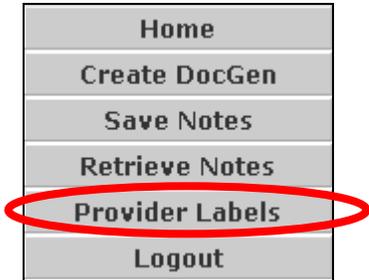


**Initiating a Provider Labels Request**

On the left hand side of the WELCOME page (and every page throughout the DocGen system) you should see an options menu that looks like this:



Select the PROVIDER LABELS option to create mailing labels for selected facility types. When the Provider Labels option is selected, the CAPS Provider Labels Request page will display.

**CAPS Provider Labels Request Page**

The CAPS Provider Labels Request page looks like this:

The screenshot shows the 'CAPS Provider Labels Request' page. At the top, it states: 'LABELS ARE ONLY PRINTED FOR PROVIDERS WITH ACTIVE LICENSES AND A STATUS OF: APP(APPROVED), PRO(PROVISIONAL), REG(REGULAR), OR RES(RESTRICTED)'. Below this is a table with columns 'Select', 'Region/County', and 'Description'. There are two rows in the table. Below the table are five input fields for 'ENTER FACILITY TYPE CODE:' and two buttons: 'Reset' and 'Submit'.

Select	Region/County	Description
<input type="radio"/>	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
<input type="radio"/>	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES

ENTER FACILITY TYPE CODE:

Reset Submit

Some important things to note when submitting a labels request:

- Labels will only be created for facilities with ACTIVE licenses. If a license is expired, terminated or suspended, a label will not be created.
- Labels will only be created for facilities with a STATUS of Approved (APP), Provisional (PRO), Regular (REG) and Restricted (RES). If a license has a status other than the four listed, a label will not be created (for example - “intending to be licensed” kinship licenses will not get a label.)

- The facility address used for the label will follow a hierarchy (if the facility has multiple address types listed on PADL.) This hierarchy is Mailing, Residential and Warrant. If a facility has no address on PADL, a label will be created that contains NO ADDRESS for the facility name and facility number.
- Labels for **adoption** facilities (ADP or CAA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or CRA (Regional FRS Supervisor) staff type.
- Labels for **tribal** facilities (TFA, TFF, TFN, TGK, TGN, TKI and TRA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or Tribal staff type.

**Select Options**

Select	Region/County	Description
<input type="radio"/>	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
<input type="radio"/>	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES

Your contact REGION and COUNTY will automatically be defaulted.

- Either the County or Region radio button must be selected in order to generate a labels request.
- County and Region are both drop-down lists and the county/region can be changed as necessary based on the labels needed (following security edits as identified above.)
- If a County or Region is not selected, you will receive an error message when you attempt to submit your request that a County or Region is required.

ENTER FACILITY TYPE CODE:	<input type="text"/>
	<input type="text"/>

No facility types will automatically be defaulted.

- Facility Type Code is a drop-down list and at least one facility type must be selected in order to generate a labels request.
- Up to a maximum of five facility types can be selected.
- If at least one Facility Type Code is not selected, you will receive an error message when you attempt to submit your request that a Facility Type Code is required.

<input type="button" value="Reset"/>	<input type="button" value="Submit"/>
--------------------------------------	---------------------------------------

If you wish to clear all entries made on the labels request page before submitting, you can click the RESET button.

When you are ready to submit your request, you can click the SUBMIT button. When the submit button is selected, the CAPS Provider Label List will display.

- If there are no facilities matching the request, you will receive an error message when you attempt to submit your request that no providers were found matching the selected criteria.

**CAPS Provider Labels List**

The CAPS Provider Labels List page looks like this:

**CAPS Provider Labels List**

Label Request For: 025 - Lewis & Clark County Providers    Facility Types: YFH

**Instructions:**

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.

