CHAPTER 1

Updating Application Program Actions and Statuses

This chapter provides an overview of admissions program actions and statuses and discusses how to:

- Update the program action and status of one application.
- Update program actions and statuses of multiple applications.
- **Bundle 27**
  New:
  Update program actions and action reasons using population selection.
- Update program actions and statuses using mass change.

Understanding Admissions Program Actions and Statuses

As applicants move through the admissions process, you must take action on their academic program and update their program status. You can update a single application, a group of applications, or you can use Population Selection or a mass change definition to update a large number of applications. When you enter new program actions, you will enter new effective dates. Thus, you can maintain a history of previous actions.

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The following note has been added.

Note. For institutions who are new to this functionality, Oracle recommends the use of the Update Program Action/Reason process with Population Selection for batch processing. See "Updating Program Actions and Action Reasons Using Population Selection" section in this chapter.

As you begin using program actions and statuses provided with Recruiting and Admissions, start with the most straightforward cases to become accustomed to the process. Then begin to work on the special cases, such as deferrals and reconsiderations.

Program status is the high level relationship a person has with an academic program. When you select a program action to change an applicant's program data, the program status often changes. Thus, the Program Action field on the Application Program Data page contains different rows of program data for a student. For example, a student goes from being an applicant to being admitted.

A *program action* is a change to a person's program data. An *action reason* indicates why a particular program action was taken, or offers a further description of the program action. For example, you can record that an applicant has withdrawn an application for an academic program. The reason you enter could be *After Decision* or *Before Decision.*

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For your reference, the program actions and program statuses relevant to admissions are explained in the following table:

If you Select this Program Action:	The System Updates the Program Status to:
Application Readmit Application Reconsideration	Applicant
Waitlist Waitlist Offer	Waitlisted
Admit Conditional Admit	Admitted
Admission Revocation Deny Administrative Withdrawal Applicant Withdrawal	Cancelled
Intention to Matriculate	Prematriculant
Matriculation	Active
Data Change Defer Decision Defer Enrollment Plan Change Program Change	The same Program Status as the previous row.

Program Status values are delivered with your system as translate values. Do not modify these values in any way. Any modification to these values require a substantial programming effort. You can, however, modify the *descriptions* of these values. Remember, however, that the altered description needs to retain its original meaning to avoid confusion.

The Program Status values delivered with your system that are relevant to admissions, along with their *original* descriptions, are:

- AC - Active in Program
- AD - Admitted
- AP - Applicant
- CN - Cancelled
- DE - Deceased
- PM - Prematriculant

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- WT - Waitlisted

Reviewing Admissions Program Action Definitions

The previous section details which admissions program actions set which program statuses. The chart below lists Program Action definitions and provides additional information about what happens when you choose a Program Action. Also, if any action triggers or requires an additional step, those requirements are described here.

Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Application	A person has an application that is under consideration by an academic program.	None.
Readmit Application	A person has applied to reenter a student career and academic program for which he or she already has a student record.	When you choose this action, the Career Number field becomes available for input. You must select which student record should be populated with the readmit information if the student ends up enrolling again. Additionally, if you enter this action, the admit type you enter on the Application Data page must be one associated with readmit processing.
Reconsideration	A person who has a cancelled status for the academic program, but is being reconsidered for admission in the same applicant pool.	After an action of reconsideration is taken, you can admit the applicant. You cannot take an action of *Admit* if the program status is *Cancelled.* You must first select a *Reconsideration* action.
Waitlist	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. For example, there may not be enough space in the class. The candidate is currently active on the waitlist.	None.
Waitlist Offer	A person has been evaluated and may be eligible for admission, but you do not want to offer them admission at this time. The candidate has been offered a place on a waitlist, but has not accepted that offer.	None.

