EVERY CHILD IS A NATIONAL ASSET

SA SAMS
South African School and Administration Management System

MODULE 6

ABC of...
STANDARD LETTERS AND FORMS

basic education
Department:
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REPUBLIC OF SOUTH AFRICA

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General Instructions on using SA-SAMS Manual:

- Click on the **menu option** to open the required screen.
- Click on **Save** to update all capturing.
- Click on **Done** to exit the screen**.**

The following symbols are used in the manual to indicate the required action with every screen:

Background **Information**	Data used in other modules or pre-captured data needed	Options in **drop-down tables**	Screens that require **capturing**	**Printouts and Reports**	Summary and Stats screens

A. INTRODUCTION

1. Purpose of the module

The **Standard Letters and Forms module** (Fig. 1) includes the management of correspondence between the school and standardising and quality assurance of learner and staff details to be captured.

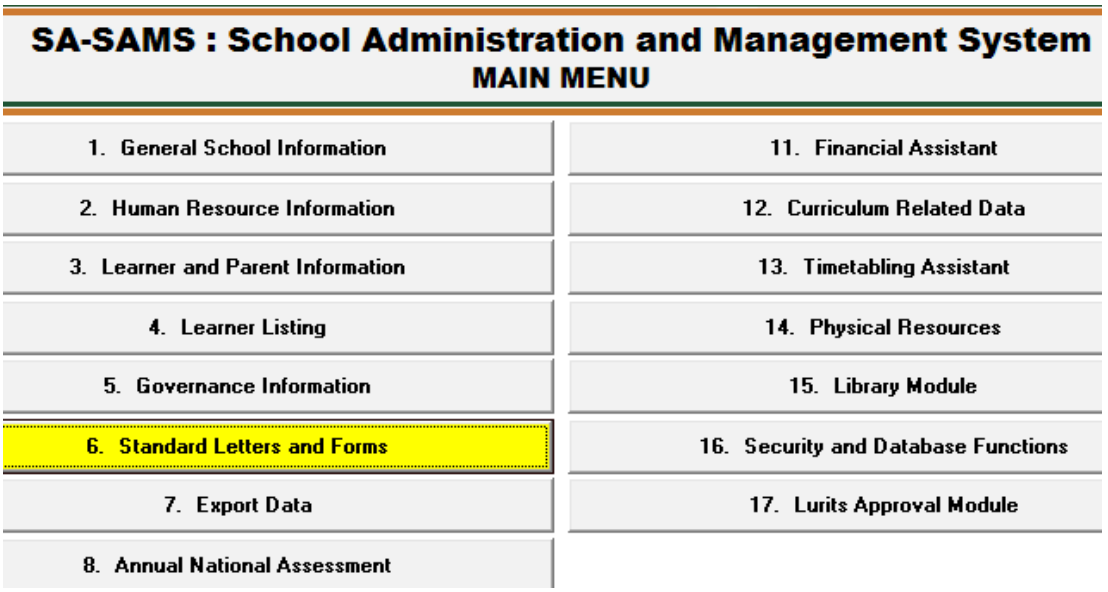


Figure 1: Main Menu

Usage of this Module is dependent on data already being captured in other modules e.g.

Module	Data to be pre-captured (with the associated screen no)
1	School Details (1.1), importing the school logo (1.16) Grades (1.2), Classes (1.3), School Terms (1.6), subjects (1.5) offered by the school
2	Educator Details (2.1) and Staff Details (2.3)
3 or 4	Learner Data (3.1.1), Learners Assigned to Classes (3.1.5) Parent Information (3.1.11) Future Learners (3.1.2)

B. THE COMPONENTS OF THIS MODULE

2. Module 6: Standard Letters and Forms

This module can be divided into 3 sections according to the allocated functions:

- Creation and printing of official letters and labels.
- Printing blank and populated registration forms.
- Exporting of learner and parent contact details.

