

Online Learning Series: Creating Custom Letters

Frequently Asked Questions—

1. Q: Will this Online Learning topic be available as a recorded version?

A: Yes. This topic was posted in IEP Direct, 504 Direct and RTIm Direct under the Messages Tab for Central Office Personnel and in Online Help in late April 2016.

2. Q: How do users edit a custom letter that is already in the district or agency database?

A: Users may follow the same steps to update or further revise a custom letter already loaded to your database. Simply download the current template/letter, add or revise any text, add or delete any merge fields, and save the new version. Then upload the new version by clicking the edit pencil for the existing custom letter and browsing for the revised letter. Make any adjustments to the title, report/letter category and permissions. Then click save. This will overwrite the existing custom letter with the newly revised custom letter. For more step-by-step instructions, go to Online Help, click IEP Direct, click Letters & Reports, click Customizing Letters and then click Overwriting an Existing Custom Letter.

3. Q: If a letter is set to auto-log in Process Tracking for a student, but you then re-processes the same letter again, does it log it again? Is there a way to delete duplicate entries for auto-logged letters?

A: Yes, the auto-log feature, when set for a letter, will create an entry in Process Tracking for the student each time the letter is processed from the Letters & Reports screen.

If you are processing a letter and you do not wish for it to auto-log, be sure to click the Reset Log button on the screen once the letter is processed and ready for printing. This will remove the auto-log for that item.

You may also go to Process Tracking for that student and delete the auto-logged item that you do not want to keep.

REMINDER: The auto-log feature is only available in IEP Direct and 504 Direct.

4. Q: On the Manage Letters screen, what does the icon that looks like a chain link indicate?

A: The chain link icon is used to indicate that the letter is either a PWN or an Invite that is associated with a meeting reason or PWN letter type. This association allows users to select the letter they wish to use when scheduling a meeting or entering a PWN action in Process Tracking. ***This feature is only available in IEP Direct.***

5. Q: In RTIm Direct, are there other choices for letter type other than general or meeting invitation?

A: In RTIm Direct, the only choices for Letter Type on the Manage Letters screen are general and meeting invitation.

6. Q: Can users customize the Form-Meeting Attendance report or create their own attendance sheet to be used for Annual Review Meetings?

A: The built-in report, Form-Meeting Attendance, may not be revised or edited; users do not have the ability to download the template report to use for further customizing. Users may use the merge fields to create their own attendance sheet to be used for committee meetings.

7. Q: Can users link our district custom letter for Invitations and/or PWN so they automatically print?

A: Yes, users may use the letter association feature on the edit letter settings screen for a custom letter. You may then set the custom letter to be the default letter, if you wish. To set the invitation custom letter as the default, click the Meetings or Agreement Reasons link under the Letter Setup section in Maintenance. Then click the Letters button to reset the default radio button to the letter you want. To set the PWN custom letter as the default, click the Prior Written Notice Types link under the Prior Written Notice section of Maintenance. Then click the Letters button to reset the default radio button to the letter you want.

8. Q: Our district is moving toward using Google Docs instead of Word. Will the IEP Direct/504 Direct and RTIm Direct letters print correctly using Google Docs?

A: The letters available in the Centris Group products will work in Google Docs as long as the file name is saved with the following at the end: ".docx". Any of our older word documents (which happen to have the file name with ".doc" at the end) will not format correctly. Our programmers are working to convert all older documents to the newer ".docx" naming.

9. Q: May districts or agencies use their letterheads and/or school logos in letters? Is it possible to include graphics for forms (checkboxes) that are created and uploaded as custom letters?

A: Yes, districts or agencies may use their own letterheads/logos in creating a custom letter. Districts may include graphics or checkboxes on custom letters that are then uploaded into the system. The checkbox will print out on the custom letter and be available for marking.

10. Q: Once letters have been processed and mailed out, is there a way to create an entry under parent Notifications (in RTIm Direct for an Intervention) for all the students that the letter was processed for?

A: Currently there is no direct link between the letters that are processed and an automatic entry being made for an intervention or a student within RTIm Direct. To create an entry under the Parent Notifications section of an intervention, you must edit each intervention separately to add that item.

11. Q: How do you insert a signature that is not a merge field (such as a jpeg of an actual signature) in a custom letter?

A: When editing the letter, simply copy/paste or insert the jpeg/signature where you want it within the letter. Save the custom letter and upload it following the directions described in Online Help.

12. Q: Which users/staff see the custom letters created?

A: The users/staff able to see or generate a custom letter are decided when you upload the custom letter. Be sure to set the permission levels on the left side of the Edit Letter Settings screen when uploading. If you do not select any permission levels on the Edit Letter Settings screen, no one will be able to process the letter.