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Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Admit	A person has been evaluated and admitted into an academic program.	When a person has a status of admitted or higher, depending on your application center setup, the Deposits link becomes available for input. If, in your application center, you use a deposit fee code that requires you to calculate a deposit, you must calculate an enrollment deposit before you can save the page. If your application's deposit fee code does not require you to calculate a deposit, or if you do not have a deposit fee code associated with your application center, you are not required to calculate a deposit. If an application was given a status of admit through the Application Status Update process, you can run the Calculate Deposits process to calculate an enrollment deposit for those applications.
Conditional Admit	A person has been evaluated and accepted into an academic program on a conditional basis. Along with a *Conditional Admit* action you can assign a checklist code to help track the outstanding requirements for the conditions of admission.	Same as for *Admit.*
Admission Revocation	A person was admitted into an academic program, but it was later determined that the person did not qualify for admission. The individual was assigned a *Cancelled* status from an *Admitted* or *Active* status.	When revoking admission for a person who has a current action of *Matriculation*, and therefore an *Active* status, you must go to Records and Enrollment to take this action on the Student Program/Plan component. When you revoke admission from Records and Enrollment, the Student program information is deleted and your application information is updated as *Cancelled Due to Admission Revocation.* If the person never had an action of matriculation, you can add an *Admission Revocation* action directly in PeopleSoft Recruiting and Admissions.
Deny	A person has been denied admission to an academic program.	None.

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Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Administrative Withdrawal	A person's application to an academic program has been withdrawn from consideration for admission or from enrollment in a class. This can be done before or after an action of admit has been taken or after the applicant has achieved active status. In addition, reasons can be created to clarify when or why the application was withdrawn.	None.
Applicant Withdrawal	A person has withdrawn from consideration for admission or from the entering class. Reasons can be created to clarify when or why the withdrawal occurred. For example, an action of applicant withdrawal with *Before Decision* as the reason indicates the individual withdrew early enough in the process that no admission decision had been made. A *Waitlist Withdrawal* reason indicates someone who did not want to accept a place on the waitlist.	None.
Intention to Matriculate	A person has indicated intent to matriculate, but has not completed all the steps to become an active student. Reasons can be defined to clarify why the candidate is changed from an admitted status to a *Prematriculant* status. For example, if you require that an admitted student submit multiple deposits to secure a place in the class, after the first deposit is received, you might indicate an intention to matriculate action with a reason of *First Deposit*.	None.
Matriculation	A person has completed all necessary steps to become an active student in an academic program.	When you enter an action of *Matriculation*, you must click the Create Program button that creates a record for this person in PeopleSoft Student Records. You can not save the page until you click this button. After you matriculate the applicant, the component is saved. Also, all fields become unavailable for input because this person now belongs to PeopleSoft Student Records.

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Admissions Program Action	Explanation	Additional Steps or Requirements Caused by this Action
Data Change	Data relative to an applicant's academic program was changed. This action records the fact that a change was made.	None.
Defer Decision	An evaluation was performed on an application, but a decision was not made. This action records the fact that an application has been evaluated. For example, a person applies under an early notification plan. The person is evaluated but does not meet the early decision criteria. The final decision is deferred until the regular decision deadline.	None.
Defer Enrollment	A person has been admitted and may be active for one admit term but will actually enroll in a later admit term. This action enables you to change the admit term for the applicant and record that he or she is deferring enrollment.	None.
Plan Change	The academic plan to which an applicant is applying was changed.	None.
Program Change	The academic program to which an applicant is applying was changed.	None.

Updating the Program Action and Status of One Application

Use the Application Program Data page to update the program action and status of one application. If you only have *one* application to update, do so through the Maintain Applications component.

See Also

lsad, Adding and Updating Applications, Adding New Applications Manually, Entering Application Program Data

Updating Program Actions and Statuses of Multiple Applications

This section discusses how to update program actions and statuses of multiple applications.

