

# Appendix E: Printing Follow-Up Letters Using Mail Merge - Office 2013

From the Reports submenu, create Follow-up Labels using whatever criteria you wish. At the bottom of the screen, change "FollowUp Mailing Letter format?" to "yes" in order to generate letters instead of labels.

The screenshot shows a web browser window titled "CPDMS - Mozilla Firefox" with the URL "https://kcrpcdms.net/cpdms-5485/Reports/FollowUp.php?report\_id=FollowUpLabelsPatName". The page header includes "CANCER PATIENT DATA MANAGEMENT SYSTEM .net", "TONYA BRANDENBURG", "TRAINING DATABASE", and "Follow-Up Labels".

The main form contains the following fields and options:

- Report reference date:** 06 / 25 / 2015
- Follow-up Interval (months):** 12
- Registry reference year:** 0
- FU Method:** ☒ Primary ☐ Secondary
- Include cervix cases stage CIS?:** ☐ Yes ☒ No
- Case class codes to report:** A list box with "All Analytic", "Select All", and "Unselect All" buttons. It contains three checked items:
  - ☒ 00 Initial dx here AND all tx elsewhere
  - ☒ 10 Initial dx here or in staff phys. office AND part or all first tx here OR no tx/tx unkn
  - ☒ 11 Initial dx in staff phys. office AND part of first tx here
- Report cases with last names:** A text box containing "A"
- through:** A text box containing "Z"
- Sort by FollowUp Physician?:** ☐ Yes ☒ No
- FollowUp Mailing Letter format ?:** ☒ Yes ☐ No

Below the form, a message states: "Mailing labels will not be generated for patients who are not to be contacted." At the bottom are "Submit" and "Cancel" buttons.

As seen below, the output for follow-up letters, as displayed in CPDMS.net, appears identical to the label output. However, when the report is saved as .csv file, the format will be optimized for letters rather than labels.

CPDMS - Mozilla Firefox

https://kcrpcdms.net/cpdms-5485/Reports/FollowUpMaster.php

**CANCER PATIENT DATA MANAGEMENT SYSTEM .net**

TONYA BRANDENBURG      TRAINING DATABASE      Follow-Up Labels

**TRAINING DATABASE : 0000090201**  
**Case Classes Included: All Analytic 00 - 22**  
**Cervix Cases Staged As Insitu Are Not Included**  
**Patients With No Follow-Up For Months Prior To 06/25/2015**  
**Registry Reference Year = All**  
**Report Sorted By: LastName,FirstName**

ABE, MOHAMMAD Z	ABE, MOHAMMAD Z
Address1	Testis 02/20/1997
Address2	REG ACC # : 19970695 SEQ # : 1
HOSKINSTON, KY 40844	BD: 07/01/1969 DLC: 06/21/2011
JACKSON, SUSAN	ABE, MOHAMMAD P
8 MEDICAL CIRCLE	Kidney 10/08/1999
GEORGETOWN, KY 40324	REG ACC # : 19991125 SEQ # : 1
	BD: 08/27/1934 DLC: 04/04/2013
	MD: DOC3 JACKSON
LastName, FirstName	ABE, MOHAMMAD E
Address1	Liver 07/28/2000
Address2	REG ACC # : 20000403 SEQ # : 1
CROPPER, KY 40057	BD: 10/05/1953 DLC: 08/29/2000

Save    Print    Cancel    Main

Choose the "Save" button and a dialog box will appear with the default filename "Labels.csv" and "comma separated" as the specified file format. The filename may be changed to whatever you wish, but be sure to preserve the .csv extension.

DOWNLOAD REPORT - Mozilla Firefox

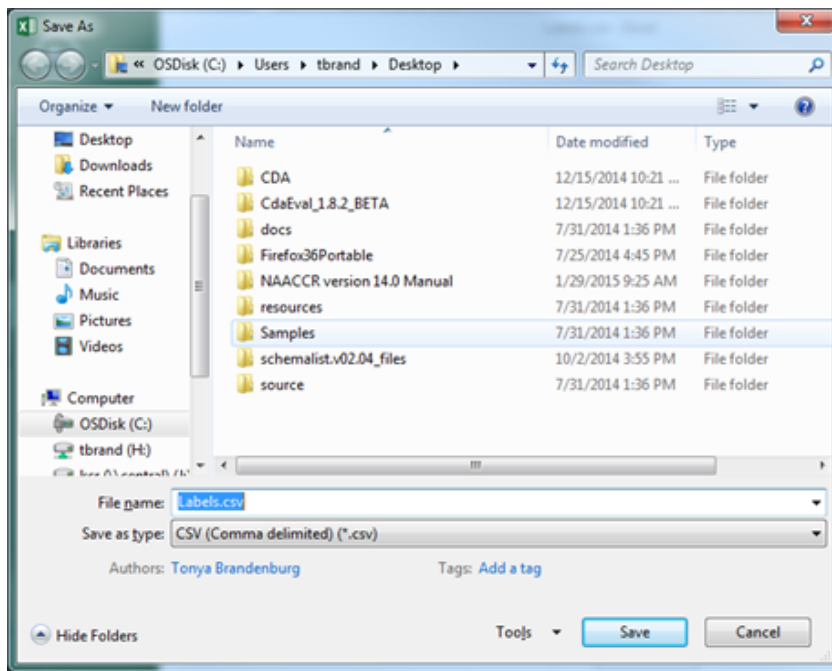
https://kcrpcdms.net/cpdms-5485/Reports/Include/GetFil

