

Steps to Customize a Collection Letter:

1. Make a copy of Centricity's collection letter
2. Export the copied collection letter out of Centricity and put it into Microsoft Word
3. Figure out what you are going to say in your letter using the Mail Merge Fields available in Centricity.
4. Open and edit your letter in Microsoft Word (save and close when finished)
5. Import the Word letter into Centricity
6. Rename your Word letter
7. Assign Security
8. Attach the Word letter to a Collection Status *if applicable

Copy Centricity's Collection Letter

1. From the Reports Component in Centricity, go to the Collections folder and then to the Letters subfolder.
2. Left click and drag the collections letter and let go when you are over the Letters subfolder. The Letters subfolder will be blue as seen in the image below.
3. When you let go, Centricity make a copy of the letter and select "Copy Here".
 - a. The letter now appears in Red with a name of "Copy of Collection Letter."

Export a Collection Letter Out of Centricity

1. Highlight your newly copied Collection letter.
2. Click on the "Switch to Design Mode Icon" on the Reports Icon Toolbar.
3. Click on the Export Button to take this letter out of Centricity.
4. Give your letter a name ending the name with the file extension of .doc
5. Change the file type to **All Files** using the drop down and save it to your desktop (or any other preferred location).
 - a. Click Save when finished.
6. Now minimize Centricity and go find your letter on your desktop (or wherever you saved it). Double click on it to open it.

Now that the letter is copied from Centricity and exported into Word, it is time to start editing your letter.

Mail Merge Fields that are Centricity-Friendly

Familiarize yourself with the **Mail Merge Fields** Centricity is compatible with. (This list comes from the F1 help menu from Centricity). The Mail Merge Fields listed here are the only fields that we can pull from Centricity's fields to populate our letter.

Mail merge fields for collection letters: (from F1 Centricity Help Menu)

Patient_Id	Guarantor_City	Insurance_Balance_31to60
PatientProfileId	GState	Insurance_Balance_61to90
Patient_Prefix	GZip	Insurance_Balance_91to120
Patient_First_Name		Insurance_Balance_121
Patient_Middle_Name	DaysInCollections	
Patient_Last_Name	DateInCollections	Facility_Name
Patient_Suffix	NextContactDate	Facility_Address_1
Patient_Address_1	Visit_Total_Balance	Facility_Address_2
Patient_Address_2	Visit_Insurance_Balance	Facility_City
Patient_City	Visit_Patient_Balance	Facility_State
Patient_State	Current_Insurance_Carrier	Facility_Zip
Patient_Zip	Patient_Balance_Current	Facility_Phone_1
PatientVisitId	Patient_Balance_0to30	Facility_Phone_2
	Patient_Balance_31to60	Facility_PayTo_Address_1
Guarantor_Prefix	Patient_Balance_61to90	Facility_PayTo_Address_2
Guarantor_First_Name	Patient_Balance_91to120	Facility_PayTo_City
Guarantor_Middle_Name	Patient_Balance_121	Facility_PayTo_State
Guarantor_Last_Name	Account_Total_Balance	Facility_PayTo_Zip
Guarantor_Suffix		Facility_PayTo_Phone_1
GAddress1	Insurance_Balance_Current	Facility_PayTo_Phone_2
GAddress2	Insurance_Balance_0to30	

Write Your Letter

Now it's time to write the body of your letter; keeping in mind the available fields that pull from Centricity. Once you have the body of the letter written, then we can add the "Centricity-Specific" mail merge fields. Save all formatting and logos for the end.

Centricity comes with a pre-built collection letter template. If you want to delete what comes with Centricity's letter and start from scratch, that is ok. Simply highlight (or Cntrl + A) to select all and hit the delete button on your keyboard.

For this example, we will start from scratch.

Type the body of your letter using all the regular formatting that Microsoft Word has available as usual.

Tip: you may want to type your letter and just put place marks in the areas where you are going to enter the mail merge fields. That way, the mail merge fields can then be added all at once.

