

Overview

Purpose: Letters & Reports provides the ability to generate letters and reports without having to go to another application.

Features and Benefits:

- Spanish Letters Available
- Custom Letters May Be Uploaded
- Duplex Printing is Available
- Letterhead and Signatures are customizable

Key Facts:

- **Filters:** The option to view all letters and report is available. Alternatively, you may filter the letters and reports selection by Category or Type.
- **Student Selection:** Most letters and reports may be generated for one student or a group of students.
- **Custom Letters:** Custom letters (templates) may be uploaded into RTImDirect for future use. Demographic fields are available for inclusion in custom letters.
- **Report Prompt Pages:** Reports have prompt pages which lets you modify the report to your needs.
- **Processing Center:** Reports are kept in the Report Processing Center for three days. This allows you to view the report at a later time without having to generate the report again.
- **Viewing Letters and Reports:** You may select which letters and reports to display in Letters and Reports. In addition, you may select which letters or reports display for each permission level.

Step-by-Step Guide

Selecting and Processing a Letter:

1. On the My Students screen, place a check next to the students' names for which you wish to generate a letter.
2. Click Letters & Reports.
3. To change the defaults or filter the selections that display, follow one or more of these instructions:
 - a. To filter and display a specific committee's letters (All, AIS, RTI), click the Category drop down menu on the right side of the screen, near the Process button.
 - b. To filter for Spanish letters, click the Language drop down on right side of the screen.
 - c. To filter for particular types (All, Letters or Reports); click the Type drop down on the right side of the screen.
 - d. To change the Letterhead and/or the Signature on the letter(s), click the drop down(s) on the left side, above the list of available letters and reports.
4. Select the desired letter by placing a check in the box to the left of the letter name. You may select up to five different letters.
5. To generate the letter(s), click Process.
6. Once processed, click the preview button to display the letter. If desired, click File>Save As to save a version to your own computer for later use or archiving.

Selecting and Processing a Report:

1. To change the defaults or filter the selections that display, follow one or more of these instructions:
 - a. To filter and display a specific committee's reports (All, AIS, RTI), click the Category drop down menu on the right side of the screen, near the Process button.
 - b. To filter for particular types (All, Letters or Reports); click the Type drop down on the right side of the screen.
 - c. To change the Letterhead and/or the Signature on the letter(s), click the drop down on the left side, above the list of available letters and reports.
2. Select the desired report by placing a check in the box to the left of the report name.
 - a. If a selected report is available in Duplex Printing format, the Duplex Format button (located next to Process) enables.
 - i. If Duplex Format is desired, click the Duplex Format button to process the selected reports.

NOTE: Any letters or reports not available in Duplex Format will print normally.

- ii. A pop-up message displays. Click Continue or Cancel to proceed.
3. Click Process to generate the selected report(s).
4. Click the PDF icon to review and print the report. If more than one student was selected, on the preview screen, click Show All button at the top of the screen to see and print all; click Next at the top of the screen to see and print the next student.
 - a. The print button may be on a hover bar at the bottom of the page, depending on the version of Adobe you have on your machine.

NOTE: Reports are available to reprint for up to 3 days without having to process again. Click on the Letters & Reports tab and then click the link “Processing Center” located at the top of the screen. Then, click the PDF icon to view and print the item again.

To Manage Letters:

1. Click on Maintenance and then within Administrative Functions, click the Manage Letters link.
2. To filter for a particular letter type, click the Letter Type filter drop down on the right side of the screen at the top of all displayed items. Select All, General, or Invitation. The items display according to the selection.
3. To view the permission groups designated to generate a letter, hover the cursor over the name of the letter. The permission groups display in a pop-up.
4. To hide a letter on the Letters & Reports screen:
 - a. from being visible to ALL users—click the checkbox in the last column on the right of the screen. This hides it from the Letters & Reports screen. If you need to make it visible again, click the checkbox again.
 - b. from being visible to a particular permission group—click on the edit pencil for the letter, located on the far right side of the screen. On the edit screen, uncheck the permission level on the left side that you no longer want to have access to the letter. Click Save.
5. To delete a custom letter:
 - a. Click the delete X in front of the desired item name.

NOTE: Only custom-made letters may be deleted. Custom-made letters are denoted with a green button in front of the name.

6. To provide a particular permission group with access to the letter, click the edit pencil for the letter, located on the far right side of the screen. On the edit screen, check the permission level on the left side that you want to have access. Click Save.
7. Click Save to save any changes made on this screen.

Troubleshooting

- **Selection Limit:** No more than five letters may be selected to process at one time. If you exceed the selection limit, you will receive a message informing you that too many letters were selected. There is no limit on the number of reports that may be processed at one time.
- **No Student Selected:** If no student is selected, you will receive a message to return to the My Students screen and select students.
- **Changing Signature:** If you wish to have a different signature print on a letter, change the value in the Signature dropdown. If the signature you need is not in the dropdown, the signature will need to be added to the Signature link in Maintenance.
- **Missing Letter or Report:** If a letter or report is missing, make sure that the letter or report is checked to show in Maintenance.

Summary

RTImDirect provides districts with a set of built-in invitations, notices, forms, and reports to generate. In addition, Districts may also create custom letters to fit their specific needs.