13. Q: Is it possible to create a custom label?

A: Yes, you may use one of the built-in mailing labels to further customize or create your own using the merge fields.

14. Q: Is it possible to add items from an IEP or 504 Plan, like the program modifications, to a custom letter? Are the program modifications from a document part of the merge fields file?

A: At this time, the program modifications items on an IEP or 504 Plan are not part of the merge fields. We will consider this for a future enhancement.

Creating Custom Letter using a Centris Built-in Letter:

1. Q: How do users set a custom letter to be a PWN (Prior Written Notice)?

A: Once the custom letter has been uploaded to the Manage Letters screen, you may set the custom letter to be the default letter, if you wish. To set the PWN custom letter as the default, click the Prior Written Notice Types link under the Prior Written Notice section of Maintenance. Then click the Letters button to reset the default radio button to the letter you want.

2. Q: Is it possible to make changes to the letters that are automatically linked by Centris?

A: Yes, users may download the template for the letter, add any text or make revisions and save it as a new letter. Users would then upload the revised letter as a new letter under Manage Letters. You may then set the custom letter to be the default letter, if you wish. To set the invitation custom letter as the default, click the Meetings or Agreement Reasons link under the Letter Setup section in Maintenance. Then click the Letters button to reset the default radio button to the letter you want. To set the PWN custom letter as the default, click the Prior Written Notice Types link under the Prior Written Notice section of Maintenance. Then click the Letters button to reset the default radio button to the letter you want.

3. Q: What is the highest release version of word can you use to create a custom letter?

A: Users may save their custom letters using Word 2010 or 2013. Most of the built-in letters were created using Word 97-2003.

Merge Fields:

1. Q: Is there an explanation or key to all of the merge fields available in each product?

A: This is not currently available.

2. Q: Can users insert both document merge fields and demographic merge fields into one document?

A: yes. Users should use the merge fields from one file first and then choose Select Recipients and then click Use an Existing File. You can then browse for and select the other merge field file you saved. Now, you can click the Insert Merge Field drop down to insert a merge field from the other file. Also, all the merge fields contained in the Demographic Merge Field file are contained in the Document Merge Field file. Be sure to choose "IEP Direct – Document Merge Data" on the Upload New Merge Letter page as the Merge Letter Data File used to build this report.

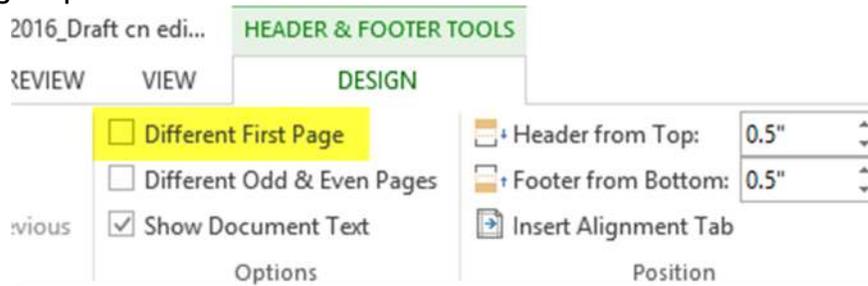
3. **Q: When customizing a letter, will the merge fields automatically populate under the Mailings tab in the Word ribbon or do you have to insert the merge fields csv file?**
 A: No, the merge fields will not automatically populate under the Mailings tab in the Word ribbon for a document. Users must download and save the merge field file to their dedicated folder for custom letters first. Then, once the word document is open, click the Mailings tab on the Word ribbon and choose Select Recipients and then click Use an Existing File. You can then browse for and select the merge field file you saved. Now, you can click the Insert Merge Field drop down to insert a merge field.

4. **Q: Is it possible to sort the merge field into alphabetical order?**
 A: We do not recommend that users sort or re-organize the merge field file which is a csv file.

5. **Q: Has the merge field document file been updated at all? Should users re-download that merge field file periodically to ensure they have the most accurate fields?**
 A: Yes, Centris Group periodically updates and adds merge fields to the file available under Manage Letters. Users should download the merge field file when you are preparing to customize a letter so you have the latest version available.

Creating a Custom Letter using district/agency letterhead or graphics:

1. **Q: Can users delete a custom letterhead from the second page of letter when creating a custom letter?**
 A: Yes. Double click your cursor in the header portion of the second page of your custom letter; this will enable the Header/Footer tools in the Design section of the Word ribbon at the top. Click the “different first page” option as see below:



This will remove the letterhead/logo from the second page.

2. **Q: Can district/agencies use their own header when creating a custom letter?**
 A: Yes. When using a built-in Centris Group letter to make your custom letter, be sure to delete the built-in letterhead/merge fields before saving the revised letter to upload.