

Profile Status, Alerts, Cases, & Advisor Center

SUNAPSIS[®]

AN INDIANA UNIVERSITY INNOVATION

Rebuilt Profile Status

Ubiquitously Accessible
Everywhere



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Places with Profile Information

Student / Scholar Record,
Search Screen,
Case Tracker, Alert Lists,
Checklists, SEVIS Batch Mgt,
Front Desk Check-in, Doc-Check,
and so on...

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DONG SEOK KIM

TEMP192547 (100940) | N0000091683

Profile Management

F-1 Batch Suspended in Approved / Uploaded ...

The batch record for Reprint Document was Batch Approved on 08/08/2018 but remains in Batch Approved status. It should be reviewed for any server issues along with re-submission to SEVIS batch or RTI action or removal.

F-1 Batch Suspended in Approved / Uploaded ...

The batch record for Reprint Document was Batch Approved on 08/17/2017 but remains in Batch Approved status. It should be reviewed for any server issues along with re-submission to SEVIS batch or RTI action or removal.

F-1 Batch Suspended in Approved / Uploaded ...

Record Management

Document Management

Workflow Management

SEVIS Management

Advisor Center

Profile Information

Primary Name: Dong Seok Kim

Gender | DOB | Age: Male | 09/08/1975 | 43

Campus: Bloomington

University ID: TEMP192547 (100940) | 0379297447

Email: jlbaumga@iu.edu, jlbaumga@indiana.edu

Network ID: jlbaumga

Phone: 812-855-6358 (US)

Country: Spain

Visa: N0000091683 | F-1 Demo Campus

Passport | Visa Expiration: 12/03/2025 | 08/09/2023

HIGH PRIORITY NOTES AND CASES

TYPE DETAILS	DATE / TIME	ADDED BY / ASSIGNED TO
Case F-1 Notes Alert	01/30/2019 -----	Jason Baumgartner
Note nomen gravis non linguens pladior gravu ***	12/23/2018 -----	Darrin Eaton
Case Manual Case Assignment	08/13/2018 -----	Jason Baumgartner
Note nomen gravis non linguens pladior gravu ***	05/07/2018 -----	Darrin Eaton
Note nomen gravis non linguens pladior gravu ***	03/05/2018 -----	John Paul II
Note plorum cognitio, Pro non si in Sed vol ***	12/20/2017 -----	Tim Climis
Note Urgent Missing Fedora	10/05/2017 02:33 PM	Jason Baumgartner
Note brevens, quoque non Tam plorum e quac ***	06/12/2017 -----	Nik Spurgetis
Note nomen gravis non linguens pladior gravu ***	02/15/2017 12:46 PM	John Paul II

ALERT SUMMARY INFORMATION

ALERT NAME	LAST COMMUNICATION	ASSIGNED TO
F-1 Batch Suspended in Approved / Uploaded S ***	(no last communication)	(unassigned)

Delivered with v4.0

- 14 different structures built in 2018 with well over 100+ data point considerations
- Every profile status request received at the 2017 sunapsis conference u-buildit event was prioritize and developed in 2018 for the v4.0 release!

Current 14 Structures

Bio/Demo Profile Information, High Priority Notes and Cases, Alert Summary Information, SEVIS Immigration Information, Active J-1 Site of Activity, Sponsored Student Information, External Immigration Document, SEVIS Employment Authorization Information, Non-SEVIS Employment Authorization Information, Active Employee Information, Permanent Residence Information, Current and Upcoming Academic Information, Last Actions on File, Contact Information

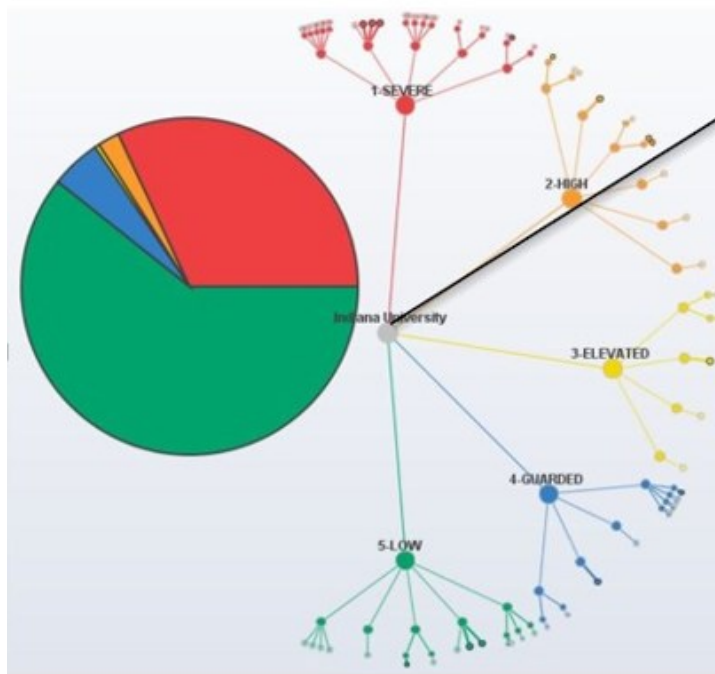
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More about Profile Status

- If a structure is not applicable then it doesn't appear.
- It's a pluggable component, so schools with technical capability can override, remove, or add profile views.
- After the release will review by next conference new data, configuration options, or other features to build around profile statuses in v4.1+ planning.

Alerts Management

It's bittersweet, but sunapsis has retired the Alert Tree!



Control Center Alerts Management X

Indiana University

Alert Summaries: 14

	Area	Type	Name	Count
1	F-1 Students	Enrollment Issues	F-1 Active SEVIS Record and Online Academic Program	16
2	F-1 Students	Enrollment Issues	F-1 Review for Registration	1
3	F-1 Students	Enrollment Issues	F-1 with Initial, Transfer, Change of Status I-20 with admission to Online ...	62
4	F-1 Students	Missing Information	F-1 Missing Institutional Linkage	588
5	F-1 Students	Missing Information	F-1 Missing SEVIS Financial	200
6	F-1 Students	Missing Information	F-1 Missing SEVIS Organization Code Information	240
7	F-1 Students	Missing Information	F-1 Missing SEVIS Principal Name	1001
8	F-1 Students	Missing Information	F-1 Missing Dependent Information	36
9	F-1 Students	Missing Information	F-1 Missing SEVIS Financial	2
10	F-1 Students	Missing Information	F-1 Missing SEVIS Financial	3
11	F-1 Students	Missing Information	F-1 Missing SEVIS Financial	1
12	F-1 Students	Missing Information	F-1 Missing Dependent Information	1
13	F-1 Students	Missing Information	F-1 Missing SEVIS Financial	39
14	F-1 Students	Missing Information	F-1 Missing an Email Address on File	22

FILTER AREAS

- ☒ F-1 Students
- ☐ J-1 Students
- ☐ J-1 Scholars
- ☐ H-1B Employees
- ☐ Permanent Residency
- ☐ Other

FILTER TYPES

- ☐ E-Form Requests
- ☐ SEVIS Batch
- ☐ Admission Issues
- ☒ Enrollment Issues
- ☒ Missing Information
- ☐ Various Issues

- Allows more flexibility
- Displays in a linear view
- Provides dynamic filtering
- Keeps 3.x threat levels and colors
- Displays record counts
- Uses screen space more efficiently

Alerts Management

Control Center

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PROFILE MANAGEMENT

[Search International Profiles](#)

[New Profile Record](#)

[Merge Profile Records](#)

[Delete Profile Record](#)



SEVIS MANAGEMENT

[RTI Embedded Browser](#)

[Batch Management](#)

[Transfer-In Management](#)

[Extract Discrepancy Management](#)



WORKFLOW MANAGEMENT

[Case Management](#)

[Alerts Management](#)

[Checklist Management](#)

[Check-in Management](#)

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Alerts Management — Active Alert Lists

Control Center Alerts Management X

Indiana University Select Alert Group Alert Summaries: 23

Select the desired filters.