**OR**

Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, [Click Here!](#)

\* You can change how the list is sorted by clicking on the column header. (Default is Provider Name Ascending)

<u>Toggle Select</u>	Provider ID	Provider Name ^	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
<input checked="" type="checkbox"/>	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
<input checked="" type="checkbox"/>	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark
<input checked="" type="checkbox"/>	0001116001	Montana Home	YFH	R Residence (physical)	3395 C B Loop		Helena	MT	59602-9598	Lewis & Clark
<input checked="" type="checkbox"/>	0001152001	Reynolds Mary	YFH	R Residence (physical)	1311 Bighorn Rd		Helena	MT	59602-7612	Lewis & Clark

This page will display the list of providers who match the criteria entered on the CAPS Provider Labels Request page.

Label Request For: 025 - Lewis & Clark County Providers    Facility Types: YFH

**Instructions:**

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.

**OR**

Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, [Click Here!](#)

The top part of the page will display the criteria used to generate the list (in this case, I submitted a request for all active YFH (Youth Foster Home) facilities in County 25 (Lewis & Clark).

Instructions for selecting providers and how to use the PDF labels and Mail Merge features are also listed for you.

- NOTE: Creating labels using the PDF Labels option or the Mail Merge option are heavily dependent on additional settings on your personal computer. If there are problems printing the labels created using CAPS DocGen, it may have to do with those settings in Adobe (PDF) or Word (Mail Merge). Please keep that in mind when creating labels!

\* You can change how the list is sorted by clicking on the column header. (Default is Provider Name Ascending)

Toggle Select	Provider ID	Provider Name ▲	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
<input checked="" type="checkbox"/>	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
<input checked="" type="checkbox"/>	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark

The list will display all providers who match the criteria entered on the CAPS Provider Labels Request page. Information displayed includes, Select Option, Provider ID, Provider Name, Facility Type, Address Code, Address 1, Address 2, City, State, Zip and County.

- All facilities will default as selected for a label. You can click TOGGLE SELECT to UNSELECT all facilities. You can also select/unselect individual facilities by clicking the check box next to each facility.
- The list will automatically be sorted in ascending order by PROVIDER NAME. You can change the sort order of the list by clicking on any column header.



Clicking the BACK button will return you to the CAPS Provider Labels Request page.

Clicking the PDF Labels button will take you to the CAPS Provider Labels Layout page.

Clicking the MAIL MERGE button will create a merge file arranged in table format. This file will contain the address information for the providers checked on the list.

## **PDF Labels**

The CAPS Provider Labels Layout page looks like this:

**CAPS Provider Labels Layout**

**Select Label Layout**

**Layout:**     Avery 5160 address labels (3 x 10 columns)

Avery 5162 address labels (2 x 7 columns)

Avery 5163 address labels (2 x 5 columns)

You will have the option of selecting one of three different label sizes. You must select one of the layouts in order to continue processing your labels request. If a Layout is not selected, you will receive an error message when you attempt to submit your request that a Label Layout is required.

- Avery 5160 address labels. These labels contain sheets of 30 labels (3 across and 10 down.) These labels would be appropriate for regular letter sized envelopes.
- Avery 5162 address labels. These labels contain sheets of 14 labels (2 across and 7 down.) These labels would be appropriate for larger envelopes.
- Avery 5163 address labels. These labels contain sheets of 10 labels (2 across and 5 down.) These labels would be appropriate for larger envelopes or packages.

Clicking the BACK button will return you to the CAPS Provider Labels List page.

Clicking the CONTINUE button will take you to the CAPS Provider Labels Starting Position page.

The CAPS Provider Labels Starting Position page looks like this:

CAPS Provider Labels Starting Position for Avery 5160		
Select Label Starting Position		
<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3
<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> 6
<input type="radio"/> 7	<input type="radio"/> 8	<input type="radio"/> 9
<input type="radio"/> 10	<input type="radio"/> 11	<input type="radio"/> 12
<input type="radio"/> 13	<input type="radio"/> 14	<input type="radio"/> 15
<input type="radio"/> 16	<input type="radio"/> 17	<input type="radio"/> 18
<input type="radio"/> 19	<input type="radio"/> 20	<input type="radio"/> 21
<input type="radio"/> 22	<input type="radio"/> 23	<input type="radio"/> 24
<input type="radio"/> 25	<input type="radio"/> 26	<input type="radio"/> 27
<input type="radio"/> 28	<input type="radio"/> 29	<input type="radio"/> 30