**File Name :** Labels.csv

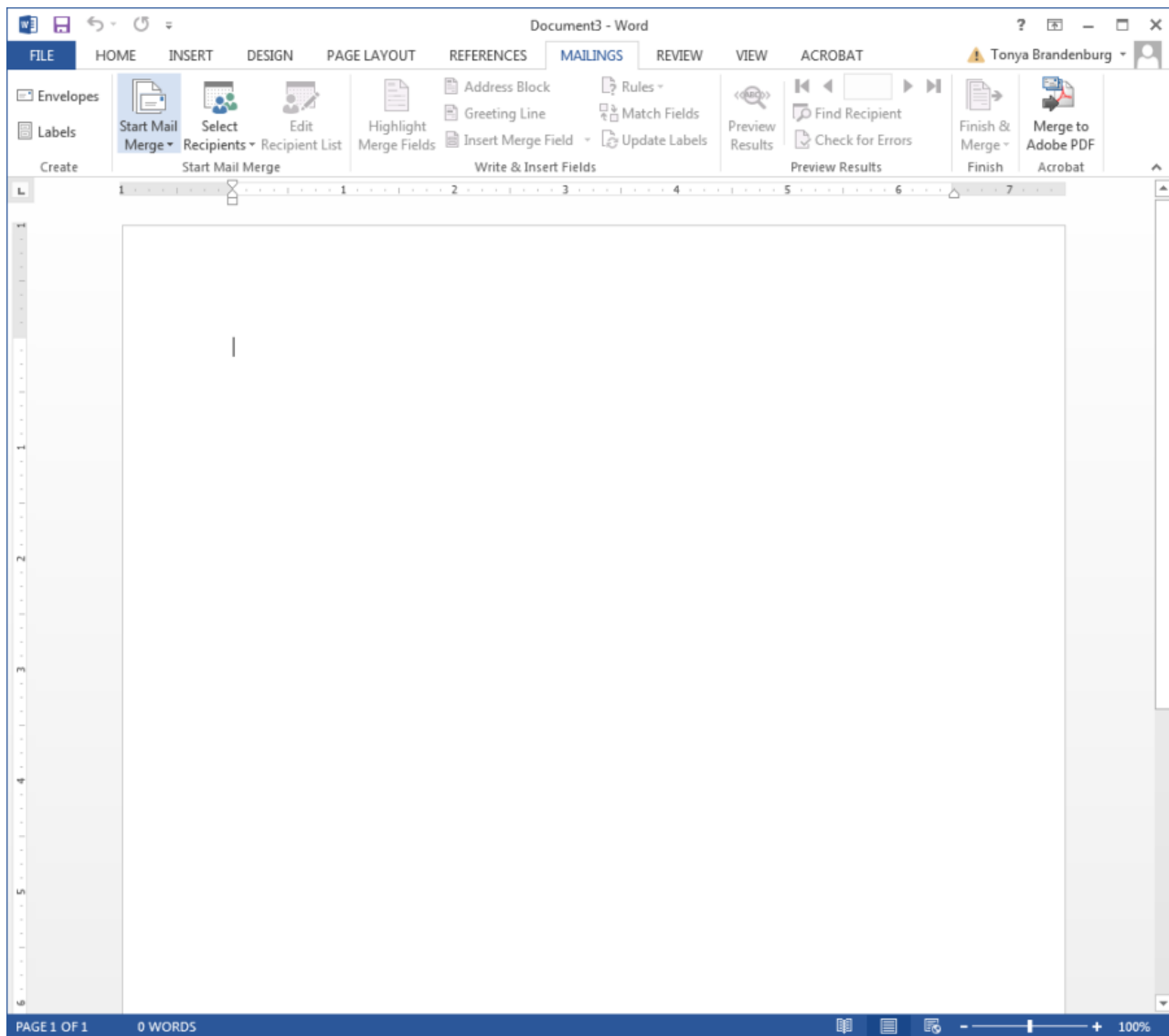
**File Format :** ☒ Comma Separated  
☐ Pre Formatted

