

WebAdMIT Workflow: The Basics

Indiana University Graduate CAS

INDIANA UNIVERSITY

Agenda & Learning Objectives

Agenda

- 1. What is WebAdMIT
- 2. Workflow Overview
- 3. How to Find an Application
- 4. How to Process Your Action Lists
- 5. How to Add, Change & Create Local Status
- 6. Processing Common Admissions Decisions
- 7. Fee Waivers
- 8. Work Groups & Access
- 9. What's Next?



Learning Objectives

- 1. Understand WebAdMIT terms and draw parallels with Indiana University admissions language.
- 2. Understand the difference between Application Status, Local Status, and Decision Codes.
- 3. Demonstrate the ability to add / change local status on an individual application, or in batch.
- 4. Process common admissions decisions, and defers.
- 5. Identify the Work Group you need access to in WebAdMIT in order to carry out your graduate admissions responsibilities.
- 6. Facilitate the Indiana University Graduate CAS faculty and staff onboarding process within your department.



What is WebAdMIT

WebAdMIT is What You Make It

It's your trusty Ford!





Or your Fancy Maserati



What is WebAdMIT?

- The backend of the IU Graduate CAS (Replaces the Administrative Center found in one.iu.edu)
- Where you manage applications & communicate with applicants
- Where you process admissions decisions (your new Action List and eApp eDoc) and "route" applications to the IUPUI Graduate Office & OIA (for international applicants)
- Data & report warehouse (may replace your use of IUIE)
- An enrollment management system you can customize for your internal admissions process



Where you access the Configuration Portal to configure your programs (designations)



Applicants	Recently Submitted Designations							
			← Prev 1 2 3					
Applicant Lists	Name	Indiana University Graduate CAS ID	De					
Received Applicants - Workflow Example	Farris, Michele D.	6491161446	TEST					
Return to Department - Norkflow Example	Applicant, International	4154771580	TEST					
	Shoe, Jim	1792518658	Test E					
Applicant with J Name	Bickel, Jack	6266992729	TEST					
₋ist Manager	Henry, Monica	8631154215	Test E					
Reports & Exports								
Export Manager	 Recently 	Updated Applicar	nts					
		← Prev 1 2	3 4 5 6 7 8					
Report Manager	Name	Indiana Univers ID	sity Graduate CA					
PDF Manager	Ryan, Tim	3965664609						
Recent Files	Ryan, Tim	3965664609						
	Ryan, Tim	3965664609						
Management	Applicant,	4154771580						
▼ Help								

Glossary

- 1. Program (aka Q4) what each graduate / professional program representative creates in the WebAdMIT Configuration Portal prior to soft-launch. This encompasses SIS data required to create an application in PeopleSoft campus, career, program, plan (and subplan as needed), and term. From the applicant portal this is titled "Program Materials".
- CAS Cycle The application portal and WebAdMIT portal that contains a calendar year's worth of entry semesters. The 19-20 CAS cycle will include applications for the following semesters: Winter 2019, Spring 2020, Summer 2020, and Fall 2020.
- Applicant Lists This is your Action List, and where you will process applications. Lists can be created based on Applicant Status, Local Status, Decision Codes, application fields, or a combination of fields using and/or statements to create a "Composite List".
- 4. Work Group The collection of permissions granted within WebAdMIT. A Work Group dictates what an admissions user can do, and what they can see.
- 5. Manual Designation a designation administratively added to an applicant's record in WebAdMIT in order to move the application to a new program or term in the same CAS cycle.
- 6. Local Status This is how you track your applicants. This replaces the "Action", "Reason" drop down options, and "Take Action" found on the current eApp eDoc. This is how you route applications to the Graduate Office or OIA.

CAS Cycles – A Visual

* New URL for the Applicant Portal for each CAS Cycle!



