

Working Instructions

DOCMAIL

For practice administrators to send invite packs to identified patients to screening/baseline clinic for OPTiMISE



Practice Administrators

Once the GP has returned the revised list of identified patients, you will need to organise invitation packs to be sent out using DOCMAIL.

The invitation packs will contain the following:

- 1). Invitation letter – with practice header
- 2). Patient Information Sheet (PIS)
- 3). Audio recording PIS
- 4). Carer Information Sheet
- 5). Freepost envelope addressed to PC-CTU for patients to return their responses

DOCMAIL INSTRUCTIONS:

Once the GP has returned the reviewed list, you will need to copy and paste columns A-M into the OPTiMISE EMIS output for DOCMAIL spreadsheet which will be saved on your computer. Save the file to your desktop. This will be the spreadsheet you upload to add the addresses in section 6.

1. Access Docmail online: www.cfhdmail.com
2. **To sign in:**
 - Click on ‘**Sign Up/Log in**’ on bar at the top of the page.
 - You will be taken to the **Sign in** page, enter your **Login User ID** and **Password**.

Username:	optimise@phc.ox.ac.uk
Password:	xxxx

You may change the password at any time by going to Admin (on the tool bar). Select User then My Login Details and Edit password

- From this screen go to the top black tool bar and click on ‘**create mailing**’

3. To add your Surgery Headed Notepaper as a PDF

From the main page

- Click on ‘**Enter library**’
- Choose Document library and select backgrounds

6. To add addresses:

- a. Click on **'upload'**.
- b. You will be taken to a page to **upload your excel address spread sheet.**

Address File **'select'**

Browse for the OPTiMISE EMIS output for DOCMAIL file on your PC. (You will be shown a window, you then search for your address file, select your file then click on **'open'** Your file will then show in the **'address file'** on the page)

'File contains column headers' check it is ticked
 File format automatic from file type
 Mapping: automatic

Click **'Next'**. You will be taken to the assign field's page.

Assign fields

[SET TO DEFAULT MAPPING](#)

Column Header	Sample Data	Map To
Title	Mr	Title
Firstname	Joe	First Name
Surname	Bloggs	Surname
Address1	CFH Docmail Ltd	Address Line 1
Address2	St Peters Park	Address Line 2
Address3	Wells Road	Address Line 3
Address4	Radstock	Address Line 4
Address5	Bath	Address Line 5
Address6	BA3 3UP	Address Line 6
GP name	Dr Docmail	- Add Custom Field -
practice name	Docmail Surgery	- Add Custom Field -
ID number	123456	- Add Custom Field -

You will need to make sure all data is mapped correctly.

➤ Click on **'Next'**

7. To set address name format:

- a. You will see a number of envelopes displayed showing the different ways in which the name can be displayed on the letter.
- b. Click onto the envelope **'Title Firstname Surname'**

➤ Click on **'Next'**

The address will then appear with one of the below:

Red Cross you will need to validate the address by clicking the validate button in the bottom right hand corner

Green ticks show the address is fine.

Orange question marks mean your address may be **incomplete or incorrect** and will incur a 5p surcharge.

Amending incomplete or incorrect addresses - You have an option to edit these so please do. If any address has an orange question mark next to it, please select **'Edit'**. You will be taken to the edit addresses screen, where you should edit the address manually or tick the box stating **'Use Corrected?'** if a corrected address is available.

- i. Click on **'Next'**.

8. **Print and post:**

Print options: **colour duplex (double sided)**

- a. Click on **'Next'**.

9. **To approve the mailing:**

Click on **the address within the envelope** to view the document. (you can either download this or view online)**Please check this CAREFULLY.**

That the letter includes the patient title, first name, surname and full address.

Please do NOT send the document if you have concerns or are unsure

ANY PROBLEMS AT THIS STAGE PLEASE PHONE DOCMAIL HELPDESK AND THEY WILL BE HAPPY TO ASSIST.....for example, the recipient's name has not merged correctly on the document.

Once you are satisfied that everything is OK then:



- a. Click the anywhere on the proof and this will shut the proof down for you.
- b. Click 'approve'.
- c. Enter your **surgery name** in the PO (purchase order) reference box.
- d. Click on 'Pay on invoice'.

The order has now been submitted for production.

Your mail out is now complete.

Thank You

DOCMAIL Contact Details

Email support: docmailsupport@cfh.com

Telephone support: 01761 409701/702
9.00am-5.30pm Monday-Friday

Address: CFH Total Document Management Ltd
St Peter's Park
Wells Road
Radstock
BA3 3UP
Tel 01761 416311

	Name	Title	Signature	Date
Written by:				
Approved by:				

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Effective Date:	
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