

# Sharing Supplemental Requirements with PharmCAS Applicants

WebAdMIT's **Requirements** feature allows you to create and track a checklist of supplemental requirements for each applicant. Supplemental requirements include items such as fees and documents and are tracked on a fulfilled or not fulfilled basis.

Historically, admissions users would export the status of requirements using the **Requirement's** feature, and then share this information with applicants via email. However, as part of the transition to the 3.X platform, you can now share the status of supplemental requirements with applicants using our **Enrollment Marketing Platform (EMP)**, which provides you with a more efficient way of communicating with applicants.

## *What's unaffected with this new process?*

As in previous cycles, you will continue to configure supplemental requirements using WebAdMIT's **Requirements** feature and then you'll generate an export that contains the information to be shared with applicants.

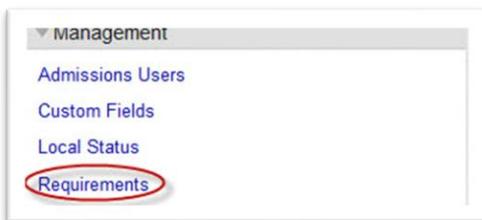
## *What's changing with this new process?*

After generating your export, you'll use WebAdMIT's **Export API** to send that data to the PharmCAS EMP. WebAdMIT's **Export API** allows for WebAdMIT to automate exports to be processed by other applications. As a WebAdMIT user you will provide the WebAdMIT support team with your API key and the name of your export. WebAdMIT support and the EMP team will setup a nightly, automated export to EMP. Once the data is processed in EMP, applicants will receive personalized email notifications each time a requirement's status changes; these emails will contain a direct link to that applicant's status page.

The following three steps help you setup the process.

## Step 1: Create Requirements

1. Using the Menu Bar, open the Management panel, then click **Requirements**.



2. Click **New Requirement**.



- Begin by creating a new requirement category. Enter a name, select the programs associated with this requirement, then click **Submit**.

### New Requirement

Name

**Programs**

PharmD

- Click the **add criterion** link to add criterion to the requirement.

Application fee		✎ ✖ <b>add criterion</b>
☰	Details	
☰	\$75 Received	✎ ✖

- Enter a description for the new criterion, then click **Submit**. If applicable, enter a due date and indicate if you want to use comments and/or notes. If you choose to use comments, you can create a list of preset comments that the user can select from, and you can select a default value. Note that if you later change the default value, it will only affect new applicants.

#### Application Fee: \$75 Received

Description

Due Date

Use comments

Use notes

Use default comment

Comment	Default Value	
<input type="text" value="Pending"/>	<input type="radio"/>	✖
<input type="text" value="Received"/>	<input checked="" type="radio"/>	✖

Once requirements have been configured, you can work with them in the Requirements panel on the Applicant Details page, as well as in Lists, Searches, or via the Clipboard.

## Step 2: Build Your Export

Using the Export Manager, build an export that contains the requirements you want to share with applicants. These requirements will be exported to EMP using WebAdMIT's export API (Step 3).

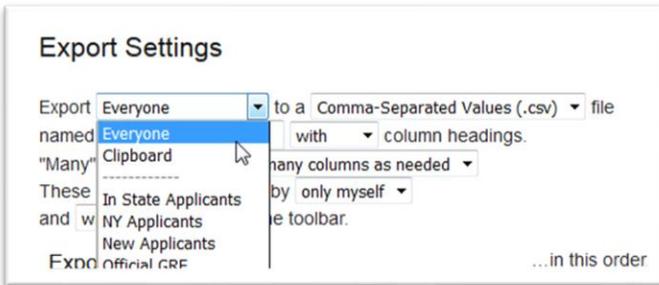
1. Using the Menu Bar, open the Reports & Exports panel, then click **Export Manager**.



2. Click **New Export**.



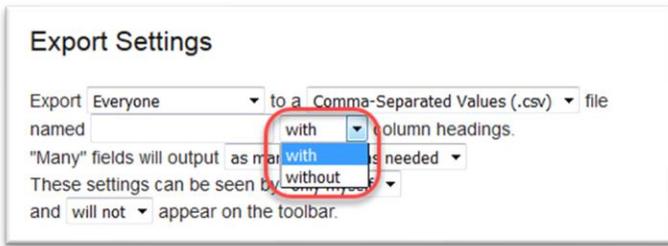
3. Select **everyone** to export.



