



Campus Solutions
Student Admissions

Application Entry

Business Process Guide

May 2016

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Overview & Process Summary

This business process guide (BPG) is intended to be used for creating a new person record and creating an application for admission in Campus Solutions 9.0. The process described in this BPG is to handle one off manual creations of just a person and application record, such as visiting students.

Business Process Requirements

The user must be able to access the components in this BPG. The user must also not have national id or date of birth masked. **Note:** Masked data will prevent your ability to save a component in which those data elements appear (e.g. Add/Update A Person).

Process Steps, Roles and Responsibilities

Prerequisites for the business process steps included in this BPG are:

PREREQUISITES	PRIMARY RESPONSIBILITY	TIMING
Setup Search/Match	Office of the Registrar	Initial setup changed only when new search/match rules are created/needed.
Configure Campus Community biographic and demographic values	Office of the Registrar	Initial setup changed only when new values are needed, after approval from the Campus Community Governance committee.
Configure Recruiting and Admissions values	Office of Undergraduate Admissions, or Graduate Division	Initial setup changed only when new values are needed.

Where the Data for This Process Comes From

Persons and applications are created two ways, in batch (most common) or manually.

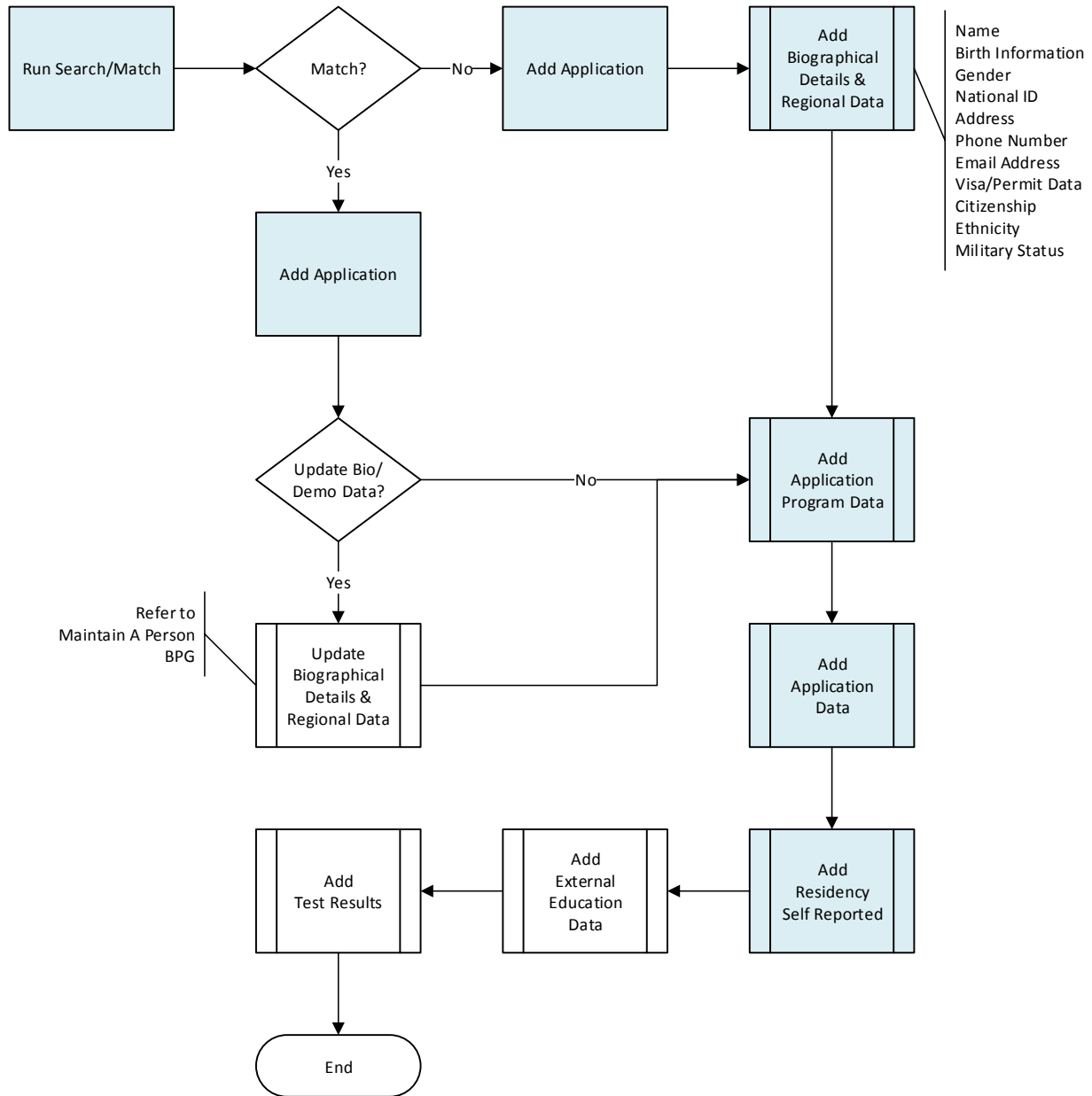
Prerequisites and Assumptions

PREREQUISITE/ASSUMPTION	DETAIL
Most person records will be created in batch.	The need to manually create a person should only be done when they do not fall within a defined business process.

Key Definitions

TERM/ACRONYM	DEFINITION
EMPLID	A Campus Solutions assigned Employee ID number is the key to most tables in CS. Also known as a Student ID (SID) number. NOTE: This is not the same as an EmployeeID number in HCM.
Bio/Demo Data	Biographical/demographic data that identifies a person, such as: name, birth date, gender, citizenship, ethnicity, address, and phone number.
National ID	In the US, it is the Social Security Number (SSN) or Individual Taxpayer ID Number (ITIN)
Search/Match	Search/Match examines all records in the database, to help avoid possible duplicates.

Business Process Flow Chart



Note: Shaded processes are including in this BPG.

Business Process Steps and Details

