

# I N D I V I C A

## Mass Label Generation

*Note that Indivica supports only OSCAR use. These steps are to be taken at the users' own risk.*

OSCAR has no built-in ability to print patient labels en masse. However, this guide exploits built in features of OSCAR as well as those found within Microsoft Excel and Word to create this effect.

This guide uses Microsoft Office Professional Plus 2010 which includes Microsoft Excel 2010 and Microsoft Word 2010 on a Windows 7 computer. Different versions of these programs and operating system might have different menus or not include these features at all.

### 1. Exporting Addresses from OSCAR

#### 1.1. Report by Template

Report By Template is a function in OSCAR which will allow you to query the system using pre-determined criteria. This is the easiest way to export your addresses.

1.1.1. Click on Admin.

1.1.2. Click on Report by Template



1.1.3. Click the Template you wish to use.

Note: Active Demographics will provide you with all patients for a provider that are marked as “Active”.

Annual Letter Report will provide you with all patients with a provider that are marked as “Active” and have the field Newsletter set to “Paper” on their Master Demographic File.

1.1.4. Follow the template’s specific instructions; e.g. choose a provider. Click Run Query.



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Report	Report By Template
<b>Select a template:</b> <a href="#">Main Page</a> 1. <a href="#">Active Demographics</a> 2. <a href="#">Schedule Look Ahead - No eChart</a> 3. <a href="#">Block Fee Report</a> 4. <a href="#">eChart Count</a> 5. <a href="#">Annual Letter Report</a> 6. <a href="#">Schedule Look Ahead - NR</a> <a href="#">Add Template</a>	<b>Active Demographics</b> Reports Active Patient Addresses <div> <b>Step 1:</b> Provider Number <input type="text" value="Banner, Bruce (012345)"/> </div> <div> <b>Step 2:</b> Generate Query <input type="button" value="Run Query"/> </div> <a href="#">Show/Hide Options</a>

- 1.1.5. A list of results will appear. Click Export to XLS. A file will be downloaded titled oscarReport.xls.

Report	Report by Template																																																						
<b>Select a template:</b> <a href="#">Main Page</a> 1. <a href="#">Active Demographics</a> 2. <a href="#">Schedule Look Ahead - No eChart</a> 3. <a href="#">Block Fee Report</a> 4. <a href="#">eChart Count</a> 5. <a href="#">Annual Letter Report</a> 6. <a href="#">Schedule Look Ahead - NR</a> <a href="#">Add Template</a>	<b>Active Demographics</b> Reports Active Patient Addresses <div> <table border="1"> <thead> <tr> <th>last_name</th> <th>first_name</th> <th>address</th> <th>city</th> <th>province</th> <th>postal</th> </tr> </thead> <tbody> <tr> <td>DIABETES</td> <td>DEBBIE</td> <td>200-18 Diabetus Ave</td> <td>Toronto</td> <td>ON</td> <td>L2A6G0</td> </tr> <tr> <td>DIABETES</td> <td>DERRIK</td> <td>201-18 Diabetus Ave.</td> <td>Toronto</td> <td>ON</td> <td>L2A6G0</td> </tr> <tr> <td>OKAMURA</td> <td>HIRO</td> <td>41 Hirohito Dr.</td> <td>Toronto</td> <td>ON</td> <td>M5E1Z9</td> </tr> <tr> <td>PRINCE</td> <td>DIANA</td> <td>1 First</td> <td>Amazonia</td> <td>ON</td> <td>1A16Z0</td> </tr> <tr> <td>REYES</td> <td>JAIME</td> <td>100 Fourth Ave</td> <td>El Paso</td> <td>OT</td> <td>90210</td> </tr> <tr> <td>STEWART</td> <td>JOHN</td> <td>21 Huntsman Ave</td> <td>Star City</td> <td>ON</td> <td>R1S8Z8</td> </tr> <tr> <td>TEST</td> <td>MICHAEL</td> <td>1 Main Street</td> <td>Toronto</td> <td>ON</td> <td>M1M 1M1</td> </tr> <tr> <td>WILSON</td> <td>WADE</td> <td>321 Trump Tower</td> <td>Toronto</td> <td>ON</td> <td>L4B 3T6</td> </tr> </tbody> </table> </div> <div> <a href="#">Hide/Show Query</a>  <input type="button" value="Back"/> <input type="button" value="Print"/> <input type="button" value="Export to CSV"/> <input type="button" value="Export to XLS"/> </div>	last_name	first_name	address	city	province	postal	DIABETES	DEBBIE	200-18 Diabetus Ave	Toronto	ON	L2A6G0	DIABETES	DERRIK	201-18 Diabetus Ave.	Toronto	ON	L2A6G0	OKAMURA	HIRO	41 Hirohito Dr.	Toronto	ON	M5E1Z9	PRINCE	DIANA	1 First	Amazonia	ON	1A16Z0	REYES	JAIME	100 Fourth Ave	El Paso	OT	90210	STEWART	JOHN	21 Huntsman Ave	Star City	ON	R1S8Z8	TEST	MICHAEL	1 Main Street	Toronto	ON	M1M 1M1	WILSON	WADE	321 Trump Tower	Toronto	ON	L4B 3T6
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## 1.2. Adding Templates

More templates can be added to the system under Report by Template if you wish to specifically display other information that the default templates do not. To do this, a proficiency is required in SQL scripting.

