

<b>Version</b>	<b>1.0</b>
<b>Document Generation Date</b>	<b>10/14/20080</b>
<b>Date Modified</b>	<b>11/5/2008</b>
<b>Last Changed by</b>	<b>ASDS</b>
<b>Status</b>	<b>Draft</b>

## **FAN Communication Assignment**

### **Concept**

The FAN Communication Assignment process assigns initial award letters as well as revised award letters to students.

To assign initial award letters the searches for students who: (a) have Aid Processing Status "Packaging Completed", (b) have a Packaging Plan ID, and (c) have not already been assigned the FAN communication. The selected students are assigned a FAN communication, which can be a letter or e-mail. If the communication is a letter, it may be generated using the standard FAN generation components (refer to the documentation on FAN Letter Generation). If it is an e-mail it must be produced using Letter Gen.

Note that manually awarded students will not have a Packaging Plan ID, and so will not be selected by this process. You will need to manually assign the FAN letter to those students.

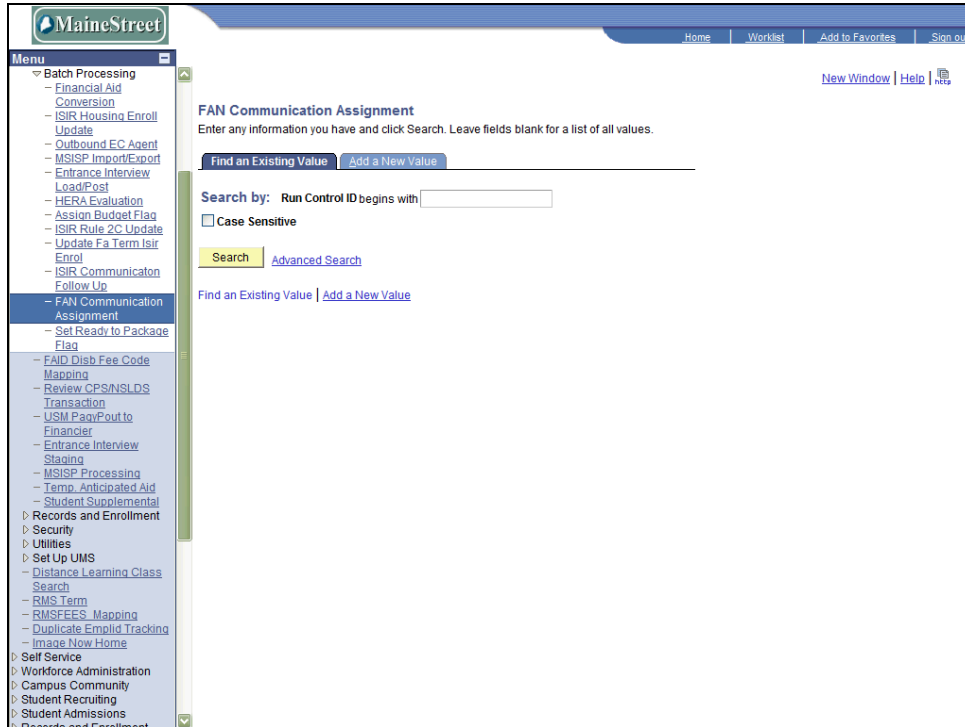
This process may be run in report only mode, or "live" so that students are assigned the communication.

Once a student has had a FAN assigned, it will not be assigned again, even if his/her packaging changes. In the FAN Communication Assignment process you can specify a communication key for an e-mail to be sent to students with revised awards. You flag those students manually via a packaging variable.

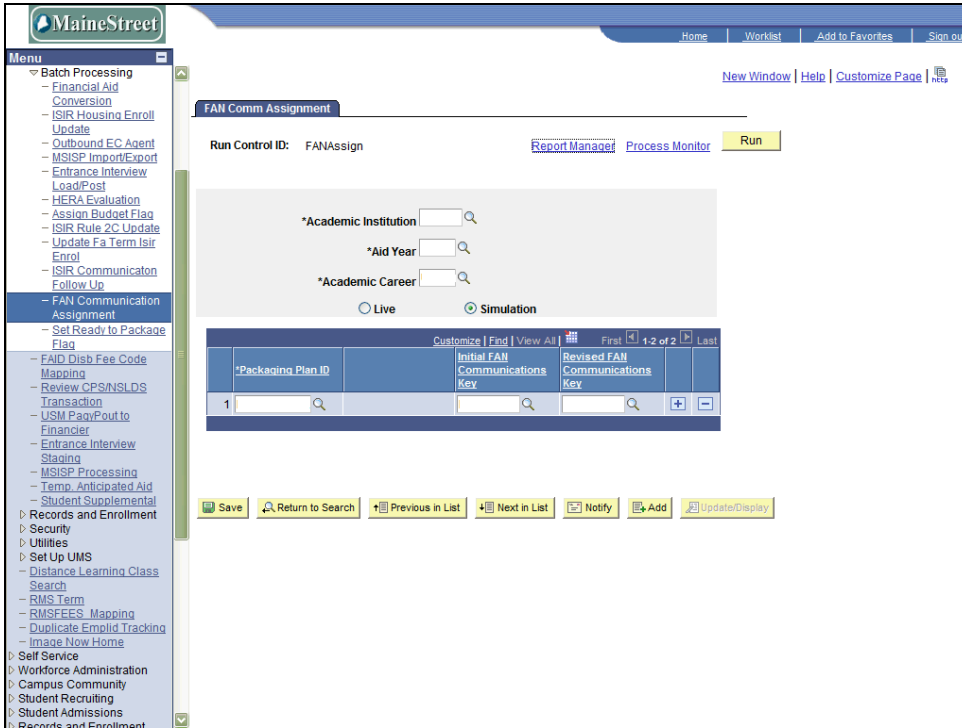
The revised awards e-mail will be sent directly from within the system. You will not need to run Lettergen to generate the e-mail.

