



# PUBLIC TRUSTEE AND GUARDIAN

## POLICY

DOCUMENT PROPERTIES	
Name of Policy	<b>Correspondence and Communication</b>
PTG Policy Number	2017-8
Endorsed by SLG	21 July 2016
Authorised by	Andrew Taylor, Public Trustee and Guardian
Date for review (plus three years)	21 July 2019

### LEGISLATION

The *Territory Records Act 2002* encourages open and accountable government by ensuring that Territory records are made, managed and, if appropriate, preserved in accessible form; and to support the management and operation of Territory agencies; and to preserve Territory records for the benefit of present and future generations; and to ensure that public access to records is consistent with the principles of ACT Freedom of Information legislation.

The *ACT Government Social Media Policy Guidelines* are designed to assist with the management of social media use in the ACT Government. They are in two parts. Part One contains guidelines for using social media. Part Two contains 'how to' information and facts sheets about using social media.

*The Privacy Act 1988* regulates the handling of personal information about individuals. Personal information is information or an opinion about an identified individual, or an individual who is reasonably identifiable.

The *ACT Government Social Media Policy Guidelines* are a useful resource for staff regarding private and official use of social media.

### POLICY

The Public Trustee and Guardian (PTG) is not only a government agency but also a commercial entity. Service to our customers is paramount and one of our best marketing tools is to ensure that we treat our customers and the wider community in a professional and businesslike manner. Courteous, prompt and effective communication is a vital part of providing a professional service.

#### Telephone calls

Telephone calls should be answered promptly, professionally and courteously. Staff should answer another staff member's telephone when it rings, taking a message for the staff member to return the call or follow-up. Voicemail facilities are provided by ICT Shared Services and if an officer is unavailable to take a call it should be put through to voicemail. If a call is received by Reception and the officer is on leave, the caller should be advised accordingly and encouraged to leave a message on the officer's voicemail. If the matter is urgent, or if the caller insists on speaking with someone, the call should be put through to another officer in the Unit who can assist.

Staff should ensure:

- All messages left on voicemail or in your Outlook in-box are responded to promptly and on all occasions within 24 hours of the message being received.
- When taking leave for more than a few days, an 'out of office' message should be recorded to ensure that a caller does not leave a message that needs to be responded to urgently. The 'out of office' message should state how long you will be out of the office and direct the caller to another person/number if urgent.

Staff are entitled to discontinue a threatening or abusive call after advising the person that you will terminate the call.

## **Emails**

Staff should obtain an email address from clients where possible and use email as the preferred means of corresponding and sending letters. If attaching a letter it should be signed. Emails to customers, members of the public and colleagues are a formal means of communicating and the language used should not be overly informal/casual or familiar.

Emails should -

- Always use a brief, accurate subject header.
- Use a proper salutation unless signed informally by the client. Unless you are on first-name terms with the recipient use the person's title (Mr. Mrs. Ms. or Dr.) with their last name, followed by a comma or a colon e.g. Good Morning/Hello Mr. Jones
- Make the email easy to read, do not use slang, specific terms, jargon or acronyms, Use proper grammar, spelling and punctuation
- Be brief *and* polite. If your message runs longer than two or three short paragraphs, consider reducing the message or providing an attachment.
- Ensure that your signature block appears.
- Always edit and proof-read before sending.
- Include the correct "From" email address to ensure that the response goes to the desired address. It will default to your personal email address unless changed.

Emails should be responded to promptly, preferably on the day of receipt or within 24 hours of receipt. If staff are unable to address the email within the above timeframe, staff should acknowledge receipt of the email with an email response giving a timeframe for addressing the subject matter. Staff should then respond within the period specified.

If staff have an ongoing matter with a client, e.g. estate administration, ensure that you make contact with the client, preferably by email, at regular intervals to advise them of progress. It is evident from client feedback that regular contact, even where there is nothing to report, is important.

## **Out of Office**

If staff are absent for more than a few days, an "Out of Office" message should be used in Outlook to notify the sender that you are absent, your return date and a possible re-direction name and email address or phone number.