Submit    Cancel

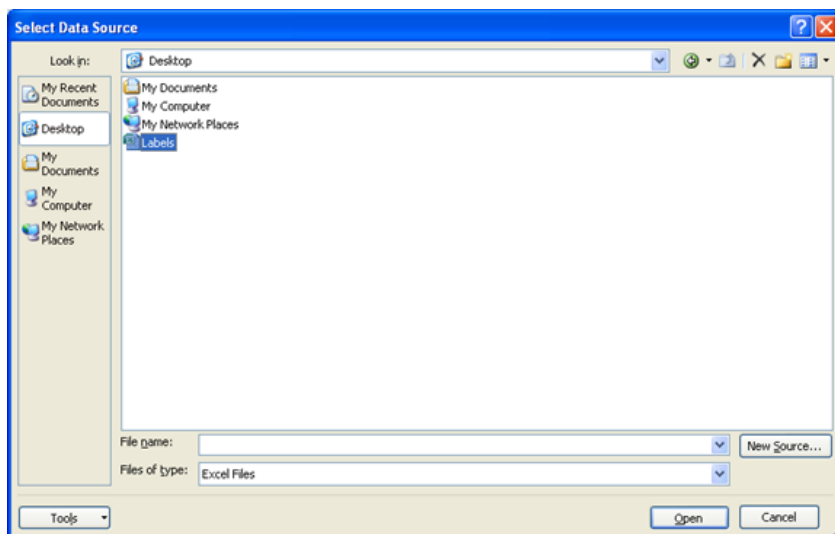
Select "Open with" and then "Save As" to save the file to the desired location on your own computer or network drive. In the screen below, for example, the file is saved to the user's computer desktop.



Now open Microsoft Word, click the "Mailings" tab, then the "Start Mail Merge" button and "Letters."



Next, from the "Mailings" menu, choose "Select Recipients" and "Use Existing List." The "Select Data Source" dialog box is now displayed. Highlight the file and click on "Open."



In order to add the names and addresses of the physicians to each letter, click on "Address Block" in the "Write and Insert Fields" section of the Mailings menu. A dialog box opens, as seen below:

**Insert Address Block**

**Specify address elements**

☒ Insert recipient's name in this format:

Josh  
Josh Randall Jr.  
Josh Q. Randall Jr.  
Joshua  
**Joshua Randall Jr.**  
Joshua Q. Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address  
☐ Always include the country/region in the address  
☒ Only include the country/region if different than:  
United States

☒ Format address according to the destination country/region

**Preview**

Here is a preview from your recipient list:

1

Click on "Match Fields" to fill in the address blocks with the data from the Excel spreadsheet.

Now the "Match Field" dialog box is available. Use this box to format the address properly.

**Match Fields**

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched)
Courtesy Title	(not matched)
First Name	ITEM1
Middle Name	ITEM1
Last Name	(not matched)
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	ITEM2
Address 2	(not matched)
City	ITEM3
State	ITEM4

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☐ Remember this matching for this set of data sources on this computer

OK Cancel

In the follow-up letter format, Item 1 contains both first name and last name, so leave First Name as 'not matched' and select Item 1 from the drop-down box next to Last Name. Item 2 contains the address, so select Item 2 from the drop-down box next to 'Address 1.' Item 4 contains city, state, and ZIP code, so select Item 4 from the drop-down box next to 'City.' Leave all other segments of the address block as 'not matched.'

Once you have assigned each item to its corresponding place in the address block, the "Match Fields" dialog box should appear as it does in the example below. Check the box labeled "Remember this matching..." in order to preserve this address block format for future follow-up letter mail merges. Click "Ok" to go on to the next step.

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Unique Identifier	(not matched)
Courtesy Title	(not matched)
First Name	ITEM1
Middle Name	ITEM1
Last Name	(not matched)
Suffix	(not matched)
Nickname	(not matched)
Job Title	(not matched)
Company	(not matched)
Address 1	ITEM2
Address 2	(not matched)
City	ITEM3
State	ITEM4

Use the drop-down lists to choose the field from your database that corresponds to the address information Mail Merge expects (listed on the left.)

☒ Remember this matching for this set of data sources on this computer

OK

Cancel

The address block is now previewed. If any part of the address block is incorrect or misaligned, click on "Match Fields" to repeat the previous steps. The arrow buttons above the preview address block can be used to scroll through the addresses in order. Click "Ok" to proceed.

Insert Address Block

Specify address elements

☒ Insert recipient's name in this format:

Josh

Josh Randall Jr.

