Updating Requirements for an Application

This guide will cover:

- Updating requirements on an individual application.
- Note: For this documentation, we are assuming that the requirements associated with this particular iteration have been met and all data has been entered. The following instructions will demonstrate how to mark each requirement as being completed (received).

Step One

Use the global search to locate the contact record of the applicant.

REMEMBER: You can search for a contact by using the following fields:

- Email (recommended)
- First and last name
- Date of birth
- Mobile number
- Contact street

TIP: Adding an asterisk to the end of a value in the search bar can expand your search if you are unsure of what name a student may have in the system. For example, searching for Matt* will find all records that contain the word “Matt,” including Matthew or Matthews.

Step Two

Once found, click Action then View to access their contact record.

Step Three

Click the Related Information drop-down, then select Applications to add the applications tab.
**Step Four**

The requirement status will display as a progress bar showing the percentage of requirements that have been completed. To see the requirements that are assigned to a particular application (iteration), click the **Action** drop-down button associated with the application then click **View**.

**Step Five**

Using the **Related Information** drop-down, add the **Requirements** tab to the Application Record. The requirements for this application will display.
Step Six
Requirements can be updated individually or mass updated (depending on permissions). Click the button associated with a requirement and then click Edit.

Step Seven
Change the Status from Not Received to Received. Only a status of Received or Waived will count toward a requirements completion.

Step Eight
Click .

Step Nine
Click the hyperlink next to the Application field to navigate back to the actual application record.
**Step Ten**

The requirement status progress bar should update a display a percentage of completion according to the number of requirements that are associated with the application.

![Application Information - ALL](image)

**Step Eleven**

Navigate back to the **Requirements** tab. Repeat Steps 6 through 11 to update the remaining requirements.

**Step Twelve**

If on the Requirements tab, navigate back to the Application tab. The requirement status progress bar should now display as 100% complete.

![Application Information - ALL](image)