



INDIANA UNIVERSITY

Indiana University Graduate CAS Operations Manual

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1.0 Overview

This document outlines key operational items as related to Indiana University Graduate CAS, Liaison and the IU Core team. The information includes campus support and other key operational items related to UNICAS.

2.0 When to Submit a Case to Liaison

Liaison has a help desk system that tracks all issues. To ensure all items are properly tracked and resolved campuses should open tickets through the support form. Using the support form you can submit a case to Liaison. There are many reasons you may contact Liaison using the form site, including:

- Request invitation codes;
- Questions about data appearing in WebAdMIT;
- Confirm an applicant submitted payment;
- Questions about an Application Status;
- Questions about applicant portal functionality; and
- Technical issues with application or WebAdMIT

Link to Form: <https://fs21.formsite.com/riretonliaison-intlcom/uwg2zk46wn/index.html?1568051627440>

*The formsite is a tool designed to be used by the IU Core team and the individual campuses. **This form should not be given out to applicants or recommenders.***

2.1 Invitation Code Request

Invitation codes allow applicants to apply to closed programs at a specific organization.

1. Campus users will go to support [formsite](#), complete and provide relevant details (**cycle, amount of codes, organization and invitation deadline date**) in the description field.
2. Within 2 business days Liaison will produce the invitation code file and send it to the campus user.

3.0 When to Contact the IU Core Team

Any questions related to your specific campus or any internal IU processes can be directed to the IU Core team atgradcas@iu.edu. You may contact the IU core team for many reasons including:

- Questions about program settings
- Questions about internal IU processes and workflow
- Enhancement requests to the applicant, configuration and WebAdMIT portals
- [Request Coupon Codes](#)
- [Approval of new programs](#)

3.1 Enhancement requests

The IU Core team has a process to submit enhancement requests for review by the Liaison product teams. If you have suggestions on how to improve our portals please share these with the IU core team by sending an email to gradcas@iu.edu.

3.2 IU Core Team User Contact Information

For general questions about the IU Graduate CAS contact gradcas@iu.edu

For campus specific questions contact the following:

- Bloomington and regional campus representatives:
Kim Bunch - kbunch@iu.edu
- IUPUI and IUPUC campus representatives:
Monica Henry – mlhenry@iu.edu
- If you have questions about the data loads from WebAdMIT to SIS PeopleSoft, or from SIS PeopleSoft to WebAdMIT contact:
Todd Neal - tneal@iu.edu

3.3 Indiana University WebAdMIT Work Flow

IU campuses should follow the [Indiana University Work Flow document](#). This document was designed to assist in the internal admissions flow of an application.

3.4 Submitting a Program for Approval

Programs open and close throughout a cycle. If you need to have a program approved so it is available to applicants please follow the steps below:

- Create, brand and customize the program within the Configuration Portal
- Once you are satisfied with the program click the “Submit for Review Button”

The screenshot shows the configuration page for a program in the WebAdMIT system. The program is titled "Non-degree Dual Credit Teacher of Biology-Online Sp 20" and is located in Indianapolis, IN. It has a Program ID of 206017 and a Unique ID of 930171019279212009. The status is "Draft" and the start term is "Spring 2020". The deadline is "01/15/2020" and the fee is "\$ 70". The degree is "Non-Degree IU Online" and the career code is "GRAD Online".

OPTION	ENABLED	LAST UPDATED	PREVIEW
Home Page/Branding	Yes	2019-07-11	Preview
Questions	Yes	2019-07-11	Preview
Documents	Yes	2019-07-11	Preview
Recommendations	Yes	2019-08-08	Preview

At the bottom right of the page, there are two buttons: "edit" and "Submit for Review". A red arrow points to the "Submit for Review" button.