Josh Q. Randall Jr.

Joshua

Joshua Randall Jr.

Joshua Q. Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address

☐ Always include the country/region in the address

☒ Only include the country/region if different than:

United States

☒ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

1

BOB WHITE  
124 MAPLE  
LEXINGTON,KY 45555

Correct Problems

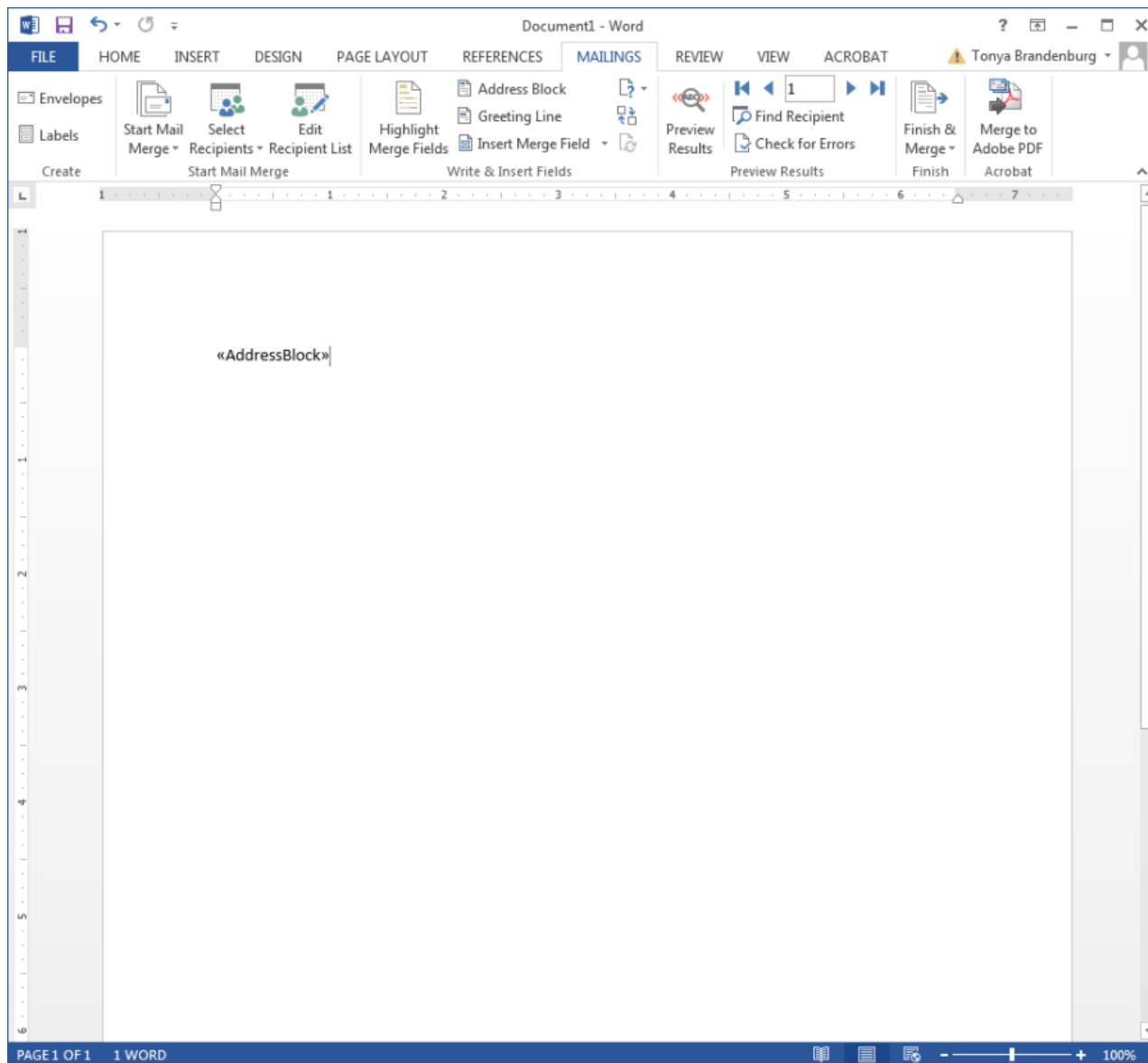
If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK

Cancel

As seen below, '<<AddressBlock>>' appears in the upper left of the page. This is where the name and address of the person to whom the follow-up letter is addressed will appear.



The cursor is immediately to the right of the address block. Hit 'Enter' to move to the next line and click on "Greeting Line" in the "Write and Insert Fields" section of the Mailings Menu.

The "Insert Greeting Line" dialog box is now displayed. Click on "Match Fields" and select Item 1 from the drop-down box to the right of First Name.