## Procedure

Step	Action
1.	Navigate: <b>University of Maine Systems &gt; Financial Aid &gt; Batch Processing &gt; FAN Communication Assignment.</b>



Step	Action
2.	The process requires a <b>Run Control ID</b> . Either select an existing ID or create a new one by clicking the <b>Add a New Value</b> tab, entering a name for the new ID and clicking <b>Add</b> .

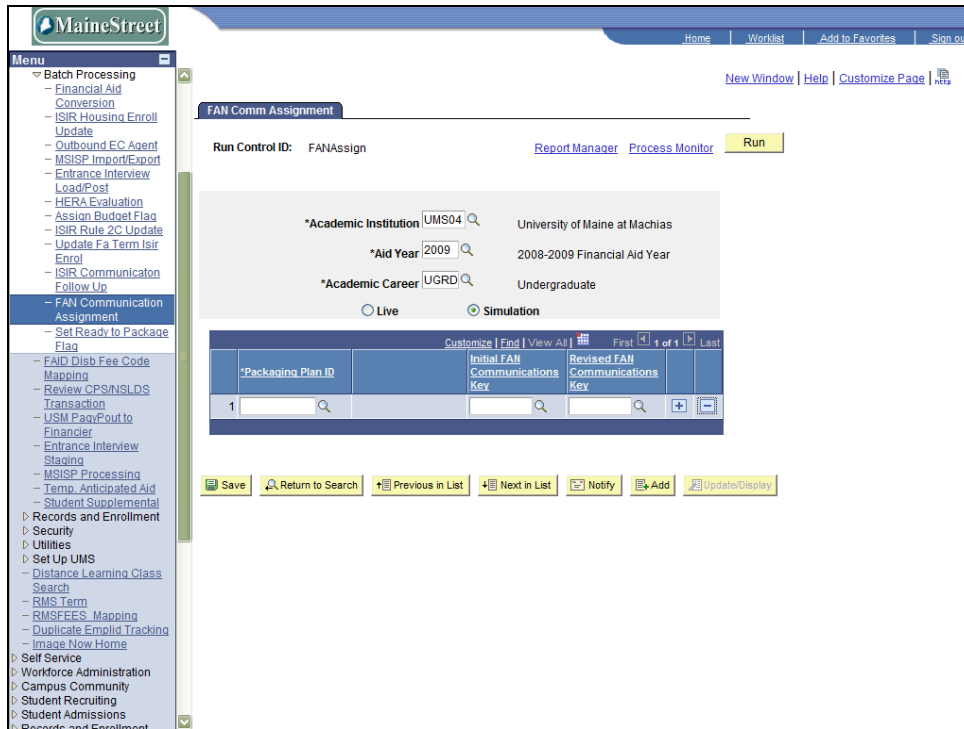


The screenshot shows the 'FAN Comm Assignment' page in the MaineStreet system. The 'Run Control ID' is 'FANAssign'. There are search fields for '\*Academic Institution', '\*Aid Year', and '\*Academic Career'. Below these are radio buttons for 'Live' and 'Simulation', with 'Simulation' selected. A table below shows a list of results with columns for '\*Packaging Plan ID', 'Initial FAN Communications Key', and 'Revised FAN Communications Key'. The table contains one row with the value '1' in the first column. At the bottom of the page are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

Step	Action
3.	<p>Fill in your <b>Institution</b>, <b>Aid Year</b> and <b>Career</b>.</p> <p>The process can be run in Simulation, which will show you a list of students eligible to receive the communication. To do that, leave the <b>Simulation</b> radio button selected.</p> <p>Or you can run the process "Live" which means the communications will be actually assigned to the students. To do this, select the <b>Live</b> radio button.</p>


# Process Document

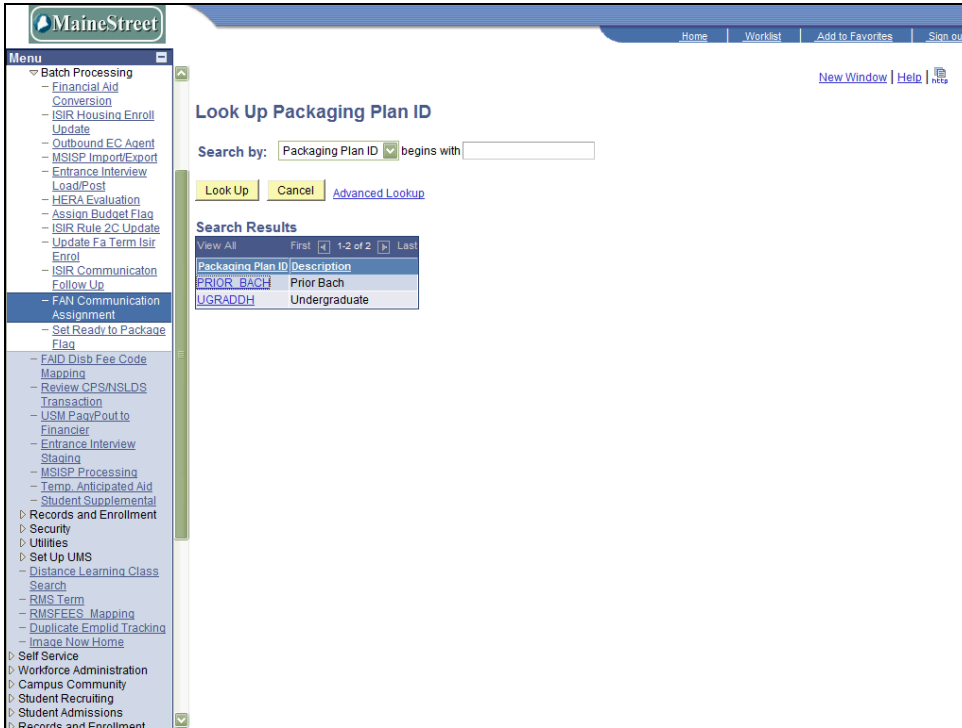
## Financial Aid: FAN Communication Assignment-100808



