



**Model Tribal System**

Designed By Tribes, For Tribes

# **Quick Reference Guide**

## ***Document Generation***

Version 1.6

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**Department of Health and Human Services  
Administration for Children and Families  
Office of Child Support Enforcement**

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REVISION HISTORY			
Version	Date	Description of Change	Approval
1.0	11/19/2013	Original Document -Based on MTS181	Joseph Bodmer, Director, Division of State and Tribal Systems
1.1 – 1.3	1/13/2013	Format Changes	TM
1.4-1.6	05/15/2014	Quality Assurance	CP

## 1 Overview of Document Generation

This quick guide is designed to be a desk reference for financial workers who are responsible for the financial processing of payments on the Model Tribal System (MTS). The contents are a high-level overview of the more detailed instructions which can be found in the System Administrator's Manual and the Caseworker's Manual.

Workers can create case documents on the MTS by selecting templates from the Document Index. The MTS automatically adds the participant and case data to the templates. The templates are maintained in the System Administration module. New templates can be created and are automatically added to the Document Index. The MTS also has over a hundred pre-defined templates that can be used or modified.

There are 4 main steps in creating a new document template.

As System Administrator:

Step 1 – Create a template

Step 2 – Modify the contents of a template

Step 3 – Preview and save the template

As a caseworker or financial worker:

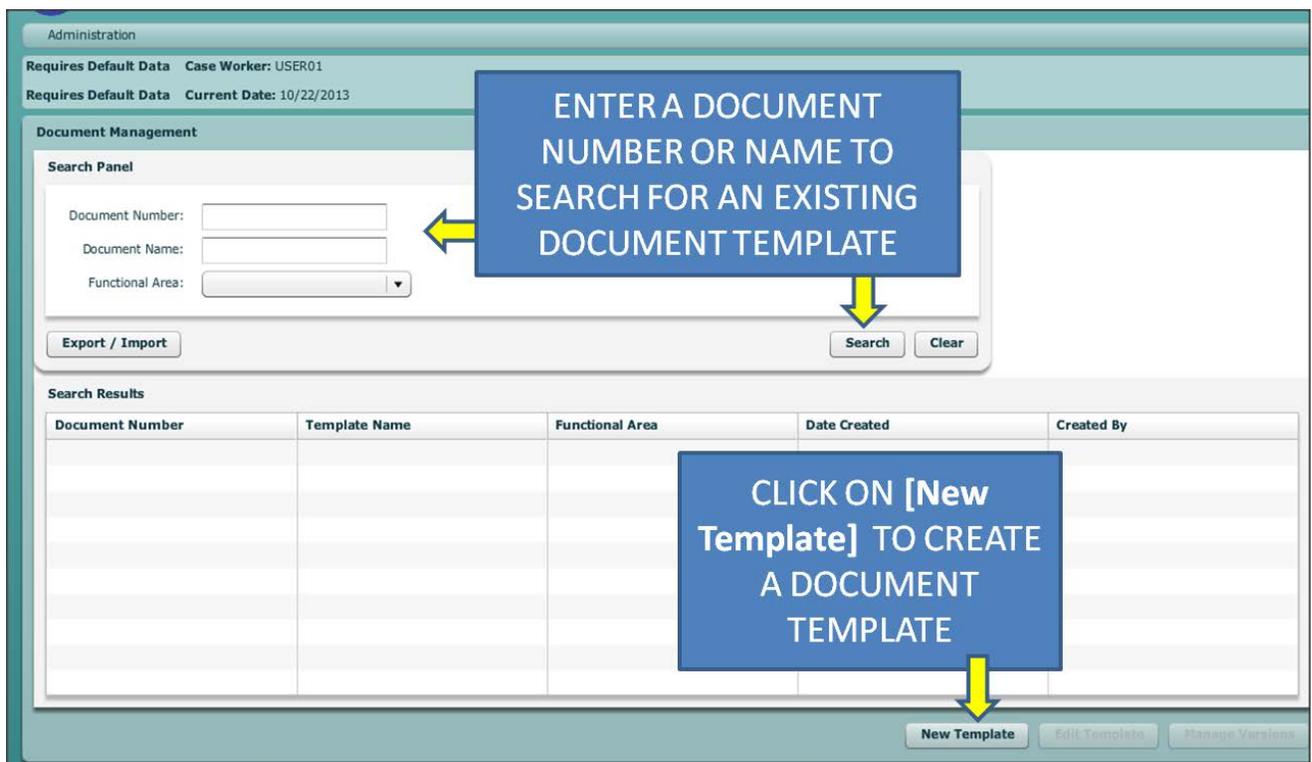
Step 4 – Test the template by creating a document for a selected case

