Overview

- Prospects are available in SIS to track a student’s interest in a particular school, program, or plan. There are a variety of methods by which a student can be identified. The success of various recruiting efforts may be tracked in SIS. The office must determine its measure for success and to what degree resources are spent entering data to validate their recruiting efforts.

Steps

Performing a Search/Match

1. Navigate to: Campus Community > Personal Information (Student) > Search/Match or Campus Community > Personal Information > Search/Match.

2. Select the Search Type of Person. This field may automatically populate.

3. Select the Search Parameter of IUCC_ONLINE. This field may automatically populate.
   - If the above fields do not automatically populate, you can set your User Defaults. You only need to set the User Defaults one time and then the fields will always populate with the selected defaults.
   - To set User Defaults:
     b. Select the User Defaults 4 tab.
     c. In the Search Type field, select Person from the drop down list.
     d. In the Search Parameter field, click and select IUCC_ONLINE.
     e. Click Save.

4. Click Search.
5. Select the **Search Result Code** of **IUCC_MASK_RSLT**. This field may automatically populate and is based on your security settings.

   - If the above field does **not** automatically populate, you can set your **User Defaults**. You only need to set the User Defaults one time and then the fields will always populate with the selected defaults. If you have already set the user default, proceed to step 6.

   - To set User Defaults:
     a. Click the **User Default** link in the **Search Result Rule** box.
     b. Click ![select IUCC_MASK_RSLT](image).
     c. Click ![OK](image).

6. Proceed with Search/Match as normal. These set up steps will only be required **once** and then will be invoked each time you perform a search/match.

7. Enter the first few letters of the person’s first name in the **First Name Search** field and press the **Tab** key.
8. Enter the person’s last name in the **Last Name Search** field and press the **Tab** key. The **First Name** and **Last Name** fields are typically the most frequently available/used, however with common names additional information is helpful to shorten the list of records returned. It is preferable to perform the search/match starting with narrower criteria and ending with wider criteria.

9. If you know the individual’s **National ID**, perform a search using only the **National ID** field.

10. Click [Search]. You must Tab out of the fields above to enable the **Search** button.
   - If no match is found or you receive too many results, add more information to your search criteria.

11. All potential matches will be returned. Most customers will have multiple entries in the list because they have multiple name types (primary and preferred) in the system. Once you have located the student whose record you want to update, click [Cony ID] to carry the student’s **ID** forward to the page where you need to update information.
   - Click the **Detail** link to view more Bio/Demo information about the student.

**NOTE:** It is critical that an exhaustive search be performed before creating a new record to prevent the creation of duplicate student IDs.

### Search/Match Best Practices

When doing a Search/Match, use the following best practices.

1. If you know the individual’s **National ID** (social security number), perform a search using only the **National ID** field.

2. Perform a broad search in the **First Name** and **Last Name** fields by entering minimal information. Search on the first few letters (3-4 letters) of the first name and the first few letters (3-4 letters) of the last name.

3. Warning! Never do a search using just one letter in the **First Name** or **Last Name** field. It will return tens of thousands of results which can cause database errors and impact all users.

4. Enter as much data as you are provided. Then to avoid an unwanted level either remove a field of data or execute a specific Search level.

5. If the first or last name has characters that could be interpreted in more than one way then either enter up to the point of the discrepancy or enter the possible combinations. For example, enter “Ni” into the **Last Name** field, for a last name of Nichaus or Niehaus when the third character is not clearly written on a paper form.

6. If you have a name and you are not clear which name is the first name and which is the last name; perform the search both ways. For example, suppose you receive a document where “Qian Jian” is entered as the name and you are not sure which name is the first name and which name is the last name. The best practice is to enter “Qian” as the **First Name** in one search and “Jian” as the **First Name** in the second search.
8. If you are given a city that contains a space or other special characters then enter up to but not
including the space or special character or try the possible combinations with or without the space
or special characters. For example with the city of La Porte try LaPorte and La Porte and Laporte
or just La.

9. If an address can be written in more than one way, then enter as much as you’d like to search on.
This is true for other fields as well (e.g. Last Name, City). For example if the address is 420 E 72
St 18K then it could also be 420 E 72nd St #18K.

10. The Search/Match Result page can be used to visually compare data not matched. For example
if there is a match on level 50 and the address was provided then the address can be used to
narrow the records returned on the Search/Match Result page.

   Always use Search/Match before entering a new prospect!

Adding a New Prospect

1. After a search match, and if no results were found, close the Bio/Demo Data window.

2. Click Carry ID Reset in the Search Match Result page.

3. Go to the Prospect Data screen.


5. Click Add a New Value.

6. Enter the Institution and Career.

7. Click Add.

8. This will display the Create/Update Prospects pages.
9. Enter all the data available to you.

**Name Data Entry Conventions:**

- Name Data is case sensitive. Use upper/lower case to enter names.
- In general names should be entered exactly as provided by the person. A standard naming exception to this is, however, that initials should not be followed by a period.
- Include hyphens and apostrophes.
- Search match will return all potential matches, with and without the special characters and spaces.
- First Names:
  - First Name cannot include spaces on initial entry.
  - Initials used for a first name should not be followed by a period. This is a naming standard that should be followed even though a period will not negatively affect Search/Match.
  - First Names with Apostrophes should be entered as they appear.
  - Hyphenated First Names should be entered as they appear.

