Batch Letter writer

Version: 3.00 | Last Modified on 14/07/2026 8:48 am AEST

The Batch Letter Writer is used for batch processing a practitioner's clinical letters (write, review, distribute) and for writing on-demand clinical letters in Zedmed.

Process a batch of letters

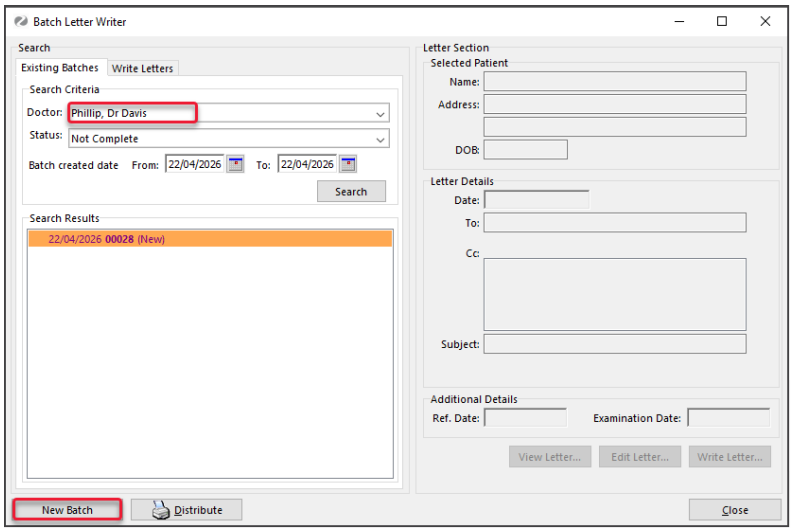
Batching enables practitioners and administrative staff to review all patient attendances since the previous batch. Users can generate clinical letters for these attendances and assign each a status to track its readiness for distribution. Once the entire batch has been reviewed and approved, it can be distributed in bulk.

Step 1 - Create a batch of letters

To identify the practitioner's patients and write their letters:

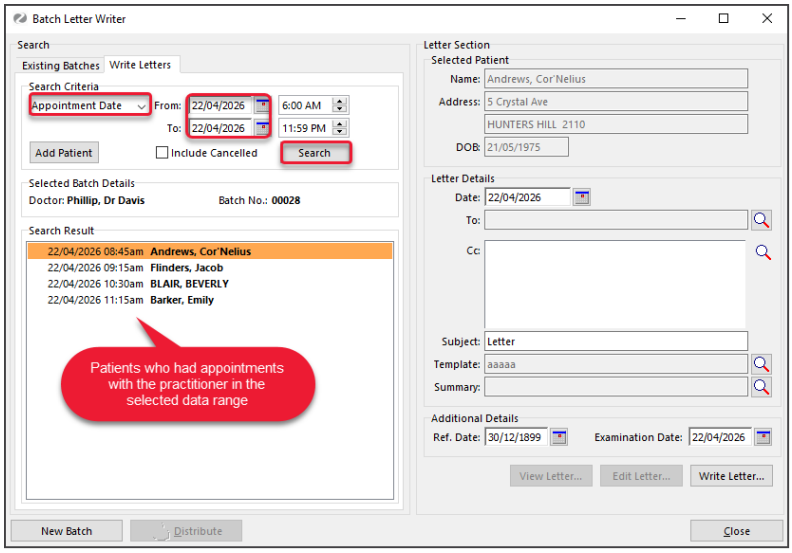
1. Select the **Batch Writer** icon from the main menu in **Clinical**.

   The **Batch Letter Writer** will open on the **Existing Batches** tab.
2. Select the **Doctor** the batch is for.



3. Select **New Batch.**

   This will display the **Write Letters** tab.



4. Select the **From** and **To** period for the batch period.

   This should be the period during which the practitioner saw patients who require a letter written. e.g., that day.
5. Select the **Search criteria** the date range will use: date of **Appointment** or date of **Attendance.**
6. Select **Search**.

