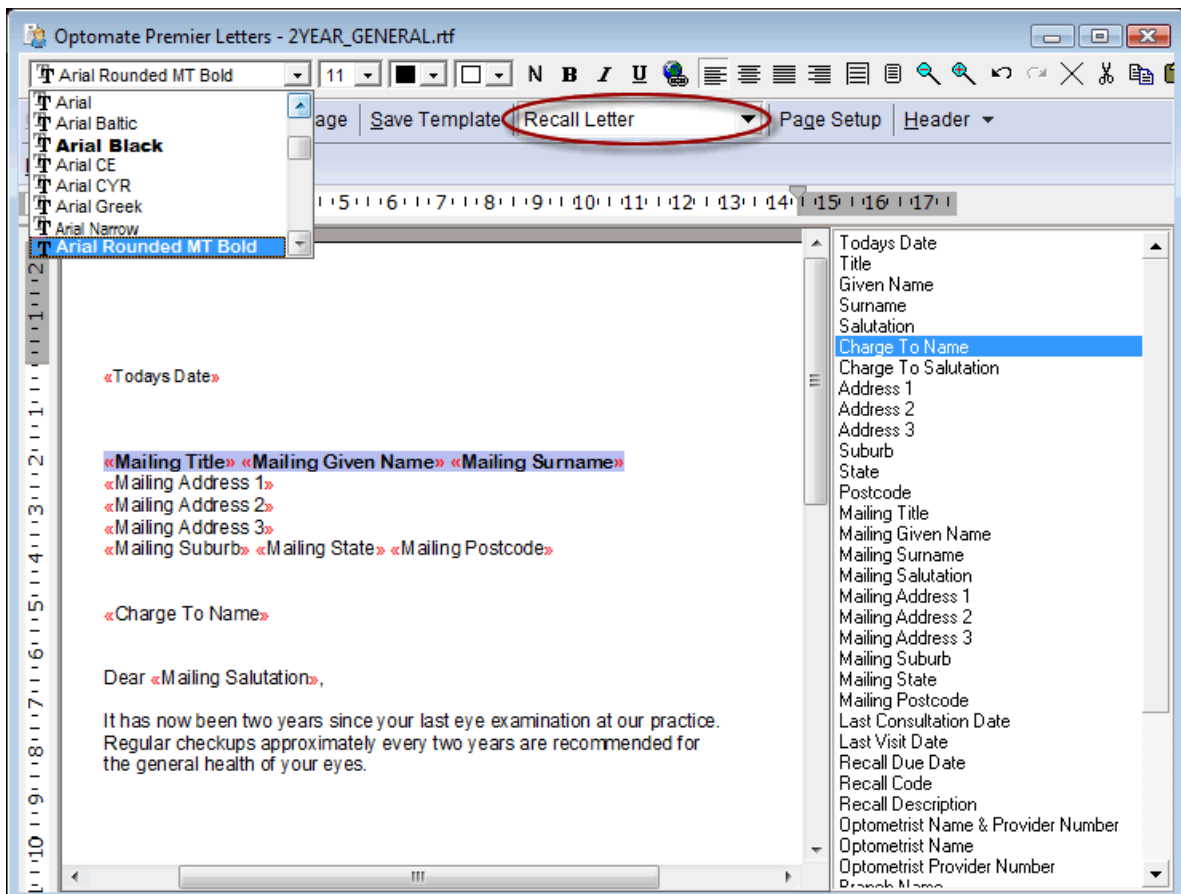
- ▶ **Patient Letters**  
Patient Letters are used when you want to send an individual letter to a Patient, or a Referral Letter.
- ▶ **Marketing Letters**  
Optomate has an in-built Marketing Wizard that allows you to create Letters for Direct Marketing, based on specific patient attributes.
- ▶ **Overdue Account Letters**  
Allows you to send Overdue notices to Patients with Overdue Accounts. You can create separate letters for 30days, 60days, 90days etc.
- ▶ **Recall Letters**  
When creating letters for Recalls, you need to create a separate letter for each Recall Type, as well as separate letters for Subsequent Recalls. For further instructions on Recall Letters, please refer to our help note [Setup and Printing Recall Letters](#)

### Step A - Setting up Letter Templates

To create a new Letter Template, go into: **Setup ▶ General ▶ Letter Templates, OR:**