1.2.1. Click on Admin.

1.2.2. Click on Report by Template.

1.2.3. Click Add Template.

1.2.4. Click Choose File. The file extension the upload expects is an .xml file that contains SQL script.

1.2.5. Click Upload & Add.



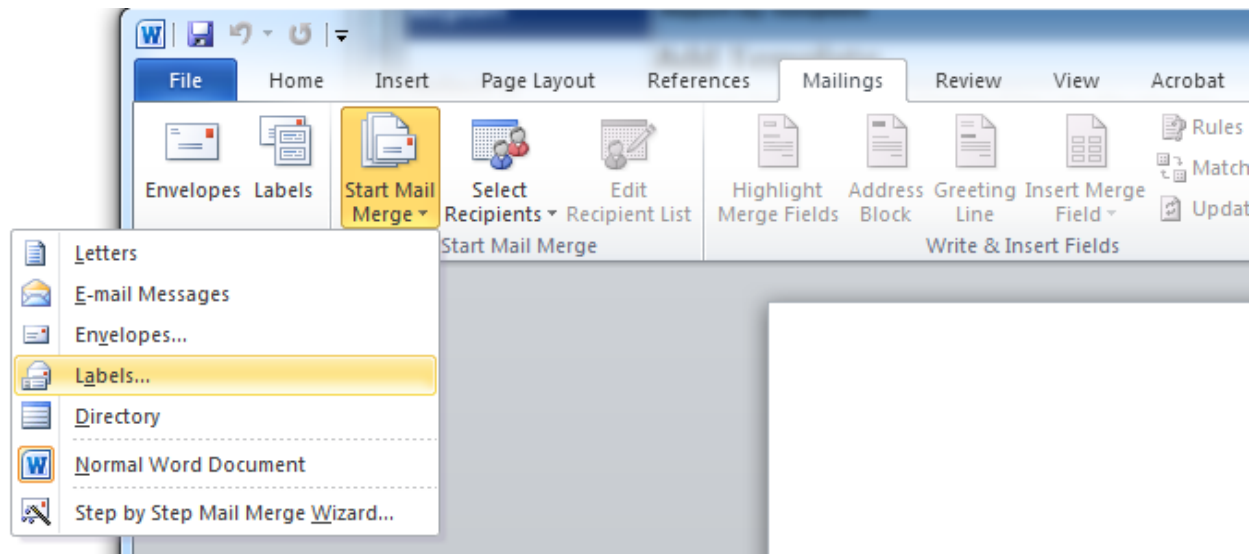
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## 2. Creating and Formatting Labels

### 2.1. Configuring Word

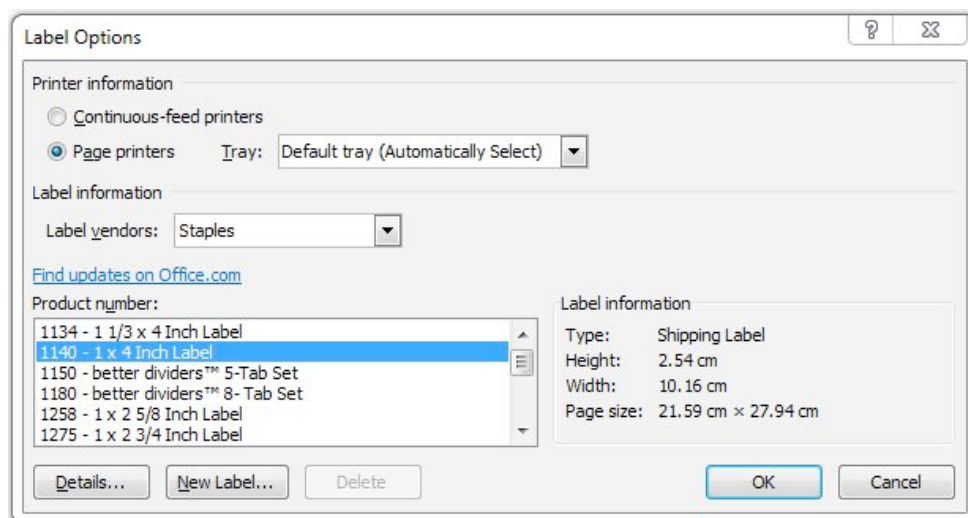
2.1.1. Open Word.