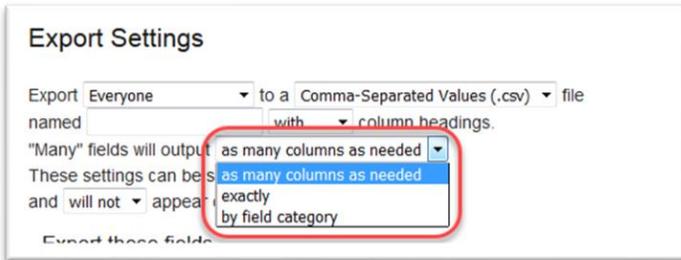
4. Select an export type of **.csv**



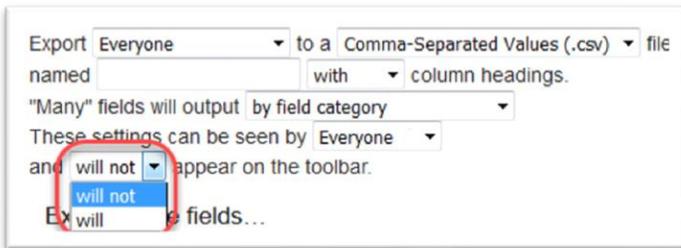
5. Enter **Sharing Supplemental Requirements** as a name.
6. Select **with** to include column headings (column headings are names of the fields you select for the export).



7. Select **as many columns as needed**.

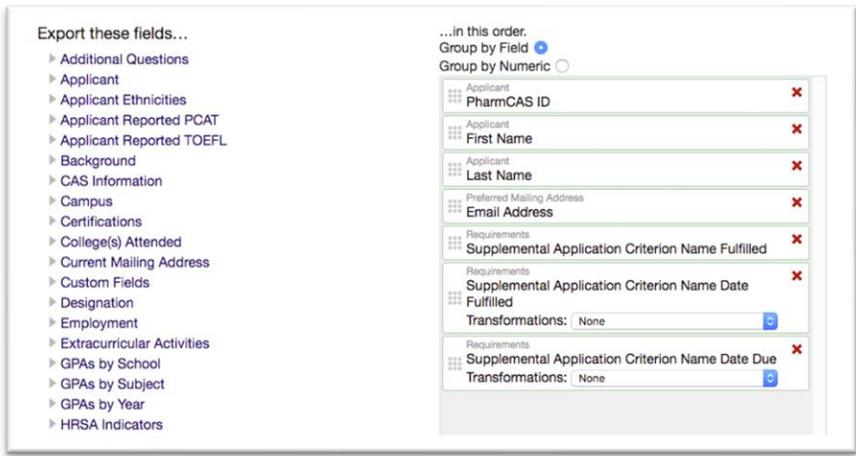


8. Select **Everyone** on the **These settings can be seen by** field. Then, indicate if the export should appear in the Menu Bar under the Reports & Exports panel.



9. Under the **Export these fields...** column, add the following fields:

- **Applicant:** PharmCAS ID, First Name, Last Name
- **Preferred Mailing Address:** Email Address
- **Requirements:** Select the fields you want to share with applicants when you update information on their Applicant Details page. Make sure to include the **criteria name, criteria name date due, and criteria name date fulfilled** (note that “criteria name” will reflect the actual nomenclature used when setting up your requirements).



10. After selecting your fields, select **Group by Numeric**.



11. When you're done adding criteria, click **Create File** to save and run the export or **Save Export Settings** to save the customized export without running.

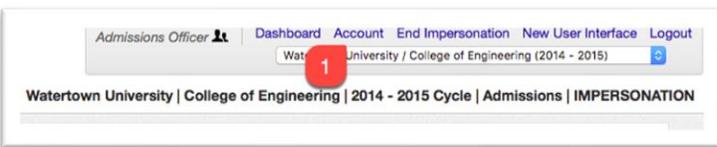


**Step 3: Generate your API key**

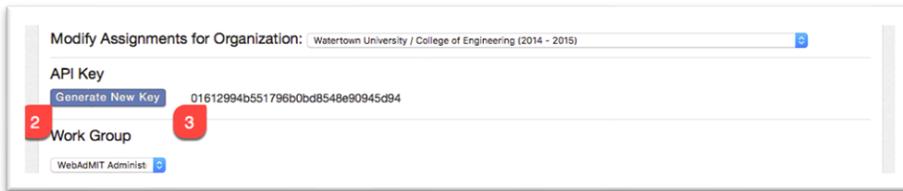
Generating your API key is quick and simple. Ensure you are either in a WebAdMIT Administrator workgroup or in a workgroup that has API access enabled.

**Note:** Skip to #3 if you already have an API key generated. If you don't know if you already have a key generated, click **Show Key** and a message will pop up with a long string of characters or it will ask you to generate a key if no key is present.

1. From the Page Header, click **Account**, then click the **Edit my Account** button to access your account.



2. Click the **Generate New Key** button to generate an API key.



3. A **secure token** populates. This token allows EMP to access your export on a daily basis in order to update applicants of their supplemental status. Make note of your key and send it WebAdMIT Support ([WebAdMITsupport@liaisonedu.com](mailto:WebAdMITsupport@liaisonedu.com))

### Contact Support for Help

Contact WebAdMIT Support ([WebAdMITsupport@liaisonedu.com](mailto:WebAdMITsupport@liaisonedu.com)) or Nicole Iarossi ([niarossi@liaisonedu.com](mailto:niarossi@liaisonedu.com)) for assistance.