



One Stop Service Tracking

Module 11: Correspondence

Introduction to Module 11: Correspondence

Correspondence refers to the ability to generate pre-defined letters, directed towards customers or other career managers, based upon actions completed within OSST. Because many customers share similar case characteristics, OSST includes a mail merge function. Mail merge allows for creating letters in bulk. OSST also includes the ability to maintain correspondence templates.

Let's begin by defining some common terminology used throughout this module.

Correspondence – system generated letter directed to an individual customer or other career manager

Locally Defined Correspondence – letters generated by OSST that may be defined by local workforce boards as a local standard and uploaded to OSST for generation when a trigger is encountered

Mail Merge – ability to retrieve a listing of customers from OSST based upon common case characteristics and generate the same letter for each customer listed using MSWord

Primary Mailing Address – the address located in the upper portion of the Contact Information page, typically this is the address received from the FLORIDA system via a nightly batch interface

Queue – a temporary holding area for correspondence to be printed at a later time

.rtf file – a rich text file format, OSST correspondence is based upon this common format

State Defined Correspondence – letters generated by OSST that are defined at the state level, considered standard across all local workforce boards

Trigger – a specific action taken by a user of OSST within the system that has associated correspondence

Variable – a piece of information contained in OSST that is used to define case specific information contained in correspondence

What is required in order to fully utilize the correspondence capabilities within OSST?

Your computer must be connected to a printer via a local area network (LAN) or a local printer (direct connection between PC and printer). MSWord is required to support printing and creating correspondence. MExcel is required to download search results when processing large mail merge batches on your PC.

At the end of this module, you will be able to:

- ✓ **Define common terminology associated with OSST correspondence**

- ✓ **Understand correspondence triggers**

- ✓ **View/Print/Delete Queued Letters**

- ✓ **Perform Mail Merge functions**

- ✓ **Understand Administrator's capabilities**

This module covers three functions of correspondence: trigger letters, mail merge and administrator capabilities.

Most of the correspondence generated from OSST occurs when a career manager takes an action on a case that has an associated letter. This is known as invoking a trigger. For example, it is a common practice to send a Welfare Transition customer a Pre-penalty Counseling letter (CF-ES 2290) when pre-penalty counseling is recorded. In OSST when the 'Save' button is clicked while recording pre-penalty counseling, a trigger is invoked to generate the 2290 letter that includes specific information about the customer and the rationale for counseling.

Below is a list of all correspondence included within OSST. The list includes a common name for each letter, the purpose of the letter and the trigger action required to generate the letter.

| | COMMON NAME | TRIGGER |
|-----------|---|---|
| 1 | Agreement for Up-front Diversion Payment/Service (CF-ES 2075 and 2073B) | When diversion is added as a Service to the customer's case |
| 2 | Appointment Letter | When an activity or training is added. Or, when one of the following services is added: Employment Counseling, Education Counseling, Other Counseling |
| 3 | Child Care Application and Authorization (CFFSP 5002) | When Welfare Transition Child Care is added to the customer's case |
| 4 | Hardship Exemption Notification | When adding a 'first hardship date' and 'appointment date' |
| 5 | Hardship Exemption Second Notification | When adding or updating a 'second hardship date' and 'appointment date' |
| 6 | JPR Reminder | No trigger- use Mail Merge functionality |
| 7 | Notice of Child Care Status (CFFSP 5235) | When Welfare Transition Child Care is ended (indicated by inputting an outcome and end date) |
| 8 | Transitional Letter | No trigger- use Mail Merge functionality |
| 9 | Notice of Failure to Participate and Possible Sanction (CF-ES 2290) | When inputting the Pre-Penalty steps on the Sanctions page |
| 10 | Notice of Failure to Demonstrate Satisfactory Compliance (CF-ES 2292) | When requesting a Penalty from the Sanctions page |
| 11 | Request for Medical Verification | When requesting the following deferral reasons: Medical Deferral (less than 90 days), Medical Deferral (90 days or more) |

When the triggers identified above are set to active by an administrator and within the application are encountered, the associated letter is generated. This includes retrieving the letter template (state or locally defined), retrieving variables to populate specific text within the letter (for example, customer's SSN), and combining the template with the variables to produce the final letter. The letter is available for viewing prior to printing or queuing for printing at a later time.

