How to Quick Admit a Student

This guide will cover:

- How to Perform a Search Match to see if the student exist in the system.
- How to quick admit a student into Catalyst. This process will bypass all admissions process and create an active academic program/plan for the student.
- If it is a new student, how to send a request to ID management to create a M Number and 6+2
- How to Term Activate a student
- How to enter External Education Data.

Step One

Navigate to the following breadcrumb:

Step Two

- Click on the Search Type drop down list and select 'Person'.
- Click on the Magnifying glass next to the Search Parameter field and select 'PSCS_TRADTIONAL'.
- Click Search. The Search Criteria page should load.
Step Three

Search Criteria

Search Type:  Person  Ad Hoc Search

Search Parameter:  PSCS_TRADITIONAL  CS_Person_Traditional

Search Result Code:  PSCS_TRAD_MASIQ, CS_Pars Trational Result Mask

Search Criteria

Search Fields
- Address Line 1
- City
- First Name Search
- Last Name Search
- Date of Birth
- Gender
- National Id

- Click on the magnifying glass next to the search results code field and select 'PSCS_TRAD_MASK'.
- Enter enough search criteria for the Search button to be clickable. Best practice is to enter First Name, Last Name at minimum. If more information is known use the other fields (Date of Birth, Gender, National ID (SSN)) to narrow your search.
- Click Search. The Search Results Page will load.
Step Four

Search Results

Search Type: Person
Search Parameter: PSCS_TRADITIONAL
Search Order Number: 50

Number of ID's Found: 68
Name Only

- Review the search results section to see if the person already exist. If you would like to see more information on the returned students click on the show all columns button to view last four digits of SSN, Month and Day of Date of Birth and M Number (Campus ID).
- If the Person exist in the system write down the EMPLID associated with the student and scroll to the section of this document with the Heading "If Person does exist in the System". If the Person does not exist in the system scroll to the section of this document with the Heading "If Person does not exist in the System".
If Person does not exist in the System

**Step One**

Navigate to the following breadcrumb:

**Step Two**

- Leave the value 'NEW' in the ID field.
- Click in the Academic Institution field, enter UCINN in the field.
- Click on the drop down list next to academic career. Select the appropriate Career for the quick admit.
- Click on the term magnifying glass. Select the admit term for the quick admit student.
- Click on the Add button. The Biographical Details page will load.
Step Three

- Click on the Prefix drop down list and select the appropriate value, if necessary. A list of available values are Dr, Miss, Mr, Mrs and Ms.
- Click in the first name field. Enter the first name.
- Click in the middle name field, Enter the middle name if one exist.
- Click in the Last name field. Enter the last name.
- Click on the Suffix drop down list and select the appropriate value, if necessary. A list of available values are II, III, IV, Junior, MD, Senior and V.
- Click on the Date of Birth. Enter the Birth Date in the field. You can enter the date without the '/'. When the page is saved the system will format the date as mm/dd/yyyy.

Step Four

- Click on the Marital Status drop down list and select the appropriate value. The list of available values are Common Law, Divorced, Domestic Partnership, Head of Household, Married, Single, Separated, Unknown and Widowed
- Click on the Gender drop down list and select the appropriate value. The list of available values are Male, Female and Unknown.
Step Five

- Click in the National ID field. Enter the Social Security Number. You can enter the value with the '-'s. When the page is saved the '-'s will be inserted.
- Make sure the Country value is USA and National ID Type is Social Security Number. These should be the default values.

Step Six

- Click on the Type drop down list and select the appropriate value. The list of available values are Business, Campus, Cell, Home and Other.
- Click in the Phone field and enter the phone including area code. Please use the following format "area code/xxx-xxxx".
- If more than one phone number needs to be entered click on the Add button to add a new row and repeat the steps above. You can not have two phone numbers with the same Phone Type.
- If more than one phone number is listed, check the box next to the one that is the preferred phone. One phone number must be checked as preferred.

Step Seven

- Click on the Type drop down list and select the appropriate value. The list of available values are Business, Campus, Home and Other. The UC email address should be listed under the Campus Email address type.
- Click in the Email address field and enter the email address.
- If more than one email address needs to be entered click on the Add button to add a new row and repeat the steps above. You can not have two email addresses with the same Email Type.
- If more than email address is listed, check the box next to the campus email address (UC email) that is preferred, if it exist. If it does not exist check the preferred checkbox next to one of the
existing email addresses. One email must be checked as preferred. The preferred email will automatically change to the student's UC email address once one has been assigned.

**Step Eight**

- Click on the Addresses Type drop down list and select the appropriate value. The list of available values are Billing, Business, Campus, Check, Diploma Mailing, Home, Mailing, Other 2, Permanent and Residence Hall.
- Click on the Status drop down list. Select Active from the list of available values. Active should be the default value.
- If the address is not a USA address click on the magnifying glass next to the country field. Select the appropriate value from the list of countries.
- Click on the Edit Address link.

