Instructions for Using Microsoft Word Mail Merge and OPAL Exports to Approve and Deny Open Enrollment Applications

Step 2: Create the Templates

There are three steps for preparing approval and denial letters using a Microsoft Word mail merge with data exported from OPAL.

Step 1: Export the Data <u>Step 2: Create the Templates</u> Step 3: Prepare the Letters Using Mail Merge

Basic Steps for Creating the Templates

The basic steps for creating your own letter templates for approvals and denials are:

- 1. Sign into OPAL.
- 2. Go the the <u>Exports</u> tab.
- 3. Download the appropriate letter template from OPAL.
- 4. Match the template to the export file you created in Step 1 (each letter will have a number, such as L101, that corresponds to an export file with the same number).
- 5. Make your desired changes.
- 6. Save as your own template.

Following is a list of the export files, the matching letter templates and the page on this document where the instructions are located:

Name of Export File	Name of Letter Template	Page
Resident Approvals L101	L101 Resident District Approval Letter	2
Resident Denials L102	L102 Resident District Denial letter—Reg and Alt Apps	11
Nonresident Approvals and School Assignments L103	L103 Nonresident District Approval and School Assignment	24
	letter	
Nonresident Denials L104	L104 Nonresident District Denial letter	34
Alternative App Nonresident Approvals and School	L105 Nonresident District Alt App Approval and School	24
Assignments L105	Assignment	
Alternative App Nonresident Denials L106	L106 Nonresident District Alt App Denial letter	34

Creating the Template for Resident School District Approvals

1. From the <u>Exports</u> page, select and click on letter <u>L101 Resident District Approval Letter</u>.

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2. You may get a page asking if you want to merge this document into another document. If so, click "No."

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3. Open the letter.

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4. Click on <u>Mailings</u>, <u>Select Recipients</u> and <u>Use Existing List</u>.

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(If you prefer, you may click on <u>Start Mail Merge</u> and use the <u>Step by Step Mail Merge Wizard</u> rather than these instructions.)

5. Find the location on your computer where you stored your export file (in Step 1). Select and click on <u>Resident Approvals L101</u>.

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7. Click on <u>Preview Results</u>.

Note that now you have matched the letter to the data, other fields are highlighted. If these additional fields are not highlighted, your letter is not matched to your data.

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	Belinda Sugar 1582 Hillside Rd Rhinelander, WI 54501	
- - - - -	Your application for Sarah Sugar to transfer out of the Rhinelander School District into the Grantsburg School District under the open enrollment program has been approved by the Rhinelander School District for the 2014- 2015 school year.	
	This notice does not constitute approval of the Grantsburg School District, nor does it commit the Grantsburg School District to approve the application.	
- -	lfyou have additional questions about this notice, please contact Roger Erdahl at (715) 365-9750 or walkojan@rhinelander.k12.wi.us.	
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- 8. Make any needed changes to the document, such as:
 - Contact information.
 - Name or title of person who signs the letter.
 - Insert digitized signature.
 - Put on your own letterhead.
- 9. Once you have completed your template, unclick <u>Preview Results</u>. Click on the Windows icon and Save As.

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10. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish and Save it. Although it is not necessary to have separate resident approval letters for regular and alternative applications, if you wish to create separate letters from the template, you may do so.

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You are now ready to prepare your letters in Step 3.

Step 1: Export the Data Step 2: Create the Templates <u>Step 3: Prepare the Letters Using Mail Merge</u>

Return to the OPAL Exports page and click on the link to the Step 2 instructions or go directly to <u>http://www.oe.dpi.wi.gov/opal/appr_deny_step3</u>.

Creating the Template for Resident School District Denials

1. From the Exports page, select and click on letter L102 Resident District Denial letter-Reg and Alt Apps

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2. You may get a page asking if you want to merge this document into another document. If so, click "No."



3. Open the letter. Notice that the letter contains all possible reasons for a resident school district to deny open enrollment.

It is recommended that you save a "basic" template with all the reasons for denial. You can then decide whether you want to create individual templates for individual reasons for denial.

It is probably most efficient to create separate templates, as follows (this will be done in a later step):

- One for denials due to "undue financial burden."
- One for 4K denials, if your district does not offer 4K.
- One that contains all other reasons, which may then be altered as necessary for individual pupil denials.



