AD Application Processing Setup Guide v. 8.0

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This document is published as a baseline guide. Panel shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS/SOSS Student Administration team.

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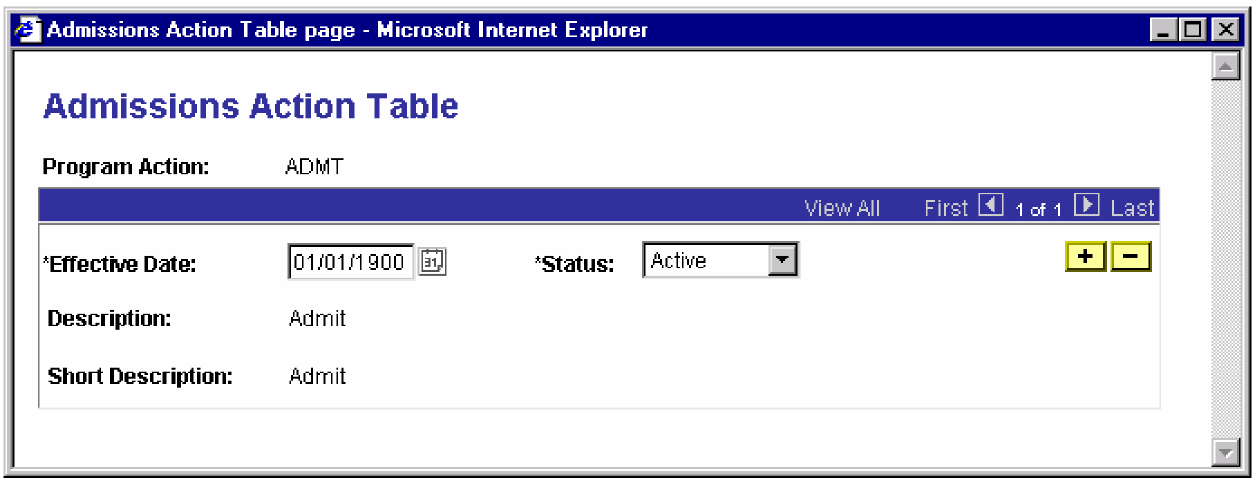
1.0 Setting up Admissions for Application Processing

PeopleSoft Admissions manages your campuses business processes and tracks applicants and all the educational and personal records you need to record and store. In order to accommodate the processing of applications, there are tables that need setup prior to admitting a student. You will find that some areas need to be discussed with other departments at your campus because of the impact to their business process. There are many inquiry pages that allow you to quickly view summarized information such as an applicant's progression and test scores stored for a prospect or applicant that were entered at time of processing the application.

The system's integration with the other modules, Campus Community, Student Records, Student Financials, Financial Aid and Academic Advisement considerably reduce repetitive data entry and improve communication across all departments. For example, when an applicant matriculates, the record automatically appears in PeopleSoft Student Records. This information is added only once but covers all the modules that are affected by this entry.

1.1 Admissions Action Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → Admissions Action Table



The Admissions Action Table page is used to view the delivered Admission program actions.

1.1.1 Considerations

These actions are delivered with programming behind them and must not be deleted.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the Program Action field in the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.
A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision.*
For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

If you Select this Program Action:	The System Updates the Program Status to:
Application Readmit Application Reconsideration	Applicant
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. These translate values should not be modified in any way. Any modification to these values would require a substantial programming/customization effort. You can, however, modify the *descriptions* of these values, if desired. Keep in mind, though, that the altered description needs to retain its original meaning to avoid confusion. The Program Status values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC—Active in Program
- AD—Admitted
- AP—Applicant
- CN—Cancelled
- DE—Deceased
- PM—Prematriculant
- WT—Waitlisted

The previous section details which admissions program actions set which program statuses. The chart below lists Program Action definitions and provides additional information about what happens when you choose a Program Action. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up

		enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	Once an action of reconsideration is taken, you can admit the applicant. You cannot take an action of *Admit* if the program status is *Cancelled.* You must first select a *Reconsideration* action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your admit level setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a	Same as for *Admit*.

	Conditional Admit action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a *Cancelled* status from an *Admitted* or *Active* status.	When revoking admission for a person who has a current action of *Matriculation,* and therefore an *Active* status, you must go to PeopleSoft Student Records to take this action. When you revoke admission from PeopleSoft Student Records, the Student Record program information is deleted and your application information is updated as *Cancelled Due to Admission Revocation.* If the person never had an action of matriculation, you can add an *Admission Revocation* action directly in PeopleSoft Recruiting and Admissions.
Deny	A person has been denied admission to an academic program.	None.
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with *Before Decision* as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A *Waitlist Withdrawal* reason indicates someone who did not want to accept a place on the waitlist.	None.
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed	None.

	all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a *Prematriculant* status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of *First Deposit.*	
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of *Matriculation,* you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. Once you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

1.1.2 Recommendations

You can change the effective date and status for the program action codes that are delivered with the system. You can make an action reason inactive by changing the effective date so that it will not be viewable to the end user. You must ***never*** delete a program action.

1.2 Program Action Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → Program Action Reason Table

Use the Program Action Reason Table page to enter and modify program action reason codes. Program action reason codes reflect the status of a student in a program starting from the applicant stage and throughout their academic career.

1.2.1 Considerations

This table is shared with PeopleSoft Student Records and reasons are also recorded here for Student Record-specific program actions.

This is a campus owned table because the values must map to the COSAR Data Element Accommodation Status and the Data Element Admission Status.

1.2.2 Recommendations

You can change the effective date and status for the program action reason codes. You can make a program action code inactive so that it is no longer available to your users.

Each program action reason a campus enters must be mapped to the following COSAR data elements. Failure to do so can result in catastrophic errors for reporting.

