Litebite 29

Using Follow-up Absence/Late letter mailmerge

The following steps are for the INTEGRIS Administrator

- **When registers have been checked, Follow-up absence/late letters can be produced for any number of pupils that the school wishes to contact the parent/carer about.**
- **Absence/Late follow-up letters can be created for specific absence codes – e.g. Lates (either before of after registration closes), N for no reason given, code G for family holidays not agreed, code O for unauthorised absences.**
- **Follow-up letters can be customised by the school through editing the text and using fields to merge into the letter and once saved, can be used time and again**
- **Follow-up letters can automatically be stored in the respective Document Store for each pupil as well as be printed – any document in the Student Document Store will automatically go across into Parent Portal**

To enable Follow-Up letters to be stored in pupil's Document Store, go to **Modules > Attendance > Settings > Edit details** > ensure *Store Follow-up Letters in Integris Document Store* is ticked > **Save**

Using Absence/Follow_Up letters

- Go to **Modules > Attendance > Absence/Late Follow-up**

Consider the following:
- Decide on a single date or range of dates in Attendance that you want to report on
- Chose the attendance code you wish to report on (e.g. Lates)
- You can select students by Year group, class or use Student Find to locate specific pupils – select from the list or use the Hand icon to select all in the list

- Click **Next**
  The next screen will display list of pupils for whom the code(s) selected appear in their attendance register for the time period selected

Litebite 29

Using Follow-up Absence/Late letter mailmerge

The icon options available to the right of the screen are:
> **Create Follow up letter** (see below)
> **View letter history** of a selected pupil in the list (history of previous letters created)
> **View the absence details** of a selected pupil in the list (shows the number of occurrences of a specific code)
> **Select all** pupils in the list
> **View Student Profile** window of a selected pupil in the list

- **Select an individual pupil , group or all pupils** *(suggest chose one pupil when starting this for first time)*
- Click the **Create Follow up letter** icon (edit pencil)

*The next screen shows the default template for the letter which needs to be customised. If you have already saved a custom letter template, click **Load Letter Settings** and select from the list*

Customising Letter template:
Letter Destination : advise that *'Send letter to all marked as Family Mail Marker'* is selected (providing you have used Family Mail field appropriately!- see LiteBite23 – Using Family Mail Marker)
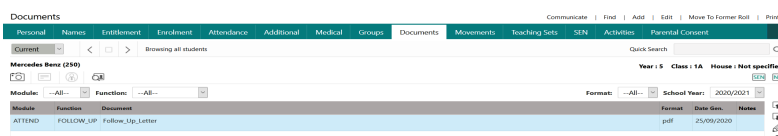*Letter Type* : usually this is set by student (i.e. all absences for the time period captured would be included in one letter)
Output Destination: 'letter' is the standard option (but schools can export into their own spreadsheet for mailmerging separately if they wish)

Section 1, 2 & 3: **Customise your letter** - **enter text you wish to appear in the letter** – any information that needs to come from the pupil record including **additional merge fields** such as S/he etc**. should be copied from the** *Mail Merge Fields* **list and pasted into the appropriate position within the letter.**

When you have completed the customisation (check for spellings and spacings etc!), go to *Save Letter Settings* **and then enter an appropriate name for the letter template** e.g. Lates before registers close **and click Ok.** *This will be available to you next time through the* **Load Letter Settings** option**.**

- Click **Ok**
A mailmerged letter will now be produced for the selected pupil(s) and a message confirming the number of pupils will appear. Click **Yes** to confirm or click **No** to make another selection.

  > A pdf report (letter) is now produced and depending on your browser settings, you will be asked to open or save the file. You can now print off the absence letter.

  > On screen, you will see <today's> date appear in the table for the pupil(s) selected for the letter.

  > A copy of the Follow-Up letter will automatically appear in the *Document Store* in the pupil(s)'s record listed as **ATTEND** in the *Module* column and '**Follow_Up**' in the *Function* column.

- You can now click B**ack** to return to the *Absence/Follow Up* report screen and set new criteria for another report.