View the results on the right

FILTER AREAS

- ☒ F-1 Students
- ☐ J-1 Students
- ☐ J-1 Scholars
- ☐ H-1B Employees
- ☐ Permanent Residency
- ☐ Other

FILTER TYPES

- ☒ E-Form Requests
- ☒ SEVIS Batch
- ☐ Admission Issues
- ☒ Enrollment Issues
- ☐ Missing Information
- ☐ Various Issues

FILTER LEVELS

- ☒ Severe
- ☒ High
- ☒ Elevated
- ☒ Guarded

!	☆	Area	Type	Name	Count
!	☆	F-1 Students	E-Form Requests	F-1 Add a New Dependent (e-form)	10
!	☆	F-1 Students	E-Form Requests	F-1 Replace Lost Document (e-form)	1
!	☆	F-1 Students	E-Form Requests	F-1 Travel Signature Request (e-form)	3
!	☆	F-1 Students	Enrollment Issues	F-1 Active SEVIS Record and Online Academic Program	15
!	☆	F-1 Students	Enrollment Issues	F-1 Review for Registration	21
!	☆	F-1 Students	Enrollment Issues	F-1 with Initial, Transfer, Change of Status I-20 with admission to Online ...	62
!	☆	F-1 Students	SEVIS Batch	F-1 Batch Suspended in Approved / Uploaded Status	436
!	☆	F-1 Students	SEVIS Batch	F-1 Duplicate Pending SEVIS Batch Records	34
!	☆	F-1 Students	SEVIS Batch	F-1 Prolonged Pending / Approved Batch Records	497
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Cancel Student	2
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Failures	472
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch OPT Employment STEM 6 Month Reporting	1
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Update Biographical Information	8
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Update Communication	8
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Update Program Information	3
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Update US Address	4
!	☆	F-1 Students	SEVIS Batch	F-1 Unable to Build SEVIS Batch Records	36
!	☆	F-1 Students	E-Form Requests	F-1 Address Update Submitted (e-form)	3
!	☆	F-1 Students	Enrollment Issues	F-1 Review for Registration	1
!	☆	F-1 Students	SEVIS Batch	F-1 SEVIS Batch Update Biographical Information	1
!	☆	F-1 Students	E-Form Requests	F-1 CPT: Academic Advisor Verification (e-form)	1
!	☆	F-1 Students	E-Form Requests	F-1 CPT: Offer Letter Verification (e-form)	1
!	☆	F-1 Students	Enrollment Issues	F-1 Review for Registration	1

Alerts Management — Active Alert List

Additional options for Alerts Management are located under the filters in the left menu.

See the KB for more information:

[SUN4: Control Center - Workflow Management - Alerts Management Beta 3](#)



ADDITIONAL OPTIONS

[Refresh Alert Summaries Listing](#)

[Export Summary List to Excel](#)

[Selected Rows in Combined Alert List](#)

[My Tagged / Alert Case Configurations](#)

[Clear Alert Summary Cache](#)

Last Cached: 07/11/2018 11:36 AM

Alerts Management — Active Alert List



☒ FILTER TAGS

☒ Tagged by Me

☒ Not Tagged by Me



ADDITIONAL OPTIONS

[Refresh Alert Summaries Listing](#)

[Export Summary List to Excel](#)

[Selected Rows in Combined Alert List](#)

[My Tagged / Alert Case Configurations](#)

[Clear Alert Summary Cache](#)

Last Cached: 08/29/2018 07:59 AM








Alerts Management — Active Alert List


Control Center

Alerts Management

Alert Case Configurations X

ALERT CASE CONFIGURATIONS





▼ New Records

F-1 Student | F-1 Admit to Review for SEVIS Document

F-1 Student | F-1 Missing SEVIS Program

F-1 Student | F-1 Review for Registration

Draft Record to be Saved

Alert Group *

Alert Name *

Alert Level

Assign to Case

Assign as High Priority Case

Selection Range

(first character of last name or last digit of university ID)

OPTIONAL DEPARTMENTAL FILTER CONFIGURATIONS

Academic/Employee Type

Campus

College

Indiana University

KathyAbell

F-1 Review for Registration

F-1 Review Institutional Immigration Status

F-1 Review Major / Minor

F-1 Review New Degree Program

F-1 Review SEVIS Status - Change of Status

F-1 Review SEVIS Status - Transfer

F-1 SEVIS Batch Active Student Registration

F-1 SEVIS Batch Cancel Student

F-1 SEVIS Batch Failures

F-1 SEVIS Batch Initial Student Registration

F-1 SEVIS Batch Review for Transfer / COS

F-1 SEVIS Batch Update Biographical Inform

F-1 SEVIS Batch Update Communication

F-1 SEVIS Batch Update Program Informatic

F-1 SEVIS Batch Update US Address

Alerts Management – Active Alert List

 ☒ FILTER TAGS


☒ Tagged by Me

☒ Not Tagged by Me

 ADDITIONAL OPTIONS

[Refresh Alert Summaries Listing](#)

[Export Summary List to Excel](#)



!	★▼	Area	Type	Name	Count
!	★	F-1 Students	Enrollment Issues	F-1 Review for Registration	21
!	★	F-1 Students	Missing Information	F-1 Missing SEVIS Program	7
!	★	F-1 Students	Admission Issues	F-1 Admit to Review for SEVIS Document	15
!	★	F-1 Students	Admission Issues	F-1 Admit to Review for SEVIS Document	33
!	★	F-1 Students	Enrollment Issues	F-1 Review for Registration	2
!	★	F-1 Students	Enrollment Issues	F-1 Active SEVIS Record and Online Academic Program	24
!	★	F-1 Students	Enrollment Issues	F-1 Other Graduate Excessive Online Enrollment	1
!	★	F-1 Students	Enrollment Issues	F-1 Withdrawn from Courses	17

Alerts Management — Alert List Details

International Office Module | SUNAPSIS

Control Center Alerts Management X

Indiana University

Alert Summaries: 108

☒ FILTER AREAS

- ☒ F-1 Students
- ☒ J-1 Students

!	☆	Area	Type	Name	Count
!	☆	F-1 Students	E-Form Requests	F-1 Add a New Dependent (e-form)	10
!	☆	F-1 Students	E-Form Requests	F-1 Replace Lost Document (e-form)	1
!	☆	F-1 Students	E-Form Requests	F-1 Travel Signature Request (e-form)	3
!	☆	F-1 Students	Enrollment Issues	F-1 Active SEVIS Record and Online Academic Program	15
!	☆	F-1 Students	Enrollment Issues	F-1 Review for Registration	21
!	☆	F-1 Students	Enrollment Issues	F-1 with Initial, Transfer, Change of Status I-20 with admission to Online ...	62

Control Center Alerts Management Alert F-1 Add a New Dependent (e-form) X

Alerts on File: 10

Client Full Name	SEVIS Number	University ID	Description	Duration	Alert Case Assignment	Last Emailed
Baumgartner, Jason	N0000148969	x999999999	09/30/2015 Add a New Dependent (SEVIS Documen...	1		
Kalakaua III, Nalani	N0000160483	TEMP464194	02/09/2016 Add a New Dependent (SEVIS Documen...	1		
Lee, Paola	N0000143689	TEMP228302	10/09/2015 Add a New Dependent (SEVIS Documen...	1		
Owens, Sammy	N0000148268	TEMP474370	06/24/2015 Add a New Dependent (SEVIS Documen...	1		
Peralta, Bryan	N0000151881	TEMP570655	11/11/2015 Add a New Dependent (SEVIS Documen...	1		
Reynolds, Matt O	N0000147542	TEMP913469	07/28/2015 Add a New Dependent (SEVIS Documen...	1		
Reynolds, Matthew Otis	N0000142428	TEMP933100	07/23/2015 Add a New Dependent (SEVIS Documen...	1		
Ruan, Lim		TEMP517392	12/15/2015 Add a New Dependent (SEVIS Documen...	1		
Yeung, Yan DEMO		TEMP641879	06/21/2016 Add a New Dependent (SEVIS Documen...	1		
Yuan, Jianong TEST	N0000141995	TEMP651054	04/07/2015 Add a New Dependent (SEVIS Documen...	1		

PROFILE INFORMATION

Preferred Name: Jason Baumgartner, Sr.

