

Student Monitoring and Engagement Process

Version 22_01 (UPE)

The following document is to be used to monitor student engagement, in any given week throughout an academic semester, and actively respond to those students that have not met our engagement expectations. The policy does not apply to periods during the semester break (publicised vacation/holiday periods), pre-orientation and after course completion/progression points.

For those that are supporting student engagement and monitoring should also read policy; **CPR M3 Attendance and Engagement**. The policy outlines the regulatory requirements for academic engagement, Navitas expectation of engagement and our standard service level agreement with our Partnering Universities.

Our approach remains that all students are expected to attend all classes. There are no references to specific countries in this process guide and all UPE Colleges should align their monitoring and engagement practices accordingly. Unless a College has requested, and subsequently approved an alternative version of engagement monitoring, this process applies to all Colleges.

Navigate, the student record system, is the primary source for inputting and extracting attendance data.

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Regulatory, Immigration Sponsorship and Accreditation

National regulation, immigration and accreditation obligations dictate that varying requirements of attendance monitoring and engagement take place within our Navitas Colleges throughout Europe. Furthermore, students subject to immigration control (require a visa to study) have conditions placed on their sponsorship to attend their course of study.

Our attendance and monitoring framework highlighted throughout this process guide, and the College Intervention Plans, take in to account our regulatory responsibilities. It is imperative that none of the conditions outlined are breached, without College Management awareness and approval, so that compliance is suitably maintained.

The Monitoring Process

It is recommended that missing attendance is tracked at intervals throughout each week during the semester. Colleges' are to run the Attendance Report (see Appendix B) to follow the progress of every student's engagement during this period.

The following practices are required to enhance the monitoring process within Navigate:

- Accurate completion of registers;
- Frequent student engagement communications;
- Evaluation of Virtual Learning Environment (VLE) logs; and,
- Comprehensive records of the activities that influence and impact engagement decisions.

To support the monitoring process teachers will additionally be asked to identify and escalate particular instances of student non-engagement, where intervention should then be made.

Virtual Learning Environment (VLE)

Within Navigate, it is currently possible to determine a student's access to the VLE by the security logs in the 'Records' tab of a student's record. Whilst these logs do not directly identify that attendance was established they may be viewed, upon College management discretion, as a form of engagement.

With the ongoing development of data from our VLE's, and other collaborative environments, future VLE engagement reports will be available to influence engagement data.

Attendance Thresholds

The table below outlines the basic thresholds for expected attendance and intervention levels.

Attendance %		
Level	Threshold	Intervention
0	85 >	None
1	70 > < 85	Bulk warning email
2	50 > < 70	Personalised warning email
3	30 > < 50	Arranged face-to-face Meeting
4	< 30	ITE
Consecutive Absence		
0	0 > < 10	None
1	10 > < 15	Arranged face-to-face Meeting
2	15 >	ITE

Monitoring Timescales

Each College will align with the following weekly monitoring process:

Semester Period	Action Points	Activity	Additional Activity
Week 1	Bulk email	Navigate registers/bookings and communications	Engagement Expectations (new students) Attendance summary and expectations (returning students) Engagement plan (returning students)
Week 2	Bulk warning email	Navigate registers/bookings and communications	
Week 3	Bulk warning email	Navigate registers/bookings and communications	
Week 4	Bulk warning email	Navigate registers/bookings and communications	
Week 5	1 st Intervention Point	Summaries and scheduling	4 weekly attendance summary (wks 1 – 4)
Week 6	Intervention Activity	Meetings, Engagement Plans	Withdrawal and Termination Process
Week 7	2 nd Intervention Point	Summaries and scheduling	4 weekly attendance summary (wks 3 - 6)
Week 8	Intervention Activity	Meetings, Engagement Plans	Withdrawal and Termination Process
Week 9	3 rd Intervention Point	Summaries and scheduling	4 weekly attendance summary (wks 5 - 8)
Week 10	Intervention Activity	Meetings, Engagement Plans	Withdrawal and Termination Process

Week 11	4 th Intervention Point	Summaries, scheduling Meetings, Engagement Activity	4 weekly attendance summary (wks 7 - 10)
Week 12			Exams / Assessments

The Engagement Process

The ability to provide support for students that fail to engage in their studies is one of several areas that is believed to be a highlighted value that is added to the student experience at a Navitas College. The framework in this process guide is specifically designed to supplement a student's pastoral, welfare and academic needs whilst identifying local resourcing requirements and prioritisation of those that require the support the most. Early intervention is key to re-engagement and intervention begins when a student falls below the minimum 85% attendance requirement.

A reminder of our expectations of what engagement is valued to be:

Engaged	Non-Engaged
<ul style="list-style-type: none"> Attendance from a scheduled 'session' Class, seminar, tutorial Meeting (one-to-one/group) as recorded by a lecture / tutor / member of administration staff Browsing data, taken from Moodle/other VLE 	<ul style="list-style-type: none"> No clear evidence of a student attending a scheduled session

Weeks 1 to 4 – Semester Orientation

Attendance %	Intervention
85 >	Summary of attendance record
70 > < 85	Bulk warning email
50 > < 70	Bulk warning email
30 > < 50	Bulk warning email
< 30	Bulk warning email

The first 4 weeks of term are considered transitional weeks whereby students are registering on their programme, adapting to life outside of their home country or, for returning students, progressing on to new modules. During this period there will be reduced intervention with engagement limited to a mix of email templates or, where resourcing allows, personalised email responses. At this point it is to be made explicitly clear our engagement expectations and the requirement for good attendance and consequences of poor engagement. This sets the tone for the remaining semester.

a) New Students

Week 1:

A generic attendance email will be sent to all new students, via Navigate, outlining our engagement expectations for the course. This will include the consequences of poor attendance and the regulatory requirements.