Note: If you are adding an application to an existing person, skip to the **Adding an Application** section. If you need to update Bio/Demo data on an existing person, please refer to the Maintaining a Person BPG.

Conducting Search/Match

Search/Match searches the Campus Solutions database for a particular person based upon key search values. The search parameter specifies the data elements to be searched, and the search order (or confidence level) for a particular match. **Note:** Search/Match **must** be performed before adding a new person, to prevent duplicates.

Search/Match

Student Admissions > Application Entry > Search/Match

Search/Match
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Use Saved Search: [dropdown]

Search Type: [=] [dropdown]

Search Parameter: [begins with] [dropdown] [magnifying glass icon]

Ad Hoc Search

Description: [begins with] [dropdown]

Search Clear Basic Search Save Search Criteria Delete Saved Search

Step 1 Select **Person** from the *Search Type* drop down.

Step 2 Select **UC_SEARCHMATCH** from the *Search Parameter* lookup prompt.

Note: You can save this search configuration by clicking the **Save Search Criteria** link.

[Search/Match](#)

Save Search As

Name the search and then click Save.

Name of Search: [UC Search/Match]

The saved search will contain these values:

Search Type: = Person
Search Parameter: begins with UC_SEARCHMATCH
Ad Hoc Search
Description: begins with

Save Return to Advanced Search

The Save Search As page is displayed.
Enter **UC Search/Match** in the *Name of Search* field.
Click **Save** button.
Click **Return to Advanced Search** link.
The Search/Match Search Criteria page is displayed.

Warning! Do not check the *Ad Hoc Search* checkbox. This will override the search/match parameters.

Step 3 Click **Search** button.

Entering Search Criteria

Based upon the *Search Parameter* selected, the appropriate search fields will display. The data entered into these search fields will be used to search for a potential match in Campus Solutions.

Screen continued on another page.

Step 1 Select **UC_RESULTS** from the *Search Result Code* lookup prompt.

Note: You can save this setting by clicking on the **User Default** link.

The Search Criteria page is displayed
 Select **UC_RESULTS** from the lookup.
 Click **Ok** button.
 The Search Criteria page is displayed.

Enter all of the available data completely to perform the most comprehensive search/match.

Tip: Use wildcards to search. To search for one unknown value, use the underscore (**_**) symbol. For example, RODRI_UEZ. To search for more than one value, use the percent (**%**) symbol. For example, BEN%.