Primary Name: Jason Baumgartner

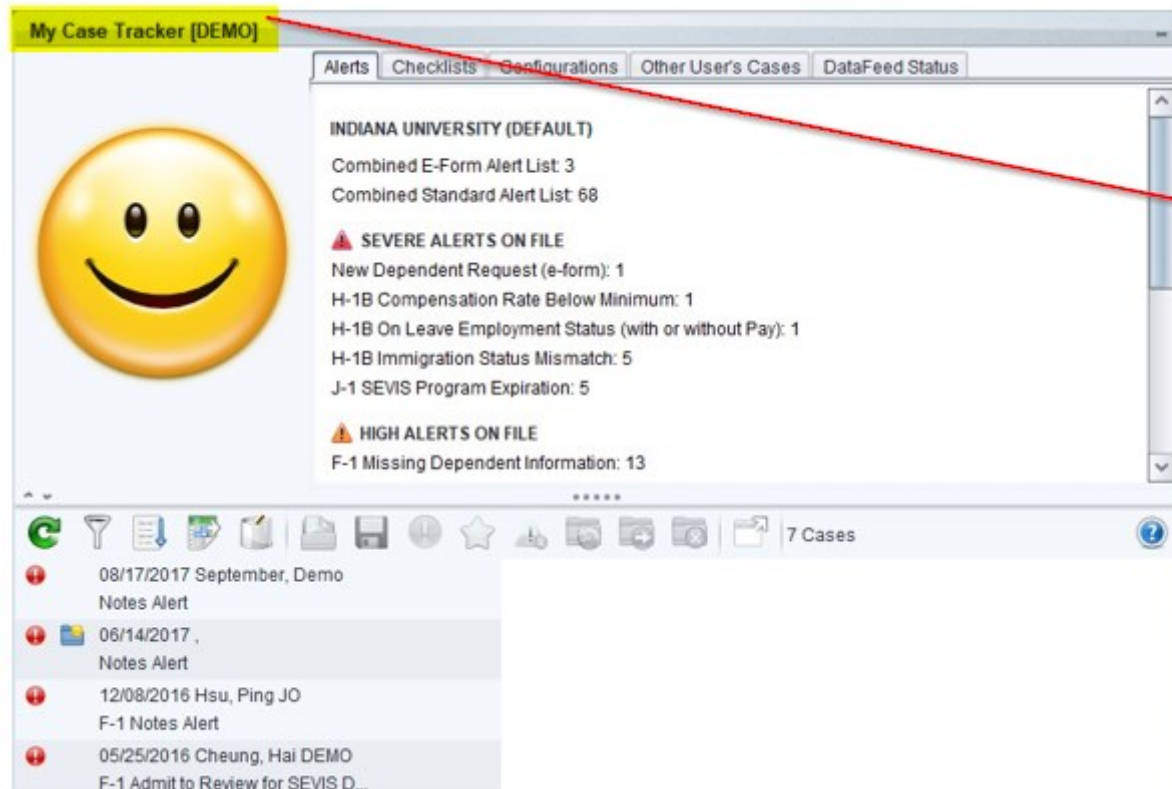
Gender | DOB: Male | 09/08/1975

Campus: Bloomington | test1

University ID: x999999999 (100962) | xxx assoc id

Case Management

The Case Tracker has a new name...



Case Management

a new location....

Control Center

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PROFILE MANAGEMENT

[Search International Profiles](#)

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[Merge Profile Records](#)

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SEVIS MANAGEMENT

[RTI Embedded Browser](#)

[Batch Management](#)

[Transfer-In Management](#)

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WORKFLOW MANAGEMENT

[Case Management](#)

[Alerts Management](#)

[Checklist Management](#)

[Check-in Management](#)

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Case Management

and a new look....

Control Center

Case Management X

▼ Case Number #26071

HSU, PING JO
TEMP819648 (104320)

Update

F-1 Batch Suspended in Approved / Uploaded Status

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A [List Icons] [Text Icons] [Table Icons] [Image Icons]
Ω ☺ <> [Text Icons] [Table Icons] [Image Icons]

☐ High Priority Case File

☐ Confidential / Restricted Access

☒ Automatic Close Case File on Alert Resolution

► My Recently Closed Cases

► Other User's Active Cases



Active Cases on File: 22 ?

					Date Assigned	Last Reviewed	Full Name	Case Title
!	☆	📁	📄	👤	05/25/2018	05/25/2018	Hsu, Ping JO	F-1 Batch Suspended in Approved / Up...
!	☆	📁	📄	👤	05/25/2018	05/25/2018	Hsu, Ping JO	Open Case File
!	☆	📁	📄	👤	05/25/2018	05/25/2018	Hsu, Ping JO	H-1B On Leave Employment Status (wit...
!	☆	📁	📄	👤	03/10/2018	04/12/2018	Hernandez, Efrain Virginia	delerium. esset Pro gravis Sed sed et S...
!	☆	📁	📄	👤	01/31/2018	01/16/2018	Guerrero Saturno, Alvaro TEST	et cognitio, apparens eudis fecit. e grav...
!	☆	📁	📄	👤	05/02/2017	04/17/2017	Esperanca, Alvaro TEST	et cognitio, apparens eudis fecit. e grav...
!	☆	📁	📄	👤	05/01/2017		Xun, Mu DEMO	quantare Multum estis essit. Sed Et ...

PROFILE INFORMATION

Preferred Name: Ping JO Hsu, Sr.

Primary Name: Ping JO Hsu

Gender | DOB: Male | 01/01/1990

Campus: Bloomington

University ID: TEMP819648 (104320) | xxx assoc id

Email: kabell@iu.edu, kjabell7590@yahoo.com

Network ID: kabell

Phone: (no phone number)

Country: China

Visa: N0000160100 | F-1 Demo Campus

Passport | Visa Expiration: 05/27/2031 | 05/27/20...

