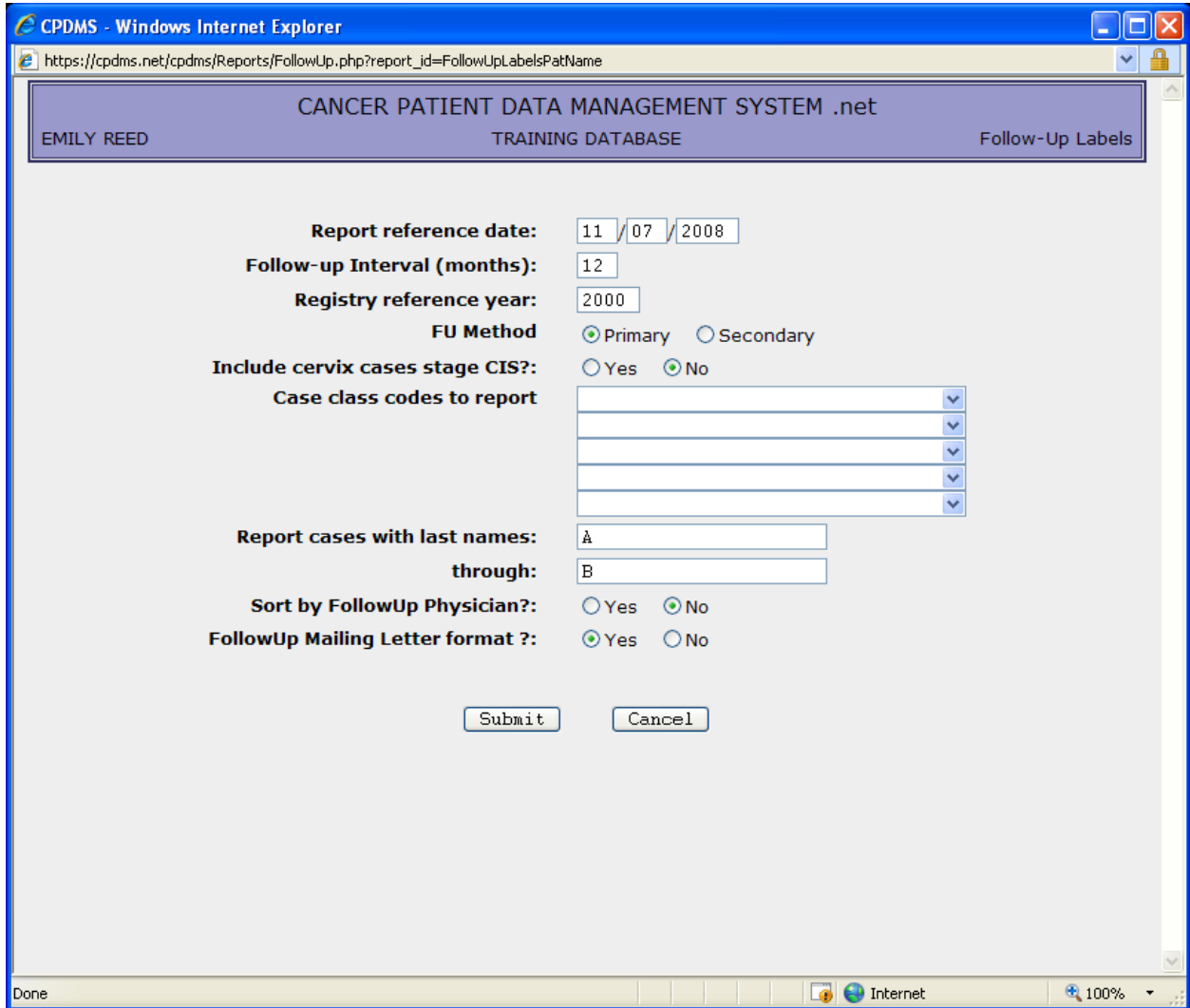


QUICK GUIDE TO PRINTING FOLLOW-UP LETTERS USING MAIL MERGE IN OFFICE 2007

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.



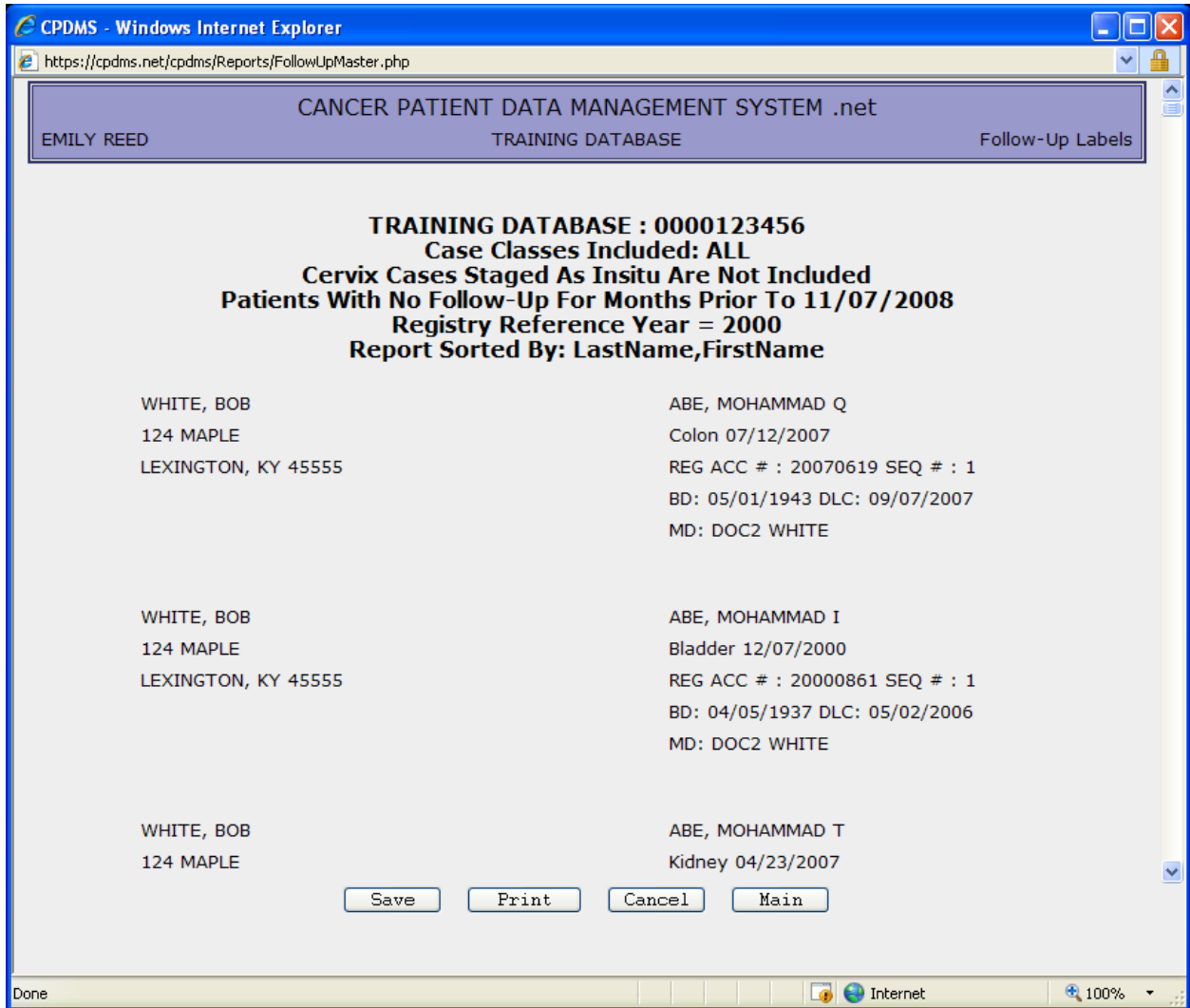
The screenshot shows a web browser window titled "CPDMS - Windows Internet Explorer" with the address bar displaying "https://cpdms.net/cpdms/Reports/FollowUp.php?report_id=FollowUpLabelsPatName". The main content area is titled "CANCER PATIENT DATA MANAGEMENT SYSTEM .net" and includes the user name "EMILY REED" and the database name "TRAINING DATABASE". The page is for generating "Follow-Up Labels".

