



Communication Log

Log a New Communication

Link: **Communication Log** from an Involvement, a Person or a Service Provider. Alternatively, click **Generate Correspondence** button when viewing a Timeline.

Note: for v4 Governors Communication Log refer to RG_OL_Governors_Record Correspondence. For Early Years, refer to EY_Log_New Communication.

1. Search for existing Communications. **To Date** (system date) and **From Date** defaults according to parameter set in v3 LA Defaults (initial default 1 week) Summary of matching entries listed beneath

2. Click the New button to log a new Communication

3. Select Type and Direction. Click **Continue**

4. Log Date and Log Time are automatically completed. Enter a **Summary** of this Communication.

5. Memo is optional



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4. Subjects/From/To

Subjects

Family Name	Given Name	Chosen Family Name	Chosen Given Name	Gender	Date of Birth
:					

6. Subject defaults to either Subject of Involvement, Person selected using **Person Enquiry** or blank if communication is for a Service Provider

From Anonymous

Name	Role	Establishment
Cl		

7. From: Name, Role and Establishment of the Initiator. For Outbound this will default to the Caseworker assigned or person linked to the user logged on. Click **Add** to select from **Person Enquiry/Key Contacts/BaseRole**

To

Name	Role	Establishment
f		

8. To: Name, Role and Establishment of the Recipient. For Inbound this will default to the Caseworker assigned or person linked to the user logged on. Click **Add** to select from **Person Enquiry/Key Contacts/BaseRole**

CC - Recipients

Name	Role	Establishment

Click the **Add** button to open **Person Enquiry/Key Contacts**.

Click the **Edit** button to edit **Role** and **Establishment**.

Click the **Details** button to view **Person Details**

9. The **Letter Details** panel is only visible if **Communication Type** is **Letter** or **Fax**. Letters that have been generated from a Timeline are pre-populated with:

- Response Required** indicator
- Receive/Sent Date** (defaults to the date the letter was generated)
- Print Date** (defaults to the date the letter was generated (for auto generation) or the date the letter was printed (for manual generation))

5. Letter Details

Receive/Sent Date: 05/01/2012 Letter Date: 03/01/2012

Print Date: 06/01/2012 Letter Reference: ABC/123987

6. Response Detail

Response Required: Response Due: 02/02/2012

Referred To: ⓘ ✕ 📎

Response Completed:

Referred To:
If required, click browse button to open **Person Enquiry**.

5. Email Detail

Subject

Body

10. Email Detail panel only available if **Communication Type** is **Email**. **Subject** and **Body** are free text to be completed as required



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Subjects/From/To:

Clicking the **Add** button displays the **Person Enquiry** to select a new **Subject, Initiator, Recipient** or **CC** for the communication. You can select using **Person Enquiry, Key Contacts** or **Base/Role**. NB. For Early Years there is no **Subject** and no **Key Contacts**.

Person Enquiry tab:
Click the **Search** button.
Highlight the required person.
Click the **OK** button

Key Contacts tab:
Select the check box against required person and click the **OK** button.

11. Click the **Save** button.

- Related Reference Guides:**
- Log Follow-Up Communication
 - OL_Governors_Record Correspondence
 - OL_Governors_Correspondence_Follow-up
 - EY_Log New Communication