Required WebAdMIT Workflow Steps

- 1. Log into WebAdMIT and review your required Applicant Lists
- 2. Process your Action Lists as needed during your admissions cycle by adding / updating Local Status
 - Add Local Status for Received and Complete applications
 - Update Local Status for Program / Term Change and Returned to Department applications as needed
- 3. Communication with your applicants using the WebAdMIT email template feature or outside CRM/system



Optional WebAdMIT Steps

- 1. Create Optional Requirements
- 2. Create Optional Local Statuses
- 3. Create Optional Lists
- 4. Create Optional Custom Fields
- 5. Create Admissions Committee / Interview Applicant Review Forms Implement Assignments
- * Attend the WebAdMIT Advanced Class to learn more







Workflow Overview

Three Methods to Track Applicants

Workflow in WebAdMIT is driven by the following statuses, and in this sequence:

- Application Status system generated (In Progress –> Complete continuum)
- 2. Local Status assigned by WebAdMIT users in the departments and the IUPUI Graduate Office and OIA.
- 3. Decision Codes admissions decision (tied to Local Status)



Application Status

- 2. **Received** an applicant has completed all required fields / uploads and submitted the application and paid the fee. Any required and outstanding recommendations are missing (if applicable).
- 3. **Complete** all required recommendations have arrived for these applicants (if applicable) and they have paid the application fee. Note: you will not have the option to manually mark an application complete BUT can use Local Statuses to track when an application is deemed Complete by your standards.
- 4. On Hold
- 5. Undelivered
- 6. Manual Manual designations allow an applicant to be assigned a new designation within WebAdMIT. The applicant will see both their original designation and new designation in the Applicant Portal.



Fun with Local Statuses!

- 1. You can create as many Local Statuses as you like to represent the granular steps within your admissions process, OR
- 2. You can use the pre-set "Internal Review" Local Status, that is tied the "Internal Review" Decision Code





Local Status / Decision Codes

Added by	Local Status	Decision Code	Pulled by	SIS Final?
Program	Various local statuses created by program staff to customize the internal application workflow or Internal Review	Internal Review	Program	Not final
Program 1	Program/Term Change (Manual Designation required)	Internal Review	Program 2	Not final
Program	Deny	Deny (SIS: DENY)	SIS - Batch	Final
Program	Applicant Withdraw	Applicant Withdrawn (SIS: WAPP/WBFR)	SIS - Batch	Final
Program	Recommend for Admission	Enroute	Central Graduate Office	Not final
Program	Recommend for Admissions - Term Started	Enroute	Central Graduate Office	Not final
Program	Defer - next CAS Cycle (same term next year)	Deferred - next CAS Cycle	Program	Not final
Central Admissions Office	Return to Department	Enroute	Program	Not final

Designations by Local Status

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Decision Codes

- 1. You do not directly place a Decision Code you "Take Action" by assigning a Local Status
- Deny and Applicant Withdrawn Local Status = You are in control now – these decisions write directly to SIS each evening
- 3. You can search and create lists based on Decision Codes



How to Find an Application

Searching for an Application

- 1. Navigate to Applicants (left navigation bar)
- 2. Click Search
- 3. Use any of the fields seen here to search..
- 4. Pull a quick view lists based on App Status, or
- 5. Clipboard allows users to store an ad hoc list of applicants for quick access.

	Search Applicants						Hide Filters	Sort Results 👻
Applicants	Active Filters: None 35 applicants]
Search	Last Name			Local S	Status			•
Search Assignments	First Name			Decisio	on Code			•
ocaron Assignments	Indiana University			Desigr	nation Submitted			
Search Interviews	Graduate CAS ID State/Province		•	Date Desigr	nation			×
Clipboard	Email Address			Applica On	ation Last Chang	jed		
In Progress Applicants				Reviev Preferr	ver red Phone Numb	er		
Received Applicants	Search Reset Crit	eria						
Complete Applicants	← Prev 1 2 Next → Name &							
On Hold Applicants	Indiana University Email Graduate CAS ID		Designa	tion	Appl. Status	L	ocal Status	Decision
Undelivered Applicants	Applicant, International intapp@ma 4154771580	ilinator.com	TEST UREDS Fa 20	TPHD	Received	None		None
Search Correspondence								

The Applicant Page (or eDoc)

Jim Shoe			
Indiana University Graduate CAS ID: 1792518658 Last Indiana University Graduate CAS Update on Aug 2, 2019 at 9:51 AM	Remove from 0	Clipboard	
	University ID App Center		1234566778
Contact Information			
▶ Designations			
▶ Scoring			
► Assignments			
► Interviews			
▶ Documents			
Evaluations			
Personal Information			
Indiana University Graduate CAS Custom Questions			
► Custom Questions			
► Custom Fields			
► GPA Overview			
► Stans			
Education			

Header: Univ. ID, App Center These panels may or may not contain data depending on your needs

- IU Graduate CAS Custom Questions (Q1 – 3 custom ?s)
- Custom Questions Q4 ?s
- Custom Fields SIS data AND data you add (Univ. ID, App Center, Residency, most recent test scores GRE, TOEFL, IELTS, GRE subject for Biology. Chemistry, Lit in English, Mathematics, Physics, & Psychology) *Note – program / plan / subplan & term code tied to most recent CAS application! May not reflect your program info -

requesting Liaison fix this!