These sections are tabled below with the associated functionalities and screens that are used in this manual:

Sub-Heading in Manual	Screen	Functionality
2.1 Letters & labels merged with addresses & names	6.1 Standardised Mail Merge Letter	• Create letter / select existing letter (to update or change for new use) • Add letter to recipient group • Merge letters with recipient name & address • Mail merge and find letter in WinWord • Print letters • Print labels with addresses
2.2 Application Forms	6.2 Print Blank Application Forms	Blank registration forms for **Capturing** • Educator • Learner & Parent • Staff
	6.3 Print completed forms	Pre-populated forms for **Verification** • Educator • Learner • Parent • Staff • Future learner
2.3 Learner & Parent Contact Data	6.4 Learner Parent Export	**Print** lists per grade, class or all • with contact data of learner and all parents **Export** lists per grade, class or all • with contact data of learner and all parents

Figure 2 shows all the sub-menus. The functionality and purpose of every component will be discussed separately.

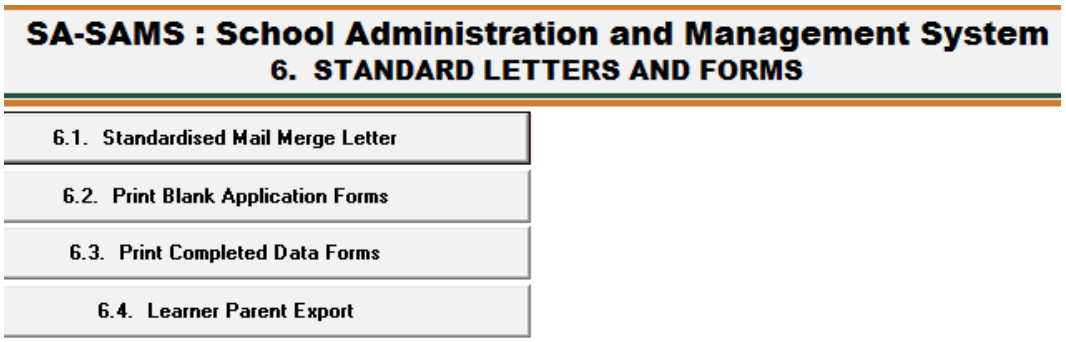


Figure 2: Standard Letters and Forms Menu

2.1 Letters & labels merged with addresses & names (Menu 6.1)

This section assists with creating a **standard letter/ memo** that automatically updates it with the following:

- Letters with school address and logo
- Letters addressed to individuals from a selected group
- Letters can be saved for reference, recalled and updated for new event (e.g. parents day, misconduct notification), used as a standard for other communication.

This section can also **print address labels** from a group as requested.

Click on Standardised Mail Merge Letter to open screen shown as in Figure 3.

