



Using Mail Merge to Create Parent Reports

October 16, 2014

1. Complete the Universal Screening Spreadsheet
Save to a folder where you can find it (referred to as your Universal Screening folder).
2. Customize the Universal Screening Reports (one for each grade)
Documents can be downloaded from the HISD website or requested from the data consultant.
 - Open the Universal Screening Report. If this is the first time you've opened the file, choose "No" at the prompt.
 - Add School Name and Behavior Expectations.
 - Add School Year (**update each year**).
 - Delete measures that are not administered.
 - SAVE the file where you can find it (same folder as the universal screening spreadsheet).
3. Initiate Mail Merge Process
 - Mailings → Select Recipients → Use Existing List
 - Select the sheet for the correct grade. (The "plain" one without all the extra "stuff").
 - Check the box that the first row contains column headers. Click OK.
 - Mailings → Finish and Merge → Edit Individual Documents. Choose All Records.
 - This creates a **new** word document (Letters1) that can be saved, printed, or e-mailed. That document is not the original mail merge template, and it will not update. It's just a convenient way to save the reports to print later. This document contains personal student information.
 - If desired, SAVE the ready-to-print document and CLOSE.
 - You will now see the Universal Screening Report that you used as a source document for the mail merge. SAVE and CLOSE.

NOTE:

Once you complete Step 3 and save, you have now selected the spreadsheet that you will use for this mail merge. The next time you open the Universal Screening Report, you can choose "yes" when the dialogue box appears. At that point, you will not need to select recipients; you can go straight to "Finish and Merge."



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4. In the **WINTER AND SPRING of each school year:**
 - UPDATE the universal screening spreadsheet that is in your universal screening folder. DO NOT change the name or move the file.
 - Open the Universal Screening Report for each grade. Choose “yes” at the prompt.
 - Mailings → Finish and Merge → Edit Individual Documents. Choose All Records.
 - This creates a **new** word doc (Letters1) that can be saved, printed, or e-mailed. That document is not the original mail merge template, and it will not update. It’s just a convenient way to save the reports to print later. This document contains personal student information.
 - If desired, SAVE the ready-to-print document and CLOSE.
 - You will now see the Universal Screening Report that you used as a source document for the mail merge. SAVE and CLOSE.

5. In the **FALL of each future school year:**
 - Make sure the universal screening spreadsheet for the new year is in the Universal Screening folder.
 - Edit the Universal Screening Report for each grade to update the school year and make any other changes.
 - Select Recipients (see Step 3). This will be necessary to make sure that you are merging with the correct data.
 - Continue with the mail merge process as described in Step 3.