The configuration options are as follows:

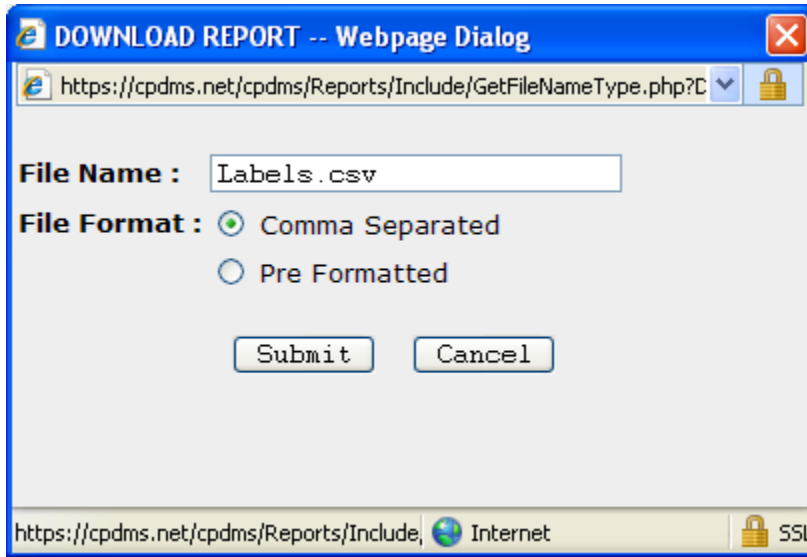
- Report reference date:** 11 / 07 / 2008
- Follow-up Interval (months):** 12
- Registry reference year:** 2000
- FU Method:** Primary Secondary
- Include cervix cases stage CIS?:** Yes No
- Case class codes to report:** Four empty dropdown menus.
- Report cases with last names:** A through: B
- Sort by FollowUp Physician?:** Yes No
- FollowUp Mailing Letter format ?:** Yes No

At the bottom of the form are "Submit" and "Cancel" buttons.

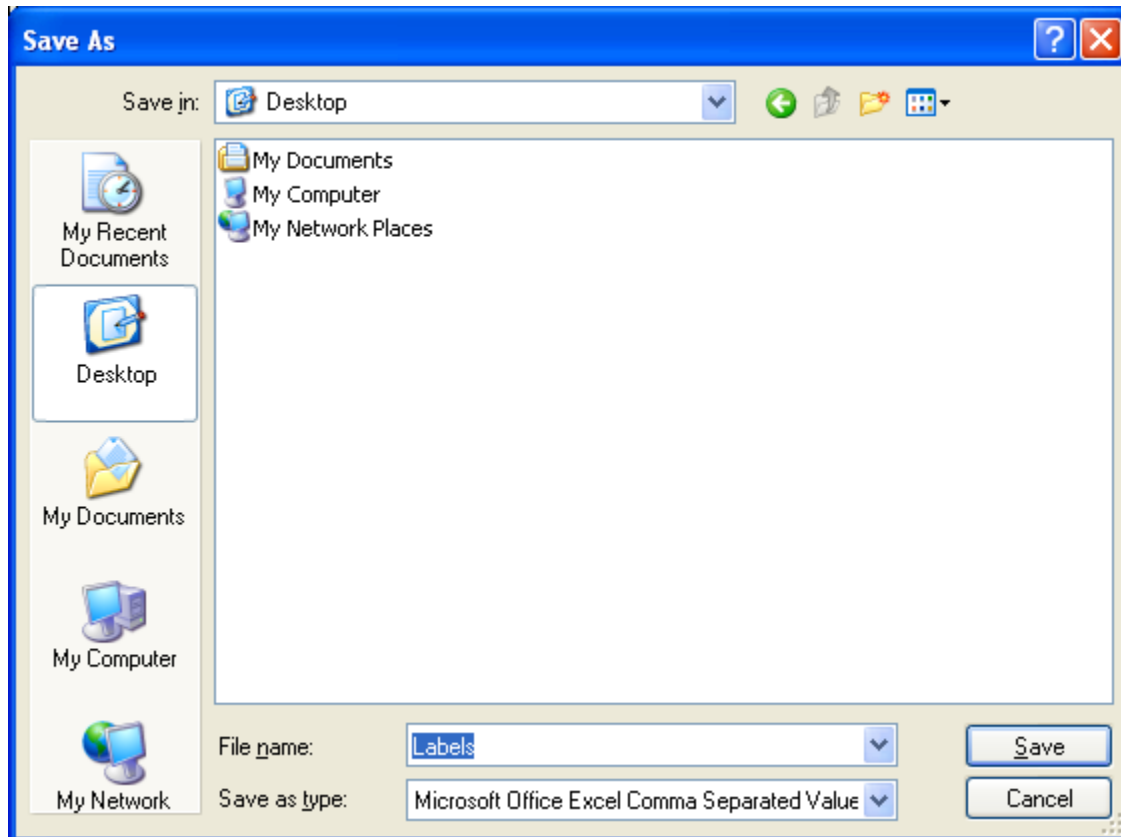
As seen below, the output for follow-up letters, as displayed in CPDMS.net, appears identical to the label output. However, when the report is saved as .csv file, the format will be optimized for letters rather than labels.



