**Mail Merge Instructions for User ID Distribution**

**NOTE: This step must be completed no later than 12/13/21**

Please use the attached template along with log in instructions to provide your associates with their username and important information about UKG. This is a template. Feel free to customize, update the logo, etc. based on any unique requirements you have at your club.

Mail Merge Instructions:

1. Save the sample letter to your computer
2. Customize the letter to your operation
	1. Most clubs are biweekly (12/18/2021). If you are in NY or RI you are on a weekly cycle (12/25/2021). If you have questions on what cycle you are on please reach out to your payroll contact.
	2. Add your club specific instructions on clocking in
3. Run Your “UKG Username” Business Intelligence Report
	1. For information on how to run a Business Intelligence report, see the tutorial below
4. Download as Excel data and save this to your computer
5. Sort the data in the order you want the documents to print with the merge
6. Save the file to your computer
7. Follow the mail Merge wizard features in Word
	1. Open the letter
	2. Select the “Mailings” tab
	3. Select “Start Mail Merge”
	4. Select “Step-by-Step Mail Merge Wizard”



Step 1: Select “Letters” as the document type

Step 2: Select Starting document: “Use the current document”

Step 3: Select Recipients: “Use Existing list”

Step 4: Select browse and find the UKG Username file that you saved in the above step 6,

Step 5: Add the fields into the letter.

* To do this you will highlight the place holder fields (ex. Highlight [Full Name]), next on the right-hand side select “More Items”. Click on the “Full Name” in the list and select insert. Repeat this step for all placeholder fields.

Step 6: Preview the letter

-Read through the letter and verify that all of the placeholder fields are filled in with the correct information

Step 7: Complete and print your mail merge

1. Provide letters on your go live date