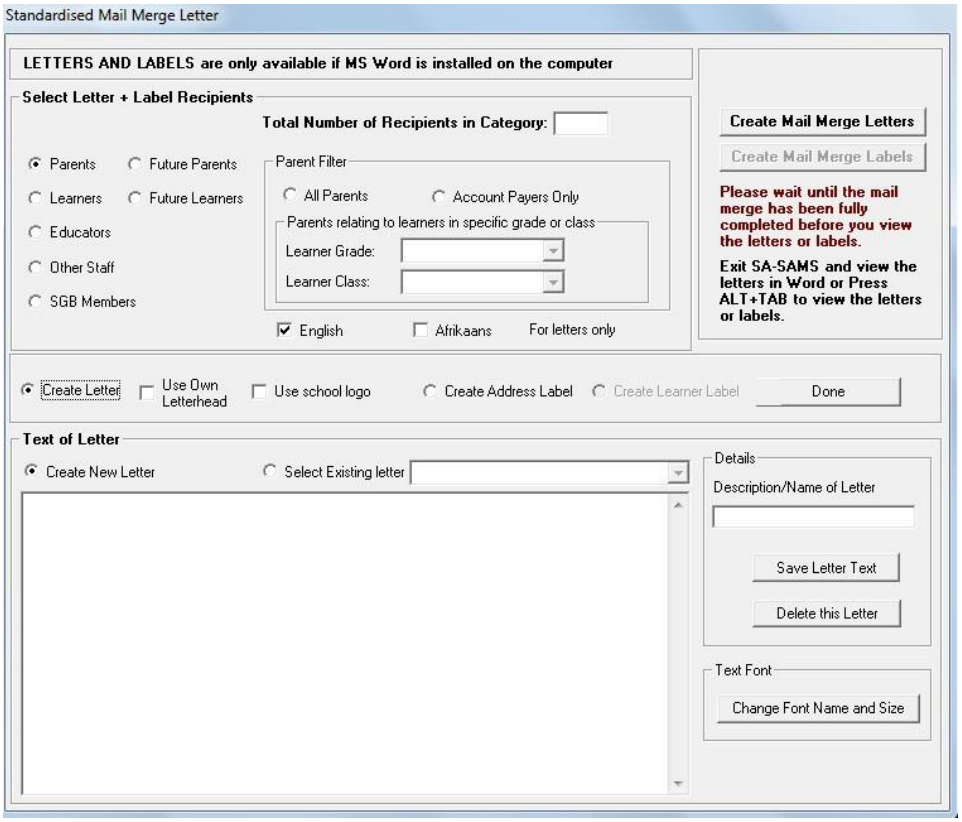


Figure 3: Standardised Mail Merge Letter

2.1.1 Create Address Labels

Address labels can be printed for a class or per grade, for current or future parents and learners. Parents, learners, staff and SGB's address details need to be captured in order to use this function.

Select and tick **Create Address Label** (Fig. 3).

- Select and tick on the group of recipients on the left (Parents, learners etc.)
- Select a grade when using options: parents, learners, future parents and learners.
- Click on **Create Mail Merge Label** to select the settings and the **type and number of labels** on the insert screen. (Fig. 4)
- Click on **Ok** and open **Windows Word** to view the labels. (Fig. 5)
- Click on **Print** in the Windows Word screen.

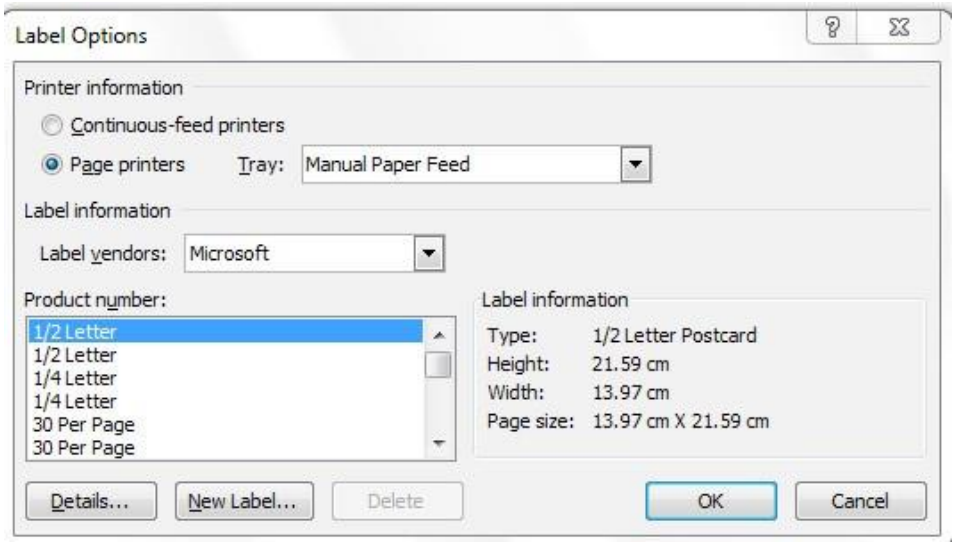


Figure 4: Select Options for Label Printing

Below is an example of a label printout.