The following are the Data Element field values for the COSAR tables:
COSAR DED ACCOMODATION STATUS

A = Accommodated
B = Accommodated - Received application from another CSU campus
M = Unaccommodated - Redirected to another CSU campus
R = Accommodated - Sent application to another CSU campus
U = Unaccommodated
Z = Returned application (CO will treat as unaccommodated)

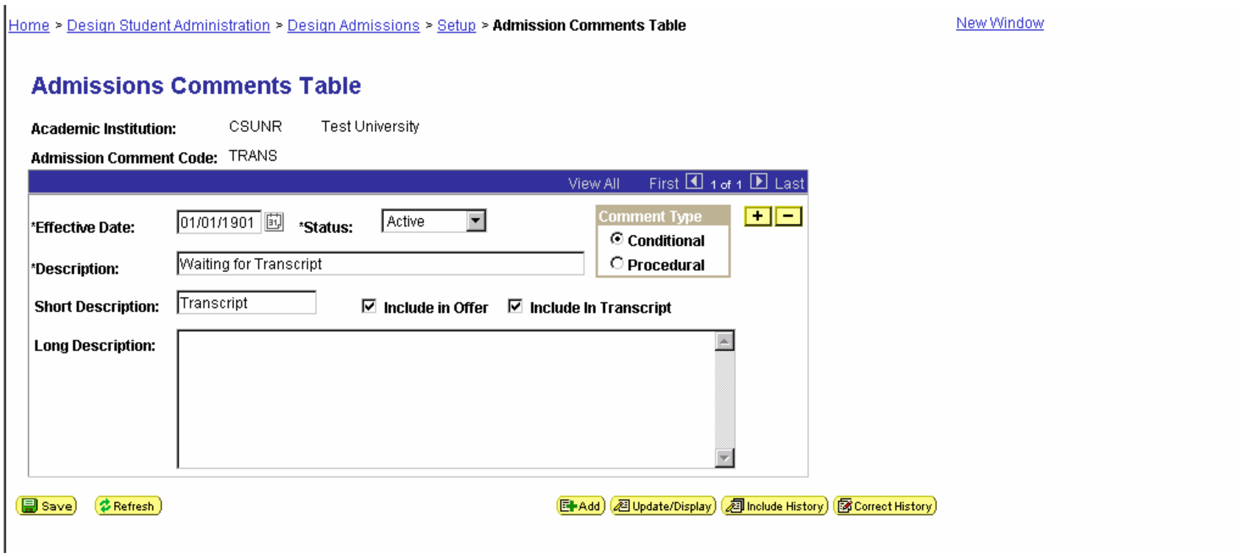
An Accommodation Status value must be entered. No default value is allowed.

<u>COSAR DED ADMISSION STATUS</u>

A = Admitted to the University
C = Conditional Admit
D = Denied Admission
E = In Evaluation ***(CO convert to 'I' – as of summer 2000)***
F = Admitted on Probation ***(CO convert to 'A' – as of summer 2000)***
H = Admitted with Honors ***(CO convert to 'A' – as of summer 2000)***
I = Incomplete File (default value)
N = Will Not Attend–Admitted ***(CO convert to 'A' – as of summer 2000)***
P = Provisional Admit * ***(CO count as 'I' – as of summer 2000)***
W = Withdrew Application before Admission to the University ***(CO convert to 'I'– as of summer 2000)***

1.3 Admissions Comments Table

Navigation: <u>Home→ Design Student Administration → Design Admissions → Setup → Admissions Comments Table</u>



This page is for recording generic comments that you can attach to an applicant. One use is to record conditions of admission. For example, you can define a comment such as "You must successfully complete all current coursework." You can set up admission comment codes that represent general admission comments, and then link the code or codes to the applicant. You can print the comments on the admission offer letter. The Admissions Comments Table is where you define admission comment codes.

1.3.1 Considerations

Comment Type: Indicates the type of comment that you are entering. Select **Conditional** if the comment is a condition for admission, and **Procedural** if the comment is for information only.

Include in Offer: Select this check box to include the code, description, short description, and long description on the applicant's admission offer letter. When you select this check box, the system automatically selects the **Include in Offer** check box on the Admission Comments page.

Include in Transcript: Select this check box to include the code and long description on the student's transcript. When you select this check box, the system automatically selects the **Include in Transcript** check box on the Admission Comments page.

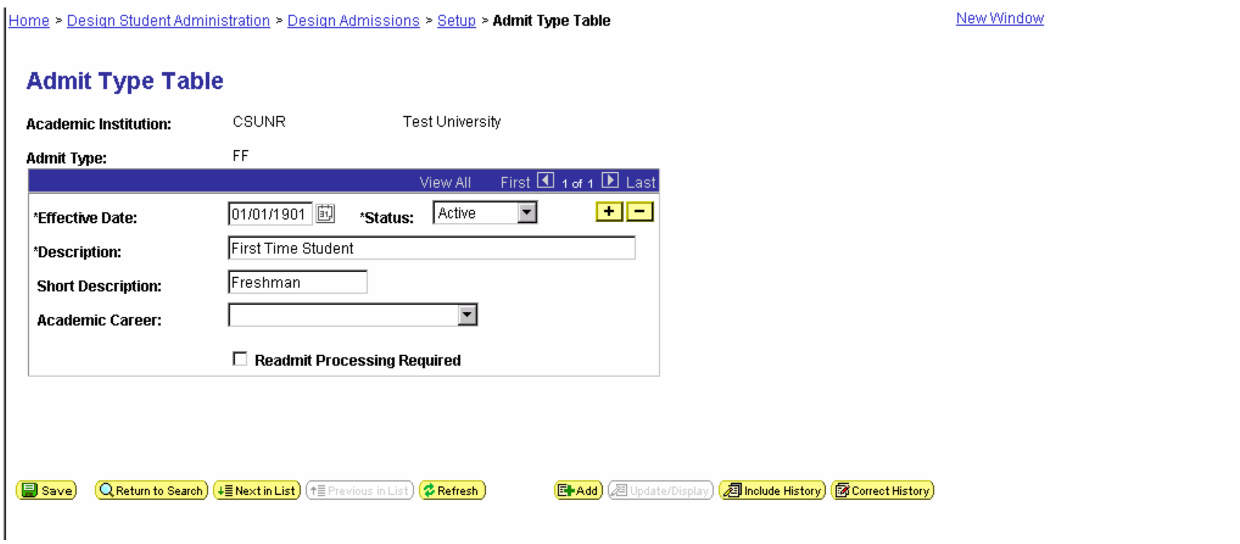
Long Description: Enter the full text of the comment for this admission comment code. The long description defaults to the Admission Comment page once you assign this code to the applicant.

