Notes on Formatting

<u>Naming of case note files.</u>
Case notes should always be named in the following format (including the underscore at the beginning):

_SURNAME Firstnames case notes v1

Please also remember to update the version number each time you send in a new version of notes. Case notes must always be sent into cases@family-wise.co.uk, not sent on Facebook Messenger, even if you receive the notes this way.

<u>Recording electoral rolls and last known addresses</u>
Please always include the year(s) present when recording any addresses in case notes. It is important that case managers can easily see how recent an address is from the notes alone without looking it up themselves.

Example:

M1. John SMITH b. Q2 1945 Swindon (mmn JONES)
m. Q4 1970 Swindon – **Jane JONES**
2002-05: 1, Appletree Lane, Swindon, SN1 2BC [with Jane SMITH, sold 2006]
2006-17: 2, Peartree Avenue, Swindon, SN4 5YZ [with Jane SMITH and Tom SMITH, no recent sales, no new occupants]
Mr John Smith
2 Peartree Avenue
Wroughton
Swindon
SN4 5YZ

Remember to check if a property has been recently sold (Zoopla and Rightmove are good for this). If the property wasn't sold, it may have only been rented by the people you are looking for, so remember to check for any new occupants on TraceGenie.

<u>Recording addresses to write to</u>
A few important to remember when setting out addresses in letter format:
- Include the title of the person we are writing to (Mr/Mrs/Miss etc.)
- Include a full stop after any initials.
- Check the address for any missing village names – electoral rolls tend to miss this out! Zoopla House Prices and Royal Mail Post code finder are good for this.
- Remove **all** commas from addresses!

Addresses (and all other information) should be recorded under the person they relate to. Some case notes have been coming in where some of the information recorded for a particular person has been included in the notes after the details of that person's children.

<u>Wording for letters</u>
Please include the wording for letters in the following format:

Our research shows that you were born as [name, if birth name different to current name] in [year] in [registration district] to [father's names] and [mother's married name] (nee [mother's maiden name] and therefore the deceased would be your [relationship].

If a birth is in Q1, remember to include the year before and the year registered in your wording (e.g. born in Q1 1968/69).

If the relationship between the beneficiary is close (such as parent, child, or sibling), rather than stating the exact wording, we use 'therefore the deceased may be known to you'. This is to avoid any unnecessary distress in the event that we have written to the wrong person.

Please use the following wording to describe different relationships:
- **Parent** - the deceased may be known to you
- **Child** – the deceased may be known to you
- **Sibling** – the deceased may be known to you
- **Niece/Nephew** – the deceased would be your niece/nephew
- **Aunt/Uncle** – the deceased would be your aunt/uncle
- **Cousin** – the deceased would be your cousin
- **First cousin once removed** – the deceased would be your mother's/father's cousin
- **First cousin twice removed** – the deceased would be your grandmother's/grandfather's cousin

Examples:

[to M1.1. Mrs Mary Roberts (nee Smith)]
Our research shows that you were born as Mary Smith in 1971 in Swindon to John Smith and Jane Smith (nee Jones) and therefore the deceased would be your cousin.

[to M1.1.1. Mr James Roberts b. Q1 1995]
Our research shows that you were born in 1994/95 in Swindon to William Roberts and Mary Roberts (nee Smith) and therefore the deceased would be your mother's cousin.

[to S1. Mrs Natalie Brown]
Our research shows that you were born as Natalie Evans in 1965 in Oxford to Thomas Evans and Hannah Evans (nee Smith) and therefore the deceased may be known to you.

It is very important that all addresses and letter wording is accurate so that it can be copied straight into our letter generator here at HQ. This helps save the cases managers and the admin team precious time, particularly when there are multiple sets of case notes coming in at once.