Figure 5: Example of a Label Printout.

2.1.2 Mail Merge Letters

This This section assists with creating a **standard letter/ memo** that automatically updates it with the school address and logo and addressed to individuals from a selected group.

Letters can be saved for reference, recalled and updated for new events (e.g. parents day, misconduct notification), used as a standard for other communication.

Parents, learners, staff and SGB's details need to be captured in order to use this function.

Select and tick **Create letter** in order to create a new letter (Fig. 3 & 6).

- Write a name/ description for the letter e.g. Parent Circular 1- 12/2/2013.
- Type the content of the letter or copy and paste content from another source.
    - Click on **change the font and size** to alter the print of the content.
- Click on **Save Letter Text**.

Existing letters can be retrieved by selecting **Select Existing Letters.**

- Click on an existing letter to populate the content.
- Rename the letter, update content and click on **Save Letter Text.**

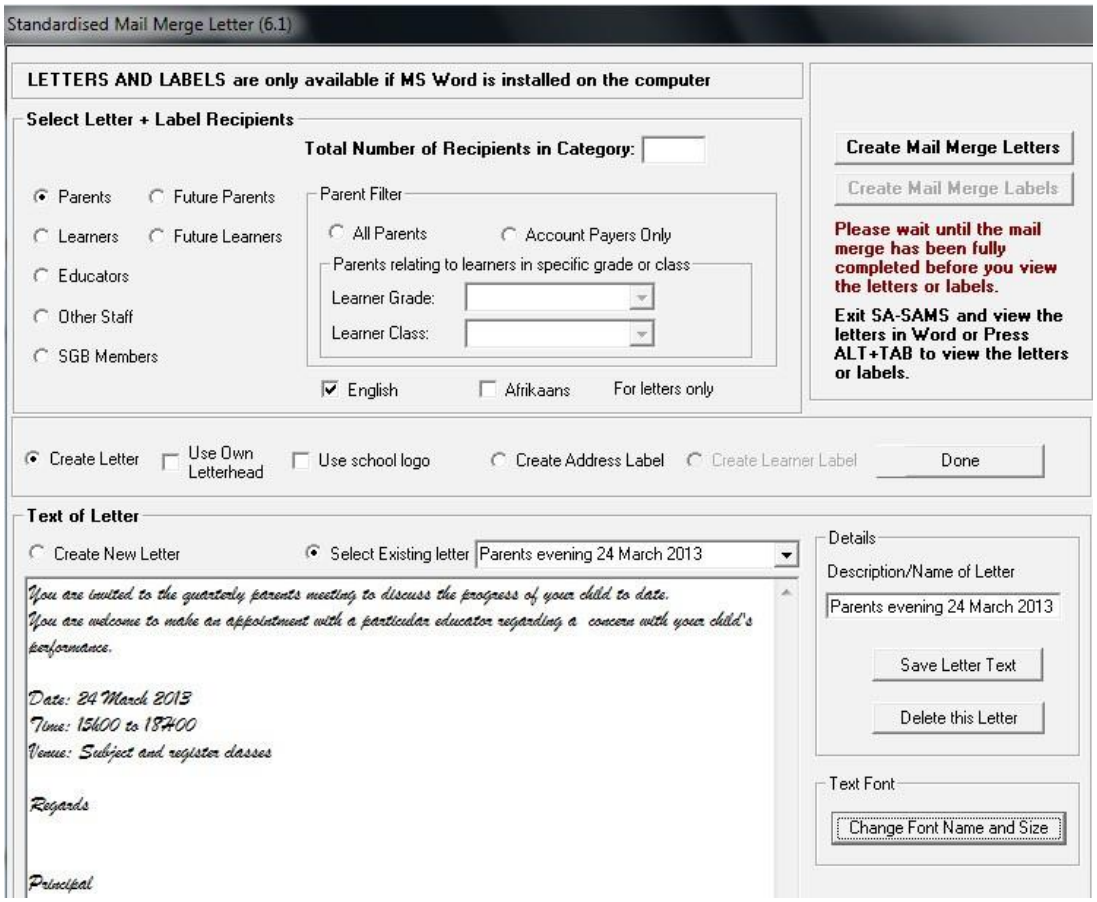


Figure 6: Select Options for Mail Merge Letters

Select the following to edit the letter for printing and to recipients (Fig. 6).

