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## **ISIR Communication Follow Up**

### **Concept**

The ISIR 2C process can be used to assign a checklist and a corresponding communication to students who meet certain criteria. You may wish to send subsequent communications reminding the students to complete the checklist items. If the students don't complete the items within a certain timeframe, you may wish to send another reminder. The ISIR Communication Follow Up process is used to automatically assign these reminder letters to students.

The follow up communications are typically generic e-mails based on templates set up by each Institution. The e-mails are assigned to students as normal communications, but are immediately marked as completed. The actual generation of the e-mails is handled internally and sent via a batch process, rather than by using Lettergen. You may choose to send paper follow up letters in which case the traditional Letter Gen process would need to be run.

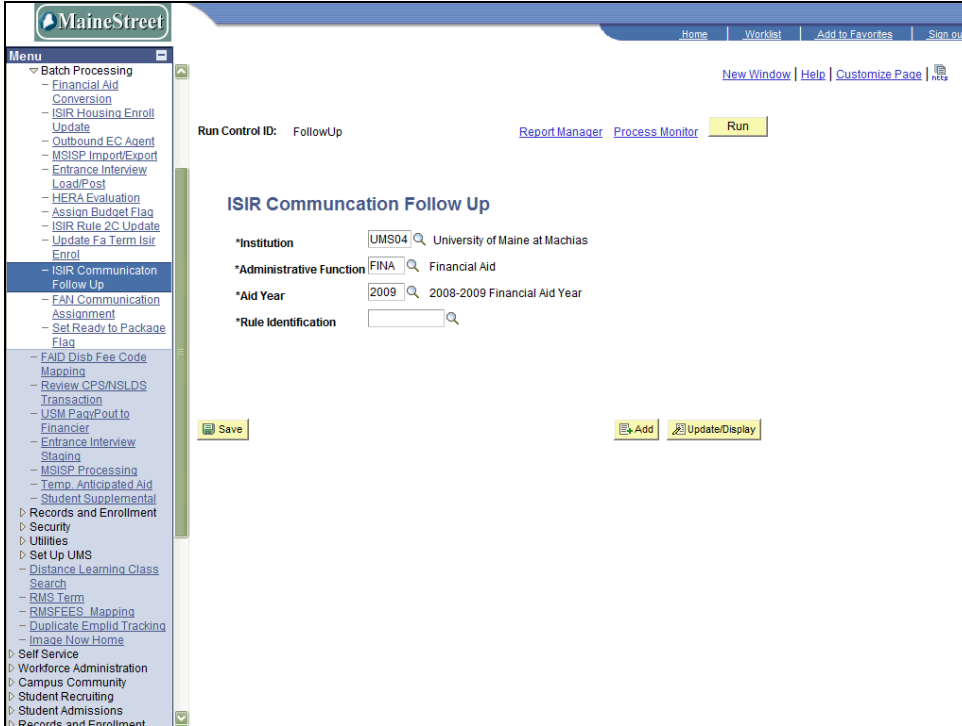
## Procedure

Step	Action
1.	<p>A student has been assigned a checklist and a missing items letter via the ISIR 2C process. The student has not completed all the checklist items, leaving the checklist in "initiated" status.</p> <p>The ISIR Communication Follow Up process will assign a follow up e-mail to the student.</p> <p>Navigate: <b>University of Maine Systems &gt; Financial Aid &gt; Batch Processing &gt; ISIR Communication Follow Up.</b></p>


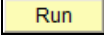


If your security allows, you can view the e-mail template that contains the wording of the follow up e-mail. Navigate to: University of Maine Systems > Set Up UMS > E-mail Templates.

Step	Action
2.	<p>The process requires a <b>Run Control ID</b>. Either select an existing Run Control ID or create a new one.</p> <p>To create a new Run Control ID, click the <b>Add a New Value</b> tab, enter a name for the new ID and click <b>Add</b>.</p>
3.	<p>Enter your <b>Institution</b>, the <b>Administrative Function</b> (FINA), and <b>Aid Year</b>.</p>

