

IU Graduate CAS Workflow

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IU Graduate CAS Workflow

Overview

In this document, we will discuss the Indiana University Graduate Central Application Service (CAS) workflow design, how to get access to WebAdMIT, deferrals, decision codes/[local statuses](#), how to process applications, how to customize WebAdMIT for your application process, and custom fields.

Required Steps

[Access Required Action Lists](#)
[Process Action Lists Daily](#)
[Update Local Status as application decisions are made](#)
[Communication with your applicants using WebAdMIT email template feature or outside CRM/system](#)

Optional Steps

[Create Optional Requirements](#)
[Create Optional Local Statuses](#)
[Create Optional Lists](#)
[Create Optional Custom Fields](#)
[Create Admissions Committee / Interview Applicant Review Forms](#)
[Implement Assignments](#)

What is WebAdMIT

WebAdMIT is the backend of the Indiana University Graduate CAS and replaces the eApp Administrative Center previously found in one.iu.edu. It is a cloud-based admissions management platform that provides users with tools to streamline their admissions processes. Using WebAdMIT, admissions staff can:

- Manage and communicate with each applicant as they progress through the admissions cycle (individually or in bulk through the List function).
- Manage collective groups of applicants.
- Obtain holistic views of applicant pools.
- Take full advantage of applicant data to make the best admissions decisions.
- Communicate admissions decisions with central graduate admissions offices and offices of international admissions.

Workflow Design

Unlike the current eApp eDoc workflow system in Kuali Rice, workflow in WebAdMIT is built around Local Statuses that are tied to Decision Codes for each applicant. Programs update Local Status utilizing the List function in WebAdMIT. Applications do not route in WebAdMIT, there is no automatic movement. You will pull your daily "Action List" based on the "Local Status" you have assigned an applicant.

Below you will find the Local Status Codes that are pre-set for the Indiana University Graduate CAS that should be applied to your applicants by your admissions team. See the step-by-step instructions under the *Local Statuses and Decision Codes* section of this document.

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

You will notice that when you update your applicants and apply the “Deny” or “Applicant Withdraw before Admissions” Local Status those decisions will write to SIS (via the overnight batch process), where as in the past those eDocs routed through your centralized Graduate Admission Office and the Office of International Admissions. The applications with a Local Status of “Recommend for Admission” will route to your centralized Graduate Admission Office and the Office of International Admissions.

For a visual representation of Indiana University workflow, view the [workflow diagram](#).

Some graduate and professional programs may have the need to develop additional steps to accommodate special circumstances utilizing Local Status codes. Contact your central graduate office to discuss options.

WebAdMIT Application Statuses

Within the Central Application Service (CAS) and WebAdMIT, there are application statuses through which an applicant progresses. Some of these statuses are configured to show less or more information based on best practices. **As mentioned on page 8, you are required to pull a list for those in Received**

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and Complete statuses and process those applications by applying the appropriate Local Status or the Local Status of “Internal Review.”

Full view gives users access to their graduate program’s applications. Full view will give you full access to all information that the applicant has entered. Partial view will give you limited information such as contact information only.

The following table defines the Application Statuses:

Application Status	FULL/Partial
In Progress - Applicants that have designated your program(s) and have NOT submitted and paid for their application	FULL
Received - Applicants that have designated your program(s) and submitted their application. Not all documents have arrived for these applicants and they have not yet been verified (if applicable). For example, a recommendation may be required but the recommender never completed it. The application status will remain as “Received” and will not change to “Complete” even if the program makes an exception.	FULL
Complete - Applicants that have designated your program(s) and submitted their application. 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.	FULL
On Hold - Applicants that are placed on hold by the staff at Liaison. Typically, a special case has caused these applicants an additional review.	Partial
Undelivered - If Liaison staff finds significant mistakes during the verification process, the application will be undelivered back to the applicant with an email explaining what is wrong. The applicant must then correct these errors and re-submit the application to be re-processed.	Partial
Manual - Manual designations allow an applicant to be assigned a new designation within WebAdMIT. In order to see this applicant, the user in WebAdMIT will still need access to their original designation. The applicant will see both their original designation and new designation in the Applicant Portal.	Include

Local Statuses and Decision Codes

Local Statuses allow you to track applicants by Designation (program/plan and term) during each stage of your admissions process. You can think of the Local Status codes as file folders (that are labeled with each step in your admissions process) on your desk. Local Statuses should be matched to Decision Codes. When you change an applicant’s Local Status, WebAdMIT automatically updates the Decision Code. Decision Codes are standard CAS-wide codes used for categorization

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and reporting of applicants. Note that not all Decision Codes write to SIS. See page 3 for a list of Decision Codes connected to CAS-wide Local Status codes.

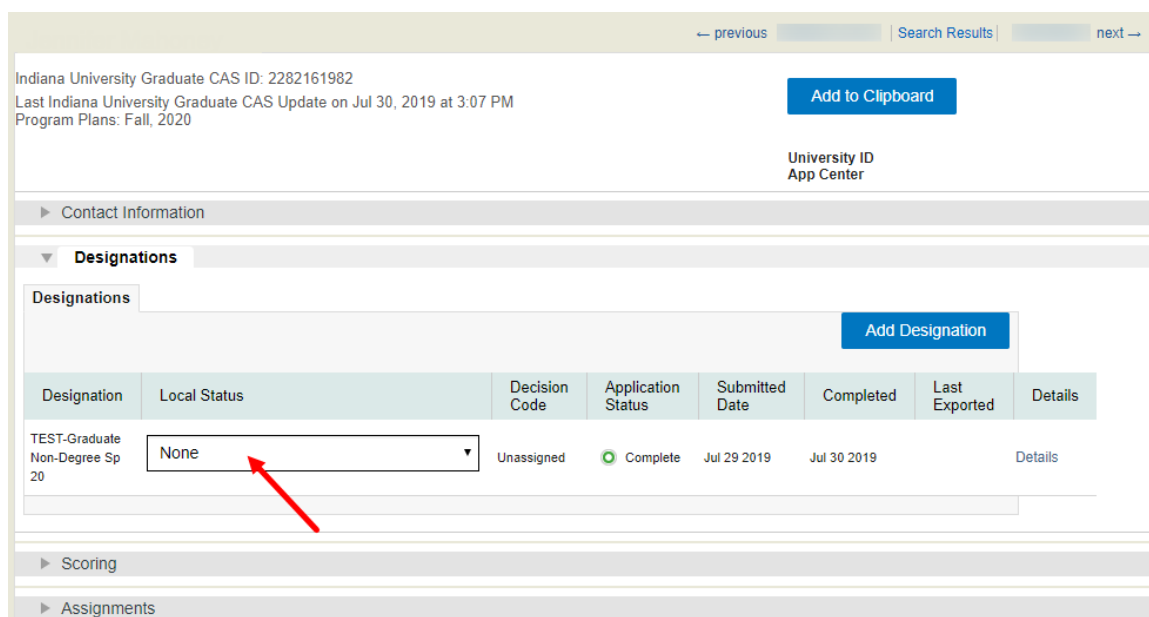
All Local Status and Decision Code changes are recorded under the History panel on each applicant's page. Local Statuses are for internal WebAdMIT use only. Applicants cannot see their Local Status in the Applicant Portal or Decision Codes for the 19-20 CAS cycle.