## Step 1 – Create a Template

Login as a System Administrator and select Document Options from the Administration menu to open the Document Management screen.



1. Create a new template or search for an existing one.



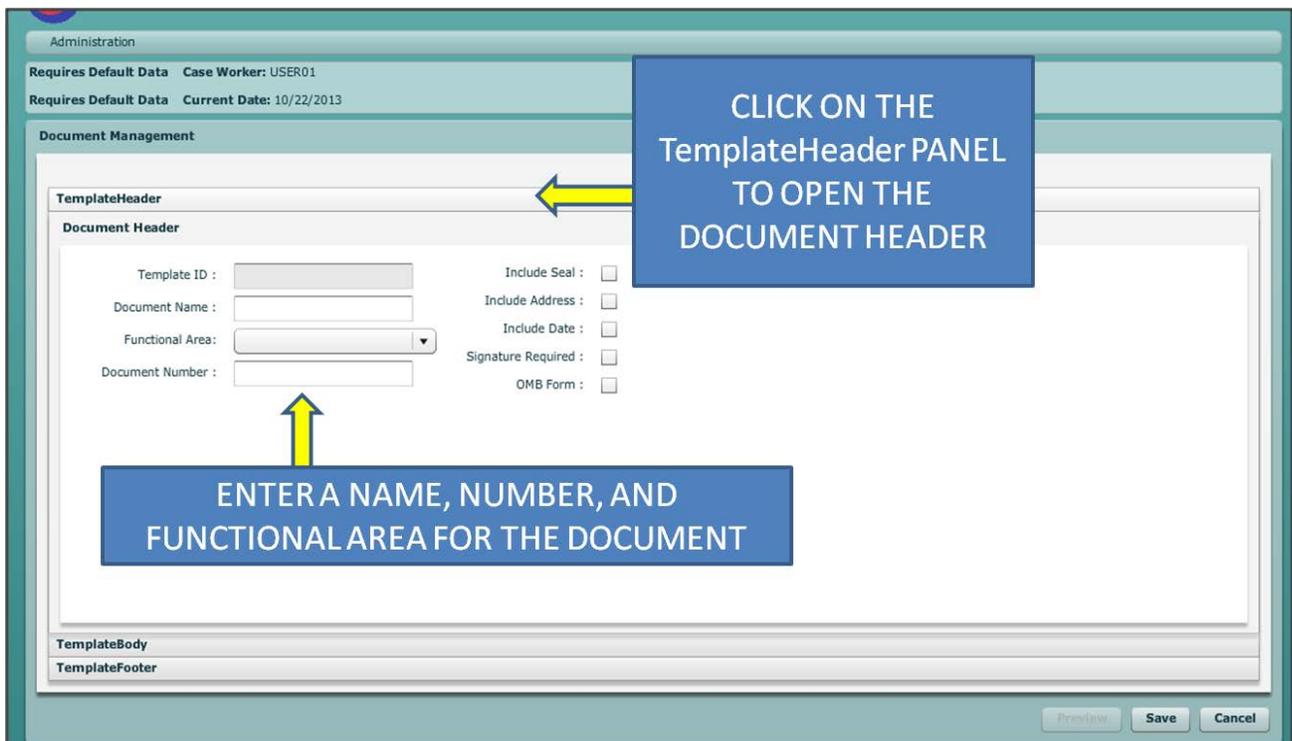
2. Clicking [**New Template**] will open a template which has three separate panels for the header, body and footer of the template. Clicking [**Edit Template**] will open the selected existing template for editing.

