

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

Pre-Matriculation Communication		SOP #: SA.013.02
Effective Date	02.01.2018	
Last Revision/Review	05.09.2023	

1. Purpose

To outline and define the processes by which newly accepted students receive communication from the Office of Student Affairs prior to matriculation.

2. Related Policy/Authority

Include a link to the organization's authority (its policy and/or federal citation).

3. Faculty/Staff Responsibilities

Assistant Vice President of Student Affairs, Associate Director of Student Affairs.

4. Definitions/Abbreviations

5. Procedural Steps

1.1 The Office of Student Affairs receives notification of an applicant's status as an "accepted" student, in any of the following three ways:

- a. Burrell Finance: The Burrell Finance Office notifies the Office of Student Affairs when they receive a deposit from an applicant.
- b. Burrell Admissions Office: The Burrell Admissions Office regularly distributes an "Admissions Master List" of the applicants who have been offered a seat in the DO Program, and have paid their seat deposit and are thus "Accepted"
- c. AMP Portal: Using this online admissions portal, the Office of Student Affairs can filter the database of current applicants (maintained by the Burrell Office of Admissions) to see which applicants are considered "Offer-Accepted" and "Offer-Paid", both of which are considered "Accepted."

2.1 Communication Groups

- a. Accepted students are divided into communication groups based on when their deposit is paid during the application cycle
 - i. Group A – before six (6) months prior to matriculation
 - ii. Group B – between six (6) months prior to matriculation and 28 days prior to May 1st.
 - iii. Group C – between 28 days prior to May 1st and 60 days prior to matriculation
 - iv. Group D – between 60 days prior to matriculation and beginning of June
 - v. Group E: between beginning of June and Orientation Week

3.1 Pre-Matriculation Checklist

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- a. An online checklist link will be sent to each Accepted student as their seat deposit is confirmed.
- b. A checklist is generated for each group, due to deadline information being slightly adjusted based on when the student's seat deposit was paid
- c. The Checklist includes the following information:
 - i. Welcome Message from Student Affairs (Group A only)
 - ii. Housing Options (Group A only)
 - iii. Link to Class Facebook page
 - iv. Student Affairs Letter
 - v. Health Insurance information
 - vi. White Coat Ceremony
 - vii. Ordering the Medical Student White Coat
 - viii. Creating Castlebranch Account
 - ix. Background Check and Drug Screening
 - x. TB Screening
 - xi. BLS certification
 - xii. Required Medical Equipment
- d. Accepted students will provide their signed acknowledgement that they have read and received the checklist.
- e. When updates are made to checklist after students have accessed it, an email is sent to them notifying them of the updates, and the need for them to review the new items.

4.1 Sending Email Templates

- a. AMP Portal
 - i. Login to AMP at <https://applicant.burrell.edu/Security/Login.aspx>
 - ii. Make certain that the Applicant Year in the top right corner is correct. The Applicant Year is equal to the year in which the student will matriculate.
 - iii. Select the "APPLICANT" tab on the menu bar.
 - iv. Search for the applicant(s) in one of the following two ways:
 - 1. By Status: You can list all Offer-Paid or all Offer-Accepted students by selecting "Status" in one of the selection drop down menus, ensure the middle option says "Contains", and the search text box contains either "OP" for Offer-Paid or "OA" for Offer-Accepted. Then click the "Search" button. The results are displayed beneath the Search area.
 - 2. By Name: if there is a minimal number of applicants to send the emails to, select "Last Name" in the drop-down menu, ensure the middle option says "Contains", and enter the applicant's last name. Then click the "Search" button. The results are displayed beneath the Search area.
 - v. Using the results list, click the check-box to the left of each applicant you desire to send emails to during this session. As you select applicants, each selected name and total number of names selected will appear in the "Total Selected" box to the right of the Search area.
 - vi. Once you have selected all desired applicants, choose the "Email Template" option from the menu on the left-hand side of the screen.

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- vii. The “Applicant Template Email” screen will appear. In the “FROM” drop-down menu, make sure the address is studentaffairs@burrell.edu.
- viii. From the “Email Template to Send” drop-down menu, choose the email template you would like to send to the selected applicants.
- ix. If an attachment is necessary, click the “Add Attachment” button, and select “Student-Affairs-Documentation” in the Directory drop-down menu. Clicking on the filename will allow you to preview the attachment and clicking “Attach” will attach it to the email template. Click “Done” when you are finished attaching files. If you attached a file by mistake, you can remove it by clicking “remove.”
- x. Make sure that “studentaffairs@burrell.edu” is listed in the CC or BCC box and the checkbox to the left is checked.
- xi. Click “Send” to send the emails. You will see a red text notification on the screen that the emails have been sent.
- xii. To send additional emails, simply repeat steps viii through xi.
- b. Outlook
 - i. Find a copy of the email message you’d like to sent in the “AMP Communication” folder in studentaffairs@burrell.edu.
 - ii. Click the icon to Forward the Email.
 - iii. Delete all text except for the content of the email previously sent to another applicant.
 - iv. Delete the “FW:” from the Subject line
 - v. Add the applicant’s email address in the “TO:” line and add studentaffairs@burrell.edu in the “CC:” line.
 - vi. Revise the date included at the top of the message (if applicable), to reflect the current date.
 - vii. Revise the name in the greeting to reflect the current recipient.
 - viii. Click “Send”

5.1 Pre-Matriculation Communication Tracking

- a. **AMP:** All email templates sent to an applicant from the AMP portal are tracked. In order to see which email templates have been sent for each applicant,
 - i. Click on the name of an applicant in the Search Results and an Applicant Summary page will appear.
 - ii. Select the “Comm History” tab from the menu halfway down the page.
 - iii. By selecting “Email” in the drop-down menu, a list of all emails sent via AMP to this applicant is displayed.
- b. **Outlook:** By adding studentaffairs@burrell.edu to the CC or BCC line in all communication, a copy of each communication is sent directly to the Student Affairs email. All pre-matriculation emails are transferred manually into the “AMP Communication” folder in the Student Affairs email account in Outlook.
- c. **Access Database:** Once a copy of a pre-matriculation email is received by studentaffairs@burrell.edu, the date that the email was sent to the applicant is recorded in the appropriate field in “AMP Communication Status” query in the Student Affairs Access Database. Students’ acknowledgement of the Pre-Matriculation Checklist will also be indicated.

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6. Reports/Charts/Forms/Attachments/Cross References

Identify if any reports are required to include data elements.

7. Maintenance

Developed by Executive Director of Student Affairs and Associate Director of Student Affairs.

8. Signature

Approved by

05.09.2023

Department Head of Student Affairs

Date

9. Distribution List

Internal/External

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
05.09.2023	2.1, 3.1	Updates to process		5.19.2023