Admissions Configuration Guide

Release 2.4

May 2006

Table of Contents

1.877.535.0222

www.jenzabar.net

Admissions Configuration Guide Overview

The Admissions module has many items that must be configured prior to using the software:

- Common Tables (Division, Relationship, Attitude, Attribute, Year, Term, Degree, Location, Building, Room, Concentration, Certification, and Honors)
- Candidacy Types
- Stages
- Source Types and Source Codes
- Tests and Test Elements
- Requirements
- Programs
- Departments
- Payment Types
- Counselor Responsible
- Recruitment Territories
- Visit Types
- Travel Types
- Notepad
- Admissions Organization Tracking
- Priorities

In addition, configuration worksheets are available to aid you in making decisions to meet your organization's particular needs. The data provided on your worksheets will be entered into your database via the Administration menu (File, Admin) of the Admissions module.

Admissions Configure Function Window

AD | File | Admin | Task | Configure Admissions | Configuration

This window is used to configure the Admissions module in regard to general configuration, Program Control configuration, and Territory Control configuration. (See table below for values.)

Module

Function

Configuration Value

Function	Characteristic	Description	Status	Value
CONFIG	**CANDGRADYEAR**	**Candidate Grad Year Configuration**		**Click Here**
	PROGCNTRLOPER	**Program Control Operations**		**Y/N**
	STAGEHISTORYDEL	**Stage History Deletion Authorized User Group**		**Click Here**
	TERRITORYOPER	**Territory Operations**		**Y/N**
CFGPGMCTL	**AUTOACCEPT**	**Auto Acceptance**		**Y/N**
	PROGCNTRL	**Program Control**		**Y/N**
CFGTERRITORY	**ALLOWALPHARANGE**	**Allow Alpha Range**		**Y/N**
	ALLOWZIPRANGE	**Allow ZIP Range**		**Y/N**
	DFTCOUNSELOR	**Default Counselor**		**<ABC>**
	TERRITORYCONFIG	**Territory Configuration ('E'asy or 'C'omplex)**		**E/C**

Program Configuration

NOTE 1: Program Configuration must be defined and set up **before** you set up Program Control.

NOTE 2: Program Configuration cannot distinguish between different candidacy types (freshman, transfer, etc.), so the requirement list should have all requirements for every possible candidacy type. However, customizing a list is possible once it is attached to a candidacy.

Along with Program Control, Program Configuration allows you to:

- Set a maximum number of places available in particular programs and have the system limit the number of students enrolled accordingly.
- Manage wait lists automatically for programs that are full.
- Set percentages by which you can over-enroll students for up to 18 months prior to the start of a term to allow for attrition.

Program configurations are defined on the Program Configuration window. When you enter values for Program Configuration, the different combinations you define are available for you to select from a drop-down list when you are entering candidacy information.

Program Configuration contains default values that can be applied to every year and term. Year/Term Program Control applies to a particular year and term. Different controls can be set up depending on the program, division, location, candidacy type, load, and department. For a particular term in which you want to use values different from the defaults, you can define customized controls. Different controls can be set up depending on the year, term, program, division, location, candidacy type, and load. Unless there are values that you wish to implement for a specific term and year, you can use the default values in Program Configuration, which eliminates setup time and data entry.

Adding a Program Configuration

1. **Open the Program Configuration window (AD, Task, Programs, Program Configuration).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Choose from the drop-down lists the appropriate values for the new program.**
4. **If you want to enter default percentages and determine whether to use program control and automatic acceptance, highlight the row and choose Change Program Configuration from the right-click menu or Options menu.**
5. **The Change Program Configuration window opens.**
6. **Select or clear the check boxes depending on whether you want to use Program Control and/or Automatic Acceptance.**
7. **Enter the default percentages for the program.**
8. **Click OK.**

Changing Program Configuration

1. **Open the Program Configuration window (AD, Task, Programs, Program Configuration).**
2. **Highlight the appropriate row to edit.**

3. **Choose Change Program Configuration from the right-click menu or Options menu.**
4. **The Change Program Configuration window opens.**
5. **You can determine whether to use Program Control and/or Automatic Acceptance.**
6. **You can change the default percentages for a program.**
7. **Click OK.**

Program Control

NOTE: Program Configuration must be defined and set up **before** you set up Program Control.

Along with Program Configuration, Program Control allows you to:

- Set a maximum number of places available in particular programs and have the system limit the number of students enrolled accordingly.
- Manage wait lists automatically for programs that are full.
- Set percentages by which you can over-enroll students for up to 18 months prior to the start of a term to allow for attrition.

Program Control, if used, implements an effective enrollment management principle by keeping track of the number of students who can be accepted into a program based on the pre-determined maximum number of available spaces. It also acts as a "manager" of wait lists for any programs that have reached their accept level cutoff.

NOTE: The accept level cutoffs can be assigned a number high enough to prevent the creation of a wait list.

Program Control allows the setup of <u>extraordinary</u> percentages for overbooking a program up to 18 months prior to the start of the term. This feature is very helpful in preventing under-enrollment. Some organizations may not maintain enrollment cutoff levels and/or wait lists due to space availability. In this case, Program Control has reports available to indicate enrollment levels and provide important statistics for organizational research. The printing of Program Control provides a summary of all programs for any given year, term, division, department, and location.

TIP: Program Control is configurable. A simple **Yes/No** column in the Admissions Configuration Control table will turn the Program Control **on** or **off**. If you are unsure as to whether or not you want to implement this feature, it can always be turned on <u>after</u> installation.

Program Control allows you to automatically assign one action list to a candidacy. The action list is attached when the candidacy moves into a particular stage that you designate. You can assign different action lists depending on location, department, and division.

