NHS Health Checks
Recall Library Query Set Overview

Prepared by the PRIMIS Information and NHS Health Checks Teams
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Query Files

The queries that need to be run for this topic are:

CCALL.HQL  AAAGE.HQL  AACHD.HQL  AACKD.HQL  AAAF.HQL  AAHYPER.HQL
AACVA.HQL  AADIAB.HQL  AAFCHOL.HQL  AAHF.HQL  AAHYP.HQL  AAR1.HQL  AAR2.HQL
AAPAD.HQL  AASTAT.HQL  AATIA.HQL  AAR1.HQL  AAR2.HQL  AAR3.HQL  AAR4.HQL  AAR6.HQL  AAR7.HQL  AAR8.HQL
AAR9.HQL  AAR10.HQL  AAR11.HQL  AAR12.HQL  HCREPA.HQL  HCREP.HQL

When run through the clinical system, each of these will create a file with the same name, but with an extension of .CSV

Patient criteria necessary for being analysed by this query

All the patients who are analysed by this query set (and who can therefore be seen on the datasheet) will:

- be aged >= 40 AND <75 at the CHART Reference Date; and
- NOT have a diagnosis code at any time for any of the following diseases:

  - Atrial Fibrillation (unresolved)*
  - Coronary Heart Disease (CHD)
  - Chronic Kidney Disease (CKD) Stages 3-5
  - Cerebral Vascular Accident (CVA) Stroke
  - Diabetes (unresolved)*
  - Familial Hypercholesterolaemia
  - Heart Failure (unresolved)*
  - Hypertension*
  - Peripheral Arterial Disease
  - Transient Ischaemic Attack

- OR have a prescription for Statins in the last 12 months

*Patients with a diagnosis of Atrial Fibrillation, Diabetes, Heart Failure or Hypertension, who also have a subsequent resolved code for that disease, will appear in the datasheet.
## Datasheet columns

The following columns can be seen in the datasheet:

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>COMES FROM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usual GP</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Reference</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Surname</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Forename</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>NHS Number</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Age</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Sex</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Registered Date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Title</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Address</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Postcode</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>AF Resolved Date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Diab Resolved Date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>HF Resolved Date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Hypertension Resolved</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Latest HCheck code Last 5 yrs</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Latest HCheck date Last 5 yrs</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check indicated code</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check indicated date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Invited for Health Check code</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Invited for Health Check date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check declined code</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check declined date</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check DNA code</td>
<td>MIQUEST</td>
</tr>
<tr>
<td>Health Check DNA date</td>
<td>MIQUEST</td>
</tr>
</tbody>
</table>
What the datasheet shows

The ‘AF Resolved Date’, ‘Diab Resolved Date’, ‘HF Resolved Date’ and ‘Hypertension Resolved Date’ columns display the date of resolved codes for the four disease areas, but only if the resolved code is later than the diagnosis code. If a patient has a diagnosis code later than a relevant resolved code, they will be excluded from the recall list.

Where patients have had an NHS Health Check code in the last five years, the code and date are shown.

The mail merge spreadsheet is generated automatically. Patients who have had a health check in the last five years are NOT included in the mail merge list.
Filters

1. Filters have been set at the tops of columns to aid with patient identification.

2. There is also a preset filter which can be accessed:

Please refer to the CHART Manual for your version of CHART (Excel 2003 or Excel 2007) for details on how to use preset filters.
What the summary sheet shows

The summary sheet shows:

- The Practice Population
- The number of patients aged 40-74 currently registered with the practice who do not have a diagnosis or medication code as specified above
- The number of patients who have had an NHS Health Check in the five years before the Reference date

---

**NHS Health Check Tower Practice**

<table>
<thead>
<tr>
<th>Description</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice Population</td>
<td>5296</td>
</tr>
<tr>
<td>Total number of patients aged 40-74 registered with the Practice not in specific disease / medication categories</td>
<td>1686</td>
</tr>
<tr>
<td>Of which, the number of patients who have had an &quot;NHS Health Check Completed&quot; code added to their record in the last 5 years</td>
<td>4</td>
</tr>
</tbody>
</table>

Data extracted on 27/03/13 using Reference date 27/03/13
How to create mail merge letters

The queries produce a list of patients who may be eligible for an NHS Health Check. A clinician should review the list of patients provided before the letters are sent out. Should you encounter any problems with the mail merge process, please refer to the ‘Troubleshooting’ section at the end of this document.

Steps 1-4 are the same for Word 2003 and 2007, then follow the remaining steps under the heading ‘In Word 2003’ or ‘In Word 2007’.

1. Run the named queries and load the results into CHART; the response file to be selected is HCREP.CSV. Closing CHART at this stage is not necessary.

