

Updating an Undergrad Radius Record to Grad Prospect Record

Last Update: 7/19/2016

How we enter graduate program inquiry data in a record of a current Evergreen undergraduate applicant or current student. (Note distinction between a current student and current applicant)

- 1) Search Radius in the Global Search field to see if record already exists. Search by any of the following:
 - a. Enter the full name using first then last (Jane Smith). It may be necessary to search by partial name using the wild card symbol of *. (For ex: William; Bill; Will; or Jennifer; Jenn; or Pamela; Pam)
 - b. Enter the email address (copy and paste is preferred)
 - c. Enter the Banner A# if known.
- 2) Select student record by clicking on record
 - a. Be aware of parent records with similar names
 - b. If there is a student ID, parent records will have an A# with .1, .2, etc.
- 3) On the Contact Module, review the following sections:
 - a. At the top of the Contact Module record, review the following:

Student ID: CONFIDENTIAL RECORD:

Full Name: Teacher Candidate Contact Owner: Maggie Foran

- i. Is this a Confidential Record? If yes, be careful what you update and what info is visible to others! This especially applies to employees!!
- ii. Who is the Contact Owner?
 1. If already a GR AD, make sure it isn't attached to a current inquiry for another program.
 2. If an UG Admission Counselor, verify that the inquiry data is not for a current applicant. If not current, update to respective GR AD. (See Key Recruitment Info section.)

- b. Review Key Recruitment Information section

Key Recruitment Information

Admission Type: 4 - Transfer from 2-year My intended start year: 2016

I am inquiring as a: Returning Evergreen Student My intended start term: Fall

I am inquiring to the campus in: Olympia Program ID Code: BA

Student Interest Level: Division Level Code: UG

VIP Inquiry Referral: Major ID Code: UG

Radius Contact Type: Previous Contact Owner:

Lifecycle Role/Stage:

If this is **not** a current applicant, update the following fields: (See step 4)

- i. I am inquiring as a: *updated to* **Graduate**
- ii. I am inquiring to the campus in: *update to either* **Tacoma** or **Tribal – MPA**
- iii. My intended start year: *update to applicable year*
- iv. My intended start term: *update to* **Fall** *if it is not already indicated*
- v. Program ID Code: *update to specific grad program* **MIT, MPA, MES**
- vi. Division Level Code: *update to* **GR**
- vii. Major ID Code: *update to specific grad program –* **MIT, MPA, MES**

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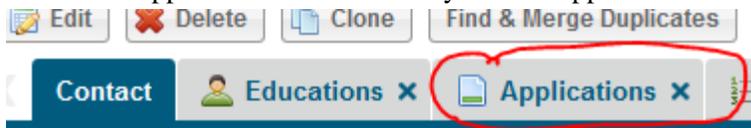
- viii. Previous Contact Owner: *update this field with the name of the previous owner listed in "Contact Owner" at the top of the page*

The updated section will look something like this:

Key Recruitment Information

Admission Type:	My intended start year: 2016
I am inquiring as a: Graduate	My intended start term: Fall
I am inquiring to the campus in: Olympia	Program ID Code: MIT
Student Interest Level:	Division Level Code: GR
VIP Inquiry Referral:	Major ID Code: MIT
Radius Contact Type:	Previous Contact Owner: Josephine Bernier
Lifecycle Role/Stage: Inquiry-Active	

- 4) Additional fields to update will be:
- a. Date of Birth (if known and not already populated) – this greatly helps to reduce duplicates
 - b. GR Initial Program Contact Source (required)
 - c. GR Initial Program Contact Date (required) This field will NOT auto-populate
 - d. Mailing address should be verified or updated using Banner address standards format. If there is an A#, update the address in both the CRM and Banner.
- 5) Review the Application Module for UG application(s) and/or GR application. Click on the Application tab to access the Application Module. Verify that the application is not a CURRENT UG application.



- a. These are a few options of what you may see:

Student ID	Iteration Name	Contact	Applications Status	Application	Balance	Decision Confir	Decision C
A00398281	201710_GR_G	Valerie Anthos	Application Withdrawn	02/13/2016		Withdrew-EL Sta	04/15/201

Student ID	Iteration Name	Contact	Applications Status	Application	Balance	Decision Confir	Decision C
A00031465	201510_GR_G	Peik Andersen	Application Incomplete				
A00031465	201610_GR_G	Peik Andersen	Application Decision Made	02/06/2015 1		Paid	04/23/2015

Student ID	Iteration Name	Contact	Applications Status	Application	Balance	Decision Confir	Decision C
A00378607	201710_UG_N	Tiana Altman	Application Withdrawn	10/22/2015 1		Withdrew-PD Stat	04/26/2016
A00378607	201720_UG_N	Tiana Altman	Application Incomplete	04/26/2016 1			

DO NOT UPDATE ANY INFORMATION ON THE APPLICATIONS!!

- b. In reviewing this information you will be able to determine if the record pertains to a current applicant or a current Evergreen student. If NOT a current applicant or student, follow the instructions in Step 3b.

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- c. NOTE: Make sure to make a note if this application is a Post Bacc app and could be completing UG coursework related to a grad application.