



LIAISON

CAS

experience

JULY 24-25 2023

CHICAGO, IL

# Maximizing Efficiency – Identifying and Corresponding with New and Updated Applicants in WebAdMIT

Date: July 24, 2023



# Meet Our Presenter



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Learning Experience Designer  
Liaison International



# Agenda

Placeholder for optional subtitle for agenda.

1. Find new and updated applicants using the List Manager
2. Use List Manager, Local Statuses, or Custom Fields to organize your communication flow
3. Send emails individually or in bulk

# Finding new and updated applicants



# Using the List Manager

- Find applicants using common criteria
- Lists change as applicant criteria changes
- Use List Actions to maximize your efficiency

New Applicant Field List

This list, named  and  appear on the menu bar.

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

All

Included applicants will match  of the following rules:

<input type="text" value="State"/>	<input type="text" value="equals"/>	<input type="text" value="New York (United States)"/>	<input type="text" value="-"/> <input type="text" value="+"/>
<input type="text" value="State"/>	<input type="text" value="equals"/>	<input type="text" value="Connecticut (United States)"/>	<input type="text" value="-"/> <input type="text" value="+"/>
<input type="text" value="State"/>	<input type="text" value="equals"/>	<input type="text" value="New Jersey (United States)"/>	<input type="text" value="-"/> <input type="text" value="+"/>

# Understanding Local Statuses

- Track applicants through your admissions process
- Local Statuses are for internal use only (applicant's can't see them)
- Tie emails to a Local Status for maximum efficiency






# Tracking data with Custom Fields

- Store information not collected in the CAS application
- Add custom fields to Email Templates as merge fields
- Use List Manager to updated Custom Fields in bulk

## Custom Fields Manager

New Custom Field

### Active Fields

	Label	Type	Description	Actions
	Student ID	Numeric (2)	Imported student ID from Banner	 

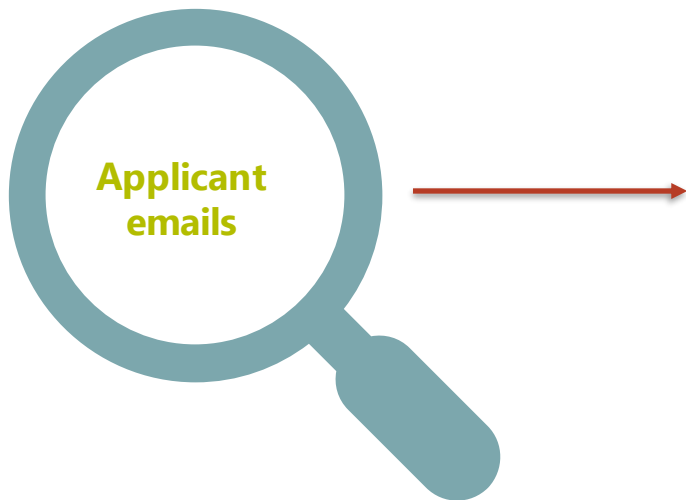


# Corresponding with Applicants





# Building CAS Emails into Your Workflow

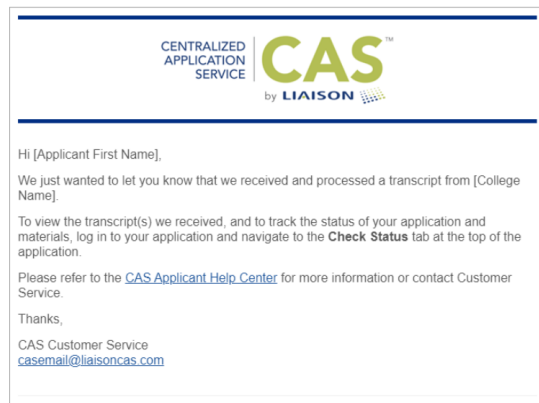


## Automated Applicant Emails During the CAS Application Process

### Overview

At routine moments in the application process, a CAS will automatically send emails to applicants. These emails guide applicants through the application process, ensuring that they are regularly communicated with and can access additional resources, including the Applicant Help Centers and customer service information.

