

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.

▼ Management	
Admissions Users	
Custom Fields	
Local Status	
Requirements	

2. Click New Requirement.

Requirements Manager	New Requirement

3. 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
Check All Uncheck All
Submit Return to Requirements Manager

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

	Appl	ication fee	Add criterion
		Details	
0.01		\$75 Received	🖉 . 🗙

5. 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.

000	\$75 Received		
ue	Date		
se	comments 🗹		
ser	notes 🕢		
se	default comment 🕢		
	Comment	Default Value	۰.
	Pending	0	×

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.

Ex	port Manager			New Export
	Export	List	Show on Toolbar	
***	References	All Applicants		/ 🗅 🗙
	Applicant Names	All Applicants		/ 🗅 🗙

3. Select everyone to export.



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

Export	Everyone *	to a	Comma-Separated Values (.csv)	file
named			Comma-Separated Values (.csv)	
"Many" These s	fields will ou settings can	be se	Microsoft Excel (.xls) Fixed Width Report (.txt) Comma-Separated Values in Multiple Files (.zip)	

- 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).

Expo	rt Settings	
Export	Everyone	▼ to a Comma-Separated Values (.csv) ▼ file
named		with olumn headings.
"Many"	fields will output	as mar with is needed 🔻
These s	settings can be se	een by without
and wi	Il not - appear o	on the toolbar.

7. Select as many columns as needed.

Export octango		
Export Everyone	to a	Comma-Separated Values (.csv) 🔻
named	v	vith - column headings.
"Many" fields will output	as many	columns as needed 🖃
These settings can be s	as many	columns as needed
and will not 👻 appear	exactly by field o	category

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 criterion name, criterion name date due, and criterion name date fulfilled (note that "criterion name" will reflect the actual nomenclature used when setting up your requirements).

xport these fields	Group by Field S	
Additional Questions	Group by Numeric 〇	
Applicant	ere Applicant	×
Applicant Ethnicities	PharmCAS ID	
Applicant Reported PCAT	Applicant	×
Applicant Reported TOEFL	First Name	
Background	Applicant	×
CAS Information	Last Name	
Campus	Preferred Mailing Address	×
Certifications	Email Address	
College(s) Attended	Requirements Supplemental Application Criterion Name Fulfilled	×
Current Mailing Address	Despenditur Application Ontendit Harte Follined	-
Custom Fields	Supplemental Application Criterion Name Date	×
Designation	Fulfilled	
Employment	Transformations: None	
Extracurricular Activities	Requirements	~
GPAs by School	Supplemental Application Criterion Name Date Due	~
GPAs by Subject	Transformations: None	
GPAs by Year		
HBSA Indicators		

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

Export these fields > Additional Questions	in this order. Group by Field Group by Numeric 9	
 Applicant Applicant Ethnicities 	HarmCAS ID	×
 Applicant Reported PCAT Applicant Reported TOEFL 	First Name	×
▶ Background	Applicant Last Name	×

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.

	Create File	Save Export Settings	Return to Export Manager
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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.

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

ADLKov		
Generate New Key	01612004555170650548548600045494	
	3	
Work Group		

 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)

Contact Support for Help

Contact WebAdMIT Support (<u>WebAdMITsupport@liaisonedu.com</u>) or Nicole Iarossi (niarossi@liaisonedu.com) for assistance.