



# SEVIS Transfer-In Management In sunapsis 4

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# Agenda Items

- Transfer-In Process in sunapsis 3
  - How it works now
  - Pitfalls
- New Process for sunapsis 4
  - New tools
  - More transparency
  - Easier Process

# The sunapsis 3 Way of Transfer-In Management

- Use an e-form, either as one off e-form or as part of an e-form group for initial document production:
  - Collect information, including SEVIS number
  - Route to DSO/ARO from current school for more info
- Run RTI table extract to Excel of transfer-in list, and then manually compare with admits and/or e-forms.
- Still easy to miss, sometimes creating initial I-20/DS-2019 docs, that are at least uncovered through orientation document check.

# Transfer-In in Checklist Workflow

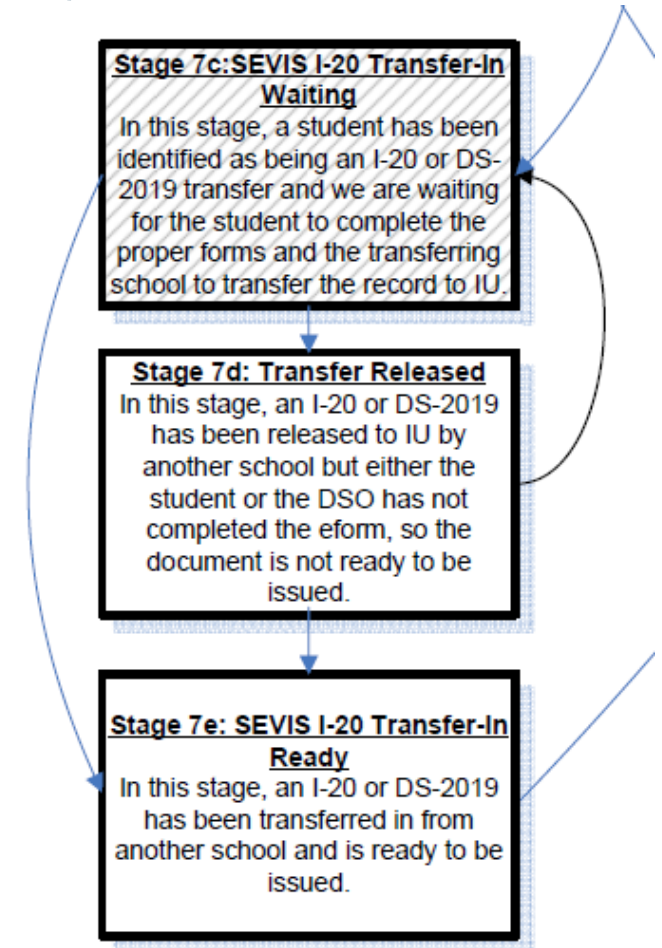
Starting in version 3.0 the checklist workflow enabled us to have stages and tasks on top of the e-forms themselves:

- New task extension of Transfer Release Status.
- New RTI extraction that would update those tasks with this extension by looking at the dates in RTI and if released and if the SEVIS number is on file (under associated ID numbers) then update that task.
- Stages could be configured, including stage movement rules, so you can track both completion of the e-form and the release from RTI, and setup automated emails.

# Transfer-In in Checklist Workflow

(version 3.0/3.1 approach)

- SEVIS Transfer-In Waiting stage to hold onto students that at least started the transfer-in e-form and wait until they are released in RTI.
- SEVIS Transfer-In Released auto movement rule for when the task extension updates saying released but halts in stage if DSO didn't do the 2<sup>nd</sup> approver part of the e-form.
- SEVIS Transfer-In Ready so that the staff know to actually work on that record.



# Transfer-In in Checklist Workflow

(version 3.0/3.1 approach)

Greatly improved the process but still had limitations:

- Required use of checklist workflow, which not all clients planned to use for transfer-in processing.
- Extraction from RTI transfer-in list ongoing updated in the moment of the extraction, so you couldn't extract first and connect to a record later.
- Difficult to review who may need to submit the e-form, which has an auto template to load SEVIS number to associated ID numbers, or difficult to view what should be released soon by those connected records.



