CIEP Interim Process - Adding an Application Manually

**Purpose:** The instructions below describe how CIEP enters an application manually. Before adding a new application, perform a Search/Match to determine if a person record already exists. If a person record already exists, enter the person ID on the first page of Add Application (Step 1 below). The existing information in the person record will pre-fill on the application.

<table>
<thead>
<tr>
<th>Topic</th>
<th>See page…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Add Application</td>
<td>2</td>
</tr>
<tr>
<td>Enter Biographical Details</td>
<td>3</td>
</tr>
<tr>
<td>Enter Ethnicity</td>
<td>5</td>
</tr>
<tr>
<td>Enter Application Program Data</td>
<td>6</td>
</tr>
<tr>
<td>Enter Application Data</td>
<td>7</td>
</tr>
<tr>
<td>Enter Application/School Recruiting (High School)</td>
<td>8</td>
</tr>
<tr>
<td>Enter External Education (College Record)</td>
<td>9</td>
</tr>
<tr>
<td>Enter Residency</td>
<td>10</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
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</table>
| 1.   | Navigate to the **Add Application** page. Select **Main Menu › Student Admission › Application Entry › Add Application.**  
*Result:* The Application Entry page displays. |

**Application Entry**

Application Nbr:  
ID:  
Academic Institution:  
Academic Career:  
Add →

<table>
<thead>
<tr>
<th>2.</th>
<th>Complete the following:</th>
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<tbody>
<tr>
<td></td>
<td><strong>Application Number</strong> – DO NOT CHANGE. The system will automatically assign an application number once the application is saved.</td>
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<tr>
<td></td>
<td><strong>ID</strong> – DO NOT CHANGE. This will be auto assigned. <strong>Note:</strong> If the person already exists in the system (determined by Search/Match), enter their existing id here. This pre-populates some fields on the application.</td>
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<tr>
<td></td>
<td><strong>Academic Institution</strong> – UNICS (University of Northern Iowa Campus Solutions). You may set this value as a default.</td>
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<tr>
<td></td>
<td><strong>Academic Career</strong> – Use the Lookup button to select GRAD (graduate) or UGRD (undergraduate)</td>
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</tbody>
</table>
3. Click the **Add** button.

**Result:** The *Add Application* page (**Biographical Details** tab) displays.
<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>4.</td>
<td>Complete the following on the <strong>Biographical Details</strong> tab:</td>
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</table>

**Person Information:**
- **Effective date** – Today’s date (can be changed if needed)
- **Format Using** – Defaults to English – DO NOT CHANGE
- **Prefix** – Select appropriate prefix or leave blank
- **First Name** - Enter first name as given
- **Last Name** – Enter last name as given
- **Middle Name** – Enter middle name as given
- **Suffix** – Select appropriate prefix as applicable
- **Date of Birth** – Enter as ddmmmyyy – CS will format OR use the **Choose a Date** button to select from the calendar
- **Birth Information** link – Click to enter birth details such as City, Country
- **Campus ID** – NOT USED AT THIS TIME

**Biographical History:**
- **Effective Date** – Today’s date
- **Marital Status/ As of** – NOT USED BY CIEP
- **Gender** – Enter as given

**National ID:** This is for SSN. NOT USED BY CIEP

**Contact Information:**

**Addresses**
- **Address Type** – Select as appropriate
- **Effective Date** – Today’s date
- **Status** – Active
- **Country** – Select USA or change as appropriate if International
- **Address (Click Edit Address)**
  - **Address 1** – Street Address
  - **City** – Enter as given
  - **State** – Enter as given
  - **Postal** – Enter as given
  - **County** – DO NOT ENTER, the system will auto assign

**Phone**
- **Type** – Select as appropriate
- **Phone** – Enter as given without hyphens, CS will format
- **Ext** – If applicable
- **Country** – If applicable

**Email**
- **Type** - Select as appropriate
- **Email Address** – As given (ensure the address has “@” and “.”
- **Visa/Permit Data** – Enter Visa status information – Entry Country (USA) & Type
- **Citizenship** – Enter Country of Citizenship
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<tr>
<td>5.</td>
<td>Select the <strong>Regional</strong> tab. Complete the <strong>Ethnicity</strong> information on the <strong>Regional</strong> page:</td>
</tr>
</tbody>
</table>

