Admissions

- Applicant Processing
- Application Form Builder For Admissions Management

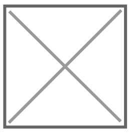
Applicant Processing

Applicant processing or admissions management is for prospective students to apply to an institution and go through the selection process and if selected get admitted/enrolled.

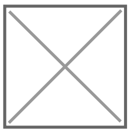
To start capturing applicant data, you must first create the application form. Once a form is created and published the system will generate a public link that you can connect to your institution's website for prospective students to enter data.

If you have not created an **Application Form** yet, read this article on [How to create an application form](#).

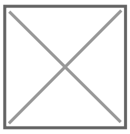
If you have created at least one form and have received applicant data in the system, then navigate to the main menu and select **Admissions - >Dashboard. ** As you engage with the applicants and process them, the dashboard will show you key data for your convenience. The application timeline data gives you visibility of the applications received by month and is also broken down by gender.



Clicking on **Application Received** will take you to **Admissions - >Applicants **page where you can see the list of applicants.



You can search applicants based on Marking Periods by selecting the appropriate value from the drop down menu.



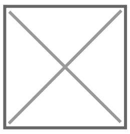
You can also search, export to Excel or list more fields by clicking on the respective icons.

A list of applicants will be displayed with these columns:

1. Applicant's Name
2. Application ID
3. Mobile Phone

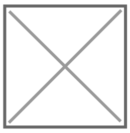
4. Email Address
5. Application Date
6. Status
7. Process

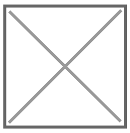
Click on an applicant's name to view the submitted record. On the upper right side of the record it will show the current status of the applicant. You can click on **Process Applicant** to start processing the steps. Clicking on the three vertical dots will show option to **Archive** or **Print** the applicant's information.



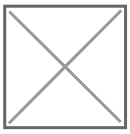
At right side of the applicant record it will show the name of the **Form** that was used to capture the applicant data. You can click on it to view and edit the form if required.

To facilitate proper workflow, there are **Assigned To** and **Tags** features. Click on Assigned To and type in a name of a staff to assign the applicant's case for processing. Click on the Tags to create new or select existing tags. It is a quick and easy way to categorize or filter applicant records.

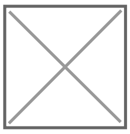




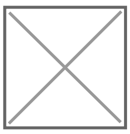
At the bottom of the applicant record, there is a comment section which you can use to capture comments about the applicant as you move the application from the applied to the enrolled state.

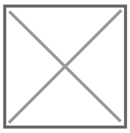


The last two columns of the grid view are important and given below:



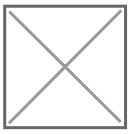
The **Status** column will show the current status of the applicant. Below are the available statuses:





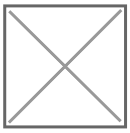
When an applicant data is received for the first time, it will always default to "Applied".

Under the **Process** column there is a gear icon. Click that to process an applicant's data.



Each of the **Process Steps** (decision gates) must be completed to convert an applicant into a student. Based on what the **Enrollment Status** you set, the applicant will get an automated email. *At this time these are system generated canned emails, but you will be able to edit them. This feature is coming soon.*

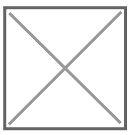
After all the **Process Steps** are checked, you can set the **Enrollment Status** to **Enrolled** and update the record.



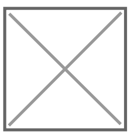
At this time another box will open where you have to select the **Grade Level** and enter the **Enrollment Date** of the applicant.

There are two more radio buttons. If you designed the application form to accept documents from applicants, then turning this switch on will copy the documents to the Student's document tab in the student record. You will be able to view them when you view the student record.

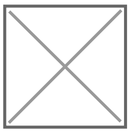
The second radio button is to connect the application information to the Student 360, which means that you will be able to view the whole application data that the student submitted from the student master record without having to go back to the admissions module and search for enrolled applicants. This is a convenient way to view the submitted data.



Once you enroll the applicant, that data will show on the student list as an enrolled student. At this point, you can archive the applicant record.



Please note that once an applicant has been enrolled, that record cannot be re-processed. The process icon will be greyed out.