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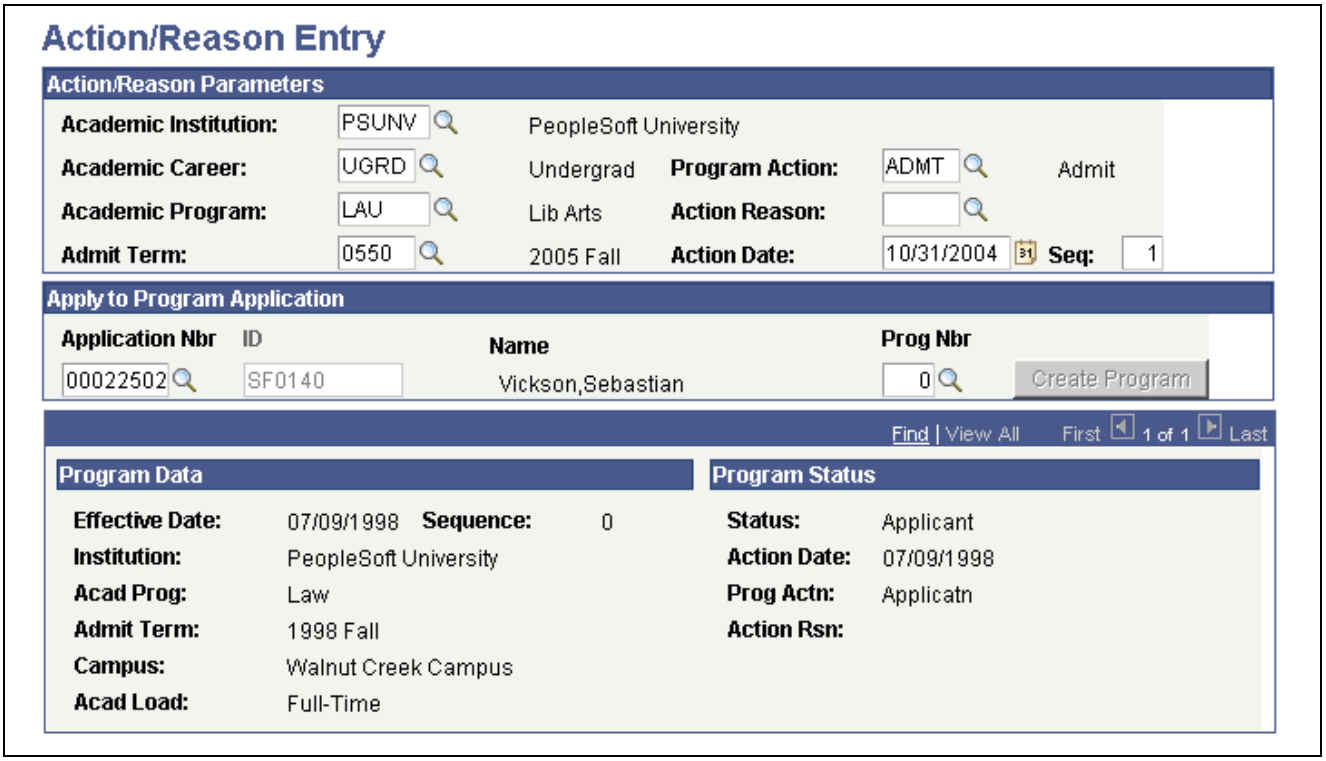
Page Used to Update Program Actions and Statuses of Multiple Applications

Page Name	Definition Name	Navigation	Usage
Action/Reason Entry	ADM_ACT_ENTRY	• Student Admissions, Application Evaluation, Application Decisions, Action/Reason Entry • Student Admissions, Application Maintenance, Action/Reason Entry	Update multiple applications to an identical program action and status. If you must update a *group* of applications which are for the same academic program and admit term with the same program action, it is faster to do so through this page, as opposed to one at a time on the Application Program Data page.

Updating Program Action and Status of Multiple Applications

Access the Action/Reason Entry page (Student Admissions, Application Evaluation, Application Decisions, Action/Reason Entry or Student Admissions, Application Maintenance, Action/Reason Entry).



Action/Reason Entry page

Note. Admissions application records use the Last Admit Term value to determine if the program should appear in the prompt. If the Last Admit Term field is populated on the Academic Program Table (ACAD_PROG_TBL), and the term is less than or equal to the term selected for the ID, the system does not display the value in the prompt.

Admit Term Enter an admit term. Admit terms are defined on the Term Values Table page.

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Program Action Enter the program action to be entered on the applications you are updating. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.

Action Reason Enter an action reason to be entered on the applications if you have defined any reasons for this program action. Values for this field are defined in the Action Reason Table page.

Action Date The default for the action date is your system date.

Seq (sequence) If the action you are taking has the same date as the current action, enter a *1*. Enter a *2* for another action on the same date. The default sequence is *0*.

Application Number and **ID** Enter the first application number to be processed. The ID displays. If you do not know the application number, prompt on the ID field.

Program Number Enter the program number if the application has multiple program numbers. When you navigate out of this page or click the Refresh button, you can verify that you have the correct person and application by reviewing the information displayed in the Program Data and Program Status group boxes.

Create Program After entering an application number, click this button to update the program data for the application number that you enter. This button is only available to click if you entered a program action of *MATR*.

Calculate Deposits Click this link to calculate deposits. The Calculate Deposits page appears. This link appears if you have entered a program action of *ADMT* and you have set up deposits for the application center.

Updating Program Actions and Action Reasons Using Population Selection

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The Update Program Action/Reason process is introduced. This process uses Population Selection to update program actions and statuses.

This section discusses how to run the Update Program Action/Reason process.