*Email template example:*



- Table of contents
- Overview
- Application Account Emails
- Application Processes Emails
  - Fee Waivers
  - Letters of Evaluation
  - Observation Hours
  - Professional Transcript Entry (PTE)
  - Official Transcripts and Evaluations
  - Verification
  - Academic Update (AU)
  - Official Test Scores
- Undelivered and On Hold Applicants

[https://help.liaisonedu.com/WebAdMIT\\_Help\\_Center/Documents\\_and\\_Reference\\_Guides/Automated\\_Applicant\\_Emails\\_During\\_the\\_CAS\\_Application\\_Process](https://help.liaisonedu.com/WebAdMIT_Help_Center/Documents_and_Reference_Guides/Automated_Applicant_Emails_During_the_CAS_Application_Process)

# Live Training

The screenshot displays the WebAdMIT interface for an Admissions Officer. The top navigation bar includes links for Admissions Officer, Dashboard, Account, End Impersonation, Old User Interface, and Logout. The current user is identified as 'Watertown University / College of Engineering (2014 - 2015)'. The main content area is titled 'Logged in as Admissions Officer' and is divided into several sections:

- Applicants:** A sidebar menu with options for Applicant Lists, Reports & Exports, Management, and Usage Help.
- Notes from Watertown University:** A table listing notes for a specific applicant.
 

Name	Watertown University ID	Note Date
Demo, South (Lesson Test Account) B.	3233367924	Sep 25 2016
- Recently Submitted Designations:** A table listing designations for various applicants.
 

Name	Watertown University ID	Designation	Date Submitted
Demo, Jason	8064541856	Computer and Information Technology	March 30, 2017
Demo, Suchawan	6870967564	Aeronautical Engineering	March 02, 2016
Demo, Bryant	6010612250	BU-College of Engineering	December 15, 2015
Demo, Bryant	6010612250	BU-College of Engineering	December 15, 2015
Demo, Jeff	373922211	Doctor of Podiatric Medicine	October 26, 2015
- Designations by Local Status:** A summary of designations by local status.
  - 80 None
  - 3 Received
  - 1 Second Interview
  - 2 Deferred to 2017
  - 1 Admitted to next year
  - 2 Scholarship Approved
  - 0 Under Consideration
  - 4 Admit Conditional
  - 2 Admitted
  - 48 For PDF Printout
  - 1 Admission Denied
  - 110 Total
- Designations by Decision:** A summary of designations by decision.
  - 53 None
  - 49 Application Received
  - 0 Wait Listed
  - 1 Denied
  - 5 Offer Made
  - 0 Offer Accepted
  - 0 Reconsidered
  - 2 Deferred
  - 0 Offer Declined
  - 0 Withdraw
  - 0 Matriculated
  - 110 Total
- Designations by Application Status:** A summary of designations by application status.
  - 86 In Progress
  - 7 Received
  - 2 Complete
  - 0 Verified
  - 1 On Hold
  - 2 Undelivered
  - 12 Manual
  - 112 Total

At the bottom of the interface, there is a footer with technical details: 'Qac: deployed on we-app-2032442762-4jdfit revision afabba4f 12 days ago, vvv Rails v3.1.12/Ruby v1.9.3' and '© 2009-2017 Liaison International - All Rights Reserved'. The association information is 'Association 102, Organization 4964, User 35639, User Identity 62568'.

# Liaison Academy

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# WebAdMIT Help Center

[https://help.liasonedu.com/WebAdMIT\\_Help\\_Center](https://help.liasonedu.com/WebAdMIT_Help_Center)



Q How can we help you?

WebAdMIT Help Center


## WebAdMIT Manual

Welcome to the WebAdMIT Help Manual! The categories on this page have been arranged to aid new users in learning the software. All of WebAdMIT's features are categorized by topic and functionality. Note that there is a lot of crossover between WebAdMIT features and functionalities; be sure to look out for the hyperlinks to find those crossovers.

Check out the [WebAdMIT Glossary](#) for commonly-used terms and definitions.

### Navigating WebAdMIT


This guide shows you how to quickly find the information you're looking for in WebAdMIT.



- Dashboard
- Applicant Details Page
- Customizing the Applicant Header
- Direct Applicants
- Early Decision Applicants
- ...

### Creating and Managing Users


Here you'll find guidance on adding new users to WebAdMIT and assigning them the permissions of your choosing.



- Creating Work Groups
- Creating Users

### Categorizing Applicants


Here you'll learn how to search for, group, and organize all of your applicants in WebAdMIT.



- Searching for Applicants
- Local Statuses
- List Manager
- List Manager - Composite Lists
- Using the Clipboard
- ...

### Corresponding with Applicants

This guide walks you through creating, managing, and tracking messages sent to your applicants in WebAdMIT.



- Sending Emails
- Email Templates
- Email Addresses
- Viewing Email History



Q&A



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# Thank You

Liaison Academy  
Education & Knowledge Team  
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