# Late 3.0 Tools for Managing Transfer-In

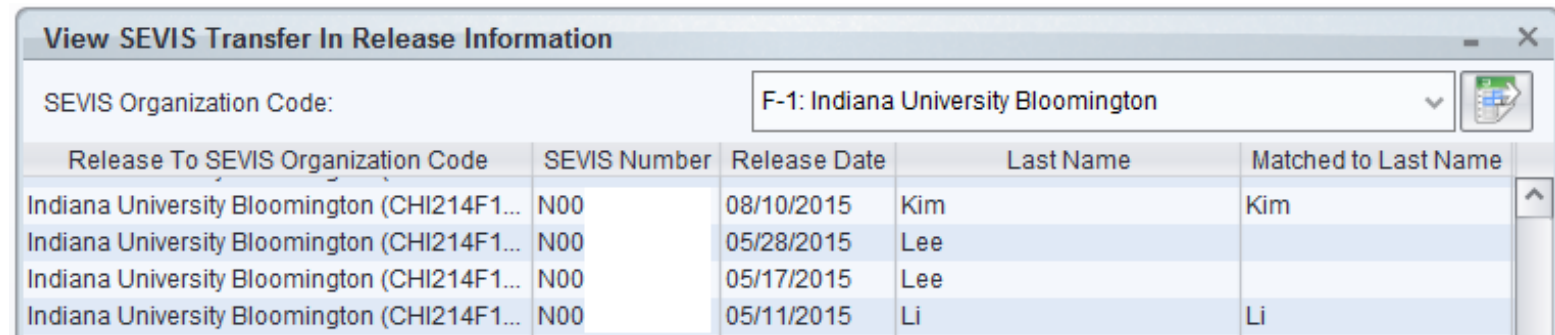
Upgraded the RTI extraction to load into a table:

- Data retained throughout the process. Enables comparison of what is on the RTI list vs. the information we have collected via e-form to associate the records together.
- Management view of the compared data, which doesn't have to be tied to a checklist workflow.
- Still could trigger the checklist task extension, but now doesn't need to be run all the time as saved table could trigger it.
- New alert (for non-checklist workflow processes) for F-1 Student / J-1 Student / J-1 Scholar SEVIS Transfer Release.

# SEVIS Transfer-In Release Information

(version 3.2 approach)

From the main menu go to *SEVIS Management -> View SEVIS Transfer In Release Information* and then select the appropriate SEVIS Organization Code in the drop down for the following display:



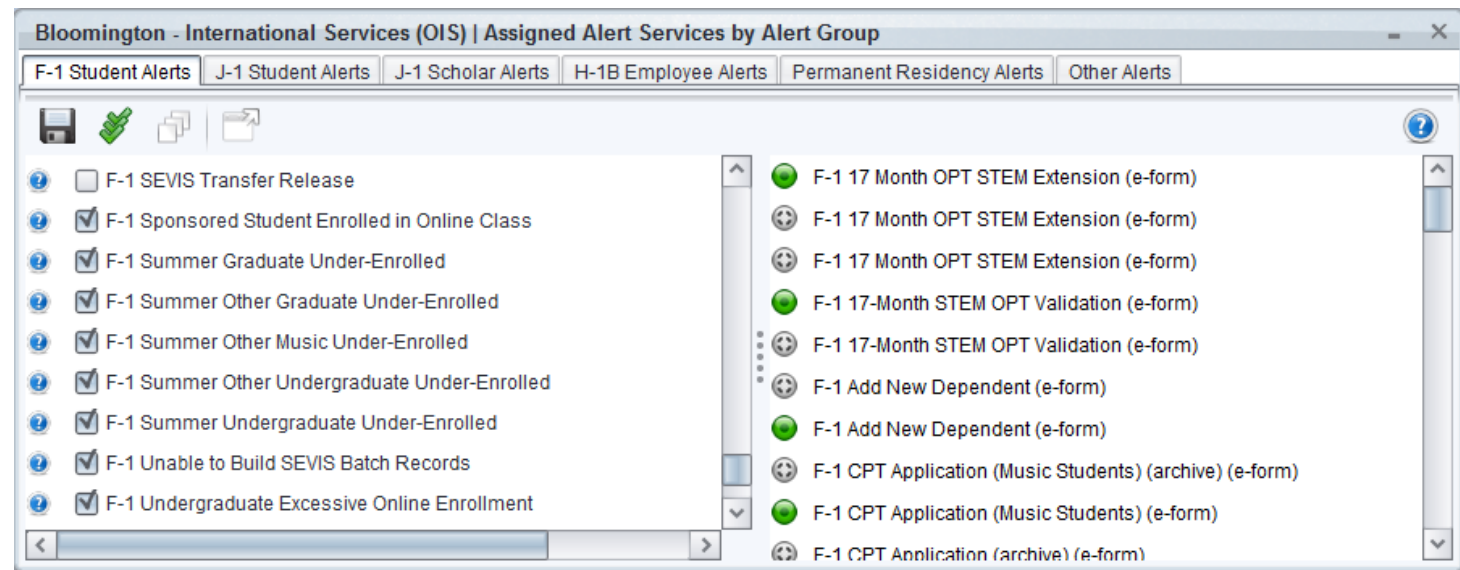
Release To SEVIS Organization Code	SEVIS Number	Release Date	Last Name	Matched to Last Name
Indiana University Bloomington (CHI214F1...	N00	08/10/2015	Kim	Kim
Indiana University Bloomington (CHI214F1...	N00	05/28/2015	Lee	
Indiana University Bloomington (CHI214F1...	N00	05/17/2015	Lee	
Indiana University Bloomington (CHI214F1...	N00	05/11/2015	Li	Li