1.3.2 Recommendations

By linking these comments to an applicant, you can include them in communications to the applicant.

1.4 Admit Type Table

Navigation: <u>Home→ Design Administration → Design Admissions → Setup → Admit Type Table</u>



You can assign an Admit Type to applicants to clarify the type of applicant, such as First Year, Readmit, Transfer, etc.

1.4.1 Considerations

Academic Career: Select the academic career**s** to which this admit type is related to if you want this type available for *only* that career. Do *not* select an academic career if you want this admit type available for *all* careers.

Readmit Processing Required: Select this check box if the admit type requires you to admit a person into an existing student record (for example, a person applies to reenter a career). When this admit type is entered on an application record, the system populates an existing program record rather than create a new record when the person matriculates.

1.4.2 Recommendations

All admit types must equal ERS (Enrollment Reporting System) field Enrollment Status. Please be aware that your set-up for this table must have the exact values listed below, i.e. 1, 2, 3, 4, 5, 6, 7. Failure to do this can result in catastrophic errors for reporting.

<u>Data Element Dictionary for Enrollment Status:</u>

For undergraduate students, code Enrollment Status as follows:

5 = FIRST-TIME FRESHMAN - Normally, a student who has earned college credit not later than the end of the summer immediately following high school graduation or a student who has not earned any college credit. Exceptions include:

Applicants who completed their high school program mid-year, who applied to the California State University for admission to the following fall term, and who enrolled in a California Community College in the spring term immediately preceding California State University admission.

Applicants who earned equivalent college credit through the CLEP or AP programs of the College Board.

Applicants who earned equivalent college credit through military coursework only.

Applicants who earned equivalent college credit through some nontraditional learning experience.

1 = CONTINUING UNDERGRADUATE - An undergraduate student who had units attempted at this campus during the prior term of the regular sessions.

2 = RETURNING UNDERGRADUATE - A former student returning after an absence of one or more terms of the regular sessions who had no units attempted elsewhere during the absence from the campus.

3 = UNDERGRADUATE RETURNING TRANSFER - A former student returning after an absence of one or more terms of the regular sessions who had units attempted elsewhere since the previous enrollment.

4 = UNDERGRADUATE TRANSFER - A student new to the regular session of this campus who is not a first-time freshman, and who does not hold a baccalaureate degree from any college.

6 = TRANSITORY UNDERGRADUATE - A student who is admitted under special procedures, but who has continuing status at another institution. This will include:

a) A visitor enrolled for a single specific quarter or semester term who is a degree candidate with continuing student status at another California State University.
b) A student with concurrent enrollment at another California State University.
c) A visitor enrolled through the Cross Enrollment program for a single course during a single specific term who is a matriculated student at a UC or California Community College campus.
d) A high school student enrolled for a single specific quarter or semester term, prior to completion of, and concurrent with, his high school program.
e) An exchange student who is enrolled for a single specific quarter or semester term through an authorized exchange program with another college or university.
f) A full-time permanent or probationary employee enrolled for a single specific quarter or semester term who is not a degree candidate with continuing student status.
g) A student participation in the "Sixty Years of Age or Older" program who is enrolled for a single specific quarter or semester term who is not a degree candidate with continuing student status.

7 = SUMMER EARLY-ENTRANT TRANSITORY UNDERGRADUATE – A student attending state-supported courses the summer prior to matriculation.

For postbaccalaureate and graduate students, code Enrollment status as follows:

1 = CONTINUING STUDENT - A student who, as a postbaccalaureate student, had units attempted at this campus during the prior term of the regular sessions.

2 = RETURNING STUDENT - A former postbaccalaureate student returning after an absence of one or more terms of the regular sessions who has no units attempted elsewhere.

3 = RETURNING TRANSFER - A former postbaccalaureate student who is returning after an absence of one or more terms of the regular sessions who has units attempted at another university or college since the previous enrollment.

4 = TRANSFER - A postbaccalaureate student new to this campus this term who has units attempted elsewhere as a postbaccalaureate student.

5 = FIRST-TIME STUDENT - A student who is classified as a postbaccalaureate student for the first time, who has all units attempted recorded prior to receiving the bachelor's degree.

6 = TRANSITORY STUDENT - A student who is admitted and registered at the reporting campus under special procedures, but who has continuing status at another institution.

a) A visitor enrolled for a single specific quarter or semester term who is a degree candidate with continuing student status at another California State University.

b) A student with concurrent enrollment at another California State University.

c) A visitor enrolled through the Cross Enrollment program for a single course during a single specific term who is a matriculated student at a UC or California Community College campus.

d) An exchange student who is enrolled for a single specific quarter or semester term through an authorized exchange program with another college or university.