## Step 2 – Modify the Contents of a Template

Open each of the three panels to select or enter the contents of the document.

### 1. TemplateHeader

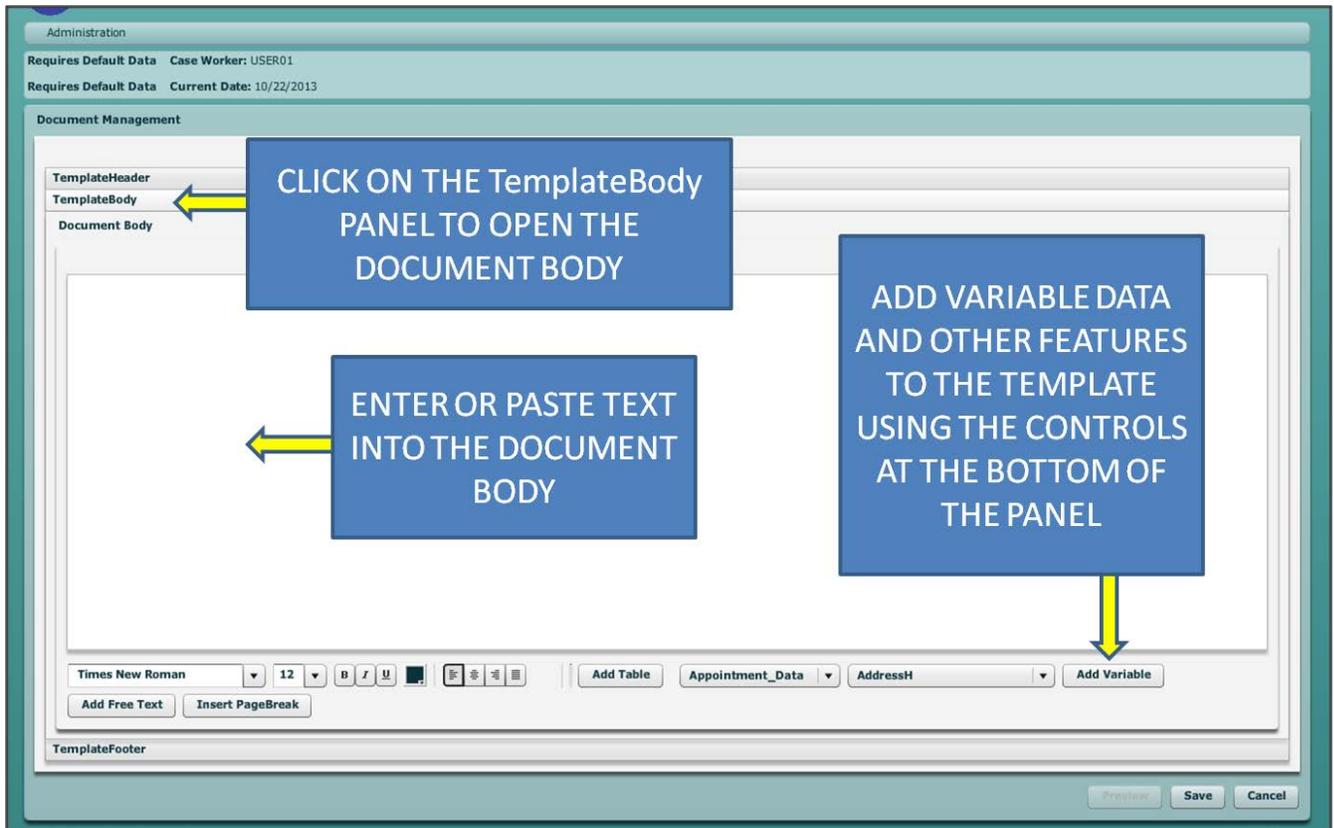
In the TemplateHeader panel the user must enter a Document Name, select the Functional Area, and enter a unique Document Number. You can optionally select checkboxes to add a seal, address, and date at the top of the document. (Signature Required and OMB Form fields are for future use). *The document name and number cannot be modified once entered.*



