

PARENT / CARER CLAIM FORM

How to mail merge your family data to pre-populate the form

- 1. Download Part 2 and save
- 2. Download Part 3 (a, b, c) and save
- 3. Download Mail Merge excel List and save
- 4. Populate the Mail Merge excel List with the family and funding data (yellow cells) and save
 - Column A = is the email address that you have consent to communicate with families. It does not need to be populated if you distribute your forms by hand.
 - Remove any blank rows (using the delete row function)
 - IMPORTANT: Some sections on each form will not be populated because these need to be completed/confirmed by the family

Part 2 –

А	В	C	D	E	F	G	Н	1	J	К	L	M
Email Address	Child's Legal Name	Name Child is Known	DOB	Documentation	Address	Gender	Ethnicity	Parent / Carer Legal	Parent / Carer Email	NEO Code	HMRC Code	Parent/Carer NI
								Name	Address			
testaddress@norfolk.gov.uk	Test Name	Test	01/01/20	Birth Certificate	County Hall, Norwich, NR1 2DL	Male	White British	A N Other	other@norfolk.gov.uk	NEO012	5000000001	JA00112233D
				please choose		please choose	please choose					

Part 3 –

A	В	С	D	E	F	G	н	1	J.	К	L	м	N	0	Р	Q	R
Email Address	Child's Legal Name	Provider A	Is Child	Provider B	Provider C	Provider B hours	Provider B hours	Provider B hours	Provider C hours	Provider C hours	Provider C hours	Start Date -	End Date -	Start Date -	End Date -	Start Date -	End Date -
			attending			AUT	SPR	SUM	AUT	SPR	SUM	AUT	AUT	SPR	SPR	SUM	SUM
			another														
			provider(s)?														
testeddross Operfells gewydr	Tost Name	First Drawidar	~	Second Dravider	Third Drawidar	50	50	50	50	50	50	01/00/2025	91/10/2025	01/01/2026	21/02/2026	01/04/2026	21/02/2026
testaduress@norroik.gov.uk	rescindine	riist Plovider	1	Second Provider	inito Plovider							01/05/2025	31/12/2023	01/01/2020	51/05/2020	01/04/2020	51/06/2020
testaddress@norfolk.gov.uk	Test Name	First Provider	Y	Second Provider	Third Provider	50	50	50	50	50	50	01/09/2025	31/12/2025	01/01/2026	31/03/2026	01/04/2026	31/08/2026

5. Open Part 2 (word document)

Sel File	ect Mailings and then Start Mail Merge	Hds ABC Preview Bels
A	Click Select Recipients and Use an Existing List	AutoSorte Con Sorte Conset File Home Inset Draw Design Layout Reference Envelopes Labels create Trave Sorte Reference Recordence Inset
В	Locate your populated Mail Merge List in your folders, select it, and click open Select Part 2, and click ok twice	Select Table — — X Name Description Modified Created Type Select Table — — X Select Table — — — Select Table — — — X Select Table — — — — X
		First (pow of data contains column headers OK Cancel





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6. Distribute Part 2 to you families





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EMAIL (where Adobe Acrobat DC Standard is installed in Microsoft Word)	
1. Open Microsoft Outlook	
 Create a folder where your forms can be saved Create your emails (ensure Outlook is open) Click Merge to Adobe PDF Amend PDFMailer to name the pdf attachment e.g. Autumn 2025 Claim Form Click Automatically send Adobe PDF files by Email To: - select Email Address Add a subject line to your email Add a generic message which will be sent to all families Locate the folder which was created in Step 2, and click ok Click ok, when message states Emails have been sent successfully Be patient! If you are emailing a lot of forms, it will take a little while to collate and send 	Acrobat PDFMaker - Mail Merge Acrobat Acrobat PDFMaker - Mail Merge Acrobat Current OF file name Specify PDF file name: 2024 Claim Form Email options Automatically send Adobe PDF files by Email To: Email Address Email options Automatically send Adobe PDF files by Email To: Email Address Email options OK Cancel Help



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Repeat Steps 5 and 6 for Part 3 selecting the relevant sheet when prompted - 3a,
 3b, or 3c. Please ensure that you check the details that have been populated in the claim form(s) for accuracy before issuing these to families

Top Tips!

- Retain the first record to produce a test record
- Request a pre-populated mail merge list
- Seek consent from families to send via email
- Part 2 to be completed by families when new to claiming the entitlement or their details change
- Part 3 to be completed by families when a new entitlement commences, or if their details change



Need Help!

Call the Advice Line on 01603 222300 Opt 2 or email <u>earlyyearsfinance@norfolk.gov.uk</u>