# Alert for SEVIS Transfer Release

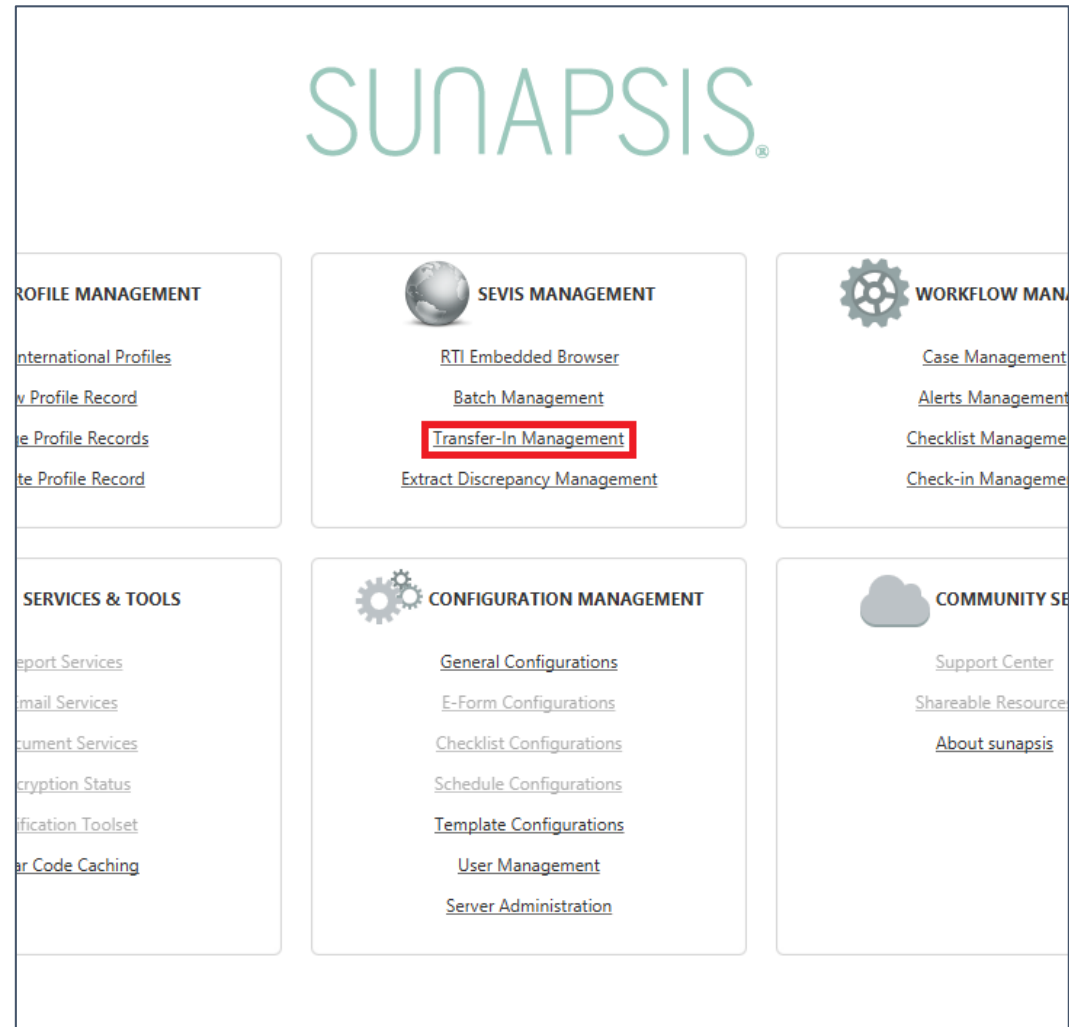
(version 3.2 approach)

If you utilize alerts to manage the process, including case assignments, instead of checklist workflow stages then you can consider turning on the following alert (example below is for the F-1 student):



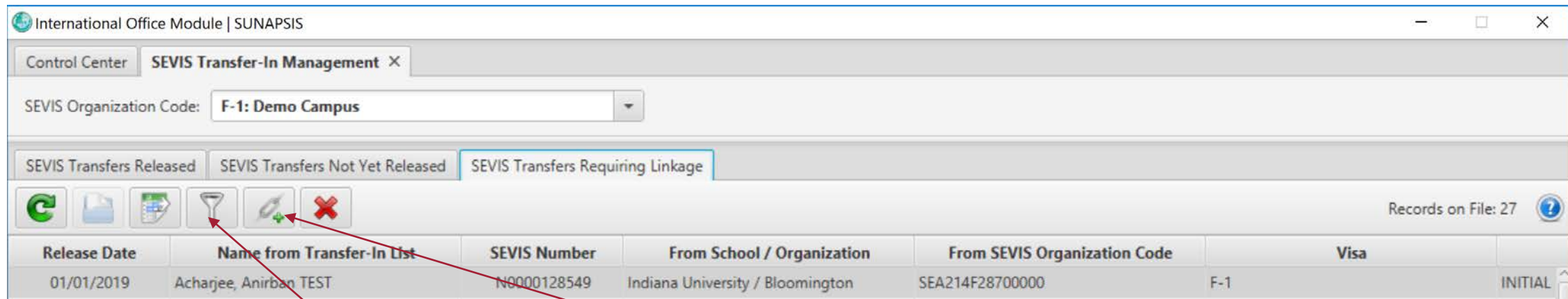
# sunapis 4 Transfer-In

Access Transfer-In from the Control Center



# Transfer-In Upon Arrival

## Link SEVIS Transfers to sunapsis Profiles



International Office Module | SUNAPSIS

Control Center SEVIS Transfer-In Management X

SEVIS Organization Code: F-1: Demo Campus

SEVIS Transfers Released SEVIS Transfers Not Yet Released SEVIS Transfers Requiring Linkage

Records on File: 27

Release Date	Name from Transfer-In List	SEVIS Number	From School / Organization	From SEVIS Organization Code	Visa	
01/01/2019	Acharjee, Anirban TEST	N0000128549	Indiana University / Bloomington	SEA214F28700000	F-1	INITIAL

Filter by release year with the funnel button, and use the link button to tie a transfer-in to their international profile.