**Edit Address**

- Enter the Address in the available fields. If a country other than USA was selected, the available fields may differ.
- Click the OK button. The Biographical Details Tab will load.
- If another address type needs to be entered for different address type click on the plus sign next to the effective date to add a new row and repeat the steps above.
Step Eight – continued

- Click on the Citizenship link, under the Email field

![Email](image)

- In the Country field, enter USA

![Citizenship Detail](image)

- In the Citizenship Status field, enter Citizen or Other (Non US) based on the information provided by the student on the Basic Data Form.
- Click OK.

Step Nine

- Click on the Regional Tab located at the top of the page. The Regional page should load.
If the person is Hispanic or Latino check the box next to the statement "Person is Hispanic or Latino" and then Click on the drop down list next to 'If Yes, Select Ethnic Group" and select the appropriate value. The list of available values are Argentinian, Central American, Colombian, Cuban, Dominican, Hispanic/Latino, "Mexican-Amer, Mexican, Chicano", Other-Hispanic, Peruvian, Puerto Rican, South American, Spanish. Once selected the Ethnic Group will be loaded into the grid below.

If the person is not Hispanic or Latino, click on the Regulatory Region magnifying glass and select USA. Click on the Ethnic Group magnifying glass and select the NOTHISPANIC value from the list.

If the Student did not identify whether he was Hispanic or Latino or not on the Basic Data Form do not add the NOTHISPANIC row.

Click on the Add button to add a new Ethnicity row.

Click on the Regulatory Region magnifying glass and select USA. Click on the Magnifying glass next to the Ethnic Group field and select the Ethnic Group identified on the Basic Data Form.

If the person has more than one ethnicity, click on the Add button to add a new row and enter in the necessary data.

Click on the Program/Plan Tab. The Program and Plan Page should load.
Step Ten

- Click on the magnifying glass next to the Academic Program field. Select the desired value from the list. The only appropriate values are 40UOP, 40GUOP, 28UOP and 34UOP.
- Click on the magnifying glass next to the Campus field. Select the desired value from the list. This value will default based on the Academic Program selected.
- Click on the magnifying glass next to the Academic Plan field. Select the desired value from the list based on what was identified on the Basic Date Form.
- If the Admit term value needs to be changed click on the magnifying glass next to the Admit Term field. Select the desired value from the list. This value defaulted from step 2.
- If the Requirement term value needs to be changed click on the magnifying glass next to the Requirement Term field. Select the desired value from the list. This value defaults based on the value select for term in Step 2 and should match the admit term.
- Leave the Expected Graduation Term field blank.
- Click on the Residency Link. The Residency Official page will load.
Step Eleven

Residency Official

• Click on the effective term magnifying glass. Select the desired value from the list.
• Click on the Residency drop down list and select the desired value from the available list. Only select OH - Ohio Residency for Tuition or NR - Non Resident for Tuition. Notice the left hand column of the Residency Details section gets populated with the selected value.
• Click on the calendar next to the Residency Date field. Select the start date of the term entered in the Effective Term field.
• Click OK.
• Click the Save button at the bottom of the page. Notice an EMPLID as been assigned to the student. Write this Number on the Basic Data Form.
Step Twelve

- Click on the Related Content link located in the top right hand corner of the page and select UC Quick Admit IDM. A secondary window will open to the right of the Biographical Detail tab. Expand the window to make it bigger.

Step Thirteen

- Click on the Submit Button. A request is be sent to ID Management to generate an M Number and 6+2.
- Once the request is completed a results section will appear displaying the students M Number and 6+2. If an email was provided on the Basic Date Form and entered into the system, an email will be sent to the student with the M Number and 6+2. If an email address was not provided you will need to contact the student and provide him/her with their M Number and 6+2 as well as directions on setting a password.
- Scroll down to the section in this document labeled "Entering and Reviewing External Education"
If Person does exist in the System

**Step One**

Navigate to the following breadcrumb:

**Step Two**

- Prior to creating a new Student Program/Plan stack we need to review the existing stacks to see if the student is already in an Open Enrollment Program.
- Click in the ID field and enter the EMPLID written down from the Search Match process.
- Click on the Search Button. Review the results returned to see if the student is already in a Open Enrollment Program associated with the correct college. You will have to click on the links in the search results section to see if the student is still active. If they are proceed to step 6. If they are not write down the last student career number associated with the career you will be creating a stack for, click return to search and proceed to step 3.
Step Three

Student Program/Plan

- Click on the Add a New Value tab.
- Click in the ID field and enter the EMPLID written down from the Search Match process.
- Click on the Academic Career drop down list and select the appropriate Academic Career.
- Click in the Student Career Nbr field and enter the next sequential student career number associated with the career.
- Click the Add button. The Student Program Tab will load.

Step Four

- Click on the magnifying glass next to the program action field and select 'ACTV'.
Click on the magnifying glass next to the Academic Program Tab and select the appropriate Open Enrollment Program. The only appropriate values are 40UOP, 40GUOP, 28UOP and 34UOP.

