

## PREPARING A WORD PROCESSING IMPORT FILE IN VISIONWARE

VisionWare users have the ability to create an import file which can be used with other software. This import file contains 35 fields of information about each patient. Any combination of these fields can be extracted from the import file to address form letters, prepare recall cards, or create customized mailings/reports.

There are two features within VisionWare that will create a word processing import file – Patient Recall and Word Processing Interface. Both features create a file named WPIMPORT.TXT, which is a text file.

NOTE: Each time the WPIMPORT.TXT file is created (either through Patient Recall or Word Processing Interface) any previously existing WPIMPORT.TXT file is overwritten with the current file.

### PATIENT RECALL:

1. Click "Patients" on the VisionWare toolbar.
2. Point at "Recall and then click "Full Recall Scan".
3. Specify the following:
  - Doctor for whom you are performing the scan – input the Dr.'s number or, leave the default "ALL" for all doctors.
  - Month and Year to be scanned. This represents the month/year the patients are due for a visit (example 05, 2000 for patients due in May, 2000).
  - "Scan entered month only" – leave check mark if you want patients due only for the specified month. This excludes patients who were due in previous months but did not reply to their recall.
  - "Scan previous years" – leave check mark if you want to include patients who were recalled in previous years but did not reply. Remove check mark if you want only patients due in 2000, excluding patients who were due in previous years and did not reply.
  - Starting Patient – only specify a patient name here if you are not starting at the beginning of your patient list.
  - Display Options:
    - **Screen Display** – lists patients to be recalled to screen only.
    - **Printer** – provides a printed report complete with phone numbers
    - **Word Processing File** – creates the WPIMPORT.TXT file for use with your word processing software, create mailing labels with VisionWare's mailing label option, or sent on a disk or by e-mail to a third party (such as Paulson Communications) to produce recall notices.

**NOTE: For instructional purposes, the steps below assume Word Processing File has been selected. The steps below do not apply if Screen Display or Printer is selected.**

  - Mixed Case – check mark if you wish to remove excess spaces from the file and change the data from UPPERCASE to Mixed Case (i.e. "JOHN SMITH" converts to "John Smith")
4. Click on the "Begin Scan" icon on the horizontal menu bar near the top of the window. A second screen appears
  - Advance Recall Flag and Date – tracks the number of recalls sent to a patient without reply. **NOTE: Once the flags are advanced the recall list cannot be recreated for the specified month/year.** Advancing Flags is not recommended for novice users.
  - Update Recall Factor – changes the recall factor for all patients on the recall list to the recall factor specified. **NOTE: Once recall factors are changed they cannot be changed back.** This feature is not recommended for novice users.

5. Click on the “Create Word Processor file” icon located on the horizontal menu bar near the top of the window. The Recall Scan begins. When the scan is complete, the user has the option to print a listing of the patients contained in the WPIMPORT.TXT file.
6. At this point, the WPIMPORT.TXT file exists in the VisionWare directory. It can now be copied to a disk or e-mailed directly to a third party. This file is used to create mailing labels with VisionWare’s mailing labels feature. It will reside in the VisionWare directory until the next recall (or Word Processing Interface file) is created.

### **WORD PROCESSING INTERFACE:**

The Word Processing Interface feature allows the VisionWare user to create a listing of patients based on some common piece of data – such as the City they live in, the Optometrist they see, their Last Exam Date, etc. There are 26 different data fields which can be searched for common data. Once the listing is created, it is stored in the WPIMPORT.TXT file. This file can then be used with your Word Processing software or with VisionWare’s mailing labels feature, or sent to a third party for preparation of recall notices.

1. Click “Patients” on the VisionWare toolbar.
2. Click on “Word Processing Interface” from the drop down menu.
3. Specify the particular data you wish to search on. Any combination of the 26 data fields can be used.
4. Note the two additional options in the bottom right corner of the window:
  - Report in Detail Format – prints the resulting report complete with phone numbers
  - Convert WPI file to lower case – changes all UPPERCASE data to Mixed Case (i.e. “JOHN SMITH” changes to “John Smith”)
5. Click on the “Proceed with Criteria” button at the bottom of the window. The WPIMPORT.TXT file is created and resides in the VisionWare directory. The user has an option to print a report showing the names of the patients contained in the file.

Below is a list of the 35 data fields contained in the WPIMPORT.TXT file.

- |                                    |                                       |
|------------------------------------|---------------------------------------|
| 1. Salutation                      | 19. Last Contact Lens Dispensing Date |
| 2. First Name                      | 20. Physician Last Name               |
| 3. Initial                         | 21. Physician First Name              |
| 4. Last Name                       | 22. Physician Phone #                 |
| 5. Street                          | 23. Referral Last Name                |
| 6. City, Province                  | 24. Referral First Name               |
| 7. Postal Code                     | 25. Referral Phone #                  |
| 8. Home Phone                      | 26. Insurance Company                 |
| 9. Employer                        | 27. Insurance Subscriber              |
| 10. Business Phone                 | 28. Insurance Policy Number           |
| 11. Business Extension             | 29. Insurance Claim Frequency         |
| 12. Occupation                     | 30. Insurance Claim Limit             |
| 13. Recall Factor                  | 31. Cell Phone                        |
| 14. Doctor #                       | 32. Email Address                     |
| 15. Birth date                     | 33. Known As                          |
| 16. Contact Lens Service Agreement | 34. Sex                               |
| 17. Last Exam Date                 | 35. File Number                       |
| 18. Last Eye Glass Dispensing Date |                                       |

**NOTE: For ease of use with MS Word software, you will need to enable the “Header on WPIMPORT File” feature in VisionWare. Please call the VisionWare hotline to enable this feature for its use.**