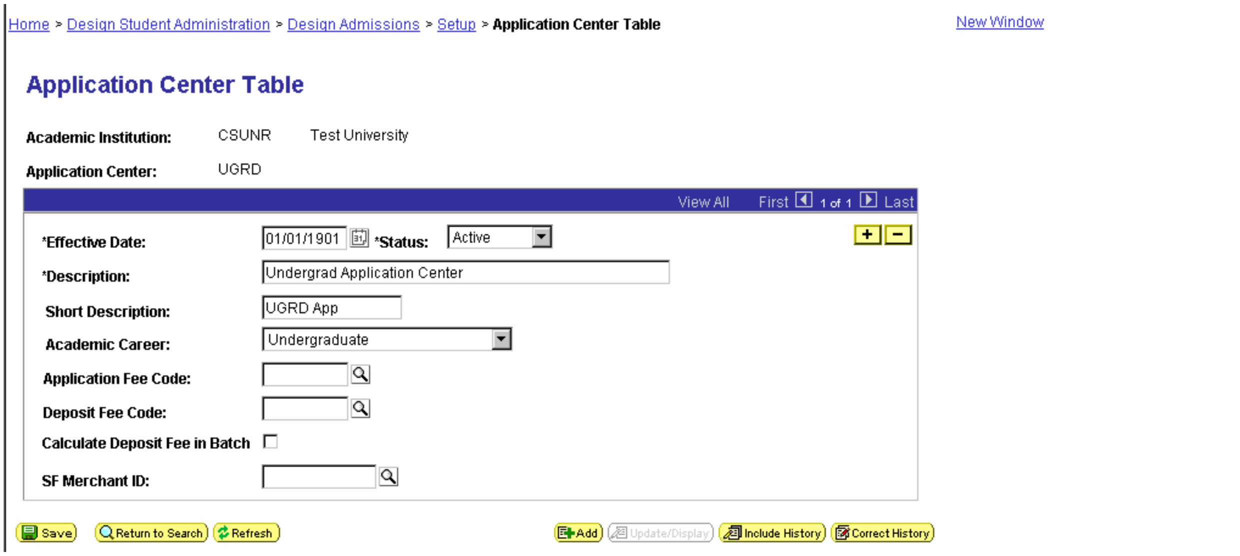
e) A full-time permanent or probationary employee enrolled for a single specific quarter or semester term who is not a degree candidate with continuing student status.

f) A student participation in the "Sixty Years of Age or Older" program who is enrolled for a single specific quarter or semester term who is not a degree candidate with continuing student status.

7 = SUMMER EARLY-ENTRANT TRANSITORY POSTBACCALAUREATE/GRADUATE - A student attending state-supported courses the summer prior to matriculation.

1.5 Application Center Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → Application Center Table



Application Centers are places where admissions applications are processed. By defining Application Centers, you can track what office is handling a specific application. This is especially useful if you have decentralized processing for Academic Careers and/or programs.

You can assign applications to Application Centers and link recruiters to Application Centers. This will be helpful later to easily identify the applications and recruiters who belong to a particular admissions office.

1.5.1 Considerations

Academic Career: Select an academic career if this application center is for only one academic career. If you want an application center to be available for all careers, leave this field blank.

Application Fee Code: Application fee codes are defined and setup in Student Financials. Your campus business process determines whether you want to charge an application fee at the time of application entry. If an application fee code is selected then the student cannot be matriculated until the application fee code status of "received" is updated.

Deposit Fee Code: Deposit fees codes on the Application Fees page is defined and setup in Student Financials. If you do not charge deposit fees, leave this field blank.

Calculate Deposit Fee in Batch: Select this check box if you want to allow users to save applications without calculating a deposit fee. When you enter a status of Admitted on the Application Program Data page, the system does not prompt you to calculate the deposit. It will then use the Deposit Fees Calc batch process (SFPBADEP) to calculate the deposit fee. This enables you to automate the deposit fee calculation process.

If the check box is not selected, the system will prompt you to calculate a deposit fee even when you enter a status of Admitted on the Application Program Data page.

SF Merchant ID: select a merchant ID for the application center. The merchant ID is a user-defined element that defines the rules for interfacing with a third-party credit card processor. Define student financials merchant IDs on the SF Merchants page in PeopleSoft Student Financials. Leave this blank if you either do not accept credit cards for application fees or do not process application fees at all.

1.5.2 Recommendations

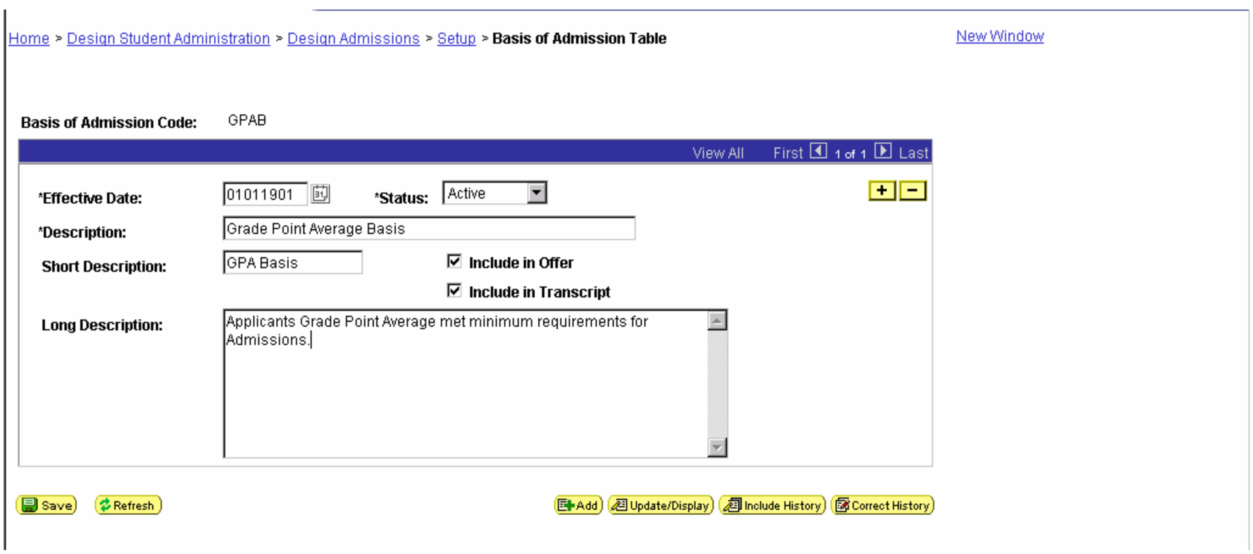
Application centers can be used to control access to applications, i.e. Extended Education can be limited to only accessing their applicants. Your Application Center codes can duplicate your Academic Career codes. Some examples of Application Centers are Graduate, Extended Education, Undergraduate, etc.

