QUICK GUIDE TO PRINTING FOLLOW-UP LETTERS USING MAIL MERGE IN OFFICE 2007

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.

CPDMS - Windows Internet Explorer		×
https://cpdms.net/cpdms/Reports/FollowUp.php?report_id=FollowUpLabelsPa	tName 🔽	
CANCER PATIENT DATA	MANAGEMENT SYSTEM .net	
EMILY REED TRAININ	NG DATABASE Follow-Up Labels	
Report reference date:	11 / 07 / 2008	
Follow-up Interval (months):	12	
Registry reference year:	2000	
FU Method	Primary Osecondary	
Include cervix cases stage CIS?:	○Yes ⊙No	
Case class codes to report	✓	
Report cases with last names:	A	
through:	В	
Sort by FollowUp Physician?:	○Yes ⊙No	
FollowUp Mailing Letter format ?:	⊙Yes ○No	
Submit	Cancel	
Done	🏹 🌍 Internet 🔍 100% 👻	

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.

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e	https://cpdms.net/cpdms/Reports/FollowU	oMaster.php	~	
	CA	NCER PATIENT DATA MANAGEMENT SYSTEM .net		1 🔒
	EMILY REED	TRAINING DATABASE	Follow-Up Labels	
l '				9
		TRAINING DATABASE : 0000123456 Case Classes Included: ALL		
		ervix Cases Staged As Insitu Are Not Included		
	Patients	With No Follow-Up For Months Prior To 11/07/2008 Registry Reference Year = 2000		
		Report Sorted By: LastName, FirstName		
	WHITE, BOB	ABE, MOHAMMAD Q		
	124 MAPLE LEXINGTON, KY 4555	Colon 07/12/2007 REG ACC # : 20070619 SEQ # : 1		
	LEXINGTON, RT 455	BD: 05/01/1943 DLC: 09/07/2007		
		MD: DOC2 WHITE		
	WHITE, BOB	ABE, MOHAMMAD I		
	124 MAPLE	Bladder 12/07/2000		
	LEXINGTON, KY 4555			
		BD: 04/05/1937 DLC: 05/02/2006		
		MD: DOC2 WHITE		
	WHITE, BOB	ABE, MOHAMMAD T		
	124 MAPLE	Kidney 04/23/2007		~
		Save Print Cancel Main		_
Do	ne	🏹 😜 Internet	🔍 100%	•

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 Webpage Dialog 🛛 🔀						
🙋 https://cpdms.	🕗 https://cpdms.net/cpdms/Reports/Include/GetFileNameType.php?C 🗙 🔒						
File Name :	Labels.csv						
File Format : Comma Separated							
	O Pre Formatted						
	Submit Cancel						
https://cpdms.net/c	pdms/Reports/Include, 😜 Internet 🛛 🔒 SSL						

Select "Submit" and then "Save" 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.

Save As				? 🛛
Savejn:	🞯 Desktop	~	3 🕫 🔁	•
My Recent Documents Desktop My Documents	My Documents My Computer My Network Pla	ces		
	File <u>n</u> ame:	Labels	~	<u>S</u> ave
My Network	Save as <u>type</u> :	Microsoft Office Excel Comma Se		

Once the file has been saved to your computer, open it using Excel. In Excel, click the Office Button (in the top left corner) and choose "Save As" and "Excel Workbook." A dialog box will open. At this point, you can choose where to save the file and assign a different name if you wish. Once you have specified a location and name, hit "Save" and close Excel.

Save As				? 🗙
Save in:	🞯 Desktop	×	() - ()	X 📸 🎟 -
My Recent Documents Documents My Documents My Network Places	Hy Docume	ir		
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Too <u>l</u> s 🔻		(<u>S</u> ave	Cancel

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

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Home	e Insert	Page Layout	References	Mailings	Review	View	Developer	Acroba	at			0
Envelopes Labels	-	Select Edi Recipients × Recipie tart Mail Merge	it nt List Highli Merge f	ght ields	dress Block eeting Line ert Merge Fie rite & Insert I	eld 👻 🛃 U	ules ¥ latch Fields Ipdate Labels	Preview Results	Image: Second	Finish & Merge * Finish	Merge to Adobe PDR Acrobat	F
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Next, from the "Mailings" menu, choose "Select Recipients" and "Use Existing List." The "Select Data Source" dialog box is now displayed. Click the arrow to the right of "Files of type" and select "Excel Files" from the drop down menu (you may have to scroll down the list to find it). Next go to the location on your computer or network drive where the label file was saved (in the example below, the computer desktop). Highlight the file and click on "Open."