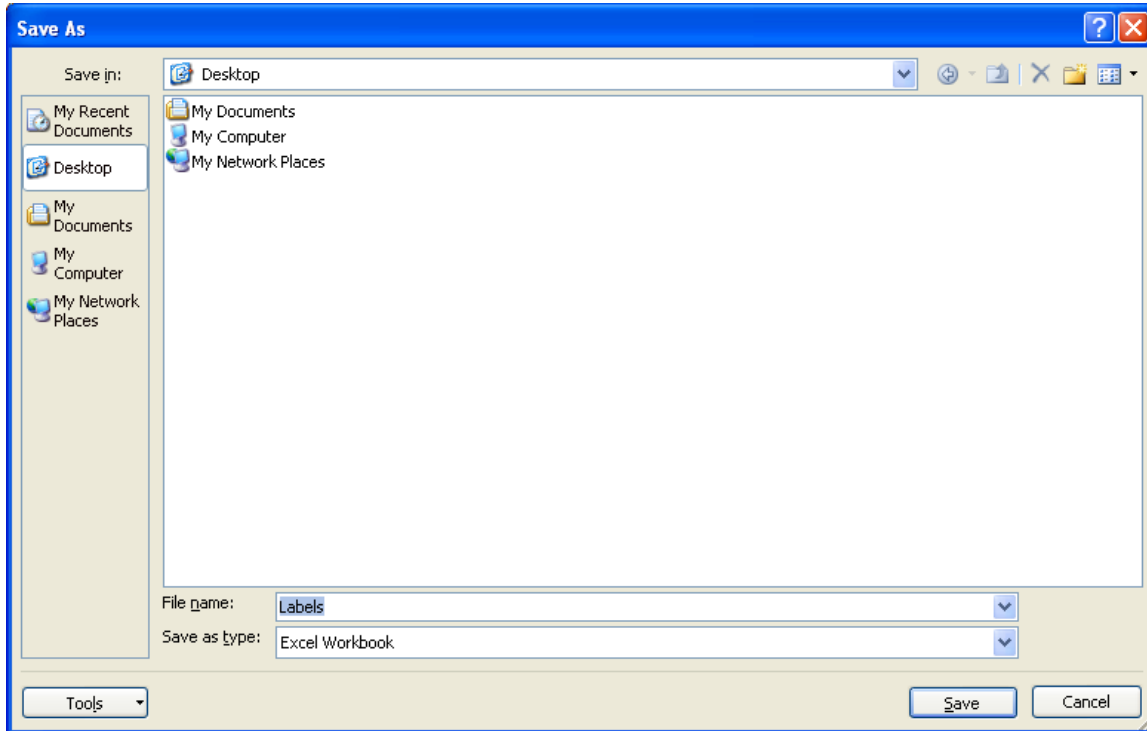
Choose the “Save” button and a dialog box will appear with the default filename “Labels.csv” and “comma separated” as the specified file format. The filename may be changed to whatever you wish, but be sure to preserve the .csv extension.



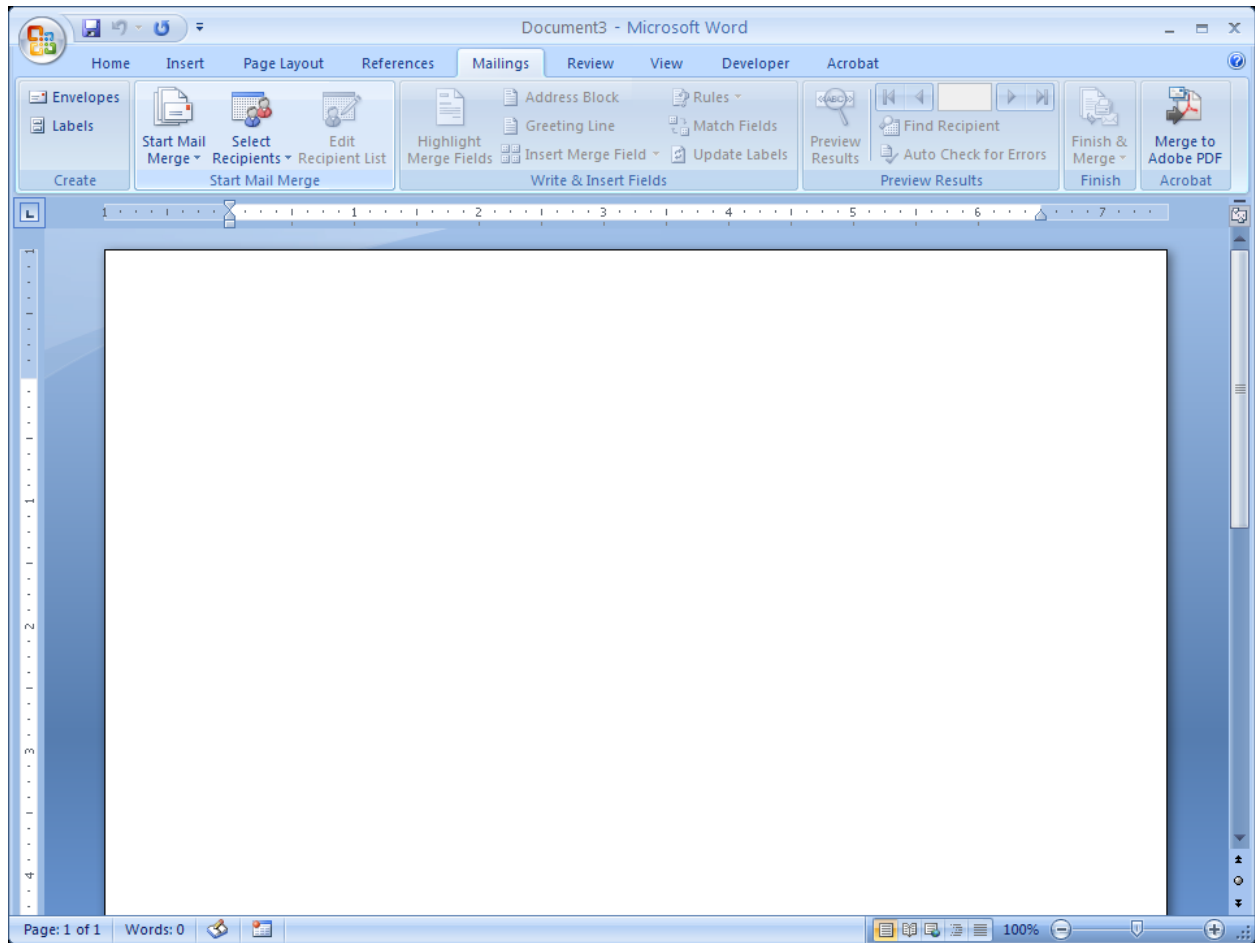
Select “Submit” and then “Save” to save the file to the desired location on your own computer or network drive. In the screen below, for example, the file is saved to the user’s computer desktop.