## 2. TemplateBody

### Adding Text and Variables

The TemplateBody panel contains the main contents of the document. Text can be entered and formatted, and variables and free text boxes inserted. Variables pull data from the database when the document is generated. Free text boxes prompt the user during document generation to enter text to be inserted in the document. Free text boxes require a Text Key, which is the prompt the user will receive when generating the document, and a maximum size.



Data variables will appear in the template with brackets, e.g. {NCP.SSN}. The data will be pulled from the system when the document is generated.

Free text boxes will appear in the template with Free Text tags, e.g. [FREE TEXT][KEY=employed-since-date/][NUMCHARS=15/] [/FREE TEXT]

## 3. Adding Tables

The Add Table button opens a wizard to allow the insertion of tables. The MTS supports four types of tables:

Table Type 1 is to be used only with data from the Children Data Group. Table 1 allows you to enter a title at the top of multiple columns and a variable from the Children Data Group in each column. When the table is generated, it will show variable data for all children on the case with

a row for each child. (Do not mix Children data and other data – do not use Children data in other tables.)

Child Name	DOB	SSN
Abigail Marie Hale	May 02, 2008	111-XX-2222
Fred Steven De San Lazaro	February 06, 2012	987-XX-8543
Walter J Landry	January 06, 2009	798-XX-0998

Table Type 2 is a simple two-column table with labels in the left column and variable data in the right column.

Name	Cindy Elizabeth Hale
Address	104 Jones St, Mccullough, AL, 20882
DOB	January 01, 1990
SSN	549-XX-3456
Enrollment Number	54

Table Type 3 is intended to be used for court headers. It has two columns with multiple rows. Labels or data variables can go in any row or column.

<b>Zuni Tribe NM</b>	
<b>TRIBAL CHILD SUPPORT AGENCY</b>	
	Co-Petitioner, <b>AFFIDAVIT-CONTEMPT</b>
<b>Cindy Elizabeth Hale</b>	Co-Petitioner, <b>Zuni Tribe NM</b>
	<b>CASE NO: DN9863296532</b>
and	
<b>Jerry Howard Jones Sr.</b>	Respondent

Table Type 4 is a four-column table with labels in the first and third columns and variable data in the second and fourth columns.

