


## Adults Quick Guide

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### Using Letter Templates

Letter templates can be found within the **Forms and letters** icon  within most Adult Care workflow steps and also within Correspondence workflow steps, accessed via the **Start** sidebar menu.

**Adult Correspondence General** is the step practitioners and Business Support will use.

There are other Correspondence steps for different teams containing relevant templates for their role/team for example **Adult OT Correspondence General** for OTs

Any letters created will automatically save to the **Documents > Forms and letters** tab of the person's record.

A letter can be printed during the creation process or later from the **Documents** section.

### Opening and Completing a Letter Template

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In the Adult Care or Correspondence workflow step window:

- Click the **Forms and letters** icon 


The **Optional forms and letters** window displays.

This window displays a list of available templates. This list will vary depending on which workflow step you are in.

The letter templates are listed in the right-hand side if you are in an Adult Care workflow step and you will only see letter templates in the list if you are in a Correspondence step.

- Click the **hyperlink** of the required letter to open the template

Once the required letter template has been opened the letter will display in a separate tab within the workflow step window.

The letter template can be closed (deleted) if not required using the **delete bin** icon 

Multiple letter templates can be opened within one workflow step, if appropriate to do so.

The recipient details within the yellow **Recipients** section at the top of the template will automatically display as the person's record you are in.


The recipient or recipient's details can be edited:

- Click the **Edit** button 

The **Letter recipients details** window will display

- Click the **edit pencil** icon  to edit the recipient's details

The name, salutation, role and address fields can be amended as appropriate and saved by clicking the **Save changes** button

- Click the **delete bin** icon  to remove a recipient
- Click the **Add Recipient** button to find the correct recipient and/or add additional recipients as necessary.

You can search for a person, worker or organisation to add them as a recipient – remember to use the correct tab when searching.

There is an **Add Recipient** button in both the '**Primary recipient(s)**' and '**Copy To**' sections.

When printed, a letter is generated addressed to each recipient listed within the **Primary Recipient(s)** section.

A letter will not be generated addressed to the recipients listed in the 'Copy To' section. This is purely a way of logging who has been sent a copy of the letter; you will therefore need to consider whether it is necessary to create a covering letter template to accompany the copy of the letter and any relevant documentation.

- Click the **Close** button to close the **Letter recipients details** window and return to the letter template
- All recipients/updated recipient details will show in the yellow **Recipients** section
- The 'Recipient's Name', 'Recipient's Address' and 'Salutation' sections are inactive (greyed out), these will populate with information from the **Recipients** section when the letter output is created
- The 'Sender's' and 'Worker details' fields prepopulate as the worker completing the template, these can be edited if necessary (i.e. if Business Support are completing the letter on a practitioner's behalf, practitioner's details are incorrect or certain details need to be excluded from the final letter).
- The 'Date' will prepopulate with today's date (the date the template is being completed)

Each letter template will have different additional fields depending on the type of letter.


These fields could be Date, Time, dropdown and free text fields which would all be completed as required.

Some letter templates will also give you the option to include or exclude additional fields or information.

To save the letter at any stage:

- Click the **Save** icon 

A copy of the letter will be saved into the person's **Documents** section. It will be available for further editing until the workflow step it is being created in is 'Finished'.

To view the letter as a PDF, or print the letter click the **Output current document** icon 

## Printing a Letter

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Letters can be printed from within the workflow step it is created in or from the **Documents > Forms and letters** tab.

- Click the **Output current document** icon 

The **Output options** window displays

Various settings can be changed prior to generating the **PDF** document but for letter templates the default settings give the best format for the letter.

- Click the **Output to PDF** button

If the letter has only one recipient, the letter will download as a single **PDF** document.

If the letter has more than one recipient (listed in the **Primary recipient(s)** section), a **zip file** will download containing a letter for each recipient. To view the letter or letters click the "form-export" button in the bottom left of the screen.

Once opened letter(s) can be viewed, saved and/or printed as required.

## **Adult Correspondence General**

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The **Adult Correspondence General** workflow step can be used before a case is allocated i.e. to send the pre-allocation letter and relevant information.

This will ensure that the people we support get the information and advice they need as soon as possible.



It can also be used by any Practitioners or Business Support during case activity whenever a letter needs to be sent out.

The workflow step can be left open to allow it to be used if further information and advice is required to be sent out, or it can be finished and a new correspondence step can be added as and where required.

### **Section 1. Person Details**

This section should be reviewed to check the person's name and address details are correct, as these are the details which will automatically display within the **Recipients** section of the letter template.

If required they can be updated by:

- clicking the **Show subject summary** icon  to minimise the step window
- updating the record e.g. person's address
- maximising the step window and clicking the **Refresh current form** icon  to update the information within the form

## Section 2. Correspondence

The checkboxes in this section can be ticked as required to show what information, which booklets/directories etc, need to be provided with any letters being sent out.

Practitioners intending to send the letter themselves should use the checkboxes to indicate what information they have sent.

Where Business Support are being requested to send the letter the checkboxes should be used to indicate what information they need to send with the letter.

- **Date Requested/Completed** = this should be updated once the letter and information has been sent
- **Insert section** button = can be used to record further instances of correspondence being sent out from the same step i.e. where the step is left open. When used the 'Move Section Up' and 'Delete Section' buttons will display
- **Additional information** = this should be used to record specific details of the information that has been send


If you are a practitioner requesting a letter and information is sent out by Business Support, you will need to send a request to ask them to do this:


- Click the **Requests** icon 

The **New Request** window will open.

- Select the request '**Adult Information and advice via Business Support**'
- Use the notes box to record any specific details about the request

- Select the relevant 'Adult Admin' team from the 'Pass to team' dropdown menu to assign to the correct Business Support Team. Only assign to a named member of Business Support if local arrangements are in place or you are working on a restricted record.

The step should be exited using the **Close** icon 

The request will be completed by Business Support and the step Finished (using the **Finish** icon ) once the letter and information has been sent – unless you request the step is left open.

### **Section 3. Next actions**

This section should be recorded by the person finishing the step.

There is only one action available in this step - **Adult Correspondence Completed (NFA)**

You should use the notes box to record details of when/how the letter was sent e.g. "posted today – (date)"