Select Data Sou	ILCE											?	×
Look in:	🞯 Desktop							~	۵.	- 🗈	×	1	-
My Recent Documents Documents My Documents My Computer My Network Places	Hy Docume My Comput My Networ Labels	iter											
	File <u>n</u> ame:									~ (New	<u>S</u> ource.	
	Files of <u>typ</u> e:	Excel Files								*			
Tools 🔹									<u>O</u> pen		c	ancel]

Next the "Select Table" dialog box will appear. Click "Ok."

Select Tab	le				? 🗙
Name	Description	Modified	Created	Туре	
💷 Labels\$		11/5/2008 3:27:11 PM	11/5/2008 3:27:11 PM	TABLE	
<					>
First row	of data contair	ns column headers	ОК		Cancel

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. Joshua Randall Jr. Joshua Randall Jr. Joshua Q. Randall Jr. Joshua Q. Randall Jr. Joshua Q. Randall Jr. V Insert company name ✓ Insert postal address: ○ Never include the country/region in the address ○ Always include the country/region in the address	Preview Here is a preview from your recipient list:
 Only include the country/region if different than: United States Format address according to the <u>destination country/region</u> 	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. <u>Match Fields</u> OK Cancel

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						
Required for Address Block	~					
First Name	(not matched) 💌 🗾					
Last Name	(not matched) 💌					
Suffix	(not matched) 💌 👘					
Company	(not matched) 💌					
Address 1	(not matched) 🛛 🖌					
Address 2	(not matched) 🛛 🔽					
City	(not matched) 🛛 💌					
State	(not matched) 🛛 💌					
Postal Code	(not matched) 🛛 💌					
Country or Region	(not matched) 💌					
Optional information						
Unique Identifier	(not matched) 🛛 💌 🔛					
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						
	K 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.'

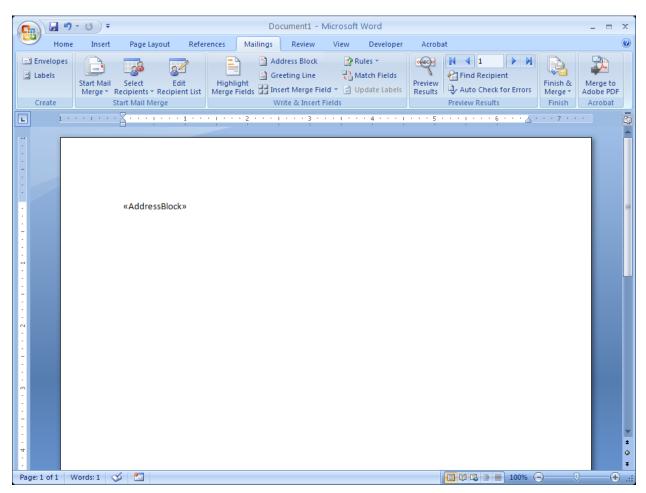
Once you have assigned each item to its corresponding place in the address block, the "Match Fields" dialog box should appear as it does in the example below. Check the box labeled "Remember this matching..." in order to preserve this address block format for future follow-up letter mail merges. Click "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							
Required for Address Block		^					
First Name	(not matched) 🛛 💌						
Last Name	ITEM1 💌						
Suffix	(not matched) 🛛 💌						
Company	(not matched) 🛛 💌						
Address 1	ITEM2 💌						
Address 2	(not matched) 🛛 💌						
City	ITEM4 💌						
State	(not matched) 🛛 💌						
Postal Code	(not matched) 🛛 💌						
Country or Region	(not matched) 🛛 💌						
Optional information							
Unique Identifier	(not matched) 🛛 💌	~					
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							
	K Cancel						

The address block is now previewed. If any part of the address block in 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. Joshua Joshua Randall Jr. Joshua Q. Randall Jr. ✓ Insert company name ✓ Insert postal address: ○ Never include the country/region in the address	Preview Here is a preview from your recipient list: I I I BOB WHITE 124 MAPLE LEXINGTON,KY 45555
 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 	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 below 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.

