

Merative Social Program Management 8.1

Communications overview

Note

Before using this information and the product it supports, read the information in [Notices on page 17](#)

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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1 Cúram communications overview

Communications are exchanges of information between the organization and participants. These incoming and outgoing exchanges can be in different formats, such as phone calls, emails, or letters. Four categories of communications are supported, recorded, email, pro forma, and Microsoft Word. Communications can be free-form or based on templates.

1.1 General communication features

Communications can be incoming (received by the organization) or outgoing (issued by the organization). All communications have a correspondent and relate to a case or participant. You can maintain communication information for cases and participants. Communication exceptions ensure that only appropriate communication methods are used to contact correspondents.

Correspondents

Individuals and businesses that the organization communicates with are called the correspondents. Types of correspondents include client, employer, agent, and public representative.

Correspondents are selected when you create a communication. They can be selected from previously registered participants or a new correspondent can be added.

The system automatically retrieves communication details for correspondents that were previously registered on the system. For written communications, the system retrieves the correspondent's mailing address; for phone calls, the phone number; for emails, the email address.

When adding a new correspondent, the system automatically creates a representative participant role for the correspondent. The information that is saved for the correspondent is also saved as information for the new representative.

Case and participant communication information

All communications relate to a participant or a case. Communications created in a case automatically relate to that case. This includes communications created from a case participant's list of communications, a case member's list of communications, or from the communication list for the case itself. Communications created from a participant's list of communications relate to that participant.

One of the main differences between case and participant communications is determining on which lists a communication is displayed.

When a participant communication is created, it is only displayed on that participant's list of communications, even if the participant the communication relates to is not the correspondent. For example, if an email is sent to a person's employer, the email communication is only displayed on the person's list of communications and not on the employer's list of communications.

When a case communication is created, it is displayed on the case's list of communications and on the correspondent's two lists of communications. The list of communications for the case participant and the list of communications for the participant outside the case. This is to facilitate searching for case communications outside the case. For example, a person receives a case communication and calls the organization about it. This person would not normally have any other information about the case. In this scenario, the user can search for the person and look at the person's communication list. The user can then locate the relevant case communication as they are the correspondent. If case communications were only displayed within the case, this would not be possible.

Client interactions

All client interactions are stored to provide a more comprehensive overview of a participant's contact with the organization. Client interactions include all the interactions between a participant and the organization.

All communications, payments, and phone calls that are retrieved by a call center, are automatically added to a participant's list of interactions. Interactions are useful because they provide an overview of a participant's contact with the organization. For example, if a participant calls about a specific payment, a user can quickly access the general information about that payment and any communications that relate to it.

Communication exceptions

Communication exceptions are communication methods that should not be used for contacting a participant.

If the correspondent has an active communication exception, the user is not able to use that method to create a communication. For example, if a client has a hardcopy communication exception, then the hardcopy method is not available when you create communications for that client.

1.2 Communication categories

The organization communicates in a number of ways with external individuals and businesses. Four categories of communications are supported: recorded, email, pro forma, and Microsoft Word. Each of these addresses a unique way in which the organization communicates with outside parties.

The email, pro forma, and Microsoft Word categories are used to issue communications. The recorded category is used to record information about communications issued outside the system or received by the organization. The following subsections contain additional information about these categories.

Recorded communications

Recorded communications are used to capture details about communications that are issued outside the system. Typically, these are communications that are received by the organization. For example, when a client returns a completed application form, the user can scan the form and

attach it to the communication as an electronic file. Occasionally, recorded communications are populated automatically as part of a workflow activity.

Organizations can issue communications without using the application to create them. For example, a user may phone a client and follow up this phone conversation with notes. You can enter the details for this phone call in the application, such as the date and time of the phone call and the topics discussed.

All recorded communications have a subject and a direction. The direction indicates whether the communication was issued by the organization or received from an outside party. They also have a communication method, which can be data transfer, email, fax, hardcopy, or phone. Certain information can be entered according to the communication method. For example, the physical location of a hardcopy communication can be recorded so that the original can be retrieved.

Documents that are associated to recorded communications as an attachment can also be integrated with a content management system through the configuration of application properties as part of administration. If an organization chooses to integrate attachments with a content management system, the document is stored in and retrieved from the content management system. Information about the recorded communication can also be stored in the content management system along with the document. For example, the reference number of the case in which the recorded communication was created, the date the communication was sent, and information about the correspondent of the communication can be stored along with the document.

For more information about integrating with a content management system, see the *System Administration Guide* and the *Content Management Interoperability Services Integration Guide*.