Changing an Applicant's Local Status

Once Local Statuses have been created, they can be assigned to applicants individually from the Designations panel on the Applicant Details page. They can also be assigned in batch via Lists, Searches, etc. Local Statuses are created by those in the Director of Admissions Work Group.

Updating an Applicant's Local Status Individually

1. Navigate to the *Applicant Details* page.
2. Go to the **Designations** panel.



The screenshot shows the 'Designations' panel for an applicant. It contains a table with the following data:

Designation	Local Status	Decision Code	Application Status	Submitted Date	Completed	Last Exported	Details
TEST-Graduate Non-Degree Sp 20	None	Unassigned	Complete	Jul 29 2019	Jul 30 2019		Details

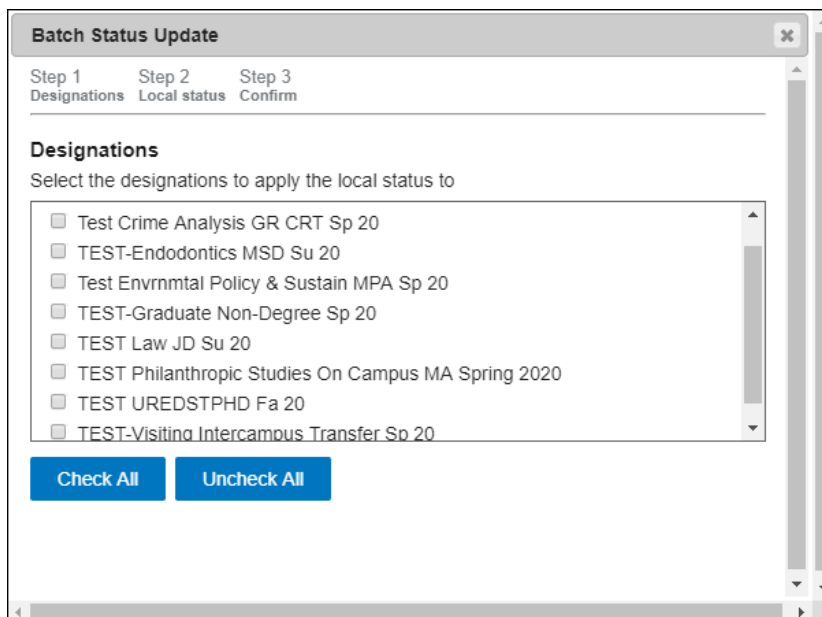
3. Use the **Local Status** drop-down to update the Local Status.

Updating Applicants' Local Statuses in Batch

1. Navigate to any list you've created. This can also be done using filtered search results.

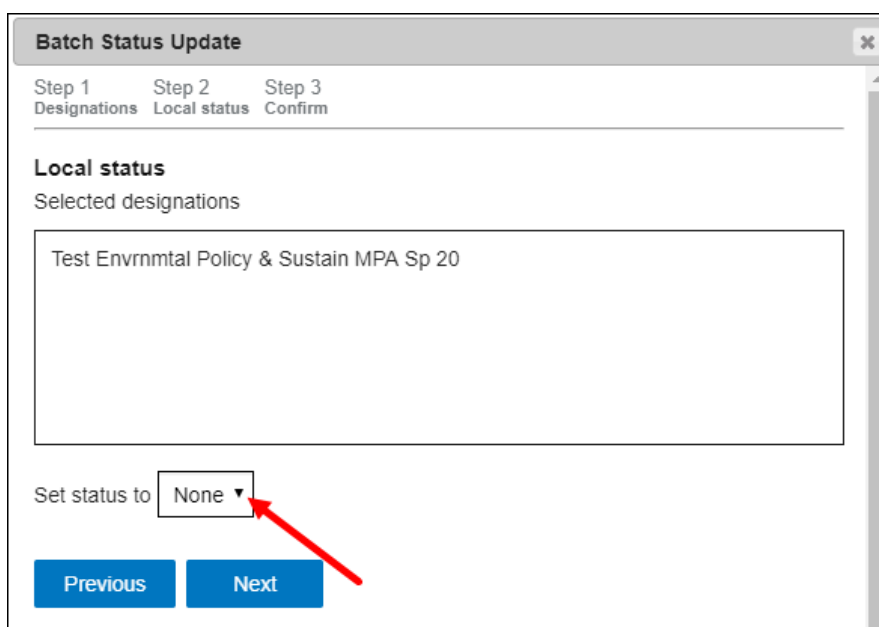
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2. Click [List Actions](#) if using a List or click [Search Actions](#) if using search results.
3. Click **Change Checked Applicants' Status**.