- Select and tick one of the following:

Use own letterhead	• Printing on paper with printed letterheads
Use school logo	• Printing on blank paper
Leave blank	• No letterhead

- Select the group of recipients on the left (Parents, learners etc.)

All Parents	• All registered parents with addresses
Account payers	• Only parents that pay school fees

- Select a grade when using options: parents, learners, future parents and learners.
- Click on **Create Mail Merge Letters.**
- Click on **Ok** and open **Windows Word** to view all the letters. (Fig. 7)
    - Each letter contains the name of the recipient with address.
- The format of the letter can be changed individually in the WinWord screen.
- Click on **Print** in the Windows Word screen to print all the letters.

CLEVER KIDS HIGH SCHOOL
GLEN ROAD Waterkloof Pretoria 0181 Tel: 7441445

Mr AARON
PO Box 222
Pretoria
0001

Learner Name: James SMITH Class: 7A
2013/05/06

Dear Mr AARON

You are invited to the quarterly parents meeting to discuss the progress of your child to date.
You are welcome to make an appointment with a particular educator regarding a concern with your child's performance.
Date: 24 March 2013
Time: 15h00 to 18h00
Venue: Subject and register classes
Regards

Principal

Figure 7: Example of a letter created by Mail Merge Letters

2.2 Application Forms (Menu 6.2 & 6.3)

The registration forms available are compiled according to prescribed policy.

2.2.1 Data on Educators, Staff and Learners/ parents are captured from manually completed registration forms.

- The **original completed forms** are part of the **source documents** that are needed for an **audit trail.**
- These documents must be accompanied by a **certified copy** of the **ID or Birth certificate** and must be **filed in the Learners profile file**.

2.2.2 **Data must be verified at least annually** in order to ensure that the **data is correct** /valid. Schools can print pre-populated forms and send it to the parents, educators and staff for verification. Verified forms must be stored in the learner or staff files as part of the paper audit trail. (QUALITY ASSURANCE PROCESS)

2.2.1 Print Blank Application Forms (Menu 6.2)

The following blank forms are available: (Fig. 8)

- Blank Learner & Parent Application Form
- Blank Educator Form
- Blank Staff Form

Click on **Print Blank Application Forms.**

- Select the form to be printed and click on **Print.** (Fig. 8).
- The **Print Setup** window will open and you can select options or click on **Ok** to continue the Print Preview window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on **printer image** to print a blank registration form.