Step 2a Enter **Last Name** into *Last Name Search* field. A last name is required to conduct a search. This field will automatically capitalize and sanitize the input.

- Step 2b** Enter **First Name** into *First Name Search* field. This field will automatically capitalize and normalize (remove punctuation, accent marks, and spaces) the input.
- Step 2c** Enter **Social Security Number** or **Individual Taxpayer Identification Number** in the *National Id* field in 99999999 format, do not include hyphens.
- Step 2d** Enter **Date of Birth** into *Date of Birth* field as MM/DD/YYYY.
- Step 2e** Enter **Gender** into *Gender* field as M (Male), F (Female), or U (Decline to State).
- Warning!** Do not use **Selective Search** buttons. These buttons do not perform the full search process using all search/match parameters (see screen shot on next page).
- Step 3** Click **Search** button at top of page.

Search/Match Parameters

The Search/Match parameters section of the Search Criteria page displays the search order used. The order starts with the lowest number, which has the highest confidence level. The description lists the fields in which search data attempts to match. Note: The **Selective Search** buttons would limit the search to only that specific search rule. This is never recommended.

Search by Order Number		
Search Order	Description	
10	Name,NID,DOB,Gender	Selective Search
11	Name,NID,DOB	Selective Search
12	Name,NID	Selective Search
20	LastName,NID,DOB	Selective Search
21	FirstName,NID,DOB	Selective Search
30	LastName,NID	Selective Search
40	NID,DOB	Selective Search
50	NID Only	Selective Search
60	Name,DOB,Gender	Selective Search
61	LastName,DOB,Gender	Selective Search

DISPLAY OF SEARCH RESULTS

The result grid displays any potential matches at the lowest search order. Additional data elements may be displayed.

Number of ID's Found is a unique count of EMPLIDs in the result grid. This number may not match the number of rows in the result grid due to multiple name types, effective dated rows in the result set.

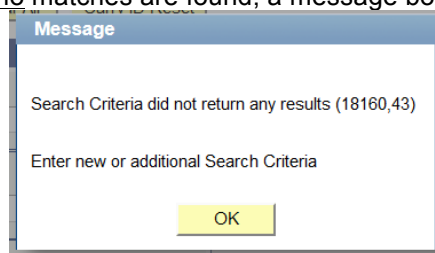
Search Order Number is the lowest search order number (highest confidence level) of the returned in the result grid. Search/Match will stop searching once it finds at least one match at the lowest search order number. The description of the search order is also displayed, informing you of what data points the match was made on.

The screenshot shows the 'Search Results' page. At the top, it displays search criteria: Search Type: Person, Search Parameter: UC_SEARCHMATCH, and Result Code: UC_RESULTS. There is a 'Search Results Summary' section with 'Number of ID's Found: 1' and 'Search Order Number: 10'. Below this is a table with columns: Results, Results2, Additional Information, Empl ID, Last Name, First Name, Middle Name, Date of Birth, and National ID. The first row shows a result with 'Carry ID' highlighted in a blue box, and a 'Detail' link next to it.

Results	Results2	Additional Information	Empl ID	Last Name	First Name	Middle Name	Date of Birth	National ID
1	Carry ID	Detail	3030000001	Rodriguez	Bender	Bending	05/05/1995	775551212

Tip: If too many or not enough ID's are returned in the result grid, use the **Return to Search Criteria** link and add/remove parts of the search criteria. Try using the first 3-5 characters of the first and last name.

Note: If no matches are found, a message box will display.



Step 1 In the case of a match, click the **Carry ID** button to select the EMPLID(SID) and then navigate to the appropriate page.

Tip: The **Detail** link will open up a new tab/window to Add/Update a Person for that ID.

Adding an Application

When no match is found, you will need to add a new person to the system. In most cases, person records are created in batch through other processes (e.g. Application for Admission, Prospect Intake Card, HR, etc.); however, there are situations when a person will need to be added manually.

Note: To prevent duplicates, each person entered into the system should minimally have:

- First and Last Legal Name
- Date of Birth
- At least one form of Contact Information
 - Address, Phone Number, Email Address

Additionally, the following data elements should be added, when available, to prevent duplicates and further define a person.

- Gender
- National ID Number

Note: Fields that are not addressed in this BPG should be left blank, or with the default value. They are not required for this business process.