**Note:** In cases where an apostrophe or hyphen is followed by a lower case character, the name will be flagged on name audit reports to check for potential errors.

- Middle Names:
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- Initials used instead of a middle name should not be followed by a period. This is a naming standard that should be followed even though a period will not negatively affect Search/Match.

- Last Names:
  - Last Names with Apostrophes should be entered as they appear.
  - Hyphenated Last Names should be entered as they appear.
  - Example: Ruiz-Sanchez, Maria Carmen
  - Last Names with Prefixes should be entered as they appear.
  - Last Names with Suffixes: Choose the correct suffix from the drop down list in the suffix field on the bio/demo panel.

- Single Word Names:
  - Single word names must be entered in the format of " ., Name".

10. The **Address Type** should always be Student Home.
11. The Country should be USA.
12. Click **Edit Address** to enter the address.
13. Click **+** under Addresses to add additional address types.
14. In the lower right, enter the phone number.
15. Click **Add** under phone to add more phone numbers.
16. Enter the Non-IU email under Email.
17. Click ![Save](save.png).

18. Click on the Regional page.

19. Click ![Ethnic Group](ethnic_group.png) and select the appropriate Ethnic Group (Black/African American, American Indian/Alaska Native, Asian, Native Hawaiian/Pacific Island, Hispanic/Latino, Other American, White, Refused to Answer, etc.) from the list. Note if a HISPANIC row is present in the grid, the Person is Hispanic or Latino checkbox will show as checked (be selected) upon saving the page.

20. (Optional) If this is the student’s primary ethnicity, click the Primary checkbox to select it.

21. If collected under the two question format, click the IPEDS checkbox to note that. If collected by the one question format, leave this box blank.

22. Upon saving, the Updated On and Updated By information on each row will populate with the date/time of the update and your user information as an audit on the record. The Record Last Updated and Record Last Updated By areas on the screen will also populate with the date/time of the update and your user information as an audit on the record.

23. Click on the Prospect Career Data page.
24. Enter the appropriate information.

- **Admit Term** is a 4-digit number N1N2N3N4 defined as follows:
  - N1 is the current century with 3=1900s and 4=2000s.
  - N2N3 is the year in the century.
  - N4 is the number of the semester with 2=Spring, 5=Summer, and 8=Fall.

- **Admit Type** codes are as follows:
  - BAC = Bachelor's Degree Holder
  - FYU = First-Year Beginner Undergrad
  - HSS = High School Student
  - ICU = Intercampus Transfer Undergrad
  - RTU = Returning Student Undergrad
  - TRU = Transfer Student Undergrad
  - VSU = Visiting Student Undergraduate

- **Referral Source** is the first point of contact made with this prospect. This is very helpful so we can track the population of prospects who are contacting us before we contact them.

25. Click on the *Prospect Program Data* page.

26. Enter the appropriate **Academic Program** and **Academic Plan**. You can use the actual school program choice or the freshman division code that is appropriate.

27. The student will not have an **Application Number** at this time, but if the application is the first point of contact for the prospect, that field will be completed with the subsequent application.

28. Click on the *Prospect School/Recruiting* page.
29. Enter the appropriate school information.

30. If your campus ties recruitment to various regions, enter the appropriate code in Region. The majority of campuses are not using this feature at this time.

31. Recruiting Categories are the easiest way to track a group of students based upon shared trait, such as Core 40, Academic Honors, and Athletes. This holds the most power for grouping students and monitoring their success into application and enrollment.

**Requesting Admissions Materials**

Requesting Admissions Materials (RAM) is a process that allows a prospective student to access recruiting materials on-line, request printed material be mailed to them directly, add themselves to the mailing list for that campus, and ask a question which may not be answered with the on-line resources.

Each IU campus can make available an On-Line Library. This collection of materials will be provided to the prospect and encourage the use of the web resources available on each campus. Each item placed within the on-line library may be made available in three forms: HTML, Adobe Acrobat, and printed materials.

Prospects who visit the materials request page will see a page like this with a graphic header provided by each campus.
1. Click Proceed to see the list of materials available.

2. A prospect who has not found an answer to his/her questions in the list of online materials will be able to ask a question by clicking on Ask a question.
3. The student will fill out a brief questionnaire and place the questions in the comment box. A copy of this will be e-mailed to the designated e-mail.

The information the student provides will go through a nightly Search/Match process and if no match or an exact match is found, the data is posted to the SIS as a prospect. If there is a partial match, the record will be kicked out to a suspense file.

All information provided from the student will be loaded into the system and the appropriate information posted to enable mailings to be sent to students. This will cut down on the amount of data entry each office will have to do.

Each record which has a partial match will be kicked out to a suspense file to be reconciled manually. A report will be processed each night and made available within the SIS to reconcile.

Detailed instructions on the setup, process, and suspense file resolution in the RAM can be found on the SES Training Materials web site at http://ses.iu.edu/campusServices/sisTraining/print_training_materials.cfm

This document is under the Admissions Training Materials heading and is titled “Requesting Admissions Materials”.

Generating Correspondence

Prospect Student data can be attained from the IUIE and used to generate letters to the prospects.

1. In the IUIE, open the Master Catalog.
2. Go to the Student/Admissions/Admissions Data folder.
3. Click on Ltr Gen PDQ – PROS.

4. Enter the parameters and click Run to run the report.