



# TD Client Data Flow

You've automated the ISIR process with TD Client. Let StudentForms and CL Connect streamline and automate the entire ISIR process, saving you time and energy. Read on for how the data flow works. **Action items your Financial Aid Office needs to complete are colored in Blue.** Action items your IT team needs to complete are colored in Orange.

01

## Automation Cycle of ISIR Receipt with CL Connect

- ✓ Institutional ISIRs continue to be delivered to your Financial Aid Office SAIG Mailbox.
- ✓ CampusLogic connects TD Client to [CL Connect](#), ISIR files will automatically flow through.
- ✓ **IT will need to download CL Connect.**
- ✓ **To support CL Connect, IT must set up two folders:**
  - a. **ISIR Uploads (for new and subsequent ISIRS)**
  - b. **ISIR Corrections**
- ✓ Once ISIRs are in CL Connect, CL Connect will absorb them and drop them into StudentForms.

02

## Communications

- ✓ For those ISIRs that have student-actionable codes or have been selected for verification, the student will receive a series of communications from StudentForms reminding them of tasks to be completed or tasks that have been added or waived.
- ✓ **The Financial Aid Office will notify students selected for verification that each must create a StudentForms account.**
- ✓ **The Financial Aid Office can use the assets in [the rollout kit](#) to communicate to students what they need to do.**

03

## StudentForms Tasks

- ✓ The students will need to verify their name, SSN, and DOB to initially create their account and link to a valid ISIR.
- ✓ After a student logs in to the school portal (for SSO schools) or using their StudentForms username/password (for Direct sign-on schools), he or she will be presented with any verification or appeal tasks for active aid years.
- ✓ StudentForms will assign actionable tasks to the student.  
Note: Tasks will not populate until a student creates an account in StudentForms.
- ✓ Documents uploaded by the student will be automatically passed back via CL Connect to be integrated into your institutions imaging system.
- ✓ **The Financial Aid Office reviews the documents submitted by the student and either completes verification or submits processing corrections.**
- ✓ **The Financial Aid Office has the option to reject or request new documents based on their review process.**
- ✓ When a student is verified, this information will automatically update your SIS via CL Connect so that both StudentForms and your SIS are in synch.

04

## Automation Cycle of ISIR Corrections with CL Connect

- ✓ Verified students are automatically updated through CL Connect and to the institutions SIS.
- ✓ If there are corrections, they will automatically be batched through CL Connect and into the institution's ISIR Uploads folder.
- ✓ TD Client automatically sends the ISIR Corrections.



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