**Patient Letters** – In the Patient Screen, select **New ▶ Patient Letter** or click [Letter]

**Marketing Letters** – In the Marketing screen, select **New ▶ Marketing Letter**



1. Select the Type of letter you are creating from the drop down menu as circled above. To alter the page size, orientation and margins click on the [Page Setup] button.
2. You will most likely want to include the patients' details at the top of the letter. By default you should always use the 'mailing' fields to ensure that a patients' mailing address is used (if no mailing address is entered for a patient, their general address will still appear). \*Also, include the 'Charge to Name' field which will print "*In relation to (patients' name)*" if there is a 'Charge To' person entered on the patient file (i.e. In the case of a child patient). To add fields, simply double-click on the item in the right menu, ensuring that you include a space between each field, for example:

<<Mailing Title>> << Mailing Given Name>> << Mailing Surname>>  
<<Mailing Address 1>> << Mailing Address 2>> << Mailing Address 3>>  
<<Mailing Suburb>> <<Mailing State>> <<Mailing Postcode>>

3. Below this you can type the body of your letter. To change the typeface or any other formatting, select the text you wish to change followed by your desired settings.
4. Once you are happy with your letter, click on the [Save Template] button at the top and save where appropriate within the Documents folder.

**NOTE:** If you want to edit an existing letter, click [Open Letter Template] and select your document. Simply save the template with the same name when you are done. If you want to use an existing letter but alter it for a different template, make the changes then save with a new name.

## Step B – Printing the Letters

### Patient Letters/ Referral Letters

Once you have created the Patient Letter Template in Step A, you can produce a Patient Letter.

1. Go into the Patient file and click on the [Letter] button at the top of the screen.
1. Click on [Open Letter Template]
2. The Merge Fields will automatically update with the patient details.
3. Make any changes required then click [Save Letter] – the letter will automatically be named the Patients' last name, followed by Patient Number, today's date, then letter number.  
**e.g. 'SMITH112\_220807\_1.rtf'**

To open previous Patient Letters, go to the 'Letters' tab for the required Patient and double click on a letter in the list.

## Marketing Letters

Once you have created a Marketing Letter Template in Step A, you will need to create a new Marketing List to target specific Patients:

1. Click on the Marketing icon from the main screen.
2. Click on the New [▼] button and select **Marketing List**  
The Marketing Wizard will open. Click through and enter any specific information you want to base the marketing on. When you get to the end, click on [Build List].
3. The Marketing Wizard will display the Patients in the list.  
By default All Patients will be ticked to Include in the Marketing list.  
You can un-tick any that you don't want to include.
4. Specify a **List Name** and **List Description** that will be referenced in the following step then click [Done].

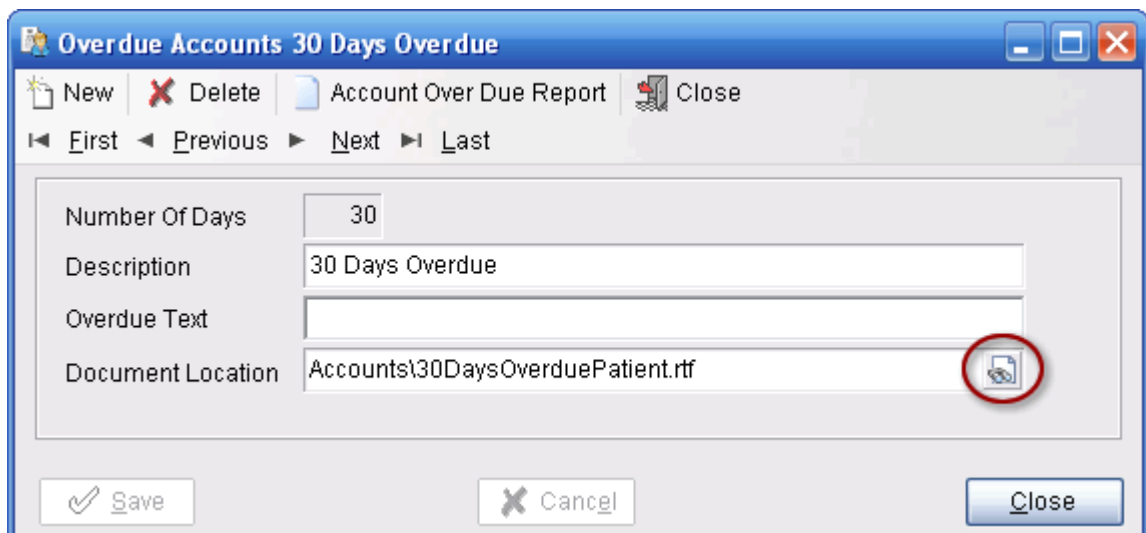
Create the Marketing Letters using the existing Template and Marketing List:

1. Click on the Marketing icon from the main screen.
2. Click on the [Marketing Letters] button.
3. Select the **Table Name** (List Name) and the **Marketing Letter** and click [Print].

