Admissions
IU Application Checklist/Item Setup and Automated Checklist Process

Overview
The IU App Checklist/Item Setup page in SIS is used to set up the applicant checklist that will be assigned when an application posts to SIS via the e-Application process or is saved to SIS via the hard copy application load process.

Steps
IU Application Checklist/Item Setup Page

1. Navigate to: Main Menu>Student Admissions>IU-Specific Options>IU App Checklist/Item Setup.

2. To add a new value, click on the Add a New Value tab or the Add a New Value link at the bottom of the page. You may also use the Search Criteria fields to look up any existing values for your campus.

3. On the Add a New Value page, you will specify the population the checklist will be assigned to by:
   - Academic Institution
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- Academic Career
- Application Center
- Admit Type
- Admit Term - This is a required field. It is imperative that checklist assignment is set up prior to accepting applications for a new term.

4. After entering the population criteria, click **Add**.
5. Enter or select a **Checklist Code**. This is the checklist to add to the population listed at the top of the page.

- New checklists have been created for each of your Admit Types based on information provided to ASSC by your campus.

6. Enter or select an **Academic Program** code. This is the academic program (as part of the population) to which the checklist should be assigned.

**NOTE:** The **Academic Program** field is not a required field. Only use it if applicable. Using this feature requires that a checklist for the specific program has been created on the checklist table.

**NOTE:** In order for the automated checklist completion to work, it is imperative that **External Org ID** is included on the transcript checklist item so that the appropriate checklist item is completed when the document is marked as received in the SIS. In order to accomplish this, we have added the following check boxes to the Set up page: Include **High School Transcript** and Include **College Transcript**.

7. If the High School transcript checklist item (**AADMHT**) should be included in the checklist assignment, click the Include **High School Transcript** checkbox.

- Checking this box will add the checklist item (**AADMHT**) for the High School provided on the e-Application including “Home School” and “High School Equivalent Diploma.”
- Checklist item will need to be added manually for hard copy applicants during the application load process.

8. If the College Transcript checklist item (**AADMCT**) should be included in the checklist assignment, click the Include **College Transcript** checkbox.
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- Checking this box will add the checklist item (AADMCT) for each of the Colleges/Universities provided on the e-Application.
- IU Campuses are not included in this assignment.
- Checklist item(s) will need to be added manually for hard copy applicants during the application load process.

9. Specify checklist items that should be assigned when specific recruiting categories are present on the application.
   - Enter or select a Recruitment Category and Tab to the next field.
   - Enter or select a Checklist Item Code. At a minimum, all applicants should have the ADMAAC Checklist Item Code assigned when the BEHA Recruiting Category is present.

10. Specify customized due dates you would like to assign to the checklist based on the presence of specific recruiting categories.
    - This is not required. Most checklists currently have a default due date of 30 days. If you use specific due dates on your checklists (rather than the standard default due date of 30 days) you may opt to use custom Due Dates. These can be assigned based on Recruiting Categories that are added to the application when it is saved/posted to SIS.
    - If you would like to use custom due dates, the current checklist set up should be reviewed to determine if additional checklists need to be created to accommodate due dates by term and/or ensure that the appropriate recruiting categories are being assigned to drive custom due date assignment.
    - To add custom Due Dates, enter or select the Recruiting Category and enter the custom due date in the *Due Date field. This will overwrite the due dates on the overall checklist and checklist items. If the applicant has more than one of the categories in the Custom Due Dates section, the earliest date will be used.
11. If you would like to add another checklist, click + at the top of the Checklist section and enter or select the Checklist Code for the additional checklist you would like assigned to the population. For example, ASSC would like each applicant to have a staff facing Residency Decision checklist added to their record.

12. When you have all the checklists added, click Save.

When the *IU Application Checklist/Item Setup* page is complete, it should look similar to this:
Automated Checklist Process in SIS: Completing Checklists

The automated checklist completion process was developed to complete initiated checklist items when data is received, and/or data entered into SIS, and update application records to “Complete Awaiting Decision” when all of the initiated items on a checklist have been completed.