Weeks 2 – 4:

For those students falling below the 85% threshold a warning letter, for the appropriate attendance level, will be sent via Navigate each week.

b) Returning Students

Week 1:

Level 0, 1 and 2 - During week 1 of a new semester an attendance summary for the previous semester is to be sent to each student in these levels. The email, automated through Navigate, will also outline our engagement expectations and communications for the semester and highlight the consequences of poor attendance.

Level 3 and 4 – During week 1 of a new semester a face-to-face meeting is to take place to agree a personalised engagement plan. The meeting will also reinforce our engagement expectations and communications for the semester.

Weeks 2 – 4:

Unless subject to a personalised engagement plan, those students falling below the 85% threshold will be sent a warning letter each week, for the appropriate attendance level, via Navigate each week.

Weeks 5 to 11 – Intervention Points

Level	Attendance %	Intervention
0	85 >	Bulk monthly summary of attendance email
1	70 > < 85	Bulk warning and monthly summary of attendance email
2	50 > < 70	Personalised warning email/phone call
3	30 > < 50	Face-to-face Meeting, engagement plan
4	< 30	Engagement plan, ITE

Regardless of being a new or returning student during weeks 5 to 11 college engagement activity will be vital to help re-engage students and reinforce our expectations. It is at these points that intervention truly begins, and it becomes apparently clear whose support is needed the most. At week 5, the first '4 weekly' attendance summary will be available to view on the Student Engagement Report. This will help determine the appropriate level a student currently falls within and categorise the required intervention.

Weeks 5, 7, 9:

At these intervention points college staff will determine those students that will require targeted intervention based on the level and intervention category identified. Typically, this will be students at levels 2, 3 & 4. To judge the most suitable intervention the College Intervention Plan is to be referred to.

Through the intervention staff will aim to establish:

- The reason for non-engagement
- If there is a welfare concern
- If the student requires additional support to re-engage
- If the student is likely to re-engage

After sending out the appropriate warning and considering the student response (including no response) you will need to determine if the student's absence:

- can be justified and therefore approved (illness/medical grounds, time-zone constraints), or
- can be justified but not approved (absent without good reason, technical IT issues), or requires referral (welfare or academic support required), or
- unknown absence and needs appropriate warning

Based on the outcome of the communication if further action is deemed required then intervention activity will be scheduled for the following week (weeks 6, 8, 10).

Weeks 6, 8, 10:

Weeks 6, 8 and 10 are key intervention weeks and should provide the college with the opportunity to meet with a student and design/discuss their engagement plan. Equally it may be a period of appeal if the student is subject to an ITE and a meeting is held to determine if a withdrawal will proceed.

Weeks 11 and 12 – Examinations / Assessments

With the approach of the end of the semester week 11 monitoring and engagement practices are reduced to account for the examination/assessment period. Week 12 is classified as a week that no engagement activities take place that are not directly related to examinations or assessments.

Week 11:

Week 11 remains an intervention point, and students are to be categorised based on their current threshold level and the appropriate intervention activity scheduled or acted upon accordingly – with the likelihood of no action taking place during week 12. Focus should fall on those already on an engagement plan, requiring an engagement plan, requiring an ITE, or, in the stages of an appeal to an ITE.

Consecutive Absence

The monitoring of consecutive absence remains a valid engagement tool as it helps to identify students that have been absent from scheduled engagement for an unsatisfactory length of time. Absence for the stated reporting periods below will help the College identify students that may require urgent welfare or pastoral support. It may also define whether a student is unprepared to take their studies seriously or may have gone AWOL. Colleges must follow the process outlined at each absence point. Where mitigating circumstances have been identified and absence has been approved a mark on their attendance record should be made so consecutive absence is reset.

Level	Consecutive Absence	Engagement Activity
0	0 – 9	No action required
1	10	Request and hold face-to-face meeting, engagement plan initiated 5 days to respond and engage
2	15	No response from meeting request = ITE Response from meeting request but no improvement up to 15 th day = ITE

Record of Actions

Engagement activity that requires action (non-automated through Navigate) must be recorded on or through the student record in Navigate. This may include phone calls, face-to-face meeting, engagement plans, ITE's, etc. Engagement activity can be recorded in the notes tab of the student record and should include comprehensive detail of the actions and outcomes of re-engagement. Such detail may be used as practical evidence during an audit or inspection by a regulatory body.

Appendix A - Attendance Marks

Navigate offers a range of attendance marks that can be applied to a student's attendance, or non-attendance, to a scheduled engagement. A list of the attendance marks, in the following table, are available to update a register or individual student attendance booking.

Within each register there is the opportunity to mark all students within a class. The options available are **Mark all Attended** and **Mark all Absent**. If all students are present or absent this feature can be used.

Note: Occasionally a class will be timetabled that contains no student records. To mark these classes as complete the 'Is Complete' tick box will need to be selected by editing the 'Main' tab of the attendance booking. These classes will not affect a student's percentage attendance.

Attendance Mark	Attendance Meaning
Attendance in Person (AP)	Student is present in class in person
Attendance Online (AO)	Do not use this code
Half in Person (HP)	Student attends class in person but he/she is late (10 minutes or more)
Half Online (HO)	Do not use this code
Approved	Student's absence is approved (sickness)
Medical	Student provides medical note for sickness
Late Registration	Student has registered late to the current term
Bereavement	Student has a close family bereavement (with supporting evidence)
Compliance	Student has an immigration related appointment
Sponsor	Student is due to meet with their sponsor
Attendance not required	Used when a student within a group class is not required to attend
Family	Do not use this code
Late	Do not use this code

Appendix B – Attendance Report

The Attendance Report provides a full overview of a student’s weekly attendance percentage and consecutive absence summary for a selected semester. The report is a live data set hosted by Microsoft PowerBI. Relevant staff that manage attendance will have access to the report to be able to address engagement in accordance with this process guide.

