
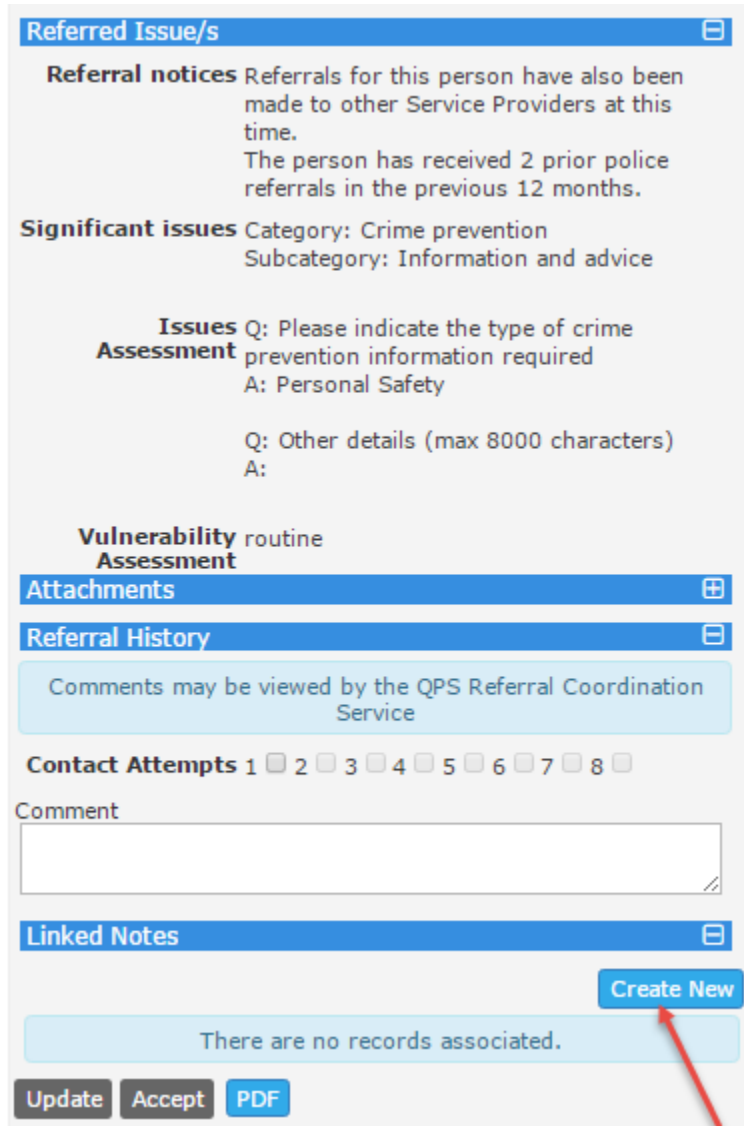


SENDING CLIENTS EMAILS / SMS DIRECTLY FROM THE REFERRAL

Once a client has been added into SRS database, the service provider can send an SMS or email directly from the Referral (viewed in the **Home** page). A message may be freetext or pre-designed and saved as a Template. If sending via SMS, there is a maximum character allowance of 160.

1. From the person's referral go to the **Linked Notes** section at the bottom of the Referral. Click on the plus symbol  and a **Create New** option will appear:



The screenshot shows a web interface for a referral. At the top is a blue header 'Referred Issue/s' with a close icon. Below it are sections for 'Referral notices', 'Significant issues', and 'Issues Assessment'. The 'Issues Assessment' section has a question 'Please indicate the type of crime prevention information required' and an answer 'Personal Safety'. Below that is a 'Vulnerability routine Assessment' section. A blue bar labeled 'Attachments' has a plus icon. Below that is a blue bar labeled 'Referral History' with a close icon. A light blue box contains the text 'Comments may be viewed by the QPS Referral Coordination Service'. Below that is a 'Contact Attempts' section with radio buttons for 1 through 8. A 'Comment' text area is below that. At the bottom is a blue bar labeled 'Linked Notes' with a close icon. A blue button labeled 'Create New' is positioned to the right of the 'Linked Notes' bar, with a red arrow pointing to it. Below the 'Create New' button is a light blue box with the text 'There are no records associated.'. At the very bottom are three buttons: 'Update', 'Accept', and 'PDF'.

2. Select **Create New** to open the Note template.
3. Select **Contact Type** from the drop down menu
4. If **Contact Type**, SMS Email is selected the option to send via either Email or SMS is available.
5. Tick the Send as SMS or Email Box.
6. Select the appropriate presaved Template if appropriate OR create message in **Notes** into the notes field.

7. Add contact length if appropriate/
8. Select **Send**.

The screenshot shows the 'Edit Note Details' form with the following elements and callouts:

- 3**: Date field set to 26/08/2016.
- 4**: Contact type dropdown menu set to SMS / Email.
- 5**: Send as checkboxes, with Email selected.
- 6**: Use template dropdown menu set to 'Email Please contact the service'. A callout box points to this menu with the text: 'Select Template from the Use Template drop down menu'.
- 7**: Contact length input field set to 30.
- 8**: Send button.

Additional callouts include:

- A yellow warning box: 'After sending, this record cannot be edited.'
- A callout box pointing to the Notes field: 'Notes field is pre-populated with template'.

The Notes field contains the text: 'Can you please contact us to arrange your next appointment'.

At the bottom, there are input fields for 'Contact length' (30), 'Contact' (15), and 'Case Work' (), followed by 'Travel' and 'mins'. Below these is the text 'May be edited to 09/09/2016' and 'Last update'.

- Templates can be created within SRS which can be used when selecting SMS/Email or standard note types. To create template, go to ADMIN – TEMPLATES or see **Section 14 of How To Guide**. If sending via SMS, there is a maximum character allowance of 160.
- If there is no **econtact** recorded in the client details section, a message will appear as follows – ‘To send reminders, set a mobile phone number or email address as preferred option for text communication in Person Details’. For details in updating Person Details / econtacts, please refer to the How To Guide.