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| **SUBJECT:** WellSky PCOC Advisor Letter Generation Policy | **DATE:** 3/17/2022 |
| **TARGET AUDIENCE:** MyOptionsRI Advisors | **REFERENCE NUMBER:** 01 |
| **TYPE:  NEW  REVISIONS:** | **REVISION DATE: N/A** |
| **PURPOSE:** Provide guidance to MyOptions Advisors regarding generation of client letters, storage, and sending via mail and/or email | |
| **CHANGES SINCE LAST REVISION:**  **DOCUMENTS/ASSOCIATED RESOURCES:**  **ATTACHMENTS:** N/A | |

**Overview**: The MyOptions Advisors should perform consistently when generating Word Merge within WellSky HS. To do so please follow these patterns when working in Word Merge. These steps are part of the WellSky training guide. Generation of the PCOC Action Plan is used as the example (Letter Sent After PCOC and all the other letters are in the main Call screen):

1. While in the client record in Consumer Chapter, select the client’s Person Centered Options Plan
2. Complete the Plan
3. Select Word Merge and select Action Plan language intended (English is the standard letter) as an example.
4. Open Document and clean (i.e., removal of blank boxes, extraneous pages, repair signature if needed)
   1. Note that the steps below will save to the work to the local file system and to the WellSky HS record:
      1. File and save as the document locally, to your agency’s agreed upon directory structure and location. This location requires HIPAA compliancy. Save the file with client recognized name in file name structure and date
      2. Upload and Save to Note (note that “Save to Note” only will not pull in your changes into the note. Always use Upload and Save the Note.
5. Link letter to the consumer
6. Change to Complete
7. In Show Consumer check the box (must check)

Policy Note 1: The Letter, Action Plan, and related flyers will be sent to the client. If email was agreed upon with the client, also send hard copy letter with all additional documents. If email is not used by client, hard copy letter with all additional documents only.

* + If email is used, create the email and attach all pieces. Letter, PCOC Action Plan and materials. Remember to also physically mail.
  + Method of physical mailing depends on the agency’s practices
    - The Advisor might be physically mailing. If so, print all materials and mail.
    - The Advisor may have a central mailing function as part of their agency. If so follow the business process for mailing of that agency. This could include emailing the central mailing function with all pieces to be mailed and requesting the mailing occur.

Policy Note 2: Follow Translation Policy for all documentation going to Clients/Representatives

Policy Note 3: All Flyers should be downloaded from the EOHHS PCOC Advisor Page <https://eohhs.ri.gov/partners/pcoc> and included in the mailings as appropriate.