The screenshot shows a window titled "Batch Status Update" with a close button (X) in the top right corner. Below the title bar, there are three steps: "Step 1 Designations", "Step 2 Local status", and "Step 3 Confirm". The "Designations" section is active, with the instruction "Select the designations to apply the local status to". A list of designations is shown with checkboxes: "Test Crime Analysis GR CRT Sp 20", "TEST-Endodontics MSD Su 20", "Test Envrnmtal Policy & Sustain MPA Sp 20", "TEST-Graduate Non-Degree Sp 20", "TEST Law JD Su 20", "TEST Philanthropic Studies On Campus MA Spring 2020", "TEST UREDSTPHD Fa 20", and "TEST-Visiting Intercampus Transfer Sp 20". Below the list are two buttons: "Check All" and "Uncheck All".

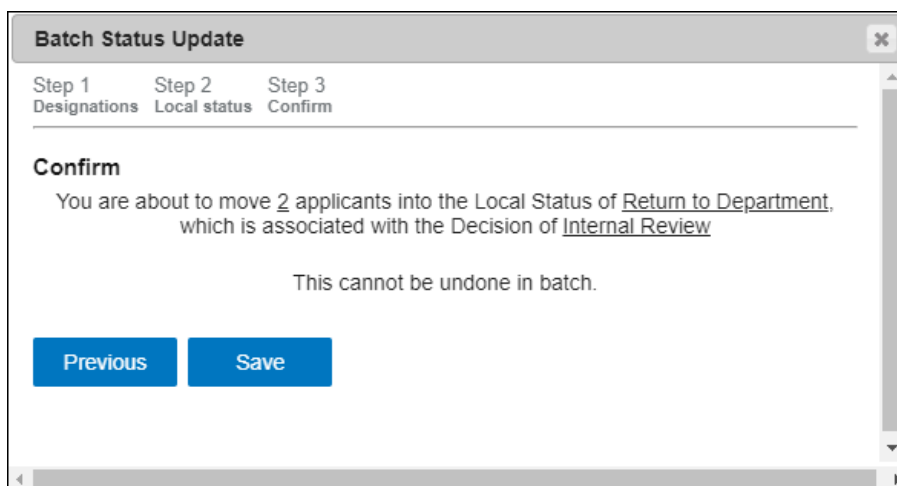
4. In the window that appears, select the designation(s) you'd like this change to impact, then click [Next](#). This selection then limits the new Local Status options, based on what Local Statuses are compatible with the desired designations.



The screenshot shows the "Batch Status Update" window at Step 2: "Local status". The "Designations" step is now inactive. The "Local status" section is active, with the instruction "Selected designations". A text box contains the selected designation: "Test Envrnmtal Policy & Sustain MPA Sp 20". Below this, there is a "Set status to" dropdown menu currently set to "None". A red arrow points to the dropdown menu. At the bottom, there are two buttons: "Previous" and "Next".

5. Select the new **Local Status** and click [Next](#).

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6. Review the changes. **NOTE:** This action cannot be undone in batch.
7. Click [Save](#).

If the batch Local Status change cannot be applied to any applicant for any reason, a **Batch Status Exceptions** window appears with the applicant's name, ID, and other identifying information.

NOTE: You may exclude applicants from your change by unchecking them prior to running the Batch Status Update.

You can run a Batch Status Update after completing [a search](#) by using the **Search Actions** button. The same options also appear in the [Clipboard](#), when using the **Clipboard Actions** button.

Running Your Action Lists

WebAdMIT allows you to group and manage applicants by common criteria. Once you create a list, you can access it as needed and perform various actions. Lists are dynamic and update as your applicant pool changes. The List Manager in WebAdMIT allows you to create [Field Lists](#) based on data from the application (e.g. Application Status, Local Status, Decision Codes, GPA, missing documents, custom fields, etc.), and Composite Lists based on existing Field Lists. See the [Liaison List Manager Help Link](#).

Required Lists

The Required Lists have been set up in the Applicant Lists section of the menu bar. These lists should be run daily to check for new applicants during the admissions cycle.

1. Navigate to the **Applicant Lists** section of the menu bar.

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2. Click the list name (for example Received Applicants, Completed Applicants, etc.) in the menu bar to run the list.

✓	Name & Indiana University Graduate CAS ID	Email	Designation	Appl. Status	Local Status	Decision
✓	Jack 6269992729	JackBickel@mailinator.com	TEST Philanthropic Studies On Campus MA Spring 2020	Complete	Missing Behavioral Document	Internal Review
✓	Luke A. 6523955971	luke@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	Complete	Missing Transcript	Internal Review
✓	Dezra 2681697974	dezra@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	Complete	None	None
✓	Michele D. 6491161446	michele@iupui.edu	TEST Philanthropic Studies On Campus MA Spring 2020	Complete	None	None
✓	Monica 8631154215	monica@iu.edu	Test Environmtal Policy & Sustain MPA Sp 20	Complete	Recommend for Admission	Internal Review
✓	Jennifer 2282161982	mjenner2@iupui.edu	TEST-Graduate Non-Degree Sp 20	Complete	None	None

The following required lists include:

Received: This list in WebAdMIT will return applicants with an Application Status of "Received." Programs should check it daily for new applicants during their admissions cycle. These are your applicants that have designated your program(s) and submitted their application. Not all required recommendations (if applicable) have arrived for these applicants and thus their application is not yet "Completed."

Complete: This list in WebAdMIT will return applicants with an Application Status of "Complete." Programs should check it daily for new applicants during their admissions cycle. These are your applicants that have designated your program(s) and submitted their application. All required recommendations (if applicable) have arrived for these applicants.

Program/Term Change: This list in WebAdMIT will return applicants with a Local Status of "Program/Term Change." Programs should check daily to see if any applicants have been moved manually to the program designation they are responsible for (meaning the applicant initially applied to the wrong program or term).

Return to Department: This list in WebAdMIT will return applicants with a Local Status of "Return to Department." Programs will pull this list daily to see if anything has been "sent back" and requires more information from their school, centralized graduate admissions office, or Office of International Admissions. You'll need to look in the **Notes** section in WebAdMIT to determine why the application was returned.

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Optional Lists

In Progress: Programs can create a list in WebAdMIT on this Application Status. These are applicants that have designated your program(s) and have NOT submitted their application or paid the application fee. You can utilize this list and the email template tool to recruit these applicants and encourage them to submit their application for review.