The decision to do online or batch process of Application Fees is dependent upon your current business process. Many schools do not utilize this functionality because it requires that every application must be manually updated.

If you are planning on calculating the application fee at the time of the application you would need to consider if you want to do this in "real time" or as a Batch Process. You will need to coordinate with the Student Financial team so that any required setup be completed for calculating an application fee upon saving the application. Calculating application fees in batch creates charges on the student's account. Payments received must be manually entered on the Application Data page.

1.6 Basis of Admissions Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → Basis of Admissions Table



This page allows you to setup the values you wish to track for the basis of admission for applicants and students. You can set up basis of admission codes that represent general admission criteria—such as ACT test score, GPA or interview and then link the code or codes to an individual. You can even print the basis of admission on the admission offer letter or on a student's transcript.

1.6.1 Considerations

Include in Offer: Select this check box to include the code, description, short description, and long description by default on the admission offer letter for any applicant to whom you assign this basis of admission code. When you select this check box, the system automatically selects the **Include in Offer** check box on the Basis of Admission page.

Include in Transcript: Select this check box to include the code and long description by default on the transcript for any student to whom you assign this basis of admission code. When you select this check box, the system automatically selects the **Include in Transcript** check box on the Basis of Admission page

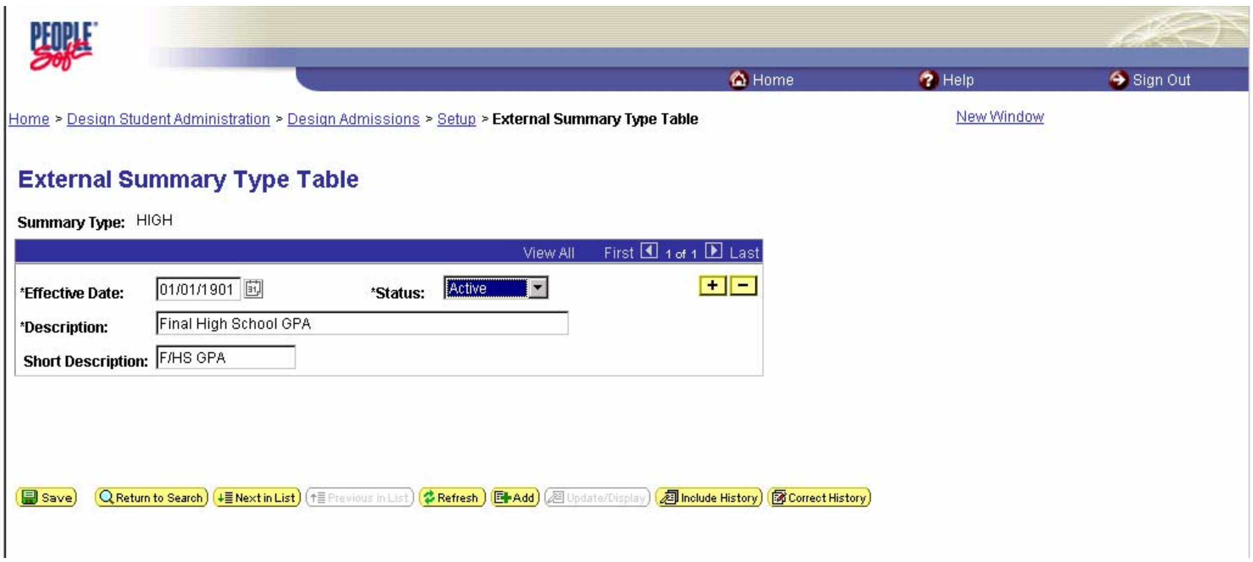
Long description: should clearly state the basis for admission. For example, you could say, "The applicant's composite SAT score exceeded the minimum score required for admission to the program." You can have another code that represents grade point average, and another that represents letters of referral, for example. If you admitted a person based on their SAT score, grade point average, and letters of referral, you could assign all three bases of admission codes to the person

1.6.2 Recommendations

This will be a SOSS owned table with the values from the Chancellor's Office Admission of Basis table and will be populated with the ERS (Enrollment Reporting System) admission basis values. This table is not modifiable by the campus. Any deletions or additions could cause catastrophic errors.

1.7 External Summary Type Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → External Summary Type Table



Use this page to define the types of summary education information that your campus would want to capture for a prospect or applicant.

