WebAdMIT Workflow: The Basics

Indiana University Graduate CAS
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)
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”.

2. **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.

3. **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!

<table>
<thead>
<tr>
<th>Year</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>2019</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2020</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2021</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2022</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
</tbody>
</table>

*2019 - 2020 Cycle*

<table>
<thead>
<tr>
<th>Year</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2020</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2021</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2022</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
</tbody>
</table>

*2020 - 2021 Cycle*

<table>
<thead>
<tr>
<th>Year</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2020</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2021</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
<tr>
<td>2022</td>
<td>Winter</td>
<td>Spring</td>
<td>Summer</td>
<td>Fall</td>
</tr>
</tbody>
</table>

*2021 - 2022 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:

1. 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

1. **In Progress**

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

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

### Designations by Local Status

- None
- In-progress Outreach #1
- TEST - App Ready for Review
- App Ready for Review
- Missing Requirements
- Missing Transcripts
- TEST - Missing Transcripts
- To Be Interviewed
- Missing Behavioral Document
- Ready for Committee
- Deferred-Next CAS Cycle
- Program/Term Change
- Recommend for Admission
- Recommend for Admission-Term Started
- Deny
- Applicant Withdrawn
- Return to Department
- Grad Office Admit-GINT
- Final Grad Admit
- Final Grad Conditional Admit
- Final GINT Conditional Admit
- Final GINT Admit
- Application Ready for Review
- Total

**Green = Program Admissions Offices**

**Red = Central Admissions Offices**
Decision Codes

1. You do not directly place a Decision Code – you “Take Action” by assigning a Local Status

2. 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.
The Applicant Page (or eDoc):

- 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)

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

4. 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
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. **Review the changes - this action cannot be undone in batch!**
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
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.

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.
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. We recommend applicants complete a new designation (Q4), because only limited application data will be available if you utilize #3 or #4.

3. Defer to another term within the same CAS cycle - update the local status to “Program/Term Change” and add the new program/term designation manually using Manual Designation (next slide).

4. Defer to a same term in the next CAS cycle - 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. *If the student is international you MUST notify the Office of International Affairs or there could be major delays in processing VISA documentation.
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.
Work Groups

1. You can only be in 1 Work Group – choose wisely
2. The Work Group title does not always reflect your title
Request Access

1. Identify your Work Group

2. Complete the required FERPA tutorial and sign the Acceptable Use Agreement – if needed.

   - 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
   - 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

   - 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 recording of this Webinar on *The Basics*.


3. IU Graduate CAS FAQ Page for Faculty and Staff - https://graduate.iupui.edu/faculty-staff/cas.html


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:

Monica Henry - mlhenry@iu.edu
Katina Reedy - reedyk@iu.edu
Amanda Holder - amholde@iupui.edu