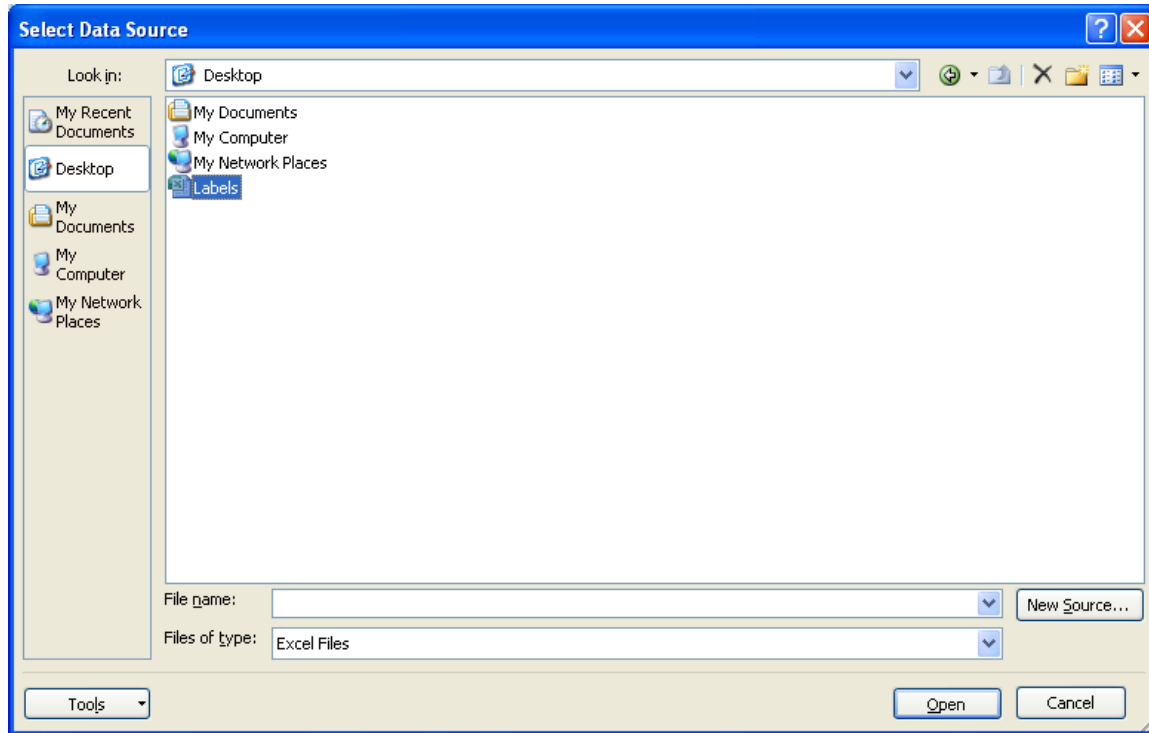
Once the file has been saved to your computer, open it using Excel. In Excel, click the Office Button (in the top left corner) and choose “Save As” and “Excel Workbook.” A dialog box will open. At this point, you can choose where to save the file and assign a different name if you wish. Once you have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



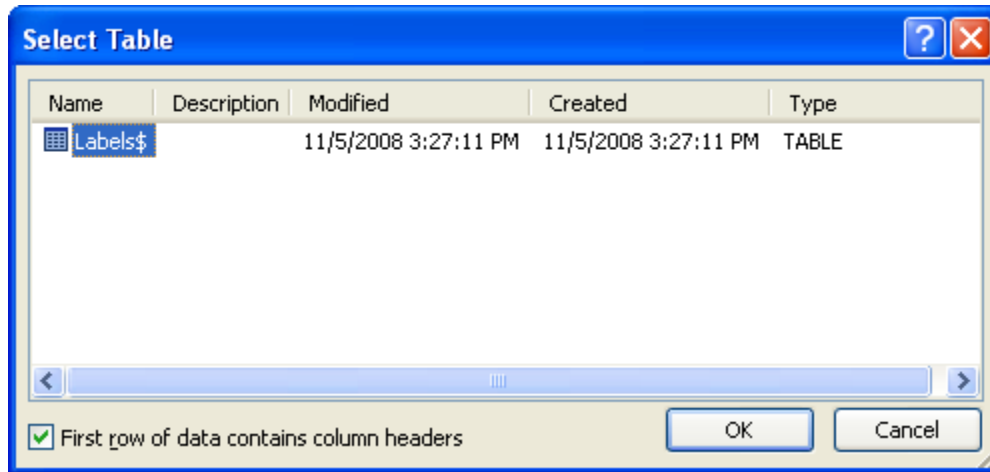
Now open Microsoft Word, click the “Mailings” tab, then the “Start Mail Merge” button and “Letters.”



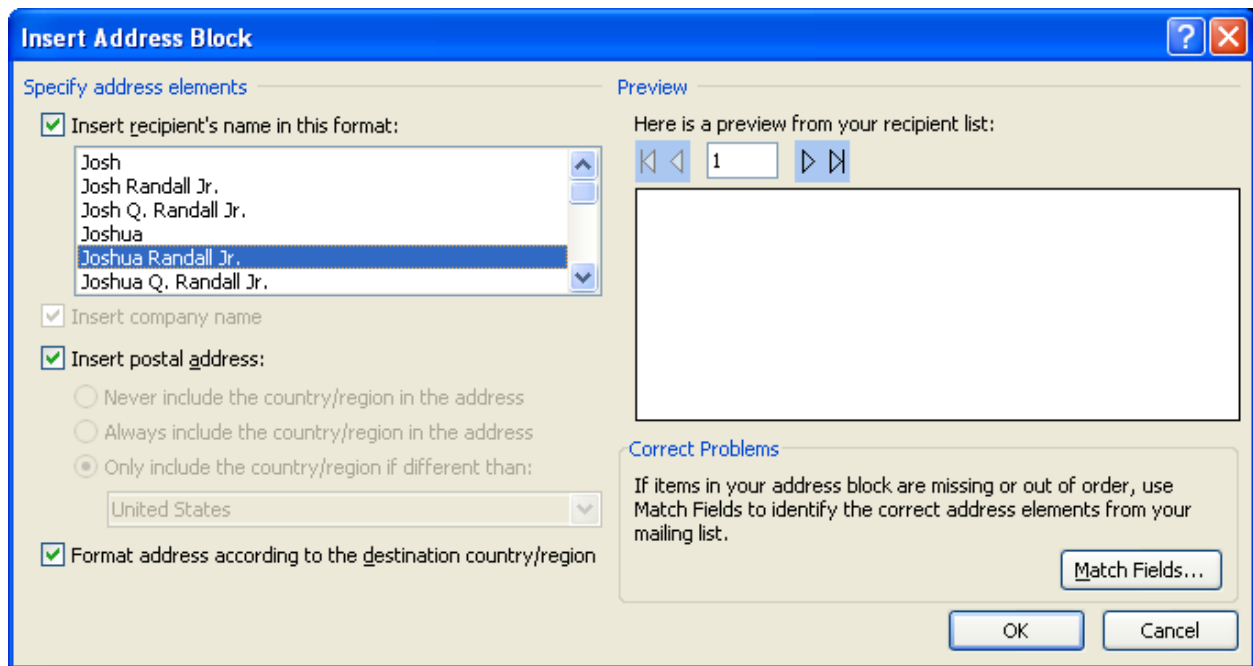
Next, from the “Mailings” menu, choose “Select Recipients” and “Use Existing List.” The “Select Data Source” dialog box is now displayed. Click the arrow to the right of “Files of type” and select “Excel Files” from the drop down menu (you may have to scroll down the list to find it). Next go to the 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.”



Next the “Select Table” dialog box will appear. Click “Ok.”