   All applicable patients will be listed. Add and remove patients using right-click > **Delete** and the **Add patient** button.
7. Select the first patient to write a letter for.

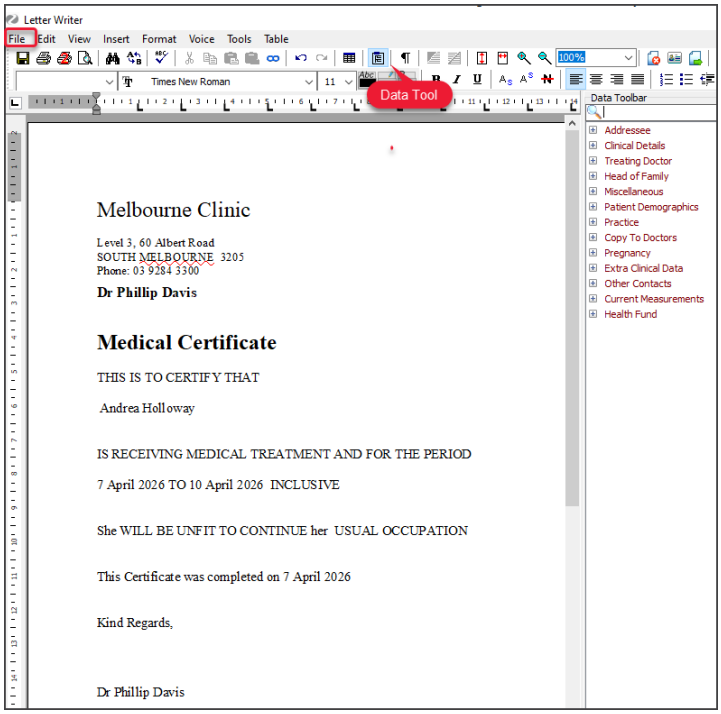
   The letter configurations on the right will become active and auto-populate.
8. **Add the letter's recipient:**
   a. Select the search icon next to **To.**
   b. **Open** the Zedmed **Address Book**

      Contains practice-defined addressees, which can be set up for secure messaging.
   c. In the Address book, locate and select the practitioner to add them as an **Addressee**
9. **Optional**: CC other practitioners in the Address Book.
10. **Review the Subject** and update as required.

    This becomes the letter title in Summary Views. It is not included in the letter.
11. **Choose a template** for the letter.

    Select the **Template** search icon to display all available templates, then double-click a template to add it to the letter setup.
12. Select **Write letter.**

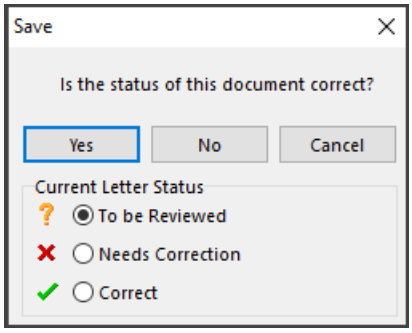
    The letter will open in the Zedmed editor.



13. Update the letter's content.

    The **Data Toolbar** may be used to insert existing patient information into the letter.
14. **Close** the letter using the **X** at the top right or File > Close.
15. You will be asked if you wish to **Save** it using a document status dialog.

    The default status is **To be Reviewed** and the letter will be added to the Letter Batch with a **?** implying it requires review.



Completed letters will appear in green text in the batch list.