The report will clearly identify a student’s attendance percentage (%) and the attendance threshold level they currently maintain at a given week. After a 4-week period a ‘4 weekly’ rolling average will be available highlighting the average attendance for all scheduled classes during the prior 4-week period. Furthermore, data will be available that shows the average semester attendance and threshold level as well as a previous semester attendance average and threshold level.

Reliability Scoring

Evidenced on the report will be a reliability scoring metric aimed at determining if the data you are viewing for each student is an accurate reflection of their current attendance and threshold level. The levels are as follows:

Reliability Level	Reliability %	Meaning
High	95>	Attendance bookings have mostly been completed and the attendance data has a high probability of accuracy
Medium	85 >< 95	Some attendance bookings are missing, and the attendance data has a medium probability of accuracy
Low	<85	A range of attendance bookings are incomplete, and the attendance data has a low probability of accuracy

Where the reliability is below 95% there are likely to be incomplete bookings (registers and attendance marks) in a student record. To update incomplete bookings and enhance the accuracy of the attendance data the process in Appendix C is to be followed.

Appendix C – Searching for Missing Attendance

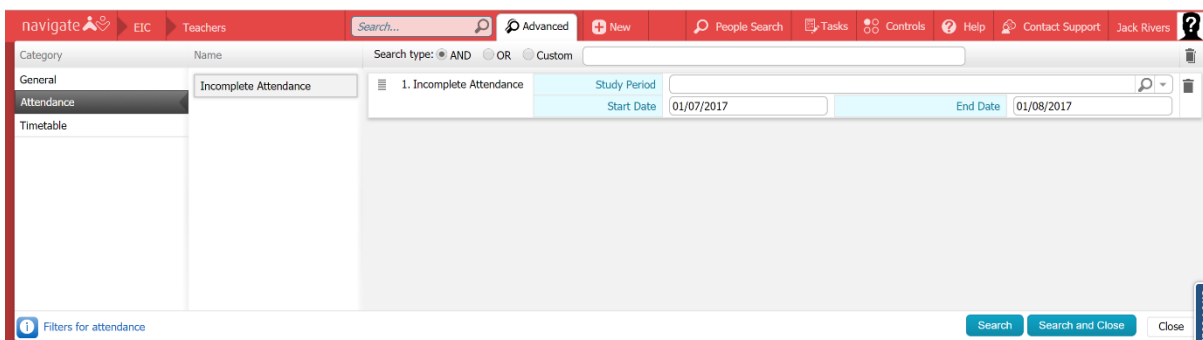
It is recommended that missing attendance is followed routinely throughout each week of the semester.



It is important that this activity is run in Navigate through either the **Teachers** work area or **Bookings** work area prior to attendance monitoring actions being taken to ensure that attendance records are complete. Failing to do this will result in incorrect attendance calculations for students and a low reliability score.

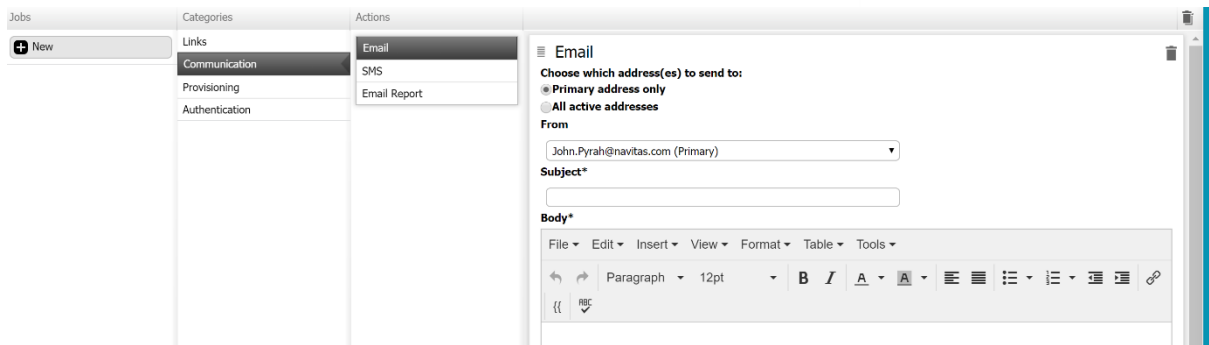
Where attendance is missing, the college should follow up with the Teacher to ensure that this is completed promptly. Where individual student attendance has not been completed, College Services may need to complete this themselves if they know the correct information to input.

Teachers Work Area

1. Select your relevant business unit.
2. Select the **'Teachers'** work area found below the **Academic Supporting Data** work area.
3. Next, select **'Advanced'**, this will open the search function – which will split your screen into your search area, and your results area – where you will be able to work with your generated worklist.
4. Click **'Attendance'** from the category list - this will generate a list of sub-categories that you can drag and drop into the search filter. Drag **'Incomplete Attendance'** into the search field (see diagram below). Enter a **Start** and **End** date period covering the time since you last ran the report or select a full study period from the study period field (this will auto populate the full-term period for a particular cohort).