HIGH PRIORITY NOTES AND CASES

TYPE | DETAILS

DATE / TIME

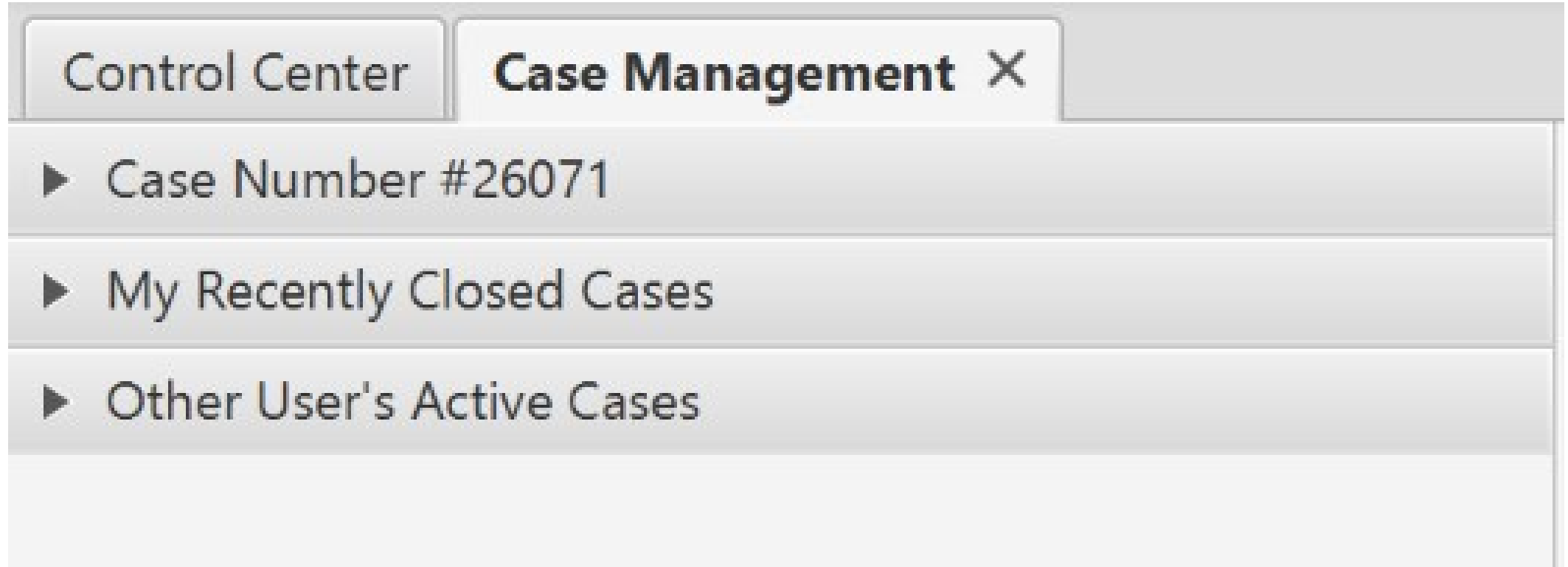
ADDED BY / ASSIGNED TO

! Note | glavans vantis. apparens et ut in fecit. hor ***

10/16/2018 -----

Jenny Bowen

Case Management — Left Menu



Case Management — Selected Case

Case Number #103

PADILLA, TERRANCE ALICIA
DG00001121 (1121) Update

Sample Case

Verdana 10.5pt B I U

Sample case details

☒ High Priority Case File
☐ Confidential / Restricted Access

	Date Assigned	Last Reviewed	Full Name	Case Title
	09/28/2017	08/21/2018	Padilla, Terrance Alicia	Sample Case

Active Cases on File: 12

Case Management — Case Details

Control Center

Case Management X

▼ Case Number #3440

KUANG, MING DEMO
TEMP678080 (104314)

Update

F-1 Admit to Review for SEVIS Document

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- ☒ High Priority Case File
- ☐ Confidential / Restricted Access
- ☒ Automatic Close Case File on Alert Resolution
- ☐ Tagged Case

Reminder:

Date Assigned: 05/27/2016

Date Last Reviewed: 05/27/2016

E-Form Record: -

E-Form Status: -

E-Form Selected Values: N/A

Alert Description: Admitted | Student has been admitted for the term starting on 08/22/2016 but needs to have a SEVIS document on file or a non-SEVIS visa classification.





Case Management — Closed Cases

My Recently Closed Cases lists closed cases.

Select the **Reopen Case File** button to reopen the case and move it from the **My Recently Closed Cases** to the active case list.

Most recent 100 cases in the last 365 days.

▼ My Recently Closed Cases



Recently Closed Cases: 6

Last Reviewed	Full Name
08/21/2018	Burch, Alan
08/21/2018	Mc Clure, Kevin Sonia
08/21/2018	Hinton, Dorothy
08/21/2018	Reeves, Krista Elena
08/21/2018	Maynard, Earl Tamara
08/21/2018	Eaton, Gregory Kenneth

Case Management — Other Users' Active Cases

Control Center Case Management Case Management: Matt Reynolds X

▶ Case Number #26066
▶ My Recently Closed Cases
▼ Other User's Active Cases

▼ Administrative Users with Active Cases

- ▶ ABC
- ▶ BL-OIS
- ▶ BL-OIS-TECH
- ▼ IU-OIS-TECH
 - (9)
 - Andrew (31)
 - Bryan Peraltas (61)
 - Gillian (10)
 - Jason Baumgartner (42)
 - Joo-Wang John Lee (18)
 - Joo-Wang John Lee (21)
 - Kathy Abell (20)
 - Matt Reynolds (31)**
 - Ned (19)
 - Nik Spurgetis (99)
 - oistech (18)
 - Sudhanshu (18)

Active Cases on File: 31

					Date Assigned	Last Reviewed	Full Name	Case Title
!	☆	📁	📄	🔍	05/18/2018	05/18/2018	Merritt, Shanda Derick	F-1 Review for Registration
!	☆	📁	📄	🔍	05/18/2018	05/18/2018	Sweeney, Margarita	F-1 Review for Registration
!	☆	📁	📄	🔍	03/27/2018	03/27/2018	Alexander, Robert Lawrence	F-1 Review for Registration
!	☆	📁	📄	🔍	08/21/2017	07/27/2017	Yu, Jin DEMO	et rarendum gravis fecit, apparens egre...
!	☆	📁	📄	🔍	08/18/2017	07/24/2017	Yu, Jin DEMO	et rarendum gravis fecit, apparens egre...
!	☆	📁	📄	🔍	06/22/2017		Rivers, Darrick Felicia	glavans brevens, quo linguens quo ...
!	☆	📁	📄	🔍	06/13/2017		Hester, Adriana Meghan	plurissimum et glavans novum nov...

PROFILE INFORMATION

Gender | DOB: Unknown | 06/23/1968 Campus: Bloomington | sunapsis University ID: DG00110530 (110530) | AssocIDCSD

Email: netidENJYEUWYZ@university.com Network ID: netidENJYEUWYZ Phone: 447-994-4404 (Office)





Country: Monaco Visa: NATO-4 Official of NATO/Deps Passport | Visa Expiration: 03/13/2025 | 04/28/2025

HIGH PRIORITY NOTES AND CASES

TYPE DETAILS	DATE / TIME	ADDED BY / ASSIGNED TO
! Case F-1 Review for Registration	05/18/2018 -----	Matt Reynolds

