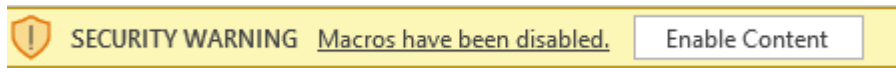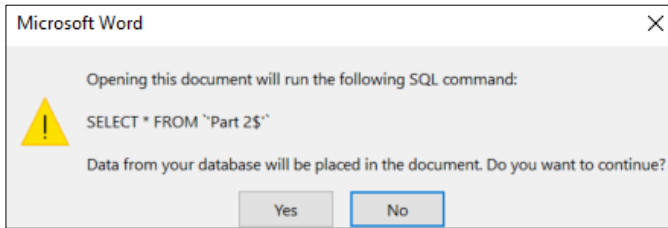Norfolk County Council

PARENT / CARER CLAIM FORM

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

1. Download Excel Mail Merge List and save

2. Download Part 2 Word template, save and close

   When using the mail merge for the first time, click No and Enable Content if this error message appears, otherwise click Yes, then save and close
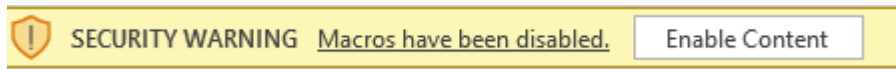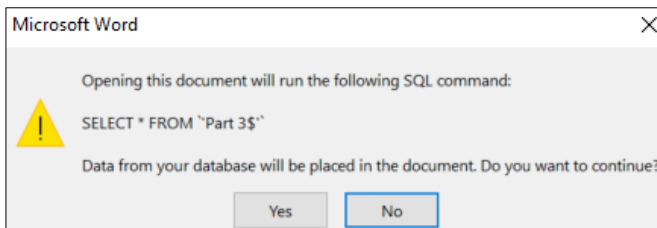

3. Download Part 3 Word template, save and close

   When using the mail merge for the first time, click No and Enable Content if this error message appears, otherwise click Yes, then save and close

4. Populate the Excel Mail Merge 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 –

   Part 3 –

5. Open Part 2 (word document)

PARENT / CARER CLAIM FORM

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

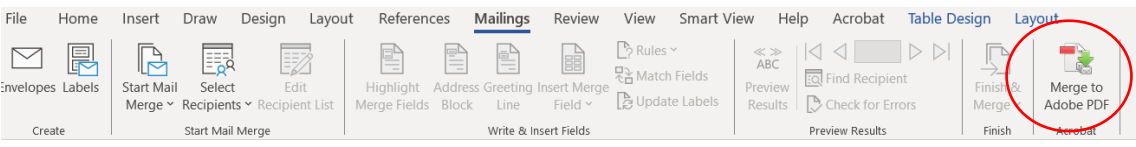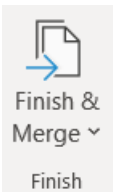|		
Select Mailings and then Start Mail Merge – ensure letters is selected from the drop down		
A	Click Select Recipients and Use an Existing List	
B	Locate your populated Mail Merge List in your folders, select it, and click open Select Part 2, and click ok twice	
C	Click Preview Results and use the arrows to check each form **NB:** Some fields will not be populated because these must be completed by the parent/carer	

6. Distribute Part 2 to your families (by either printing or emailing)

|	
PRINT • Click Finish & Merge • Select Print Documents • Click Ok	

PARENT / CARER CLAIM FORM

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

EMAIL (where Adobe Acrobat DC Standard is installed in Microsoft Word)

1. Open Microsoft Outlook

2. Create a folder where your forms can be saved

3. Create your emails (ensure Outlook is open)
   - Click Merge to Adobe PDF
   - Amend PDFMailer to name the pdf attachment e.g. Summer 2024 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 (watch your Outbox)
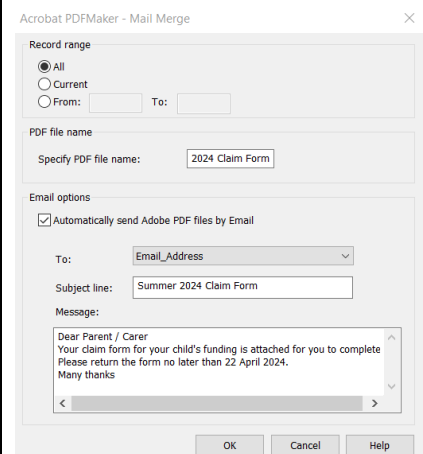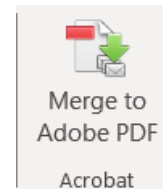
7. Repeat Steps 5 and 6 to distribute Part 3

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 every claim period

Need Help!

Call the Advice Line on 01603 222300 Option 2 or email earlyyearsfinance@norfolk.gov.uk