**Please Follow These Printing Tips:**

- In your Adobe PDF printing options:
  - If applicable to your version of Adobe Reader, make sure you set Page Scaling to None, and UNcheck Auto-Rotate and Center.
  - OR
  - If applicable to your version of Adobe Reader, make sure you UNcheck the Shrink Oversize Pages to Paper Size option.
- To prevent label waste, make sure you print a test page first, and see if the alignment is correct, before you print on a label sheet. If alignment is incorrect, try printing on a different printer.
- If correct printing alignment cannot be achieved, please go back to the CAPS Provider Labels List page and choose the Mail Merge option.

Back   Reset   Submit

This page will allow you to select the starting position for your labels, based on the type of label you selected (5160, 5162 or 5163.) This is so you can utilize partially used sheets of labels and not have any label waste! Select the radio button in front of the desired starting position and that is where the first label will print.

This page also contains some PRINTING TIPS for PDF labels. **Please pay close attention to these tips as they may affect the result of your printed labels.**

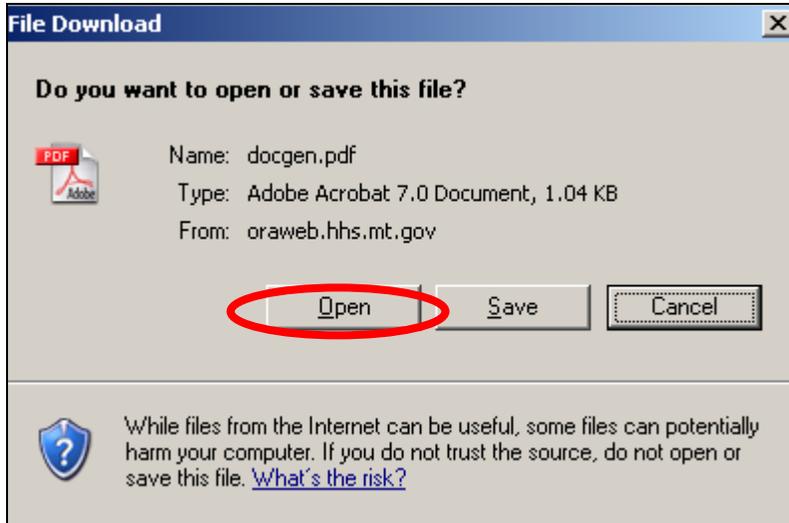
- Setting your page scaling to none and unchecking auto-rotate and center is something you will need to verify each time you print labels in the PDF format.
- Where these settings are located are dependent on the version of Adobe Reader you have on your machine.
- It is always recommended that you print a “test page” (print your PDF document on regular paper) before you attempt to print on an actual sheet of labels. This will allow you to verify alignment.