The screenshot shows the 'FAN Comm Assignment' page in the MaineStreet system. The left-hand menu is expanded to show 'FAN Communication Assignment'. The main area contains the following elements:

- Run Control ID:** FANAssign, with links for [Report Manager](#), [Process Monitor](#), and a **Run** button.
- Search Filters:**
  - \*Academic Institution: UMS04 (University of Maine at Machias)
  - \*Aid Year: 2009 (2008-2009 Financial Aid Year)
  - \*Academic Career: UGRD (Undergraduate)
  - Radio buttons for  Live and  Simulation.
- Data Table:** A table with columns for \*Packaging Plan ID, Initial FAN Communications Key, and Revised FAN Communications Key. The first row shows the value '1' in the first column.
- Navigation and Action Buttons:** Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

Step	Action
4.	<p>You list the Packaging Plan IDs you want to process. This means that students with those Packaging Plan IDs will be evaluated in the process.</p> <p>Click the <b>Packaging Plan ID</b> look up button.</p> 



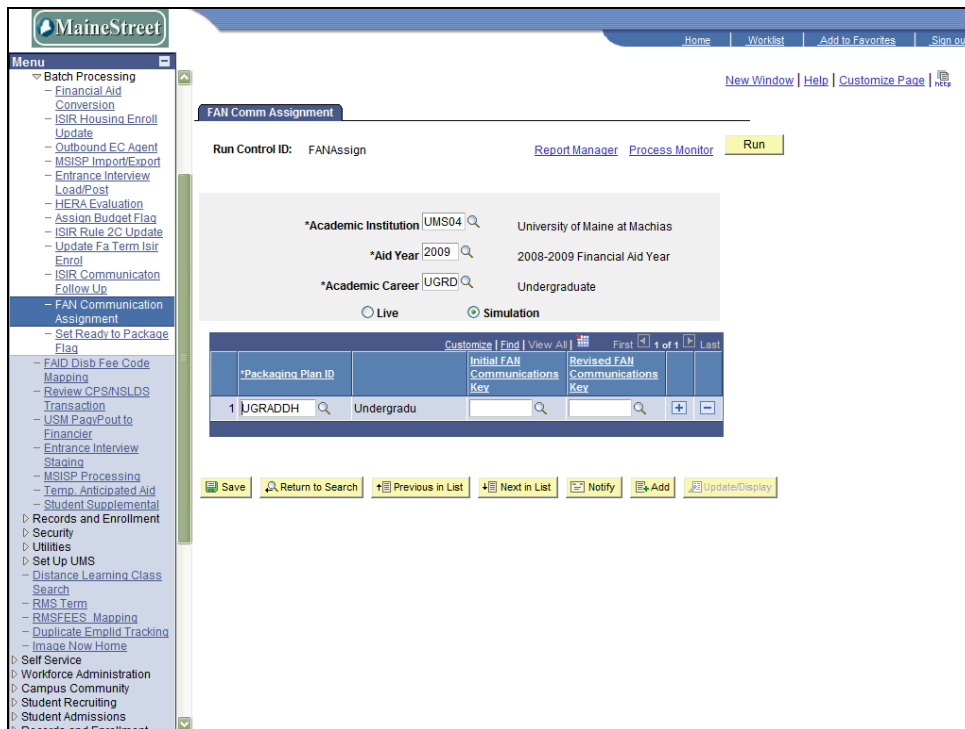
The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'FAN Communication Assignment', and 'Records and Enrollment'. The main content area is titled 'Look Up Packaging Plan ID'. It features a search box with the text 'Search by: Packaging Plan ID begins with' and a search button. Below the search box are buttons for 'Look Up', 'Cancel', and 'Advanced Lookup'. The 'Search Results' section displays a table with two columns: 'Packaging Plan ID' and 'Description'. The results are as follows:


Packaging Plan ID	Description
PRIOR_BACH#	Prior Bach
UGRADDH	Undergraduate

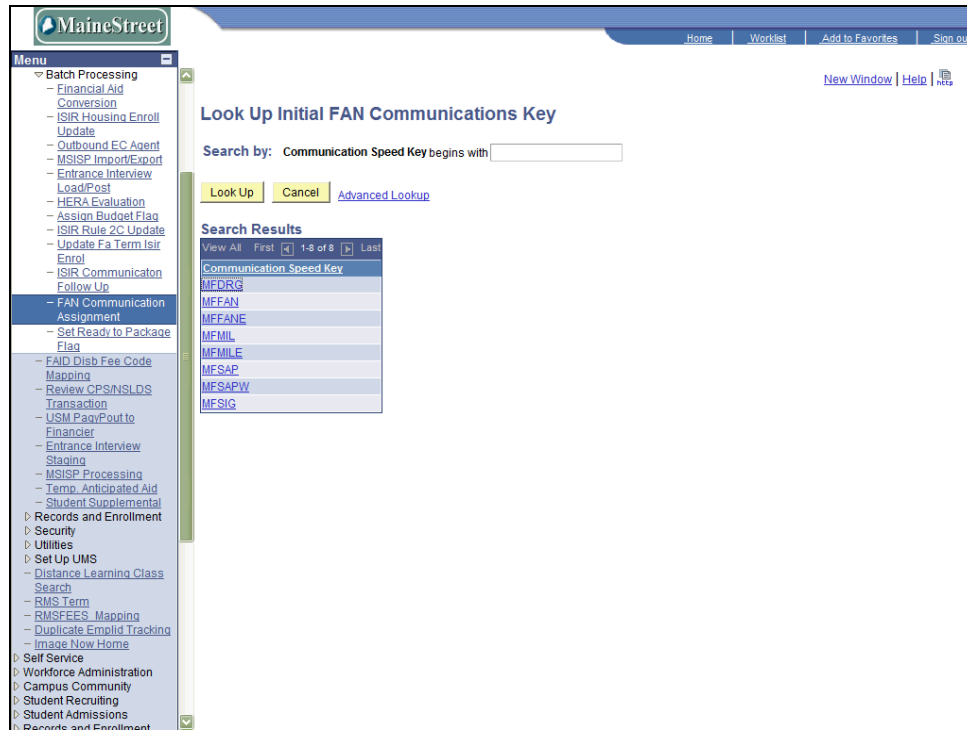
Step	Action
5.	Select a packaging plan from the list.


# Process Document

## Financial Aid: FAN Communication Assignment-100808



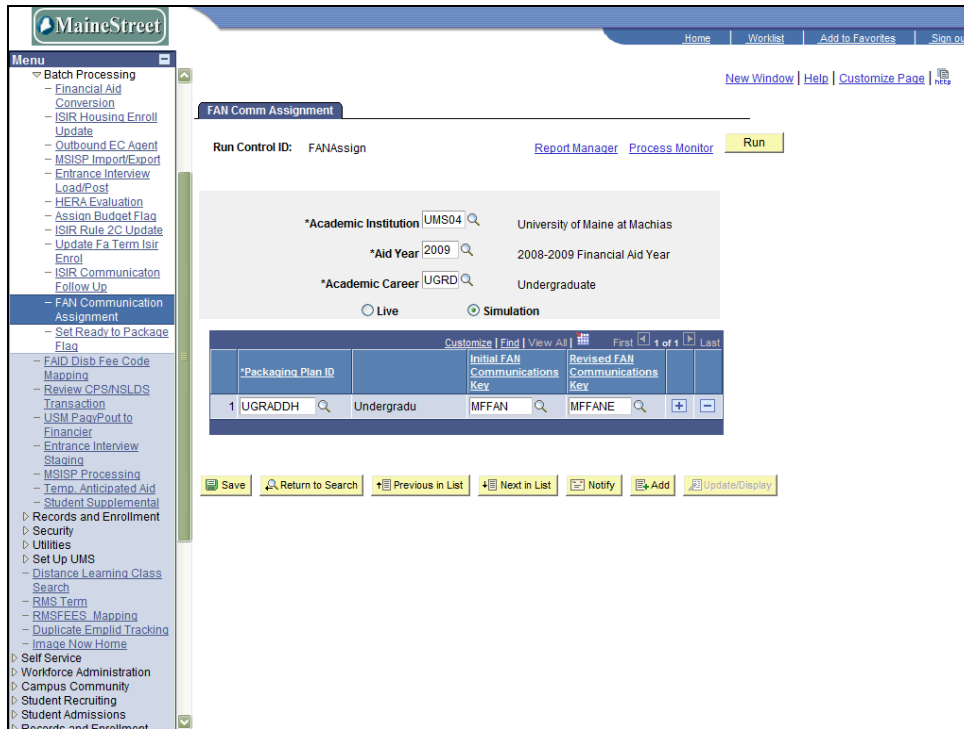
Step	Action
6.	<p>Select the communications key set up for the FAN for this packaging plan. This will only be assigned once to each student.</p> <p>Click the <b>Initial FAN Communications Key</b> button.</p> 




Step	Action
7.	Click an entry in the <b>Communication Speed Key</b> column.
8.	<p>You can optionally assign a communication for students with this packaging plan who have had their awards revised. This would normally be an e-mail telling the student to go to self service to view the awards. The student can be assigned this e-mail multiple times.</p> <p>Click the <b>Revised FAN Communications Key</b> look up button.</p> 
9.	Select the communications key for the revised award e-mail.