2.1.2. In the Mailings tab, click Start Mail Merge. Click Labels. A new window appears.



2.1.3. Adjust the settings as appropriate.

Note: In this example, my Label vendor was “Staples” and the size specified on the package was “1x4 inches”. If your label does not appear, go to Section 2.2 Custom Label Size.

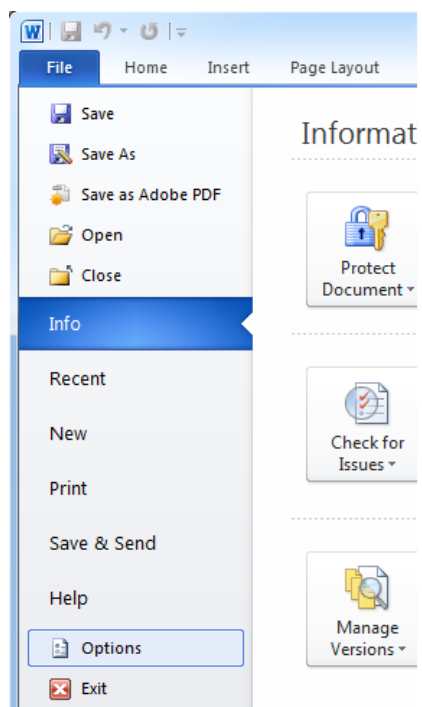


2.1.4. Click OK.



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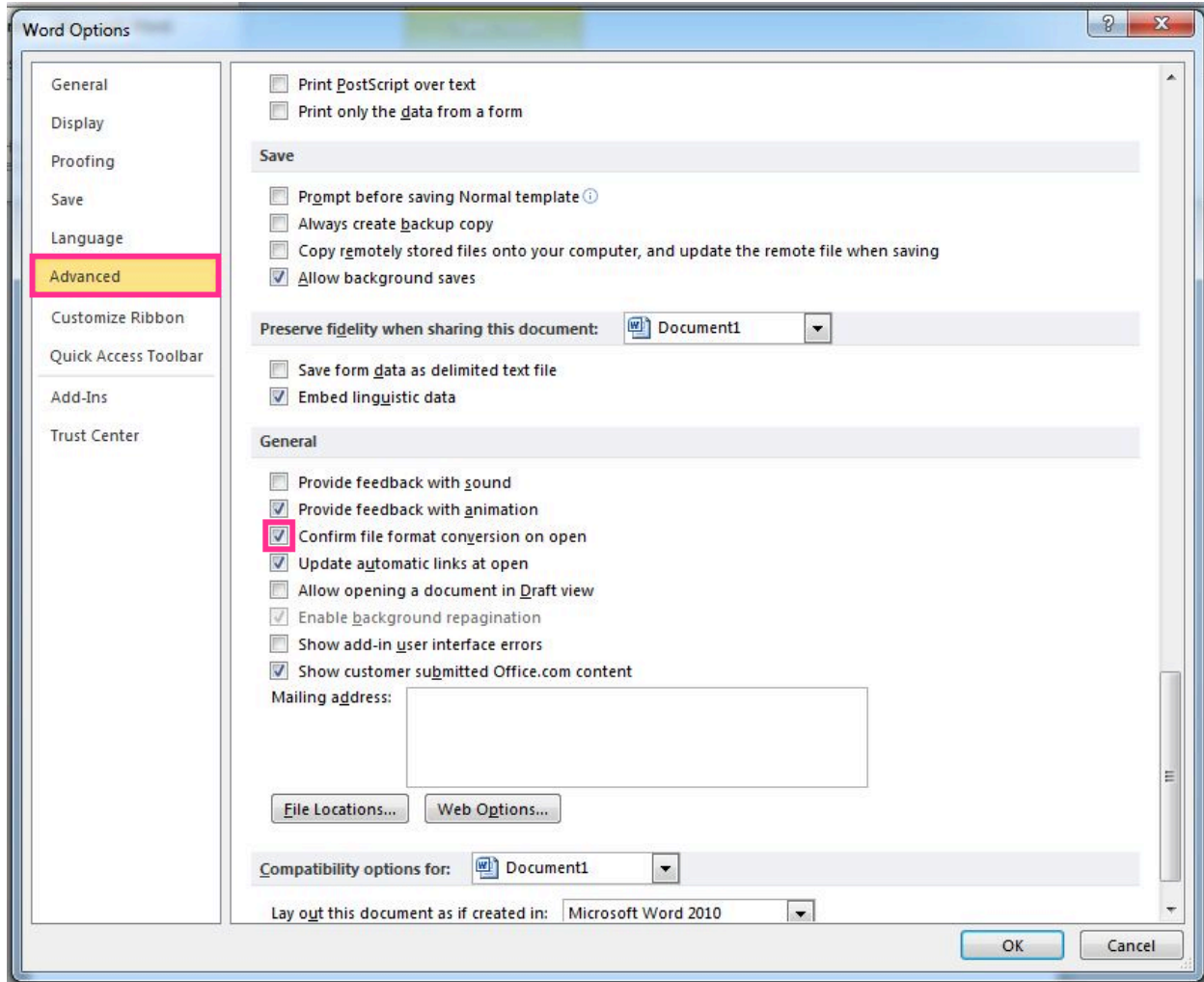
- 2.1.5. Skip steps 2.1.6-8 if you have done them previously. These settings are saved.
- 2.1.6. Go to File then click Options.