This is useful for when something goes wrong with the profile association during the Eform and Transfer-In Extract processes.

# Transfer-In Select SEVIS Organization







International Office Module | SUNAPSIS

Control Center SEVIS Transfer-In Management X

SEVIS Organization Code:


J-1: Indiana University  
F-1: Demo Campus

SEVIS Transfers Released Linkage

Release Date	Name from Transfer-In List	SEVIS Number	From School / Orga
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# Transfer-In: Released

 International Office Module | SUNAPSIS

Control Center

SEVIS Transfer-In Management ×


SEVIS Organization Code: 


F-1: Demo Campus


SEVIS Transfers Released

SEVIS Transfers Not Yet Released

SEVIS Transfers Requiring Linkage










Release Date	Name from Transfer-In List	Do Names Match?	SEVIS Number	Matched to Univer...	From School / Organization	From SEVIS Organization Code
07/16/2018	Builder, Bob	Yes	N0000126548	TEMP111985	Indiana University IUPUI	SEA214F28700001
07/25/2018	Henson, Jim	Yes	N0000091227	TEMP178820	Indiana University IUPUI	SEA214F28700001
07/31/2018	Antonio, Dante	No	N0000091527	DG00110421	Indiana University IUPUI	SEA214F28700001

# Transfer-In: Not Yet Released

SEVIS Organization Code: **F-1: Demo Campus** ▼







SEVIS Transfers Released | **SEVIS Transfers Not Yet Released** | SEVIS Transfers Requiring Linkage

Release Date	Name from Transfer-In List	Do Names Match?	SEVIS Number	Matched to Univer...	From School / Organization	From SEVIS Organization Code
09/25/2018	Milton, Berle	No	N0000103958	TEMP115285	Rock Chalk University Rock Chalk Unive...	KAN214F36170000
09/10/2018	Curtis, Ian	Yes	N0000091668	TEMP280005	Indiana University IUPUI	SEA214F28700001



# Transfer-In: Requiring Linkage

SEVIS Organization Code: <b>F-1: Demo Campus</b>					
SEVIS Transfers Released SEVIS Transfers Not Yet Released <b>SEVIS Transfers Requiring Linkage</b>					
     					
Release Date	Name from Transfer-In List	SEVIS Number	From School / Organization	From SEVIS Organization Code	Visa
06/25/2018	Frew, Sean	N0000091229	Indiana University IUPUI	SEA214F28700001	F-1
06/28/2018	Kalakaua III, Nalani	N0000091339	Indiana University IUPUI	SEA214F28700001	F-1
06/28/2018	Duarte, Shad	N0000059370	Indiana University IUPUI	SEA214F28700001	F-1
06/29/2018	Brandybuck, Paladin C	N0000137842	Indiana University Bloomington	SEA214F28700000	F-1
07/14/2018	Patton, Michael	N0000092981	Indiana University IUPUI	SEA214F28700001	F-1
07/15/2018	Agarwal, Ananka	N0000134242	Indiana University Bloomington	SEA214F28700000	F-1
08/14/2018	Lawson, Lesley	N0000092203	Indiana University IUPUI	SEA214F28700001	F-1
08/25/2018	Rigby, Eleanor	N0000091710	Indiana University IUPUI	SEA214F28700001	F-1
09/08/2018	Snow, John	N0000092006	Indiana University IUPUI	SEA214F28700001	F-1
09/10/2018	Curtis, Ian	N0000091668	Indiana University IUPUI	SEA214F28700001	F-1
09/14/2018	Knight, Gladys	N0000091502	Indiana University IUPUI	SEA214F28700001	F-1
09/25/2018	Milton, Berle	N0000103958	Rock Chalk University Rock Chalk Unive...	KAN214F36170000	F-1

# Transfer-In

Buttons!!

