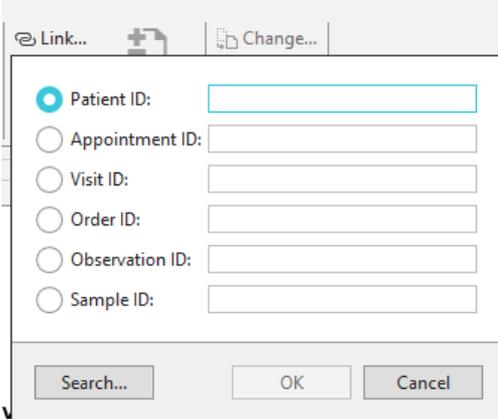
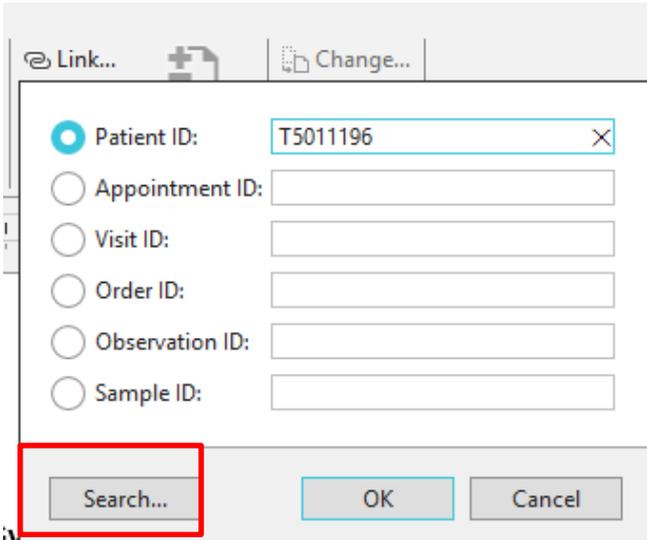
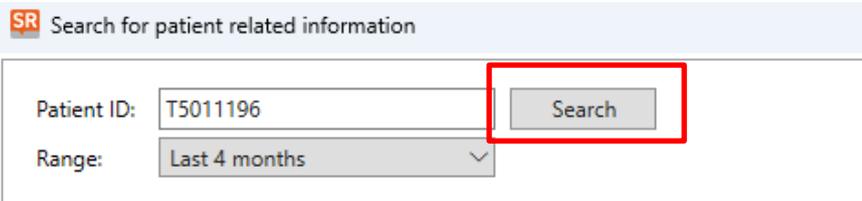
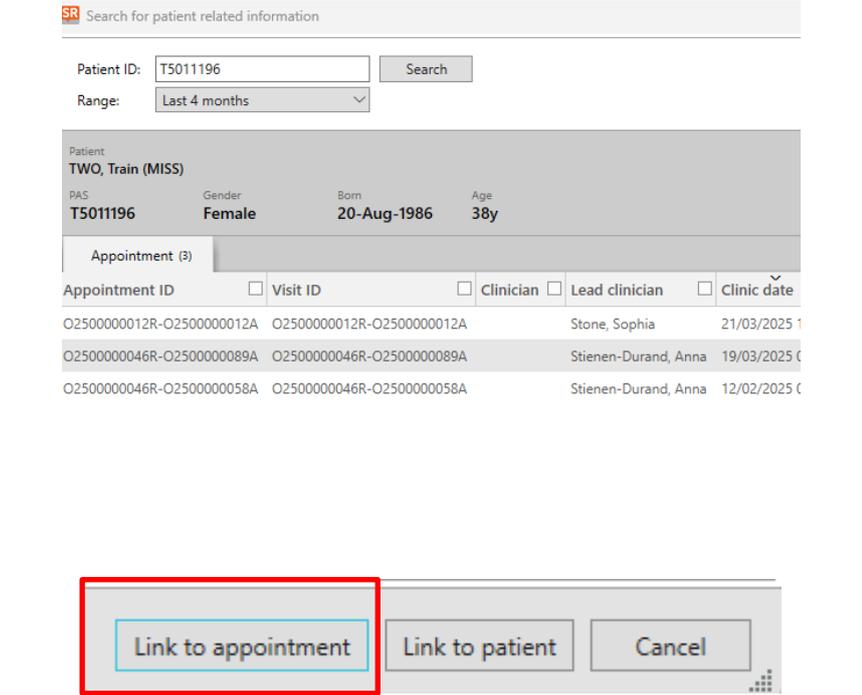
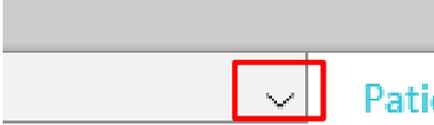
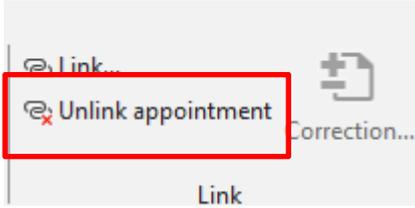