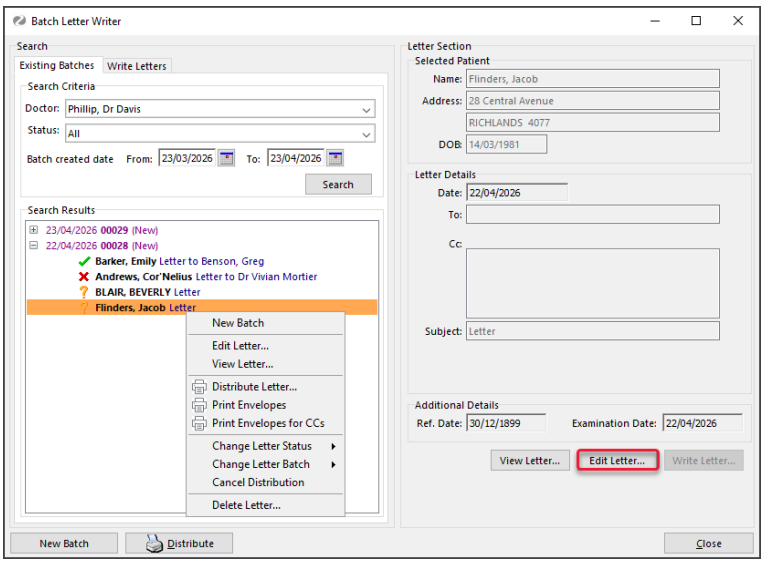
Step 2 - Review the letters

To review the letters and prepare for distribution:

1. Open the **Batch letter writer.**
2. The **Existing Batches** tab displays:
    a. Review the batch search settings: Doctor, batch status and date range for the batch creation.
    b. Select **Search.**
    c. Expand the applicable batch to view the letters (which will show their status).
3. Review each letter and update its status:
    a. Select the letter.
    b. Select **Edit** to open and make the required changes.

c. Close the letter.
d. Select the new status when prompted e.g, **Correct.**

Note: You can also update the letter's status within the Batch by right-clicking the letter >**Change letter status**.



Step 3 - Print or distribute the letters

To distribute the batch of letters:

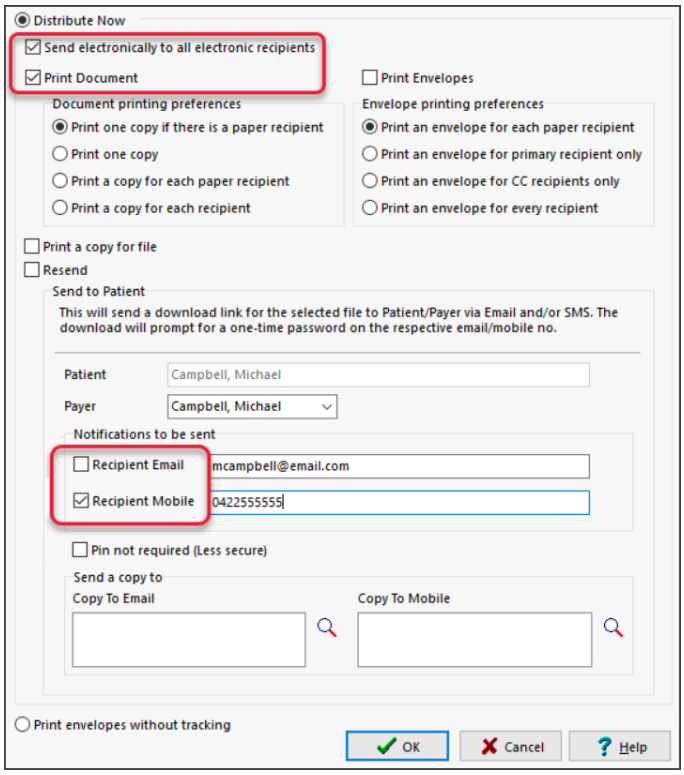
1. Open the **Batch Letter Writer.**
2. Locate the batch on the **Existing Batches** tab:
    a. Select the search settings: Doctor, batch status and date range for the batch creation.
    b. Select **Search.**
3. Right-click the batch and select **Distribute batch**.
4. Select **Yes** on the warning.
5. Use the Print/Send options shown below. All options may be used at the same time.
    a. **Option 1 - Print**:
        i. Select the **Print Document** radio button and **Document Printing Preference.**
    b. **Option 2 - Send electronically**
        i. Check that **Send electronically to all electronic recipients** is selected, then select **OK**.