How To Process Your Action List

Action List Overview (Applicant Lists)

- 1. Applicant Lists can be created based on the following:
 - Application Status
 - Local Status
 - Decision Codes
 - Application fields (Think GPA 3.5 and higher)
 - A combination of application fields using and/or statements to create a "Composite List" (Think, GPA 3.0 and higher AND those living in Indiana)



Required Action Lists (created for you)

Applicants
 Applicant Lists

Received Applicant

Return to Departme

Received Applican Program/Term Cha

Return to Departm

List Manager

- 1. Received (Application Status)
- 2. Completed (Application Status)
- 3. Program / Term Change (Local Status) - Manual Designation
- 4. Returned to Department (Local Status)



	Com	piered Applicants			
	9 appl	icants			
_	۲	Name & Indiana University Graduate CAS ID	Email	Designation	Appl. Status
flow Example	×	5266992729	JackBickel@mailinator.com	TEST Philanthropic Studies On Campus MA Spring 2020	O Complete
KIOW EXample	×	6523955971	lt l@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	O Complete
	Z	, Dezra 2681697974	d(≽s@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	O Complete
	Z	Michele D. 6491161446	m s@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	O Complete
		I r. Monica	m v@iu.edu	Test Envrnmtal Policy &	O Complete

Processing Your Action Lists

1. Received and Completed Application Status

- IF you want to distinguish between those applications you have reviewed and are moving through your
 internal review process from those that are NEW you must apply an internal review Local Status that
 represents where this applicant is in your application review process (or Internal Review Local Status)
- 2. Program / Term Change Local Status (+ Manual Designation)
 - Update to the appropriate internal review Local Status that represents where this applicant is in your application review process (or Internal Review Local Status)
- 3. Returned to Department Local Status
 - Look in the Notes section in Applicant's page to determine why the application was returned
 - Update with the appropriate Local Status to route back to the central office



Optional Action Lists (you create)

- 1. List based on the Local Status "Internal Review", or
- 2. Lists based on Local Statuses you create to facilitate your internal admissions workflow –tie to "Internal Review" Decision Code
- 3. In Progress applications (Application Status)
- Deferred Next CAS Cycle (only if your program utilizes this Local Status / functionality)





How To Add, Update & Create Local Statuses

How to Add / Update Local Status

- 1. You must add / change local status to move an application through the admissions process (internal and / or campus)
- 2. This equates to "Take Action" in the current Kuali workflow system
- 3. Your Action List (and the action list of the Graduate Office and OIA) depends on it!

Add / Update Local Status Individually

- 1. Navigate to the Applicant Details page via Search or Applicant Lists
- 2. Go to the Designations panel
- 3. Use the drop down and select appropriate Local Status





DONE!

Add / Update Local Status in Batch

- 1. Navigate to the Applicant List you want to process
- 2. Select the applicants you want to apply the Local Status to
- 3. Click List Actions
- 4. Click Change Checked Applicants' Status
- 5. In the window that appears, select the designation(s) you'd like this change to impact, then click Next.
- 6. Select the Local Status you want to add and click Next
- 7. <u>Review the changes this action</u> <u>cannot be undone in batch!</u>
- 8. Click Save