- 2.1.7. Under the Advanced Tab, find the General heading. Make sure “Confirm file format conversion on open” is checked.



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2.1.8. Click OK.

## 2.2. Custom Label Size

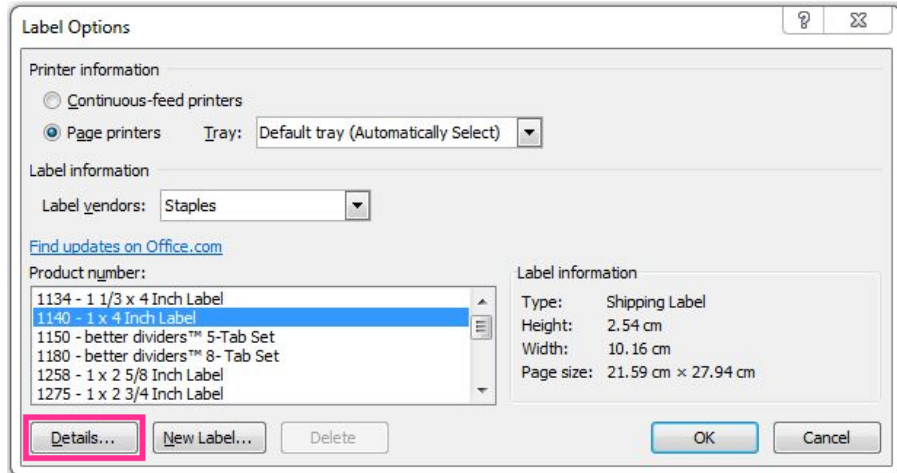
Follow these steps if the labels you are using are not displayed during step 2.1.3 then continue with steps 2.1.4-8. Otherwise, skip these steps.

2.2.1. Find the label size that is closest to the ones you have.

2.2.2. Click Details. A new prompt appears.



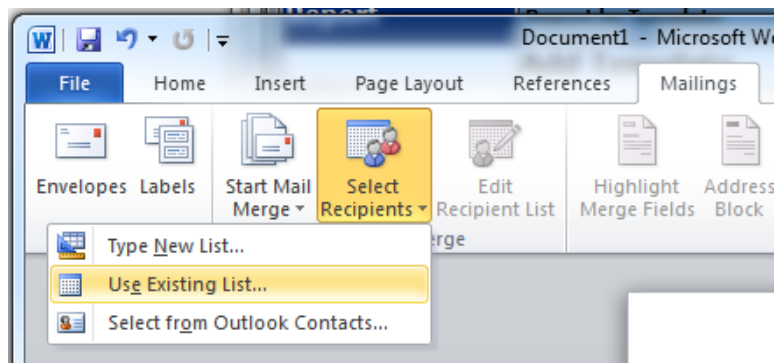
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- 2.2.3. Fill in the appropriate fields with the size of your labels.  
Note: Be sure to measure your labels carefully. Actual labels might be smaller than what the manufacturer indicates.

