Reference Guide

Early Years

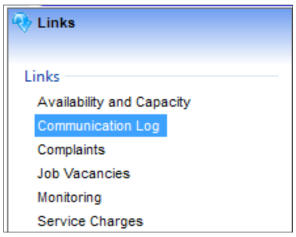
Logging a New Communication

Logging a New Communication

A new communication can be logged for a provider or a service.

To log a new communication for a provider:

1. Search for a provider via **Focus | Early Years | Search for a Provider**.
2. Select a provider to display the **Maintain Provider** page.
3. Select the **Communication Log** link on the **Links** panel to display the **Communication Log Filter** page.
4. Click the **New** button.



To log a new communication for a service:

1. Search for a service via **Focus | Early Years | Search Service Provision**.
2. Select a service to display the **Maintain Service Provision** page.
3. Select the **Communication Log** link on the **Links** panel to display the **Communication Log Filter** page.
4. Click the **New** button.

Logging a New Email

1. On the **Basic Detail** panel, select **Email** from the **Type** drop-down.
2. Select a **Direction** from the drop-down.
3. Click the **Continue** button.
4. On the **Communication Summary** panel:

   a. Select **Log Date** from the drop-down calendar.

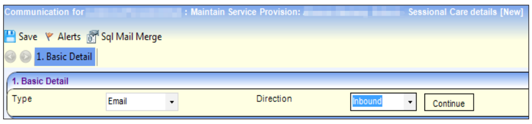
   b. Enter **Log Time.**

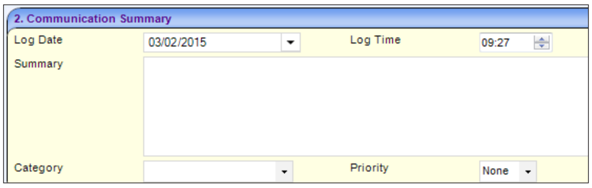
   c. Enter a **Summary**.

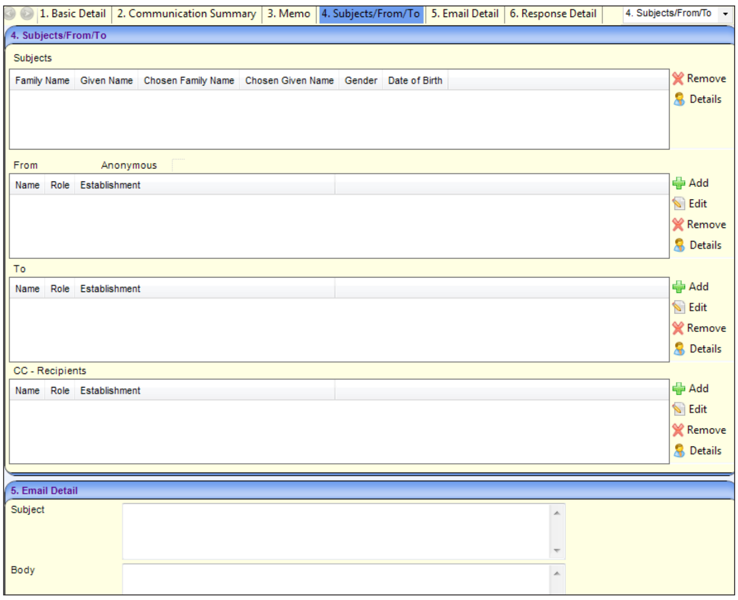
   d. If required, select a **Category** from the drop-down list (Table ID: 0427).

   e. If required, select a **Priority** from the drop-down.
5. If required, enter a **Memo.**
6. On the **Subjects/From/To** panel, click the **Add** button to display the **Person Enquiry.**
7. On the **Email Detail** panel, enter the **Subject** and **Body** of the email.

   Proceed to *Selecting a Person*.







