OCT   3 2003

TO: All Headquarters Employees

FROM: Director, Office of Tribal Programs

SUBJECT: Instructions for Communications With Tribal Leaders

Effective July 1, 2003, the Indian Health Service (IHS) Director established and implemented a new process for communicating with Tribal Leaders throughout the Nation. On September 4, 2003, he issued Special General Memorandum (SGM) 2003-02, Communication with Tribal Leaders. All future correspondence from the Director to Tribal Leaders will be addressed personally to each of them in recognition of and respect for the Government-to-Government relationship between the IHS and each Tribal Government.

The Office of Tribal Programs (OTP) maintains a mailing list/database which includes the names and addresses of Tribal Leaders to be used for personalizing the Tribal Leader letters. Because it is extremely important that the OTP mailing list/database be kept current at all times, the Director has requested the Area Directors' assistance to ensure that changes and other contact information (names, titles, organizations, addresses, phone and fax numbers, e-mail addresses, etc.) in Tribal Leaders, health directors, health boards, urban program directors, service unit directors, etc., are provided to the OTP as they occur.

As stated in the SGM, specific information regarding the use of the mailing list/database to accomplish the related mail merging for letters and other correspondence would be provided separately by the OTP. Therefore, all letters to Tribal Leaders will be prepared for the Director's signature following the IHS Executive Correspondence Guidelines (see Attachment 1). To prepare a letter to Tribal Leaders, and accomplish a Word Mail Merge utilizing the OTP mailing list/database, you must have Word XP. Previous versions of Word will not work with the attached instructions. The steps for creating a Word Mail Merge document are provided at Attachment 2.

If you have questions or changes concerning the OTP database, contact Ms. Merry Elrod, OTP Database Project Manager by e-mail or telephone at (301) 443-1044 or Ms. Sharon Folgar, Program Analyst by e-mail or telephone at (301) 443-1104. For questions concerning the Word Mail Merge, contact Ms. Folgar.

Assistance for mailing letters to Tribal Leaders is available through the Program Support Center. For additional information concerning mailing, contact Ms. Crystal Sandoval in IHS Support Services, Division of Administrative Support at (301) 443-0815.

I am confident I have your support in this important endeavor to ensure that correspondence reaches the appropriate official in a timely and accurate manner.

/Douglas P. Black/

Douglas P. Black

Attachments

EXECUTIVE CORRESPONDENCE GUIDELINES

- For letters to Tribal Leaders, the directions for the inside address and salutation are in section 4.3.3, page 69.

- For the address block, the directions are in section 6.2.3, page 92, at the first bullet and on page 93 at the first and second bullets.

- For numbering the succeeding pages of the letter, the directions are in section 6.2.7, page 94.

- When mail merge is used for addressing letters to Tribal Leaders, two exceptions to the Guidelines are necessary: 1) Place the Tribal Leader's title ("Chairman", "Governor", "Chief," etc.) and the name of the Tribe on separate lines, and 2) if the Tribe's name is long enough to require a second line, put the second line flush left, not indented two spaces as you normally would do.

- Submit a draft letter to the Executive Secretariat for editing and approval for final preparation.

- When doing the letter in final, prepare two yellow file box copies, and obtain clearances from the program officials in the originating office, other programs if necessary, the Office of Tribal Programs, and the Office of Tribal Self-Governance.

- Submit the two yellow file box copies with the clearance signatures and the 557 final, personalized letters for the Director's signature to the Executive Secretariat.

MAIL MERGE INSTRUCTIONS

1.   Click Tools, Letters and Mailings, Mail Merge Wizard. The Mail Merge Wizard pane will open to the right of your document.

2.   From the 'Select document type' option in the Mail Merge pane, choose the type of document you want to create (it will most likely be a Letter). At the bottom of the Mail Merge pane click 'Next: Starting document.'

3.   From the 'Select starting document' option, choose your document.

      You will choose 'Use the current document' to type a new letter.

