

SP TEMPLATES – HOW TO GUIDE

CREATING NOTE TEMPLATES

Co-ordinators have the option to create templates for standard notes and e-contact type notes sent by SMS and/or email. SMS Templates are restricted to 160 characters.

STEPS

1. Go to the **Admin** Page
2. Go to the **Templates** Tab
3. Select **New Template**
4. Enter a **Template Name, Version, Description**.
5. Select a **document type** from the options available – e.g. Static, Email, SMS.
6. Select either a workgroup or make available to all workgroups in the cluster.
7. Add the content of the **template**. This content will appear if selected from the drop-down menu in an e-contact note type. User selecting SMS document type will be prevented from entering more than 160 characters.
8. Select **Save**.

The screenshot shows the 'Infocchange' Admin interface. The left sidebar has a menu with 'Home', 'Persons', 'Reports', and 'Admin'. The 'Admin' section is expanded, showing 'ACME Support Service' and 'Police Referrals'. The 'Templates' tab is selected, displaying a table of existing templates. A 'New Template' button is visible. The main form on the right is titled 'New Template' and contains fields for 'Template Name', 'Version', 'Description', 'Document Type', 'Workgroup', and 'Template' content. Red callout boxes with numbers 1 through 8 point to specific elements: 1. 'Admin' menu item; 2. 'Templates' tab; 3. 'New Template' button; 4. 'Template Name' field; 5. 'Document Type' dropdown menu; 6. 'Workgroup' dropdown menu; 7. 'Template' content text area; 8. 'Save' button.

Template	Version	Type	Start Date
Email Please contact the service	1.0		26/08/2016
Please contact us	1.0		26/08/2016
SMS Please call Acme	1.0		23/08/2016

Template Name: SMS Please call Acme
 Version: 1.0
 Description: To be used when asking clients or potential clients to contact our service.
 Document Type: Contact - SMS
 Workgroup: Available to all workgroups in Cluster
 Template: Pls call Acme Support Service on 0444-4444
 Start Date: 23/08/2016
 End Date:
 Last update: 26/08/2016 10:11:16 AEST
 Save Update

TEMPLATE EXAMPLES

Service Providers are encouraged to create templates that are tailored to the support offered and consideration be given to all wording used in templates where safety concerns of clients are paramount.

SMS

SMS 1 – SMS sent to client prior to calling

- We received a police referral for you and will be calling from a blocked/private number.

OR

- As a result of a Police Referral we will attempt to contact you from a blocked/private number in 5mins/today?

SMS 2 – SMS sent to client after 1st contact attempt is unsuccessful

- We were unable to reach you today as a result of a Police Referral. We will try again or you can contact us on 4444 5555.

SMS 3 – SMS sent to client after 3 unsuccessful contact attempts

- We have been unsuccessful in contacting you as a result of a Police Referral. Please phone us on 4444 5555 for support.

EMAIL

Including opening hours of service or adding your website link to the email template might increase contact opportunities for referred clients.

Dear #client_firstname#

We are confirming that a referral (#tracking_id# refers) from the Queensland Police Service has been received by #referral_from_organisationname#

We will attempt to contact you shortly. In the meantime, if you would like to contact us directly please call us on 07 4444 5555.

Thank you

Organisation Name