1.7.1 Considerations

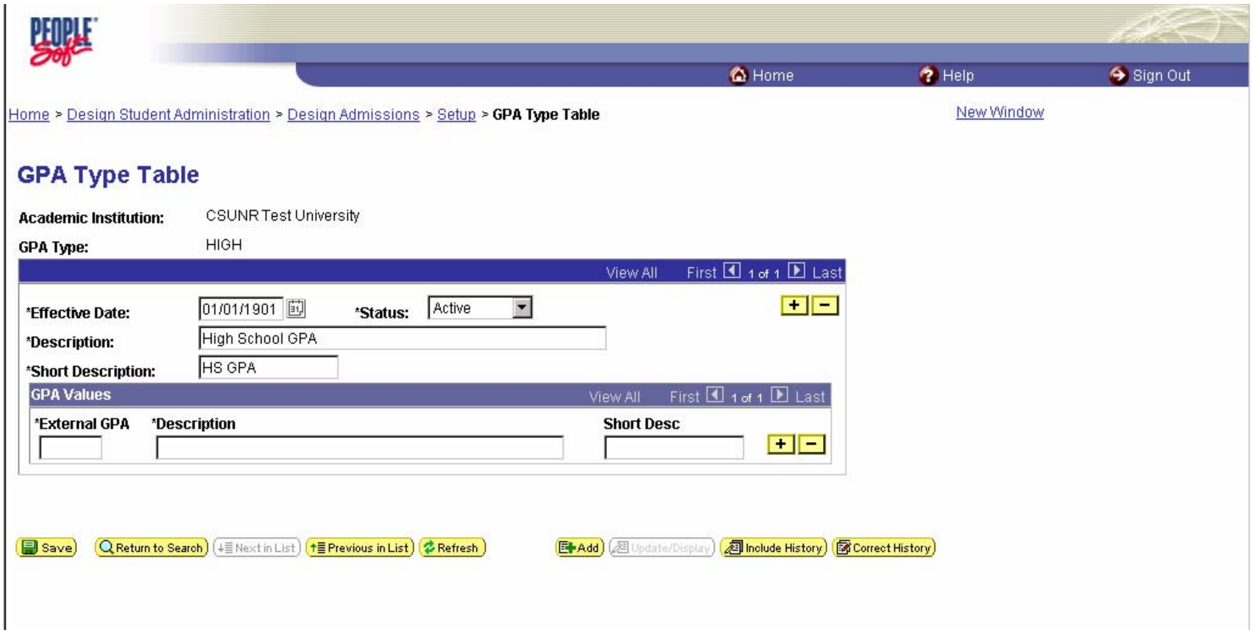
You may want to mirror academic levels on a transcript: High School Grade 9, High School Overall, Undergraduate First Year and Post Baccalaureate.

1.7.2 Recommendations

In order to use the Automatic Processing for Evaluations you will have to setup the SUM Type of "HIGH" to store the High School GPA.

1.8 GPA Type Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → GPA Type Table



This is a two-step process, first you will need to define GPA types and then you will need to set up the conversion calculations.

1.8.1 Considerations

You need to enter your academic institution and the GPA type code that you will be defining, i.e. 4PT, 100PT, etc.

External GPA: Enter the external GPA value for each GPA value.

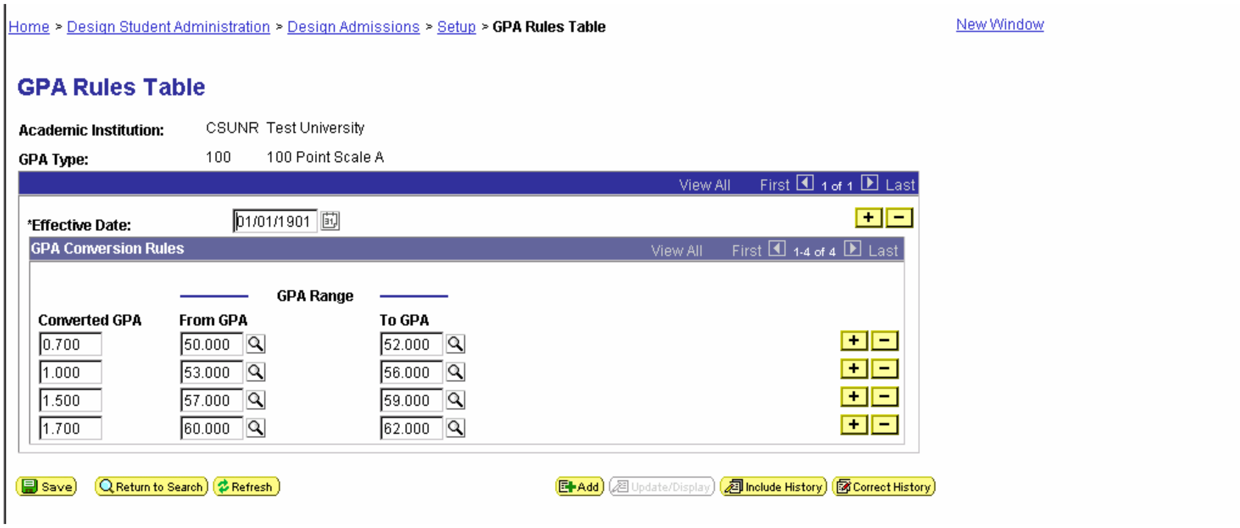
1.8.2 Recommendations

If the outside GPA type has a name that is not self intuitive you can use the GPA values portion of the page to better define the external GPAs that belong to this GPA Type.

In order to use the Automatic Processing for Evaluations you will have to setup the GPA Type of "HIGH" to store the High School GPA.

1.9 GPA Rules Table

Navigation: Home→ Design Student Administration → Design Admissions → Setup → GPA Rules Table



Use the GPA Rules Table page to define your GPA conversion rules.