      You will use 'Start from existing document' for a letter you have already drafted. At the 'Start from existing' option, select the document to be used and click 'Open.' If you do not see your document listed, click '(More files)' and 'Open.' Locate and open your document.

      At the bottom of the Mail Merge pane, click 'Next: Select recipients.'

4.   At 'Select recipients' option, choose 'Use an existing list.' Beneath the 'Use an existing list' option, click on 'Browse.'

5.   The 'Select Data Source' window will open. Navigate to I:\IHSYSTEM\otp\Merge. Sselect OTA v_MergeMail. Word will use this to automatically log into the OTP database and bring in the data.

6.   The 'Mail Merge Recipients' window will open. To filter records, click the down arrow (▼) in any field heading and select 'Advanced.'

7.   The 'Filter and Sort' window will open. Use the Field drop down option to choose the field you will filter - for most Dear Tribal Leader letters you will choose 'group_code.' You can type 'g' to move directly to 'group code.'

8.   Use the 'Comparison' drop down menu to choose 'equal to.'

9.   Enter the group code in the 'Compare to' window. Tribal Leaders are Group Code 150. Click 'OK.'.

10.   The list will filter and the 'Mail Merge Recipients' window will appear. Click 'OK' in this window.

MAIL MERGE INSTRUCTIONS (continued)

11. Click 'Next: Write your letter' at the bottom of the Mail Merge pane.

12. At this point you will begin building the address block and inserting the appropriate fields. You will need to place your cursor where the address block will start in the document.

13. In the "Write your letter' option in the Mail Merge pane on the right, click on 'More items.' The 'Insert Merge Field' window will open. For the Insert option 'Database Fields' should be chosen.

14. Select 'prefix' and click on 'insert' and 'close.' The 'prefix' field will now be in your document. Hit the space bar once.

15. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'full name' and click 'insert' and close.' Hit return once.

16. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'title' and click 'insert' and 'close." Hit return once.

17. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'company' and click 'insert' and 'close.' Hit return once.

18. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'addresses_1' and click 'insert' and 'close.' Hit return once.

19. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'city' and click 'insert' and 'close.' Hit return once.

20. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'city' and click 'insert' and 'close.' Hit the comma and then the space bar once.

21. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'state' and click 'insert' and 'close.' Hit the space bar twice.

22. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'zip' and click 'insert' and 'close.' Hit return twice.

23. Now you will format the address block to 'wrap-around' the longer lines. Place your cursor at the beginning of the address block.

MAIL MERGE INSTRUCTIONS (continued)

Left click your mouse and hold the button down while you drag the cursor over the entire address block; then release the left button. The whole section should be blacked out.

24. Type 'Dear'.

25. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'title' and click 'insert' and 'close.' Hit the space bar once.

26. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'lname' and click 'insert' and 'close.' Type a colon and return twice.

27. Type the body of your letter.

28. If you are referencing the specific Area Office in your letter, insert the 'area_office' field in the appropriate place in the letter. Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'area_office' and click 'insert' and 'close.'

    This will only insert the Area name (e.g., Alaska, Bemidji, Oklahoma). You will need to include the text 'Area Office' in your letter (i.e., <<area_office>> Area Office).

29. For succeeding pages you will need to include additional fields in your heading. At the top of the second page type 'Page 2 -.' Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'prefix' and click 'insert' and 'close.' Hit the space bar once.

    Click on 'More items' in the right hand pane. The 'Insert Merge Field' window will open. Select 'full_name' and click 'insert' and 'close.' Return twice; the body of the letter should continue on the third line.

30. When the letter is complete, click 'Next: Preview your letters' at the bottom of the Mail Merge pane. In the preview, you will be able to see what the database fields look like when merged.

31. Click 'Next: Complete the merge' at the bottom of the mail merge pane.

32. You may now 'Edit individual letters' or 'Print.'

NOTE: The Font for letters to Tribal Leaders should be New Times Roman 12.