**Ethnicity**
- **Person is Hispanic or Latino** – Check if appropriate
- **If Yes, Select Ethnic Group** – Select ONLY if Hispanic/Latino box is checked.
- **Regulatory Region** – USA
- **Ethnic Group** – Select as appropriate
- **Primary/IPEDS/Percentage** – NOT USED AT THIS TIME

**History** - NOT USED AT THIS TIME
<table>
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<td>6.</td>
<td>Complete the <strong>Program Data</strong> and <strong>Program Status</strong> information on the <em>Application Program Data</em> tab:</td>
</tr>
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</table>

**Program Data**
- **Admit Term** – Select the appropriate term
- **Academic Program** – Select NONUG (Nondegree-Undergraduate)
- **Joint Program** checkbox – NOT USED AT THIS TIME
- **Academic Load** – Defaults to *Full Time*, change if applicable
- **Effective Date** – Today’s date
- **Expected Graduation Term** – NOT USED AT THIS TIME, will be auto-calculated
- **Campus** – Main

**Program Status**
- **Status** – Determined by *Program Action*.
- **Program Action** – Defaults to appropriate value (APPL – Application)
- **Action Date** – Today’s date
- **Action Reason** – Not Required. Select the appropriate value, values are dynamic and change with each *Program Action* selected
- **Evaluation** link – NOT USED AT THIS TIME

**Plan Data**
- **Academic Plan** – Enter CIEPUG for undergraduate students, and CIEPGR for graduate students
Complete the Application Data information on the Application Data tab:

**Application Data**
- **Application Center** – Select CIEP
- **Application Date** – Today’s date
- **Created On** – Today’s date
- **Prior Application** checkbox – NOT USED AT THIS TIME
- **Admit Type** – Select as appropriate
- **Academic Level** – NOT USED BY CIEP
- **Notification Plan** – NOT USED CIEP
- **Application Method** – NOT USED CIEP

**Additional Information/File Information/Application Fee Information** - NOT USED AT THIS TIME

**File Attachments** – NOT USED AT THIS TIME
Complete the **School Information** information on the *Application School/Recruiting* tab:

- **Last School Attended** – Select last school attended. This could be a high school or college.
- **Graduation Date** – If last school is a high school, enter graduation date. Enter as ddmmyyyy, CS will format

**Recruiting Information/ Recruiting Categories/Recruiters** – NOT USED AT THIS TIME
Step 9. At the bottom of the page, select **Education** from the **Transfer To** drop-down field. Click the **Go** button.

**Result:** The Education page (External Education tab) displays.

- **External Org ID** - The system populates this field from the initial add of the **Last School Attended**.
- Use the **Add Row** button to enter the colleges or universities listed on the application form.

**Note:** Click the **Expand Section** button to view the School Details.
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<td>10.</td>
<td>Navigate to <strong>Residency</strong>. At the bottom of the page, select <strong>Residency Data</strong> from the <strong>Transfer To</strong> drop-down field. Click the <strong>Go</strong> button.</td>
</tr>
</tbody>
</table>

**Transfer To:**

Select **Residency Data** from the **Transfer To** drop-down field. Click the **Go** button.

**IMPORTANT:** Residency must be entered in order to term activate!

**Result:** The **Residency Official 1** tab displays. This is the only tab used at this time.

Complete the following information:

- **Effective Term** – Use the **Look Up** button to select the appropriate term.
- **Residency** – Select the appropriate value (Non-Resident, Resident, Not Determined). **Note:** The **Additional Residency Data** section populates based on the selection made in the **Residency** field.
- **Residency Date** – Use the **Choose a Date** button to select the appropriate date or enter the date (format = ddmmyyyy) - CS will add date format.

**Note:** There are specific procedures to follow in the event of an exception. For example, the student is a non-resident, however we want to charge “resident” tuition rates, as an exception, because of military service, spouse of faculty, etc.

| 11.  | Click the **Save** button at the bottom of the screen. |

**Result:** The application has been saved. The system has assigned an **Application Number** to the new application.