Add Application

Student Admissions > Application Entry > Add Application

Warning! Do not overwrite the Application Nbr value **00000000**. Overwriting the **00000000** will cause problems with the automatic assignment of the next available ID number. If you accidentally erase it, or type over it, do not retype **00000000**; leave the page and start over.

Step 1 If you are creating a new person, in addition to the application, do not change the value **NEW** value in the ID field.

Warning! Do not overwrite the ID value **NEW**. Overwriting **NEW** will cause problems with the automatic assignment of the next available ID number. If you accidentally erase it, or type over it, do not retype **NEW**; leave the page and start over instead.

Step 2 Select **UCB01** from the *Academic Institution* lookup prompt.

Step 3 Select the *Academic Career* from the lookup prompt.

Note An application's career cannot be changed once you press the Add button.

Step 4 Click the **Add** button.

Biographical Details

When adding a new person and using system-generated IDs (recommended), the field at the top of the page displays the value NEW until you save the record. When you access the record after having saved it, the field displays the ID that the system assigned to this individual.

Student Admissions > Application Entry > Add Application > Biographical Details

Biographical Details
Regional
Application Program Data
Application Data
Application School/Recruiting

NEW

Person Information

Effective Date: BY

*Format Using: English [Change Format](#)

Prefix:

First Name: Middle Name:

Last Name:

Suffix:

Date of Birth: BY Birth Information Campus ID:

Biographical History Find | View All First 1 of 1 Last

*Effective Date: BY [+](#) [-](#)

*Marital Status: As of: BY

*Gender:

National ID Personalize | Find | [?](#) [?](#) First 1 of 1 Last

*Country	*National ID Type	National ID	Primary
USA <input type="text"/>	Social Security Number <input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

[Add](#)

Contact Information

Addresses Find | View All First 1 of 1 Last

*Address Type:

Effective Date: BY [+](#) [-](#)

*Status:

Country:

Address: [Edit Address](#)

Phone

*Type	*Phone	Ext	Country	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

[Add](#)

Email

*Type	*Email Address	Preferred
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

[Add](#)


[Save](#) [Notify](#) [Refresh](#) [Add](#)


PERSON INFORMATION

- Step 1** Enter **First Name**, **Middle Name**, **Last Name**, and select a *Suffix* (if needed).
- Notes:** Data, including names, should be entered using mixed or proper case, unless otherwise noted. When adding a new person, you only have the option to add a **Primary** name type. The **Preferred** name type will be automatically added on initial save. If you need to add additional name types, you will need to add them after the initial save.
- Step 2** Enter **Date of Birth** in MM/DD/YYYY format.
- Tip:** Save keystrokes. Dates can be input without punctuation, for example **07012015**. Campus Solutions will automatically reformat it with the “/” marks (**07/01/2015**) when leaving the field or saving the record.
- Step 3** Click on **Birth Information** link.
- Step 4** The Birth Information Detail page will display.

Birth Information Detail

Birth Location:

Birth Country: 

Birth State: 

- Step 5** Enter a **Birth Location**, and select a *Birth Country* and *Birth State* from the lookup prompt (if applicable).
- Step 6** Click **OK** button.
- Step 7** You will be returned to the Biographical Details page.
- Step 8** Select a *Gender* from the drop down. Defaults to **Decline**.

NATIONAL ID

- Note:** The *Country* will automatically default to **USA**. Do not change this. UC Berkeley is not collecting National IDs for other countries.
- Step 1** Select *Social Security Number* or *Individual Taxpayer ID Number* from the drop down.
- Step 2** Enter the **SSN** or **ITIN** number into the *National ID* field.
- Step 3** Check the **Primary** checkbox.
- Notes:** Only enter an SSN or ITIN if the person has one, otherwise leave it blank. Campus Solutions will automatically display XXX-XX-XXXX after the initial save.
- A person should only have a SSN or an ITIN, not both or multiples of either.

CONTACT INFORMATION

Step 1 Select an *Address Type* from the drop down.

VALUE	DEFINITION
Home	Default. Applicant's permanent address.
Local	Applicant's local or mailing address.

Step 2 Select a *Country* from the lookup prompt, if not USA.