Deferred – Next CAS Cycle: Programs can create a list in WebAdMIT on this Local Status if they choose to utilize this deferral method. Very limited biographical data will be available in the new CAS Cycle within WebAdMIT for any applicants deferred this way. More can be found on page 13.

Various local statuses created by program admission teams: WebAdMIT provides the flexibility for graduate and professional programs to map their internal admissions process utilizing Local Status codes designed by your admissions team and tied to the Decision Code, "Internal Review". Programs should review the Liaison [Application Review Workflow](#) Help Page for more details on how to set up your internal workflow process. This is not a requirement, but a useful and efficient tool. In addition, if you apply the Local Status of "Internal Review" to all Received and Complete applicants, this will allow you to separate applicants who are already moving through your internal process from those that you have not yet reviewed.

Creating Your Optional Lists

1. Navigate to the **Applicant Lists** section of the menu bar.
2. Click List Manager.
3. Click **New Field List**.

New Applicant Field List

This list, named and **will** appear on the toolbar.

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

Included applicants will match of the following rules:

4. Enter a **Name** for the list and select "will" if you want it to appear on your toolbar under the **Applicant Lists** menu.

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5. Select the **Field** that you want to query on (for example, Application Status).
6. Select an **operator** such as equals.
7. Select the **Application Status** (for example, In Progress).

New Applicant Field List

This list, named and appear on the toolbar.

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

Included applicants will match of the following rules:

This will return Applicants with an Application status of "In Progress." See the [Liaison List Manager Help link](#) for more details on how to create composite lists.

Processing Common Admissions Decisions

Application Status must be "Received" or "Complete" before you can apply an Admissions Decision using Local Statuses.

Recommend for Admissions

Program Steps:

1. Review applicant for admissions decision using internal processes and Local Statuses.
2. Place an admissions decision on the file by changing the Local Status to "Recommend for Admission".
3. Be sure that all required documents for the Central Graduate Office review and OIS/OIA review are uploaded to the applicant's WebAdMIT file if applicable. Examples include: FCA report, transcripts, departmental admission letters, funding letters, etc.

This change in Local Status will allow the applicant's file to now appear in the central graduate office's list created for admission review. If this is an international student, once the central graduate office processes the admissions they will update the Local Status that will be pulled by the Office of International Services / Admission.

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Deny

Program Steps:

1. Review applicant for admissions decision using internal processes and Local Statuses.
2. Place a decision on the file by changing the Local Status to "Deny".
3. This Local Status is tied to the Decision Code "Deny" and will write to SIS overnight. This status is final. You will not be able to undo this without contacting your central admissions office or international admissions.

Withdrawing Applications

Applications can be withdrawn at any stage in the process by completing the steps below. There will only be one Local Status for withdrawing an application titled "Applicant Withdrawn Before Admissions." If your applicant has withdrawn after admissions, your admission decision should already be processed via "Recommend for Admissions" and thus recorded in SIS. This will need to be updated manually in SIS via your campus's current process.

Program Steps:

1. Change Local Status to "Applicant Withdrawn Before Admissions."
2. This Local Status is tied to the Decision Code "Applicant Withdrawn" and will write to SIS overnight. This status is final. You will not be able to undo this without contacting your central admissions office.

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 (see Appendix A) 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" Local Status. See the IU Workflow Design above for more information.

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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.

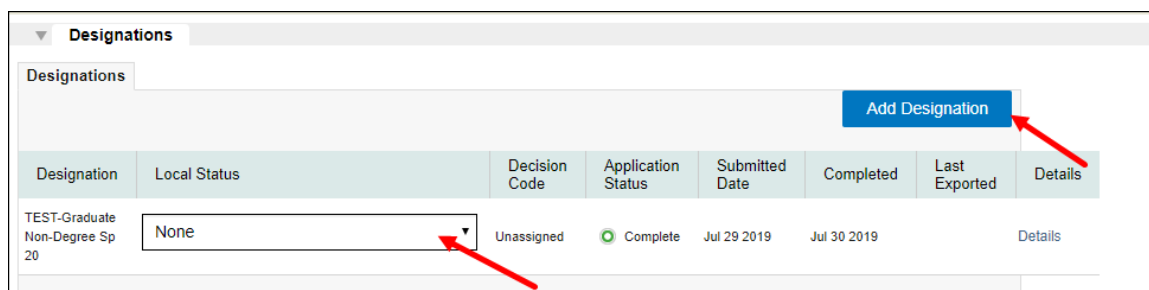
NOTE: Applicants will not have answered Q4 questions for the new designation when using manual designation. This may not be of concern if you are only updating the term. If those questions are important then we recommend they reapply and the program utilizes a coupon code to avoid another application fee (See the [Fee Waiver Options](#) document). The applicant will need only to complete the questions in the new Q4. Also you will not be able to assign the applicant to a program at another campus. Please notify the international admissions office at your institution for any changes made to a student’s file in terms of programs and/or terms to prevent delays in processing.

Initial Program Steps:

1. Program admissions staff assigns the Local status of “Program/Term Change” and manually adds the new designation utilizing the instructions below.

Adding Manual Designations

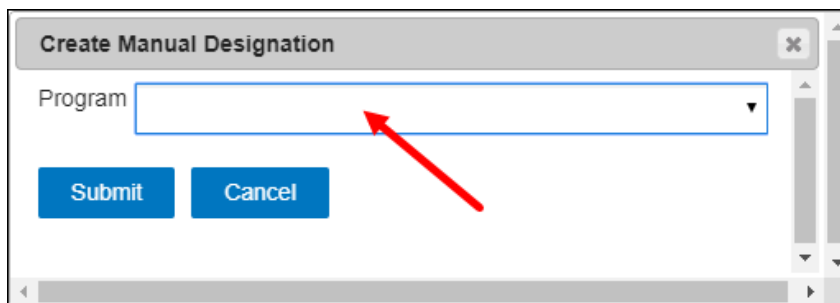
1. Go to the **Designations** panel on the desired *Applicant Details* page.