Back   Reset   Submit

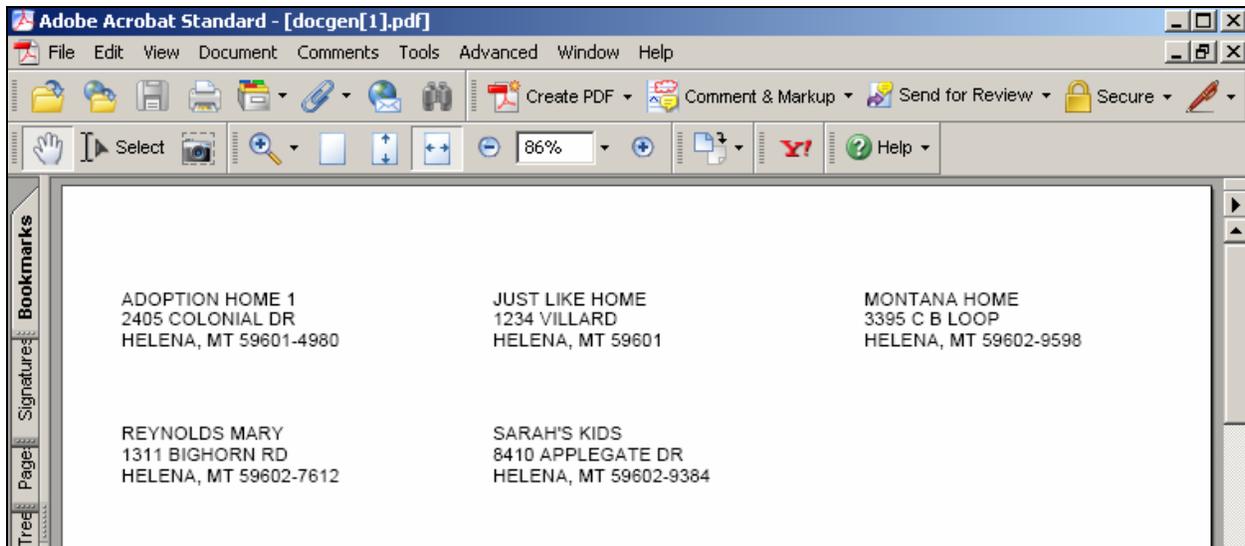
Clicking the BACK button will return you to the CAPS Provider Labels Layout page.

Clicking the RESET button will set the label starting position back to “1”.

Clicking the SUBMIT button will create the PDF document for your labels. When you click the SUBMIT button you will receive a File Download box that looks like this:



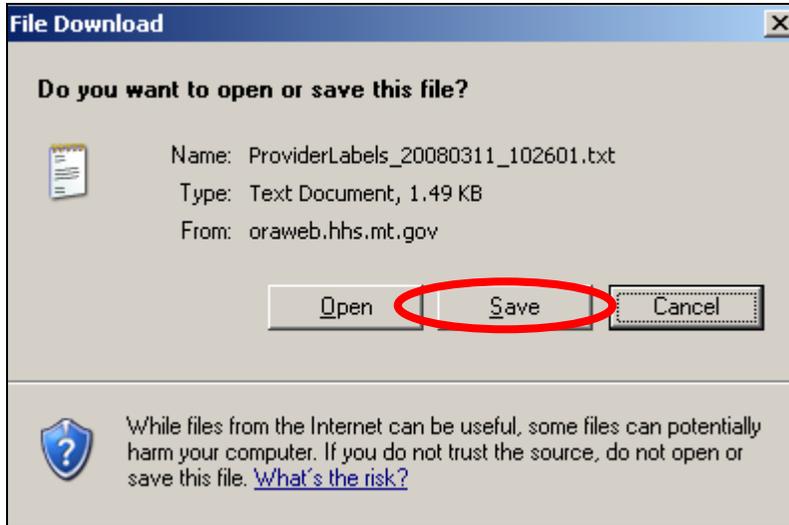
Click OPEN to generate the PDF document. You should then receive a document that looks similar to this (again, based on the label type you selected):