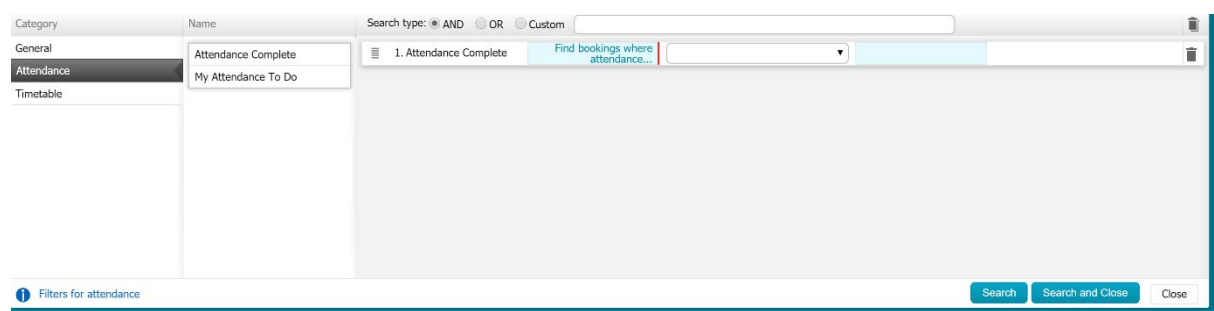
5. Select **'Search and Close'**.
6. This will present you with all the teachers that have any attendance missing from this time-period.
7. Select the Controls button  and Actions  from the drop-down menu.
8. This selection will take you to a new screen.



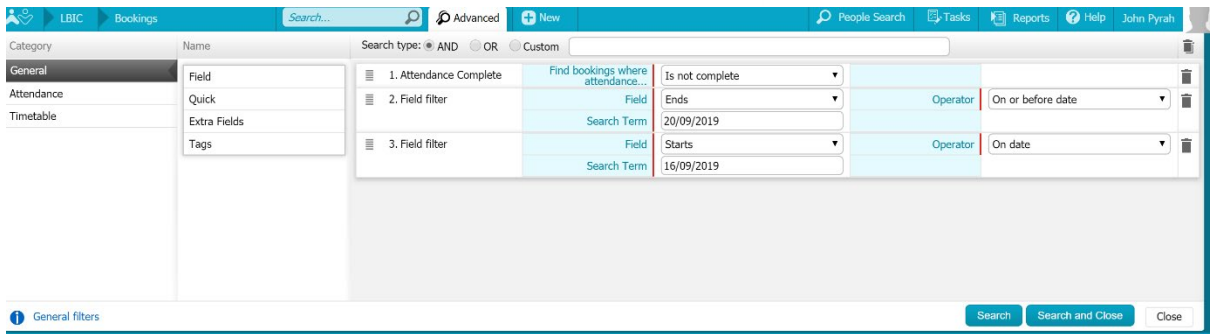
9. Select '**Communication**' from the Category's menu.
10. Next, select '**Email**' from the Actions menu and drag and drop it into the actions area.
11. Choose to send your email to either the teacher's primary email, or any email addresses on record for that/those teachers.
12. Enter an appropriate subject line and text for the body of the email.
13. When you are ready, you can then select to preview the email and once happy with the content, Queue the emails to send.

Bookings Work Area

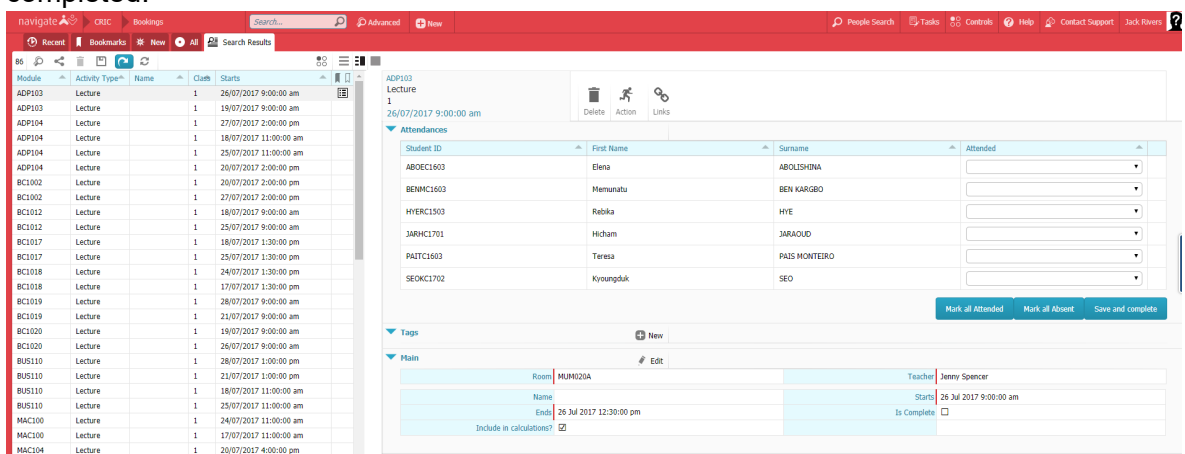
1. Select your relevant business unit.
2. And enter the '**Bookings**' work area under the **Timetable** work area list.
3. Select '**Advanced**', this will open the search function – which will split your screen into your search area, and your results area – where you will be able to work with your generated worklist.
4. Select the '**Attendance**' category - this will generate a list of sub-categories that you can drag and drop into the search filter. Drag '**Attendance Complete**' to find bookings where attendance '**Is not Complete**' (select).



5. From the '**General**' category drag '**Field**' into the search area. Enter the Field '**Ends**', Operator '**On or before date**' and Search Term using today's date or the last day of the week (e.g, running the list on a Friday).
6. From '**General**' drag '**Field**' into the search area again. Enter the Field '**Starts**', Operator '**On or After**' and '**Search Term**' adding the last date that this process was carried out (eg, a week ago or start of current term).



7. Select **'Search and Close'**
8. This will then present you with any classes where attendance has not been fully completed.



9. Where attendance is missing, the college should follow up with the Teacher to ensure that this is completed promptly. Where individual student attendance has not been completed, Student/Academic Services may need to complete this themselves if they know the correct input.

Appendix D – Student Notifications

Re-engagement is a pivotal aspect of maintaining the student experience and expectations whilst adhering to our operational relationship with our University Partner, and Immigration duties as prescribed in the latest Attendance and Engagement Policy.

