

# How to Plan – Quadrant 4 Build

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July 5 – August 2

1. Identify who will configure your Q4(s)
  - a. Make sure your campus trainers have the right individual (and contact info) listed on our master contact list
2. Schedule time for your personal training
  - a. Move through [Stage 1 Training](#) that focuses on the Configuration Portal
3. Schedule time to configure your Q4(s) in the Configuration Portal in July
4. Bookmark [Configuration Portal Best Practices](#) and the [Configuration Portal Help Center](#)
5. Check with your marketing team on image / branding guidelines
  - a. See our IU Branding Guideline document (coming soon)
6. Prep your Home Page intro text in Word (see Best Practices)
  - a. Plain text required - copy and paste to Notepad then to Configuration tool
7. What other application materials do you collect?
  - a. If nothing – then leave all pages unchecked and you just populate your Home page Introduction / welcome.
  - b. Program Level Questions (cannot ask any questions Q1 – Q3 – that list is coming soon)
    - i. You do not need to add terms – this is collected when they select your plan / term on “Add a Program” page
  - c. Recommendations (5 versions to choose from – can mix match too – coming soon)
    - i. IU Graduate CAS will not ask for Recommendations at the CAS level
    - ii. Only Program Evaluations (Recommendations)
  - d. Document uploads (if “required” vs. “optional” they cannot upload a new version after the application has been submitted)
    - i. Prep your instructional text
    - ii. Document Upload options (you select what you want applicants to upload and how many):
      1. CV / Resume
      2. License(s)
      3. Observation Hours
      4. Other
      5. Personal Statement
      6. Publication
      7. Shadowing/ Healthcare Hours
      8. Test Score Report
      9. Work Sample
      10. Writing Sample
      11. Certificates

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- iii. Unofficial Transcripts are collected in Q2 – you cannot also collect them in Q4
- e. IU did not subscribe to the Prerequisite option
8. Submit for approval “Activate”

For help in the Configuration Portal contact the Client Support Specialist Team - available Monday – Friday from 9 AM to 5 PM ET.

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