Reference Guide

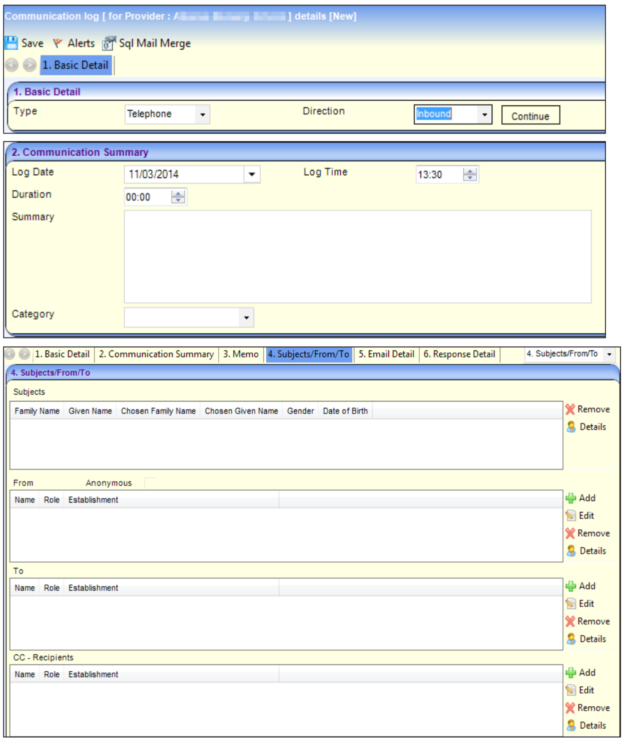
Early Years

Logging a New Communication

Logging a New Telephone Call

1. On the **Basic Detail** panel, select **Telephone** from the **Type** drop-down.
2. Select a **Direction** from the drop-down.
3. Click the **Continue** button.
4. On the **Communication Summary** panel:
    a. Select **Log Date** from the drop-down calendar.
    b. Enter **Log Time**.
    c. Enter **Duration**.
    d. Enter a **Summary.**
    e. Select a **Category** from the drop-down list (Table ID: 0427).
5. If required, Enter a **Memo**.
6. On the **Subjects/From/To** panel, click the **Add** button to display the **Person Enquiry**.

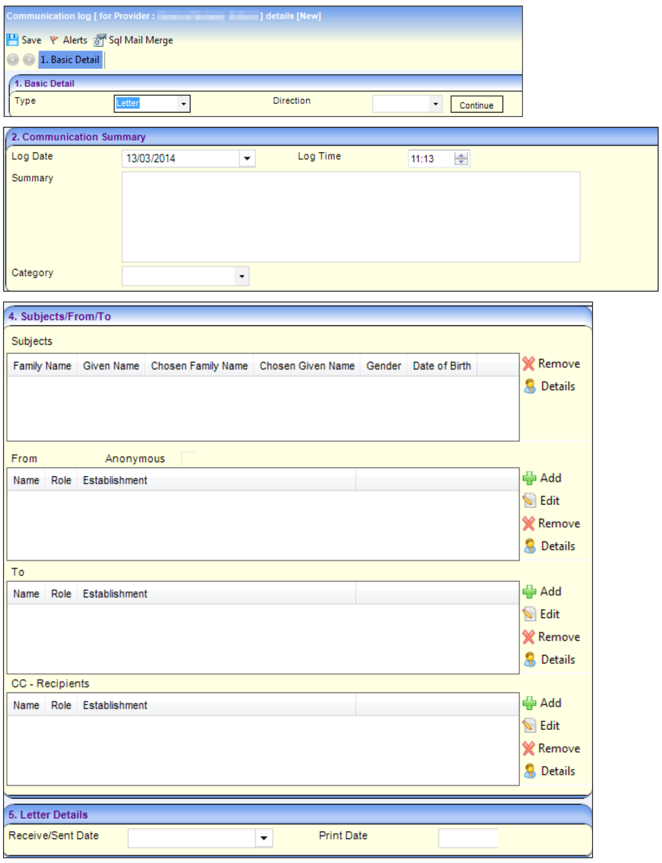
    Proceed to *Selecting a Person*.



Logging a New Letter or Fax

1. On the **Basic Detail** panel, select **Letter** or **Fax** from the **Type** drop-down.
2. Select a **Direction** from the drop-down.
3. Click the **Continue** button.
4. On the **Communication Summary** panel:
    a. Select **Log Date** from the drop-down calendar.
    b. Enter **Log Time**.
    c. Enter a **Summary.**
    d. Select a **Category** from the drop-down list (Table ID: 0427).
5. If required, enter a **Memo**.
6. On the **Subjects/From/To** panel, click the **Add** button to display the **Person Enquiry**.
7. On the **Letter Details** panel, select a **Receive/Sent Date** and a **Print Date**, if required.

    Proceed to *Selecting a Person*.



Reference Guide

Early Years

Logging a New Communication

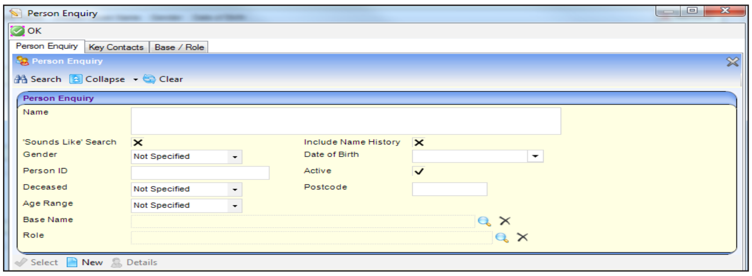
Selecting a Person

Clicking the **Add** button on the **Subjects/From/To** panel displays the **Person Enquiry** dialog to select a **From**, **To** or **CC-Recipient** for the communication. A person or role is selected using the **Person Enquiry** page or the **Base/Role** page.

NOTE: For Early Years there is no **Subject** and **Key Contacts** are not used.