## 2.3. Merging Files

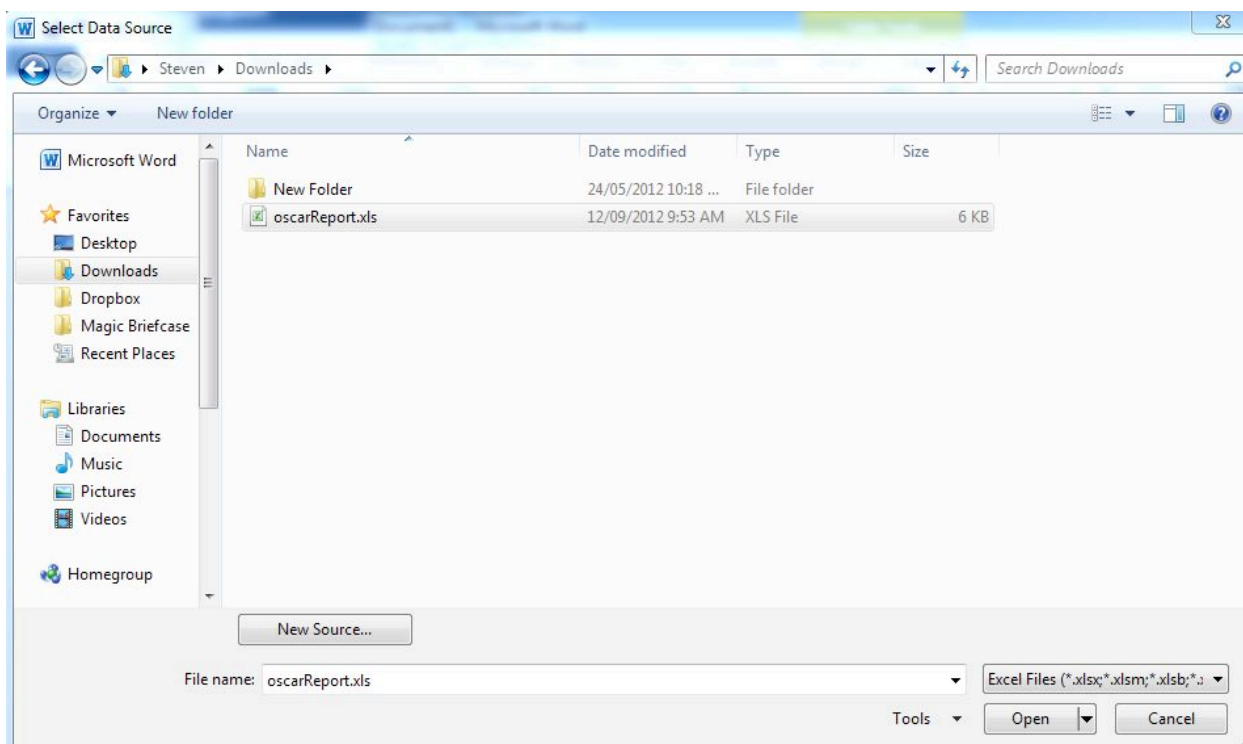
- 2.3.1. In the Mailings tab, click Select Recipients.



- 2.3.2. Click Use Existing List. A prompt appears.
- 2.3.3. Navigate to where you saved your .xls file and select it. See 1.1.5.

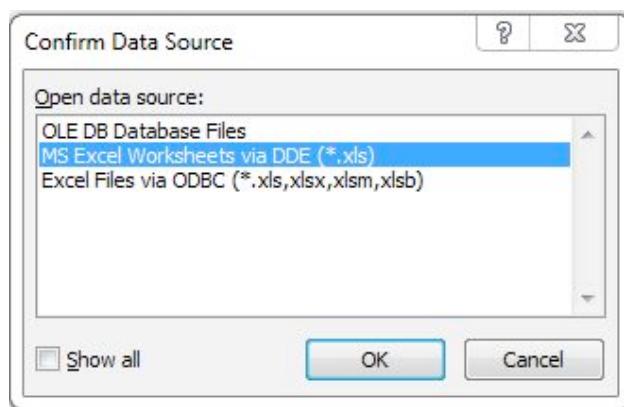


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2.3.4. Click Open. A prompt appears named Confirm Data Source.  
Note: If this prompt does not appear, follow steps 2.1.6-8.

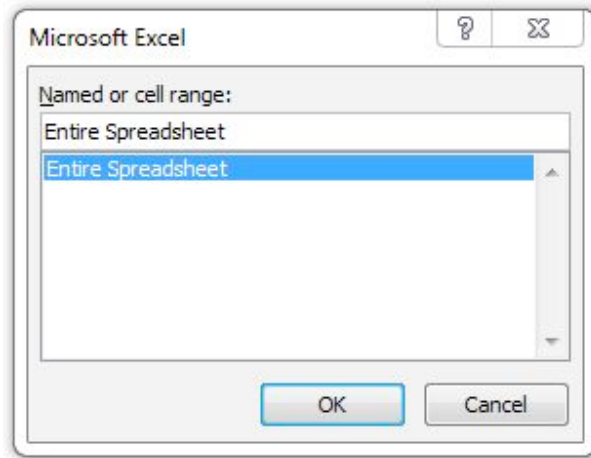
2.3.5. Select MS Excel Worksheets via DDE (\*.xls). Click OK.  
Note: If this option does not appear, check off Show all.



2.3.6. A prompt appears. Check that Entire Spreadsheet is selected and click OK. Your document will populate with (temporary) label placeholders.