Email communications

Email communications are used to send emails to individuals or businesses. Certain information must be entered to ensure the successful issuance of the communication. Most importantly, the user who sends the email and the email recipient must have valid email addresses. Also, the subject and text of the email must be entered. This business requirement provides a small protection against irrelevant or blank emails.

The communication method is always email. This method cannot be used if the email recipient has a communication exception for emails.

To allow for modifications, emails can be saved as drafts and sent at the appropriate time.

Pro forma communications

Pro forma communications are standardized communications that are generated from XSL stylesheets that are saved as pro forma templates. These communications are typically used to send bulk communications by batch processing. In particular, they are used to issue communications that are created as part of specific business processes. For example, registration acknowledgment letters can be created for all new persons who are registered within a defined time period.

Typically, pro forma communications do not require editing by a user. These communications include standard text and variables that are populated by existing data when the communication is created. For example, a registration acknowledgment letter can include standard text about

the registration, and variable information for the registered party, such as a name, address, and registration number.

For pro forma communications that are created automatically by the system as a result of either online or batch processing, the address information is populated with the primary address of the correspondent. If the end date of the primary address of the correspondent passes, the system continues to select the primary address for the pro forma communication. Agencies can choose to implement their pro forma communications to obtain address information for the correspondent in a different manner if needed.

When a pro forma communication is created, the template is merged with the data and the status of the communication is set to 'Sent'. The template version that is used to create the communication is saved to allow the same communication to be reprinted later. For example, if a registration acknowledgment letter is lost in the mail, the user can retrieve the original letter and resend it.

Pro forma communications can also be integrated with a content management system through the configuration of application properties as part of administration. If an organization chooses to integrate pro forma communications with a content management system, the generated communication is saved to the content management system. The communication is then retrieved from the content management system when the communication is reprinted or a user chooses to preview the communication. For more information about integration with a content management system, see the *Cúram Content Management Interoperability Services Integration Guide*.

Pro forma communications can also be created manually by a user. During the manual creation process, the user is presented with templates available to the participant or case. More information about how the templates are filtered is provided in the next chapter.

The communication method for pro forma communications is always hardcopy as these communications are printed and sent. Pro forma communications are not issued to correspondents who have a communication exception set up to ensure that no mail is sent to their address.

Microsoft® Word communications

Microsoft® Word communications are based on a template that is created and maintained in Microsoft® Word.

Associating Microsoft® Word templates with participants or cases

All Microsoft® Word templates are associated with either participants or with cases. When a user creates a Microsoft® Word communication for a participant, the list of templates that is available is filtered so that only those templates that are associated with participants are displayed. The application supports integration with Microsoft® Word, that is, Microsoft® Word is automatically opened and closed by the application, as required.

Note: Microsoft® Word communications are not issued to participants with a communication exception that prevents the participants from receiving mail.

Integrating Microsoft® Word communications with a content management system (CMS)

Microsoft® Word communications can also be integrated with a content management system (CMS) by configuring administration application properties. Where an organization selects to integrate attachments with a CMS, the generated Microsoft® Word document is stored in and retrieved from the CMS. Information about the Microsoft® Word communication can also be stored in the CMS, along with the document. For example, the following information can be stored along with the document:

- The reference number of the case in which the Microsoft® Word communication was created.
- Information about the communication correspondent.

Customizing Microsoft® Word communications

Like pro forma communications, the Microsoft® Word communication is always hardcopy. However, unlike pro forma communications users can customize a Microsoft® Word communication before the user sends the communication. When a user creates a Microsoft® Word communication, the following steps are processed by the application:

1. A Microsoft® Word document is created by retrieving text from a Microsoft® Word template.
2. The Microsoft® Word document is populated with extra information from the application, such as participant information, by using place holders that are defined in the template.

The text that is populated in the document is automatically highlighted. The user can edit existing text or add new text to the document, as required, and then save and send the Microsoft® Word communication to the correspondent.

1.3 Communication templates

Communication templates are used to create standardized communications to send to multiple correspondents. Examples of standard communications include application forms and registration acknowledgment letters. A communication template contains settings, formatting, and styles that are applied to frequently used communications to provide a similar format. Basing a communication on a template eliminates the need to re-create the communication from scratch. Each template can be modified and used repeatedly.

Extensible Stylesheet Language (XSL) templates and Microsoft Word templates are supported for communications. XSL templates are stylesheets that are used to automatically generate pro forma communications. Microsoft Word templates are used to manually create Microsoft Word communications.