        Important: When using **Secure Messaging,** the addressees must be set up in the Address Book with the secure messaging service they use and the practice sending the letter must have the same secure messaging service as the addressee.



c. **Option 3 - Use Secure Send**
    i. Select the recipient's **Email** or **Mobile**.
    ii. Use **Copy** to add other recipients.

6. Select **OK.**



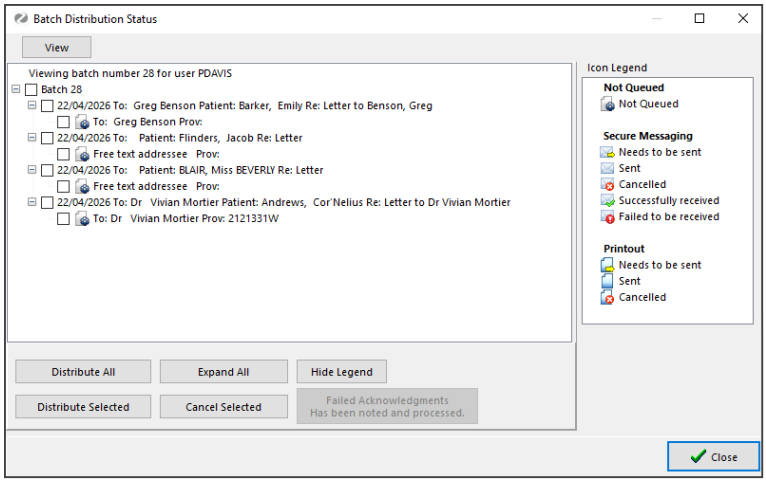
Printed/Distributed letters are saved in **Summary View > Documents > Letters.**

NOTE: If you need to reprint letters, select the **Resend checkbox** otherwise the software will take no action as it knows you have already printed.

7. Once all letters are distributed, right-click the batch and select **Change Batch Status** > **Complete.**

8. To monitor distribution, right-click the batch and select **Batch Distribution Status**.
9. The Batch Distribution status screen has an icon legend to show the status of each letter.

   The functions at the bottom can be used to action specific letters.



Write a single letter

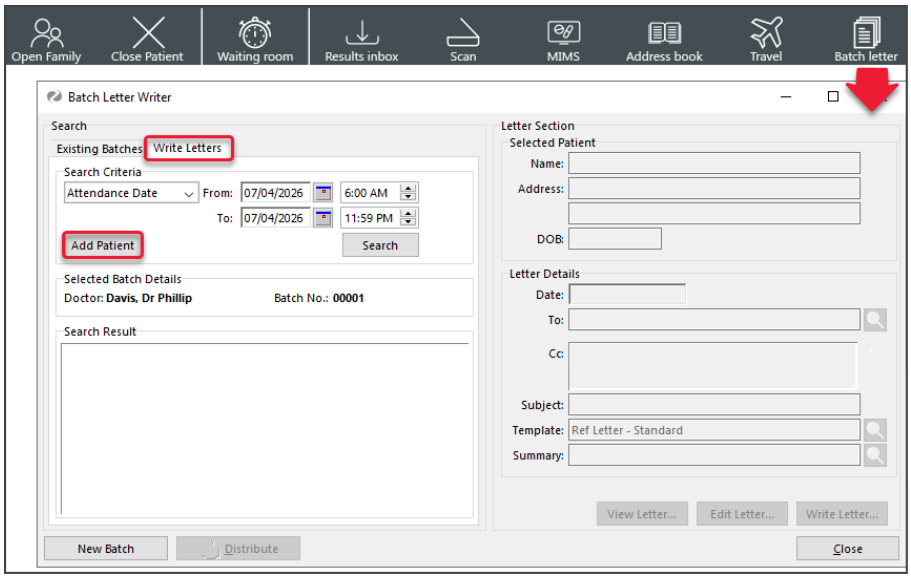
The Batch Writer can be used to write a single on-demand clinical letter.