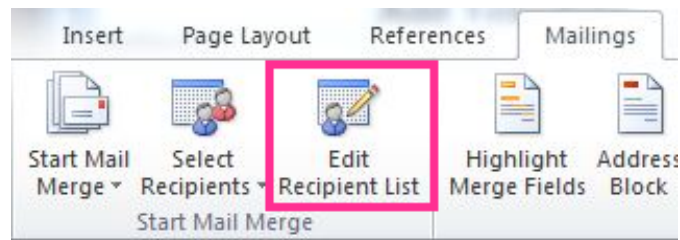


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## 2.4. Selecting Recipients

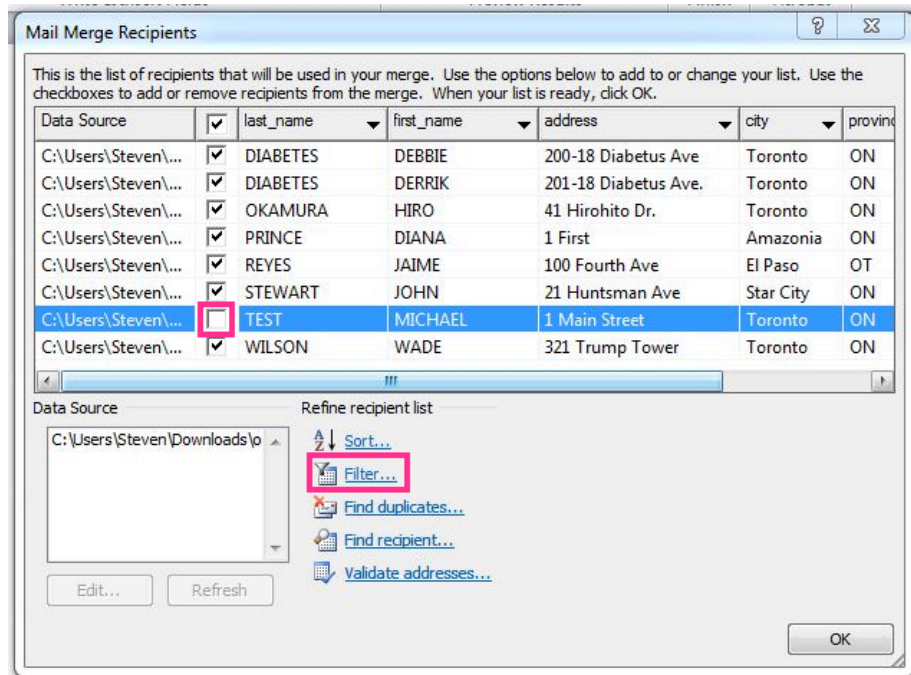
2.4.1. In the Mailings tab, click Edit Recipient List. A new window appears.





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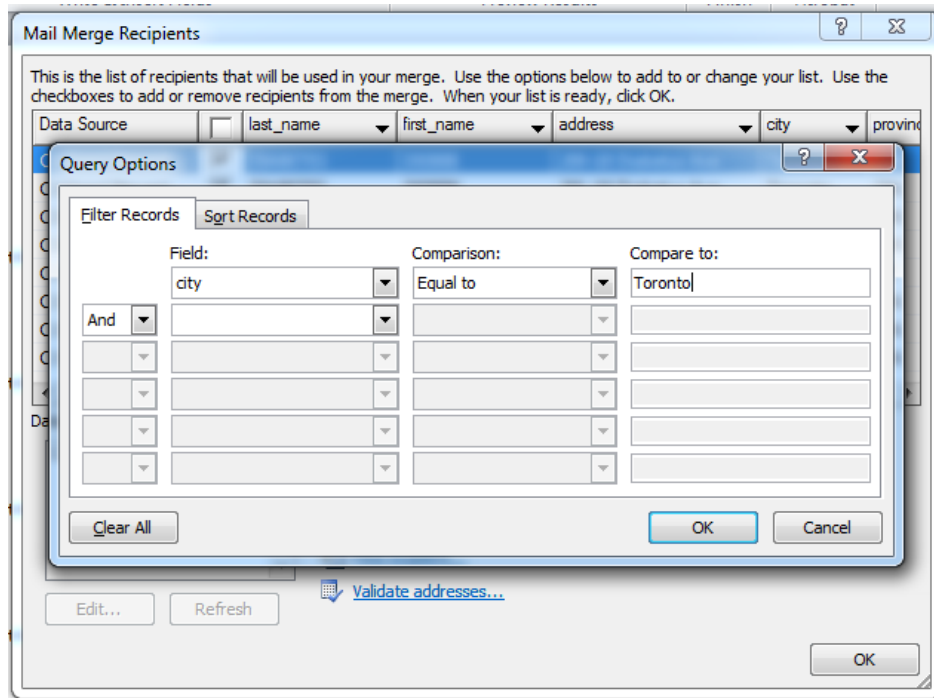
- 2.4.2. Check patients for which labels will be created (all will be included by default).