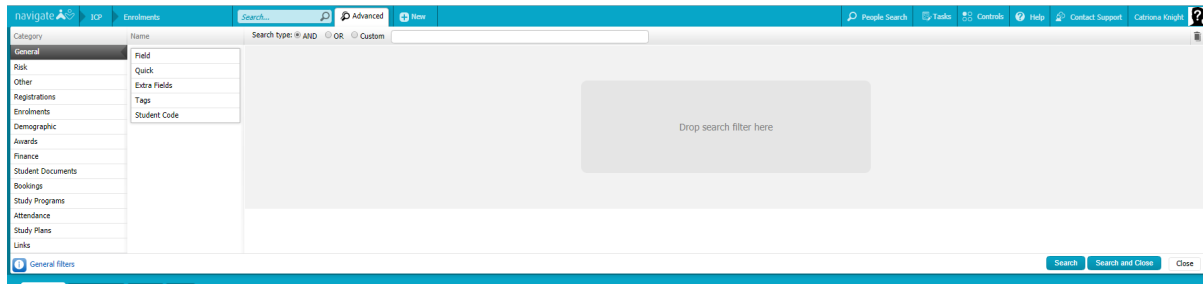
On identifying a student has breached an attendance threshold (identified in the Attendance Threshold table) the relevant action prescribed in the engagement process is carried out.

Reminder: It is a regulatory requirement that detailed notes of the actions and outcomes of the monitoring and engagement activity are captured in Navigate.

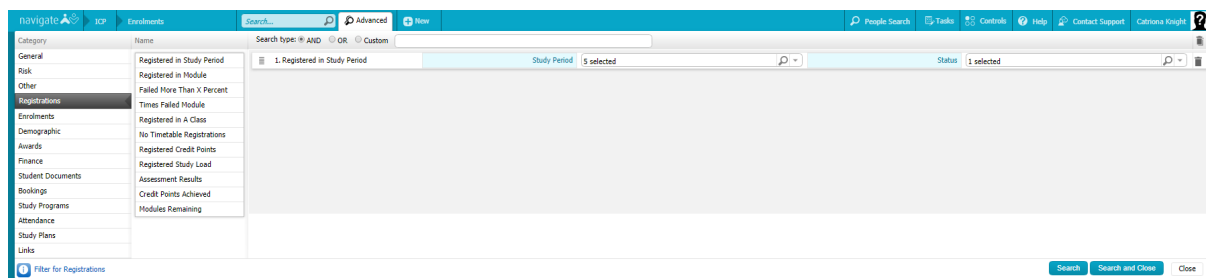
Percentage Attendance Monitoring & Warnings

1. Select your relevant business unit.
2. And the **'Enrolments'** work area.

3. Select **'Advanced'**, this will open the search function – which will split your screen into your search area, and your results area – where you will be able to work with your generated worklist.





4. Select the category **'Registrations'** – this will generate a list of sub-categories that you can drag and drop into the search filter.
5. From the list of subcategories, select **'Registered in Study Period'** by dragging and dropping it into the search filter.
6. Select your relevant study period (in this example the current search study period is already pre-selected) from the drop-down menu and select **'Confirmed'** from the status drop down menu.



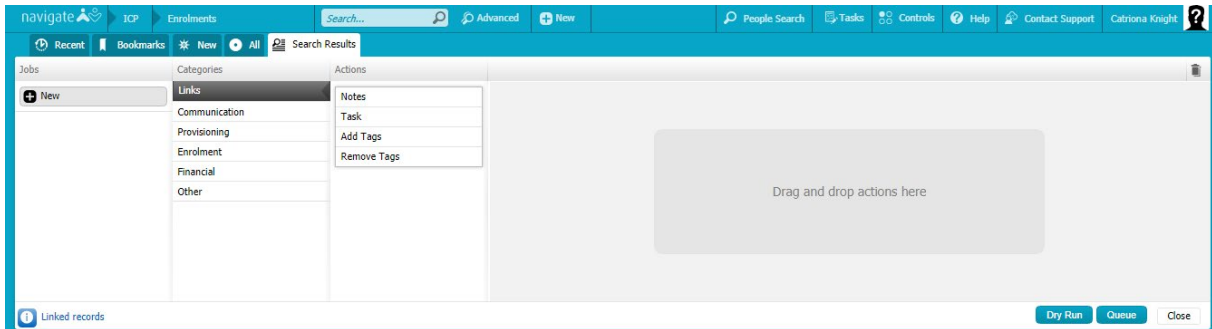
7. In order to refine your search, select **'Attendance'** from the category menu. You will be presented with the following filter options to drag and drop into your search area. Drag and drop **'Attendance To Date'**.
8. Once you have dragged and dropped your **'Attendance to Date'** filter into your search area, you will need to populate some of the cells with information.
9. You can leave **'Cohort'** and **'Module'** as ALL, unless you want to further refine your search.
10. The Study Period should be populated with the period in which you are searching (e.g., 202203, PM2203).
11. The **'Percentage'** will automatically populate with 85% - but we're going to start with the more severe Stage 2 Warning, and enter 50%
12. Operator can be altered according to your search parameters. In this example **'Less Than or Equal To'** is used.

1. Registered in Study Period	Study Period	5 selected	Status	1 selected
2. Attendance To Date	Cohort	- All -	Study Period	201702
	Module	- All -	Operator	Less Than or Equal To
	Percentage	50		

13. Once you have generated your work list, you can close the search function allowing your worklist to be seen full screen.