4. Click on <u>Mailings</u>, <u>Select Recipients</u> and <u>Use Existing List</u>.

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	Your application for «student_full_name_fnf# to transfer ou the «nonresident_district_name» School District under the « «resident_district_name» School District for the «school_ye» the following reason(s):	t of the «resident_district_name» School D open enrollment program has been denied ar_full» school year. The application was d	istrict into by the enied for	=
• • • •	The resident school board of the «resident_district_nar the special education and related services required in t proposed to be implemented by the «nonresident_dist financial burden on the «resident_district_name» Scho	me» School District has determined that th he child's individualized education program rict_name» School District would impose a ol District. [Wis. Stats. § 118.51 (12) (b)]	e cost of n (IEP), as n undue	
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с. 	116.51 (3) and Wis. Admin. Code § Pi 36.03 (1) (0) 1.] The child's resident school district, «resident_district_n prekindergarten, 4-year-old kindergarten, early childh requested in the «nonresident_district_name» School prekindergarten, 4-year-old kindergarten, early childh offered in the «nonresident_district_name» School Dis The child has not reached the age required under Wis.	ame» School District, does not offer the sa cod, or school-operated day care program i District or the child is not eligibile for that cod, or school-operated day care program i trict. [Wis. Stats. § 118.51 (2)] Stats. § 118.14 for school attendance; or th	me type of hat is hat is He applicant	
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Г.	The criteria relied upon to submit the application unde to the pupil. [Wis. Stats. § 118.51 (3m) (d) 1.] If you have additional questions about this notice, please co «res_oe_email».	r the alternative application procedure doe ntact «res_oe_coordinator» at «res_oe_ph	s not apply one= or	* • •
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(If you prefer, you may click on <u>Start Mail Merge</u> and use the <u>Step by Step Mail Merge Wizard</u> rather than these instructions.)

5. Find the location on your computer where you stored your export file (in Step 1). Select and click on <u>Resident Denials L102</u>.

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6. Select the file and click "OK".

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7. Click on <u>Preview Results</u>.

Note that now you have matched the letter to the data, other fields are highlighted. If these additional fields are not highlighted, your letter is not matched to your data.

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- 8. Make any needed changes to the document, such as:
 - Contact information.
 - Name or title of person who signs the letter.
 - Insert digitized signature.
 - Put on your own letterhead.
 - Do not make any changes to the appeal notice!

Do not make any changes to the reasons for denial quite yet. You can do this in a later step.

9. Once you have made these basic changes, unclick <u>Preview Results</u>. Click on the Windows icon and Save As.



10. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish and Save it. It is recommended to name it something like "Basic Resident Denial letter template."

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Keep the letter open after you have saved it.

11. To create a separate template for "undue financial burden," delete all the reasons for denial except "undue financial burden."



12. Your letter now contains only one reason for denial.

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13. Click on the Windows symbol and Save As.



14. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish to give it and Save it.

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15. If you wish to create other separate templates for specific denial reasons, repeat steps 11 through 14.

You are now ready to prepare your letters in Step 3.

Step 1: Export the Data Step 2: Create the Templates Step 3: Prepare the Letters Using Mail Merge

Return to the OPAL Exports page and click on the link to the Step 2 instructions or go directly to <u>http://www.oe.dpi.wi.gov/opal/appr_deny_step3</u>.

Creating the Templates for Nonresident School District Approvals and School Assignments

1. From the <u>Exports</u> page, select and click on letter <u>L103 Nonresident District Approval and School</u> <u>Assignment letter</u>.

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		You MUST respond to this letter on or before «date_to_notify_if_attending» to guarantee the open enrollment. If this	
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4. Click on <u>Mailings</u>, <u>Select Recipients</u> and <u>Use Existing List</u>.

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(If you prefer, you may click on <u>Start Mail Merge</u> and use the <u>Step by Step Mail Merge Wizard</u> rather than these instructions.)

5. Find the location on your computer where you stored your export file (in Step 1). Select and click on Nonresident Approvals and School Assignments L103.



6. Select the file and click "OK."

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7. Click on <u>Preview Results</u>.

Note that now you have matched the letter to the data, other fields are highlighted. If these additional fields are not highlighted, your letter is not matched to your data.