- Once a program has been submitted for review email gradcas@iu.edu, and include your campus, to request the program is approved. *Please note, if there are any issues with the program you have submitted for review the program will be reset back to draft status for you to make the edits.*

3.5 Requesting Coupon Codes

IU campuses may request Coupon codes that would cover the majority or part of the application fee. Coupon code requests are submitted to the IU Core team using [this form](#). These codes will be tied to your campus/organization and cannot be used for a program on another campus/organization. You will only be charged for codes used. They will expire at the end of the current CAS cycle. *Please note, each coupon code can only be used once.*

3.6 Deferring an Admissions Decision

Deferring an admissions decision is possible within WebAdMIT, though the administrative management of the applications will leave certain parts of the application blank. As such, it is encouraged to have the applicant reapply for their intended term or program. An invitation code may be used to facilitate the application beyond a deadline or a coupon code may be used to facilitate a fee waiver for this situation.

There are two ways in which you can defer an applicant. You can defer them to another term within the same CAS cycle by updating the local status to “Program/Term Change” and adding the new program/term designation manually (Manual Designation), or you can defer them to a term in the next CAS cycle by updating their Local Status to “Defer - next CAS Cycle”. In order to utilize “Defer – next CAS Cycle” there must be a program (designation) in the next CAS Cycle with the same program code, start term, and start year (+1). Note that for deferred applicants in the new cycle, only the Applicant Header, Contact Information, and Designations panels contain data.

Defer to a future term in the same CAS using Manual Designation – Use Manual Designation when Programs wish to change applicants to a different term or program within the same CAS Cycle and campus. **You must have access to the new program and term (designation) in order to add that designation to the student’s application.** If you do not have access to the new designation, contact your central graduate admissions office or international admissions.

For step by step instructions regarding the above please review the [IU Grad CAS Workflow Document](#).

4.0 When to Contact WebAdMIT Support

Liaison has a support team dedicated to assisting campus users in WebAdMIT. From creating scoring models to resetting passwords you can contact the WebAdMIT support team between the hours of 9am to 8pm ET.

- Technical Issues with the WebAdMIT portal
- Technical issues with APIs, Exports and Lists
- Basic and advanced help with WebAdMIT functionality

4.1 WebAdMIT Support Hours

For questions related to WebAdMIT, the WebAdMIT Support Team is available Monday-Friday from 9am to 8pm ET.

WebAdMIT Support Email: webadmitsupport@liaisonedu.com

WebAdMIT Support Phone: 617-612-2885

4.2 WebAdMIT Help center

Guide	Link
Getting Started Guide	https://help.liaisonedu.com/WebAdMIT_Help_Center/Getting_Started_Guide
WebAdMIT Manual	https://help.liaisonedu.com/WebAdMIT_Help_Center/WebAdMIT_Manual
Configuration Training	https://help.liaisonedu.com/WebAdMIT_Help_Center/Configuration_Portal
Release Notes	https://help.liaisonedu.com/WebAdMIT_Help_Center/Release_Notes
Documentation and Reference Guides	https://help.liaisonedu.com/WebAdMIT_Help_Center/Documents_and_Reference_Guides
WebAdMIT Training	https://help.liaisonedu.com/WebAdMIT_Help_Center/WebAdMIT_Training
Contact Support	https://help.liaisonedu.com/WebAdMIT_Help_Center/Contact_Support/Contact_Support

4.3 Liaison Sprint Release Notes

Release notes provide a summary of enhancements and new features that are made available in the Applicant Portal, Configuration Portal, and/or WebAdMIT, usually on a biweekly basis. You can locate Release Notes under the WebAdMIT Help Center [here](#).

5.0 WebAdMIT and Applicant Portal Scheduled Maintenance Window

In addition to scheduled releases, regular maintenance for the following applicant- and admissions-facing systems is every Sunday from 7 – 10 AM ET:

- Applicant Portal
- Letters by Liaison
- Configuration Portal
- WebAdMIT

Users attempting to access these platforms during the maintenance window will receive a message that the platform is temporarily unavailable.

6.0 Where to Find Indiana University Specific Documents

The IU Core Team maintains an FAQ Webpage as well as a Box site, which includes the latest updates and memos to campuses, Training and Business Process Guides, Technical Documentation and Enhancement Requests.