14. Select the controls button  and Actions  from the drop-down menu.


15. This selection will take you to a new screen.



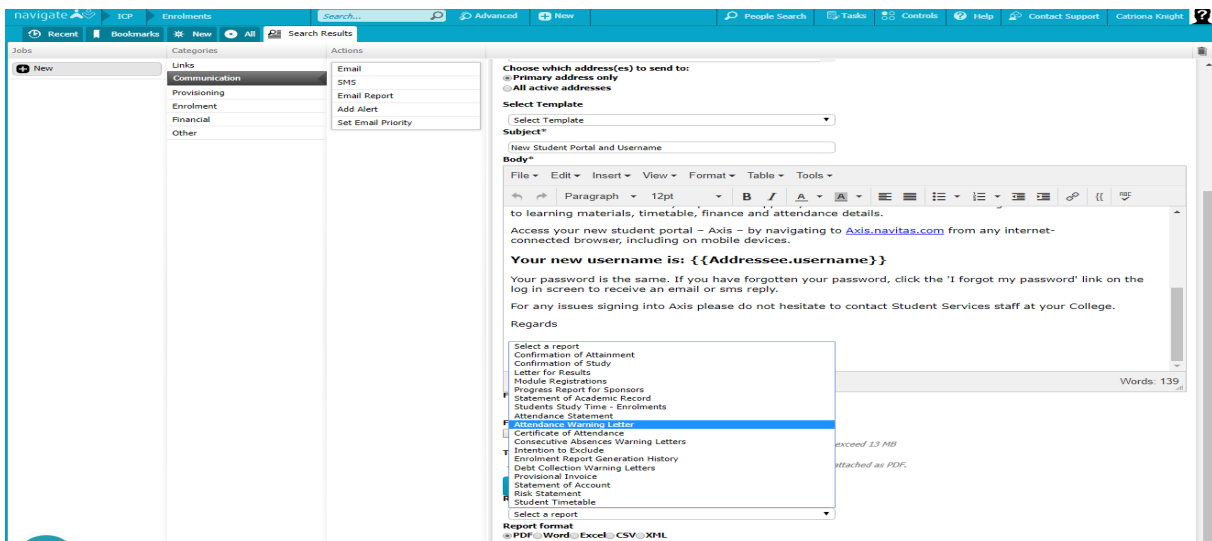
16. Select '**Communication**' from the category's menu.

17. Next, select '**Email report**' from the Actions menu and drag and drop it into the actions area.

18. Once your email report has generated, scroll down to the bottom where the report attachment drop down is located and select your chosen report to send to the student – in this example, **Attendance Warning Letter**.

To review the content of the attachment (attendance letter) before sending, press 

Note that even though these are created on bulk, they are still personalised to the student!



19. For the text body of the email, either select a template from the dropdown menu, or edit a blank template.

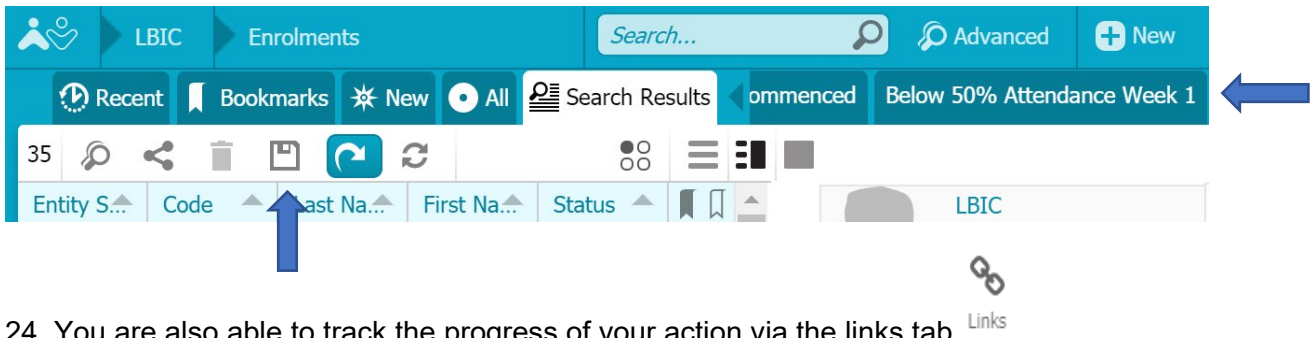
20. Once you are happy with the email content you must ensure that the appropriate recipient group is selected, e.g., **student** (found at the top of the email report) and that you are sending to the primary address or all addresses available for the student(s).

You will need to change the subject title of the email at this point so that it is relevant for the action you are carrying out.

21. To test your email and report attachment select **Dry Run** this function allows you to queue, process and reports back as if it were performing the live action.

22. Once you are satisfied with the content of your message and attachment click **Queue**
 This will automatically take you back to your worklist, and a message in a black box will appear at the top of your screen informing you that you job has been successfully queued. Once the job is complete (sent to the recipient) you will receive a confirmation message in the inbox of the address entered in the **'from email'** cell.

23. Once you are back in the section listing all the students in the % search criteria (e.g., below 50%) you can save the search criteria thus creating a **Worklist**. The worklist can then be edited in subsequent weeks and the data either overridden or saved under a different name (creating a new Worklist). You can do this by clicking the 'Save' icon and naming the worklist as you choose (e.g., Below 50% Attendance Week 1).

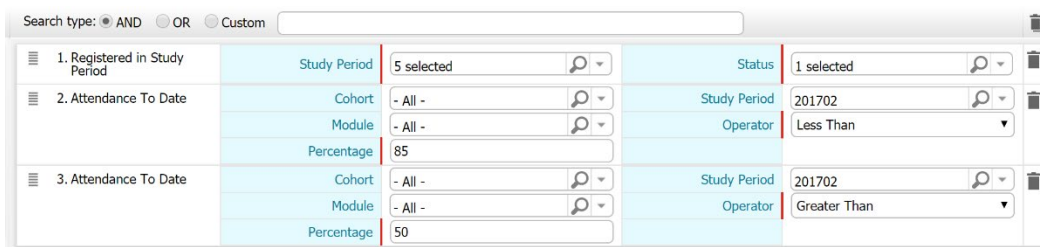


24. You are also able to track the progress of your action via the links tab Links

Stage 1 Warnings.

