How to Create a Mail Merge Using Microsoft Excel and Word

1. Create an Excel spreadsheet
   a. The columns in your spreadsheet should match the fields you want to use in the merge (i.e. Title, First Name, Last Name, Address, City, State, Zip) – See example below
   b. Participant Name must be separated into two columns (one column for ‘First Name’ and one column for ‘Last Name’ - they cannot be combined)
   c. Be sure to sort the mailing list in ascending order by row_num (also called Order ID number in earlier documents)
   d. Assign one Study ID number from the available range of Study ID numbers to each record in the Mailing List, beginning with the smallest Order ID number and proceeding until the full range of Study ID numbers have been assigned

   All changes will need to be made before connecting the spreadsheet to your mail merge document in Word

2. Save the Excel spreadsheet
3. In Microsoft Word, open your site’s ‘Cover Letter’ document

4. On the Menu tab, select VIEW > check the box next to Ruler
   - This will allow you to see the ruler at the top of the page and to the left of the page

   - Note that the date is located just above the 1 inch mark, the ‘(name)(street address)(city, state, zip)’ is located 1 ½ inches down and tabbed to the right, and the ‘Dear (name),’ is located just
below the 3 inch mark – this spacing will allow only the name and address of the participant to be visible through the outgoing envelope’s window

5. To insert date, highlight \{date\} in the Word document with your cursor
6. In the Menu bar, select INSERT > Date & Time
7. In the pop-up window, select the available date format highlighted in the image below
8. Be sure the box is checked next to Update automatically
9. Click OK
Date should now be populated as seen below

10. To create the mail merge, in the **Menu** bar, select **MAILINGS > Start Mail Merge > Letters**

11. Click **Select Recipients > Use an Existing List...**

12. Browse to your Excel spreadsheet created in steps 1 and 2, and then click **Open**

13. If Word prompts you, select **Sheet1$** and click **Ok**
14. Place your cursor in front of \{name\}

15. In the **Menu** bar, select **MAILINGS > Address Block**

16. Be sure that the pop-up window looks the same as the example below

17. Click **Ok**
Your Word document should look similar to the image below

June 1, 2015

Dear {name},

We invite you to participate in a research study called “Share Thoughts on Breast Cancer.” The University of Iowa is part of a group of nine medical centers, the Greater Plains Collaborative, a federally funded research project for doing large, timely studies to improve medical care.

May 28, 2015

Dear {name},

We invite you to participate in a research study called “Share Thoughts on Breast Cancer.” The University of Iowa is part of a group of nine medical centers, the Greater Plains Collaborative, a federally funded research project for doing large, timely studies to improve medical care.

18. You may now delete \{name\}{street address}{city, state, zip} – only keep <<<AddressBlock>>>

You may need to reposition ‘Dear {name},’ so that it is located just below the 3 inch mark.
19. Place your cursor in front of Dear \{name\},

Dear \{name\},

We invite you to participate in a research study called "Share Thoughts on Breast Cancer." The University of Iowa is part of a group of nine medical centers, the Greater Plains Collaborative, a federally funded research project for doing large, timely studies to improve medical care.

20. In the Menu bar, select MAILINGS > Greeting Line

21. Be sure that the pop-up window looks the same as the example below

![Mailchimp Greeting Line](image)

22. Click Ok
Your Word document should look similar to the image below:

![Image of a Word document showing a professional letter format]

23. You may now delete **Dear (name)**, – only keep **<<GreetingLine>>**

- Once again, be sure that the date, **<<AddressBlock>>**, and **<<GreetingLine>>** are located at the appropriate positions (just above the 1 inch mark, at 1 ½ inches, and just below the 3 inch mark, respectively)

We invite you to participate in a research study called "Share Thoughts on Breast Cancer." The University of Iowa is part of a group of nine medical centers, the Greater Plains Collaborative, a federally funded research project for doing large, timely studies to improve medical care.

May 26, 2015

<<AddressBlock>>

<<GreetingLine>>

We invite you to participate in a research study called "Share Thoughts on Breast Cancer." The University of Iowa is part of a group of nine medical centers, the Greater Plains Collaborative, a federally funded research project for doing large, timely studies to improve medical care.
24. Be sure the section **Part 2: Medical Record Consent (beginning on page 23 of the booklet)** is located on the second page.

**Part 2: Medical Record Consent (beginning on page 23 of the booklet)**

Participation in Part 2 involves signing a consent form to give us permission to use information about you from your medical records. At the back of the questionnaire booklet you will find the consent form and more information about this part of the study. If you decide to participate in Part 2, you will sign the consent form. There is also a copy of the consent form for you to keep for your records.

Your participation in this research is voluntary. However, your assistance is very important to the success of the study. If you decide not to participate, please return the blank questionnaire booklet in the postage paid envelope provided or call the toll-free number below so that we do not contact you again. The $10 gift is yours to keep. We will re-mail the questionnaire one time if you decline participation.

25. To preview your merged cover letter, select MAILINGS > Preview Results.
You may need to adjust the spacing of the date, address block and greeting line (once again) to be sure the date is located just above the 1 inch mark, the address block is located 1 ½ inches down and the greeting line is located just below the 3 inch mark. Also, double check that the section ‘Part 2: Medical Record Consent (beginning on page 23 of the booklet)’ is still located on the second page.

26. Once your cover letter is complete, select MAILINGS > Finish & Merge > Edit Individual Documents...

This option will open each participant’s letter within ONE Word document. You should scroll through each letter to be sure the spacing of the date, address block and greeting line is accurate. Also, be sure that the section ‘Part 2: Medical Record Consent (beginning on page 23 of the booklet)’ is still located on the second page.

Once all of the letters have been checked, you may print the document.

When printing, please print double-sided so that the 2-page cover letter is on ONE piece of paper (front and back).