In order to use the automatic wait list function, you must use Program Control. If you decide to use Program Control but do not want to use automatic wait list management, you can simply set the default accept level cutoffs high enough so that a wait list will not be created. Your organization may decide not to use Program Control if you do not have to worry about over-enrolling and if you do not maintain a wait list based on enrollment. Even if your organization does not want to use enrollment cutoff levels and/or wait lists, you may want to use Program Control anyway. It has reports available to document your enrollment levels and provide statistics for organizational research.

The over-enrollment feature is very helpful in maintaining full enrollment. Some of the students you accepted for a program 18 months before the start of the semester or term may withdraw before the term begins. If you have over-accepted students, you should not have to worry about under-enrollment. You typically set different over-enrollment percentages for each month, with the last month down to 100% enrollment. You can set up different over-enrollment percentages for each program individually.

Configuring the Admissions Module for Program Control

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **PROGCNTROL**
   Description: **Program Control**

3. **In the Value column, enter Y for Program Control.**

Configuring the Admissions Module for Automatic Acceptance

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **AUTOACCEPT**
   Description: **Auto Acceptance**

3. **In the Value column, enter Y for Automatic Acceptance.**

Setting Up Default Percentages

1. **Open the Program Configuration window (AD, Task, Programs, Program Configuration).**
2. **Highlight the appropriate row.**
3. **Choose Change Program Configuration from the right-click menu or Options menu.**
4. **The Change Program Configuration window opens.**
5. **Enter the default percentages.**
6. **Click OK.**

Territory Control

NOTE: If you are going to manually assign candidates to admissions counselors, you do not need to configure recruitment territories.

TIP: Territory Control is configurable. A simple **Yes/No** column in the Admissions Configuration Control table will turn the Territory Control **on** or **off**. If you are unsure as to whether you want to implement this feature, it can always be turned on <u>after</u> installation.

Territory Configuration allows the Admissions Office to assign a default counselor to a candidate based on the following categories:

- Alphabet
- Candidate Type
- Country
- County
- Organization
- Program
- State
- ZIP
- Division
- Location

Each of these categories (or "funnels") can be associated with an identifying code that links the territory type with a counselor.

⇨ For example, on the **Territory by State** configuration, there might be an entry that indicates all candidates from the state of VA are automatically assigned to Joe Counselor.

You must first decide the territory types you will use. You may use as many as you need. Following are some examples of how you can use the territory types:

⇨ Assign all the candidates whose last names begin with A-F to one counselor, G-R to another, and S-Z to a third.

⇨ Assign counselors on the basis of geography: country, state, county, and/or ZIP Code range.

⇨ Assign counselors according to the division or program the candidates are interested in.

⇨ Assign particular counselors to handle all the candidates from particular high schools or other organizations.

⇨ Assign counselors depending on whether the candidate will be a freshman, transfer student, or graduate student using candidacy type.

⇨ Use a combination of these methods.

Territory Configuration (Complex)

Complex Territory Configuration allows for a choice to go to any of the next chronologically available territories. In other words, the **Edit Territory/Alphabet** window would include an additional column called **Next Level**. Your choices are to assign a counselor to a territory value OR go to the next level indicated in the **Next Level** column.

⇨ For example, the system receives a message to assign a counselor by the *ALPHA ranking.

The **Edit Territory/Alphabet** window indicates that candidates with a last name beginning with the letter **S** are to go to the next level which is *ZIP (ZIP Code).

Therefore, the system will try to assign a counselor to Anne Smith using the *ALPHA level. Since there is no counselor default, it goes to the next level and assigns a counselor using the *ZIP configuration.

Territory Configuration (Easy)

Easy Territory Configuration assumes that if your office does not assign a counselor to a value, it will "funnel" to the next level in the ranking order your office has set up in the Edit Territory Rank window.

If **Easy** is selected, your choices are to assign a counselor to a territory value OR the system will automatically go on to the next chronological ranked territory. The **Edit Territory/Alphabet** window will only ask for the letter in the alphabet and the counselor assigned to the letter if the configuration is set to **Easy**. If the **Counselor** column is left blank for a letter, then the Territory Configuration will look at the ranking to determine the next level.

⇨ For example, the system receives a message to assign a counselor by the *ALPHA ranking.

The **Edit Territory/Alphabet** window indicates that candidates with a last name beginning with the letter **S** have a default counselor of Joe Wise.

Therefore, the system will assign the counselor Joe Wise to Anne Smith.

Territory Ranking

The system can perform multi-level sorts of territory types or a "funnel" to determine how to assign a counselor to a candidate. You will need to rank the order in which you want the system to perform the sort. Even if you choose to use only one territory type, you still need to assign ranks. You can tell the system to ignore a territory type by assigning it a rank of "0". For all the territory types you want to use, you need to assign a rank, starting with 1.

Recruitment territory ranks are defined on the Edit Territory Rank window.

Configuring the Admissions Module for Easy or Complex Territory Configuration

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **TERRITORYCONFIG**
   Description: **Territory Configuration ('E'asy or 'C'omplex)**

3. **In the Value column, enter E or C.**

Configuring the Admissions Module to Allow Alphabetic Range Territory Assignment

WARNING: If you are not a system administrator, you may not have security to this window.

NOTE: In order to use the Alphabetic Range Territory Assignment, you must also configure your system to allow Complex Territory Configuration.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **ALLOWALPHARANGE**
   Description: **Allow Alpha Range**

3. **In the Value column, enter Y.**

Configuring Territories by Alphabet Ranges

The Territory by Alphabet configuration must be defined in a specific order of data entry if you want to use a range of letters for assigning Admissions Counselors.