Designation	Local Status	Decision Code	Application Status	Submitted Date	Completed	Last Exported	Details
TEST-Graduate Non-Degree Sp 20	None	Unassigned	Complete	Jul 29 2019	Jul 30 2019		Details

2. Assign the initial program a **Local Status** of **Program/Term Change**.
3. To change the program in WebAdMIT, click the **Add Designation** button.

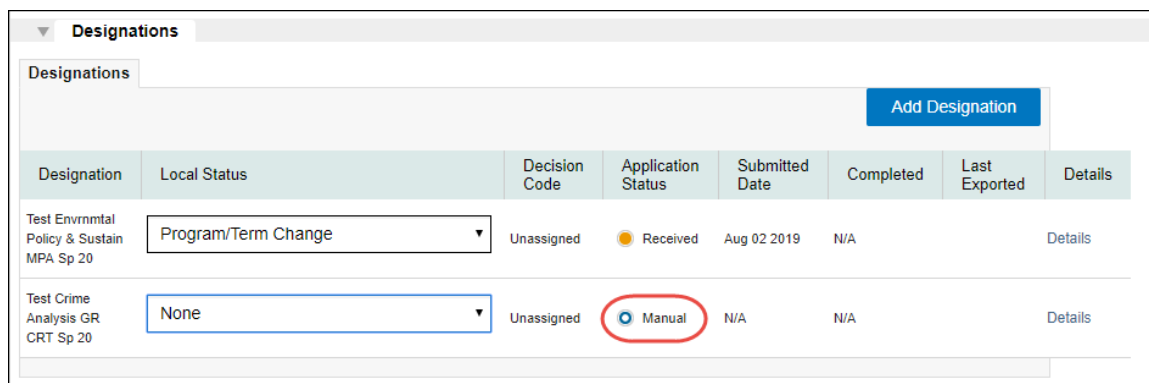
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4. In the window that appears, select the desired program.

5. Click the **Submit** button.

The new designation appears with **Manual** listed as its **Application Status**.



Designation	Local Status	Decision Code	Application Status	Submitted Date	Completed	Last Exported	Details
Test Envrnmtal Policy & Sustain MPA Sp 20	Program/Term Change	Unassigned	Received	Aug 02 2019	N/A		Details
Test Crime Analysis GR CRT Sp 20	None	Unassigned	Manual	N/A	N/A		Details

New Program Steps:

1. Check "Program/Term Change" list for those with the **Application Status** of **Manual**.
2. Set the appropriate **Local Status** on the newly created designation to begin the application review process.

Note that admissions users with access to the newly added Manual designation, but without access to the original applicant-selected designation(s), will only see limited information. Other considerations when viewing the Manual designation include:

- The applicant appears with the **Unverified** tag in the Applicant Header.
- The full application PDF is not available.
- GPAs are not available.
- The CAS Updates subpanel under the History panel is not available.

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Defer Admissions Decision to Next CAS Cycle

Program Steps:

1. Program assigns a Local Status of "Deferred – Next CAS Cycle" – WebAdMIT Decision Code = Deferred Next CAS Cycle Review
2. No further action until the next CAS Cycle.
3. Next CAS Cycle, set the appropriate Local Status on the *Applicant Details* page and begin the application review process.

NOTE: Very limited application data will be visible in WebAdMIT for the new CAS Cycle for this applicant – we recommend that you request the applicant to complete a new application in the new CAS Cycle via the "Re-Application" process and utilize a coupon code without incurring another application fee. The "Re-Application" process will transfer the applicant's data forward to the new CAS. They will only need to complete any new questions added to the application since the previous CAS cycle.

If the applicant does not reapply, their data will not be carried forward to the next cycle in CAS and their applicant record will need to be updated in SIS manually by your central graduate admissions office. The applicant's information will not update automatically in SIS.

Applying after the Deadline

Invitation codes are individual deadline extensions that programs offer directly to applicants. Applicants can use the codes in the Applicant Portal to apply to a program whose deadline has already passed.

If you choose to offer invitation codes, you:

- Request them through the electronic form from Liaison (available soon).
- Specify the new deadline date.
- Distribute them to your applicants.

Each invitation code can only be used once. To help you manage these codes, Liaison can provide reporting that identifies when each invitation code was redeemed and who redeemed it.

When you offer an applicant an invitation code, share the following instructions with them:

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- Enter the invitation code(s) in the **Enter Invitation Code** link either on the *Add Program* page to select an expired program, or on the *Submit Application* page to submit to an expired program previously selected.
- Use the invitation code before the expiration date.
- Do not share the invitation code with others, as it can only be redeemed once.
- Apply the invitation code to the school that offered it.
- The invitation codes are campus specific, but not program specific.

For more information visit the [Liaison Invitation Codes Help Guide](#).

Customizing WebAdMIT for Your Program

Creating Requirements

WebAdMIT allows you to create a checklist of supplemental requirements for each applicant. Requirements can be tracked on a simple fulfilled/not fulfilled basis. Requirements can be found on the Menu Bar under the Management panel.

For more information visit the [Liaison Requirements Help link](#).

Creating New Local Statuses

WebAdMIT provides the flexibility for graduate and professional programs to map their internal admissions process utilizing Local Status codes designed by your admissions team and tied to the Decision Code, "Internal Review". Programs should review the Liaison [Application Review Workflow](#) Help Page for more details on how to set up your internal workflow process. Review the [Local Statuses Best Practices](#) when creating your Local Status categories and workflow. You can also use Local Statuses to [identify new and updated applicants](#). **Your New Local Status can only be created by those in the Director of Admissions Work Group for your department.** When creating a Local Status you must also assign which programs the Local Status can be used by. If a user does not have access to a certain program, the Local Status will not be available by that program for use.