* Same action available with Search and Clipboard functions

How To Create a Local Status



- ✓ Log into WebAdMIT.
- ✓ Click Local Status
- ✓ Click New Local Status

I INDIANA U	NIVERS	SITY			Ind	iana University (
F					Ind	iana Universi
Applicants	Loca	l Status Manager			New Lo	ocal Status
		Title	Decision	Color Code	Description	Actions
		In-progress Outreach #1	Internal Review			1
Reports & Exports		TEST - App Ready for Review	Internal Review		Application is ready for re	1
▼ Management		App Ready for Review	Internal Review		Application is ready for re	Ø 🗊
Admissions Users		Missing Requirements	Internal Review	none		1
		Missing Transcripts	Internal Review		Applicant did not upload tr	Ø 🗊
Work Groups		TEST - Missing Transcripts	Internal Review		Applicant did not upload tr	1
Custom Fields		To Be Interviewed	Internal Review		For Accelerated program only.	Ø 🗊
Local Status		Missing Robaviaral Document	Internal Review		Answered yes to behavioral	∥☆

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How To Create a Local Status - Continued

- ✓ Enter a Title (e.g. "Committee Review Required")
- ✓ Verify that the Active check box is selected
- ✓ Select the "Internal Review" Decision Code to apply to the new Local Status
- Optional Select a Custom Color if you'd like to associate a color with the Local Status (We have coded central office statuses RED)
- Optional Select an Email Template to link to this Local Status (Advanced Class or visit https://help.liaisonedu.com/WebAdMIT_Help_Center/WebAdMIT_Manual/Corresponding_with_Applicants/2. Email_Templates)
- ✓ Optional Enter a Description
- Select the Programs associated with this Local Status If you are responsible for multiple programs this becomes very important!
- ✓ Click the Create button
- Now all of the Local Statuses will appear on the Local Status Manager page. To edit a local status, click the pencil icon. Your New Local Status can only be created by those in the Director of Admissions Work Group for your department.

Processing Common Admissions Decisions

Recommend for Admission

- 1. Upload required documents to the Applicant's Detail Page (the new eDoc) if applicable (e.g. departmental admission letters, exception requests, funding letters, FCA reports etc.)
- 2. Change the Local Status to "Recommend for Admission"
- 3. This change in Local Status will allow the applicant's file to now appear in the central graduate office's Action List.
- 4. International student once the central graduate office processes the admissions they will update the Local Status that populates the Office of International Services / Admission Action List.



How to Upload Documents

- 1. Those in the Application Processor and Director of Admissions Work Groups may upload additional documents for internal use.
- 2. Navigate to the Applicant Page.

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- 3. Navigate to the **Admissions Uploaded Documents** subpanel and enter a description (name).
- 4. Click **Choose File** to find and select the document on your computer, then click **Upload File**.
- 5. * These documents will NOT be included in the Full Application PDF.

	▼ Documents						
	(and the second	Y		· · · · · · · · · · · · · · · · · · ·			
	Applications (1)	Transcripts (3) Applicant Up	bloaded Documents Application L	Level (3)	Applicant Uploaded Documents Pr	ogram Level (2)	Admissions Uploaded Documents (1
	Attached Document Name			Upload Da	te	Uploaded By	
	Sample 🗙			Feb 05 201	9		
	Limit of 15mb per file, 8 files	per Applicant. Allowed file types a	e: .pdf, .doc, .docx, .txt				
ANA UNIVERSITY	Upload File	Choose Fil	No file chosen				

Deny

- 1. Change the applicant's Local Status to "Deny" (individually or using Batch Action).
- 2. This Local Status is tied to the Decision Code "Deny" and will write to SIS overnight.
- 3. This status is final these applications do NOT route anywhere after you add this Local Status.
- 4. You will not be able to undo this without contacting your central admissions office or international admissions.



Withdraw

- 1. Change Local Status to "Applicant Withdrawn Before Admission"
- 2. This Local Status is tied to the Decision Code "Applicant Withdrawn" and will write to SIS overnight.
- 3. This status is final these applications do NOT route anywhere after you add this Local Status.
- 4. You will not be able to undo this without contacting your central admissions office or international admissions.