Control Center


SEVIS Transfer-In Management X


SEVIS Organization Code: F-1: Demo Campus


SEVIS Transfers Released


SEVIS Transfers Not Yet Released


SEVIS Transfers Requiring Linkage




















Release Date	Name from Transfer-In List	SEVIS Number	From School / Organization
06/25/2018	Frew, Sean	N0000091229	Indiana University IUPUI
06/28/2018	Kalakaua III, Nalani	N0000091339	Indiana University IUPUI
06/28/2018	Duarte, Shad	N0000059370	Indiana University IUPUI
06/29/2018	Brandybuck, Paladin C	N0000137842	Indiana University Bloomington
07/14/2018	Patton, Michael	N0000092981	Indiana University IUPUI

# Transfer-In: Associate to Record

Use the chain link icon with the little green plus symbol.

Control Center		SEVIS Transfer-In Management X	
SEVIS Organization Code:		F-1: Demo Campus	
SEVIS Transfers Released		SEVIS Transfers Not Yet Released	SEVIS Transfers Requiring Linkage
			
			
Release Date	Name from Transfer-In List	SEVIS Number	From School / Organization
06/25/2018	Frew, Sean	N0000091229	Indiana University IUPUI
06/28/2018	Kalakaua III, Nalani	N0000091339	Indiana University IUPUI
06/28/2018	Duarte, Shad	N0000059370	Indiana University IUPUI
06/29/2018	Brandybuck, Paladin C	N0000137842	Indiana University Bloomington
07/14/2018	Patton, Michael	N0000092981	Indiana University IUPUI

# Transfer-In: Associate to Record

## Adding the University ID

**Click out of the UID field to allow the other fields to auto populate**

**FIND INDIVIDUAL RECORD TO ASSOCIATE TRANSFER-IN**

**LOOKUP INDIVIDUAL RECORD**

Record Linked to University ID

Client's Name

Client's Date of Birth

Client's SEVIS Number

[Associate Transfer-In to Individual Record](#) [Close](#)

**FIND INDIVIDUAL RECORD TO ASSOCIATE TRANSFER-IN**

**LOOKUP INDIVIDUAL RECORD**

Record Linked to University ID

Client's Name

Client's Date of Birth

Client's SEVIS Number

[Associate Transfer-In to Individual Record](#) [Close](#)



# Transfer-In: Associate to Record

**PALADIN TEST BRANDYBUCK**  
TEMP477881 (98825) | N0000137842

► Profile Management

▼ Record Management

Records & Views    Apply Template to Records

► Biographical Information

▼ I-20 Detail Information

I-20 Program Information

I-20 Financial Information

I-20 Other Information

Authorized Underenrollment

Curricular Practical Training

Optional Practical Training Authorizations

Optional Practical Training Employers

Optional Practical Training Unassociated Employers

I-983 Training Plan for STEM OPT Students

Off-Campus Employment








**SEVIS Transfer In**

SEVIS Transfer Out



► DS-2019 Detail Information

► SEVIS Batch Queue / Log Information

**SEVIS TRANSFER IN** [x]

N0000137842  
Release Date: 06/29/2018

Release To SEVIS Organization Code	Demo Campus
SEVIS Number *	N0000137842
Release Date *	06/29/2018
Visa	F-1
Last Name	Brandybuck
First Name	Paladin C
From School / Organization	Indiana University Bloomington
From SEVIS Organization Code	SEA214F28700000
Request / Category	APPROVED
Student Status	DRAFT
Last Updated	 05/23/2016 09:51 AM
Record Number	 2

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# Q&A







**Thank You!**

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