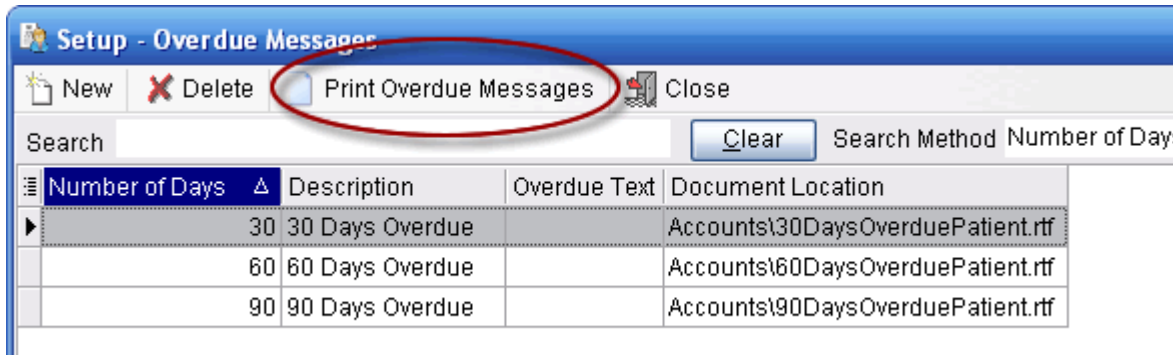
## Overdue Account Letters

Once you have created the Overdue Account letter templates in Step A, you will need to go into setup and link the corresponding letter to each Overdue Account Type:

1. Go to **Setup ► Patients ► Overdue Messages**
2. Click on the [New] button. The window as shown below will open.
3. Enter the Number of Days overdue, along with a Description.
4. Click on the Browse button (as circled) and locate the corresponding Letter Template.
5. Save and Close.



The Overdue Messages Setup screen will display a list of the Overdue Types you have setup in Optomate. To print a list of these, click the [Print Overdue Messages] button.



### Printing the Overdue Account Letters

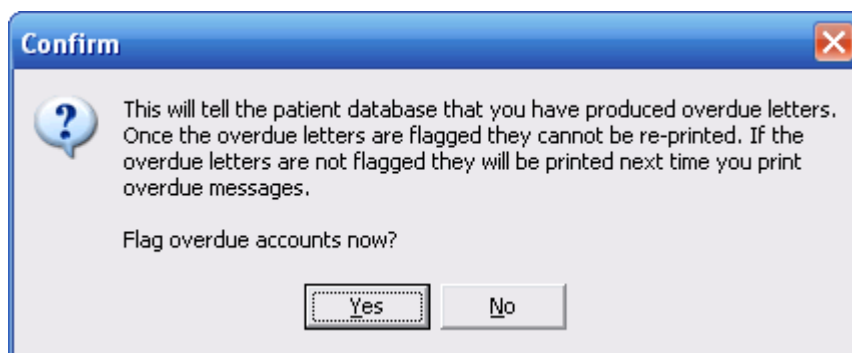
1. In the Patient screen, Click on the Overdues [▼] button and select **Print Overdue Letters**.
2. Once the letters have been printed, you can print out the Patient Labels for sending. Click on the Overdues [▼] button and select **Patient Labels**.

Labels will be printed in either Alphabetical Order or Postcode Order. To alter your order preference, go into **File ► Printer Settings**, click on the 'Report' Tab then adjust the 'Mailing Labels Order'.

3. Once you have printed the Letters and Labels, you need to Flag the letters as sent. Click on the Overdues [▼] button and select **Flag Overdue Accounts**.

#### **IMPORTANT:**

Flagging cannot be reversed. Please ensure that all letters are sent before flagging.



### Recall Letters

Please refer to our help note [Setup and Printing Recall Letters](#)