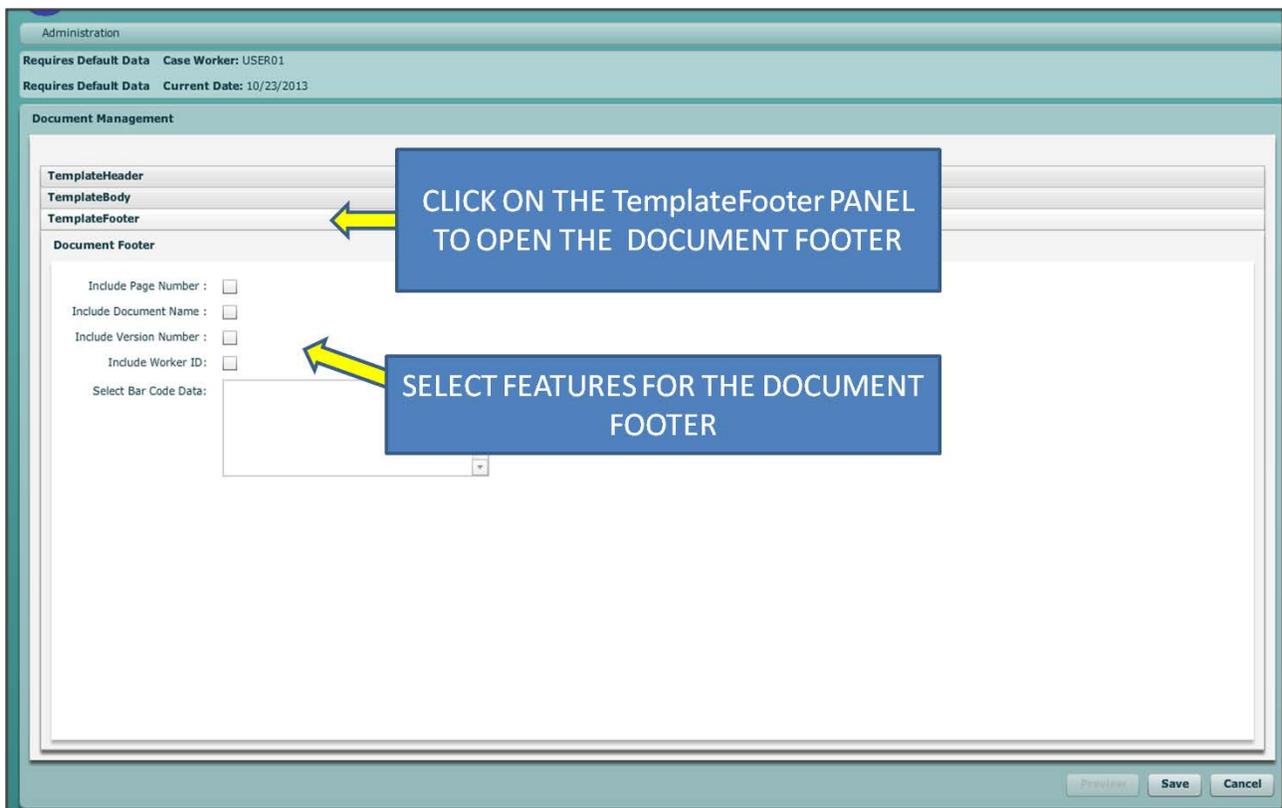
CP Name	Cindy Elizabeth Hale	CP SSN	549-XX-3456
NCP Name	Jerry Howard Jones Sr.	NCP SSN	345-XX-7658
NCP Occupation	Claims Adjuster	NCP Income	1200.00

Tables will appear in the template with Table tags, e.g.

```
[TABLE][TABLENUMCOLS=2/][TABLEJUSTIFY=Right/][BORDERSIZE=1/][TYPE=1/][TABLECOLUMN=[NAME=Name][VALUE={Children.Name} FontName=Times New Roman FontSize=12 ]/][TABLECOLUMN=[NAME=Date of Birth][VALUE={Children.Birth_Date} FontName=Times New Roman FontSize=12 ]/][TABLE]
```