25. You should then return to point 1 to create a new worklist for our Stage 1 Warnings.

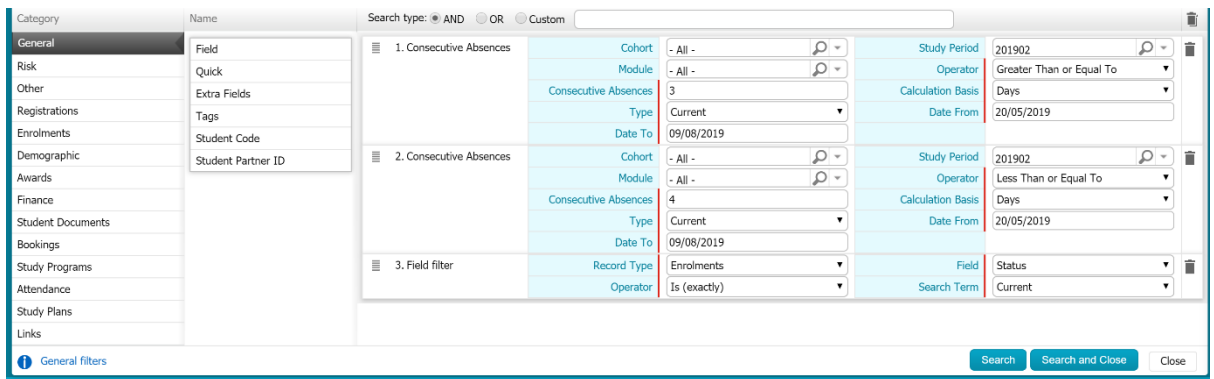
26. This time, we are looking for students with Attendance to Date that is greater than 50%, but less than 85%.



Don't forget to save your search as a **Worklist** as this will make it easier to simply edit your search criteria in subsequent weeks! See point 19 above.

Consecutive Absence Monitoring & Warnings


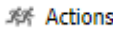
1. Select your relevant business unit.
2. And the **'Enrolments'** work area.
3. Select **'Advanced'**, this will open the search function – which will split your screen into your search area, and your results area – where you will be able to work with your generated worklist.
4. To select the relevant students for the first attendance warning, select the **'Attendance'** category then choose Consecutive Absences from the search filter. Drag this into the search field twice.
5. The boundaries for the warnings are 3, 5 and 7.
6. For both searches, enter the **Study Period** as the current (e.g., 202203, PM2203), select **'Greater Than or Equal To'** as the Operator, the Consecutive Absences as **'3'** in the first search and **'4'** in the second (changing the Operator to **'Less Than or Equal To'**), a Calculation Basis as **'Days'**, Type as **'Current'**, and leave the **Date From** and **Date To** as they are (as these are generated from the **Study Period**).
7. Then drag the **'Field'** parameter from the **General** category into the search panel, choose **'Status'** under the Field drop down, and select **'Current'** within the 'Search Term' field.

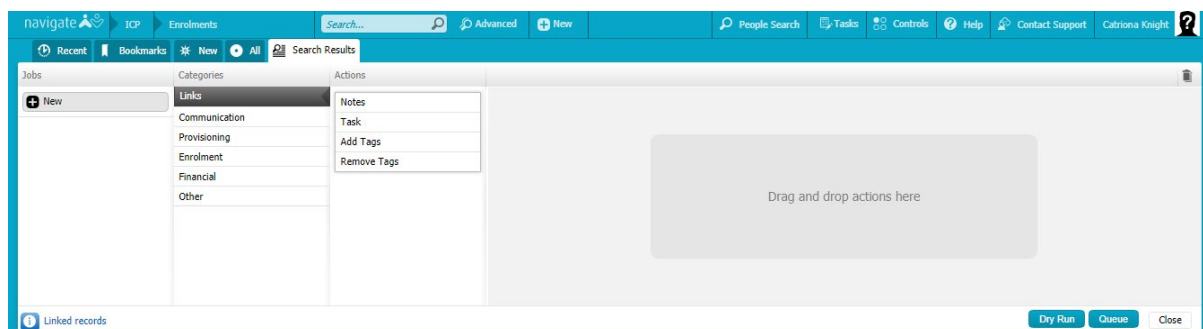


The screenshot shows a search configuration window with a left-hand menu listing categories like General, Risk, Other, Registrations, Enrolments, Demographic, Awards, Finance, Student Documents, Bookings, Study Programs, Attendance, Study Plans, and Links. The main area contains three search criteria:

- 1. Consecutive Absences:** Cohort (All), Module (All), Consecutive Absences (3), Type (Current), Date To (09/08/2019), Study Period (201902), Operator (Greater Than or Equal To), Calculation Basis (Days), Date From (20/05/2019).
- 2. Consecutive Absences:** Cohort (All), Module (All), Consecutive Absences (4), Type (Current), Date To (09/08/2019), Study Period (201902), Operator (Less Than or Equal To), Calculation Basis (Days), Date From (20/05/2019).
- 3. Field filter:** Record Type (Enrolments), Operator (Is (exactly)), Field (Status), Search Term (Current).

Buttons at the bottom include Search, Search and Close, and Close.

8. Select **Search and Close**.
9. Select the controls button  and Actions  from the drop-down menu.
10. This selection will take you to a new screen.



The screenshot shows the search results interface. The top navigation bar includes 'navigate', 'ICP', 'Enrolments', 'Search...', 'Advanced', 'New', 'People Search', 'Tasks', 'Controls', 'Help', 'Contact Support', and 'Cathiona Knight'. The main area has a 'Jobs' section with a 'New' button and a 'Categories' menu. The 'Categories' menu is open, showing 'Links', 'Communication', 'Provisioning', 'Enrolment', 'Financial', and 'Other'. The 'Communication' category is selected, and an 'Actions' menu is open, showing 'Notes', 'Task', 'Add Tags', and 'Remove Tags'. The 'Email Report' action is selected. The main area contains a large grey box with the text 'Drag and drop actions here'. Buttons at the bottom include 'Linked records', 'Dry Run', 'Queue', and 'Close'.

