

RADIUS TRAINING – Part 1: List views and Targets Plus More

1. Key Terms and Where to Find Them and What Each Means

a. Lifecycle Role/Stage

- i. This defines where the student is in the funnel (up to submitted application).
- ii. Found on the **Contact Module**
- iii. Current **Roles** in Radius:
The roles currently being used: Lead, Inquiry, and Applicant
Roles added in the buildout but not currently used: Decision, Enrolled, HS Counselor, Special Student, Advisor
- iv. Current **Stages** in Radius:
Stages currently used: Active, Inactive, Incomplete, Application Login Created, Application Form Canceled, Application Form Started
- v. Examples of currently used Lifecycle Role/Stages:
Inquiry-Active
Inquiry-Application Login Created
Inquiry-Application Form Started
Applicant-Incomplete

b. I am inquiring as or I am applying as

- i. These fields define the **Student Type**.
- ii. **I am inquiring as** is found on the **Contact Module**
- iii. **I am applying as** is found on the **Application (Registration) Module**
- iv. Current values used for each field in Radius:
Freshman
Transfer
Returning Evergreen Student
Graduate
Post Baccalaureate

c. My intended start term or My start term quarter will be

- i. These fields define what term or quarter the student is planning to start at Evergreen.
- ii. **My intended start term** is found on the **Contact Module**
- iii. **My start term quarter will be** is found on the **Application (Registration) Module**

d. My intended start year or My start term year will be

- i. These fields define what year the student is planning to start at Evergreen.
- ii. **My intended start year** is found on the **Contact Module**
- iii. **My start term year will be** is found on the **Application (Registration) Module**

e. I am inquiring to the campus in or Campus applying to

- i. These fields define where the student is planning on attending classes.
- ii. **I am inquiring to the campus in** is found on the **Contact Module**
- iii. **Campus applying to** is found on the **Application (Registration) Module**

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- iv. Current values used for these fields are:
 - Olympia
 - Tacoma
 - Tribal – MPA
 - Native Pathways – Olympia
 - Native Pathways – Tacoma
- v. Values exist in this drop down but are no longer used. We must retain these values for historical purposes. **DO NOT** select values that are not listed above.
- f. **Mailing Address Information** is found on the **Contact Module**
 - i. Street Address 1 = **Mailing Address Street 1**
 - ii. Street Address 2 = **Mailing Address Street 2**
 - iii. City = **Mailing City**
 - iv. State or Province = **Mailing Address state or Province**
 - v. Zip Code = **Mailing Postal Code**
 - vi. Country = **Mailing Address Country**
 - vii. Washington County = **Mailing Address County WA only**
 - viii. California County = **Mailing Address County CA only**
- g. **Emails** are found on the **Contact Module**
 - i. Personal Email = **Email**
 - ii. Evergreen Email = **TESC Email**
 - iii. Additional Emails = **Other Email**
- h. **Birth Date** is found on the **Contact Module**
 - i. Birth Date = **Date of Birth**
- i. **Application** related information is found on the **Application (Registration) Module**
 - i. Application Date (Banner) = **Application Submitted Date**
 - ii. Application Status (Banner) = **Application Status**
 - iii. Application Status Date (Banner) = **Application Status Date**
 - iv. Application Decision (Banner) = **Decision Confirmation Status**
 - v. Application Decision Date (Banner) = **Decision Confirmation Date**
 - vi. Admission Type (Banner) = **Admission Type – APP**
- j. **Application Status** as defined/used in Radius
 - i. Application CAPP Dupe = A duplicate Common Application was submitted
 - ii. Application Complete = Application checklist in Banner is complete
 - iii. Application Form Canceled = Form is not valid (may have been started by mistake). This should only be used by an Administrator or Senior Credential Evaluator
 - iv. **Application Form Started** = Student has started the online Radius application
 - v. **Application Incomplete** = Application has been submitted and has been moved to Banner for processing

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- vi. Application Moved = Student has requested their application to be moved to another term. This is seldom used and should only be updated by an Administrator or Senior Credential Evaluator
- vii. **Application Not Verified** = Application has been submitted but has not been verified “ok” to move to Banner. The application fee may be missing or a fee waiver has been requested that needs to be approved
- viii. Application Term Closed = A student started an application but did not finish and submit the form prior to the final day to accept applications for that term.
- ix. Application Withdrawn = Student has withdrawn application after submission
- x. Application Wrong Iteration = Student submitted an online application for the wrong cohort and a new iteration line has been added to the students Application Module. We do not delete or move the submitted application form.
- k. **Decision Confirmation Status** as defined/used in Radius
 - i. Denied = application was denied
 - ii. Eligible = student has been admitted
 - iii. Paid = Enrollment deposit has been paid
 - iv. Waived Deposit = Enrollment deposit has been waived
 - v. Withdrew-AP Status = Student withdrew application prior to being admitted
 - vi. Withdrew-EL Status = Student withdrew application after being admitted but before paying deposit
 - vii. Withdrew-PD Status = Student withdrew application after paying deposit or having deposit waived
- 2. **Checklist Items Tab**
 - a. This tab will list the documents or items the student is required to submit for a
- 3. Key fields to add to all list views or targets. All fields below are found on the **Contact Module**
 - a. **Confidential Record** = this is a yes/no field. This field must be added to all list views and targets. If this field is marked “**Yes**” these names need to be removed from any list being provided to an **outside vendor**. It is also imperative to be aware of this when answering a phone call or email.
 - b. **Do not call** = student has indicated they do not want to be contact via phone. Remove these name form **ALL** calling lists.
 - c. **I agree to receive text messages (new)** = This is a yes/no field and needs to be added to all list views being used for text messaging. **OR**, you **MUST** review this field on each students record if you are sending individual text messages.
 - d. **Radius Email Opt-out** = This is a system field. If this is checked, these records are to be removed from **ALL** mailing lists.
 - e. **Contact Preferences** = This is a system field and is updated by the student from emails or by internal staff at the request of students sent via email. This field should be added to all targets or lists being used for mailings or email campaigns.

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