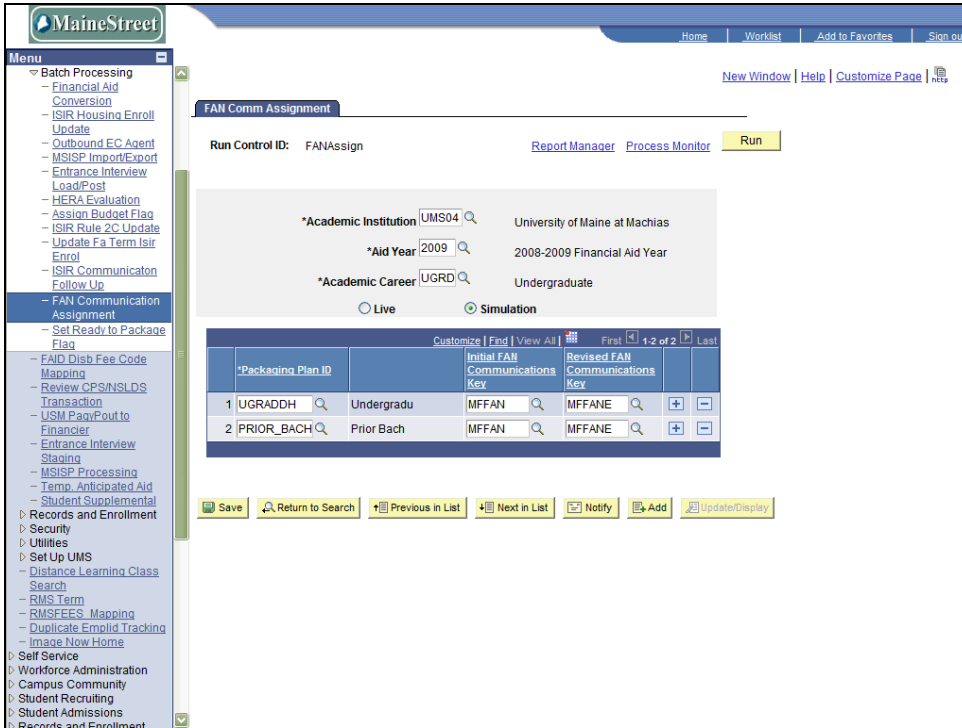
# Process Document


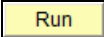
## Financial Aid: FAN Communication Assignment-100808



The screenshot shows the 'MaineStreet' web application interface for 'FAN Comm Assignment'. On the left is a 'Menu' with various options like 'Batch Processing', 'Financial Aid', and 'FAN Communication Assignment'. The main area displays a 'Run Control ID: FANAssign' with buttons for 'Report Manager', 'Process Monitor', and 'Run'. Below this are search fields for 'Academic Institution' (UMS04), 'Academic Year' (2009), and 'Academic Career' (UGRD), with radio buttons for 'Live' and 'Simulation'. A table below shows a list of packaging plans with columns for 'Packaging Plan ID', 'Initial FAN Communications Key', and 'Revised FAN Communications Key'. The table contains one row: '1 UGRADDH Undergradu MFFAN MFFANE'. At the bottom of the table is an 'Add' button (+).

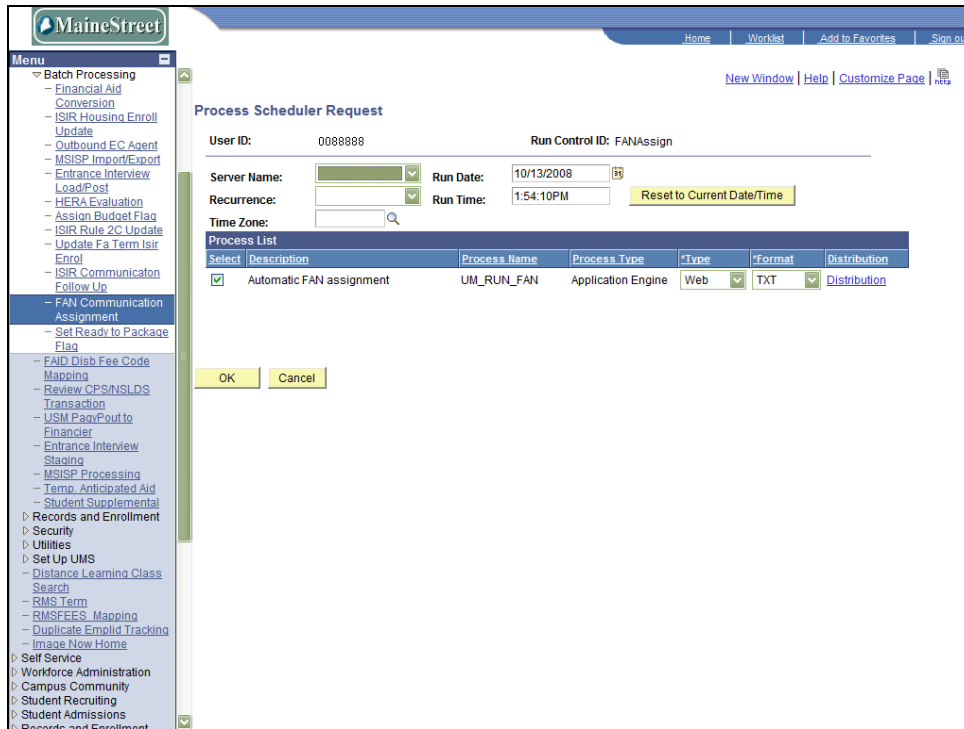
Step	Action
10.	<p>If you have multiple packaging plans to process, add rows for them.</p> <p>Click the <b>Add a new row</b> button.</p> 