1. Log into WebAdMIT.
2. In the Menu Bar, open the **Management** panel then click **Local Status**.

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INDIANA UNIVERSITY

Local Status Manager

Title	Decision	Color Code	Description	Actions
TEST - App Ready for Review	Internal Review	Green	Application is ready for re...	✎ 🗑
TEST - Missing Transcripts	Internal Review	Purple	Applicant did not upload tr...	✎ 🗑
App Ready for Review	Internal Review	Green	Application is ready for re...	✎ 🗑
Missing Transcripts	Internal Review	Purple	Applicant did not upload tr...	✎ 🗑
To Be Interviewed	Internal Review	Yellow	For Accelerated program only...	✎ 🗑
Missing Behavioral Document	Internal Review	Yellow	Answered yes to behavioral ...	✎ 🗑
Ready for Committee	Internal Review	Purple		✎ 🗑
Deferred-Next CAS Cycle	Deferred	Orange	Defer applicant to next CAS...	✎ 🗑
Program/Term Change		Green	Will create a new applicati...	✎ 🗑
Recommend for Admission	Internal Review	Green	Review assigned to Grad Off...	✎ 🗑
Recommend for Admission-Term Started	Internal Review	Green	Recommending for admission ...	✎ 🗑
Deny	Deny	Green	Final decision of DENY whic...	✎ 🗑
Applicant Withdrawn	Applicant Withdrawn	Green	Final decision of applicant...	✎ 🗑
Return to Department	Internal Review	Red	Returns the application to ...	✎ 🗑
Grad Office Admit-GINT	Internal Review	Red	Grad office approves for ad...	✎ 🗑
Final Grad Admit	Admit - GRAD	Red	Final decision of ADMT/AFQL...	✎ 🗑
Final Grad Conditional Admit	Final GINT Cond ADMIT	Red	Conditional Admit for Domes...	✎ 🗑
Final GINT Conditional Admit	Final GINT Cond ADMIT	Red	Final decision of COND/STIP...	✎ 🗑
Final GINT Admit	Admit - GINT	Red	Final decision of ADMT/AFQL...	✎ 🗑
Application Ready for Review	Internal Review	Green	Application is ready for re...	✎ 🗑

3. Click the **New Local Status** button.

New Local Status

Title:

Active

Decision Code:

Custom Color:

Description:

Programs:

- old EDLDSMSSED Su 20
- Test Crime Analysis GR CRT Sp 20
- TEST-Endodontics MSD Su 20
- Test Envrnmtal Policy & Sustain MPA Sp 20
- TEST-Graduate Non-Degree Sp 20
- TEST Law JD Su 20
- TEST Philanthropic Studies On Campus MA Spring 2020
- TEST UREDSTPHD Fa 20
- TEST-Visiting Intercampus Transfer Sp 20

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4. Enter a **Title** (for example, "Committee Review Required").
5. Verify that the **Active** check box is selected.
6. Select the "Internal Review" Decision Code to apply to the new Local Status.
7. Select a **Custom** Color if you'd like to associate a color with the Local Status. This can make it easier to recognize when an applicant is in a particular Local Status.
8. Select an **Email Template** to link to this Local Status (optional). When an applicant is moved into this Local Status, a window prompts you to send, edit, save as a draft, or do not send the linked email template. Note that this option only appears when email templates exist. To learn more about how to create email templates visit the [Email Templates help link](#).
9. (Optional) Enter a **Description**. This can help to serve as a reminder of what this Local Status is used for.
10. Select the Programs associated with this Local Status.
11. Click the **Create** button.

Now all of the Local Statuses will appear on the *Local Status Manager* page. The statuses can be reordered by clicking and dragging. This will impact the order that they are displayed on the *Applicant Details* 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.**

Creating Custom Fields

Custom Fields allow you to enter and store additional information that are specific to your program needs, but is not collected from the applicant in the initial application process. The Custom Fields are completely internal so these fields will not be viewable to the applicants. There are many possible uses for these fields, such as the Interview Date or Admissions Committee Reviewed Date. Once you create them, custom fields will be available to select in the Export Manager and in the List Manager.

Custom Fields can be added to WebAdMIT at any point and will appear in the Custom Fields panel of the Applicant Details page of every applicant in the selected program. Several types of custom fields can be created, including: Text, Select from list, Date, Yes/No, and Numeric. More information about each type will be listed later in this document.

The following custom fields have already been added: University ID, Application Center, Residency, TOEFL Date, IBT Listening, IBT Reading, IBT Speaking, IBT

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Writing, IBT Total Score, PBT Total, TWE Total, IELTS Date, IELTS Listening, IELTS Reading, IELTS Writing, IELTS Speaking, IELTS Overall Band Score, GRE General Date, GRE Verbal Score, GRE Verbal Percentile, GRE Quantitative Score, GRE Quantitative Percentile, GRE Writing Score, GRE Writing Percentile, GRE Biology, GRE Chemistry, GRE Lit in English, GRE Mathematics, GRE Physics, and GRE Psychology. Do not duplicate these fields.

For more information on Adding Custom Fields, watch the [Liaison video](#).

1. Log into WebAdMIT.
2. In the Menu Bar, open the **Management** panel then click **Custom Fields**.

Custom Fields Manager

Active Fields

	Label	Type	Description	Actions
☰	University ID	Text Value	University ID Number	✎ 🗑
☰	Applicant Rank Group	Select From List	How does applicant rank?	✎ 🗑
☰	Program Name	Select From List		✎ 🗑
☰	Admit Term	Select From List		✎ 🗑
☰	App Center	Select From List	Application Center in SIS	✎ 🗑
☰	Residency	Select From List	Residency decision for the application	✎ 🗑
☰	TOEFL Date	Date	TOEFL Date	✎ 🗑
☰	IBT Reading	Text Value	IBT Reading	✎ 🗑
☰	IBT Listening	Text Value	IBT Listening	✎ 🗑
☰	IBT Speaking	Text Value	IBT Speaking	✎ 🗑
☰	IBT Writing	Text Value	IBT Writing	✎ 🗑

New Custom Field

3. Click the **New Custom Field** button.

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New Custom Field

Programs:

old EDLDSMSED Su 20
 Test Crime Analysis GR CRT Sp 20
 TEST-Endodontics MSD Su 20
 Test Envrnmtal Policy & Sustain MPA Sp 20
 TEST-Graduate Non-Degree Sp 20
 TEST Law JD Su 20
 TEST Philanthropic Studies On Campus MA Spring 2020
 TEST UREDSTPHD Fa 20
 TEST-Visiting Intercampus Transfer Sp 20

[Check All](#) [Uncheck All](#)

Label:

Custom Field Type:

(Field type cannot be changed once set.)

Description:

[Submit](#) [Return to Custom Fields](#)

4. Select the program you want this Custom Field to apply to. If you want it to apply to all of your programs, click on the [Check All](#) button.
5. Enter a **Label** (or name) for the Custom Field. This label will not be visible by the applicants.
6. Select the **Custom Field Type**. There are several options:
 - **Text Value** – This will appear as an empty text box on the applicant’s page. You can enter notes, comments, etc.
 - **Select from list** – This will appear as a drop-down list for each applicant. You will enter the appropriate values. You can then select the applicable value on each applicant’s page.
 - **Date** –This will appear in a text box featuring a pop-up calendar, allowing users to select the applicable date.
 - **Yes/No** – This will appear as a drop-down list with the options of “Yes” and “No.”

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- **Numeric** – This will appear as an empty text box, where you can enter a numeric value that can be carried out to two decimal places. This field will then be treated as numbers in export, lists and scoring. This will allow you to create lists using operators like “greater than,” “less than,” etc. When exporting to Excel, numeric Custom Fields will also be sortable.

NOTE: Once a Custom Field is created, its **Type** is locked in and you cannot change it.

7. (Optional) Enter a **Description**. This will provide other users information about what will be collected in this Custom Field.
8. Click **Submit**.

Now all of the Custom Fields will appear on the *Custom Fields Manager* page. The fields can be reordered by clicking and dragging. This will impact the order that they are displayed on the *Applicant Details* page. To edit the custom field, click the pencil icon.

Custom Fields can't be deleted but they can be deactivated if you no longer want them to appear on the *Applicant Details* page. To deactivate a custom field, click on the red X. The deactivated fields still remain in WebAdMIT, so you may want to rename the field to avoid confusion. Once a field is deactivated, it can be reactivated by clicking on the green plus (+) sign.

Working with Custom Fields from the Applicant's Page

Once the Custom Field is created, you can work with it from each applicant's page.

▶ Personal Information		
▶ Indiana University Graduate CAS Custom Questions		
▶ Custom Questions		
▼ Custom Fields		
Field	Answer	Last Changed
University ID	<input type="text"/>	N/A
App Center	<input type="text"/>	N/A
Residency	<input type="text"/>	N/A

1. When entering data in Custom Fields, hit the **TAB** button on the keyboard to lock in your change. You should see a green flash to indicate your change has taken effect.

The data entered here will now be exportable via the Export Manager. The data can also be used in the List Manager and Scoring sections. The data contained

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within a Custom Field can be communicated to applicants via the email editor's merge feature. You can configure it in an individual email or in an email template.

Custom Fields can also be updated in batch. For more information on this, visit the [Updating Custom Fields in Batch help link](#).

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How to Get Access to WebAdMIT

To request access to WebAdMIT, complete the Access Request form.

1. Complete the required training based on your selected Work Group (see the *Training Requirements by Work Group* section below).
2. The individual who needs access must complete the required [FERPA tutorial](#) and sign the [Acceptable Use Agreement](#).
3. Navigate to the [WebAdMIT Access request form](#).
4. Select the Work Group required, add program codes you will need access for, and click the **Submit** button.

Work Groups

Each WebAdMIT User will be assigned to a Work Group. Work Groups include what a user can do, and what a user can see. The table below lists the various Work Groups and the permissions assigned to each Work Group. When completing the request form, you must select which Work Group you need to be assigned to.

Work Groups	Permissions
- Applicant Interviewer - Admissions Committee (Assigned Applicants)	Can view applicants assigned to them and complete review forms for those applicants only.
Admissions Committee (All Applicants)	View All Applicants: allows users to view information for all applicants that they are responsible for. View Other User's Assignment/Interview Results: allows users to view any applicant's Assignments and Interviews, both on the Applicant Details page and on the Search Assignments and Search Interviews screens.
Application Processor	View All Applicants: allows users to view information for all applicants that they are responsible for. Add Notes: allows users to enter notes on the Applicant Details page. Change Local Statuses: allows users to change the Local Status of an applicant's designation, either individually on the Applicant Details page, or in batches via list or search actions. Email Applicants: allows users to email applicants.

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Work Groups	Permissions
	<p>Manage Lists, Reports, and Exports: allows users to create lists, reports, and exports and define their visibility.</p> <p>Manage Uploaded Documents: allows users to upload and delete documents on an applicant's record for an organization.</p> <p>Modify Applicants' Custom Fields and Requirements: allows users to update an applicant's Custom Fields and Requirements, either from the Applicant Details page or in batches. View All Applicants: allows users to view information for all applicants.</p>
<p>- Director of Admissions</p> <p>- International Affairs Staff</p> <p>- Graduate School Staff</p>	<p>View All Applicants: allows users to view information for all applicants that they are responsible for.</p> <p>Access to CAS Configuration Portal: allows users to gain entry into the CAS Configuration Portal to set up programs.</p> <p>Add Notes: allows users to enter notes on the Applicant Details page. Users without this permission can read, but not create notes.</p> <p>Change Local Statuses: allows users to change the Local Status of an applicant's designation, either individually on the Applicant Details page, or in batches via list or search actions.</p> <p>Configure Software: allows users to access all management functions.</p> <p>Email Applicants: allows users to email applicants.</p> <p>Manage Assignments and Interviews: allows users to assign and delete Assignments and Interviews on applicant pages. Users with this permission can also edit submitted Assignment and Interview results.</p> <p>Manage Lists, Reports, and Exports: allows users to create lists, reports, and exports and define their visibility.</p> <p>Manage Uploaded Documents: allows users to upload and delete documents on an applicant's record for an organization.</p> <p>Modify Applicants' Custom Fields and Requirements: allows users to update an applicant's Custom Fields and Requirements, either from the Applicant Details page or in batches.</p> <p>View Other User's Assignment/Interview Results: allows users to view any applicant's Assignments and Interviews, both on the Applicant Details page and on the Search Assignments and Search Interviews screens.</p>
<p>Department Config Portal Team</p>	<p>View All Applicants: allows users to view information for all applicants they are responsible for.</p> <p>Access to CAS Configuration Portal: allows users to gain entry into the CAS Configuration Portal to set up programs.</p>