- 2.4.3. If you do not wish to further filter your patients, skip steps 2.3.4-5.
- 2.4.4. To create a filtering rule for patients, click Filter. A new prompt appears.
- 2.4.5. Use the Field, Comparison, and Compare to fields to generate logic-based rules.  
E.g. The image below will only generate labels for patients whose “city” field (first entered in OSCAR and then exported into the .xls file) is exactly matched with the word “Toronto”.



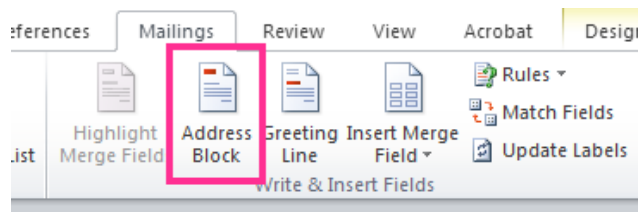
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## 2.5. Formatting Label Text (Address Block)

2.5.1. Check your text-cursor is in the first, empty label placeholder on your document. If not, click inside the first, empty label placeholder (located in the top left).

2.5.2. In the Mailings tab, click Address Block. A prompt appears.



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- 2.5.3. Choose which formatting you want your addresses to appear.  
Note: You can view a preview of your labels to the right. Use the arrows to navigate through your patients.

Insert Address Block

Specify address elements

☒ Insert recipient's name in this format:

Josh  
Josh Randall Jr.  
**Josh O. Randall Jr.**  
Joshua  
Joshua Randall Jr.  
Joshua Q. Randall Jr.

☒ Insert company name

☒ Insert postal address:

☐ Never include the country/region in the address  
☐ Always include the country/region in the address  
☒ Only include the country/region if different than:  
Canada

☒ Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

«» 1 «»

DEBBIE DIABETES  
200-18 Diabetus Ave  
Toronto ON L2A6G0

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields...

OK Cancel

- 2.5.4. Click OK.
- 2.5.5. The first, empty label placeholder will now say <<AddressBlock>>.  
Note: Text contained within chevrons is a placeholder and will be replaced later with real data.

«»

«<<AddressBlock>>»

«<<Next Record>>»

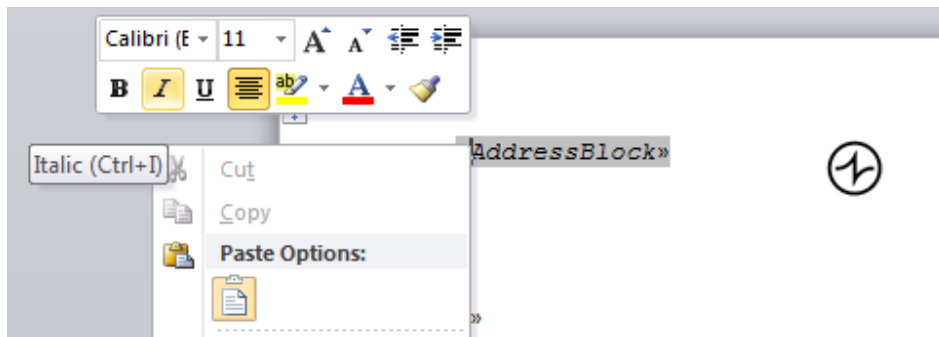
«<<Next Record>>»

«<<Next Record>>»

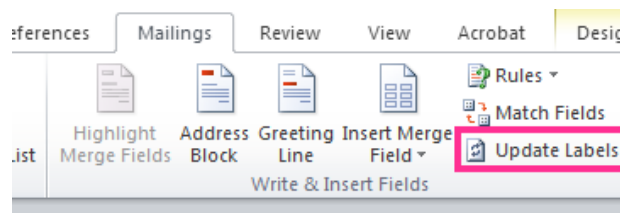


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- 2.5.6. If you wish, you can select <<AddressBlock>> and format the text (e.g. increase/decrease the size, change font, italicize, add images, etc.).



- 2.5.7. When you are satisfied with your label, click Update Labels under the Mailings tab. The temporary label place holders will be replaced with the label you designed.

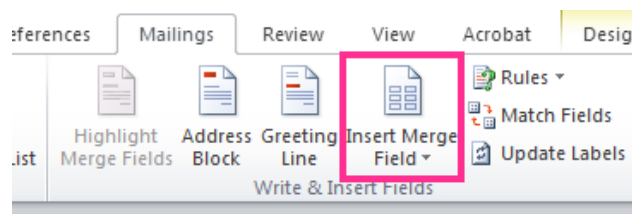


- 2.5.8. Repeat steps 2.3.5-8 if any changes are needed.