1.9.1 Considerations

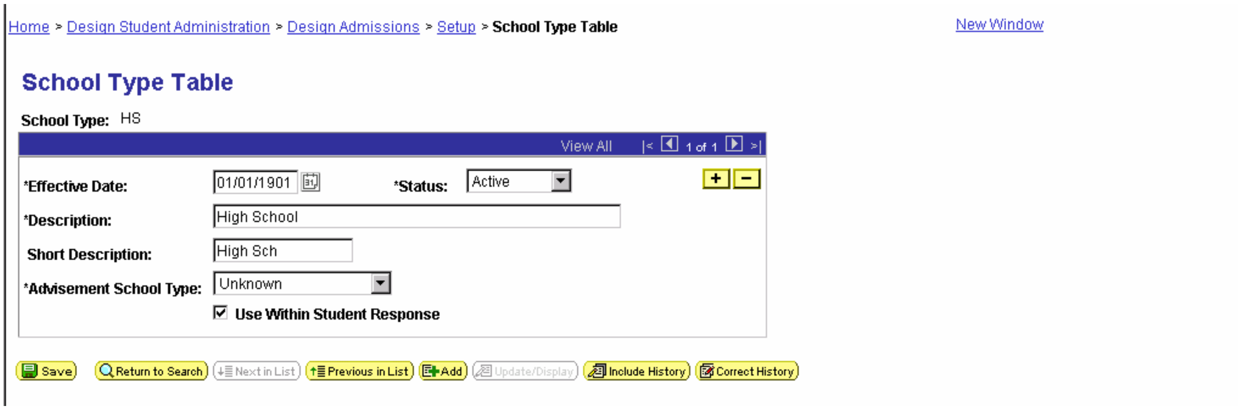
Converted GPA: Enter the converted GPA that applies to the range entered in the FROM GPA and TO GPA fields.

From GPA and To GPA: The next 2 fields are where the numeric value is entered. If you have already defined the GPA values on the GPA Type Table page, you can then prompt for these values. You can still enter values that have not been pre defined. You can add as many converted GPAs as needed for a GPA Type.

1.9.2 Recommendations

1.10 School Type Table

Navigation: Go→ Design Student Administration → Design Admissions → Setup → School Type Table



Use the School Type Table page to set up school types and group external organization material.

1.10.1 Consideration

Advisement School Type: If this is an advisement school, select an advisement school type. Values for this field are provided as translate values. These fields can be edited. . When you are defining a school type code, you must also specify whether this school type can be used with the Student Response feature.

Use Within Student Response: Select this check box to enable student response reasons when defining a school type on the School Type Table page

1.10.2 Recommendations

School types are another way that the system categorizes external organization material. School organizations are those that you'll probably use the most in PeopleSoft Recruiting and Admissions. Assign school types to an organization on the School Data page in the Organization Table component.

School Type will be a SOSS-owned table with the following values:

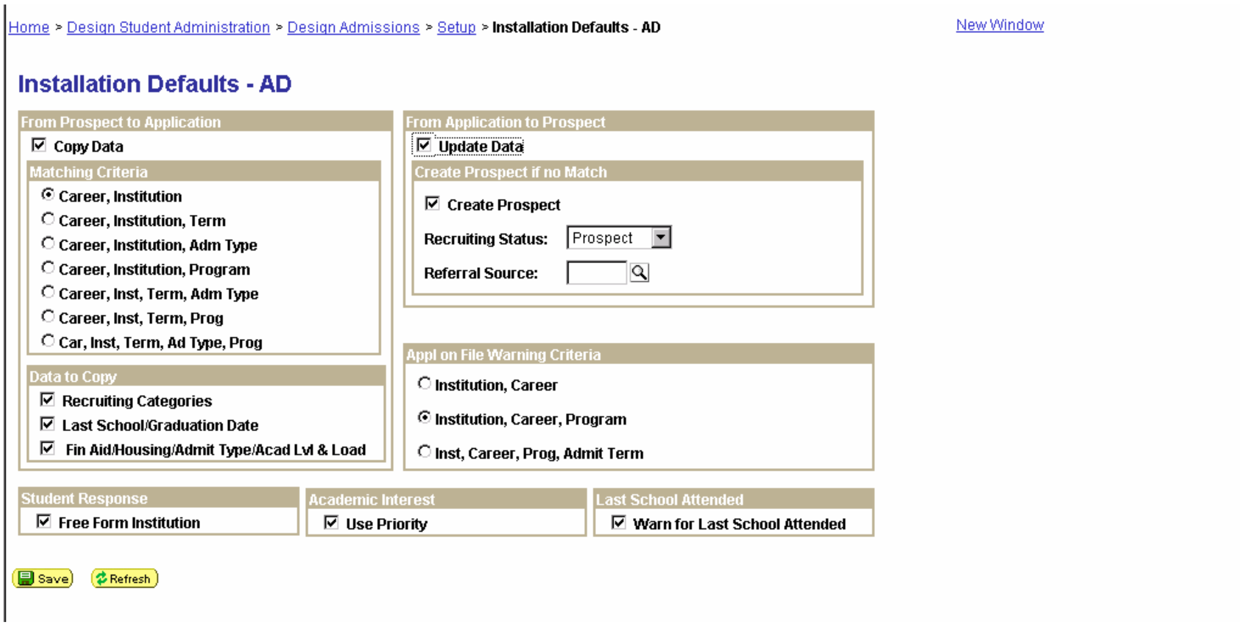
School Type	Description	Short Description	Advisement School Type
CC	Community College	CC	Two Year
COL	College/University	College	Four Year
HS	High School	High Sch	Unknown
UNK	Unknown	Unknown	Unknown

The campus can add their own values but must not modify any of the SOSS owned values.

2.0 Installation Defaults

2.1 Installation Defaults -AD

Navigation: Home→ Design Student Administration → Design Admissions → Setup → Installation Defaults



This setup page directly impacts both Admissions and Recruitment. Installation Defaults allows you the options of what information can be copied between the prospect and application data tables. These options need to be discussed by the Recruitment & Admissions departments to better utilize the flow of information and eliminate duplicate entry.

Please note that with the CSU customized Mentor interface that was developed by CMS, the CSU Application Installation Defaults page will **not** override the default selection on the Installation Defaults-AD page

2.1.1 From Prospect to Application

If you want prospect information copied to the application record, select the Copy Data option in the From Prospect to Application group box. By selecting this option you can save data entry time. Do not select Copy Data if you don't want prospect information to carry over to a new application.

