

Filter Correspondence Recipients

You may need to filter the list of potential recipients of the correspondence.

There are two ways to filter the list:

- The first filter starts with a list of individuals based on the Document type you selected. It can be narrowed by removing individuals from the list that shouldn't receive the correspondence. For example, if the document type is Students, then students appear in the filtered list and individual students can be added to the list.
- The second filter is based on saved search criteria. This criteria can be set up and saved by clicking **Searches**. Use this filter method when the list of recipients is more complex than a general group of individuals. For example, you may want to send a letter to active senior students or to the parents of 4K children with no immunization records.
 1. On the Home screen, click **Correspondence**.
 2. Double-click the correspondence you want to filter, and click the **Filter/Search** tab.
 3. Select **Print only these individuals in the list**, and click **Select**. The Select Individual dialog box displays.
 4. In the Search for field, enter the name of a student you want to add and click the **Student Name**.
 5. Click **OK**.
 6. Continue this process until all names for the correspondence have been added to the list.
 7. Click **OK**.
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 2. Double-click the correspondence you want to filter, and click the **Filter/Search** tab.
 3. Select **Print only these individuals in the list**, and click **Search**.
 4. Click the **Search** list and select the search you want to use. Click **OK**.
 5. All individuals that fit the search criteria display. Select any you don't want to send correspondence to, and click **Remove**.
 6. Click **OK**.

When selecting recipients in the Correspondence window, teachers can filter the class roster to display the names of students in a particular class. First, create the correspondence you plan to send to parents or students. In the Correspondence window, the Document Type must be Parent or Student. Save your correspondence. For more help creating correspondence, on the Home screen, click **Correspondence**. When the Correspondence List window opens, on your keyboard, press F1 to view online help.

1. On the Home screen, click **Correspondence**.
2. Double-click the letter or email you want to send.
3. Click the **Filter/Search** tab.
4. Select **Print only these individuals in the list**.
5. Click **Select**.
6. In the Select Class list, select the class.
7. Click **OK**.
8. You can then select individual students, and click **Remove** to delete them from the correspondence list; or, to add additional classes, click **Select** and repeat steps 6 and 7.



Useful Information

This feature is available for those using a Teacher Login.