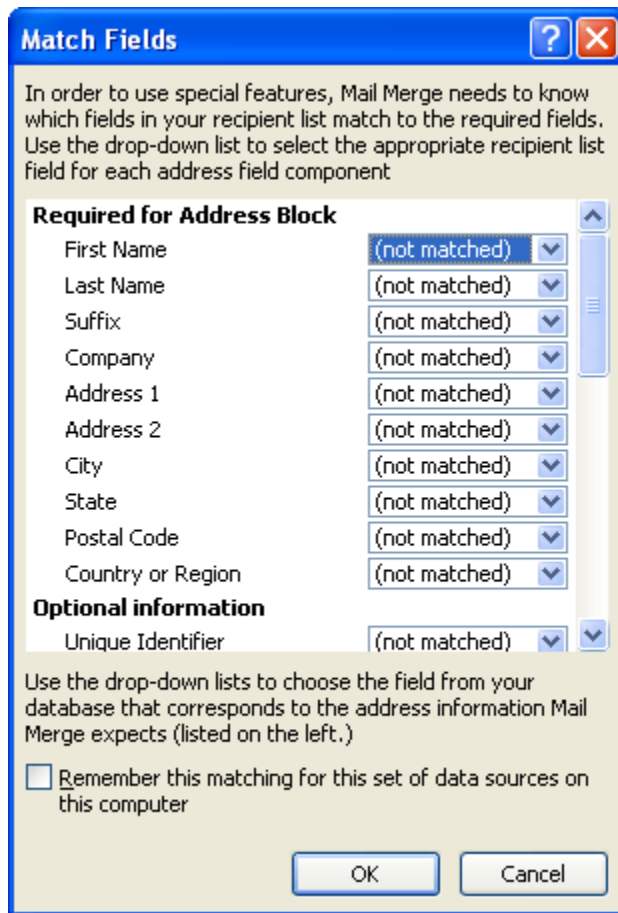


In order to add the names and addresses of the physicians to each letter, click on “Address Block” in the “Write and Insert Fields” section of the Mailings menu. A dialog box opens, as seen below:



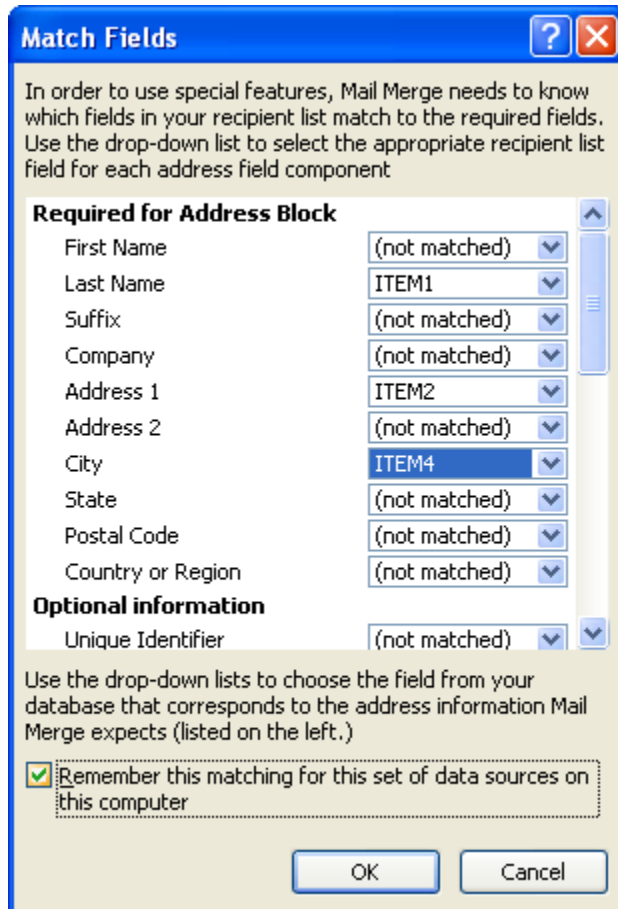
Click on “Match Fields” to fill in the address blocks with the data from the Excel spreadsheet.

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



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.



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

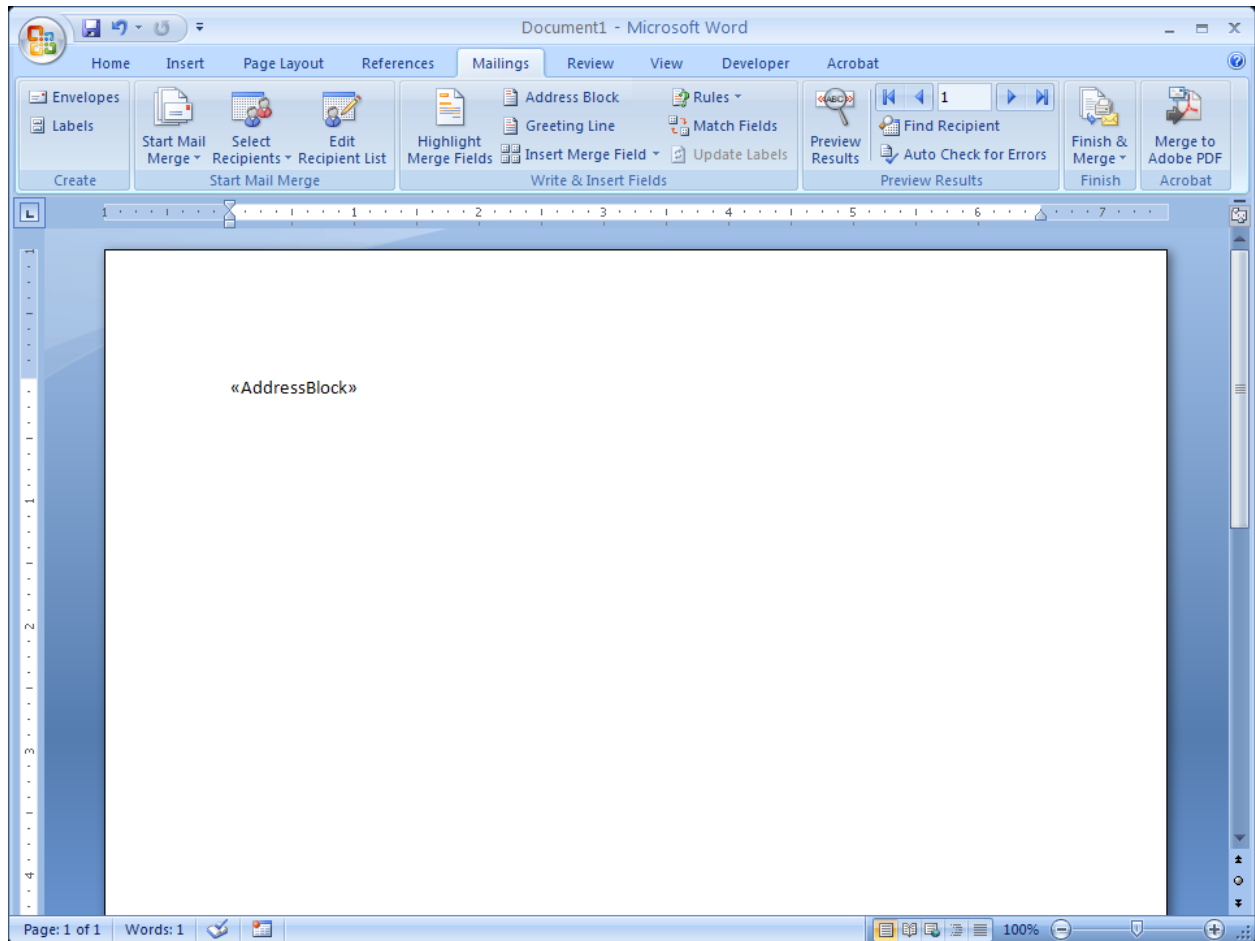
Correct Problems

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...