1. **You must first configure the Admissions module to allow Complex territory configuration, configure the Admissions module to allow alphabetic range territory assignment, and set up territory ranks on the Edit Territory Rank window.**
2. **To configure Territory by Alphabet (AD, Admin, Task, Recruitment Territories, By Alphabet), enter alphabet ranges (for example, AC) in the *ALPHA column and assign a counselor to that range.**

   NOTE: The ranges (AG, HP, QZ, for example) have no spaces and no hyphens. AG means all candidates with last names beginning with A, B, C, D, E, F, and G will be assigned to the selected counselor.
3. **Then, when entering a new candidate (AD, Task, Candidates, Candidate/Candidacy Entry), enter information in the tabs in the following order: Name, Address, Biograph, Candidacy, Candidate.**

   NOTE: Information is entered on the Candidacy tab prior to the Candidate tab since the Candidacy Type is part of the configuration in assigning counselors.

Configuring a Default Counselor in the Admissions Module

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **DFTCOUNSELOR**
   Description: **Default Counselor**

3. **In the Value column, enter the initials of the counselor designated to be the default counselor.**

Configuring the Admissions Module to Allow ZIP Range Territory Assignment

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **ALLOWZIPRANGE**
   Description: **Allow ZIP Range**

3. **In the Value column, enter Y.**

Web Configuration

Online Application for Admission

Together with CAMPUSWEB, the Admissions module allows potential candidates to apply/inquire online for admission to your school. In addition to submitting the application via the Web, the potential candidate can also print and mail a hard copy of the application to the Admissions Office. Credit cards and e-checks can be used for application fee payment.

The Internet Configuration window allows the school administrator to adjust online processing options, to configure the appearance of the online application, and to set default values.

The EX Web Process Online Submissions window allows you (or a designated person in the Admissions Office) to view each application submitted via the Web and/or to initiate processing of the online application into the database.

The EX Web View Processed Applications and Inquiries window allows you to view applications that have already been processed into the database.

Configuring the Admissions Module to Accept Online Applications

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Internet Configuration window (AD, File, Admin, Task, Configure Admissions, Internet Configuration).**
2. **The database column name and description are indicated. In the Value column, enter the appropriate value as it relates to your organization.**
3. **Save.**

Admissions Tables

Candidacy Type

The candidacy type is a definition for a type of student (e.g., freshman, transfer, non-matriculated, etc.). It is also important in defining proper financial aid packaging.

The candidacy type codes are defined on the Candidacy Type Definition window, consist of one alphanumeric character, and should relate to the manner in which the Registrar's Office categorizes students since they will receive enrolled candidate records from the Admissions Office.

Adding a Candidacy Type Definition

1. **Open the Candidacy Type Definition window (AD, File, Admin, Task, Admission Tables, Candidacy Type).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter the new code and description.**
4. **Save.**

Editing a Candidacy Type Definition

1. **Open the Candidacy Type Definition window (AD, File, Admin, Task, Admission Tables, Candidacy Type).**
2. **Highlight the appropriate row to edit.**
3. **Edit the description.**
4. **Save.**

Deleting a Candidacy Type Definition

1. **Open the Candidacy Type Definition window (AD, File, Admin, Task, Admission Tables, Candidacy Type).**
2. **Highlight the appropriate row to delete.**
3. **The following message appears: "You are about to delete this row. Are you sure?" Click Yes or No. If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?" Click Yes or No.**
4. **Save.**

Counselor Responsible

NOTE 1: If you plan to assign territories to specific counselors, you must define counselor responsible codes.

NOTE 2: A default counselor can be specified on the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control). Enter the initials of the default counselor in the **Value** column of the DFTCOUNSELOR characteristic.

The counselor responsible is anyone in your Admissions Office who comes in personal contact with candidates or is responsible for recruitment at your organization. The counselor User ID should be identical to the counselor's login User ID information, and the counselor ID Number should be identical to the counselor's ID Number on the Name Master table.

The counselor User ID and initials are used when defining a candidate to a counselor and entering information in Notepad. Using the counselor ID Number, the Admissions Office can run statistics and reports relating to each specific counselor.

Counselor responsible codes are defined on the Counselor Responsible Definition window.

Configuring a Default Counselor in the Admissions Module

WARNING: If you are not a system administrator, you may not have security to this window.

1. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
2. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **DFTCOUNSELOR**
   Description: **Default Counselor**

3. **In the Value column, enter the initials of the counselor designated to be the default counselor.**

Adding a Counselor Definition

1. **Open the Counselor Responsible Definition window (AD, File, Admin, Task, Admission Tables, Counselor Responsible).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter information. The name will default when the ID Number is entered.**
4. **Save.**

Editing a Counselor Definition

1. **Open the Counselor Responsible Definition window (AD, File, Admin, Task, Admission Tables, Counselor Responsible).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes.**
4. **Save.**

Deleting a Counselor Definition

1. **Open the Counselor Responsible Definition window (AD, File, Admin, Task, Admission Tables, Counselor Responsible).**
2. **Highlight the appropriate row to delete.**
3. **The following message appears: "You are about to delete this row. Are you sure?"**
4. **Click Yes or No. If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"**
5. **Click Yes or No.**
6. **Save.**

Department

Department

NOTE 1: Department codes are independent of program codes.

NOTE 2: You must use department codes if you plan to use Program Control.

Departments refer to different schools of education or groups of related disciplines at your organization. The department codes are defined on the Department Definition window and consist of three alphanumeric characters that define the separate schools or departments at your organization.

Department codes can be beneficial for admissions statistics and/or organizational research.

TIP: Department codes can be used to perform breakdowns on certain groups such as international candidates.