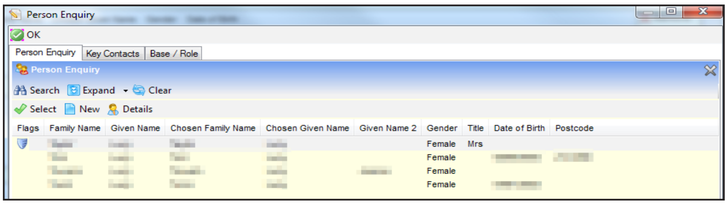
To select a person using the **Person Enquiry** page,

1. Enter search criteria.
2. Click the **Search** button to display a list of matching people.



3. Select the required person in the list and click the **Select** button.
4. Click the **OK** button.

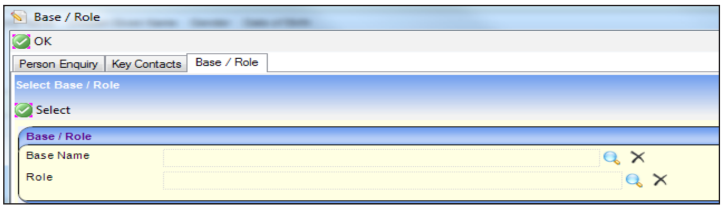
   If required, click the **New** button to add new person.



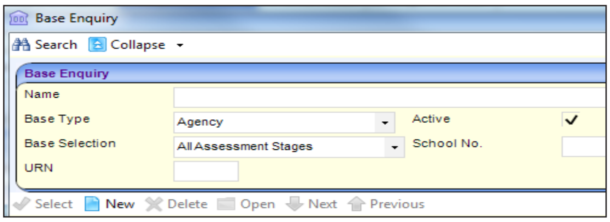
Selecting a Base and Role

To select a person using the **Base/Role** page:

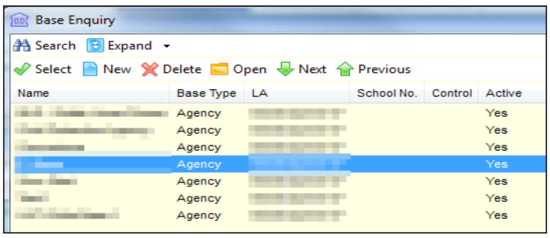
1. Click the **Base Name** browse to display the **Base Enquiry** screen.



2. On the **Base Enquiry** screen, enter search criteria, if required.
3. Click the **Search** button to display a list of matching bases.



4. Select the required base and click the **Select** button.



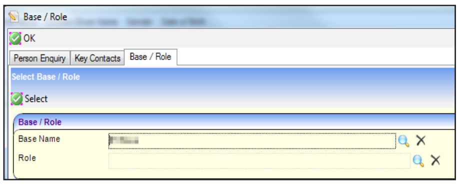
Reference Guide

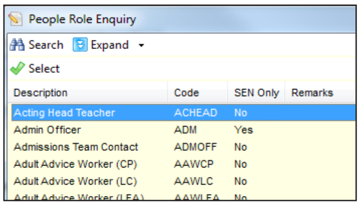
Early Years

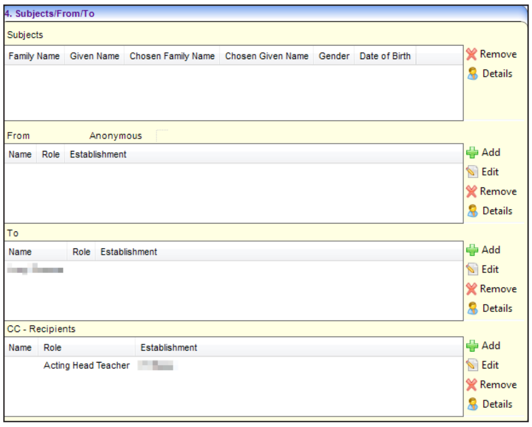
Logging a New Communication

Selecting a Base and Role (continued)

5. Click the **Role** browse button to display the **People Role Enquiry** screen.
6. Enter search criteria, if required.
7. Click the **Search** button to display matching roles.
8. Select the required role and click the **Select** button to display the **Base/ Role** screen.
9. Click the **OK** button to display the **Subjects/From/To** panel.



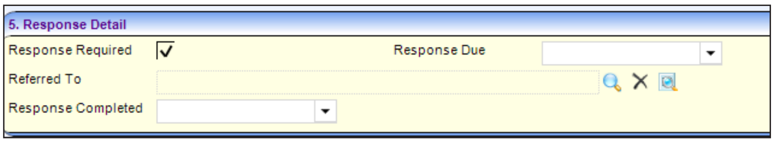




Logging Response Requirements

If a response is required for the communication:

1. Select the **Response Required** check box to display a tick.
2. If required, select a **Response Due** date from the drop-down calendar.
3. If required, click the browse button to display the **Person Enquiry** and select a **Referred To** person.



After completing the required details, click the **Save** button.

Related Reference Guides:

- **EY_Maintain Service Provision Details and Contacts**
- **EY_Displaying Provider Details**
- **Communication_Log_Follow_Up**

CAPITA

Capita One. Tel: 01234 838080. Email: info@capita-one.co.uk. Web: www.capita-one.co.uk.

For more detailed instructions refer to the online help file or handbook. You can contact the Service Desk via My Account.
This guide is based on the version of the software (Spring 2015, 3.56) in use at the time of publication.