Step	Action
11.	<p>Fill in the fields on the new row. Repeat for every packaging plan to be processed. Click the <b>Save</b> button.</p> 
12.	<p>Note that if a student has been manually awarded, he/she will not have a Packaging Plan ID automatically filled in on the Packaging Status Summary page, and consequently will not have the FAN communication assigned. You will need to manually assign the communication.</p> <p>Also, if a student has already been assigned the initial FAN communication, he/she will not be assigned it again. However, the e-mail communications notifying the student of award revisions will be assigned as many times as necessary.</p>
13.	<p>Click the <b>Run</b> button.</p> 

# Process Document

## Financial Aid: FAN Communication Assignment-100808



**MaineStreet** Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | 

### Process Scheduler Request

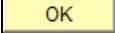
User ID: 0088888 Run Control ID: FANAssign

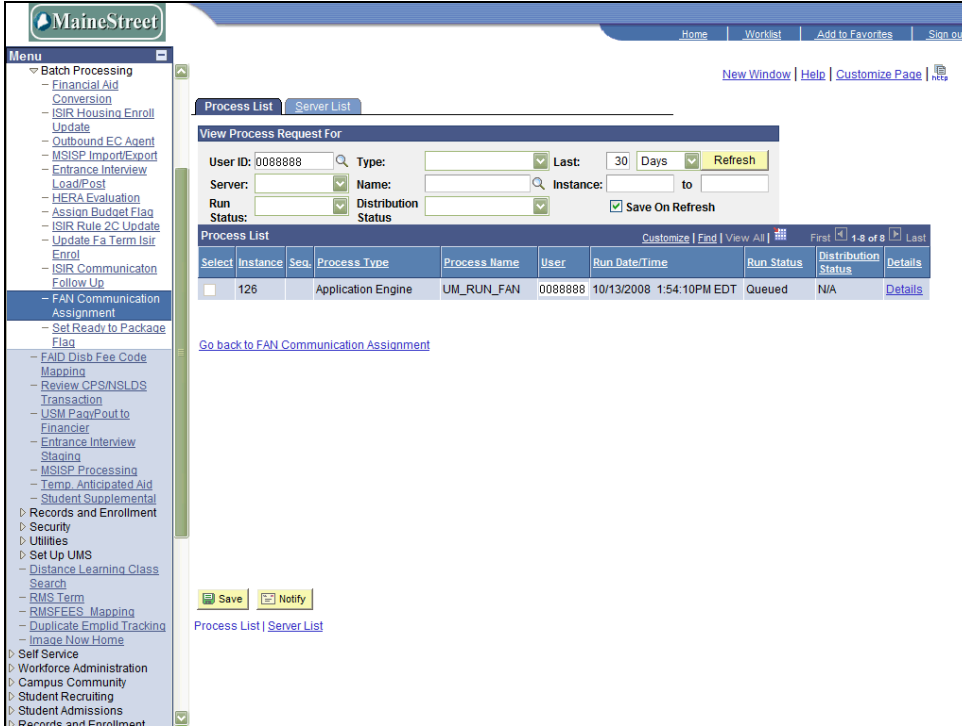
Server Name:  Run Date: 10/13/2008

Recurrence:  Run Time: 1:54:10PM

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Automatic FAN assignment	UM_RUN_FAN	Application Engine	Web	TXT	Distribution

Step	Action
14.	Click the <b>OK</b> button. 
15.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>

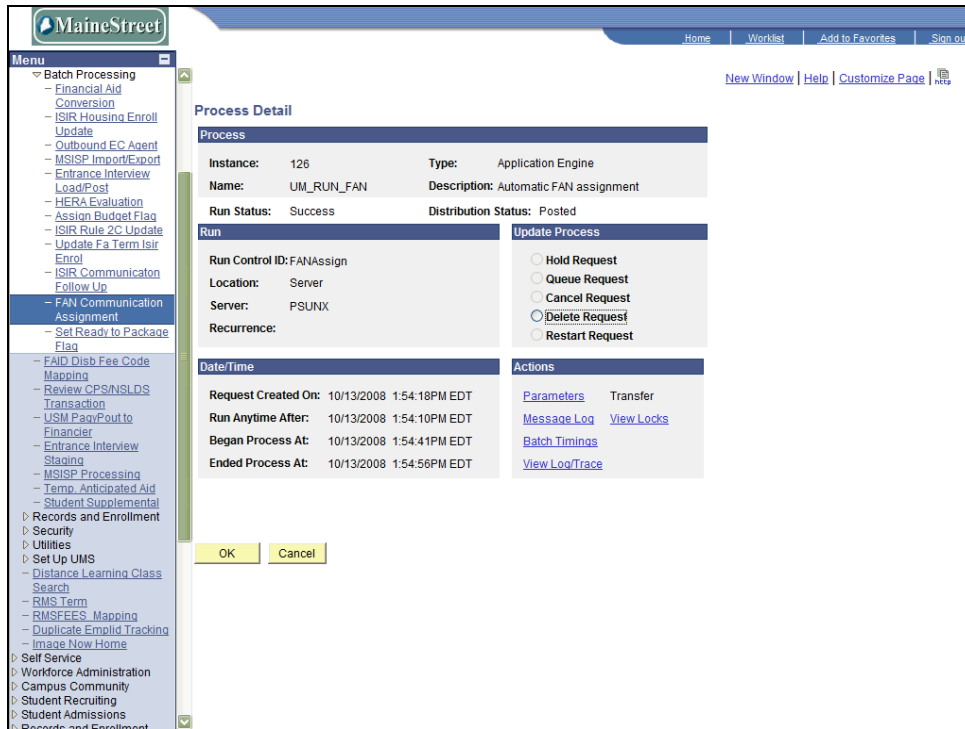


The screenshot shows the MainStreet web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', and 'Self Service'. The main content area is titled 'View Process Request For' and includes a form with fields for 'User ID' (0088888), 'Type', 'Last' (30 Days), 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is visible. Below the form is a 'Process List' table with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with Instance 126, Process Name UM\_RUN\_FAN, User 0088888, Run Date/Time 10/13/2008 1:54:10PM EDT, Run Status Queued, and Distribution Status N/A. A 'Details' link is present for this row. At the bottom of the form area are 'Save' and 'Notify' buttons, and a link to 'Process List | Server List'.