Adding/Editing/Deleting a Department Definition

To add a department definition:

1. **Open the Department Definition window (AD, File, Admin, Task, Admission Tables, Department).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter information. The name will default when the ID Number is entered.**
4. **Save.**

To edit a department definition:

1. **Open the Department Definition window (AD, File, Admin, Task, Admission Tables, Department).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes.**
4. **Save.**

To delete a department definition:

1. **Open Department Definition window (AD, File, Admin, Task, Admission Tables, Department).**
2. **Highlight the appropriate row to delete.**

3. The following message appears: "You are about to delete this row. Are you sure?"
4. Click Yes or No. If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"
5. Click Yes or No.
6. Save.

Honor

Honor Code

This code defines any particular earned or bestowed honor of a candidate.

Adding/Editing/Deleting Honor Definitions

To add an honor definition:

1. Open the Honor Definition window (AD, File, Admin, Task, Admission Tables, Honor).
2. Select Add Row or Insert Row from the right-click menu or the Options menu.
3. Enter new honor code.
4. Enter a description.
5. Save.

To edit an honor definition:

1. Open the Honor Definition window (AD, File, Admin, Task, Admission Tables, Honor).
2. Highlight the appropriate row to edit.
3. Enter the necessary changes (type code and/or description).
4. Save.

To delete an honor definition:

1. Open the Honor Definition window (AD, File, Admin, Task, Admission Tables, Honor).
2. Highlight the appropriate row to delete.
3. Choose Delete Row from the right-click menu or Options menu.

   NOTE: There is no confirm deletion message.

4. Save.

Payment Type

Payment Type

NOTE 1: The Payment Type Definition table has no direct interface with the Business Office module. It is solely designed to assist the Admissions Office with tracking money that is received by them.

NOTE 2: If you only want to track that a payment for an application fee or tuition deposit was received, you can do this by setting up a requirement. In this case, you do not need to define payment types.

Payment types can be used to identify whether a fee was paid by cash, check, or credit card and can help to track money received by your office. The payment type code is defined on the Payment Type Definition window and consists of five alphanumeric characters that define the different possible methods of payment your organization accepts as valid forms of payment for an application fee and/or deposit.

Adding/Editing/Deleting Payment Type Definitions

To add a payment type definition:

1. **Open the Payment Type Definition window (AD, File, Admin, Task, Admission Tables, Payment Type).**
2. **Select Add Row or Insert Row from the right-click menu or the Options menu.**
3. **Enter new payment type code.**
4. **Enter a description.**
5. **Save.**

To edit a payment type definition:

1. **Open the Payment Type Definition window (AD, File, Admin, Task, Admission Tables, Payment Type).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes (type code and/or description).**
4. **Save.**

To delete a payment type definition:

1. **Open the Payment Type Definition window (AD, File, Admin, Task, Admission Tables, Payment Type).**
2. **Highlight the appropriate row to delete.**
3. **Choose Delete Row from the right-click menu or Options menu.**

   NOTE: There is no confirm deletion message.

4. **Save.**

Priority

Priority

The priority code is defined on the Priority Definition window and is used to designate the important of mailing or recruiting at a particular organization.

There are three types of priorities: mailing priority, visit priority, and a user-definable priority. The **Mailing** and **Visit** priority columns allow you to determine whether an organization receives a high, medium, or low mailing or visit priority. The **Other** priority column allows you to determine another type of priority and rate it in the same way as the visit and mailing priorities.

⇨ For example, if a large percentage of candidates generally apply from West Coast High School, you may want to assign a high priority code for a mailing to them. These priority codes allow for ease in the selection criteria for mailings or reports of high schools and colleges.

Adding/Editing/Deleting Priority Definitions

To add a priority definition:

1. **Open the Priority Definition window (AD, File, Admin, Task, Admission Tables, Priority).**
2. **Select Add Row or Insert Row from the right-click menu or the Options menu.**
3. **Enter new priority code.**
4. **Enter a description.**
5. **Save.**

To edit a priority definition:

1. **Open the Priority Definition window (AD, File, Admin, Task, Admission Tables, Priority).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes (type code and/or description).**
4. **Save.**

To delete a priority definition:

1. **Open the Priority Definition window (AD, File, Admin, Task, Admission Tables, Priority).**
2. **Highlight the appropriate row to delete.**
3. **Choose Delete Row from the right-click menu or Options menu.**

   NOTE: There is no confirm deletion message.

4. **Save.**

Program Definition

Program

NOTE: The programs you define for Admissions are separate from programs defined in the Major/Minor Definition table in Registration. This allows Admissions more flexibility than Registration in defining programs. For example, your Admissions Office might admit students into the pre-med program; but once the students enroll, the Registrar might assign them to the biology program.

Programs refer to the majors, such as English or Nursing, that are offered at your organization. Each program can have its own list of requirements for admission.

The program codes are defined on the Program Definition window and describe a particular program, major, or minor that is offered at your organization (e.g., Biology, Business Administration, Education, Nursing, Political Science, etc.). Also, each program can define a list of admission requirements.

Requirements

Requirements

Departments, programs, and candidacy types may have specific application requirements that can be grouped together to form a requirements list. Requirements are defined on the Requirement Definition window, and requirements for each candidate can be added, updated, and reviewed from the Maintain Candidacy window (**Requirements** subtab on the **Candidacy** tab).

The Admissions module allows you to:

- Set and track the requirements necessary for an application to be complete.
- Set minimum values for certain requirements that must be met for a candidacy to be accepted (optional).
- Establish requirements for each candidacy.

⇨ For example, a candidate submits an application for admission to the biology program and is also an international student. Therefore, the requirements for admission to the biology program as well as the requirements for an international student would be attached to this candidacy.

Most organizations require that each candidate submit a completed application form, records of standardized tests, and high school records. In addition, some organizations set a minimum GPA or minimum standardized test scores that must be met or can be used as a guideline.