To write a letter:

1. Select **Batch Letter** icon from the main menu in **Clinical**.

   The **Batch Letter Writer** will open.
2. Select the **Write Letters** tab (if it is not already selected).
3. Select **Add Patient.**

   Use the **Find Patient** screen to locate and select the patient the letter is about.



4. When the patient is selected, the letter configurations on the right will become active and auto populate. If the patient has a referral recorded, the referring practitioner's details will display in the **To** field.
5. **Add the Addressees**:
   a. Select the search icon next to **To.**

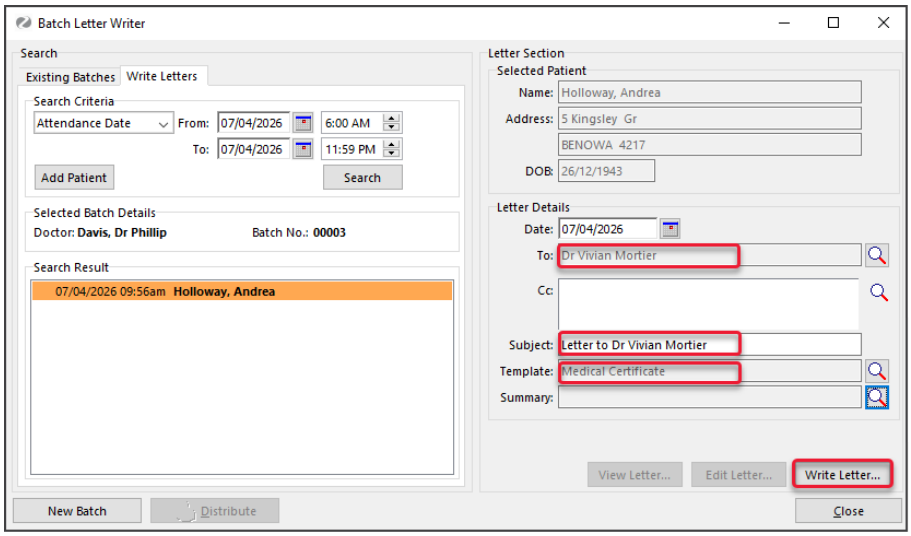
b. **Open** the Zedmed **Address Book**

Contains practice-defined addressees, which can be set up for secure messaging.

c. In the Address book, locate and select the practitioner to add them as an **Addressee**.

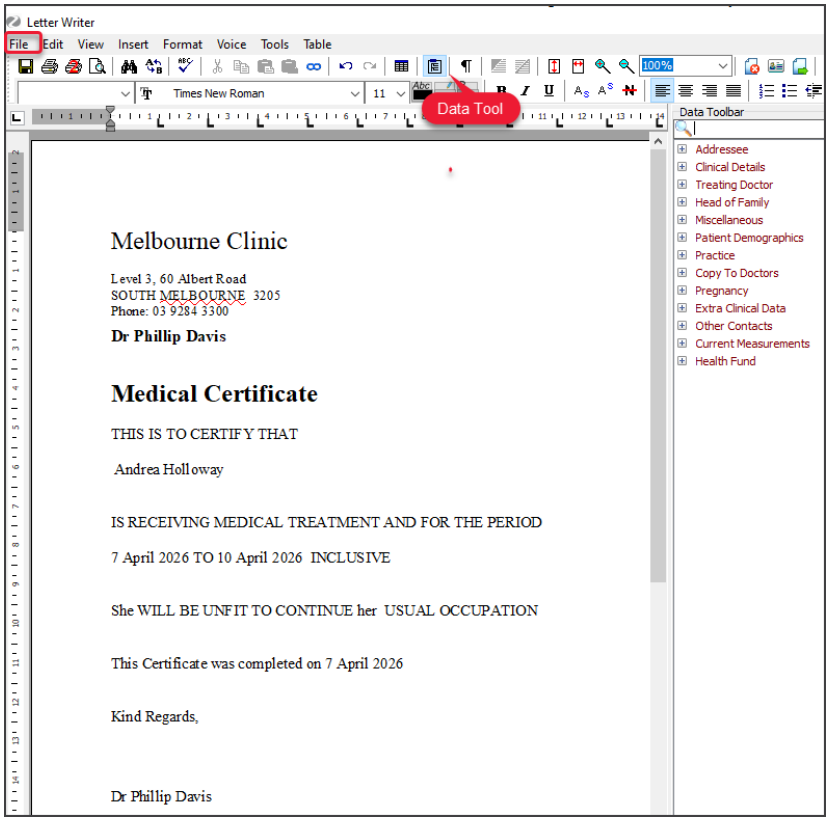
6. **Optional**: CC other practitioners from the Address Book.
7. **Review the Subject** and update as required - this becomes the title of the letter in Summary Views, it is not included on the letter.
8. **Choose a template** for the letter.

