CSDCAS 2017-2018
Cycle Prep and Information

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Cycle Timeline from Prep to Launch

**Happening Now:**
- Complete and return the CSDCAS participating agreement to Karen Jacobs and/or CAPCSD
- Identify primary and secondary contacts (main WebAdMIT users) to CSDCAS
- Primary and secondary contacts given 17-18 cycle WebAdMIT access to the Configuration Portal
- Review Configuration Portal training information and attend this review session
- **Complete Configuration Portal setup and submit for review by June 30, 2017**

**July 2017:**
- Submit any change requests for the Configuration Portal to WebAdMIT ASAP.
- Complete Google docs indicating deadline color code preferences and 1 vs. All program selections
- Update program websites with current CSDCAS cycle information and requirements
- Primary and secondary contacts assign 17-18 cycle to other users in WebAdMIT and set up work groups

**August 2017:**
- CSDCAS launches for applicants August 2, 2017. Changes to the Configuration Portal can no longer be made.
- Primary and secondary contacts should check off the program box for WebAdMIT users
- The ETL (data) to WebAdMIT will be turned on, with Transfer Settings, by August 3, 2017
Configuration Portal Tips

General Setup:
• The “Open Date” is the date you want your program to be live for applicants to select on the application. If you choose a date after August 2, 2017, your program will not be available when CSDCAS launches.
• Choose a pre-approved deadline: Sept 15, Oct 1, Nov 1, Dec 15, Jan 1, Jan 15, Feb 1, Feb 15, March 1, or April 1.
• CSDCAS requires that you select “Show Deadline” under “Deadline Display.”

Documents:
• Personal Statements are NOT collected at the CAS level. Require a Personal Statement if you require an essay.
• References are collected at the CAS level, not within Documents.

Questions:
• Remember to first create a Question Set (heading) before adding a Question.
• If you have a short answer question, select “Essay” as the answer type, NOT “section text box.”

Submitting for Review and Making Changes:
• Once you have submitted for review, you cannot make changes. After Aug 1, neither can WebAdMIT.
Configuration Portal Help and Training

The Configuration Portal launch email received by primary and secondary users contains a lot of useful information for accessing and setting up your portal. In addition, the following resources are available:

**The Configuration Manager Help Guide:**
Detailed step-by-step instructions on how to complete your program setup and offers user tips and best practices:

**Configuration Portal Training Program:**
An interactive training program walking you through each step of the process:
http://elearning.easygenerator.com/8fe3d146-4570-43dc-b5e7-8be8ba00e97f/#login

**Configuration Portal Questions:**
Email our WebAdMIT support team with questions at webadmitsupport@liaisonedu.com.
Information to Provide on Your Website

**Program Admissions Information:**
- Explain your application process and state your deadline date
- List required materials and prerequisites
- Be clear that students send transcripts, LORs, and GREs (if applicable) to CSDCAS
- Provide instructions and links for any supplemental applications or fees
- Provide the school ETS code (or CSDCAS ETS code) for GRE scores
- Clearly state if applicants must send additional documents such as transcripts, to the school directly.

**CSDCAS Application Information:**
- Launch Date: August 2, 2017
- Link to Application: [https://csdcas.liaisoncas.com/applicant-ux/#/login](https://csdcas.liaisoncas.com/applicant-ux/#/login)
- Link to Application Instructions and FAQ: [https://portal.csdcas.org/csdcasHelpPages/instructions-and-faq/](https://portal.csdcas.org/csdcasHelpPages/instructions-and-faq/)
- Applicant Customer Service Phone and email: 617-612-2030, csdcasinfo@csdcas.org
- Encourage applicants to monitor their “Check Status” tab on their applications for real-time status information
- Verification can take up to 4 weeks; be sure to emphasize this so students can plan accordingly
WebAdMIT Setup: Users and Workgroups

Each cycle, only the primary and secondary users reported to CAPCSD from each program will be granted automatic access to the new cycle on WebAdMIT. These users are known as “institution managers,” and have the responsibility of setting up the Configuration Portal, granting WebAdMIT access to other users at their program, and managing the access permissions of their school’s WebAdMIT users.

**Setting up Work Groups**

Work groups allow you grant specific users the ability to only access certain WebAdMIT features or restrict what they can see from applicants. Work groups do NOT transfer over and need to be set up manually each cycle. You will want to set up work groups prior to giving users access to the new cycle.