The name of the first letter recipient is previewed, as seen below. Subsequent greetings can be previewed using the forward and back arrows above the preview.

Insert Greeting Line

Greeting line format:  
Dear Joshua Randall Jr. ,

Greeting line for invalid recipient names:  
Dear Sir or Madam,

Preview

Here is a preview from your recipient list:

1

Dear ABE, MOHAMMAD Z ,

Correct Problems

If items in your greeting line are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

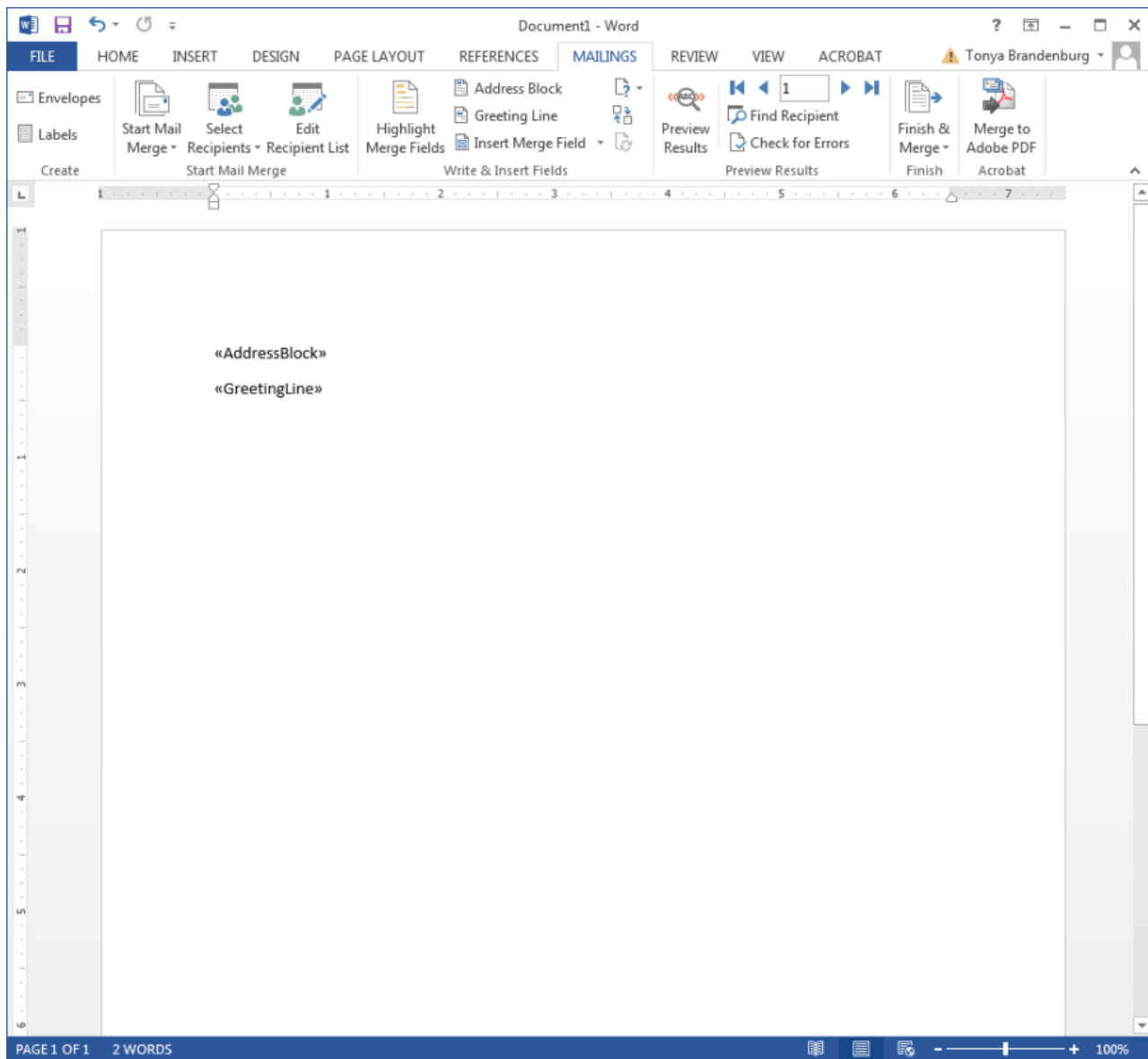
Match Fields...

OK Cancel

Click "Ok" to insert the greeting.

