

April 19, 2011

Scheduled Correspondence

Summary:

Placing Coordinators can setup a schedule for automatic generation of correspondence, for example:

- a confirmation letter, to be generated 10 days before placements start, or
- a preceptor thank-you letter, to be generated 5 days after placements end.

Background

The Correspondence module allows users to merge HSPnet data with a document template to create customized letters, forms and notices. See the Quick Reference Guide entitled *Correspondence Module (CORR)* for detailed instructions on this feature.

Scheduled Correspondence is an advanced feature available to educational programs that routinely send certain documents before, during, or after a placement. Each course can be setup with a default schedule, such as a mid-point evaluation reminder to be sent 15 days after the placement starts. The scheduled document then appears in a Correspondence Schedule with a “due date” for when the document should be generated and delivered by a user in the Placing Coordinator (PC) role.

Setup the Course defaults for scheduled correspondence

1. To setup a default correspondence schedule for a course, navigate to **Setup/Lookup** → **Courses** and open the Course Profile

2. View the Correspondence tab for options to schedule document generation.

3. Click Add to schedule a document for delivery.

Course Profile

Course: SPA 532 Advanced Clinical Practicum (SPA532) for UofA / RehabMed
Type: Fieldwork Shifts: 40 of 8 Hrs. Duration: 300 Hrs.

Profile Documents Student PR Selector Correspondence

Template to be Generated Generation Schedule

4. Select a correspondence Template from the dropdown, and define the generation rule by entering number of Days and the Rule to be applied. In this example, the selected template will be scheduled for generation 10 days before the placement end date.

Add new entry

Template to be Generated: Memos and Notices - Student Absence Info

Days: 10 *

Rule: Before End date

5. Click to continue. You can return to this screen to Edit the default course schedule if needed.

Review and Activate the schedule in Cohorts

6. In **Cohorts**, an icon appears if any course has a default schedule for correspondence in the course profile. Click the icon to review and activate the schedule.

Cohort Maintenance				
Term	Course	Start Date	End Date	Course Leader
Fall2011	SLP305	Jul 26/11	Oct 15/11	

- Review the list of scheduled documents that were “inherited” from the Course Profile.
- Click Edit to adjust the default schedule (for this term only), or you can Delete a document if not needed in this term. While editing, select an individual to receive an automatic email reminder when the scheduled correspondence is due.
- Once the schedule is activated, the Correspondence Schedule icon will no longer be faded, indicating the schedule is set.

Correspondence Schedules			
Template to be Generated	Generation Schedule	Due Date	
Placement Letter – Pre-Placement - FL	5 Days Before Start date	Jul 21/11	
Placement Letter – Mid-Placement - FF	10 Days After Start date	Aug 5/11	

Template to be Generated: Memos and Notices - Student Absence Info

Days: 10 *

Rule: Before End date

Send email reminder to: Jones, Mary



Note: The “Due Date” that is displayed above is based on the placement start or end dates as entered in the Cohorts screen for the course in that term. However, when the individual documents are generated for each placement request in the course, the documents will reflect the *actual* dates of the request. For example, in a course with two rotations, the letters will reflect the actual rotation dates for each placement.

Monitor the Correspondence Schedule

- In **Correspondence** → **Schedule**, you can monitor letters and the scheduled date for generation. This date appears as the “Earliest Due Date” in case the course has rotations or if some placements have different start/end dates.
- Earliest Due Date is displayed for each course, based on the actual placement dates of the placements for the course (e.g. Rotation 1 for a course with 2 rotations). If Earliest Due Date is today or in the past, it is displayed in **red**.

- To cancel a scheduled generation (for this cohort and term only), click Delete .


Correspondence Schedule		
Current View		
Due Date: ALL	Program: ALL	Refresh View
Cohort / Term	Template to be Generated	Earliest Due Date
Entry2010 /	Preceptor Recognition - Thanks F	Oct 12/10

- To proceed with generating documents for the selected term and course, click the Template icon to proceed.

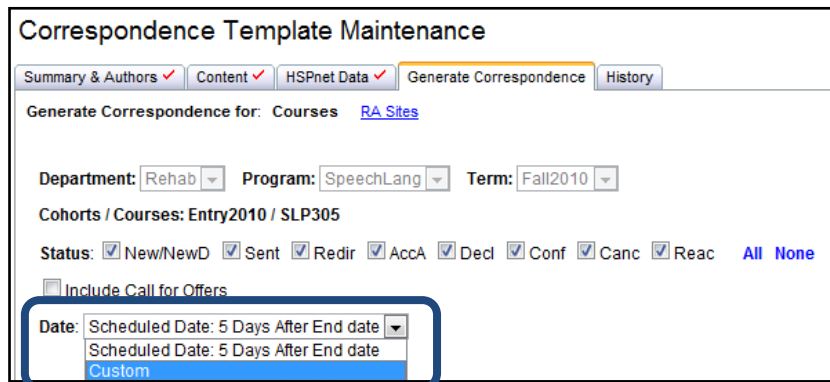


TIP: Change the Current View filters to focus on Courses from one or all of your allowed Programs, or scheduled documents by due date (due today, overdue, upcoming, etc.)

Generating correspondence and monitoring documents to be delivered

9. The Template icon  opens the Correspondence Template Maintenance window (from the CORR module) with familiar options for generating based on placement status, etc.

10. The screen displays a dropdown to allow changes to the generation rule previously selected (such as “10 days after start date”). If one or more letters should be sent on a different date (e.g. to send letters earlier for students in out-of-province locations) change the dropdown to Custom” to allow entry of a different date.



11. When all options are selected, click [Create Recipient List](#) to generate a list of placements for this term and course. De-select any placements that should not have this document generated.

12. As each document is generated it will be added to the Scheduled Correspondence Queue; click this link to view the queued documents awaiting delivery.

Correspondence Schedule

[Scheduled Correspondence Queue](#)

13. A Due Date for delivery is displayed for each document, based on the actual dates of the placement. If Due Date is today or in the past, it is displayed in red.



NOTE: The Queue is defaulted to documents generated by the current user. Change the filter to view documents awaiting delivery for another user in your department. As with the regular Report Queue, you are permitted to view and deliver documents for another user, but not to delete them.

Things to Remember

- The Scheduled Correspondence Queue holds documents that are generated for scheduled correspondence only; all other reports and non-scheduled correspondence are held in the regular Report Queue.
- Documents will be held in the Scheduled Correspondence Queue for 50 days.
- An email reminder will be sent:
 - To the PC designated in Cohorts to receive notices when scheduled correspondence is due to be generated; and
 - To the user who generated the correspondence when due, when generated correspondence is due to be delivered.

If you have suggestions or feedback, or need assistance with scheduled correspondence, please let us know.

HSPnet Team
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