Enter mail merge fields:

Click on the area in your letter in which you would like to enter a mail merge field. We will start with the greeting line. First, we will put in the patient's first name.

Make sure your cursor is after the word "Dear" in the greeting line of your letter. Hit the spacebar once to put a space between the word "Dear" and the patient's name.

WARNING! Be careful of formatting such as punctuation and spacing when using Mail Merge and when building your letter. Each Mail Merge field is entered individually and errors can easily be made.

For example, when entering "Patient_City" you must type a comma after the city and then hit the space bar before you enter "Patient_State" field.

Spacing and punctuation is very particular and is hard to see until after a collection letter is printed out of Centricity. These can be edited, but try to pay close attention when building the letters instead.

1. Go to the Insert Menu select Field.
2. Change the Category using the dropdown to Mail Merge
3. Highlight Merge Field in the Field name area.

The Mail Merge fields available from F1 in Centricity can now be entered in the Field Name area located in the middle panel of the Field Window.

4. Type the field in EXACTLY as it is shown. (It will not work otherwise)
5. Select OK when finished. You have just entered in a Centricity-Friendly mail merge field into your collection letter.
6. Go to Insert then Field to continue entering Centricity mail merge fields into your collection letter. Remember spacing is very particular here.
 - a. Once all your mail merge fields are entered, you may add additional formatting or graphics to enhance your letter. The sky is the limit!
 - b. You may want to enter your company logo
 - c. A remittance stub on the bottom

Note: If you are going to put a remittance stub on the bottom of your letter, you will need to test & line up the address lines so they work if you are going to use window envelopes.

Also, think about flagging this payment somehow so you will know that when the payment is sent in, you will know it is a collection payment.

7. Save and Close the letter when you are all finished.

Import the Collection Letter Back into Centricity

Once your letter is complete, it is time to import the letter back into Centricity.

1. Go to the reports component in Centricity.
 2. Find the collection letter you copied highlight it
 3. Make sure you are in design mode
 4. Click the Import Button
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1. You may need select ***All File Types** from the drop down if you do not see your letter on your desktop.
 - a. Select your letter ---make sure you select the .doc letter.
 - b. Click Open

Your letter path and name will now appear in the Runtime panel.

2. Click the Switch to "Report Mode Icon" to get back to your normal reports view.
3. Once you switch back to normal reports view, Centricity will ask you if you want to save the changes to this letter. Select Yes.
4. Centricity will also ask you if you want to update the queries (which are the mail merge fields you added). Select Yes.

Note: Since the customized letter is now stored in Centricity, there is no need to save it locally on your workstation. You can make edits locally without exporting your letter first. Or, any user can export the letter, edit it, then import it back into Centricity.

Rename Your Collection Letter

It is a good idea to rename your collection letter so you can identify it. Simply right click over your collection letter and select rename.

Assign Security to Your Collection Letter

When you made a copy of the collections letter, you are the only user who had permissions.

1. To assign security on this letter, simply right click over your letter and select Security.
2. Centricity will ask if you want to Load the Security Information, select Yes.
3. Select Add to load the users and groups from your windows active directory.
4. Select Yes to load groups and users list.
5. Now you can check off groups or users to have access to this collection letter.
6. Select OK when finished. Then OK again.

Attach a Collection Letter to a Collection Status

If you would like to attach collection letters to collection statuses, make sure you have all your letters written and in the Reports component.

1. To attach the letters, go to the Administration Component to the Financial folder, then to Collection Status
2. Select New and Type in the Description the name of the status and/or letter.
3. Click the drop down menu next to Letter on the right panel of the screen and choose the corresponding collections letter.
4. Continue these steps for each letter and status
5. Select Save when finished.

Note: you may or may not want to attach a letter to the collection status of NEW. Some clients use this status as a tickler file and they want to determine whether or not that patient's visit will need to receive letters.

Leave the status of NEW on the top of the list.