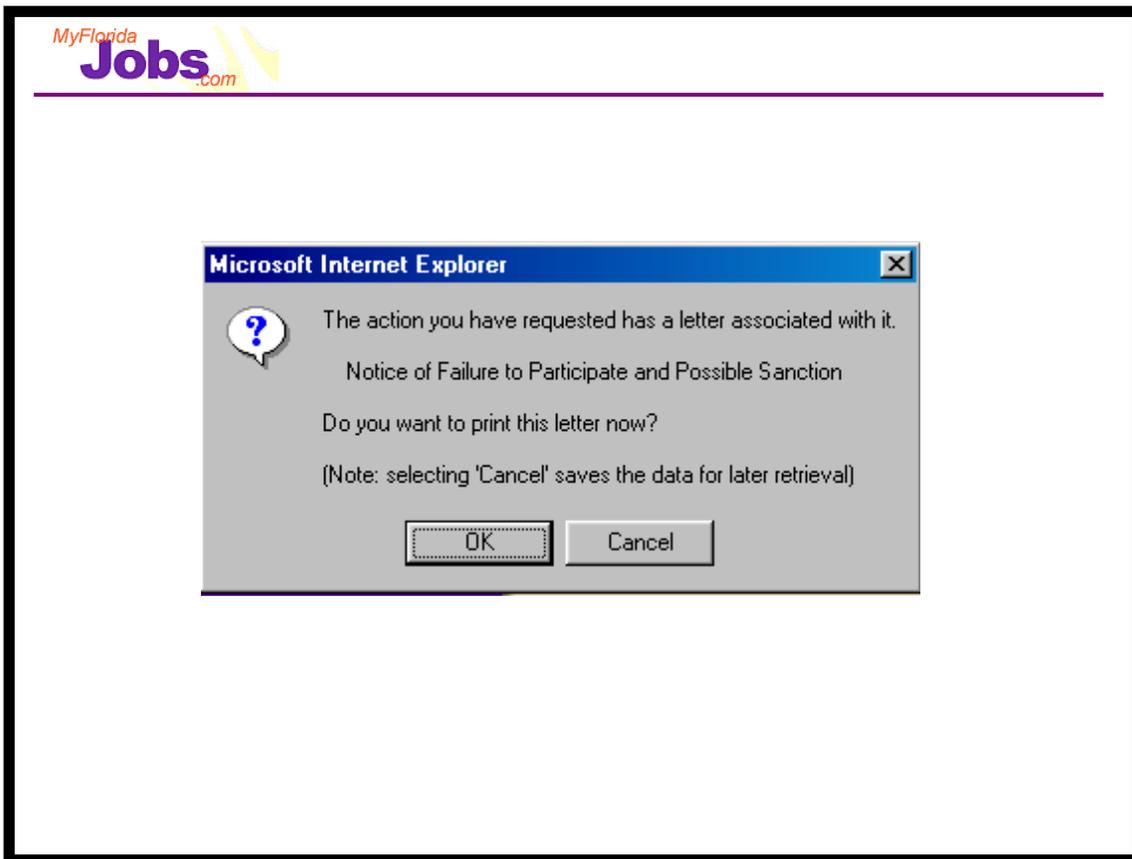
Let's take the pre-penalty example for instance: the pre-penalty counseling is recorded on the Alternative Plan tab of the Case Detail. When the record is saved a trigger is encountered. The trigger instructs OSST to retrieve the CF-ES 2290 and also retrieve several variables contained within OSST like: customer name, SSN, primary address, reason for counseling, etc. These two elements of correspondence are merged together. You are given the option to print preview the letter now or place it in a queue for printing later. When you select 'OK', another browser instance automatically opens with the associated letter in view. At this point you may choose to edit information contained in the letter, this is not a required step.

If you would like to print the letter, use your browser print button. You must be connected to a printer for the letter to print. If you require assistance to connect to a printer, contact your local technical support staff.

When a trigger is encountered and the user decides to print the associated letter, a case note is automatically generated. The case note includes: the name of the letter, the address used as the mailing address, the date and time the letter was printed and the user id of the logged in user. This creates a historical record that a letter was printed, however, it does not mean that the customer received the letter nor does it imply that the letter was ever mailed. The letter is not archived in the system for later retrieval. For future reference, you may wish to print multiple copies to place a duplicate in the case file. This may be useful for hearings, quality assurance audits or as a reminder of actions taken on the case. Another way to archive printed correspondence is to save the document to a local or LAN drive. This can be accomplished by selecting 'Save As' from the File drop down menu within the browser instance containing the letter.

In the example above, there was an option to print or queue the letter. If you choose not to print (view) the letter at that point, it will be added to a list of queued letters, updating the 'Queued Letter' hyperlink available on your OSST Desktop with the number of queued letters that exist.

To print queued letters, simply click the 'Queued Letter' hyperlink on the control panel, select the letter you wish to print or delete.