Note: The address format will be displayed specific to the country's address configuration. Some countries, such as Belgium, The Netherlands, and Spain have a different address format.

Step 3 Click **Edit Address** link.

Step 4 The Edit Address page will display.

[Edit Address](#)

Country: United States [Change Country](#) [Address Search](#)

Address 1:

Address 2:

Address 3:

City: State: Zip

County: Code:

Step 5 Enter **Address 1**, **Address 2** (if needed), **City**, **Postal**. Enter or select a **State** from the lookup prompt. Enter **County** (if known), this field is optional.

Tip: The values in the City, State, and Postal fields are validated against US Postal Service data. If you enter a partial set of values in those fields (e.g. just a City and State) and then click the **Address Search** link, the system will either fill in the missing data if there's only one possibility, or display a list of matching values to select from.

Step 6 Click **OK** button.

Note: Additional address types can be added by clicking the **[+]** button.

Step 7 You will be returned to the Biographical Details page.

Step 8 Select the appropriate *Phone Type* from the drop down.

VALUE	DEFINITION
Home/Perm	Default. Applicant's main phone number.
Local	Applicant's local phone number.
Mobile	Applicant's cellular phone number.

Step 9 Enter **Phone**, and **Extension** (if needed).

Step 10 Click **Preferred** checkbox.

Notes: Additional phone numbers can be added by clicking the **Add** button.

If entering more than one phone number or email, at least one needs to be marked **Preferred**.

Step 11 Select **Other Email Type** from the drop down.

Step 12 Enter **Email Address**.

Step 13 Click **Preferred** checkbox.

VISA/PERMIT DATA (SKIP FOR US CITIZENS)

Note: This section is only required if the applicant is international, or has a visa indicated on the application.

Step 1 Click on **Visa/Permit Data** link at the bottom of the Biographical Details tab.

Step 2 The Visa/Permit Data page will appear.

Step 3 Select **USA** from the *Country* lookup prompt.

Step 4 Select the appropriate **Visa** from the *Type* lookup prompt.

Step 5 Click **OK** button, to be returned to the Biographical Information page.

CITIZENSHIP

Step 1 Click on **Citizenship** link at the bottom of the Biographical Details tab.

Step 2 The Citizenship Detail page will appear.

Step 3 Select **USA** from the *Country* lookup prompt.

Step 4 Select the appropriate value from the *Citizenship Status* dropdown. (e.g. **Native** for US Citizen, **Alien Temporary** for international applicants)

Step 5 Click the **[+]** button to add an additional citizenship row for international applicants.

Step 6 Select the appropriate (non-USA) value from the *Country* lookup prompt.

Note: Citizenship Status for non-USA countries are not collected, even if an option is available.

Step 7 Click the **OK** button, be returned to the Biographical Information page

Regional

Student Admissions > Application Entry > Add Application > Regional

Biographical Details | **Regional** | Application Program Data | Application Data | Application School/Recruiting

NEW

USA

Ethnicity

Person is Hispanic or Latino If Yes, Select Ethnic Group

Personalize | Find | First 1 of 1 Last

*Regulatory Region	*Ethnic Group	Description	Ethnic Category	Primary	IPEDS	Percentage
USA				<input type="checkbox"/>	<input type="checkbox"/>	

Add

History Find | View All First 1 of 1 Last

*Effective Date: 05/03/2016 Military Status:

Disabled Disabled Veteran VA Benefit

Save Notify Refresh Add

ETHNICITY

- Step 1** Click on the **Regional** tab.
- Step 2** The Regional page is displayed.
- Step 3** Click the **Person is Hispanic or Latino** checkbox (if needed).
- Note:** If you select the checkbox in step 3, you will need to select appropriate the *Ethnic Group* from the dropdown. The system should automatically add the *Ethnic Group* in Step 4.
- Step 4** Select **USA** from the *Regulatory Region* lookup prompt.
- Step 5** Select the appropriate **Ethnic Group** from the *Ethnic Group* lookup prompt.
- Note:** Additional ethnic groups can be added by clicking the **Add** button.
Do not populate the Primary, IPEDS or Percentage fields.

HISTORY

- Step 1** Select the appropriate *Military Status* from the drop down (if needed).
- Note:** Do not populate the Disabled, Disabled Veteran, or VA Benefit checkboxes.