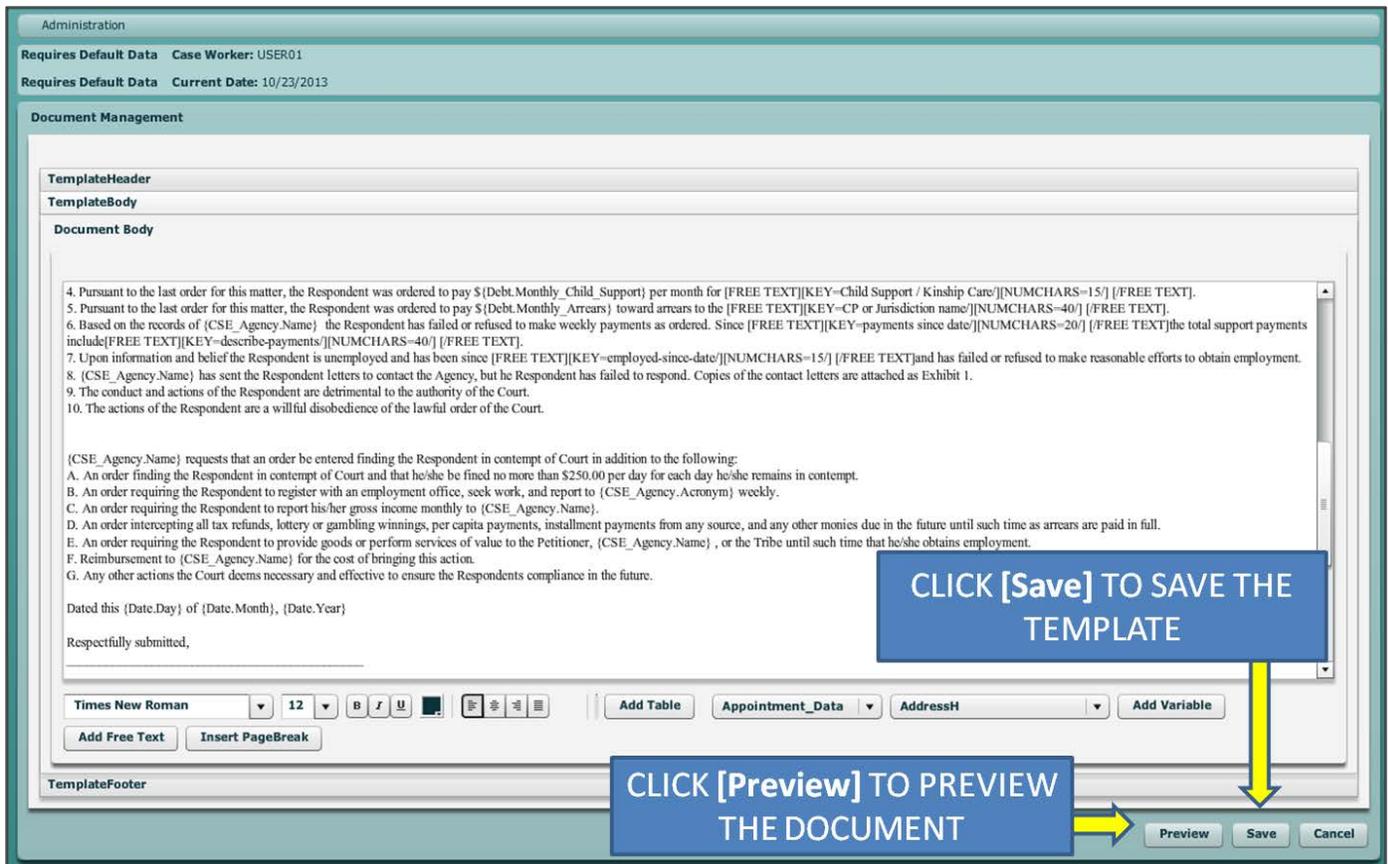
#### 4. TemplateFooter

The TemplateFooter panel allows the user to select items to be printed at the bottom of the document – page number, document name, document version, and worker name. (Bar Code does not work yet.)



### Step 3 – Preview and Save Template

1. After header, body, and footer information have been entered, preview the template by clicking the **[Preview]** button. The preview will show the PDF format of the generated document.
2. Make any necessary changes and then click **[Save]** to save the template.



### Step 4 – Test the Document

1. Login as a *caseworker or financial worker* to test the generation of the document using actual case and participant data.
2. Click on the Document Index to search for your document.