Please visit : [Introduction to IU Graduate CAS FAQ Page](#)

[The Box : Liaison Launch Project](#) ** You must be logged in to an IU server utilizing your IU login, then you should be able to access all documents found within this folder. This is where you will find past listserv announcements and other important documents.

7.0 Applicant Support and Hours

7.1 Applicant Support Contact Information

Applicant Support Email: graduate.indiana@liaisoncas.com

Applicant Support Phone: 617-729-2866

Applicant Support Chat: Live Chat support located in [Applicant Help Center](#)

7.2 Support Hours

Applicant Support hours are Monday through Friday 9:00am- 5:00 PM EST

8.0 UNICAS Finance Procedures

Detailed documentation of the Liaison UNICAS Finance procedures can be found [here](#).

8.1 Applicant Requested Refunds

IU may approve refunds of fees to applicants. Requests for refunds should be submitted via the formsite. The CSM will receive the case and will review, document and submit the request to be processed by Liaison Finance. Requests should include the applicant's name, ID number, date, amount of payment, amount to be refunded, and any additional information available.

If applicants contact Liaison with questions about incorrect payments, the CSM/CSR team should provide this information to Finance by listing the following information on our internal confluence page, including the applicant's name, ID number, date and amount of payment, and any additional support indicating an error (such as a copy of the applicant's bank detail showing erroneous payments) to be further investigated at Liaison. Additional questions can be emailed to billing@liaisonedu.com. If an incorrect charge is confirmed, Liaison will issue a refund.

8.2 Applicant Chargeback or Fraudulent Charges

Chargebacks are credit card payments made by applicants which have been disputed by their credit card company or bank. These are most often payments for application fees and coursework entry fees. When a charge is disputed, the payment is blocked from being collected by Liaison. Before an applicant's application may proceed, this payment issue needs to be resolved or repaid. Applicants who have an account on hold for bad payments are still responsible for those fees in order to make additional accounts and/or apply in future application cycles with IU. Note: chargebacks are typically tracked for three cycles.

Notice of chargebacks by applicants are received by Liaison from the applicant's bank or credit card issuer. Liaison Finance will review all applicant chargeback information received. If the chargeback is determined to be for a correct application fee, Liaison will have the applicant put "on hold" so their application will not move forward until payment is received.

Liaison will provide the chargeback details to the Liaison CSM (including applicant name, ID number, and amount) who will communicate to the applicant that payment is needed by money order or cashier's check made out to Liaison International LLC referencing their name, CAS ID, and IU.

When payment is received, Liaison will remove the applicant's account from hold, and the application process can move forward. Liaison will provide a monthly report of chargeback details.

8.3 Foreign Applicant Payments Rejected

When an applicant reaches out to the CSR/CSM team with an international payment issue, Liaison will send an invoice by email through PayPal which the applicant can pay using a PayPal account. Liaison is notified when payment is received, and our customer service staff has the correct designations added to the applicant's records. Payment will be processed in the same Indiana University PayPal account as all other transactions.

8.4 Finance Report

The IU core team has the ability to run a finance report from an Association level user account in WebAdMIT. Below is the finance report format:

Report Settings

My report will be named:

Create a report using the report format.

This report will be generated using for my applicant pool.

This template appear on the toolbar.

These settings can be seen by myself and the following work groups

All + /

8.5 Application Fee Waiver Logic

Any applicant who selects “Active Duty”, “Veteran” or “Member of Reserve or National Guard” to the Military Status question will automatically receive a fee waiver granted by the University. There are three other ways to waive a fee described below:

- a. **Coupon Code:** Coupons are application fee discounts that you can use to incentivize applicants to apply. Detailed information on the use of coupon codes can be found [here](#). To request coupon codes please complete this [online form](#).
- b. Set the application fee as \$0 permanently or for a limited amount of time in the configuration portal. *Please note, once a program is live the fee can only be updated by a member of the IU Core team/An Association user.*
- c. Add a custom fee waiver question within your program editor in the configuration portal that when triggered would set the application fee to \$0.

Detailed information and step by step instructions on available fee waiver options can be found [here](#).