As each item necessary to complete an application is received, the Admissions staff can enter it in the candidacy record. When all of the items have been received and the requirements are complete, the system or a staff member will mark the candidacy's requirements complete.

You can customize both the actual requirements and requirement descriptions for individual candidacies. For instance, you could allow a non-traditional candidate to provide an employer's recommendation instead of a guidance counselor's recommendation. Also, **High School transcript** could be changed to **Newton High School transcript**, and **Guidance recommendation** could be changed to **Guid. Rec. - Bob Johnson**.

NOTE: If you are using Year/Term Program Control that moves candidates through candidacy stages automatically based on the information in the applicant's record, you **must** define requirements unless the only Program Control feature you will use is wait list. If you are using Automatic Acceptance, you **must** define requirements as well as minimums.

If you are not using either automatic function, you do not have to define requirements. However, Jenzabar recommends that you do so, so that the information on the requirements you enter can be used as a guideline when making acceptance decisions. The amount of detail is up to you, but defining minimums can be useful.

⇨ For example, if alumni of your organization complain that the Admissions Office is "letting everybody into the organization," you can run reports at the end of the year to document how many students who were admitted actually met your minimum requirements.

The **Hold/Release** column is available to "hold" a requirement. When one or more requirements are marked with an **H**, the candidacy will move to a held stage. Changing the **H** (hold) to an **R** (release) will allow the candidacy to move out of a held stage.

Requirement Type

Six general categories of requirements for admission to your organization are pre-programmed in the software and are used for checking and processing requirements. You cannot change, add to, or delete any of these categories. To assign specific requirements within these categories, you must define requirement codes.

The requirement type determines where the system looks to see if information has been received and whether minimums have been met. A direct link exists between the GPA requirement type and GPAs entered in Organization Tracking. Direct links also exist between the TEST and TSTEL requirement types and test scores entered in the system. When GPAs and test scores are entered in candidates' rows, the associated requirements are automatically updated and marked **C** (complete). Similarly, there are direct links between the RANK and UNIT requirement types and the rank and unit information in Organization Tracking. You establish the appropriate links between requirements, GPAs, and tests in the Requirement Definition table. Also, you must manually update requirements that use the OTHER requirement type.

The requirement type code defines the different general types of application requirements for admissions at your organization.

⇨ For example, application requirements may include four (4) units of English and two (2) units of math, receipt of a test administration (e.g., ACT, SAT, etc.), and receipt of a test administration with subscores for minimums (e.g., SATM, SATV, etc.)

What Happens When Requirements are not Updated?

- ⇨ A candidacy type of **F** (freshman) was originally entered into the Maintain Candidacy window.
- ⇨ TEAMS University defines that all freshman candidates have a requirements list of **SATL** (SAT total test scores).
- ⇨ Later, it is discovered that the candidate is not a freshman but a transfer student.
- ⇨ TEAMS University defines that all transfer students must have a requirements list of **TRANS** (personal essay, transcript, and a department recommendation).
- ⇨ If we simply change the value in the **Type of Cand**(idate) column from an **F** (freshman) to a **T** (transfer) and never update the new requirements, this particular candidate will never achieve a complete requirements status.

Adding/Editing/Deleting Requirement Definitions

To add a requirement definition:

1. **Open the Requirement Definition window (AD, File, Admin, Task, Admission Tables, Requirements).**
2. **Choose Add Row from the right-click menu or Options menu.**
3. **Enter information. Some of the columns (Test Code, Test Element, Minimum Test Score, Minimum Unit, Minimum Rank Percent, and Minimum GPA) may not be available. Available columns are dependent upon the Type you select.**
4. **Save.**

To edit a requirement definition:

1. **Open the Requirement Definition window (AD, File, Admin, Task, Admission Tables, Requirements).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes.**
4. **Save.**

To delete a requirement definition:

1. **Open the Requirement Definition window (AD, File, Admin, Task, Admission Tables, Requirements).**
2. **Highlight the appropriate row to delete.**
3. **The following message appears: "You are about to delete this row. Are you sure?"**
4. **Click Yes or No.**
5. **If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"**
6. **Click Yes or No.**
7. **Save.**

Requirement List

Requirement Lists

NOTE 1: It is important to understand that each candidacy may have its own customized requirements list. An **unlimited** number of lists can be attached, but only one requirement list can be attached automatically at each stage.

A group of requirements that are necessary for completion of an application at your organization may be defined as a requirements list, which is defined on the Requirement List Definition window. This allows different departments, majors, and/or candidate types to establish their own list of requirements. The lists can be based on any element of a candidacy, such as location, term, division, load, program, or candidacy type.

⇨ For example, your pre-med program may require that each candidate receive a minimum total SAT score of 1200 and a minimum GPA of 3.0. Your education department, on the other hand, may require that all candidates receive a minimum total SAT score of 1000 and a minimum GPA of 3.5. If you attach a different requirement list to each program, every program can be assigned its own set of requirements.

You can also attach a different requirement list to different candidacy types.

⇨ For example, you can define a requirement list for freshmen that consists of a high school transcript, an essay, SAT or ACT results, and class rank.

You can attach an unlimited number of requirement lists to a candidacy as needed.

⇨ For example, an international student who submits an application for admission to the biology program would need to meet the requirements for both the biology program and international students.

You can have one requirement list automatically attached to all candidacies at certain stages. This automatic attachment is set up during configuration of stages. For a list to be attached automatically, the candidacy must touch the stage for that list.

Requirement lists are attached to individual candidacy rows and can be customized.

⇨ For example, all applicants at your organization must submit a recommendation from their guidance counselor. A non-traditional student contacts the Admissions Office to ask if he or she can submit an employer recommendation instead. You can delete the requirement for the guidance recommendation and add a requirement for an employer recommendation.