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	Bob Basil 814 Davenport St Phinelander WI 54501	Î
	Your application for Josie Basil to transfer into the Rhinelander School District under the open enrollment program has been approved by the Rhinelander School District for the 2014-2015 school year. Josie is assigned to the following school:	
	Name of School: Northwoods Community Secondary School School Start Date: 09/02/14 Additional information: Mrs. Smith's homeroom	-
m - -	You are required to notify the Rhinelander School District on or before 06/27/14. Please fill out the bottom of this form and send it by mail, fax or email, or notify the district by phone. Please note:	_
4	 This notice does not constitute approval of the Antigo Unified School District, nor does it commit the Antigo Unified School District to approve the application. If your application is approved by both districts, prior to beginning attendance in the nonresident district, you must register your child in your resident district. If your child has not attended the Rhinelander School District on or before 09/19/14, this approval is void. 	
- - - - -	If you have any questions, please phone or email the Contact Person named below. Roger Erdahl	
:	District Administrator	*
Page: 1 of 1 W	ords: 302 English (U.S.)	• •
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- 8. Make any needed changes to the document, such as:
 - Contact information.
 - Name or title of person who signs the letter.
 - Insert digitized signature.
 - Put on your own letterhead.

9. Once you have completed your template, unclick <u>Preview Results</u>. Click on the Windows icon and Save As.

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10. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish and Save it.

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11. If you wish, repeat this procedure for <u>L105 Nonresident District Alt App Approval and School Assignment</u>. The main difference between the regular and alternative approval and school assignment letter is that a number of fields must be filled in manually, due to the fact that a pupil may begin attending the nonresident district at any time during the school year.

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	enrollment program has been approved by the «nonresident_district_name» School District for the «school_year_full» school year. «student_first_name» is assigned to the following school:	Î
-	Name of School:«school_assign_name»Date Pupil May Begin to Attend:[Date Entered by School District]Date by Which Pupil Must Attend:[Date Entered by School District]	
- - - -	You are required to notify the «nonresident_district_name» School District on or before [Date Entered by School District]. Please fill out the bottom of this form and send it by mail, fax or email, or notify the district by phone. Please note:	
	This notice does not constitute approval of the «resident_district_name» School District, nor does it commit the If your child has not attended the «nonresident_district_name» School District on or before [Date Entered by School District], this approval is void.	=
- - - - - -	«nonres_district_admin_name» District Administrator	
· · ·	You MUST respond to this letter on or before [Date Entered by School District] to guarantee the open enrollment. If this notification is not provided by the required date, the pupil may not be able to attend «school_assign_name».	
· · · · · · · · · · · · · · · · · · ·	Will attend «school_assign_name» for the school year of «school_year_full». Will not attend «school_assign_name» for the school year of «school_year_full». Signature of Parent or Guardian (or pupil if 18 years or older: Date Signed:	1 0 7
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You are now ready to prepare your letters in Step 3.

Step 1: Export the Data Step 2: Create the Templates <u>Step 3: Prepare the Letters Using Mail Merge</u>

Return to the OPAL Exports page and click on the link to the Step 2 instructions or go directly to <u>http://www.oe.dpi.wi.gov/opal/appr_deny_step3</u>.

Creating the Templates for Nonresident District Denials

1. From the <u>Exports</u> page, select and click on letter <u>L104 Nonresident District Denial letter</u>.

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2. You may get a page asking if you want to merge this document into another document. If so, click "No."



3. Open the letter. Notice that the letter contains all possible reasons for a nonresident district to deny open enrollment.

It is recommended that you save a "basic" template with all the reasons for denial. You can then decide whether you want to create individual templates for individual reasons for denial.

It is probably most efficient to create separate templates, as follows (this will be done in a later step):

- One for denials due to regular education space (select the sentence indicating whether you have a waiting list).
- One for denials due to special education space (select the sentence indicating whether you have a wait list).
- One that contains all other reasons, which may then be altered as necessary for individual pupil denials.



Note that the sentence stating that you have a wait list has a field for the waiting list number. You will insert the waiting list number when you prepare the actual letter.

4. Click on <u>Mailings</u>, <u>Select Recipients</u> and <u>Use Existing List</u>.

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(If you prefer, you may click on <u>Start Mail Merge</u> and use the <u>Step by Step Mail Merge Wizard</u> rather than these instructions. However, once you have matched the export file to the letter, go to page 39 to continue.)

5. Find the location on your computer where you stored your export file (in Step 1). Select and click on <u>Nonresident Denials L104</u>.

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6. Select the file and click "OK."

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7. Click on <u>Preview Results</u>.

Note that now you have matched the letter to the data, other fields are highlighted. If these additional fields are not highlighted, your letter is not matched to your data.