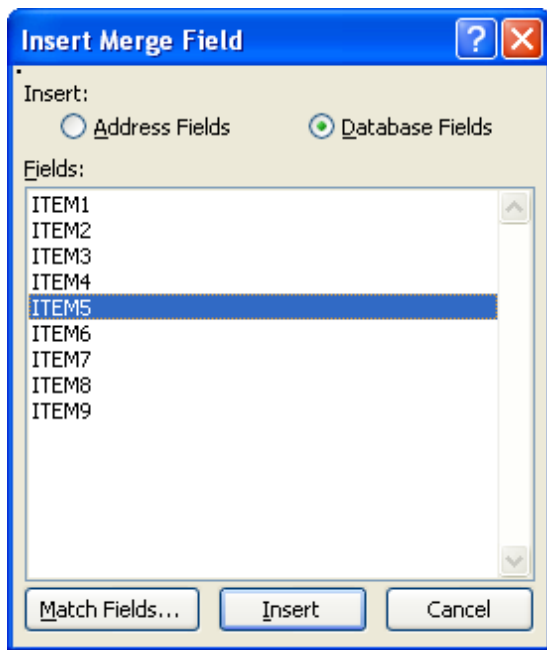
Now the Greeting Line is visible. Hit 'Enter' to move to the next line.



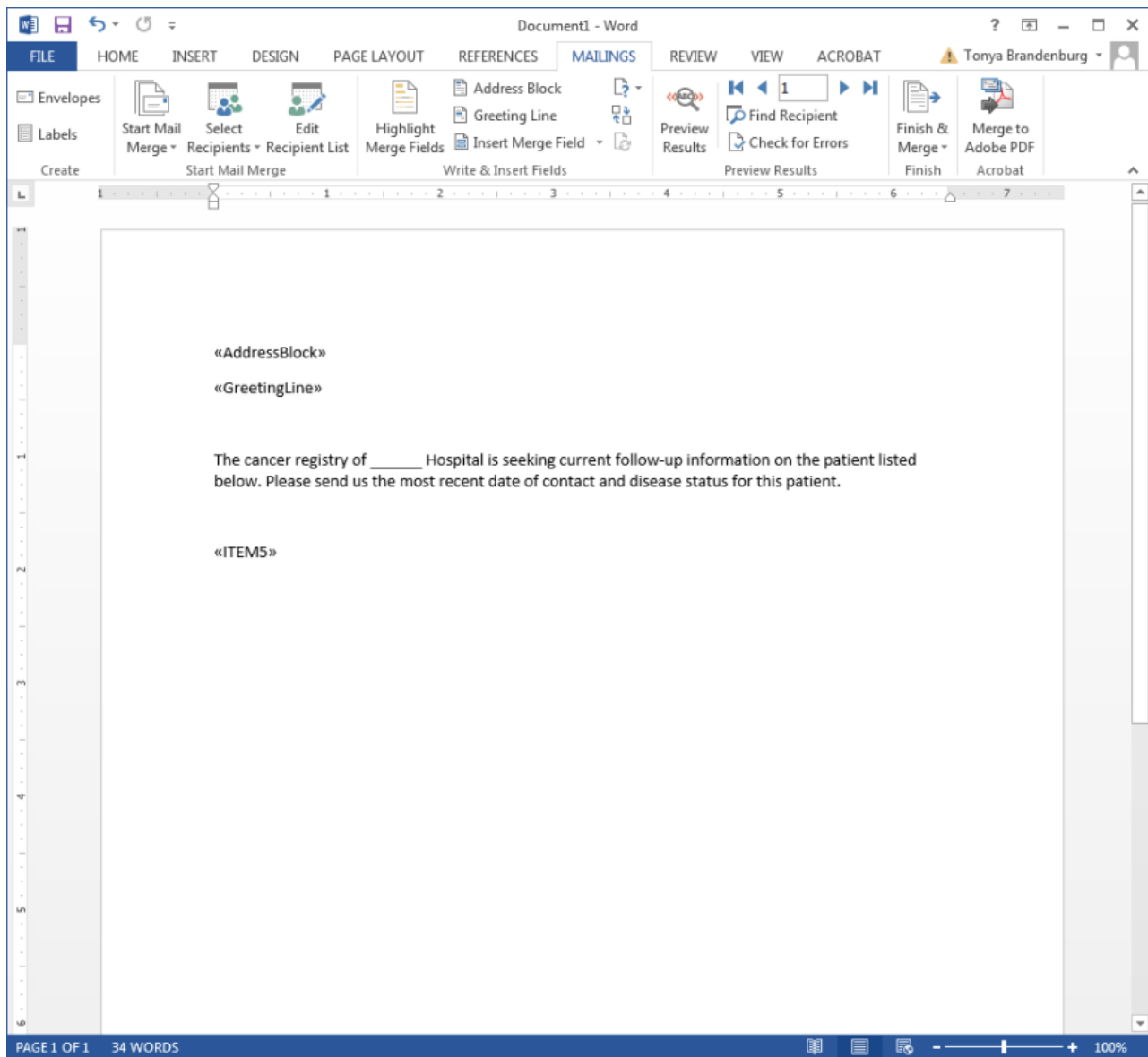


At this point, type the body of your follow-up letter.

