



# SMS | Mail Merge Quick Reference

## (Parent Forms and Registers)

### Before you begin, you will need the following:

- **Access to SMS documentation:** LAUSD Home > Offices > Pupil Services > Log in as needed > Educators > Saturday Makeup School - <https://achieve.lausd.net/Page/15639> > Download forms
  - Authorization to Participate Form (parent form)
  - School Attendance Register (session roster)
- Spreadsheet of students with absences eligible for SMS program
- Microsoft Word

<p><b>Open Microsoft Word</b></p> <p>Establish file the data is being merged to</p>	<ul style="list-style-type: none"> <li>➤ <b>Open corresponding form</b> Save As file based on SMS session date</li> <li>➤ <b>Launch Mail Merge Wizard</b> Mailings&gt;Start Mail Merge&gt;Step-By-Step Wizard</li> <li>➤ <b>Document Type</b> Letters&gt;Next&gt;Use Current Document&gt;Next</li> </ul>
<p><b>Identify Data Source</b></p> <p>Identify where the merge information is coming from and edit record data</p>	<ul style="list-style-type: none"> <li>➤ <b>Recipients</b> Use an existing list&gt;Browse</li> <li>➤ <b>Locate spreadsheet file</b> Open&gt;OK&gt;Edit recipient list&gt;OK&gt;Next</li> </ul>
<p><b>Insert Merge Fields and Edit Form Template</b></p> <p>Place column names in the appropriate place and edit template</p>	<ul style="list-style-type: none"> <li>➤ <b>Insert first merge field</b> Place cursor at field location&gt;Mailings&gt;Insert Merge Field</li> <li>➤ <b>Insert next merge field</b> See above step&gt;Repeat as needed for each merge field</li> <li>➤ <b>Edit document as needed</b> Add fields or address block, etc. &gt;Next</li> </ul>
<p><b>Preview Forms</b></p> <p>Preview form sample with merged data</p>	<ul style="list-style-type: none"> <li>➤ <b>Recipient</b> use chevrons to scroll through sample forms</li> <li>➤ <b>Edit</b> Return to edit data source</li> <li>➤ <b>Exclude</b> Removes displayed recipient from final merge</li> <li>➤ <b>Next</b></li> </ul>
<p><b>Complete Merge</b></p> <p>Allows you to save merged data to document as a new file</p>	<ul style="list-style-type: none"> <li>➤ <b>Edit Individual Letters</b> Allows changes to individual forms before Save As</li> <li>➤ <b>Merge to Document</b> All recipients, Current recipient, or sequential Range of recipients&gt;OK</li> <li>➤ <b>Save As</b> Name file for merged forms</li> </ul>
<p><b>MiSiS Website</b></p> <p>Where to go for job aids, FAQ's, video clips and other training materials</p>	<p><b>Website:</b> <a href="http://misis.lausd.net">http://misis.lausd.net</a></p> <ul style="list-style-type: none"> <li>➤ <b>System Access and Login</b></li> <li>➤ <b>Resources by Module</b></li> <li>➤ <b>Job Aids and Video Clips</b></li> <li>➤ <b>MiSiS Updates and Known Issues</b></li> </ul>
<p><b>Helpdesk Support</b></p> <p>Visit the MiSiS Website or contact a Helpdesk agent for support</p>	<p><b>Website:</b> <a href="http://achieve.lausd.net/helpdesk">http://achieve.lausd.net/helpdesk</a></p> <ul style="list-style-type: none"> <li>➤ Call: (213) 241-5200, Option 5</li> <li>➤ Create an Online Service Ticket: <a href="http://helpdesk.lausd.net">helpdesk.lausd.net</a></li> <li>➤ Chat with a live service technician:</li> <li>➤ <a href="http://achieve.lausd.net/site/Default.aspx?PageID=1094">http://achieve.lausd.net/site/Default.aspx?PageID=1094</a></li> <li>➤ Frequently asked questions: <a href="http://achieve.lausd.net/Page/285">http://achieve.lausd.net/Page/285</a></li> </ul> <p>Hours of Operation: 7:45 a.m. – 4:45 p.m.</p>