Page Used to Run the Update Program Action/Reason Process

Page Name	Definition Name	Navigation	Usage
Update Program Action/Reason	SAD_APL_PRG_RUN	Student Admissions, Processing Applications, Update Applications, Update Program Action/Reason	Run the Update Program Action/Reason process for a group of applicants.

Updating Program Actions and Action Reasons Using Population Selection

Access the Update Program Action/Reason page (Student Admissions, Processing Applications, Update Applications, Update Program Action/Reason).

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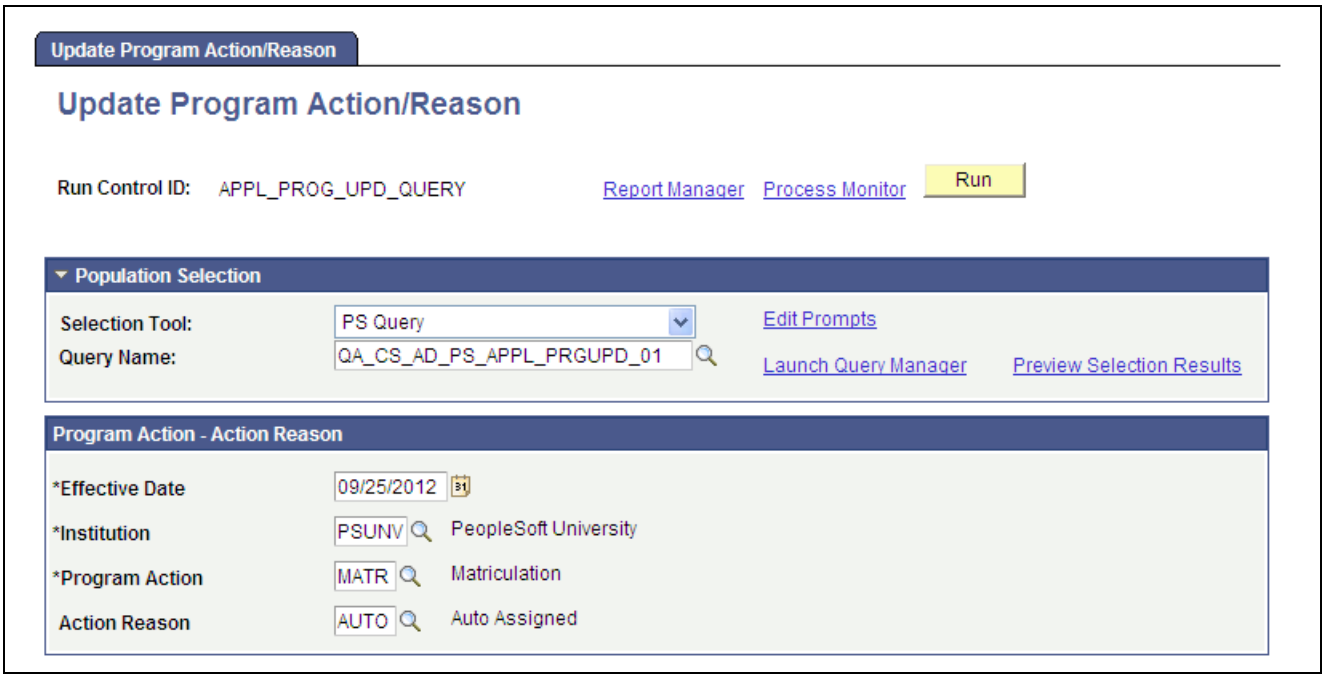

Update Program Action/Reason page

This page enables you to update program actions and action reasons for multiple applications, using Population Selection.

Population Selection

Use this group box to select the applicants whose applications are to be updated via the Update Program Action/Reason process.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction.

Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific selection tool (PS Query, Equation Engine, or external file) to identify IDs for a specific transaction, you must use it.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook*, Using the Population Selection Process

Selection Tool Select a tool to create the group of applicants whose records you want to update. The fields in this group box change depending on your selection. The Population Selection context definition, *Update Program Action/Reason*, delivered to support the use of population selection with this process, is configured for use with *Equation Engine*, *External File*, and *PS Query*.