Letter Generation

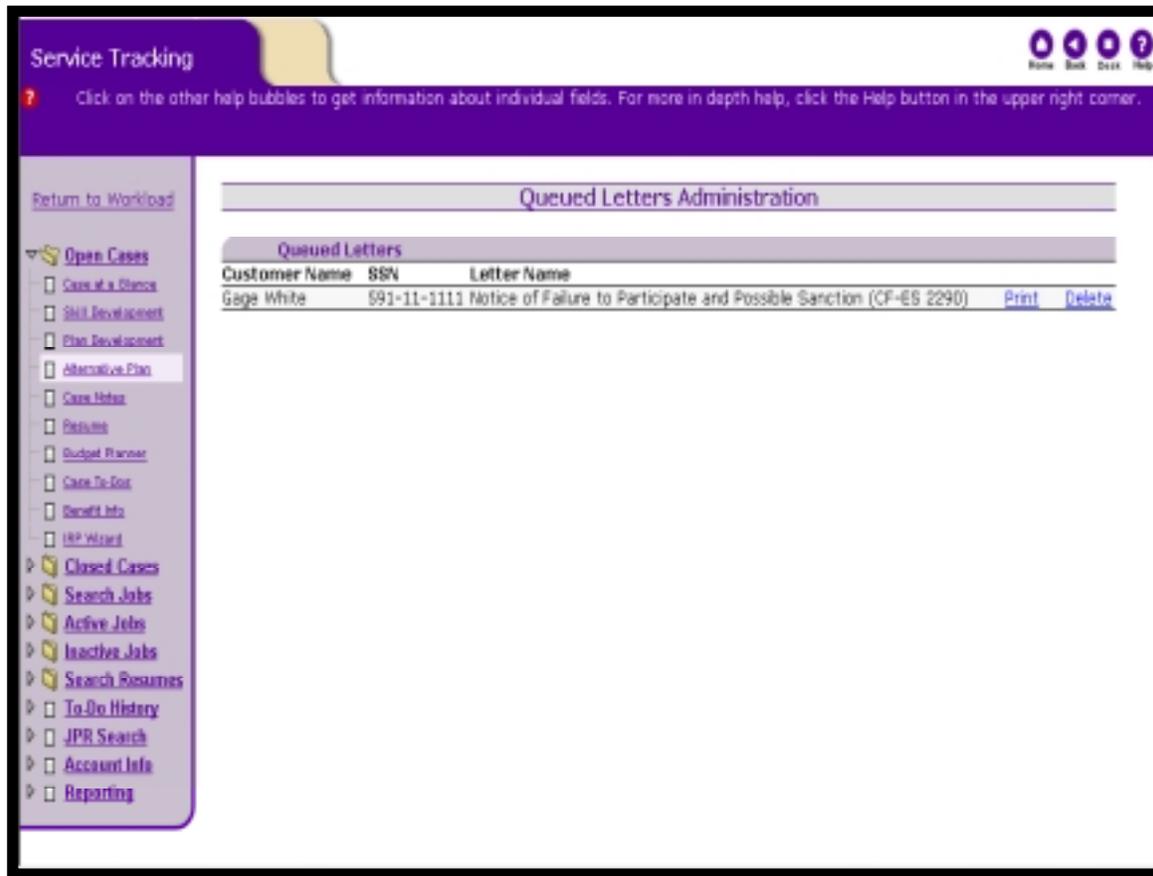
Once you have performed an action that will generate a letter, the pop-up window above is displayed. A message appears informing you that a letter has been generated and asks you if you want to print the letter now.

Associated Procedures:

CLICK 'OK', which opens the letter in another browser instance with all the customer's information already loaded into it. You must use the browser's print button to print out a copy of the letter. Once the letter has been loaded a case note is created stating that the letter has been printed (viewed).

OR

CLICK 'CANCEL' to save the data for printing at a later time, which will add this letter to the queued letters list. A case note will not be created.



I. View/Print/ Queued Letters

The 'Queued Letters' hyperlink is located on your Desktop with the number of queued letters if any letters exist that have been generated, but not printed.

Associated Procedures:

CLICK 'Queued Letters' on the lower left of the desktop (the list of letters is displayed)

CLICK on the letter you would like to view/print

CLICK the browser's 'Print' button to print the displayed letter (the letter is removed from the queued letters list and a case note is created)

II. Delete Queued Letters

The 'Queued Letters' hyperlink is located on your Desktop with the number of queued letters if any letters exist that have been generated, but not printed.

CLICK 'Queued Letters' hyperlink on the Desktop (the list of letters will be displayed)

CLICK 'Delete' next to the letter you would like removed from the queued letters list (the letter is no longer in the list)

Correspondence Mail Merge Function

The Mail Merge option is accessible via the Control Panel Search hyperlink, which provides the ability to send one letter to many people at one time.

In order to find the customers you want a letter mailed to, you must perform a search with search parameters. There are three search types: Service Search, Participant Search and Job Search, which allows you to find customers with similar case characteristics and requiring the same letter. These search pages replace the current functionality of the Cross Reference page in WAGES MIS.

The Service Search, Participant Search and Job Search functions can be used as a caseload management function (i.e., Show me a view of all of my transitional cases), but these search functions also serve as the basis of the Mail Merge capability in OSST.

After entering search parameters in any of the Search screens, OSST will provide the user with a set of search results. The user can view these results, use the results to navigate to a customer's case, or use the results as a base list for a mail merge.

There is a drop down box on the Search Results page that includes all pre-formatted letters included in OSST. From this drop down box, the user can choose the letter that is to be created for the list of customers.