Step	Action
16.	Click the <b>Refresh</b> button from time to time until the <b>Run Status</b> is <i>Success</i> and the <b>Distribution Status</b> is <i>Posted</i> .  <div style="border: 1px solid black; padding: 2px; display: inline-block;">Refresh</div>
17.	Click the <b>Details</b> link.  <div style="border: 1px solid black; padding: 2px; display: inline-block;">Details</div>

# Process Document

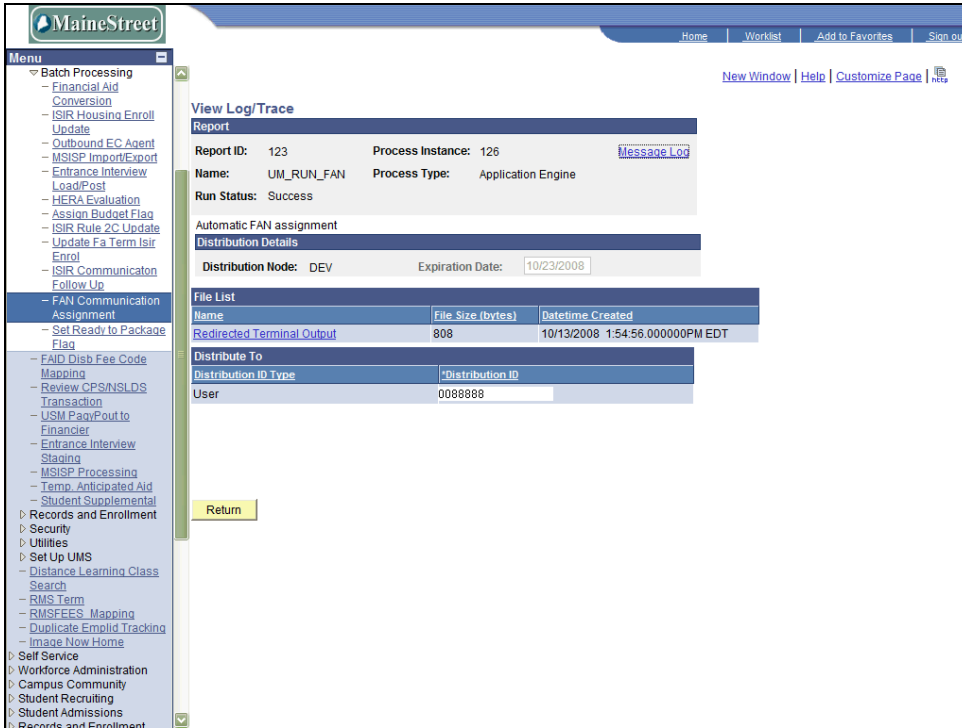
## Financial Aid: FAN Communication Assignment-100808



The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' with various options, including 'FAN Communication Assignment'. The main area displays 'Process Detail' for 'UM\_RUN\_FAN'. The process is an 'Application Engine' with instance 126, running successfully on 10/13/2008 at 1:54:18 PM EDT. Below the details are 'Run' and 'Update Process' sections, and a 'Date/Time' table with 'View Log/Trace' link.

Date/Time	
Request Created On:	10/13/2008 1:54:18PM EDT
Run Anytime After:	10/13/2008 1:54:10PM EDT
Began Process At:	10/13/2008 1:54:41PM EDT
Ended Process At:	10/13/2008 1:54:56PM EDT

Step	Action
18.	Click the <a href="#">View Log/Trace</a> link.



**MaineStreet** Home Worklist Add to Favorites Sign out

**Menu**

- Batch Processing
  - Financial Aid
  - Conversion
  - ISIR Housing Enroll Update
  - Outbound EC Agent
  - MSISP Import/Export
  - Entrance Interview Load/Post
  - HERA Evaluation
  - Assign Budget Flag
  - ISIR Rule 2C Update
  - Update Fa Term Isir Enroll
  - ISIR Communication Follow Up
  - FAN Communication Assignment
  - Set Ready to Package Flag
  - FAID Disb Fee Code Mapping
  - Review CPS/NSLDS Transaction
  - USM Pay/Paid to Financier
  - Entrance Interview Staging
  - MSISP Processing
  - Temp. Anticipated Aid
  - Student Supplemental
- Records and Enrollment
- Security
- Utilities
- Set Up UMS
  - Distance Learning Class Search
  - RMS Term
  - RMSFEES Mapping
  - Duplicate Emplid Tracking
  - Image Now Home
- Self Service
- Workforce Administration
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment

**View Log/Trace** [New Window](#) [Help](#) [Customize Page](#) 

**Report**

Report ID: 123 Process Instance: 126 [Message Log](#)