9.0 Cycle Dates

The following outlines the open and close dates for each cycle. See below for current cycle dates.

Cycle	Open Date	Close Date	Available terms to Apply
2019-2020	09/03/2019	11/01/2020	Winter 2019, Spring 2020, Summer 2020, Fall 2020
2020-2021	02/05/2020	11/01/2021	Winter 2020, Spring 2021, Summer 2021, Fall 2021

10.0 Technical Information

10.1 Technical Requirements

For information on how to use our platforms and additional troubleshooting techniques please refer to our [Technical Requirements](#) page.

10.2 Single Sign On

Single Sign On (SSO) is available for Indiana University users. With this functionality a user logs in with a single ID and password to gain access to multiple systems at a college. Users will also be required to Duo authenticate. In order to connect via SSO the user must have a user set up in WebAdMIT with the iu.edu domain.

Users who have an account with an alternate email domain will need to log in with their username and password each time they access WebAdMIT. Typically this is just for those that have Association User level access.

10.3 Links to Portals Environments

Environment	Cycle	Portal/WebAdMIT	Link
Production			
	2019/20	Applicant Portal	
	2019/20	Letters by Liaison	https://recommendations.liaisoncas.com/recommendation/ui/login
	2019/20	WebAdMIT (SSO)	https://iugrad.webadmit.org/
	2019/20	WebAdMIT**	https://current.webadmit.org
Sandbox			
	2019/20	Applicant Portal	
	2019/20	Letters by Liaison	https://recommendations.sandbox.liaisoncas.com/recommendation/ui/login
	2019/20	WebAdMIT (SSO)	
	2019/20	WebAdMIT**	https://sandbox.webadmit.org/
Pre-Launch			
	2020/21	Applicant Portal	TBD
	2020/21	Letters by Liaison	https://recommendations.prelaunch.liaisoncas.com/recommendation/ui/login
	2020/21	WebAdMIT (SSO)	https://iugrad-prelaunch.webadmit.org/
	2020/21	WebAdMIT**	https://prelaunch.webadmit.org

****If accessing WebAdMIT using the regular WebAdMIT links you will be asked to enter a username and password each time.**

11.0 Training Materials

All WebAdMIT training materials can be located [here](#). For prerecorded trainings on WebAdMIT and the Configuration portal you can reference the table below. To hear about upcoming webinars and training events join the Liaison training email list by completing the inquiry form found [here](#). All staff should start their training by reading the [Liaison Training Plan](#) and reviewing the [Glossary](#).

Course	Description	Intended Use
WebAdMIT Configuration Portal Training	This course provides an overview of the CAS Configuration tool, allowing you to configure the program(s) your applicants apply to.	This technical course provides the information users need to configure their programs.
WebAdMIT Basic Training	This course provides an overview of the fundamental functionality to get you up and running in WebAdMIT.	This technical course provides the information users need to build admissions workflows.
WebAdMIT Advanced Training	This course builds off of the Basic training and explores the more advanced features in the software, allowing you to maximize use of the product.	This technical course provides additional information on building more complex workflows in WebAdMIT.

12.0 Indiana University Graduate CAS – Liaison Team

Below explains the Liaison team and their respective roles.

Role	Title	Name	Email
Client Success Manager**	Client Success Manager	Rebecca Barry	rbarry@liaisonedu.com
Client Delivery Manager	Client Delivery Manager	Jill Skrzyniarz	jskrzyniarz@liaisonedu.com
Account Manager**	Director, Account Management	Mark Chalmers	mchalmers@liaisonedu.com

****Primary Contact**

12.1 Client Success Manager, Rebecca Barry

1. Day to Day operations
2. Salesforce tickets updates
3. Applicant Instructions

12.2 Client Delivery Manager, Jill Skrzyniarz

1. Cycle Rollover Activities and planning
2. Design Documents for client sponsored product development
3. Timeline for deliverables, testing and remediation

12.3 Account Manager, Mark Chalmers

1. Point of escalation for all development and rollover activities