When finished click on **Done** to exit the screen

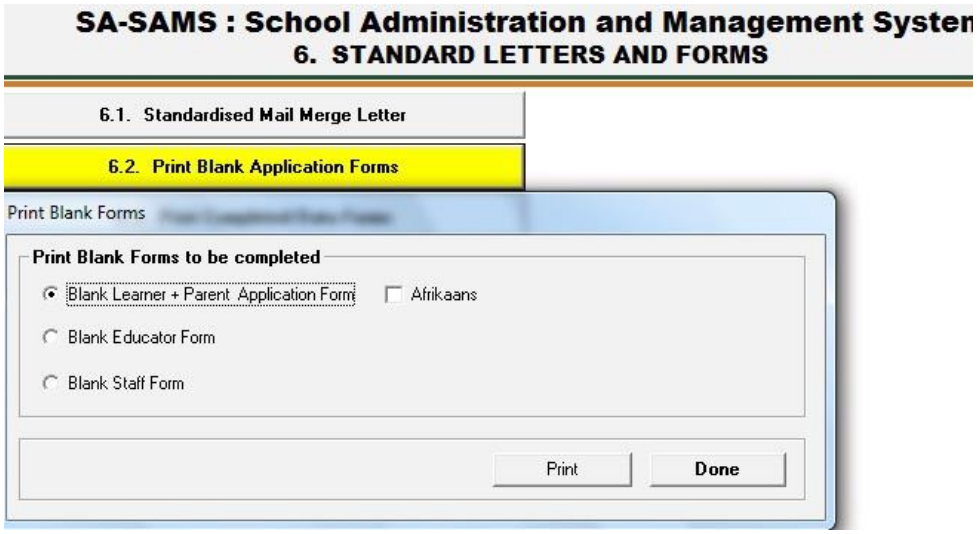


Figure 8: Select Blank Application Form

2.2.2 Print Pre-populated Forms (Menu 6.3)

The following completed forms (forms with captured data) are available: (Fig. 9)

- Learner
- Parent Form
- Educator Form
- Staff Form
- Future Learners

Click on **Print Completed Data Forms** (Fig. 9 & 10).

- **Select the form** to be printed and **choose the following options** to select the printout:

	Per group		Select all	Filter /Specific for individual
Educators	Select by surname (1st letter all)	Print all in Class	Print all on current data list	Select from drop-down list
Staff				
Parents				
Learners				
Future Learners				

Click on **Print.**

- The **Print Setup** window will open and select options or click on **Ok** to continue the Print Preview window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on **printer image** to print a blank registration form.