**Adding the New Cycle to Existing Users**

For users who previously had access, you must add the new cycle to their existing account. Navigate to the cycle which they previously had access, and look up their account under “Admissions Users,” and click the pencil icon to edit their account. Then click the green plus sign next to the cycle year you would like to add. You can then edit their account on the current cycle to assign them the appropriate work group permissions.

**Adding Brand New Users:**

Click the “New User” button to create a WebAdMIT account for a user who has never had one before.
WebAdMIT Setup: Transferring Settings

Starting August 3, 2017, the ability to transfer your WebAdMIT settings from your previous 2016-2017 cycle setup to the 2017-2018 application cycle will be available.

What Items Can Be Transferred?
- Local statuses, lists, scoring models/point tables, exports, custom fields, local GPAs, pre-req GPAs, assignments, interviews, and email templates.

What Items Can Not Be Transferred?
- Work groups, admissions users, user permissions, reports, and decision codes.

Transfer Tips:
- Settings for the entire organization can only be transferred once by one individual. That individual will become the owner of everything which carries over.

  - Clicking “dismiss” on the transfer setting box will remove the option to transfer settings for the duration of the application cycle.

  - Any carry-over items must be set to be visible by “Everyone” to carry over. Items set to other settings will not be carried over unless it was created by the individual performing the transfer setting.

  - Note that choosing to transfer settings will overwrite any setup done prior to the settings transfer. If you plan on transferring your settings, please refrain from setting up items prior to the settings transfer.
WebAdMIT Setup: Applicant Data

The CSDCAS applicant portal opens on **August 2, 2017**. If you have selected that date as your open date then any students who have selected your designation should begin to appear in WebAdMIT on **August 3, 2017**.

If you are NOT seeing applicants in WebAdMIT starting August 3, it is likely your program has not been checked off on your account settings. Edit your account and ensure the program you would like to view applicants for has been checked off at the very bottom of the page. Ensure you have also checked off the appropriate program boxes for your other admissions users:
WebAdMIT Setup: Applicant Statuses

Applicant numbers appear on your dashboard in the “Designations by Application Status” window:

**In Progress:** Applicants have listed your program on their app, but have NOT paid or submitted. These applicants can still remove your program.

**Received:** Applicants have submitted their application and paid to apply to your program. However, CSDCAS is still waiting for required materials from the applicant.

**Complete:** CSDCAS has received all materials needed to verify an application.

**Verified:** The applicant’s transcripts have been reviewed and their GPA calculated. Note that applicants may still be missing materials not required for verification, such as letters of reference or official test scores.

**Undelivered:** During the verification process, our staff found errors to the coursework section. The application has been returned to the applicant to make corrections and is waiting for them to do so and resubmit to CSDCAS.

**On Hold:** CSDCAS has placed the application on hold. Common reasons are duplicate accounts, applicant requested withdrawal, payment issues, and code of conduct violations. A note has been placed on the application.
WebAdMIT Setup: Data Integration and Exports

Data Integration with API:
If you are interested in exporting both data and documents from WebAdMIT as well as automating those exports, please share the information on this site with your IT staff. It provides the specifications on APIs (Application Protocol Interface) as well as other instructions on data extraction and integration: https://developer.webadmit.org

Custom Export Layout:
The Custom Export Layout (CEL) is available in the Support Resources section of WebAdMIT (bottom left navigation). The CEL provides you with every data field available in the CSDCAS application so you and/or your IT team can create custom exports in WebAdMIT and then map and crosswalk the data fields in those exports from CSDCAS into a data repository of your choice (e.g. Banner, PeopleSoft, etc).

Testing Exports:
You can begin building your exports at any time once you have access to the new cycle, but you cannot TEST the export until you begin receiving applicant data (8/3/17 and after). At least one applicant must be in your system in order to test an export.
WebAdMIT Help and Training

The following resources are available to assist you with WebAdMIT:

**WebAdMIT Training Program:**
An interactive training program walking you through each step of the process:
- [Level 1 WebAdMIT Training](#)
- [Level 2 WebAdMIT Training](#)

**WebAdMIT Webinars:**
Webinars are run once a month; you can sign up for our monthly webinars by visiting our training page: [http://webadmit.liaisonedu.com/inquiryform](http://webadmit.liaisonedu.com/inquiryform)

**WebAdMIT Portal Questions:**
Our WebAdMIT support team is available to answer questions by phone by calling 716-636-7777 ext. 7. They are available Monday-Friday, 9AM-8PM EST.
You can also email our WebAdMIT support team with questions at [webadmitsupport@liaisonedu.com](mailto:webadmitsupport@liaisonedu.com)