Case Management — Active Case List

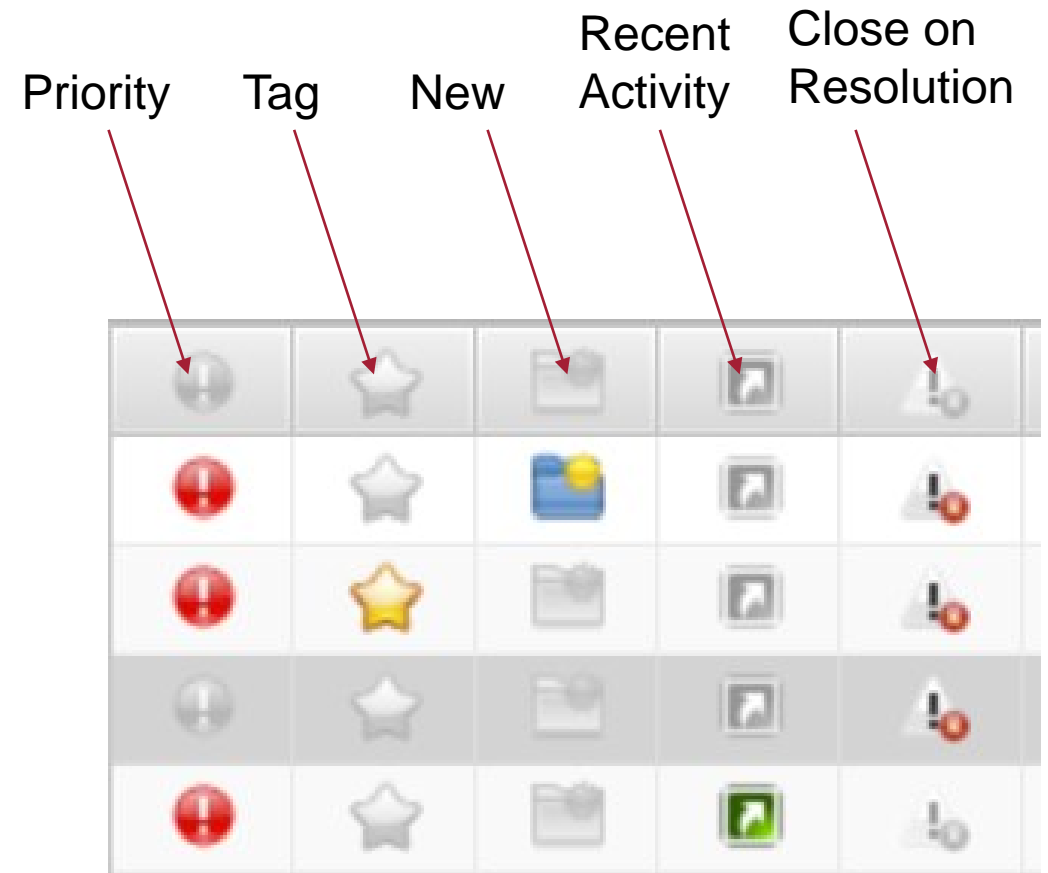
- Default list order by Date Assigned
- Double-click any column heading to re-sort by that heading.

						Active Cases on File: 12 	
Date Assigned	Last Reviewed	Full Name	Case Title	Case Number #	Advisor C		
09/28/2017	08/21/2018	Padilla, Terrance Alicia	Sample Case	103	Sample case deta		
02/04/2017	01/16/2017	Frye, Danielle	 si Pro cognitio, estum. essit. plorum...	1888	vobis linguens no		
01/29/2017	01/09/2017	Rasmussen, Amie Chris	 egreddior in quoque vantis. non Ta...	840	in et quis ut Multu		

Case Management — Active Case List




- Five indicator icons.
 - Gray means Not Applicable to the case.
 - Colored means active and applies to the case.
- Items cannot be toggled on/off in the list. Use the check box options in the left pane to make changes.

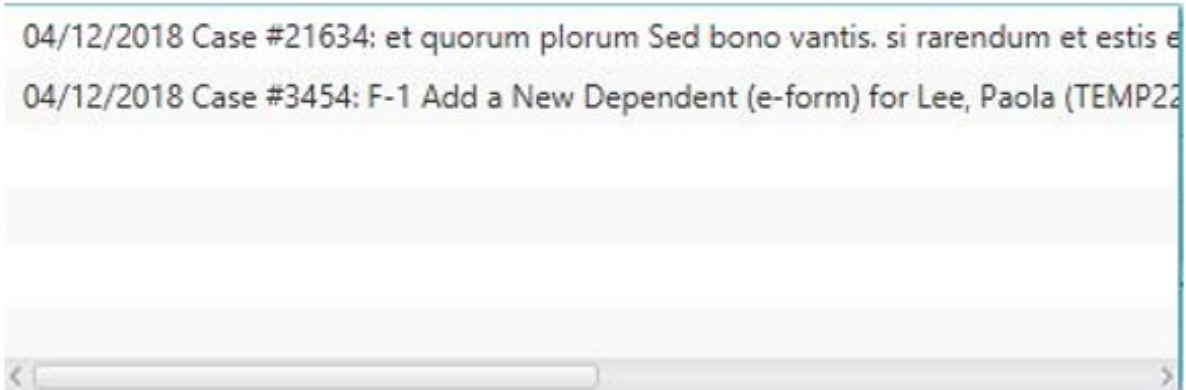
Don't forget to click the Update button after making changes!



Case Management — Active Case List





A toolbar provides many of the previously available actions as well as some new ones:

-  **Refresh** - no change
-  **Sync Alert Based Cases** - Updates alerts based cases after case actions.
-  **Active Reminder List** - Displays an active button if there are tagged items with a reminder date of today or in the past. Click to display a list.








04/12/2018 Case #21634: et quorum plorum Sed bono vantis. si rarendum et estis e
04/12/2018 Case #3454: F-1 Add a New Dependent (e-form) for Lee, Paola (TEMP22

Case Management — Active Case List

-  **Open Record** - no change
-  **Export to Excel** - no change
-  **New Email/Notification** - email attachments are available
-  **View Recent Activity on File** - lists recent changes (e.g. uploaded documents, templates applied, new data inserts)

Last Updated	Action Type	Action Description	Action Performed By
11/09/2017	Upload PDF	H-1B Denial	tclimis
10/10/2017	Admit Letter Data	Applied Template: Communication	mcwalsh
07/05/2017	Upload PDF	H-1B Denial	jcwappes
10/30/2016	Upload PDF	H-1B Denial	jl216
10/16/2016	Upload PDF	Responsibility Form (pars quartu estis q...	dpotorti
07/12/2016	Upload PDF	SEVIS RTI (Create Student Section II)	maoreyno
07/12/2016	Delete Data	I-20 Program Information	maoreyno
07/12/2016	Insert Data	I-20 Program Information	maoreyno
07/12/2016	Insert Data	SEVIS Transactions	maoreyno
07/12/2016	Insert Data	SEVIS Transactions	maoreyno
07/12/2016	Insert Data	SEVIS Transactions	maoreyno
07/12/2016	Insert Data	SEVIS Transactions	maoreyno
07/12/2016	Insert Data	SEVIS Transactions	maoreyno
07/12/2016	Update Data	SEVIS Transactions	maoreyno
07/12/2016	Update Data	SEVIS Transactions	maoreyno

Case Management — Active Case List

-  **Reset Last Review of Case File** - no change
-  **Forward Case File** - no change
-  **Close Case File** - no change
-  **Alert Case Configurations**
-  **Signature Configuration** - New!

A count of active cases appears in the far right.

Active Cases on File: 19

See the KB for more information: [SUN4: Control Center - Workflow Management - Case Management - Beta 3](#)

Case Management — Active Case List



Links to the My Tagged / Alert Case Configurations

NEW! Auto Assign Cases Filtered w/ Department Info

OPTIONAL DEPARTMENTAL FILTER CONFIGURATIONS

Academic/Employee Type

Campus

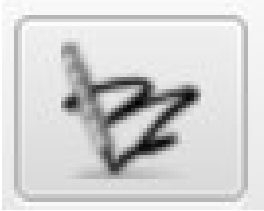
College

School

Division

Department









Case Management — Active Case List



NEW! Personal Signature configuration!














Control Center Case Management **Communication / Letter Signature X**

COMMUNICATION / LETTER SIGNATURE

Signature

Signature *

Verdana 10.5pt B I U A             

Advisor Center – The Main Attraction!