Name: UM\_RUN\_FAN Process Type: Application Engine

Run Status: Success

Automatic FAN assignment

**Distribution Details**

Distribution Node: DEV Expiration Date: 10/23/2008

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">Redirected Terminal Output</a>	808	10/13/2008 1:54:56.000000PM EDT

**Distribute To**

Distribution ID Type	Distribution ID
User	008888

[Return](#)

Step	Action
19.	To review the list of students selected for the communication(s), click "Redirected Terminal Output." <a href="#">Redirected Terminal Output</a>

```

PeopleTools 8.46.17 - Application Engine Server
Copyright (c) 1988-2008 PeopleSoft, Inc.
All Rights Reserved

PSAESRV started service request at 13.54.41 2008-10-13

**** Simulation mode requested for Packaging Plan PRIOR_BACH
**** Simulation mode requested for Packaging Plan UGRADDH

Creating Initial MFFAN record for emplid: 0900000
Creating Initial MFFAN record for emplid: 0999999
Creating Initial MFFAN record for emplid: 0909090
Creating Initial MFFAN record for emplid: 0999999
*****

Number of Initial FANs created: 4
Number of Revised FANs created: 0
*****
Application Engine program UM_RUN_FAN ended normally
    
```

Step	Action
20.	<p>A new window opens containing the report. In this case the process was run in simulation so no communications were actually assigned to students.</p> <p>When you run "live" you can verify the results of the process by checking the communications for students whose emplids are listed in this report.</p>
21.	<p>In order to assign the awards revision e-mail to a student, the process must be able to identify those students whose awards have changed. This is done manually by setting a Packaging Variable for each student. After the awards revision communication has been assigned to a student, the Packaging Variable for the student is cleared.</p> <p>To set Packaging Variables, navigate: <b>Financial Aid &gt; Awards &gt; Award Processing &gt; Assign Packaging Variables.</b></p>

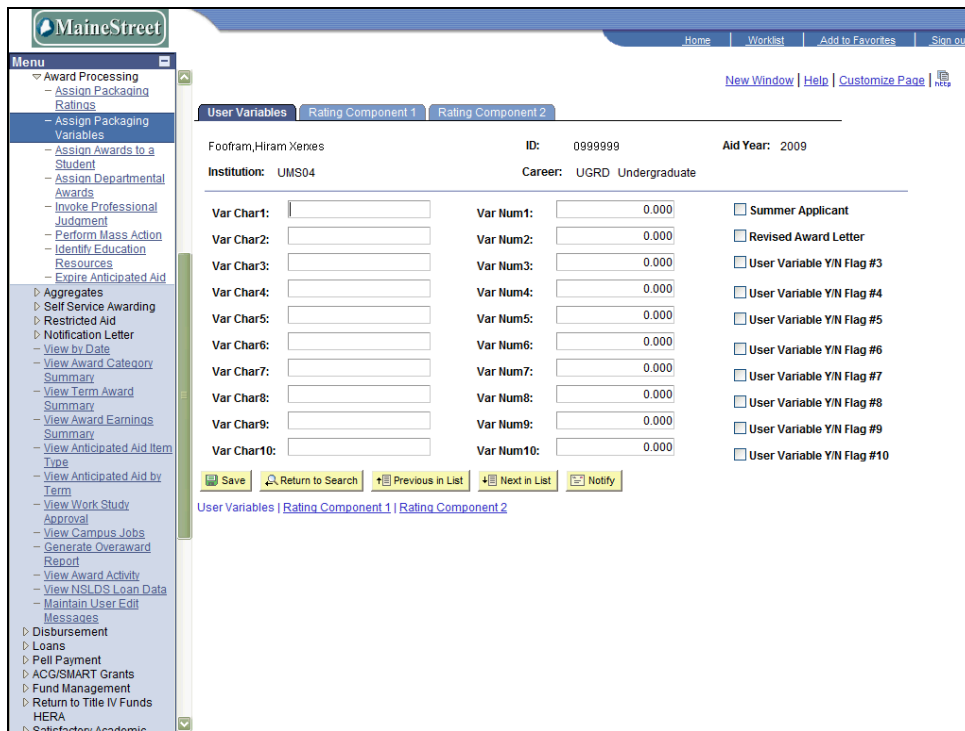


The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with various options like 'Award Processing', 'Packaging Variables', and 'Disbursement'. The main area is titled 'Packaging Variables' and contains a search form. Below the title, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button above a search bar. The search form includes several fields: 'ID:' (with a dropdown set to 'begins with'), 'Academic Institution:' (with a dropdown set to '=' and a text box containing 'UMS04'), 'Aid Year:' (with a dropdown set to '=' and a text box containing '2009'), 'Academic Career:' (with a dropdown set to '='), 'Campus ID:' (with a dropdown set to 'begins with'), 'Last Name:' (with a dropdown set to 'begins with'), and 'First Name:' (with a dropdown set to 'begins with'). At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
22.	Enter search criteria to identify the student and click <b>Search</b> .

# Process Document

## Financial Aid: FAN Communication Assignment-100808



Step	Action
23.	The Packaging Variable to use is " <b>Revised Award Letter.</b> " Click the <b>Revised Award Letter</b> option to select it. <input type="checkbox"/> Revised Award Letter
24.	Click the <b>Save</b> button.  Next time you run the FAN Communication Assignment process for this student's packaging plan, he/she will be assigned the revised awards e-mail.  The e-mail will be handled directly by the system, and will be sent through a batch process. You will not need to use Lettergen to generate the e-mail. <input type="button" value="Save"/>
25.	<b>End of Procedure.</b>