Click on the magnifying glass next to the Admit Term field and select the admit term of the Open Enrollment Program. The Requirement Term will default to the Admit Term.

Click on the Student Plan Tab.

**Step Five**

Click on the magnifying glass next to the Academic Plan field and select the appropriate academic plan from the list of available values.

The Requirement Term will default to the Requirement term from the Student Program Tab.

Click on the Save Button.

**Step Six**

Navigate to the following breadcrumb:
Step Seven

**Term Activate a Student**
Enter any information you have and click Search. Leave fields blank for a list of all values.

![Search Criteria](image)

- Click in the ID field and enter the EMPLID of the student.
- Click on the Search Button. The Term Activation Tab will load.

Step Eight

- Navigate to the correct career by using the arrows located in the top right hand section of the page.
- Once the appropriate career has been identified click on the plus sign to add a new term row.
- Click on the magnifying glass next to the Term field and select the appropriate term. This term should be the term the student will be enrolling.
- Click on the magnifying glass next to the Student Career Nbr field. Select the Student Career Number associated with the Active Open Enrollment Program just created.
- Click on the Save Button. Proceed to the section in this document labeled "Entering and Reviewing External Education"
Entering and Reviewing External Education

Step One

Navigate to the following breadcrumb:

Step Two

- Click in the ID field and Enter the EMPLID of the Open Enrollment Program Student.
- Click on the Search Button. The External Education Tab will load.
Step Three

- If the student previously existed in the system review the information on the External Education tab to make sure it matches the data on the Basic Data Form.
- The Ohio Board of Education requires the University to enter the High School attended by the student. If the student is new and no previous data exist click on the magnifying glass next to the External Org ID field.

  ![Catalyst Interface](image)

- Use the Search Parameters section to search for the school entered on the Basic Data Form.
- Click on the Description condition drop down list and change it from "begins with" to "contains".
Click in the Description field and enter a part of the school name.
Click on the magnifying glass next to Organization Type and select "SCHL" from the list of available values.
Click in the State field and enter the State Abbreviation.
Click Look up once the parameters have been entered and select the correct value from the search results section.
For all Foreign High School use External Org ID 20000019.

**Step Four**

- Click on the Career Drop down list and select High Schl
- Click in the To Date drop down field and enter the completion date of the high school diploma. If student has not graduate enter the expected graduation date. If month and day are unknown use 06/01/YYYY.
- Click on the Action drop down list and select "Desired".
- Verify Transcript Date is Today's Date
- Click on the Courses and Degrees Tab.
Step Five

- In the External Course Defaults section, click on the External Career Drop down list and select "High Schl".
- In the External Course Defaults section, click on the Data Source and select Self-Rpted.
- In the External Degree Section, click on the magnifying glass next to Degree field and select "HS" if the student has completed their HS diploma. If diploma has not been completed leave the value blank along with the next two items.
- Click in the Degree Date field and enter the Date the degree was completed. If month and day are unknown use 06/01/YYYY.
- Click on the Data Source Drop down list and select "Self-Rpted".
- Click on the Save button. If a College record needs to be added click on the External Education tab and Proceed to the next step. If no college record needs to be added you have completed the steps of Quick Admitting a student.
Step Six

- Click on the Plus Sign located on the right hand side of the Career Data section. A new row will be added.
- Click on the magnifying glass next to the External Org ID field.

- Use the Search Parameters section to search for the school entered on the Basic Data Form.
- Click on the Description condition drop down list and change it from "begins with" to "contains".
- Click in the Description field and enter a part of the school name.
Click on the magnifying glass next to Organization Type and select "SCHL" from the list of available values.

Click in the State field and enter the State Abbreviation.

Click Look up once the parameters have been entered and select the correct value from the search results section.

**Step Seven**

Click on the Career Drop down list and select the credit level (Undergrad, Graduate, Law, Medical) studied by the student.

Click in the To Date drop down field and enter the completion date of the degree or when the student stopped taking classes. If student has not graduated enter the expected graduation date. If month and day are unknown use 05/01/YYYY.

Click on the Action drop down list and select "Desired".

Verify Transcript Date is Today's Date

Click on the Courses and Degrees Tab.
Step Eight

- In the External Course Defaults section, click on the External Career Drop down list and select career entered on the External Education tab.
- In the External Course Defaults section, click on the Data Source and select Self-Rpted.
- In the External Degree Section, click on the magnifying glass next to Degree field and select the appropriate degree. If a Bachelors degree was earned but your not sure of the type use the BX (Bachelor Undetermined) value. If degree has not been completed leave the value blank along with the next two items.
- Click in the Degree Date field and enter the Date the degree was completed. If month and day are unknown use 05/01/YYYY.
- Click on the Data Source Drop down list and select "Self-Rpted".
- To add another degree earned from the same college click on the plus sign at the end of the degree row and enter the degree, degree date and data source.
- Click on the Save button.
- To add additional colleges repeat steps 6-8.

You have now completed the steps of Quick Admitting a Student in Catalyst.