If a requirement list includes tests, the system will search to see if any test scores for the candidate are already in the system when an application is received. In other words, when test administration results have been received and entered in the system and an application is received at a later date, the test scores will be referenced when the requirements list is attached. If test scores are received with the application, then the test scores should be entered first before working with the requirements list.

NOTE: The test scores are stored in the Candidate table, and all candidacies for that individual will share the same test scores.

Adding/Editing/Deleting Requirement List Definitions

To add a requirement list definition:

1. **Open the Requirement List Definition window (AD, File, Admin, Task, Admission Tables, Requirement List).**
2. **In the top section of the window, choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter the new requirement list code and description.**
4. **If you want to add all the rows in the Available Requirements group box to the requirement list, click the Add All button. If you want to add particular rows, highlight those rows in the Available Requirements group box and click the Add button.**
5. **If, for some reason, you want to remove requirements from the Selected Requirements group box, highlight those rows and click the Remove button. If, for some reason, you want to remove all rows in the Selected Requirements group box, click the Remove All button.**
6. **Save.**

To edit a requirement list definition:

1. **Open the Requirement List Definition window (AD, File, Admin, Task, Admission Tables, Requirement List).**
2. **Highlight the appropriate requirement list row to edit.**
3. **Add rows to the Selected Requirements group box, or remove rows from the Selected Requirements group box.**
4. **Save.**

To delete a requirement list definition:

1. **Open the Requirement List Definition window (AD, File, Admin, Task, Admission Tables, Requirement List).**
2. **Highlight the appropriate requirement list row to delete.**

3. The following message appears: "You are about to delete this row. Are you sure?"
4. Click Yes or No.
5. If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"
6. Click Yes or No.
7. Save.

Editing A Requirement in a Requirement List

1. Open the Requirement List Definition window (AD, File, Admin, Task, Admission Tables, Requirement List).
2. Highlight the appropriate requirement list code. Requirements in the list are populated in the Selected Requirements group box.
3. Click the appropriate requirement in the Selected Requirements group box to edit. The Edit Requirement button becomes available.
4. Click the Edit Requirement button.
5. The Edit Requirement on List window opens.
6. You may or may not be allowed to edit all columns.
7. After editing, click OK.

Editing Requirement Details

NOTE: Only the **Actual Units** column on the **Edit Requirement Details** window is editable; however, that is only available if the Requirement Type is **Unit**.

1. Open the Maintain Candidacy window (AD, Task, Candidates, Candidate/Candidacy Entry).
2. Enter the appropriate ID Number, and press Enter.
3. Click the Candidacy tab.
4. Click the Requirements subtab.
5. Highlight the appropriate row.
6. Right-click (or Options menu), and choose Requirement Details.
7. The Edit Requirement Details window opens.
8. You can view the details or edit the Actual Units column if available.

Scholarship Type

Scholarship Type

This code defines scholarships that are awarded to candidates by the Admissions Office. The code can be up to 20 alphanumeric characters and is defined on the Scholarship Type window. It is associated with a description that can be up to 160 alphanumeric characters.

Adding/Editing/Deleting a Scholarship Type Code and Description

To add a scholarship type code:

1. **Open the Scholarship Type window (AD, File, Admin, Task, Admission Tables, Scholarship Type).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter a scholarship type and description.**
4. **Repeat steps 2-3 for each additional scholarship type code to be added.**
5. **Save.**

To edit a scholarship type code:

1. **Open the Scholarship Type window (AD, File, Admin, Task, Admission Tables, Scholarship Type).**
2. **Highlight the row you want to edit.**
3. **You can only edit the description.**
4. **Save.**

To delete a scholarship type code:

WARNING: You cannot delete a scholarship type code if it is stored in a candidacy row. If this is the case, a foreign key violation error message displays.

1. **Open the Scholarship Type window (AD, File, Admin, Task, Admission Tables, Scholarship Type).**
2. **Select the row to be deleted.**
3. **Choose Delete Row from the right-click menu or Options menu.**
4. **Save.**

Stage Definition

Stage

NOTE 1: Your version of the software may have been delivered with pre-defined stages, but the stages may have been modified to conform to your organization's specific preferences. The stages in the table below have been used as examples in this documentation.

NOTE 2: The value in the **Stage** column on the **Candidacy** tab of the Individual Submission Detail window defaults from the **Value** column for the default_stage on the Internet Configuration window.

One of the key elements in the admissions process is tracking where a candidate stands in the lengthy process between an initial inquiry and acceptance or rejection. The stage refers to the position of the candidate within the admissions process and is defined on the Stage Definition window. You need to define the stages or milestones according to your organization's specific requirements. You can use as many stages as you need.

NOTE: When you are defining your stages, remember that only one requirement list and one action list can be automatically attached at each stage. For instance, if you want several different lists automatically attached in the application stage, you could break the application stage down into three separate stages.

The Admissions module comes with a default stage of **APP** (application). However, below are **examples** of stages that you may use and configure to the requirements of your office. While stages can be user-defined, they <u>must</u> belong to one of the seven defined stage levels.

Contact	Accepted
Inquiry	Deferred to Acceptance
Lead	Deferred from Acceptance
Application	Deposit
Held	Deferred to Deposit
Pending	Deferred from Deposit
Wait list	Decline
Deferred to Application	Enroll
Deferred from Application	Deferred to Enroll
Rejected	Deferred from Enroll

Withdrawn	Cancel

You can use the following automatic features that affect how candidacies move through the stages:

- You can assign a list of requirements that a candidate must meet.
- You can automatically attach an action list of things to do to follow up on the candidacy.
- You can use Year/Term Program Control, which moves candidacies through the stages automatically based on the configuration of stages and the information in the candidacy row. This can include a limit on the number of spaces available in any given program.
- You can use Automatic Acceptance, which will move a candidacy automatically into the accept stage or reject stage based on certain conditions you define.