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Work Groups	Permissions
	Modify Applicants' Custom Fields and Requirements: allows users to update an applicant's Custom Fields and Requirements, either from the Applicant Details page or in batches.
Department API Team	<p>View All Applicants: allows users to view information for all applicants they are responsible for.</p> <p>API Access: allows users to query WebAdMIT using the API.</p> <p>Access to CAS Configuration Portal: allows users to gain entry into the CAS Configuration Portal to set up programs.</p> <p>Manage Lists, Reports, and Exports: allows users to create lists, reports, and exports and define their visibility.</p> <p>Modify Applicants' Custom Fields and Requirements: allows users to update an applicant's Custom Fields and Requirements, either from the Applicant Details page or in batches.</p>

How to Remove a User's Access to WebAdMIT

To remove a user's access to WebAdMIT, complete the Access Request form.

1. Navigate to the [WebAdMIT Access request form](#). You can also access this form via One.IU by searching on "dart."
2. Follow the instructions for removing a user and click the **submit** button.

Training Requirements by Work Group for WebAdMIT

You must complete the required tutorials based on your Work Group to gain access to WebAdMIT.

Director of Admissions	Required / Recommended
Introduction to CAS (Indiana University) Webinar recording	Required
June 18th Liaison Configuration Portal Training Webinar recording	Required
Workflow Basics the recording from the IUPUI Webinar on <i>The Basics</i> .	Required
WebAdMIT On Demand Courses	Recommended
IU Graduate CAS FAQ for Graduate / Professional Programs	Recommended

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Application Processor	Required / Recommended
Introduction to CAS (Indiana University) Webinar recording	Required
Workflow Basics the recording from the IUPUI Webinar on <i>The Basics</i> .	Required
WebAdMIT On Demand Courses	Recommended
IU Graduate CAS FAQ for Graduate / Professional Programs	Recommended

Admissions Committee and Interviewers	Required / Recommended
Quick Start Guide for Reviewers and Interviewers	Required
WebAdMIT On Demand Courses	Recommended

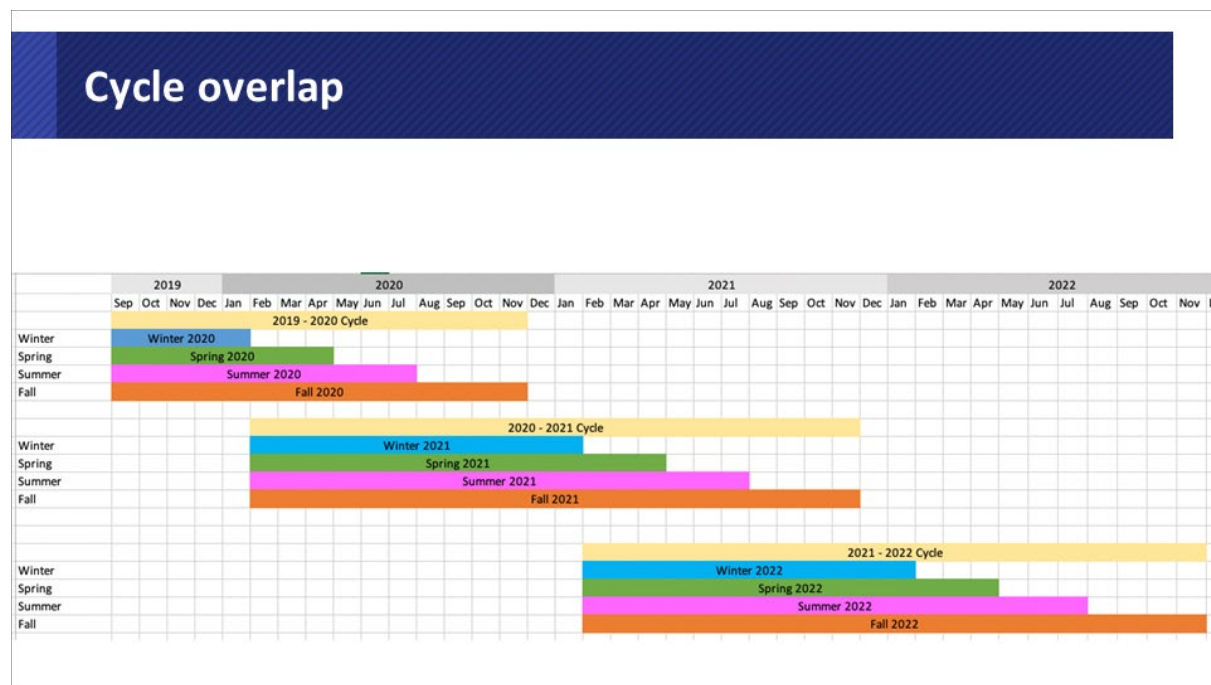
Department Config Portal Team	Required / Recommended
Introduction to CAS (Indiana University) Webinar recording	Required
June 18th Liaison Configuration Portal Training Webinar recording	Required
IU Graduate CAS FAQ for Graduate / Professional Programs	Required - Q4 Configuration Portal Section
WebAdMIT On Demand Courses	Recommended

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Department API Team	Required / Recommended
Introduction to CAS (Indiana University) Webinar recording	Required
Creating Reports	Required
Exporting Data	Required
List Manager – Field Lists	Required
List Manager – Composite Lists	Recommended
IU Graduate CAS API Details	Required
June 18th Liaison Configuration Portal Training Webinar recording	Required only if you are responsible for the Configuring Programs
IU Graduate CAS FAQ for Graduate / Professional Programs	Required only if you are responsible for the Configuring Programs - Q4 Configuration Portal Section
WebAdMIT On Demand Courses	Recommended

Appendix A

CAS Cycle



For more information, see the [Indiana University UniCAS Cycles presentation](#).