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:					
Dear Sir or Madam,					
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. <u>Match Fields</u>					
OK Cancel					

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:
Greeting line for invalid recipient names: Dear Sir or Madam,
Preview
Here is a preview from your recipient list:
Dear BOB WHITE ,
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.

AddressBlock» «AddressBlock» «AddressBlock» «GreetingLine]		Ţ <u>13</u> ₹		Document2 - Mi	crosoft Word					x
«AddressBlock» «GreetingLine»	H Envelopes Labels	N P Start Mail Select Merge * Recipients * Rec	Edit tipient List	Address Block Greeting Line Insert Merge Field	W L' Rules * C Match Fields * D Update Labels	Preview Results	Find Recipient Auto Check for Errors	Merge *	Adobe PDF	F
		«AddressB	lock»				<u>.</u> 6	· · · 7 · · ·		

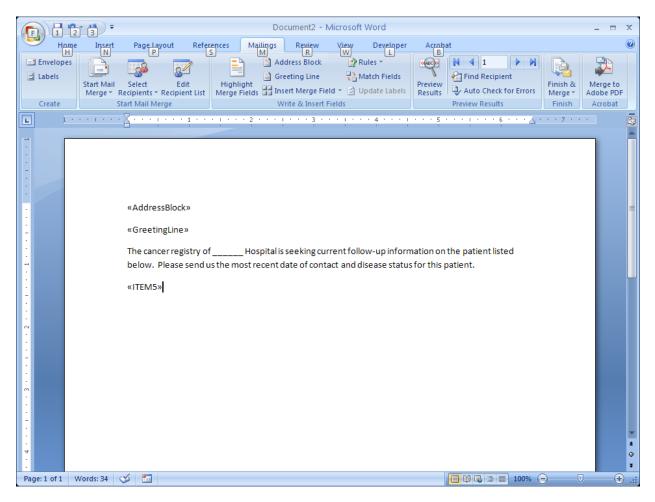
Now the Greeting Line is visible. Hit 'Enter' to move to the next line.

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."

Insert Merge Field	? 🛛
Insert: <u>A</u> ddress Fields <u>F</u> ields:	
ITEM1 ITEM2 ITEM3 ITEM4 ITEM5 ITEM6 ITEM7 ITEM8 ITEM9	
Match Fields	sert Cancel

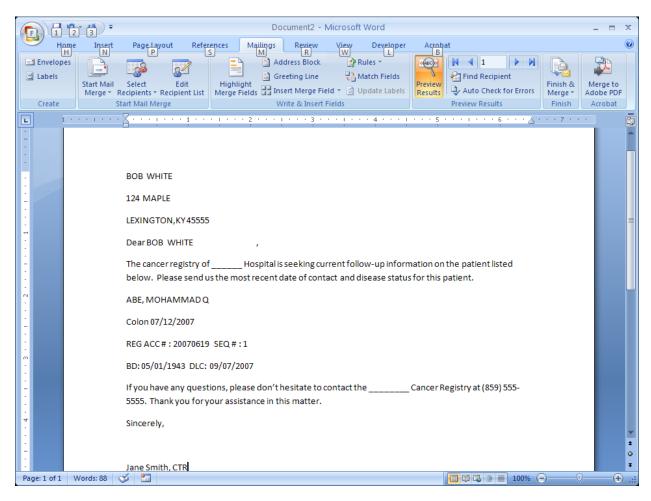
"Item 5" now appears where the patient's name will be listed. Repeat this process to add as many fields as you wish. Item 6 contains type of cancer and diagnosis date, Item 7 the registry accession number, Item 8 the date of birth and date of last contact, and Item 9 the physician's name.



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.

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Envelopes Labels		itt List Merge Fields 🔐 Inst	dress Block 🛛 🛐 F	Rules - Match Fields		Finish & Merge *	Merge to Adobe PDF Acrobat
	· · · · · · · <mark>} · · · !</mark> · · ·	1 • • • ! • • • 2 • • • !	3 1	4 * * * 1 *	5	<u>Å * * * 7 * *</u>	·
	below. Please «ITEM5» «ITEM6» «ITEM7» «ITEM8» If you have any	» istry of Hospital is send us the most recent d y questions, please don't h ou for your assistance in th	late of contact and c	lisease status f			
Page: 1 of 1	Words: 66 🛛 🍏 🛅				📑 🛱 民 들 📄 1009	• 🕞 — — (()

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 line, 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.