The system automatically maintains a detailed candidacy history so that you have a row for each stage the candidacy has gone through. For instance, if a candidate makes an inquiry on September 1 and then applies on November 15, the candidacy will have gone through two stages, inquiry and application; the candidacy history will show the dates that the candidacy entered those stages.

If a candidate applies for one term but defers completing the process to a later term, the candidate ends up with two candidacy rows: one in the original term applied for and one in the later term. The first row shows the candidacy's history up to the point where the process was deferred; the second continues from the deferral. The first row becomes a "view only" row that cannot be edited, while the second becomes the active or current candidacy row.

Stage Levels

There are seven pre-defined stage levels, and all stages must exist within one of these allowed levels.

Value	Description

PREAPP	Pre-application
APPLCN	Application
PSTAPP	Post-application
ACCEPT	Accepted
DEFERT	Deferred to other stage level/stage
DEFERF	Deferred from other stage level/stage
PSTACC	Post-accepted

Configuring the Admissions Module to Allow Deletion of Stage History Transaction Rows

WARNING: If you are not a system administrator, you may not have security to this window.

4. **Open the Configure Function window (AD, Admin, Task, Configure Admissions, Territory Control).**
5. **Use the vertical scroll bar to locate the row with the following information:**

   Characteristic: **STAGEHISTORYDEL**
   Description: **Stage History Deletion Authorized User Group**

6. **In the Value column, enter the user group (for example, AD_MANAGER) whose members have the authority to delete rows from the Stage History Transaction Table.**

Adding/Editing/Deleting Stage Definitions

To add a stage definition:

1. **Open the Stage Definition window (AD, File, Admin, Task, Admission Tables, Stage Definition).**
2. **Select Add Row or Insert Row from the right-click menu or the Options menu.**
3. **Enter stage level, stage, description, and order.**
4. **To enter additional details, highlight a row and select Edit Stage Config from the right-click menu or Options menu.**
5. **The Edit Stage Configuration window opens.**
6. **Enter information in the allowed columns.**
7. **Click OK.**
8. **Save.**

To edit a stage definition:

1. **Open the Stage Definition window (AD, File, Admin, Task, Admission Tables, Stage Definition).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes (description and/or stage order).**
4. **To edit additional details, highlight the row and select Edit Stage Config from the right-click menu or Options menu.**
5. **The Edit Stage Configuration window opens.**
6. **Edit information in the allowed columns.**
7. **Click OK.**
8. **Save.**

To delete a stage definition:

1. **Open the Stage Definition window (AD, File, Admin, Task, Admission Tables, Stage Definition).**
2. **Highlight the appropriate row to delete.**
3. **The following message appears: "You are about to delete this row. Are you sure?"**
4. **Click Yes or No.**
5. **If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"**
6. **Click Yes or No.**
7. **Save.**

Test Codes

Test

This term refers to placement or aptitude tests required by the organization and available to all candidates. The test code is defined on the Work with Test Definition window and should be a generally defined test, not the specific parts of a test.

⇨ For example, a test code would be **SAT**, not **SAT Verbal** or **SAT Math**. The test code is the primary definition while the math and verbal portions of the SAT are defined as the elements (components).

With the implementation of the new test elements to the SAT and ACT tests, Jenzabar is shipping appropriate default data for the new tests and test elements. Jenzabar strongly recommends that you use the following test codes for the standardized tests:

Test Code	Description
ACH	Achievement Test
ACT	American College Test (English, Math, Reading, Science Reasoning)

ACT_W	American College Test (English, Math, Reading, Science Reasoning, Writing)
GRE	Graduate Record Exam
LSAT	Law School Applications Test
MCAT	Medical College Applications Test
SAT	Scholastic Achievement Test (Verbal and Math0
SAT05	Scholastic Achievement Test (Critical Reading, Math, Writing)
SUBJ	GRE Subject Test
TOEFL	Test of English as a Foreign Language

Some key features available with maintaining test results are as follows:

- Ability to track an unlimited number of test administrations that a candidate submits to your organization.
- Ability to generate reports of candidate's highest test scores and/or average test scores using the Highest Test Score table. This table is automatically updated by the system–no extra keystroking is required.
- Ability to track a Total/Composite score for each test result that can be manually entered or calculated by the system based on what your organization selects. For example, the SAT total is comprised of the Verbal score plus the Math score; therefore, we would select the Verbal element and the Math element to calculate the total. When received, the ACT composite is a calculated score so the system does not need to calculate it.

A list of standard test codes and descriptions exist in the Admissions module. We recommend that you implement these test codes, but other values can be selected.

Adding/Editing/Deleting a Test Definition

To add a new test definition:

1. **Open the Work with Test Definition window (AD, File, Admin, Task, Admission Tables, Test Codes).**
2. **Choose Add Row or Insert Row from the right-click menu or the Options menu.**
3. **Enter a test code (up to five alphanumeric characters) and a test code description, and select the appropriate score format.**
4. **Save.**
5. **Highlight the newly created row, and choose Edit Test Elements from the right-click menu or the Options menu.**
6. **The Edit Test Elements window opens.**
7. **Choose Add Row or Insert Row from the right-click menu or the Options menu.**

8. Enter appropriate information.
9. Save.

To edit an existing test definition:

1. Open the Work with Test Definition window (AD, File, Admin, Task, Admission Tables, Test Codes).
2. Highlight the appropriate row, and choose Edit Test Elements from the right-click menu or the Options menu.
3. The Edit Test Elements window opens.
4. You can edit all columns except the Element column.
5. Save.