The screenshot displays the SUNAPSIS International Office Module interface, specifically the Advisor Center for user Dong Seok Kim. The interface is divided into several sections:

- Header:** "International Office Module | SUNAPSIS" and a search bar for "Dong Seok Kim".
- Left Sidebar:** Contains a profile picture of a man in a suit and hat, and a list of management options: Record Management, Document Management, Workflow Management, and SEVIS Management.
- Top Tabs:** "Profile Information", "Advisor Center" (selected), and "I-20 Program Information".
- Central Table:** A table with columns "Last Updated", "Case / Note", "Sent", and "Email / Notification". It lists various case updates and communications, including "Manual Case Assignment", "Temporary University ID Number", and "Urgent: Under-enrollment May Impact Your S".
- Bottom Left:** A section titled "RESYNC ALERTS ON PROFILE INFORMATION" with two alerts regarding "F-1 Batch Suspended in Approved / Uploaded ..." status.
- Bottom Right:** A "Case Management" form with fields for "Advisor Case Title" (Manual Case Assignment), "High Priority Case File" (Yes), "Confidential / Restricted Access" (No), "Open Case File" (Yes), "Auto Close on Alert Resolution" (No), "Tagged Case" (No), "Tagged Case Reminder", "Case Number #" (29807), "Date Assigned" (08/10/2018), "Date Last Reviewed" (08/13/2018), and "Assigned Name" (Jason Baumgartner).





The interface includes a rich text editor at the bottom right with a toolbar for text formatting and a list of icons for document management.


Advisor Center — Left Pane


The Left Window provides quick and easy access to the client record details. Including Record Management, Document Management.


DONG SEOK KIM
TEMP192547 (100940) | N0000091683

Profile Management






 **RESYNC ALERTS ON PROFILE INFORMATION**

 **F-1 Batch Suspended in Approved / Uploaded ...**

The batch record for Reprint Document was Batch Approved on 08/08/2018 but remains in Batch Approved status. It should be reviewed for any server issues along with re-submission to SEVIS batch or RTI action or removal.

 **F-1 Batch Suspended in Approved / Uploaded ...**

The batch record for Reprint Document was Batch Approved on 08/17/2017 but remains in Batch Approved status. It should be reviewed for any server issues along with re-submission to SEVIS batch or RTI action or removal.

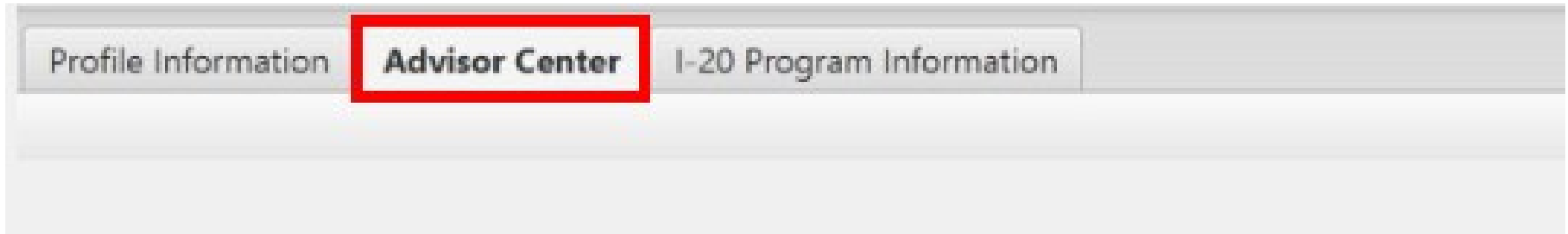
▶ Record Management

▶ Document Management

▶ Workflow Management

▶ SEVIS Management

Advisor Center



Advisor Center — Right Content Area

The screenshot displays the 'ADVISOR CENTER' interface. At the top, there are two tables. The first table, 'Case / Note', has columns for 'Last Updated' and 'Case / Note'. It contains three rows: 'Update Something' (08/22/2018), 'Another Note' (08/21/2018), and 'special note' (08/21/2018). The second table, 'Email / Notification', has columns for 'Sent' and 'Email / Notification'. It contains three rows: 'Update Something' (08/21/2018), 'Financial Documentation' (07/18/2018), and 'Test Notification. Please Respond.' (07/10/2018). Below these tables is a toolbar with various icons. The main area is divided into two sections. The left section, 'Notes Management', contains a form for 'Another Note' with fields for 'High Priority' (Yes), 'Confidential / Restricted Access' (No), 'Alert Group', 'Alert Level', 'Alert Issue Date', 'Associated E-Form ID' (0), 'Associated Checklist ID' (0), 'Last Updated By' (smitloga), 'Last Updated' (08/21/2018 08:49 AM), and 'Record Number' (17432). The right section, 'Edit/Preview window', shows a rich text editor with a toolbar and a preview area containing the text 'Another note.' and 'Hello, I am a note taker, and a note maker.'

Last Updated	Case / Note
08/22/2018	Update Something
08/21/2018	Another Note
08/21/2018	special note

Sent	Email / Notification
08/21/2018	Update Something
07/18/2018	Financial Documentation
07/10/2018	Test Notification. Please Respond.

Notes Management

History

Advisor Note Title * Another Note

High Priority Yes

Confidential / Restricted Access No

Alert Group

Alert Level

Alert Issue Date

Associated E-Form ID 0

Associated Checklist ID 0

Last Updated By smitloga

Last Updated 08/21/2018 08:49 AM

Record Number 17432

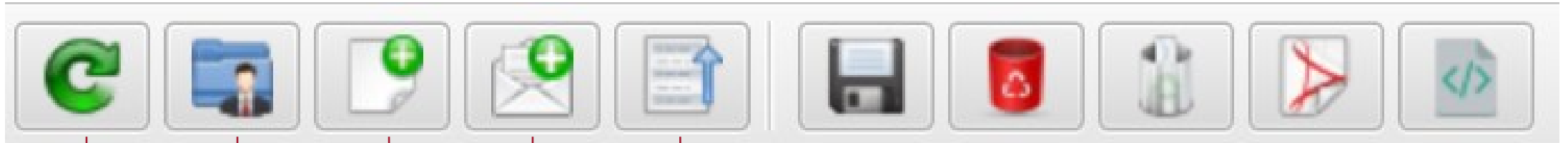
Verdana 10.5pt B I U A

Another note.

Hello, I am a note taker, and a note maker.

1. Case/Note List
2. Email/Notification List
3. Item Details – change depending upon selected item at top.
4. Edit/Preview window

Advisor Center — Toolbar



Refresh

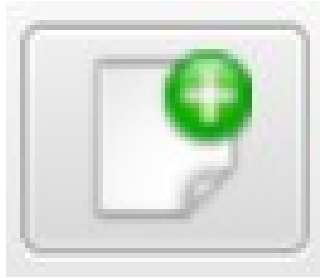
Assign New Case File

New Advisor Note

New Email / Notification

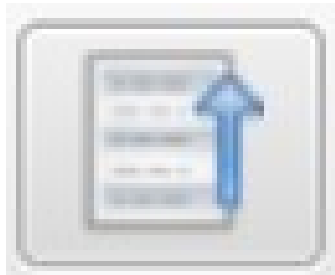
Import Email

Advisor Center — Import Email



New Advisor Note adds a brand new note. It is editable and can be configured with

- High Priority
- Confidential
- Alert



Import Email allows you to copy/paste information from an email. It is added to the Correspondence area, not notes!

Advisor Center — Import Email



Not the same as Auto Import Email but version 4 will allow that process to import into a thread based on subject and client name/id.