Defer Admissions Decision

- 1. It's Complicated! See Page 11 14 of the Workflow Training Document for full details.
- 2. <u>We recommend applicants complete a new designation (Q4), because only limited application</u> <u>data will be available if you utilize #3 or #4.</u>
- 3. <u>Defer to another term within the same CAS cycle</u> update the local status to "Program/Term Change" and add the new program/term designation manually using Manual Designation (next slide)
- 4. <u>Defer to a same term in the next CAS cycle</u> update Local Status to "Defer next CAS Cycle". Program code, start term, and start year (+1) must match. Note that for deferred applicants in the new cycle, only the Applicant Header, Contact Information, and Designations panels contain data. You would navigate back to the previous CAS Cycle in WebAdMIT to view full details.
- 5. Deferring start term processed AFTER admission decision made contact your central graduate / international office. <u>*If the student is international you MUST notify the Office of International Affairs or there could be major delays in processing VISA documentation.</u>



Manual Designation

- 1. Can be used to update term and program within SAME CAS Cycle
- 2. Makes most sense when it is the same program and you are updating term!
- 3. You have to have permissions to manage both designations to do this.
- 4. You can also contact the Graduate Office to process Manual Designations
- 5. You will always apply the Local Status of Program/Term Change.

1. Go to the **Designations** panel on the desired *Applicant Details* page.

▼ Designa	tions						
Designations							
					Add D	esignation	
Designation	Local Status	Decision Code	Application Status	Submitted Date	Completed	Last Exported	Details
TEST-Graduate Non-Degree Sp 20	None	 Unassigned 	O Complete	Jul 29 2019	Jul 30 2019		Details

- 2. Assign the initial program a Local Status of Program/Term Change.
- 3. To change the program in WebAdMIT, click the Add Designation button.



WebAdMIT Access

Work Groups

- 1. You can only be in 1 Work Group choose wisely
- 2. The Work Group title does not always reflect your title
- 3. Visit <u>https://graduate.iupui.edu/doc/faculty-staff/UniCAS/UniCAS-</u> workgroups.pdf

Request Access

- 1. Identify your Work Group
- 2. Complete the required FERPA tutorial and sign the Acceptable Use Agreement if needed.
- 3. Navigate to the WebAdMIT Access request form <u>https://survey.graduate.iu.edu/machform/view.php?id=58203</u>
 - This will be added to the University Graduate School Add / Remove User eDoc for new staff
- 4. Complete the form and click the Submit button BEFORE August 30th!
- 5. Access will be protected through the use of Single Sign On users will need to Duo authenticate.
- 6. Access to WebAdMIT production environment September 9th



What's Next?

The Extras

- 1. Invitation Codes used to apply after the deadline
 - Request through Liaison <u>https://fs21.formsite.com/riretonliaison-intlcom/g8jp5mspd3/index.html?1565727447459</u>
 - Within 2 business days Liaison will produce the invitation code file and send it to the campus user.
- 2. For IUPUI campus only application fee disbursement and fee waiver billing quarterly
- 3. Liaison International Monthly Release Notes and Trainings
 - Note we may not be able to enable new functionality until the following CAS cycle



Fee Waivers

- 1. Fee Waivers See <u>https://graduate.iupui.edu/doc/faculty-staff/UniCAS/UniCAS-fee-</u> waiver-training.pdf
 - 3 Options Coupon Codes, Q4 trigger question, \$0 application fee billed quarterly
 - Coupon Code Request Form https://survey.graduate.iu.edu/machform/view.php?id=57248
 1 code per applicant request a batch of codes for each CAS cycle
- The Military Status question will automatically receive a fee waiver granted by the University IF "Active Duty", "Veteran" or "Member of Reserve or National Guard" is selected.
 - You will not be billed for these applicants.

Advanced WebAdMIT Topics

- 1. Customizing WebAdMIT for your admissions process
- 2. Creating Requirements
- 3. Creating Custom Fields
- 4. Creating email templates
- 5. Creating Assignments and Interview Forms
- 6. More on Local Statuses
- 7. Reports and Visual Analytics





Additional Resources

- 1. View the <u>recording</u> of this Webinar on *The Basics*.
- 2. Workflow Training Document <u>https://graduate.iupui.edu/doc/faculty-</u> <u>staff/UniCAS/UniCAS-workflow.pdf</u>
- 3. IU Graduate CAS FAQ Page for Faculty and Staff <u>https://graduate.iupui.edu/faculty-staff/cas.html</u>
- 4. WebAdMIT Help Center <u>https://help.liaisonedu.com/WebAdMIT_Help_Center</u>
- 5. Coming Soon Applicant Help Center and Operations Manual



Thank you for your partnership on launching the Indiana University Graduate CAS!

For more information contact your campus trainers:

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