When finished click on **Done** to exit the screen

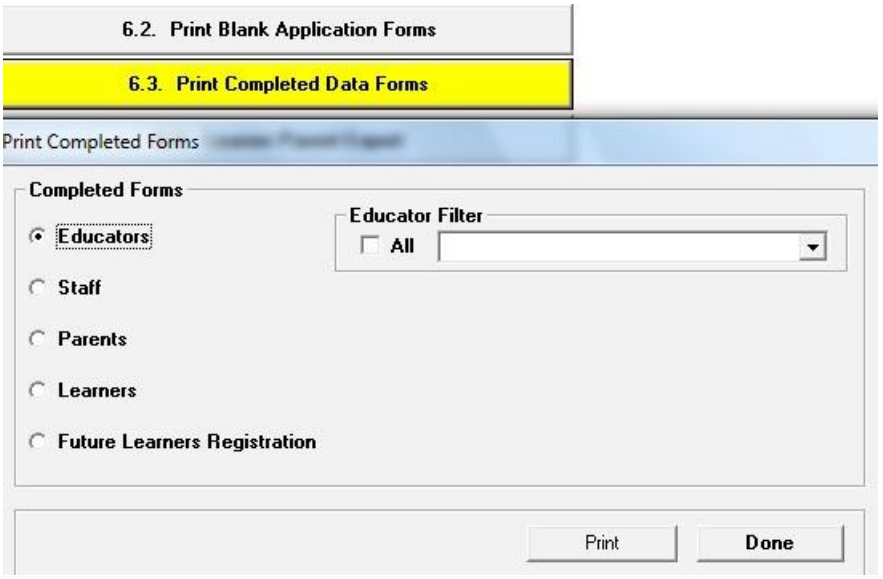


Figure 9: Select Completed Forms: Educators and Staff

Figure 10: Select Completed Forms: Parents and Learners

2.3 Learner & Parent Contact Data (Menu 6.3 and also Menu 2.7)

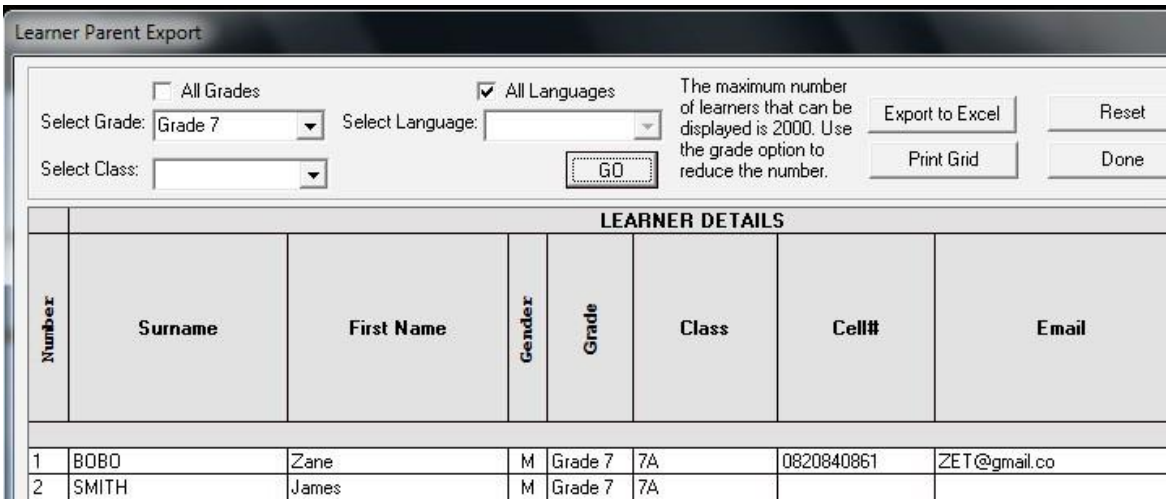
All contact details of the learner and linked parents / guardians are listed in this page.

- This list can be used as a register for the SGB elections.

Click on **Learner Parent Export** to open the current register (Fig. 11).

- Select the **group** (all grades or per grades or class).
- Click on the **Go.**
- Click on **Print** to print a hardcopy.
- Click on **Export to Excel** to export the parent and learner list to an Excel file for further data use.
- To refresh the page click on **Reset.**

When finished click on **Done** to exit screen



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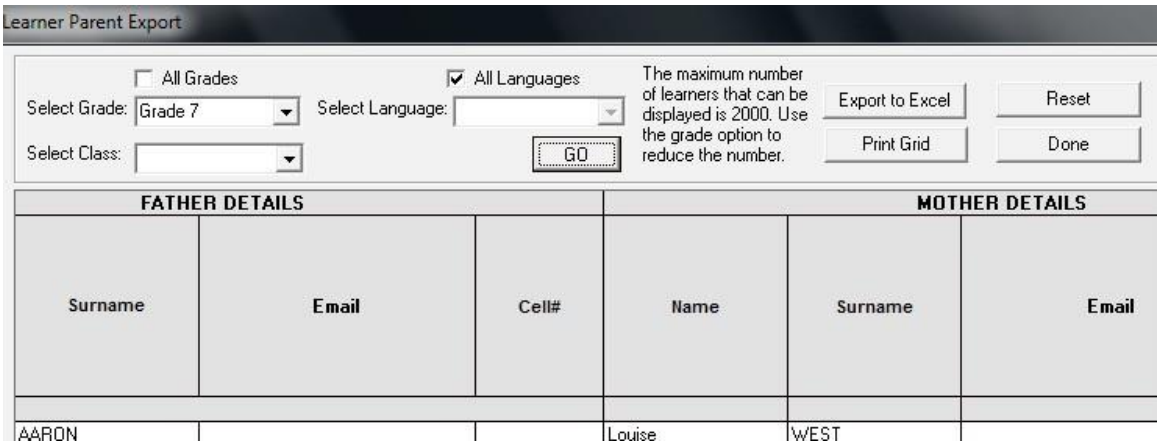

Figure 11: Learner Parent Export

C. SUMMARY

The **Standard Letters and Forms module** includes the management of correspondence between the school and standardising and quality assurance of learner and staff details to be captured.