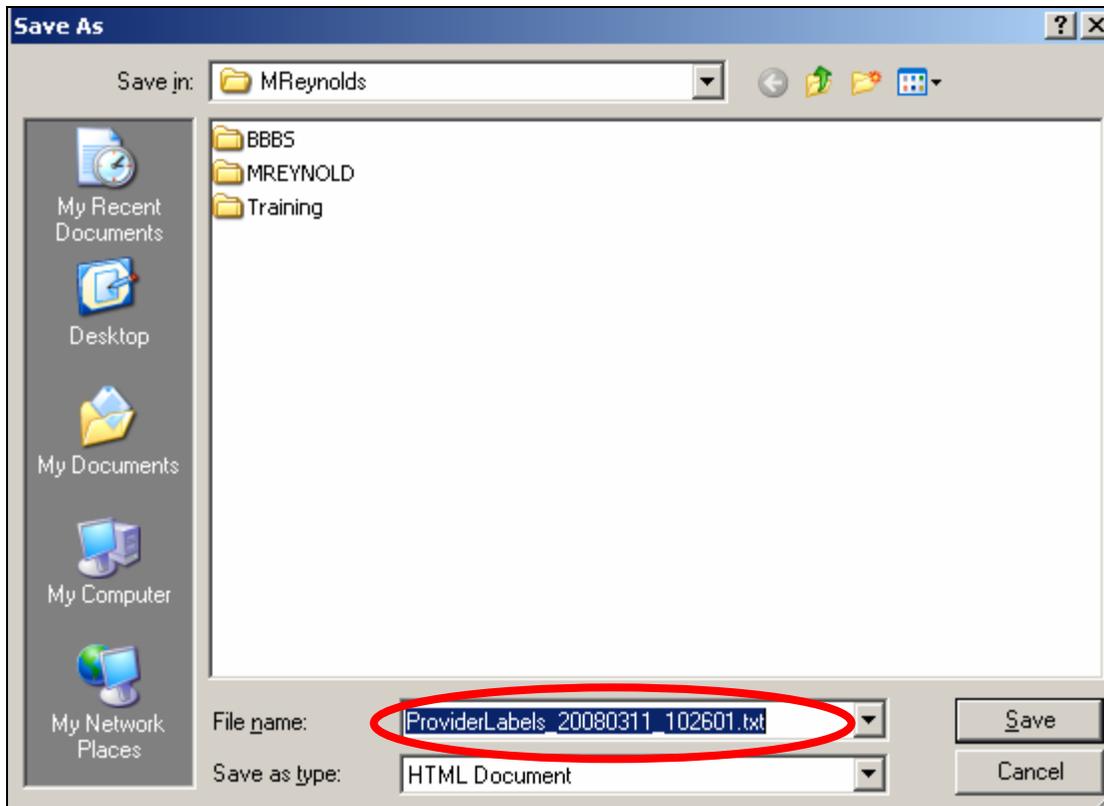
Once the PDF document has been created, you can print your labels just like you print any other document.

## Mail Merge

When you click the MAIL MERGE button on the CAPS Provider Labels List page, you will receive a File Download box that looks like this:



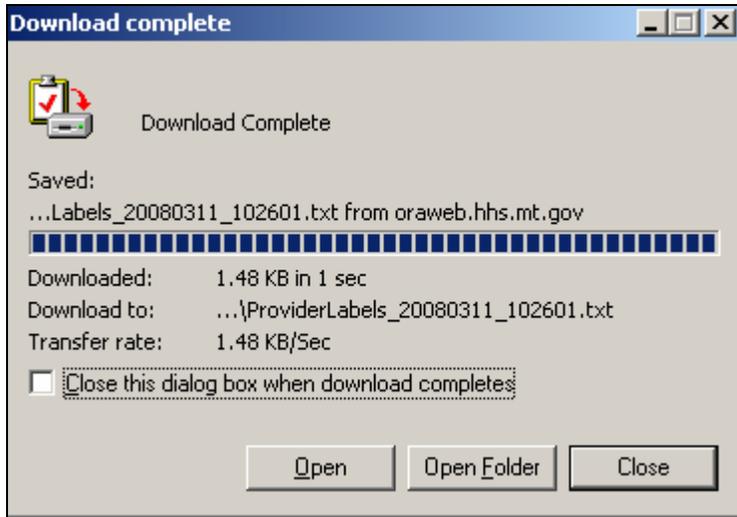
Click SAVE to save the file to your computer. You should receive a Save As box that looks similar to this:



When the Save As box appears, click SAVE. You can store the document wherever you typically save files on your computer. This may be different for each worker.

- The file will be saved as a .txt file – do not change the file extension as this can affect the ability to merge the file into your main document later.
- The file name will default to “ProviderLabels\_YYYYMMDD\_HHMMSS.txt” where YYYYMMDD = current date and HHMMSS = current time.

When you click SAVE, you may receive a Download Complete box that looks like this:



You can click CLOSE at this point. You will use the file later when you perform the Mail Merge in Word.

- For assistance with using the Mail Merge feature in Word, click on the “click here” link located in the instructions area of the CAPS Provider Labels List page

Label Request For: 025 - Lewis & Clark County Providers Facility Types: YFH

**Instructions:**

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.

OR

Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, [Click Here!](#)