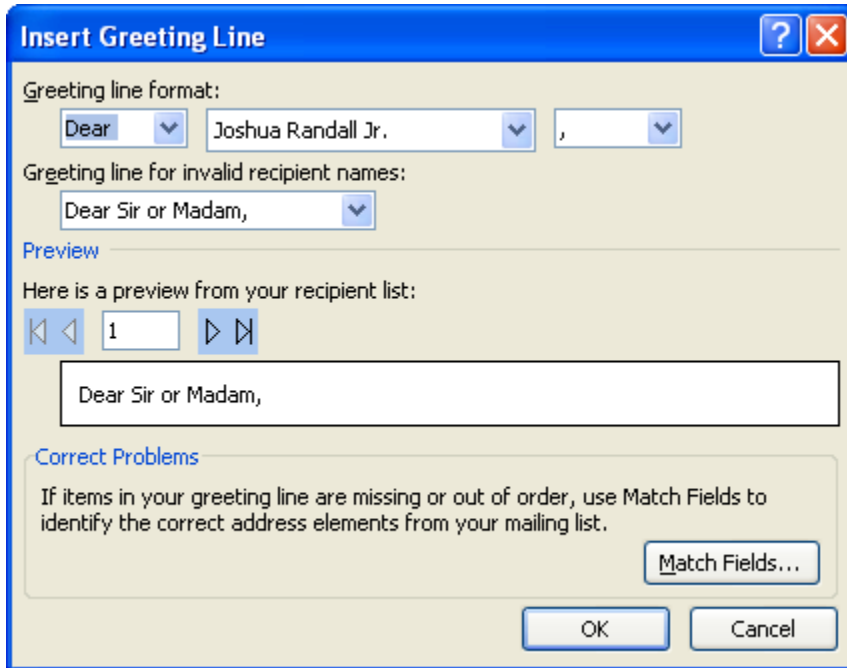
OK Cancel

As seen below, ‘<<AddressBlock>>’ appears 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.

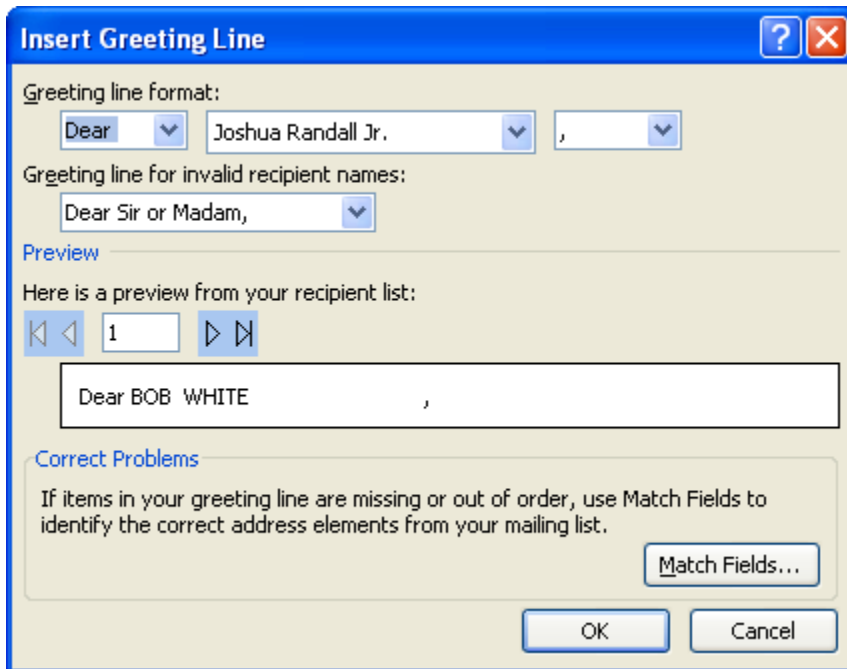


The cursor is immediately to the right of the address block. Hit 'Enter' to move to the next line and click on "Greeting Line" in the "Write and Insert Fields" section of the Mailings Menu.

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.

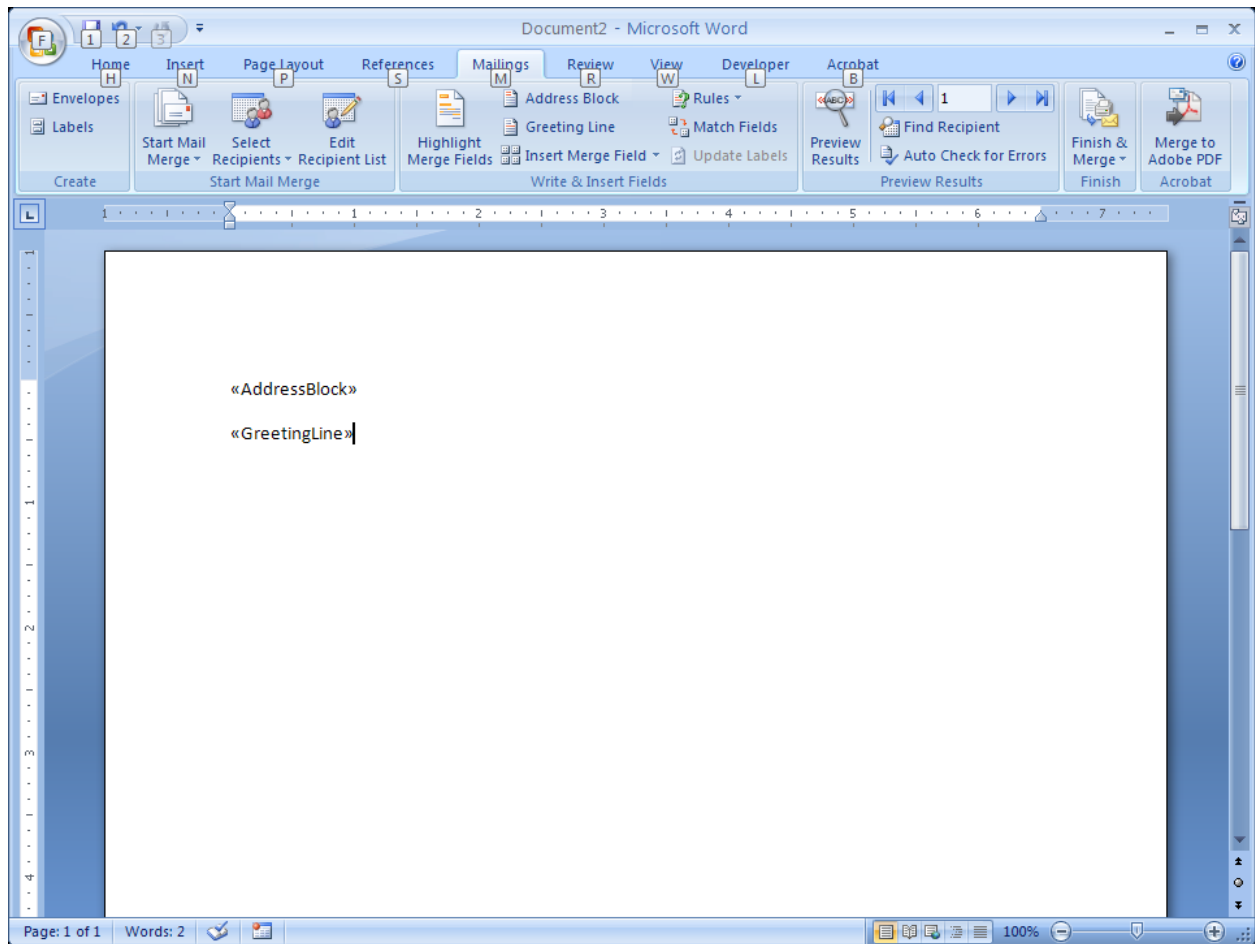


The name of the first letter recipient is previewed, as seen below. Subsequent greetings can be previewed using the forward and back arrows above the preview.