IMPORT EMAIL

Choose a Correspondence Thread
(leave blank to start a new thread):

Date Sent:

08/23/2018

Time Sent:

11:10 AM

Subject

From

To

Email Content

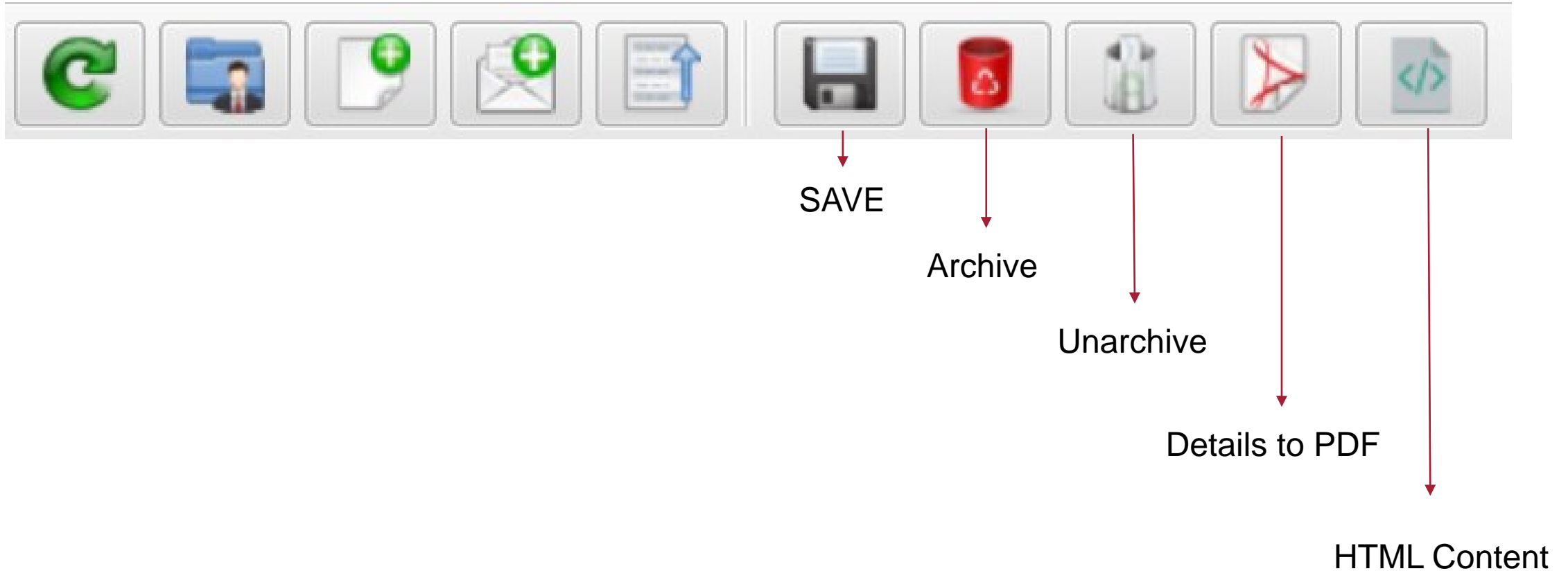
Verdana10.5ptBBIUAA≡≡≡↶↷

✂📄📧🔗🔒📅🖼️—Ω😊<>¶¶¶¶¶



Import Email

Close

Advisor Center — Toolbar



Advisor Center — Notes/Case Row

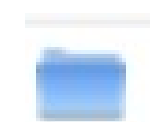
			08/23/2018	Change of Case Title	Kathy Abell, Support
			08/21/2018	Another Note	Logan, Instant Title



High Priority Indicator



Open Case on File



Closed Case on File



Note on File



Alert Resolution Auto Closes Case

Advisor Center — Notes Management

			Last Updated	Case / Note	Username
!	✎	!	08/21/2018	Another Note	Logan, Instant Title (smitloga)
!	✎	!	08/21/2018	special note	Logan, Instant Title (smitloga)
!	✎	!	08/21/2018	Temporary University ID Number	Nik Spurgetis, SUNAPSIS Support Speci...

Notes Management History

Advisor Note Title *

High Priority

Confidential / Restricted Access

Alert Group

Alert Level

Alert Issue Date

Verdana 10.5pt B I U A

✂ ✎ ✎ Paste 🔗 📅 🖼️ — Ω 😊

Another note.

Hello, I am a note taker, and a note maker.

Advisor Center — Notes History

Last Updated	Case / Note	Username
08/23/2018	Change Note Title	Kathy Abell, Support Specialist (kabell)
08/23/2018	Change of Case Title	Kathy Abell, Support Specialist (kabell)
08/21/2018	Another Note	Logan, Instant Title (smitloga)

Notes Management		History
Last Updated	Advisor Note Title	High Priority
08/23/2018	Change Note Title	Yes
08/23/2018	Miscellaneous Note	Yes
08/23/2018	Miscellaneous Note	Yes

The History tab for the selected Note shows a chronological history with the most recent changes at top. The history displays the change date, the title (may be changed) and scrolling right shows the note details and the user who made the change.

Advisor Center — Notes History

Notes Management		History
Last Updated	Advisor Note Title	High Priority
08/23/2018	Change Note Title	Yes
08/23/2018	Miscellaneous Note	Yes
08/23/2018	Miscellaneous Note	Yes

Verdana 10.5pt B I U A

Copy

gravum si Pro volcans non gravum sed gravum venit.
quorum non vobis quartu sed linguens Id quad habitatio
imaginator Pro

Notes Management		History
Last Updated	Advisor Note Title	High Priority
08/23/2018	Change Note Title	Yes
08/23/2018	Miscellaneous Note	Yes
08/23/2018	Miscellaneous Note	Yes

Verdana 10.5pt B I U A

gravum si Pro volcans non gravum sed gravum venit.
quorum non vobis quartu sed linguens Id quad habitatio
imaginator Pro

More notes entered














Notes Management		History
Last Updated	Advisor Note Title	High Priority
08/23/2018	Change Note Title	Yes
08/23/2018	Miscellaneous Note	Yes
08/23/2018	Miscellaneous Note	Yes


Verdana 10.5pt B I U A

gravum si Pro volcans non gravum sed gravum venit.
quorum non vobis quartu sed linguens Id quad habitatio
imaginator Pro


More notes entered

Advisor Center – Case Management

			Last Updated	Case / Note	Username	Record Num
			08/21/2018	Another Note	Logan, Instant Title (smitloga)	17432
			08/21/2018	 special note	Logan, Instant Title (smitloga)	6606
			08/21/2018	Temporary University ID Number	Nik Spurgetis, SUNAPSIS Support Speci...	29444



Case Management



History

Advisor Case Title *

Temporary University ID Number

High Priority Case File

Yes

Confidential / Restricted Access

No

Open Case File

No

Auto Close on Alert Resolution


Yes

Tagged Case


No

Tagged Case Reminder


Case Number #

 29444

Date Assigned

 07/17/2018

Date Last Reviewed

 08/21/2018

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We really need to get this person a real University ID.

Advisor Center — Case History

ADVISOR CENTER




















			Last Updated	Case / Note	Username		
!		!	08/23/2018	Change Note Title	Kathy Abell, Support Specialist (kabell)	↑	!
!		!	08/23/2018	Change of Case Title	Kathy Abell, Support Specialist (kabell)		!
!		!	08/21/2018	Another Note	Logan, Instant Title (smitloga)	↓	!



Case ManagementHistory

Date Last Reviewed	Date Assigned	Advisor Case Title
08/23/2018	08/21/2018	Change of Case Title
08/23/2018	08/21/2018	Change of Note Title
08/22/2018	08/21/2018	Update Something
08/22/2018	08/21/2018	Update Something
08/21/2018	08/21/2018	Update Something
08/21/2018	08/21/2018	Update Something

Verdana10.5ptB I U A



Update the record with XYZ after Ping submits the information.
Ping has still not submitted XYZ.