2. Open the directory:

   C:\CHART\NHS_HC_Recall\n
   There are two documents:

   **mmerge.xls** this is the Excel spreadsheet that contains the patient details that will be used to create the letters

   **HCheck letter.doc** this is the Word Document that will be used to create the letters

3. Open the HCheck letter.doc and click ‘Yes’ when the following message appears:

   ![Microsoft Office Word dialog box](image)

   If you get a message asking you to ‘Select Data Source’ at this stage, please refer to the Troubleshooting section at the end of this document.
4. In the Word document, enter the practice address in the right hand corner where it states ‘Add Practice Address’ and scroll down to enter the standard text for your letter. Do not edit any of the name or address information. This will be visible for one patient at this stage. An invitation letter template has been developed and tested and can be downloaded here:


**In Word 2003:**

5. Select the ‘Mail Merge’ option from the ‘Tools’ menu, as shown below:

The letter will be shown (with the new text) with the ‘Mail Merge’ menu to the right-hand side.
6. Click on ‘Next: Write your letter’ to continue.
7. Click on ‘Next: Preview your letters’.
The arrow keys (indicated by the red arrow above) can be used to scroll through the letters, showing each patient’s name and address.

There are two methods for excluding patients from the mail merge:

a) If there are very few patients to exclude, scroll through to find the relevant patient and click on the ‘Exclude this recipient’ button.

b) If there are a number of patients to exclude, click on the link: ‘Edit recipient list’ (shown by the blue arrow). The following message box will be shown:
Click to untick each patient to be excluded. The columns can be filtered by clicking on the down-arrows to the left of each column heading or double-click on a heading to sort by that field. Then click on ‘OK’ to continue.

8. You are now at **Step 5 of 6** (see previous image). Click on the text ‘Next: complete the merge’

9. Click on the link to ‘Edit individual letters’. This will show the ‘Merge to New…’ message box:

If you choose ‘All’, Word will create letters for all the patients in the mmerge.xls spreadsheet who haven’t been excluded. These can then be printed, or letters can be selected for printing by their page numbers e.g. Pages 1-50
In Word 2007

5. After following the initial instructions above and editing the standard text in the letter, click on the ‘Mailings’ tab.

6. Clicking on the ‘Edit Recipient List’ option will display the following message box:

As with Word 2003, patients can be unticked to exclude them from the mailing. Columns can be filtered and sorted using the links beneath the ‘Refine recipient list’ heading.
7. Clicking on the ‘Start Mail Merge’ option allows you to choose the ‘Step by Step Mail Merge Wizard’ which uses the same functionality as Word 2003 (please see the previous instructions).

Alternatively, choose the ‘Finish & Merge’ option and select ‘Edit Individual Documents’.

8. This will show the ‘Merge to New Document’ message box. If you choose ‘All’, Word will create letters for all the patients in the merge.xls spreadsheet who haven’t been excluded. These can then be printed, or letters can be selected for printing by their page numbers e.g. Pages 1-50.

Please note that letters will not be produced for patients who are coded as having had an NHS Health Check in the five years prior to the reference date.
Please note that the mmerge.xls file is refreshed each time the HCREP.CSV response file is opened in CHART. Please rename it (e.g. Hcheck_mmerge_02/03/2013.xls) if you wish to keep a copy before loading up a subsequent response file. The mail merge letter will only link to a file called mmerge.xls.
Trouble Shooting

1. If you see the following error message, close Word and CHART down and reopen CHART. This message occurs if you have the mail merge letter (HCheck letter.doc) already open when you load up the CHART responses:

   ![Microsoft Visual Basic Error Message]

2. If the mail merge spreadsheet is moved from its original location, the link will be broken and you will see the following message box when you click ‘Yes’ to link to the mail merge data source (step 3). Click ‘OK’.

   ![Microsoft Office Word Error Message]
You will then see the following message box. If you know the new filepath for the mmmerge.xls file, type it in here and click ‘OK’. You will be taken back to the letter and can resume the mail merge process from this stage.

If you are not sure of the filepath, click on ‘OK’ and you will see the following message box.

Click ‘OK’ and you will see the following message box. Click on ‘Find Data Source’.
You will see the following message box.

Browse to the mmerge.xls file.

Then click on the ‘Open’ button to select the mmerge.xls. Click ‘Ok’ to continue when you see the following message box and resume the mail merge process.
Tips for using the mail merge function

You are unlikely to want to print off and send out invitation letters to everyone eligible for a health check all in one batch. In order to group the mail merge process into manageable chunks, you may wish to:

- Ensure CHART and the HCheck letter.doc are closed
- Copy the mmerge.xls file and save it with another name e.g. mmerge_original.xls
- Open the mmerge.xls file and sort by Surname
- Delete all patients with a surname beginning with letters other than A:C
- Open the HCheck letter.doc and follow the steps for the mail merge

You could also sort the mmerge.xls spreadsheet by Age or Registered_date.

Alternatively, you could filter out patients with a surname other than A:C in the mail merge process (set the filter to SURNAME < D) and generate a smaller batch of invitees that way instead.