Application Program Data

Student Admissions > Application Entry > Add Application > Application Program Data

The screenshot displays the 'Application Program Data' form. At the top, there are tabs for 'Biographical Details', 'Regional', 'Application Program Data' (selected), 'Application Data', 'Application School/Recruiting', and 'Additional Details'. The form is labeled 'NEW'. Key fields include 'Academic Institution: UC Berkeley', 'Academic Career: Undergraduate', and 'Application Number: 00000000'. The 'Program Data' section contains fields for 'Program Number: 0', '*Effective Date: 05/03/2016', '*Admit Term', '*Academic Program', '*Academic Load: Full-Time', and '*Campus'. The 'Program Status' section shows 'Status: Applicant', 'Action Date: 05/03/2016', '*Program Action: APPL Application', and 'Action Reason'. The 'Plan Data' section has '*Academic Plan' and 'Sub-Plan Data' with '*Sub-Plan'. At the bottom, there is a 'Transfer To: Education' dropdown, a 'Go' button, and 'Save', 'Notify', 'Refresh', and 'Add' buttons.

PROGRAM DATA

Step 1 Click the **Application Program Data** tab.

Step 2 The Application Program Data page displays.

Step 3 Select the *Admit Term* from the lookup prompt.

Step 4 Select the *Academic Program* from the lookup prompt.

Note: Academic Program is a categorization value depending on the Academic Career. For example, the undergraduate career is based on UCB's colleges. Graduate and Law career use Academic, Professional, and Self Supporting options.

Graduate Concurrent Degree Programs (CDP) that are in multiple Academic Plans will be added using Student Admissions > Application Maintenance > Program Addition after the initial application is saved.

Warning! Do not try to add any additional program actions on this page. Adding a new row will increment the Application Program Number, which cannot be deleted. To process this application (Admit, Deny, Waitlist), use the Application Maintenance page.

Step 5 Select an option from the *Action Reason* lookup prompt, if needed. This field is used to give additional details as to why the Program Action was used, e.g. exception, waitlist.

Step 6 Select an *Academic Plan* from the lookup prompt. NOTE: Only active plans for the Admit Term display. If the Plan has a future admit term, or a last admit term populated in configuration, you will not see the plan.

Step 7 To add an additional plan (e.g. concurrent degree program in the same Academic Program), click the **[+]** button on this row to add an additional Academic Plan value.

Application Data

Student Admissions > Application Entry > Add Application > Application Data

- Step 1** Click the **Application Data** tab.
- Step 2** The Application Data page is displayed.
- Step 3** Select the *Application Center* from the lookup prompt. This is generally the office that owns the application, e.g. GRAD for Graduate Division, UGRD for Office of Undergraduate Admissions, RECS for Office of the Registrar.
- Step 4** Select the *Admit Type* from the lookup prompt.

VALUE	DEFINITION
FYR	First Year, first time applicant to career at UC Berkeley.
TRN	Transfer, applying to UC Berkeley from another school at the same career level.
EAP	Education Abroad Program (EAP) applicant.
NON	Non-degree/Coursework only applicant.
ADL	Additional Degree, applicant applying for an additional degree at UC Berkeley in the same career level (e.g. Second Bachelors).

- Step 5** For Undergraduate Career: Select an *Academic Level* from the dropdown, if applicable.
- Step 6** Check the *Previous Attendance* checkbox if the applicant indicates they have attended UC Berkeley previously (at any career).
- Step 7** For Graduate Career: Click the **Additional Fields** link.
- Step 8** The Additional Fields page is displayed.

Additional Fields

Empl ID:	NEW	
Academic Career:	GRAD	Graduate
Application Number:	00000000	

Applicant Rank:

- Step 9** Enter the *Applicant Rank*.
- Step 10** Click the **OK** button.
- Step 11** You will be returned to the Application Data page.
- Step 12** In the *File Information* section, enter the appropriate system's applicant ID number (e.g. CPID, Jazzee ID, Haas Tracker ID) in the *External Application Nbr* field.
- Step 13** Click **Save** button.
- Step 14** The record is saved. The EMPLID (SID) and Application Number have been assigned.