

# Create Letter Content – Macro Basics

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Before beginning:

- ✓ Open ACO

The Letter Management option lets you create form letter templates from which users can generate letters customized for individual surveys, complaints/incidents, provider types, and recipients. A form letter template contains standard text and macros (merge codes), which serve as placeholders for information about the specific survey, intake, or provider.

Creation of a letter template is a two-part process. You specify letter attributes, e.g., letter type and description, in the Letter Desc (Description) window. Then you use the ASPEN word processor (window title is Edit Letter Text) to enter letter content.

## 1 Define the letter

- From the System menu, select **Letter Management**.
- In the Letters window, click **New...**
- In the Letter Desc window, enter a Description of the letter.

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**Note:** The template ID is provided by the system.

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**Tip:** To group similar letters together, use the Description field to provide descriptive phrases that sort together alphabetically. You could, for example, assign prefixes that will group and list the templates in the desired order.

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- Select the Letter Type **Complaint**.
- To assign facility types to the letter, click the **Facility Type** tab, select the **Letter appears ...** checkbox, then select the facility types for which the letter will be available.
- Click **OK** to open the ASPEN word processor (window title is Edit Letter Text).

## 2 Add text

- You can enter as much text as you need. Edit Letter Text includes a variety of text formatting features.
  - To insert headers and footers, from the View menu, select **Headers and Footers**.
  - To add tables, use the Table menu options.
  - To include your agency logo, from the Insert menu, select **Image**, then navigate to and select the appropriate image file.

## 3 Working with macros

You can insert macros from a predefined list into letter templates. The macros function like mail merge codes in word processors. Each macro (merge code) references information stored in ASPEN databases.

When letters are generated from templates, the macros are replaced with the referenced information. If the information does not exist in an ASPEN database, the macro name or NO DATA (Enforcement macros only) is displayed in generated letters.

### ➤ Survey Macros

Survey macros can be inserted into any letter, but return data only if the letter is associated with a specific survey.

- In ACO, you can do this by generating the letter from the survey (right-click the survey in the tree).
- In AEM, letters generated from templates with Requires Specific Visit Information enabled in the Letter Desc window allow you to choose the appropriate survey when you create the letter.
- In ACTS, letters generated from an intake will use the survey that is linked to the intake.

### ➤ Enforcement Macros

AEM macros follow these conventions:

- Enforcement macros that print dates use the long date format (Month Date, Year): January 1, 2015.
- Enforcement macros that list deficiencies show the tag number, scope/severity, CFR number/regulatory reference, and tag title:
  - F0160 – S/S: A – 483.10(c)(6) – Protection Of Resident Funds
  - F0221 – S/S: D – 483.13(a) – Physical Restraints
- Enforcement macros that print dollar amounts include the decimal and cents: \$100.00.

### ➤ Complaint Macros

See the Complaint Letter Macros scenario.

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#### 4 Introduce redaction macros

There are two simple but effective macros that use the redaction process, ALL - Allegation Findings and ALL - Allegation Text, each with and without the redaction option. I am going to discuss the Allegation Findings macro...

ALL - Allegation Findings[with redact]

- Inserts text entered in the Findings section of each allegation's text area, with redacted text replaced by (###).

ALL - Allegation Findings[without redact]

- Inserts text entered in the Findings section of each allegation's text area, including redacted text. Redaction brackets are removed.

See the Complaint Letter Macros scenario.

- Click **Save & Exit** to save the text and formatting and return to the Letters window.