   Select the **Template** search icon to display all available templates, then double-click a template to add it to the letter setup.
9. Select **Write letter**.

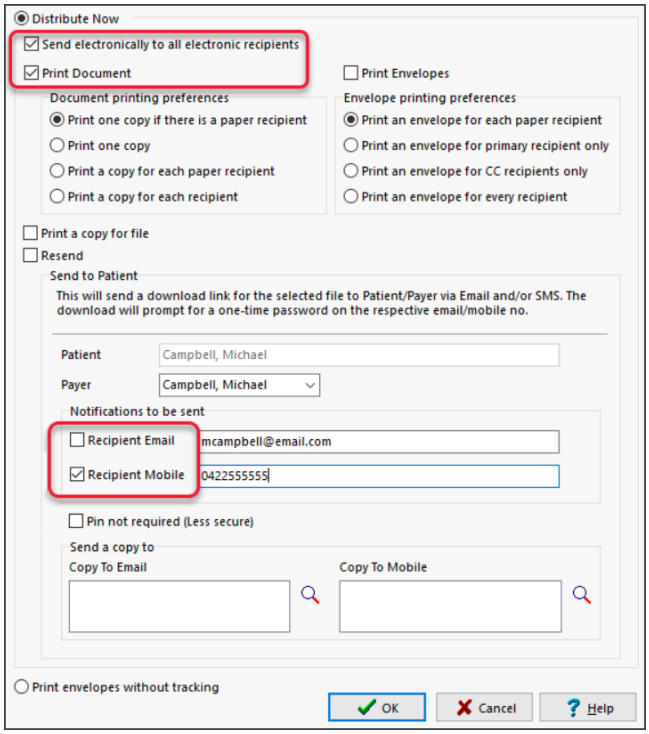


The letter will open in the Zedmed editor.

10. Update the letter's content. The **Data Toolbar** may be used to insert existing patient information to the letter.



11. To manage distribution of the letter select the **File** menu > **Print** or **Distribute** to **Send** the letter electronically as explained below.



12. **Print the letter:**
    a. Select **File** > **Print**
    b. Select the printer and **Ok**.
    c. When you close the letter, select the 'status' on the **Save** dialog.
13. **Send the letter electronically using Secure Messaging:**
    a. Select **File** > **Distribute**.
    b. Check that **Send electronically to all electronic recipients** is selected.
    c. Select **OK**.
    d. When you close the letter, select the 'status' on the **Save** dialog
    e. The letter will be sent. Use the Outbox Viewer to see the status of distributed letter.

    Important: When using **Secure Messaging**, the addressees must be set up in the Address Book with the secure messaging service they use, and the practice sending the letter must have the same secure messaging service as the addressee.
14. **Use Secure Send**
    a. Select **File** > **Distribute.**
    b. Select the recipient's **Email** or **Mobile**.
    c. Use **Copy** to add other recipients.
    d. When you close the letter, select the 'status' on the **Save** dialog.

    Completed letters **will be saved in Summary Views > Documents > Letters**.