## 2.6. Formatting Label Text (Custom)

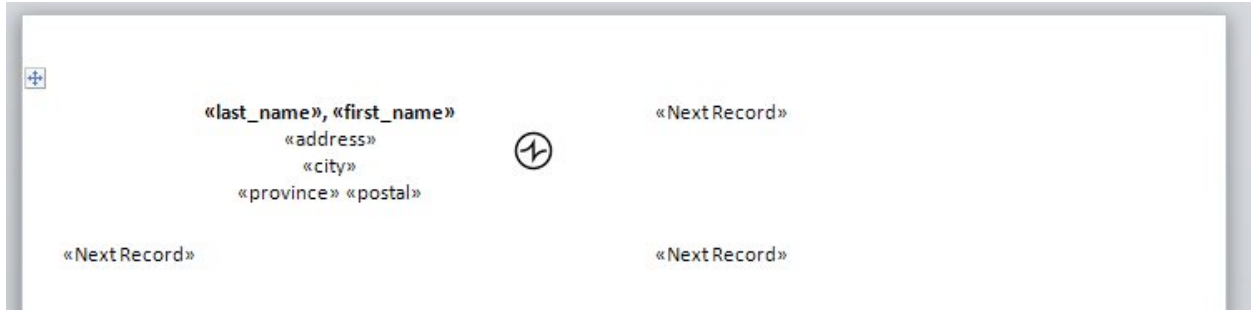
- 2.6.1. Check your text-cursor is in the first, empty label placeholder on your document. If not, click inside the first, empty label placeholder (located in the top left).

- 2.6.2. In the Mailings tab, click Insert Merge Field.



# I N D I V I C A

- 2.6.3. Click the field you wish to appear. A placeholder will appear within chevrons (e.g. <<Text>>).
- 2.6.4. If you wish, you can select a placeholder and format the text (e.g. increase/decrease the size, change font, italicize, add images, etc.).

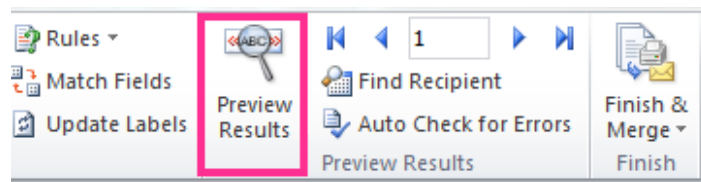


- 2.6.5. When you are satisfied with your label, click Update Labels under the Mailings tab. The temporary label place holders will be replaced with the label you designed.
- 2.6.6. Repeat steps 2.5.2-5 if any changes are needed.

## 3. Preview and Print

### 3.1. Preview Record

- 3.1.1. In the Mailings tab, click Preview Results. All placeholders will be replaced with patient data.



- 3.1.2. To view a specific patient, click Find Recipient. Fill in the fields as appropriate and click Find First.

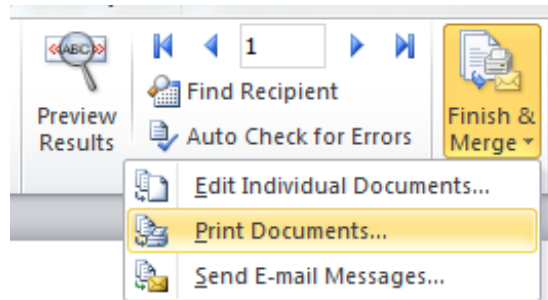


# I N D I V I C A

## 3.2. Printing

3.2.1. In the Mailings tab, click Finish & Merge.

3.2.2. Click Print Documents.



3.2.3. Choose which labels to print. Click OK.

## 4. Saving Labels for Future Use

### 4.1. Saving and Opening the Document

4.1.1. Click on File and Save. Your labels will be saved within a word document.

4.1.2. When you later open this file, a prompt will appear.

If you click Yes, a prompt appears and you will be asked to find the source data. Click on Find Data Source and navigate to an .xls file. When you click Open, your labels will be updated with whatever patient records are contained in that .xls file. This is useful if you created a label you wish to use over and over again but do not wish to go through Section 2. Creating and Formatting Labels. You can simply do Section 1. Exporting Addresses from OSCAR then use this prompt to find it to get an updated list of patients.

If you click No, the document will not retrieve any new information. It will convert the placeholders into text and the document will now behave as a standard Word document.

## 5. References

Microsoft, Create and print mailing labels for an address list in Excel. Retrieved 12 September 2012. <<http://office.microsoft.com/en-us/excel-help/create-and-print-mailing-labels-for-an-address-list-in-excel-HP010243267.aspx>>