Inserting COAD row (Complete Awaiting Decision)

Application records will be updated to APPL/COAD or DDEF/COAD when all of the initiated items on a checklist have been completed and meet the following criteria:

- The checklist is associated to the application
- Checklist Administrative Function = ADMP
- Application Career = UGRD
- Application Center = UGRD
- The checklist was completed within the last half day

A COAD row will be inserted for all applications that are coded with a program action APPL or DDEF, except for those coded DDEF/RAIN or DDEF/GRPS.

Checklist Item Completion

Checklist items that are completed automatically are completed either when the data entry has been done in SIS or the document has been received and indexed to a record in OnBase.

SIS Data Entry

The following checklist items are completed when the corresponding data is entered to SIS:

- AADMHT (High School Transcript/Equivalent)
  - High School Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Will complete regardless of transcript status
  - Will be completed if the AC02 recruiting category is added to the application when it posts to SIS
- AADMHF (Final High School Transcript)
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- High School Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
- Transcript cannot have a data source of “Self-Reported”
- Transcript must have a transcript status of “Final”

- **AADM7G (7th Semester Grades)**
  - High School Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Transcript must have a transcript status of “7th Sm”

- **AADM7M (Mid-7th Semester Grades)**
  - High School Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Transcript must have a transcript status of “Mid 7th Sm”

- **AADM8M (Mid-8th Semester Grades)**
  - High School Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Transcript must have a transcript status of “Mid 8th Sm”

- **AADMCT (College Transcript)**
  - College Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Will complete regardless of transcript status
  - Will complete if the AC06 recruiting category is present when the application posts to SIS

- **AADMCF (Final College Transcript)**
  - College Transcript must have a received date that is less than 6 months from when the checklist was added; received date cannot be blank
  - Transcript cannot have a data source of “Self-Reported”
  - Transcript must have a transcript status of “Final”

- **AADMTS (All ADMS-SAT/ACT)**
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- Will mark complete when SAT and/or ACT scores have been received through any source except self-reported, web, Ad-Hoc, Emp, or Ad-Hoc Org
  - AADMAT (ACT/SAT scores from the testing agency)
    - Will mark complete when a complete set of SAT scores are received with a data source of ETS and/or ACT scores are received with a data source of ACT
  - AADMWS (SAT/ACT scores with Writing)
    - Will mark complete when a complete set of SAT or ACT scores including the writing component are received with a data source of School, ETS, or ACT
  - ADMGAV (new test scores)
    - Will mark complete when a complete set of SAT scores are received with a data source of ETS and/or ACT scores are received with a data source of ACT if the test score received date is >= the checklist item status date for the initiated checklist item
  - AADMES (TOEFL Scores)
    - Will mark complete when scores have been received through any source except self-reported, web, Ad-Hoc, Emp, or Ad-Hoc Org
  - AADMFE (Application Fee)
    - Will mark complete if App fee calc status = “calculated” and app fee status = Received, Waived, Waiver, Not Applicable, or Previously Paid
  - AADMFW (Fee Waiver)
    - Will mark complete if App fee calc status = “calculated” and app fee status = Received, Waived, or Previously Paid
  - AADMRD (Residency)
    - Will complete when residency has been assigned
  - NWPAT/KADMPT (IUN/IUK Placement Test Scores)
    - Will complete when CMPSS scores are received
  - SBENG (SB English Placement Test Scores)
    - Will complete when SBENG component scores are received (PLTSB Test ID)
  - SBMAT (SB Math Placement Test Scores)
    - Will complete when SBMAT or MA700 component scores are received (PLTSB Test ID)

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Document Arrival
The following checklist items will be completed when a document is indexed to the applicant in OnBase:

- AADMAE (Essay)
  - Document: ADM Essays
- ADMFJZ (Activity Resume)
  - Document: ADM Activity Resume
- ADMGAI (Student Signature)
  - Document: ADM Application Signature
- ADMGAW (Audition Results)
  - Document: ADM Audition Results
- BADMDP (Departmental Permission for 2nd Degree)
  - Document: ADM Departmental Permission for 2nd Degree
- ADMGAQ (Personal Statement)
  - Document: ADM Personal Statement
- ADMGAG (Senior Schedule)
  - Document: ADM Senior Schedule
- ADMGAN (Missing Time)
  - Document: ADM Statement of Missing Time
- ADMYPL (Stipulation Letter-Signed)
  - ADM Stipulation Letter-Signed
- ADMYPM (Summer Contract-Signed)
  - Document: ADM Summer Contract-Signed
- ADMYPN (Verification Letter)
  - Document: Verification Letter

Recruiting Categories
In order to facilitate the automatic assignment and completion of checklists, the following recruiting categories are assigned to applicants who meet criteria determined by the campus the applicant is applying to.

AC01: Test Scores required
The AC01 recruiting category is assigned to applicants who are required to submit test scores. It is used on the IU App Checklist/Item Setup page in SIS in order to assign the appropriate test score checklist. It is automatically added when applicants apply using the e-Application based on the following criteria:

- IUPUI: entered for all FYU applicants who are under 19 (age calculation based on start of admit term on application) and all FYU
applicants who graduated less than 6 months from the start of the admit term on the application

- IUPUC: entered for FYU applicants who graduated less than 6 months from the start of the admit term on the application
- IUE: entered for FYU applicants who are under 19 (age calculation based on start of admit term on application) and/or all FYU applicants who graduated less than 6 months from the start of the admit term on the application
- IUK: entered for FYU applicants who are under 21 (age calculation based on start of admit term on application); entered for TRU applicants who are under 21 (age calculation based on start of admit term on application), have reported less than 12 credit hours on the “University or College Information” section of the application, and a college/university GPA of less than 2.0
- IUN: entered for all FYU and TRU applicants if the applicant’s high school graduation date is less than 1 year from the admit term on the application
- IUS: entered for FYU applicants if the applicant’s graduation date is less than 2 years from the admit term on the application or the applicant completed a high school equivalency exam and is less than 19 years old (age calculation based on start of admit term on application)
- IUSB: entered for FYU applicants if the applicant is less than 21 years old (age calculation based on the start of the admit term on the application)

**AC02: High School Transcript NOT Required**

The AC02 recruiting category is assigned to applicants who are not required to submit a high school transcript. If this recruiting category is present when an application posts to SIS, it will result in the completion of the AADMHT checklist item if it is present on the applicant’s checklist. It is automatically added when applicants apply using the e-Application based on the following criteria:

- IUPUI: entered for ICU/TRU applicants who have reported completing 26 or more hours of college coursework (all colleges combined); entered for VSU applicants applying for Spring/Fall and/or their high school graduation date is more than 1 year from the term start and/or colleges have been reported on the application
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- IUPUC: entered for TRU applicants who have reported completing 25 or more hours of college coursework (all colleges combined)
- IUE: entered for TRU applicants who have reported completing 12 or more hours of college coursework (all colleges combined)
- IUK: entered for TRU applicants who have reported completing 12 or more hours of college coursework (all colleges combined); entered for VSU applicants who have reported any college attendance

AC06: College Transcript NOT Required
The AC06 recruiting category is assigned to applicants who are not required to submit a high college transcript. If this recruiting category is present when an application posts to SIS, it will result in the completion of the AADMCT checklist item if it is present on the applicant’s checklist. It is automatically added when applicants apply to IUPUI using the e-Application based on the following criteria:

- BAC Applicants: recruiting category added if the applicant reports that they graduated from IUPUI/IU or that they are a faculty member at IUPUI
- VSU Applicants: recruiting category added if the applicant reports that they have a current/cumulative 2.0 GPA and are eligible to return to their home institution and the applicant is applying for the summer term (4XX5).