To delete an existing test definition:

1. Open the Work with Test Definition window (AD, File, Admin, Task, Admission Tables, Test Codes).
2. Highlight the row to be deleted.
3. Choose Delete Row from the right-click menu or the Options menu.
4. You will receive the following message: "You are about to delete this row. Are you sure?"
5. If you click the Yes button, the following message appears: "Dependent data related to this item will be deleted and cannot be restored. Continue?"
6. If you click the Yes button, the test code and all related dependent data (actual test scores and requirements using this test code) will be deleted.

Viewing Highest Test Scores for a Candidate

1. Open the Highest Scores window (AD, Task, Candidates, Highest Test Scores).
2. Enter the ID Number of the candidate whose test scores you want to view.
3. Press Enter.
4. All test scores of the candidate will display. The *BEST test element and score will display in a different font color.

Travel Type

Travel Type

NOTE: If you plan to use the Travel Schedule functionality, you must define travel type codes.

WARNING: This code does not refer to the type of visit a candidate makes to your organization.

The travel type defines the type of visit a counselor makes to a candidate or group of candidates.

The travel type code is defined on the Travel Type window and consists of three alphanumeric characters. It is maintained on the Edit Travel Schedule window and can be viewed on the Travel Schedule Inquiry window.

Adding/Editing/Deleting Travel Types

To add a travel type definition:

1. **Open the Travel Type window (AD, File, Admin, Task, Admission Tables, Travel Type).**
2. **Choose Add Row or Insert Row from the right-click menu or Options menu.**
3. **Enter travel type code and description.**
4. **Save.**

To edit a travel type definition:

1. **Open the Travel Type window (AD, File, Admin, Task, Admission Tables, Travel Type).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes.**
4. **Save.**

To delete a travel type definition:

1. **Open the Travel Type window (AD, File, Admin, Task, Admission Tables, Travel Type).**
2. **Highlight the appropriate row to delete.**
3. **The following message appears: "You are about to delete this row. Are you sure?"**
4. **Click Yes or No.**
5. **If you click Yes, you may get the following message: "Dependent data related to this item will be deleted and cannot be restored. Continue?"**
6. **Click Yes or No.**
7. **Save.**

Visit Type

Visit Type

TIP: This can be useful to run statistics, compare the amount of inquiries per visit type, and determine the most effective recruiting style.

The visit type refers to different contacts that the Admissions personnel have with an organization. Visit type codes are required and used to define different types of visits (i.e., high school visits, college fairs, church visits, etc.) for recruitment activities between a member of the Admissions Office and an organization.

Visit types are defined on the Edit Visit Type window and used on the Edit Admission Organization window, where it is a required value. Every visit to an organization that is entered into the system will have a **Visit Type** column to indicate the type of visit for previous or upcoming appointments to the organization.

Adding/Editing/Deleting Visit Type Definitions

To add a visit type definition:

1. **Open the Edit Visit Type window (AD, File, Admin, Task, Admissions Tables, Visit Type).**
2. **Select Add Row or Insert Row from the right-click menu or the Options menu.**
3. **Enter new type code.**
4. **Enter a description.**
5. **Save.**

To edit a visit type definition:

1. **Open the Edit Visit Type window (AD, File, Admin, Task, Admissions Tables, Visit Type).**
2. **Highlight the appropriate row to edit.**
3. **Enter the necessary changes (type code and/or description).**
4. **Save.**

To delete a visit type definition:

1. **Open the Edit Visit Type window (AD, File, Admin, Task, Admissions Tables, Visit Type).**

2. **Highlight the appropriate row to delete.**
3. **Choose Delete Row from the right-click menu or Options menu.**

   NOTE: There is no confirm deletion message.

4. **Save.**

Common Tables

Attribute

Adding/Editing/Deleting Attributes

NOTE: You can also enter and delete information in the Attributes tab of the Maintain Candidacy window (AD, Task, Candidates, Candidate/Candidacy Entry) and the Attributes tab of the Name Entity window (CM, Task, Name, Name Entity).

To add new attributes:

1. **Open the Attributes window (AD, Task, Candidates, Attributes).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Attributes window.**
4. **Choose Insert Row or Add Row from the right-click menu or Options menu.**
5. **Type in or select from the drop-down lists the appropriate information.**
6. **Save.**

To edit an attribute:

1. **Open the Attributes window (AD, Task, Candidates, Attributes).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Attributes window.**
4. **All columns are editable.**
5. **Save.**

To delete an attribute:

1. **Open the Attributes window (AD, Task, Candidates, Attributes).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Attributes window.**
4. **Highlight the row you want to delete, and choose Delete Row from the right-click menu or Options menu.**

5. **Save.**

Relationship

Adding/Editing/Deleting Relationships

NOTE: You can also enter and delete this information in the Relationship tab of the Maintain Candidacy window (AD, Task, Candidates, Candidate/Candidacy Entry), the Relationship tab of the Name Entity window (CM, Task, Name, Name Entity), and the Relationships tab of the Edit Admission Organization window (AD, Task, Organizations, Edit Admission Organization).

To add a new relationship:

1. **Open the Relationships window (AD, Task, Candidates, Relationships).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Relationships window.**
4. **Choose Insert Row or Add Row from the right-click menu or Options menu.**
5. **Type in or select from the drop-down lists the appropriate information.**
6. **Save.**

To edit a relationship:

1. **Open the Relationships window (AD, Task, Candidates, Relationships).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Relationships window.**
4. **All columns are editable.**
5. **Save.**

To delete a relationship:

1. **Open the Relationships window (AD, Task, Candidates, Relationships).**
2. **Right-click in the ID # column, and choose Advanced Search to perform a name search.**
3. **Once names are displayed, double-click on the correct name. It will appear in the Relationships window.**
4. **Highlight the row you want to delete, and choose Delete Row from the right-click menu or Options menu.**
5. **Save.**