## **Letters**

Grammar and spelling used in letters should be of a high standard. Spelling and grammatical errors will result in poor public perception of the office. Letters should be responded to as quickly as possible. If you are unable to respond within a week (5 business days), you should either send an interim email response, or send a letter providing an interim response that you propose to respond in a specified time.

Some useful things to remember -

- A letter (whether by email or in writing) is a formal means of communication. Staff should use the appropriate form of address and sign-off. Generally, do not address clients by their first name in letters and always include the person's personal title and full name in the salutation.

If you know the name of the person you are writing to and address the letter to that person's name, sign it off as "Yours sincerely". If you do not know the name of the person you are writing to, you should use "Yours faithfully".

- Letters should be friendly, courteous, succinct and professional and using simple language avoiding technical jargon.
- If your letter is a response, it should always begin with "Thank you for your letter of ...."
- In closing your letter should provide details about how the person can contact you by phone or email.
- If you are enclosing material in your letter, refer to it in your letter ie "Attachment A or B" and make sure that it is enclosed.
- Avoid using an existing letter and over-typing it to create a new letter. It is a common mistake to forget to change some details, ie: the person's name, from the saved letter.

## **Privacy**

In all communications, officers should observe the information privacy principles in the *Information Privacy Act 2014* and refrain from referring to matters, events or people in a manner that might constitute a breach of privacy.

## **Territory Records Act**

For Territory Records Act purposes, all official correspondence including letters, emails and responses and any attachments to that correspondence must be printed and retained as part of your client file.

## **Interpreter and Translation Services**

PTG staff will use language aids, interpreters and translators to provide equitable client access to our services where required when English is not their first language or they have a hearing impairment. To ensure the service is equitable, clients are not required to pay the charges of translated material and professional interpreter services except in relation to deceased estates, trusts and when preparing an Enduring Power of Attorney due to specific laws that provide for payment of costs from the estate or relevant fund.

The level of language assistance required will depend on the client needs. This may range from seeking assistance from a staff member who has proficiency in a language other than English for general information; a telephone interpreter; or formal face to face interpreting and translation. PTG or ACT Government staff having a basic level of competency in a language other than English serve a useful purpose in providing everyday services to clients.

It should be noted that PTG and other ACT Government staff used in this manner are not qualified interpreters and are only to be used in non complex situations.

## **Media, Ombudsman's Office, MLA, Minister's Office, FOI Communication**

All telephone calls, letters or communications from the media, Ombudsman's Office, Minister's Office, enquiries from the Directorate's Liaison Officer (DLO) or requests under Freedom of Information should be immediately brought to the attention of the Public Trustee and Guardian or a Deputy Public Trustee and Guardian.

Often, when contact is made by the media, it is because something has gone wrong, or sensitive information is being sought or that they may be seeking to quote us in a media article.

PTG staff members should not provide any information to the media or comment on any issue, even if aware of any relevant facts, or have been personally involved in occurrences. Staff should state emphatically they are unable to provide any information and obtain their contact details and pass the enquiry directly to the Public Trustee and Guardian or a Deputy Public Trustee and Guardian.

## **Social Media**

Personal use of social media is defined as individual or private use, using your own personal social media accounts and where you are not commenting as an authorised officer of the ACT Government. You should not use work email or social media accounts for private blogging or other forms of personal online comment. Your personal account profiles should be linked to a personal email address for a Facebook or Twitter account. Do not use an ACT Government email address to establish a personal social media account. When accessing personal social media accounts via your Directorate's ICT systems, you must do so in a manner that does not interfere with your duties and is not inappropriate or excessive.

Examples of **unacceptable** use include:

- using Government resources to access or post any material that is fraudulent, harassing, threatening, bullying, embarrassing, sexually explicit, profane, obscene, racist, sexist, intimidating, defamatory or otherwise inappropriate or unlawful
- using the Government's ICT resources to provide on the record comments to journalists, politicians and lobby groups other than in the course of your official duties
- excessive time using social media that is not related to your work
- using your Facebook account to identify yourself as a Public Trustee and Guardian staff member.

**END OF POLICY**