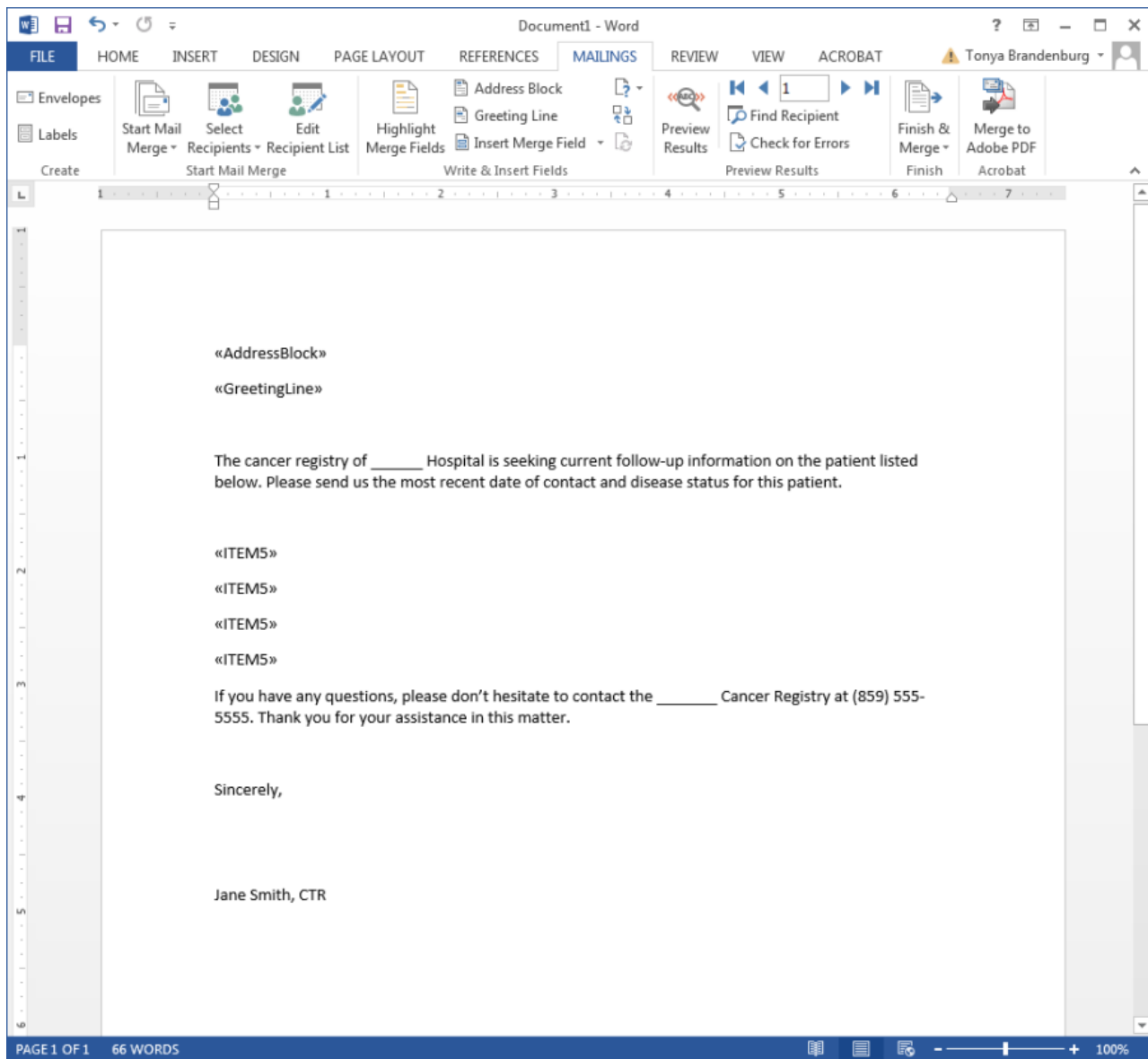
In order to insert the fields for the name and information of the patient for which you are seeking follow-up, place the cursor in the area of the letter where you wish this information to appear, and click on "Insert Merge Field" from the "Write and Insert Fields" menu. The dialog box seen below should appear. Click on Item 5 to list the patient's first and last name. Then click "Insert" and "Close."