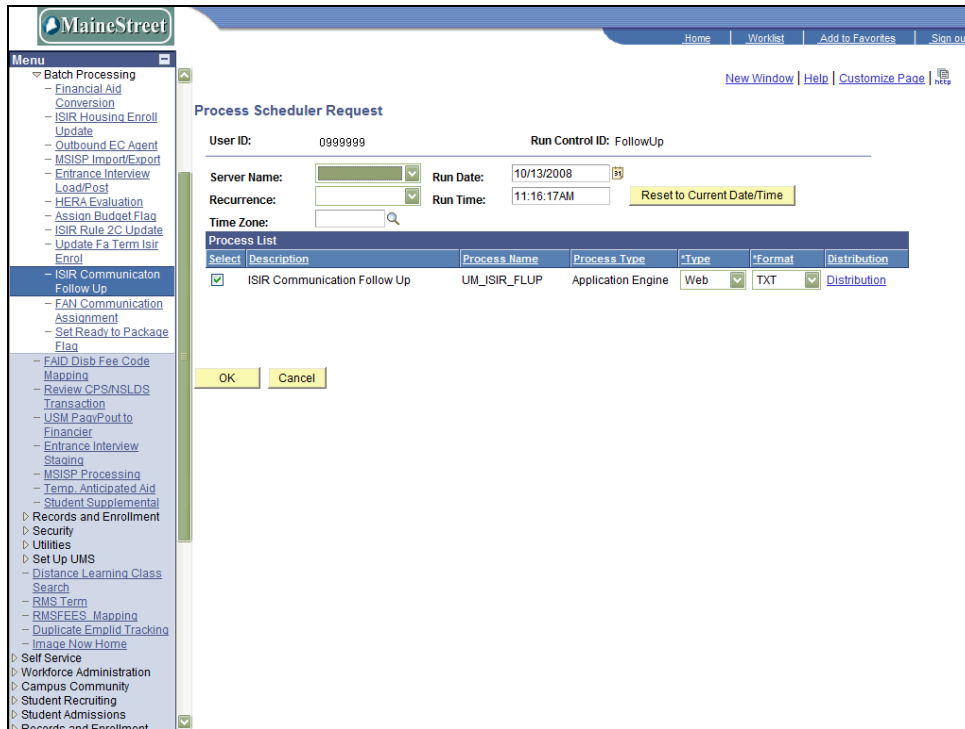


The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', and 'Self Service'. The main content area is titled 'ISIR Communication Follow Up'. It features a 'Run Control ID: FollowUp' and a 'Run' button. Below this are search fields for '\*Institution' (UMS04 - University of Maine at Machias), '\*Administrative Function' (FINA - Financial Aid), and '\*Aid Year' (2009 - 2008-2009 Financial Aid Year). There is also an empty '\*Rule Identification' field. At the bottom of the form are 'Save', 'Add', and 'Update/Display' buttons.


Step	Action
4.	The <b>Rule Identification</b> field must match the Rule used by the ISIR 2C process when the original checklist and communication were assigned.  Click the <b>Look up Rule Identification</b> button. 
5.	Select the correct Rule from the list.
6.	Click the <b>Save</b> button.
7.	Click the <b>Run</b> button. 

# Process Document

## Financial Aid: ISIR Communication Follow Up-100208



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

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

**Process Scheduler Request**

User ID: 0999999 Run Control ID: FollowUp

Server Name: [Dropdown] Run Date: 10/13/2008 [BT]

Recurrence: [Dropdown] Run Time: 11:16:17AM [Reset to Current Date/Time](#)

Time Zone: [Dropdown]

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	ISIR Communication Follow Up	UM_ISIR_FLUP	Application Engine	Web	TXT	<a href="#">Distribution</a>

[OK](#) [Cancel](#)

Step	Action
8.	Click the <b>OK</b> button. Click the <b>Process Monitor</b> link.



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', 'Security', 'Utilities', 'Set Up UMS', 'Search', 'Self Service', 'Workforce Administration', 'Campus Community', 'Student Recruiting', and 'Student Admissions'. The 'ISIR Communication Follow Up' option is selected under 'Batch Processing'. The main content area displays the configuration for 'ISIR Communication Follow Up'. It includes a 'Run Control ID' of 'FollowUp', a 'Run' button, and a 'Process Instance' of '121'. Below this, there are four search fields: '\*Institution' (UMS04 University of Maine at Machias), '\*Administrative Function' (FINA Financial Aid), '\*Aid Year' (2009 2008-2009 Financial Aid Year), and '\*Rule Identification' (MF9\_ISIR UMM ISIR Requirements). At the bottom of the configuration area are 'Save', 'Add', and 'Update/Display' buttons.

Step	Action
9.	<p>Click <b>Refresh</b> from time to time until the <b>Run Status</b> is <i>Success</i> and the <b>Distribution Status</b> is <i>Posted</i>. Click the <b>Details</b> link and then <b>View Log/Trace</b> to see a report of the students assigned follow up e-mails.</p> <p>To verify the assignment, check the communications for the students. The e-mail should be assigned and completed.</p>
10.	<b>End of Procedure.</b>