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- 8. Make any needed changes to the document, such as:
 - Contact information.
 - Name or title of person who signs the letter.
 - Insert digitized signature.
 - Put on your own letterhead.
 - Do not make any changes to the appeal notice!

Do not make any changes to the reasons for denial quite yet. You can do this in a later step.

9. Once you have made these basic changes, unclick <u>Preview Results</u>. Click on the Windows icon and Save As.



10. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish and Save it. It is recommended to name it something like "Basic Nonresident Denial letter template."

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Keep the letter open after you have saved it.

11. To create a template for a regular education space denial, delete all the reasons for denial except regular education space. Select the appropriate sentence concerning a waiting list.

There are two ways to enter a pupil's waiting list number. You can add each pupil's number to the export spreadsheet (instructions will be given in Step 3) or you can type the number in each pupil's letter manually and individually. Although you don't need to decide this right now, if you know you will want to insert the number manually, you can delete the merge field (<<reg_waiting_list_number>>) and replace it with a space or a line.

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	Your application f the open enrollm «school_year_ful Regular ed «nonreside	or «student_full_name_fnf» to tra ent program has been denied by t l» for the following reason(s): ucation space is not available in th ent_district_name» School District	nsfer into the «nonresident_ he «nonresident_district_nar e schools, programs, classes . [Wis. Stats. § 118.51 (5) (a)	district_name» School I ne» School District for f or grades in the 1.]	District under the								
- - -	one «non var waiti	One «nonresident_district_name» School District does not have a waiting list.											
- - - 4	Space is no education «non	t available in the special education program (IEP). [Wis. Stats. § 118.5 resident_district_name» School D	n or related services required 1 (5) (a) 4.] istrict does not have a waitin	d in your child's individ g list.	lualized								
	Your waiti The specia	child has been placed on a waiting ng list for the special education or leducation or related services rec	list and is currently number related service(s) required in wired in your child's individu	«reg_waiting_list_nur hthe IEP.	nber» on the								
- - - -	not availab Your child been evalu	le in the «in president_distriction has been reterred to you fre iden ated by an individualized educatio	ime - School District - Wis. t ; sc ool oard board or a p in program (IEP) team. [Wis.	ats. § 118.51 (5) (a) 4.] eci II e ucatic , but ha Stats. § 118.51 (5) (a)	as not yet 6.]								
	Your child «school_y Your child for one of	s currently expelled from a public ear_full» school year. nas been expelled from a public so the following reasons, or a discipli	school district and the term hool district during the curre nary proceeding based on on	of the expulsion exter ent or two preceding so the of the following reas	nds into the chool years sons is		* ± •						
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12. Your letter now contains only one reason for denial.

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		«parent_full_ «parent_full	_name» _name2»									Î
	«mailing_address» «mailing_city», «mailing_state» «mailing_zip» Your application for «student_full_name_fnf» to transfer into the «nonresident_district_name» School District under											
-	the open enrollment program has been denied by the «nonresident_district_name»School District for the «school_year_full» for the following reason(s): Regular education space is not available in the schools, programs, classes or grades in the «nonresident_district_name» School District. [Wis. Stats. § 118.51 (5) (a) 1.]											
· ·	Your child has been placed on a waiting list and is currently number «reg_waiting_list_number» on the waiting list for her or his grade.											
4.	If you have additional questions about this notice, please contact «nonres_oe_coordinator» at «nonres_oe_phone» or «nonres_oe_email».											
-	«nonres_district_admin_name» District Administrator								Ţ			
· • •	You may appeal this denial to the Department of Public Instruction within 30 days of the date this notice is									2 0 7		
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13. Click on the Windows symbol and Save As.



14. Go to the location on your computer where you want to store your letter templates. Give the template the name you wish to give it and Save it.

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15. If you wish to create other separate templates for specific denial reasons, repeat steps 11 through 14.

- 16. If you wish, repeat this procedure for <u>L106 Nonresident District Alt App Denial</u>. The difference between the denial letters for regular applications and alternative applications are:
 - The alternative application letter contains two additional reasons for denial.
 - The alternative application letter does not contain appeal information.

You are now ready to prepare your letters in Step 3.

Step 1: Export the Data Step 2: Create the Templates Step 3: Prepare the Letters Using Mail Merge

Return to the OPAL Exports page and click on the link to the Step 2 instructions or go directly to <u>http://www.oe.dpi.wi.gov/opal/appr_deny_step3</u>.