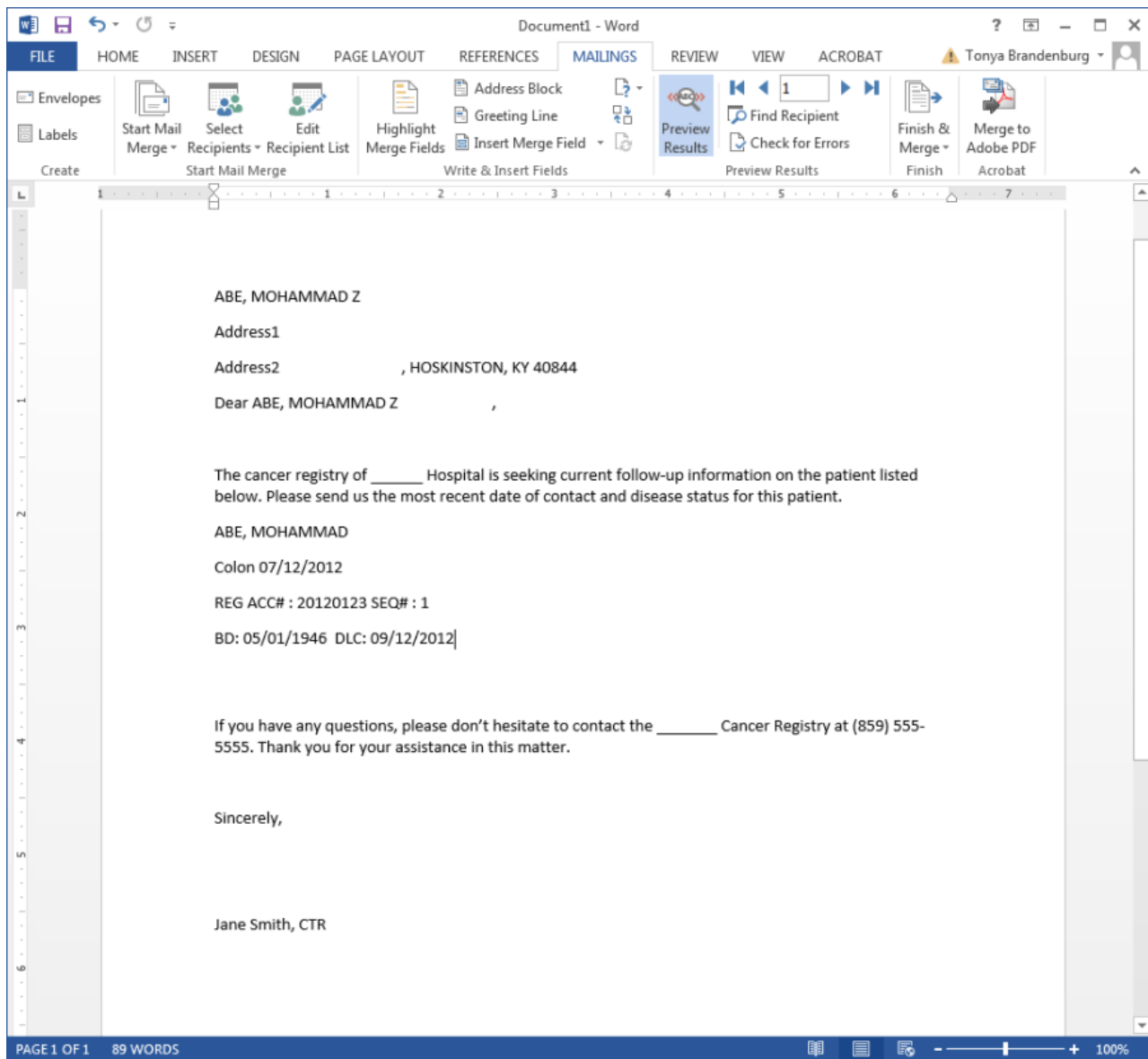
"Item 5" now appears where the patient's name will be listed. Repeat this process to add as many fields as you wish. Item 6 contains type of cancer and diagnosis date, Item 7 the registry accession number, Item 8 the date of birth and date of last contact, and Item 9 the physician's name.



After you have inserted all the patient fields, complete the body of the letter. The finished letter will look something like the example seen below.



Click the "Preview Results" button in the "Preview Results" section of the Mailings Menu. The fields will be shown filled in, as seen below.



You may use the left and right arrows in the "Preview Results" submenu to view subsequent letters. If you wish to make any changes to the address block, greeting lines, or the merge fields, repeat the previous steps.

Click on "Finish and Merge" in order to print the follow-up letters. You may also use mail merge to create labels for the envelopes, or you may position the address block such that it will be displayed in the window of an envelope.