

# Batch SAR and Batch Annual Funding Notice

09/11/2024 4:43 pm CDT

The first step is to create a customized cover letter for your clients (SAR/AFN only). If you will be printing and mailing the letters, you may set options for the cover letter including font size and page margins. You may also generate a spreadsheet file for the purpose of generating mailing labels/envelopes by clicking on the "Print Address Labels Only (Single File)" link.

The next step is to generate an edit list of client plans. This may be done by clicking on the link called "List Plans."

After you have prepared your cover letter and have made sure that all plans requiring a SAR/AFN are showing up on the list of plans, you are ready to generate the respective document/form.

See below for more information about each function of the Batch feature.

## **Edit Cover Letter Options (SAR/AFN only)**

After clicking on the "Edit Cover Letter Options" link, you will be presented with a pop-up window containing various options.

### **Date**

The Cover Letter will default to today's date, as indicated by the 'Today' setting under Letter Date. The date will be placed on the cover letter using the form: Month Day, Year. E.g. July 4, 2006. You may also set the date to an arbitrary value by selecting 'Fixed Date' from the drop down box. You will then need to enter a date in the Date field. The date entered into the Custom Date Field will be used in the cover letter exactly as entered.

### **Font Size**

The default font size for the cover letter is 10pt. You may change this value by selecting the appropriate font size from the drop down box. The available font sizes are: 8pt, 9pt, 10pt, 11pt and 12pt. The font size only affects the cover letter and does not alter the font size of other documents.

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### **Margin**

The margins for the cover letter may be set in inches. The default margins are 1" for each side. You may set each margin independently of the rest in order to conform to the letterhead or paper you will be using to print the cover letter. In order to change a margin, you will need to enter a new margin value in the appropriate margin box. You may set margins as a fraction such as 1.33 or whole numbers like 1.

### **Sender**

You may enter a name into the "Email Sender (Friendly Name)" field to display a name that may be recognizable to your client(s) upon receipt of the e-mail. Additionally, you may enter the "Email Sender Address" and "Email Sender (Carbon Copy)" address into the appropriate fields. After making changes, please be sure to click "Save" to save the changes that have been made.

### **Letter Body**

A default cover letter is provided for your use. You may modify the default cover letter or use your own text. The cover letter allows for several format codes, which alter the appearance of the document.

Format Codes are available which affect spacing (tab/paragraph) as well as lists (numbered).

In order to place a tab in the body of the letter, you will need to enter "[tab]" (without the quotes) at the location you wish a tab to appear.

In order to start a new paragraph in the body of the cover letter you will need to have an empty line in the body text.

You may also use a numbered list, by inserting "[numlist]" (without the quotes) into the cover body at the location you wish numbering to start. A numbered list is stopped by entering "[normal]."

### **Save/Cancel Buttons**

After making changes to the cover letter options, you will need to click on the "Save" button. In order to close the cover letter options window, you will need to click on the "Cancel" button. You may close the cover letter page without saving your changes by clicking on the "Cancel" button.

### **Review Cover Letter (SAR/AFN only)**

The review cover letter link may be used to generate a sample cover letter based on the cover letter options. After clicking on the "Review Cover Letter" link, a cover letter for the first plan will be generated and delivered as a Microsoft Word document.

After you are satisfied with the appearance of the cover letter, you may continue generating the SAR/AFN and cover letter documents for each plan.

### **List Plans**

Clicking on the "List Plans" link will open a pop-up window containing all of the plans that may qualify for the SAR/AFN. You will also have the option to download the list of plans into an Excel spreadsheet.

### **Do Edit Checks**

Edit checking will be performed on all SAR/AFNs. A summary will appear at the top of a new web page showing the results of the edit checks for each plan. If a plan has errors, you may click on the plan name to review the errors for that plan.

### **Print Address Labels Only**

Clicking on the "Print Address Labels" link will create an Excel spreadsheet which contains the information necessary to print address labels or envelopes for the plans. It will be necessary to use the mail merge feature of

Microsoft Word in order to print the address labels or envelopes. The Excel spreadsheet will contain the following columns:

- Plan Name
- Plan Administrator
- Company Name
- Address Line 1
- Address Line 2
- City
- State
- Zip Code

#### **Print Cover Letter Only (SAR/AFN Only)**

A cover letter will be generated for each plan using the cover letter options. The cover letters will be returned as either a single Microsoft Word document, containing the cover letter for each plan or as a zip file which contains a separate Microsoft Word document for each plan.

#### **Print SAR/AFN Only**

A document/form will be generated for each plan and returned to the user as either a single Microsoft Word document, or as a zip file containing a separate Microsoft Word document for each plan.

Should the size of the generated document/form file exceed 750KB, it will be compressed into a zip file. This will generally only happen if you are generating documents/forms for a large number of plans.

After clicking on the "Print SAR/AFN Only" link it may take several seconds for the document to be generated. This is especially true for customers who are generating documents/forms for a large number of plans, as it takes about a minute to generate the SAR/AFN for 400 plans. After clicking on the "Print SAR/AFN Only" link, please be patient and do not cancel the operation or click the link again, as the document will be delivered to your browser as soon as it is generated.

#### **Print Letter and SAR/AFN (SAR/AFN Only)**

Both the Cover Letter and SAR/AFN will be generated for each plan and returned to the user as either a single Microsoft Word document containing all of the documents, or as a zip file containing a separate Microsoft Word document for each plan.

Should the size of the document/form file exceed 750KB, it will be compressed into a zip archive. This will generally only happen if you are generating documents for a large number of plans.

After clicking on the "Print Letter and SAR/AFN" link it may take several seconds for the document to be generated. This is especially true for customers who are generating documents for a large number of plans, as it takes about a minute to generate the SAR/AFN for 400 plans. After clicking on the "Print Letter and SAR/AFN" link, please be patient and do not cancel the operation or click the link again, as the document will be delivered to your browser as soon as it is generated.

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