Linking Patients and Appointments	
In letter view, open the Home banner by clicking the down arrow on the right-hand side	
Click 'Link'	
Type in your criteria.  Appointment ID or Patient ID are the best search fields to use here	
Type in your details and click 'Search'	

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<p>In the window that opens, change the date range if needed and click <b>'Search'</b> again.</p>																																														
<p>If you're linking to an Appointment – Select the appointment in the list and click <b>'Link to appointment'</b></p>	 <table border="1" data-bbox="587 712 1321 981"> <thead> <tr> <th colspan="5">Patient</th> </tr> <tr> <th colspan="5">TWO, Train (MISS)</th> </tr> <tr> <th>PAS</th> <th>Gender</th> <th>Born</th> <th colspan="2">Age</th> </tr> </thead> <tbody> <tr> <td>T5011196</td> <td>Female</td> <td>20-Aug-1986</td> <td colspan="2">38y</td> </tr> </tbody> </table> <table border="1" data-bbox="587 824 1321 981"> <thead> <tr> <th colspan="5">Appointment (3)</th> </tr> <tr> <th>Appointment ID</th> <th>Visit ID</th> <th>Clinician</th> <th>Lead clinician</th> <th>Clinic date</th> </tr> </thead> <tbody> <tr> <td>O2500000012R-O2500000012A</td> <td>O2500000012R-O2500000012A</td> <td></td> <td>Stone, Sophia</td> <td>21/03/2025 1</td> </tr> <tr> <td>O2500000046R-O2500000089A</td> <td>O2500000046R-O2500000089A</td> <td></td> <td>Stienen-Durand, Anna</td> <td>19/03/2025 C</td> </tr> <tr> <td>O2500000046R-O2500000058A</td> <td>O2500000046R-O2500000058A</td> <td></td> <td>Stienen-Durand, Anna</td> <td>12/02/2025 C</td> </tr> </tbody> </table>	Patient					TWO, Train (MISS)					PAS	Gender	Born	Age		T5011196	Female	20-Aug-1986	38y		Appointment (3)					Appointment ID	Visit ID	Clinician	Lead clinician	Clinic date	O2500000012R-O2500000012A	O2500000012R-O2500000012A		Stone, Sophia	21/03/2025 1	O2500000046R-O2500000089A	O2500000046R-O2500000089A		Stienen-Durand, Anna	19/03/2025 C	O2500000046R-O2500000058A	O2500000046R-O2500000058A		Stienen-Durand, Anna	12/02/2025 C
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<p>If you're only linking this to the patient e.g. an Ad Hoc letter rather than a clinic related letter, just click <b>'Link to Patient'</b></p>																																														
<p>Once linked, the mail merge fields and addressee details will fill in for this patient.</p>																																														

Unlinking Patients and Appointments	
If the wrong patient/appointment has been linked to the letter then you can unlink the details.	
In letter view, open the Home banner by clicking the down arrow on the right-hand side	
Click 'Unlink appointment'	
<p>This will remove all patient details from the letter/mail merge fields.</p> <p>You would then need to Link this to the correct Patient/Appointment.</p>	