

Linking Documents Within the LSRTIS Mail Log System

Background

Documents that are housed electronically in the Mail Log system will not need to be printed out; however, there is a mechanism linking documents that are related. Think of linking as stapling documents together or placing them in the same folder.

Linking Documents

There are two types of linking available in the Mail Log: Functional Linking and Informational Linking.

A. Functional Linking

1. Two incoming documents have been received, but only one outgoing correspondence is required.
Example: A request for a process deviation is submitted. The Specialist verbally requests more information prior to a decision. The second submission will be FUNCTIONALLY linked to the initial request and there will be only one outgoing correspondence for the two incoming submissions.
2. This happens prior to closing the Mail Item (RM).
3. The documents being functionally linked must be in the same Activity within the Mail Log; for example, both must be in Review (Specialist).
4. The Lowest Number is the Parent Document.
5. **Outgoing documents must be attached to the Parent Document.**
 - a. The highest Mail Log number will be sent back to the firm with the statement *"See ML xxx for CVB response to this Submission"*.
 - b. **Note: Outgoing correspondence erroneously attached to the Sibling record will be released back through the Portal to the firm.**
6. Actions are taken on the Parent Document – Child Documents will not have the Move Forward function.

B. Informational Linking (more common use)

1. One incoming document may have many related submissions and outgoing responses.
Example: Firm responses to an inspection may be INFORMATIONALLY linked to the Inspection Report.
2. This can be done on either Active or Completed Mail Log Items.
3. Typically done by the Specialist, but can be done by the BCA under Review (BCA).

C. Procedure:

1. Open the Mail Log item that you will be working on (the lowest numbered item for Functionally Linked Mail Log Items).
2. Click on the Edit Mail Item link.
3. Within the Info Tab, click on the "Link Mail Item" link.
4. In the Related Mail Item Number, enter the Mail Log item that you want to be linked.
5. For Functionally linked items – Click on Save Sibling.
6. For Informationally linked items – Click in the box for "Informational Linkage?", then choose Save Sibling.