



Client Letter Delivery Guide

How to prepare letter templates for delivery

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Introduction

For the MHK Letter Automation Tool to auto tag the templates, the letters need to be prepared with unique indicators. Below is a list of the available Mail-Merge tags that can be used to populate data onto a correspondence.

Process

While viewing both this guide and the letter template you wish to prepare, copy a Mail-Merge tag below and paste it onto the letter where you want the MHK platform to auto populate data. See the example below.



<Date>

<Member Full Name>
<Member Address Line 1>
<Member Address Line 2>
<Member Address Line 3>

Dear <Member First Name>,

Start letter here. When you are finished with your letter, convert it to PDF for full quality. The graphic elements are programmed into the header/footer and do not appear in full color/quality until converted to PDF.

If you have two pages, insert a section break at the beginning of the second page. Go into the header footer on the second page and deselect same as previous. Remove the footer from the second page.

<User Full Name>
<User Title>
Phone: <User Phone Number>
Email: <User Email Address>

Continue to next page for a list of available mail-merge tags.

Member Demographic Tags

Mail-Merge Tag	Description/Purpose of Use
<Member Address Line 1>	Prints the Member's 1 st row of their address
<Member Address Line 2>	Prints the Member's 2 nd row of their address
<Member Address Line 3>	Prints the Member's 3 rd row of their address
<Member Age>	Prints the Member's Age in numbers
<Member City>	Prints the Member's City
<Member City State Zip>	Prints the Member's City, State and Zip, together, in one row
<Member Date of Birth>	Prints the Member's Date of Birth
<Member Date of Death>	Prints the Member's Date of Death
<Member Date of Birth Spanish>	Prints the Member's Date of Birth in the Spanish Format
<Member First Name>	Prints the Member's First Name
<Member First Initial>	Prints the Member's First Initial only
<Member Gender>	Prints the Member's Gender
<Member Language>	Prints the Member's language
<Member Last Name>	Prints the Member's Last Name
<Member Spoken Language>	Prints the Member's Spoken Language
<Member Written Language>	Prints the Member's Written Language
<Member Middle Name>	Prints the Member's Middle Name
<Member Name>	Prints the Member's First and Last Name together, in one row
<Member Phone Number>	Prints the Member's telephone number



<Member State>	Prints the Member's State
<Member ID>	Prints the Member's Health Plan ID number
<Member Zip Code>	Prints the Member's Zip Code

User Demographic Tags

Mail-Merge Tag	Description/Purpose of Use
<User Email Address>	Prints the User's e-mail address
<User First Name>	Prints the User's First Name
<User Initials>	Prints the User's First and Last Initials
<User Last Name>	Prints the User's Last Name
<User Full Name>	Prints the User's First and Last Name
<User Phone Number>	Prints the User's Phone Number
<User Phone Ext Number>	Prints the User's Extension Number
<User Title>	Prints the User's Title

Date Tags

Mail-Merge Tag	Description/Purpose of Use
<System Date>	Prints the Date set in the platform
<System Date Plus 14 Days>	Prints the Date set in the platform with 14 days added
<System Date Spanish>	Prints the Date set in the platform in the Spanish format
<System Date and Time>	Prints the Date and Time set in the platform



<System Date and Time With Time Zone>	Prints the Date and set in the platform plus the Time Zone
<Print Next Year>	Prints the following year (YYYY)