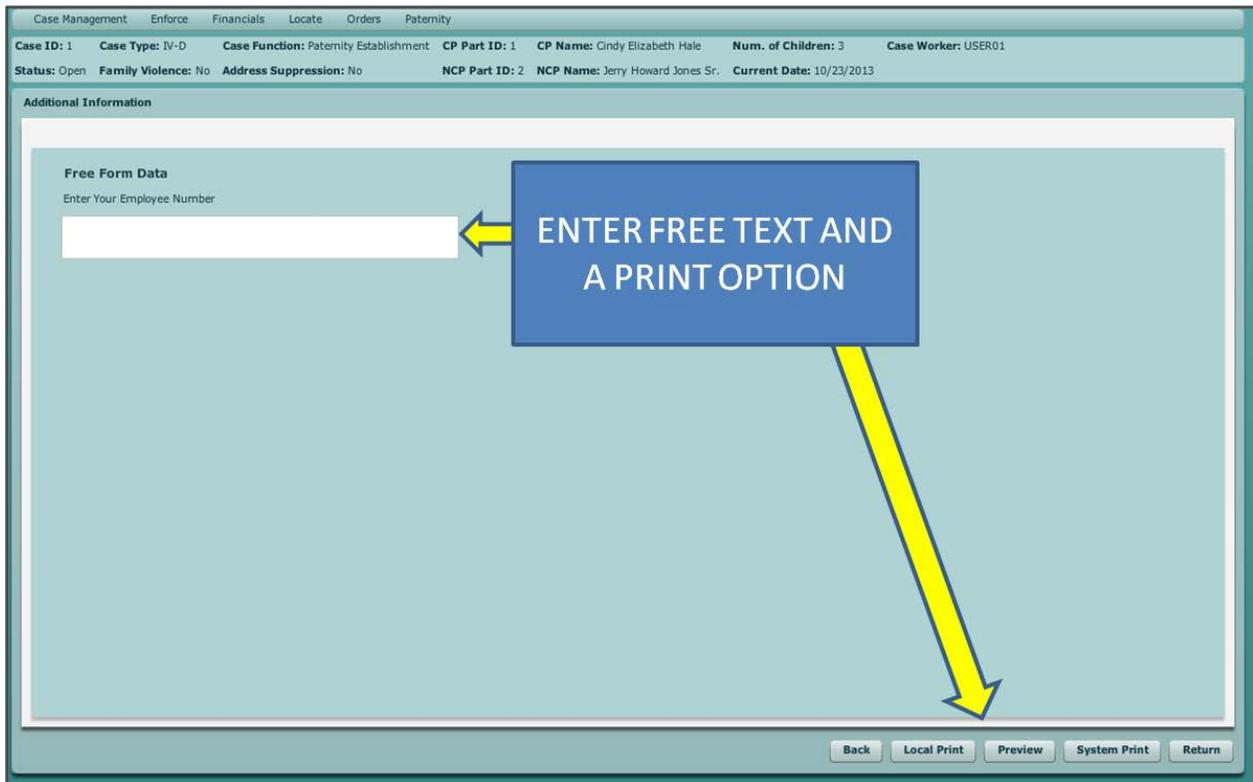


3. In the Document Search panel, find and select your document and click **[Print Selected Document]**.

4. The MTS will prompt you to select a case, participant, appointment, and/or whatever other data is necessary to complete your document.
5. Select PDF or RTF (editable) as your output format. Select data for all dropdowns and click [Next].

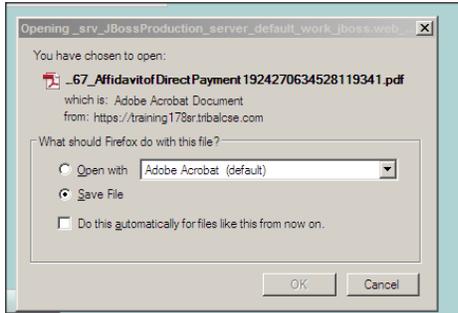
6. Enter all required free text.
  7. Click on one of the printing options.
- **[Local Print]** will open a PDF or RTF popup for you to print on your local printer. The PDF version *will* become part of the case history.
  - **[Preview]** will open a PDF or RTF popup for you to view and then print on your local printer. The PDF version *will not* become part of the case history.
  - **[System Print]** will direct the PDF or RTF output to your system printer. The PDF version *will* become part of the case history.

*The RTF versions are editable, but the edits will not be part of case history.*



8. The output popup will look different depending on your browser.

- Firefox looks like this:



- Chrome looks like this:

