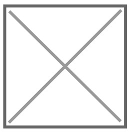
Applicant Processing

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.

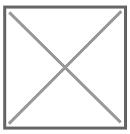
To start capturing applicant data, you must first create the application form. Once a form is created and published the system will generate a public link that you can connect to your institution's website for prospective students to enter data.

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

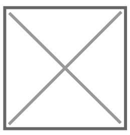
If you have created at least one form and have received applicant data in the system, then navigate to the main menu and select **Admissions - >Dashboard. ** As you engage with the applicants and process them, the dashboard will show you key data for your convenience. The application timeline data gives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

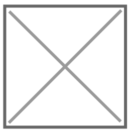
At this time another box will open where you have to select the **Grade Level** and enter the **Enrollment Date** of the applicant.

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.



Revision #5
Created 2026-01-26 21:00:16 UTC by Administrator
Updated 2026-01-26 22:02:58 UTC by Administrator