This module can be divided into 3 sections according to the allocated functions:

- Create and print of official letters and labels.
- Print blank and populated registration forms.
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3.1 Quick reference of the sub-menus and their uses:

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		• **Print labels** with addresses
2.2 Application Forms	6.2 Print Blank Application Forms	Blank registration forms for **Capturing** • Educator • Learner & Parent • Staff
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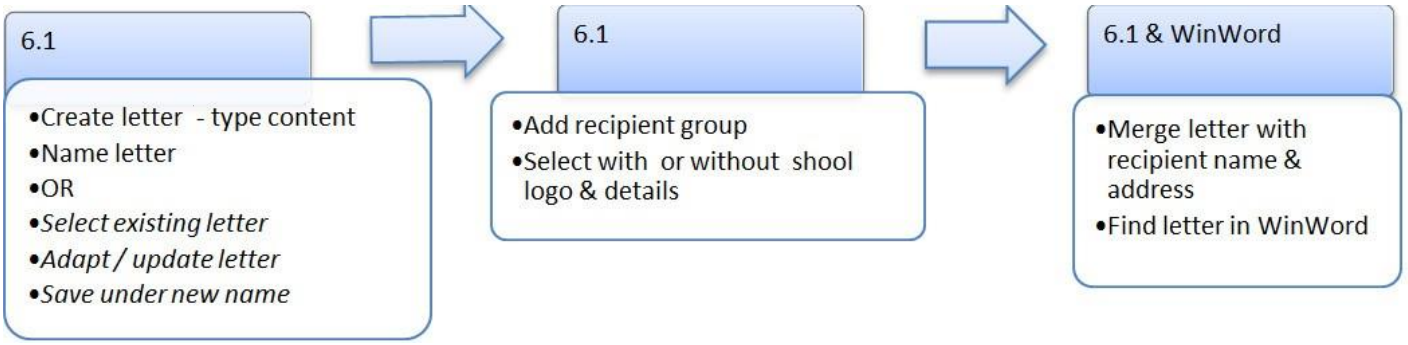
		Export lists per grade, class or all • with contact data of learner and all parents

3.2 "How to..." flow diagrams & other important summaries:

- ***Create & merge letters***



- ***Advantages of using merge letters***

One letter is duplicated and ...	○ addressed to each selected individual
A letter is "merged" automatically with ...	○ school address and logo ○ individuals with addresses from a selected group
Letter format and content reused	○ Letters can be saved for reference, ○ Letter can be recalled and updated for new event (e.g. parents day, misconduct notification) ○ Used as a standard for other grades (or functions) e.g. memos, circulars, sport and extra-mural letters.

- ***Using Registration forms for QUALITY ASSURANCE PROCESS :***

Blank Registration Forms	Completed (pre-populated) forms
• **ORIGINAL source document** for details of learners, parents, educators & staff	• **Source document for VERIFICATION** of details from learners, parents, educators & staff
• Data **completed manually** on the form	• Data **corrected manually**
• **Stored/Filed** with **copy of ID / Birth certificate** in **Learner Profile, Educator or Staff File**	
• Source document for data audit	

- ***Advantages of using Learner Parent Export***

Contact details of Learner and all parents available for...	when directly printed	○ Contact list for register teacher
	when exported to Excel & after removing some columns	○ Voting register for SGB elections ○ Attendance register for AGM

Notes

Feedback/Contact Form

Your feedback is important to us. Please leave any comment that you want. If you are struggling with anything in this module, please send us an email and remember to also give us a number or email to contact you back with.

Contact Name:

Email Address:

Cellphone Number:

Version of SA-SAMS:

Operating System:

District / Province:

Comments / Problem Details:

Send Email

Contact Person	Telephone	Email
Carinne van der Westhuizen	0123573832	vanderwesthuizen@dbe.gov.za
Pauline Ramphele	0123573287	ramphele.m@dbe.gov.za
Lebogang Mveke	0123573396	mveke.l@dbe.gov.za

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