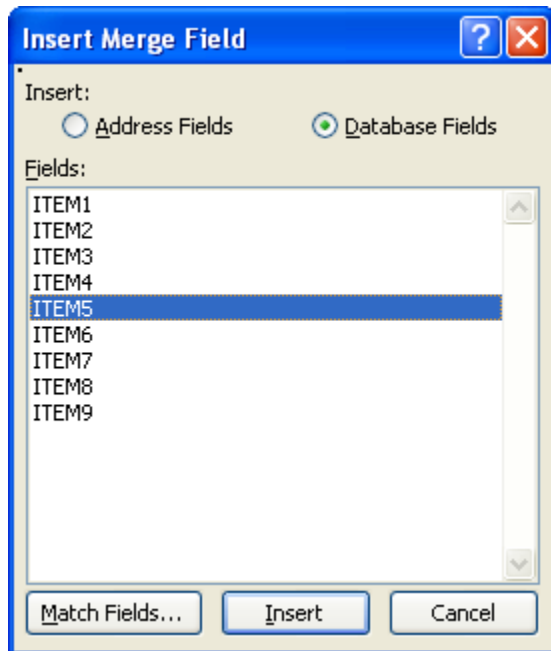
Click “Ok” to insert the greeting.

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

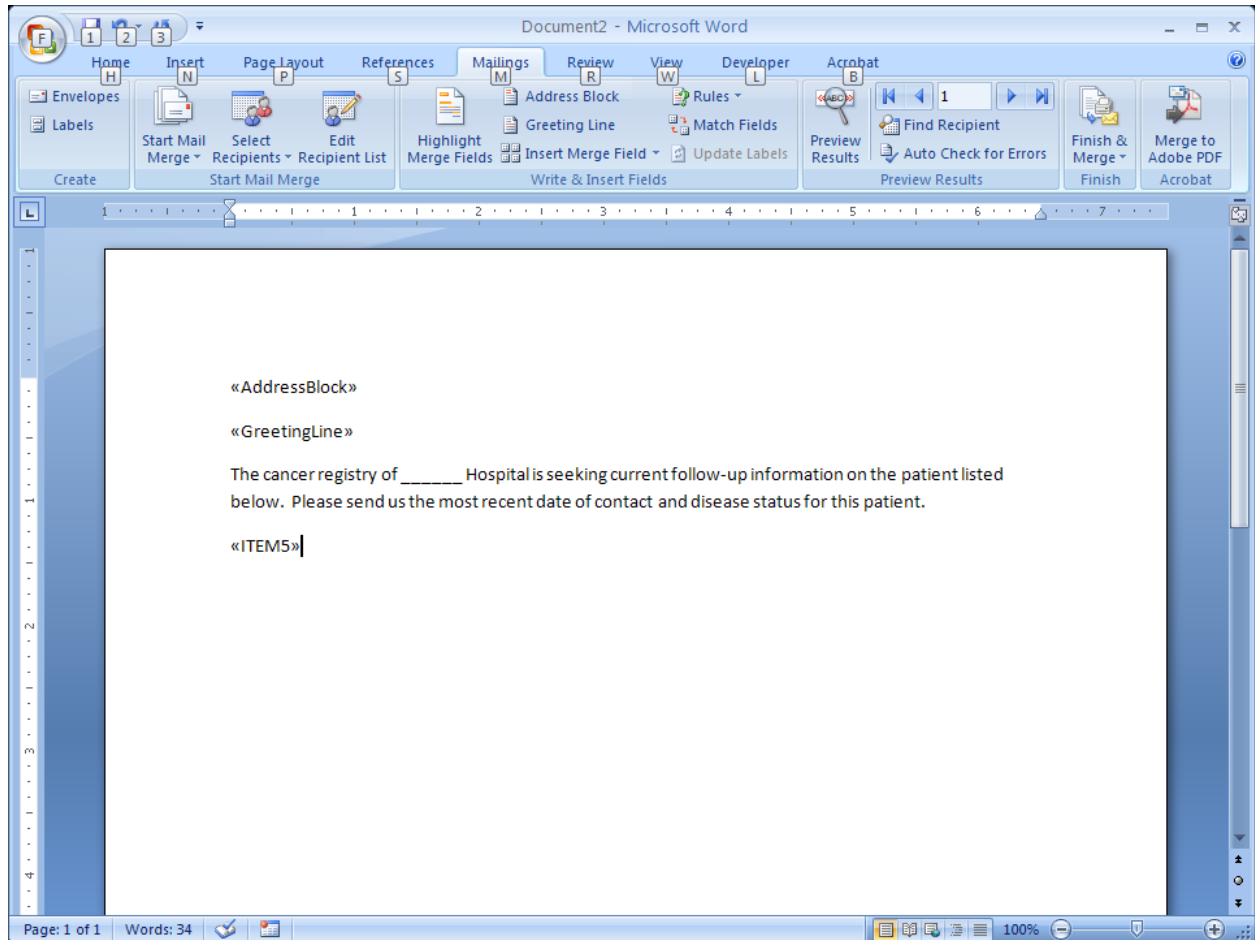


At this point, type the body of your follow-up letter.