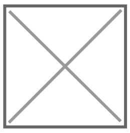
Application Form Builder For Admissions Management

Applicant processing or admissions management is for prospective students to apply to an institution and go thru the selection process and if selected get admitted/enrolled.

To start capturing applicant data, you must first create the application form. Once a form is created and published the system will generate a public link that you can connect to your institution's website for prospective students to enter data.

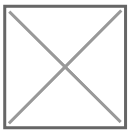
Navigate to the main menu and select **Admissions - >Application Forms.**

If you do not have any forms built already, then the data grid will be empty. Click on **+Add Application Form** to create your new first form. On click, the form builder designer will open up. On the very top you will notice that a default form name will be created like this (with the date and time of your creation). Click on it and change the name.

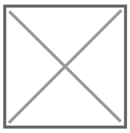
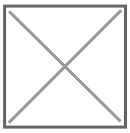


On the left panel, under the **Field Manager** tab, there will be a list of system fields from the Student master record displayed. If you use these fields in the application form, the data collected will get mapped one-to-one when you convert the applicant into a student. These data fields will be available in the Student record. Just drag and drop fields from the left to the right (into the form builder designer) to use it.

Click on the **Basic Elements** tab and you will find many components to use in your form. Fields created with the components will not be mapped to the student record. However, the application form data will be available to view. Just drag and drop components from the left to the right (into the form builder designer) to use it.

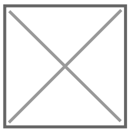


If you need more system fields to to map from the Application form to the Student record, then create those fields as custom fields from the Settings menu. "How to add student custom fields"

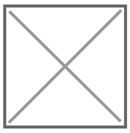
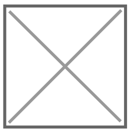
The form designer has a pre-built switch that says **Allow Direct Enrollment**. What this means is that if you turn the switch on, then the applicant will be directly enrolled into a student bypassing the processing steps. A typical use case will be if you are collecting applicant data for continuing education students or certificate course students, then you can enroll them directly without additional steps.

You will notice that any new form will always open with the **Identification Information** as a header and the **Name** fields already pre-populated. You can click on the header and a gear and trash can icons will display. Click on the gear icon to change the name of the form. To delete the header click on the trash can.

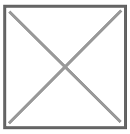


The Name field with Salutation, First Name, Middle Name, Last Name and Suffix is pre-populated and cannot be removed or edited. Since an application form will always collect the name of an applicant, this is given for your convenience. Also, the form fields will listed vertically one below the other, Only the name filed will occur horizontally as a group since it is pre-built.

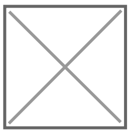
In the **Address & Contact** section, when you drag and drop the Home Address or Mailing Address, the entire address block with street, city, state, country, zip will be displayed. This block cannot be edited and must be used as-is.

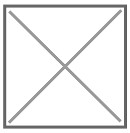
To create a multi-page form click on **+ Add New Page**. Another page with default heading will open. Edit the page header and continue building the form.



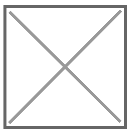
At any given time, you can Save the form as a draft so that you do not lose your work by clicking on the down arrow key of the Save & Publish button.



When the form is built as per your requirement, click on Save & Publish. It will generate a public URL that you can copy and link to your website by clicking on the **Copy Published URL**. Click on the **Preview** button to see how the form will look on a browser.



Once the form is created and saved, it will show on the form list. The last three columns will look like this:



1. If you have the Allow Direct Enrollment switch turned on, it will show "Yes".
2. If the form is published, the Status will be "Active". when unpublished it will show "Inactive".

The following are the features of the icons under the Action menu:

1. The Pencil will allow you to edit the form
2. The Trash Can icon will allow you to delete the form. However, if you have published a form and used it to collect applicant data, you will not be allowed to delete it. It will have database association. You can "Unpublish" the form and make it "Inactive" so that it cannot be used.
3. The Envelope icon will allow you to view and edit the email templated associated with the form. *(This feature is not yet available but will be coming soon).*
4. The Eye icon will allow to you preview the form.
5. The Double Document icon will allow you to copy the form. This is a very handy feature that you can use to create different forms for different uses. You do not have to start from scratch. Just copy an existing form and add, edit and remove fields and components.