XSL templates

XSL templates are used to generate bulk communications automatically, often through batch processing. An XSL template includes standard text that is included in all communications that are generated from the template.

Templates can include variables that refer to existing data, such as a correspondent's name, address, a case number, and an identification number (Social Security Number (SSN) or National Insurance number (NINO)). This data is stored separately from the template. As part of pro forma

communication generation, the variables in the template are populated with the data that is stored in the server.

An XSL stylesheet developer is typically responsible for creating and maintaining and maintenance of these templates, as it requires familiarity with XSL stylesheet development. Business users cannot modify pro forma communications that are created from XSL templates.

Since the system can process pro forma communications without input from a business user, these templates eliminate unnecessary work.

Generating pro forma communications

XSL templates are used to generate pro forma communications from XSL stylesheets. These stylesheets include variables that instruct the system where to insert specific information.

As part of the pro forma generation process, the specific data that is described by the variables is retrieved from the application's server and merged with the XSL stylesheet into an XML file. For example, the correspondent name is merged into the XML document in place of the variable. This merge is the first stage in the pro forma generation process. During the next stage, the application XML Server converts the XML into PDF format. The PDF document then can be downloaded directly from the application by the correspondent, or printed to be mailed to the correspondent.

Template versions for reprinting

Reprinting a pro forma communication restarts the pro forma generation process. When the system reprints a communication, it uses template versions to ensure that the exact same communication is created each time that it is printed.

The template version number is assigned to a communication the first time is printed. The same template version number is then used when the communication is reprinted. For example, a pro forma communication is created from the most recent template version for the registration acknowledgment letter. That same registration acknowledgment letter can be reprinted anytime in the future, regardless of the changes made to the template version.

Templates versions are controlled separately from the pro forma communications. When an XSL template is added to the system, it is saved as the first version of the template. A new version is created each time that a developer checks out the XSL template, changes it, and checks it back in. If a pro forma communication is created from a template, and that template changes in the future, the version number ensures that the correct version is used, rather than the most recent version.

If an organization chooses to integrate pro forma communications with a Content Management System (CMS), the generated PDF document is saved to the CMS and retrieved from the CMS for printing or previewing purposes.

Microsoft® Word templates

Microsoft® Word templates can be used to create a number of communications from the same template. Creating a communication from a Word template is done manually.

A business user can create a communication based on a Microsoft® Word template and then modify the communication, as necessary, before the user sends the communication. For example, if the business user had a phone conversation with the correspondent before the user creates the communication, the user can add details of that conversation to the communication text.

Microsoft® Word templates also can include variable data.

Note: When a user creates a Microsoft® Word communication by using a template, the data that is specific to the correspondent becomes part of the communication itself. For example, where the Microsoft® Word template includes variables for the correspondent's name and address, the correspondent's actual name and address, not the variables, are stored as the communication text.

Another difference between XSL templates and Microsoft® Word templates is how the templates are managed. To create and maintain an XSL template, XSL development knowledge is required. However, Microsoft® Word templates are created and maintained in Microsoft® Word. So, any user with administration privileges and skills in Microsoft® Word skills can maintain Microsoft® Word templates.

Creating Microsoft™ Word communications by using a template

You can use Microsoft™ Word templates to create communications where most of the information is standard. The process might include text that appears in all communications that are created from the template and variables that are populated with data.

When you create a Microsoft™ Word communication, data is retrieved to populate the variables in the template. For example, the actual correspondence name and address values are retrieved and used to populate the corresponding variables in the template. Business users can change all standard text, including the data, while the communication is in draft form. After a Microsoft™ Word communication is marked as sent, you cannot make further changes to the communication.

Note: The data content that is passed to the template to populate the variables is limited to alphanumeric characters only. Any other characters might not be displayed correctly in the rendered document. In particular, the following restricted characters are used to populate the template variables. Do not use the restricted characters in data content that is passed:

- #|/
- |
- >
- New line characters

Filtering available templates

XSL templates and Microsoft® Word templates can be associated with certain information. The association is used to filter the list of templates that are available when users create pro forma and Microsoft® Word communications.

All Microsoft® Word templates are associated with either participants or with cases. When a user creates a Microsoft® Word communication for a participant, the list of templates that is available is filtered so that only those templates that are associated with participants are displayed.

More options are available for filtering XSL templates. For example, XSL templates can be associated with specific participant and product types, such as the person participant type. An XSL template that is associated with the person participant is not available to any other

participant types. To use the XSL template, a user must create a pro forma communication for a person.

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