11. Select **'Communication'** from the category's menu.
12. Next, select email report from the actions menu and drag and drop it into the actions area.
13. Once you email report has generated, scroll down to the bottom where the report attachment drop down is located and select your chosen report to send to the student

– in this example, **Consecutive Absences Warning Letters**. To review the content of

the letter before sending, press

Preview

14. For the text body of the email, either select a template from the dropdown menu, or edit a blank template.
15. Once you are happy with the email content you must ensure that the appropriate recipient group is selected, e.g., **student** (found at the top of the email report) and that you are sending to the primary address or all addresses available for the student(s). You will need to change the subject title of the email at this point so that it is relevant for the action you are carrying out.

To test your email and report attachment select

Dry Run

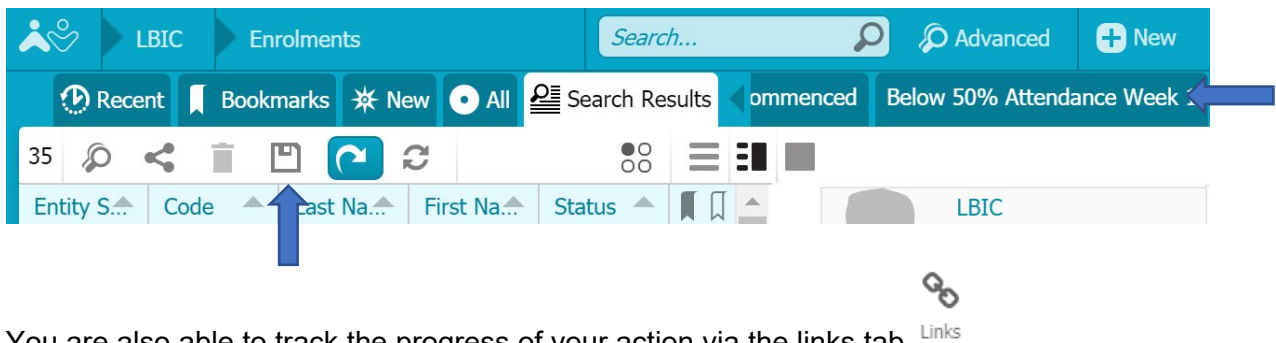
this function allows you to queue, process and reports back as if it were performing the live action.

16. Once you are satisfied with the content of your message and attachment click

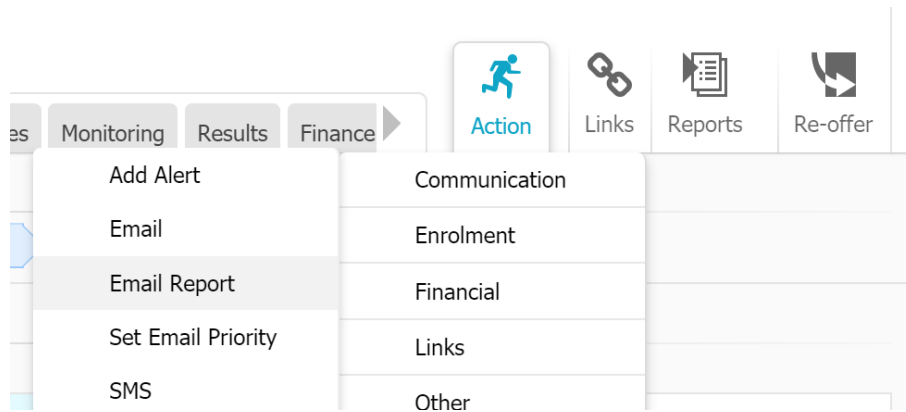
Queue

This will automatically take you back to your worklist, and a message in a black box will appear at the top of your screen informing you that you job has been successfully queued. Once the job is complete (sent to the recipient) you will receive a confirmation message in the inbox of the address entered in the **'from email'** cell.

17. Once you are back in the section listing all the students in the consecutive absence search criteria (e.g., 3 – 4 consecutive absences) you can save the search criteria creating a **Worklist**. The worklist can then be edited in subsequent weeks and the data either overridden or saved under a different name (creating a new Worklist). You can do this by clicking the 'Save' icon and naming the worklist as you choose (e.g., 3 – 4 Consec Absence Week 1).



18. You are also able to track the progress of your action via the links tab
19. Then repeat this for 5 to 6 absences, 7 to 9 absences, and 10 or above absences.
20. This then needs to be repeated for each study period that you have active (e.g., 202203, PM2203)
21. Should a student have 10 consecutive points of absence they are to be referred to the College Management Team (CMT) for further action. If they are sponsored under Student Route, an Exclusion Notification Letter will need to be sent to the student after approval from the CMT. You may wish to use a personalised letter created outside of Navigate which can then be sent from inside Navigate, or you can use the generic Exclusion Notification within Navigate.
22. To do this, go to the student's record within the **Enrolments** work area.
23. Go to **Action -> Communication->Email Report**.



24. Choose which emails to send the letter to and select a template (if you do not have a relevant template, select the blank template and personalise this, including a relevant subject. As the exclusion letter is a generic exclusion as opposed to being attendance specific, it is important that full rationale and provided within the email body.
25. In the '**Report Attachment**' dropdown, select the **Intention to Exclude** report, and choose to send it as a **PDF**.
26. A new field, '**Letter Type**' will appear, and here you should select '**Notification Letter**'.
27. Preview the letter to confirm that you are happy with its contents, and then select '**Run**'.