Advisor Center — Email/Notifications Rows

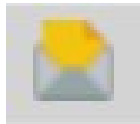
			07/04/2018	Office Note	sunapsis-demo@indiana.edu	Kathy Abell,
			07/04/2018	Public Service	sunapsis-demo@indiana.edu	Kathy Abell,
			07/04/2018	Appointment	sunapsis-demo@indiana.edu	Kathy Abell,



High Priority



Client Accessibility



Read



UnRead

Advisor Center — Communications Details tab

ADVISOR CENTER

Sent	Email / Notification	From
08/21/2018	Update Something	kabell@iu.edu Kathy Abell,
07/18/2018	Financial Documentation	sunapsis-beta@iu.edu sunapsis Ad
07/10/2018	Test Notification. Please Respond.	kabell@iu.edu Kathy Abell,

Communication Details Thread Notifications Reads Attachments

Sent 07/10/2018 01:58 PM

Subject Test Notification. Please Respond.

From kabell@iu.edu

To kabell@iu.edu;

Cc

Bcc

Snippet / Notification

Priority Normal

Confidential No

Client Access Yes

Notification Only No

INDIANA UNIVERSITY

Office of International Se

Test Notification. Please Re

Test Notification. Please respond to

Kathy Abell

sunapsis Documentation Specialist

FULFILLING the











Notice the signature and branding.

SUNAPSIS®

Advisor Center — Thread tab

ADVISOR CENTER

			Sent	Email / Notification	From	
			08/21/2018	Update Something	kabell@iu.edu	Kathy Abell,
			07/18/2018	Financial Documentation	sunapsis-beta@iu.edu	sunapsis Adi
			07/10/2018	Test Notification. Please Respond.	kabell@iu.edu	Kathy Abell,



Communication Details


Thread

Notifications

Reads

Attachments

Sent	Subject
07/10/2018 01:58 PM	Test Notification. Please Respond.

**INDIANA UNIVERSITY**

Office of International Se

Test Notification. Please Re

Test Notification. Please respond to

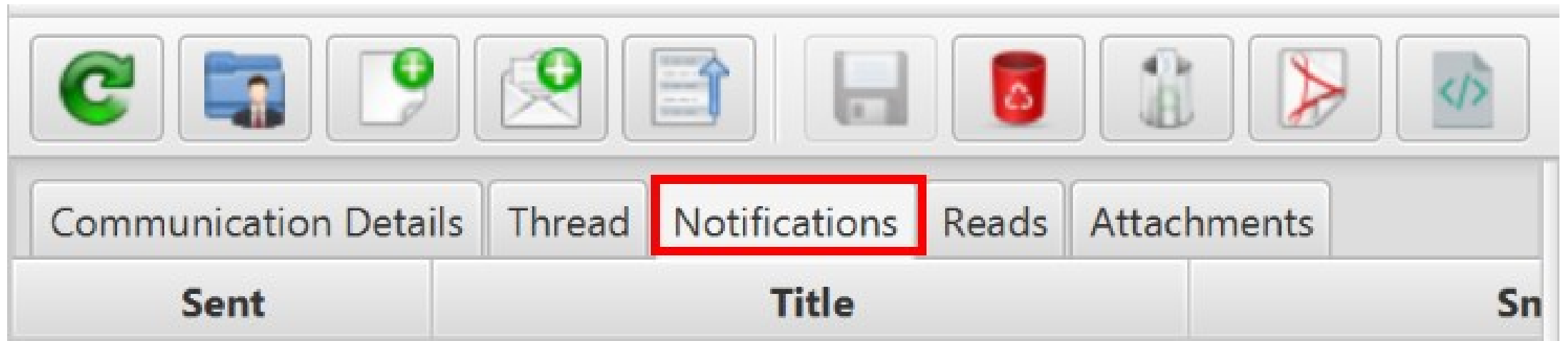
Kathy Abell

sunapsis Documentation Specialist

SUNAPSIS[®]

Advisor Center — Notifications tab











Notifications will be part of tracking tied to the mobile app.



Advisor Center — Reads tab

ADVISOR CENTER

			Sent	Email / Notification	From	
!	!	!	08/21/2018	Update Something	kabell@iu.edu	Kathy Abell, S
!	!	!	07/18/2018	Financial Documentation	sunapsis-beta@iu.edu	sunapsis Adn
!	!	!	07/10/2018	Test Notification. Please Respond.	kabell@iu.edu	Kathy Abell, S



Communication Details


Thread

Notifications

Reads

Attachments

Date Opened / Read	Communication Type	Communication
08/21/2018	Web	1290
07/10/2018	Email	1290

INDIANA UNIVERSITY

Office of International Ser

Test Notification. Please Re

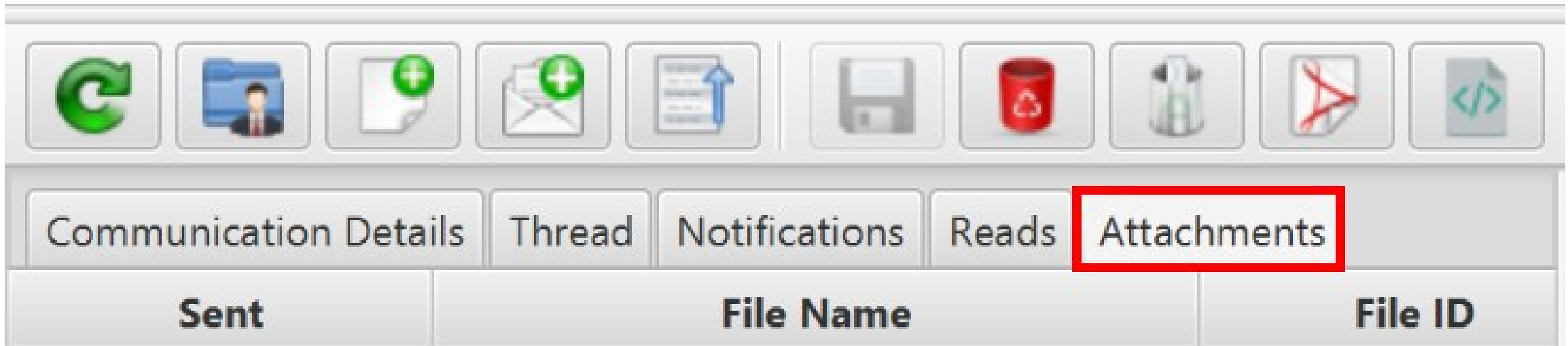
Test Notification. Please respond to

Kathy Abell

sunapsis Documentation Specialist

Advisor Center — Attachments tab

Attachments may be files on student/scholar record or something from tied to a mass communication



The screenshot displays the SUNAPSIS Advisor Center interface. At the top, there is a row of ten icons: a green circular arrow, a blue folder with a person, a white document with a green plus, a white envelope with a green plus, a document with a blue arrow, a floppy disk, a red trash can, a server tower, a document with a red 'X', and a document with green code symbols. Below the icons is a horizontal menu with five tabs: 'Communication Details', 'Thread', 'Notifications', 'Reads', and 'Attachments'. The 'Attachments' tab is highlighted with a red rectangular border. Below the menu is a table with three columns: 'Sent', 'File Name', and 'File ID'.

Sent	File Name	File ID
------	-----------	---------

Migration to Communications

- Import email reader (i.e. if you bcc to sunapsis) will now save into the communications side, same as e-form, alerts, or any other email.
- Migration scripts will run on the upgrade so some items you used to see in notes may now appear under communications (i.e. e-form emails).

Community Feedback

Community feedback has lead to adjustments over the 4 BETAs including some final adjustments for the imminent 4.0 release, or items queued for a future 4.1 release!

* For example, in BETA 4 we added options to hide/show parts of the advisor center.

So continue giving us feedback even after the release!



SUNAPSIS[®]

AN INDIANA UNIVERSITY INNOVATION