Considerations

If you selected the **Copy Data** check box, choose the criteria that the system uses to update an application with prospect information. Choose which data elements in your operator defaults must match those of the prospect record. When you add a new application, the system compares your operator defaults to the criteria that you select here. For example, if you select **Career, Institution,** and **Admit Type,** the systems compares the prospect's career, institution, and admit type to your operator defaults. If it finds a match, the system copies the prospect data into the new application.

The above information is carried over to the application, but if you later edit the application, there will not be a change in the prospect record. If you later edit the prospect record, the application will not be changed. If you do not select Copy Data, the options under Matching Criteria and Data to Copy do not affect anything in the system.

If the **Copy Data** box is selected, specify those data categories that you want carried to the application from the prospect record. You can choose one or more of the following three categories:

- Recruiting categories
- Last school attended and graduation date
- Financial aid, housing, admit type, and academic level and load

The system updates the application with the selected data at the matching criteria level. Note that only those matching Recruiting Categories flagged Move to Application on the Prospect Recruiting Data page are copied to the application record.

Recommendations

You will need to discuss these setup options with the Recruitment department at your campus. These are business processes that will affect Admissions reporting. User defaults must be predefined in order for this functionality to work.

2.1.2 From Applicant to Prospect

If a prospect sends in an application(s) you can have the prospect record be updated with the application number for the career and program to which this application pertains. Or, if the application is for a program not included on the prospect record, then the new program information can be added to the existing prospect record, including the career and program to which the application pertains.

You may receive applications from people for whom you have no existing prospect records. For historical purposes, you may wish to have a prospect record for all applications stored in your system. The Student Administration system allows you to create prospect records “after the fact” for all such applications.

Considerations

If a prospect record exists for an applicant from whom you receive an application and you want the application number to be copied from the application into the prospect record, select **Update Data** in the From Application to Prospect group box. The application number appears on the Prospect Program Data page in the Prospect Data component. On the Prospect Career Data page in the Prospect Data component group, the Applied field will be selected. Also, on the Prospect School/Region page, the Last School Attended, Graduation Date and Region fields are filled in if they had no data in them on the prospect record.

If the prospect record does not include the program being applied to, the system adds that program to the prospect record and updates it with the application information.

If a prospect record does not exist at all for an applicant from whom you receive an application and you want a prospect record to be created, select **Update Data** as well as **Create Prospect** in the Create Prospect if no Match group box. Upon saving a new application, a prospect record is automatically created. The new record contains data from the application such as Institution, Admit Term, Admit Type, Application Date, and so on. The application number appears on the Prospect Program Data page in the Prospect Data component group and the Applied field is selected on the Prospect Career Data component in the Prospect Data component group.

If you have selected the Create option, enter what you want the Recruiting Status and Referral Source to be on the new prospect record. Recruiting Status values are delivered with your system as translate values. These translate values can be modified if necessary. Referral Sources are defined in the Referral Source Table. The system only creates a prospect if a recruiting center is defined in your operator defaults.

Recommendations

You will need to discuss these setup options with the Recruitment department at your campus. These are business processes that will affect reporting criteria. User defaults must be predefined in order for this functionality to work.

2.1.3 Application on File Warning Criteria

To avoid entering duplicate applications, specify on the Installation Defaults - AD page at what circumstances you want the system to warn you that a potential duplicate application exists. You may want to be notified when saving an application that an application with the same Institution, Career, Program and Admit Term already exists for this person. You may want to be warned at a higher level, when only the Institution and Career are the same. When the warning message appears, you have the choice to save the application, or return to the application component group without saving.

Considerations

Under the Application on File Warning Msg Matching Criteria group box, select your preference of when you want to be warned that a potential duplicate application exists for a person. Your choices are:

Institution, Career: If an application for this person exists with the same Institution and Career as that you are saving, a warning message appears.

Institution, Career, Program: If an application for this person exists with the same Institution, Career and Programs that you are saving, a warning message appears.

Institution, Career, Program, Admit Term: If an application for this person exists with the same Institution, Career, Program and Admit Term as the application you are saving, a warning message appears.

Recommendations

If the system detects a potential duplicate when you save an application, you get a warning such as the following:

"An application with Career (UGRD), Program (CRED), Admit Term (2017) and Institution (FRESNO) already exists.

If you would like to create a new application with the same Career, Program, Admit Term and Institution push the OK button, otherwise push the Cancel button."

You need to be certain of what level you would want to be alerted to duplicate applications that are on file. Sometimes being too detailed on your choice would produce more manual intervention.

2.1.4 Student Response

The Student Response page captures the reason why an applicant chooses to attend another school. This is important information your campus may want to track and report on. You can choose from a series of pre defined response codes your campus can set up to capture the exact information you want to track or can be used as a free form text.

If you do not choose to use the free form page then when you use the Student Response page, the External Org ID field prompt will only display a list of external organizations whose School Type code has had the Student Response option activated.

It is recommended to activate this option because a student can choose to attend an institution that is not loaded as an external organization in your system.

2.1.5 Academic Interest

Academic Interest allows you to record and view an applicant's academic interest standing level. A student can have biology as their first level academic interest priority and math could be their second level academic interest priority.

Considerations

Capturing this information can help in enrollment management, recruiting efforts, reporting and program evaluation. If you access this check box, the Priority field becomes active on the Academic Interest page

2.1.6 Last School Attended

When Warning for Last School Attended box is checked, a warning message appears, "*Academic history not being updated*", if this information is not entered before the Prospect page is saved. This reminds the end user to update the Education page with the new external organization information.

Considerations

A student may attend several schools in his/her academic career; it can be helpful to know which school was attended most recently.

Recommendations

It is recommend activating the Warning for Last School Attended box so that the last school attended can be recorded in the student's record. This can be helpful information for future recruiting efforts.