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In creating either a query or equation for use with the Update Program Action/Reason process, the bind record SAD_APL_PRG_BND must be included in the query or equation. If the bind record is not included, then the query or equation will not appear as prompt value for the Query Name or Equation Name field. The bind record contains the required fields for the update process: Emplid, Institution, Academic Career, Application Number, and Application Program Number. Whether you use PS Query or Equation Engine, values for these fields for the selected applicants must be passed through in the selection tool in order for the process to know which records to update. You may extend the selection criteria beyond the required data fields by including other fields or by joining to other records. For example, you may want to include program action or admit term as part of the selection criteria and specify a value either in the query or equation or as a run time prompt. If External File is used as the selection tool, then the inbound file must also contain those data required fields.

The system delivers sample queries and equation. The sample queries are: QA_CS_AD_PS_APPL_PRGUPD_01 and QA_CS_AD_PS_APPL_PRGUPD_02. The sample equation is: ADADPSAPPUPD.

Program Action - Action Reason

Use this group box to specify the program action and action reason to be entered on the applications you are updating.

The Effective Date field, by default, displays the system date. You can change the default effective date. However, the effective date should be equal or greater than the system date.

The Update Program Action/Reason process first selects the applications according to the criteria defined in the Population Selection group box. Then, for each application, the process will add a new row to the Application Program Data page with the program action, action reason, and effective date that you have specified on the Program Action - Action Reason group box.

Updating Program Actions and Statuses Using Mass Change

This section provides an overview of how to update program actions and statuses using mass change and discusses how to run the Application Program Update process.

Understanding Multiple Application Program Action and Status Updates

If you have a large number of applications you want to update with the same program action, action reason, and academic program status, you can use a background process.

To update program actions and statuses of multiple applications:

1. Set up your Mass Change Definition.

   Use the Mass Change Definition - Description page to enter your mass change definition. The mass change definition defines the criteria for selecting which applications should be updated. PeopleSoft provides a sample mass change definition called *Application Program Update Select.* However, your institution might have defined its own mass change definition for updating program information, or your institution might have changed the shipped sample.

   See *PeopleTools PeopleBook*

2. Specify your Mass Change Criteria and Defaults.

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Use the Mass Change Definition - Criteria and Defaults page to set up your mass change criteria. You also choose the program action and action reason codes to be added to the selected application records. The system automatically updates the program status according to the action taken.

There is one SQL statement execution sequence for this Mass Change Definition: *Select Applicant Criteria*.

In the Defaults group box, select the codes you want added to the new program row for the selected applications. You may select values for program action and action reason. For example, you might be updating these applications with a program action of *DENY,* and an action reason of *AUTO*. These two fields are stored on the Application Program Data page.

3. Generate your SQL Statement to select the applications to be updated.

   Use the Mass Change Definition - Generate SQL page to generate the SQL statement for this mass change definition. Click the Clear Sw button then the Generate SQL button so do this. After generating the SQL, select Save. After setting up your mass change definition and generating your SQL statement, you are ready to process your mass change.

4. Run a Mass Change Group to select the applications to be updated.

   Use the Run Mass Change page to process your mass change and select the actual applications to be updated during the Application Program Update process. This process selects the actual applications to be updated.

   Because you want to delete any data in the temp file before running this process, you can use a mass change group that PeopleSoft provides, which deletes the temp using the delivered Communication - Delete Temp mass change definition and runs your *Application Prog Update Select* mass change definition.

   Select *Application Prog Update Base* in the Mass Change Group ID field. If you want to create a different Mass Change Group or modify *Application Prog Update Base,* use the Mass Change Group component before running the mass change group on Run Mass Change. On Run Mass Change, click the Execute Mass Change Group radio button to make the Mass Change Group ID field available for selection.

5. Run the Application Program Update process to do the actual updating of applications.

   Use the Application Program Update page to update the program data of the selected applications. A new row of program data is added to the selected applications on the Application Program Data page.

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Pages Used to Run the Application Program Update Process

Page Name	Definition Name	Navigation	Usage
Application Program Update	RUNCTL_PROGUPDT	Student Admissions, Processing Applications, Update Applications, Application Program Update	Update the program data of the selected applications. This process uses the applicants selected when running the mass change group to insert the program action and program reason defined on the Criteria and Defaults page of the Mass Change Definition component. You must first process your mass change group before running the application program update process.
Mass Change Definition	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Definition	Define criteria for applications to be updated.
Mass Change Group	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Mass Change Group	Define the execution sequence for the mass change definitions.
Run Mass Change	MC_DEFN_00	Student Admissions, Processing Applications, Mass Change, Run Mass Change	Run the mass change group to select the application to be updated via the application program update process.

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