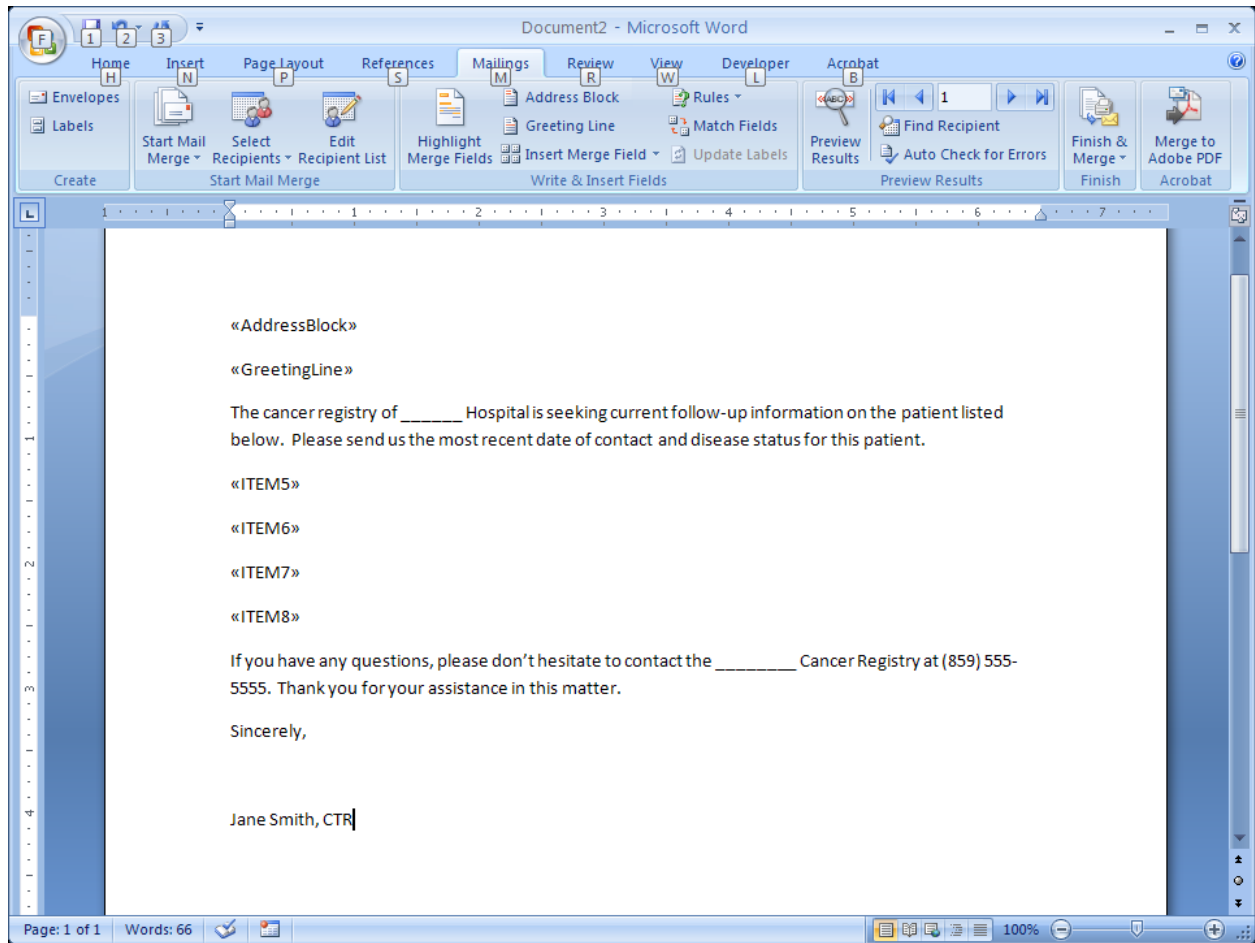
In order to insert the fields for the name and information of the patient for which you are seeking follow-up, place the cursor in the area of the letter where you wish this information to appear, and click on “Insert Merge Field” from the “Write and Insert Fields” menu. The dialog box seen below should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



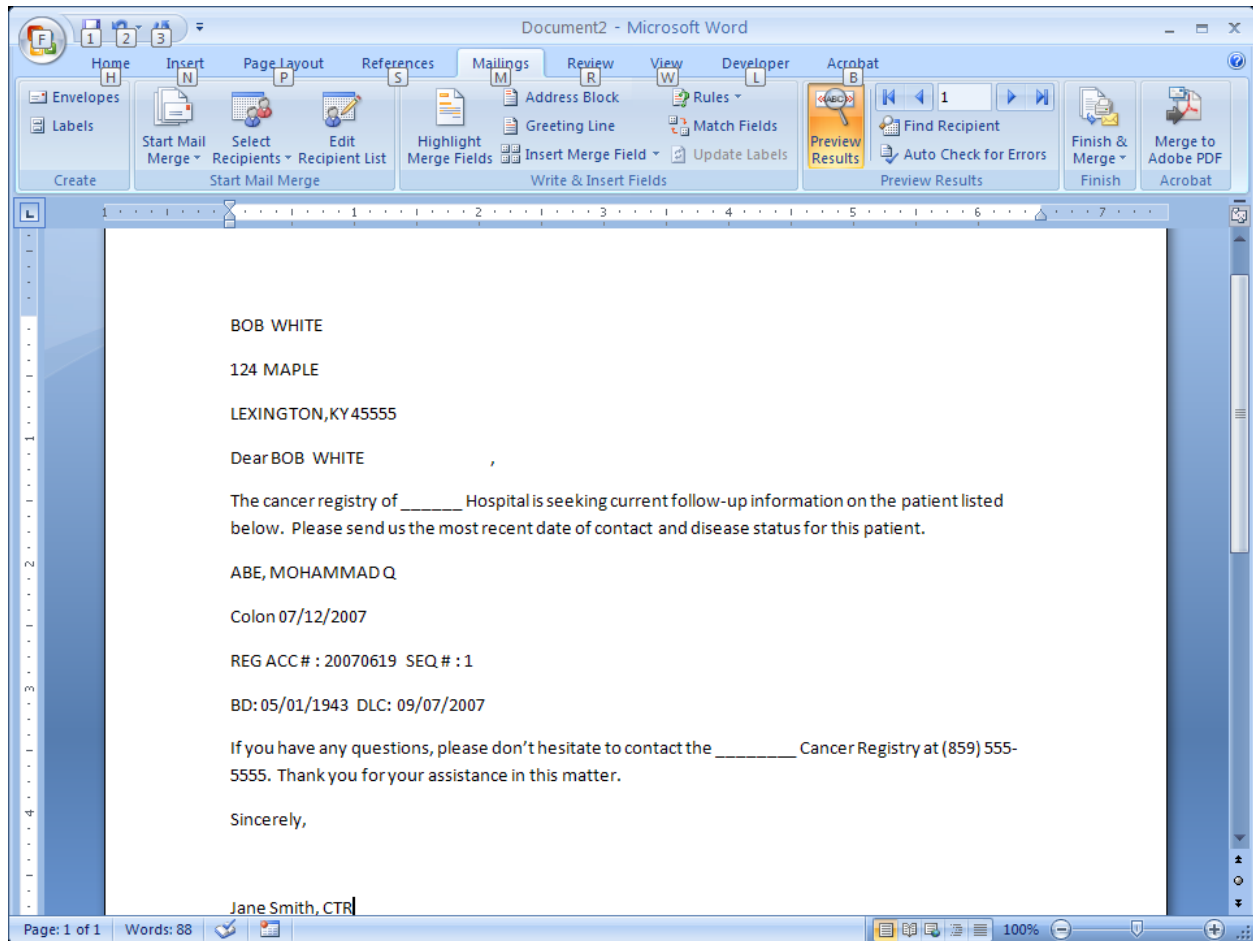
“Item 5” now appears where the patient’s name will be listed. Repeat this process to add as many fields as you wish. Item 6 contains type of cancer and diagnosis date, Item 7 the registry accession number, Item 8 the date of birth and date of last contact, and Item 9 the physician’s name.



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 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.