

# **Applicant Gateway**

2018 CONFIGURATION GUIDE

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# **Section 1: Introduction**

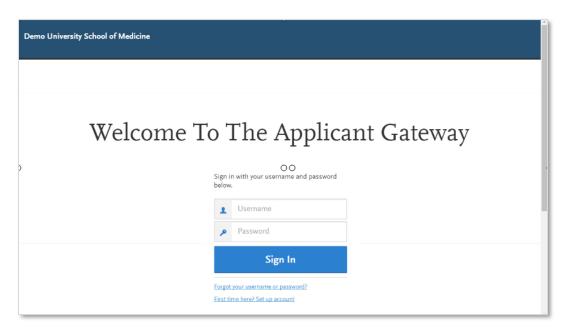
# What is the Applicant Gateway?

The Applicant Gateway is a portal where applicants can complete the following admissions-related activities:

- Complete and submit supplemental applications
- Submit payments
- Schedule interviews
- Upload additional documents
- Accept offers
- Collect prerequisites
- Record competencies

Your program can select which activities to enable for applicants. Once you configure activities, you can determine at which point in the admissions process each activity becomes available to each applicant via WebAdMIT for AMCAS.

#### Example Applicant Gateway



# Section 2: Configuring the Applicant Gateway

Use the Applicant Gateway Configuration Manager to customize the Applicant Gateway for your program(s).

### **Access your Programs**

- 1. Log in to WebAdMIT for AMCAS with your username and password.
- 2. Click **CAS Configuration Portal** under Management in the left menu.



3. The Configuration Manager launches in a new window. Select AMCAS on the left.



- 4. Select the current application cycle.
- 5. Select your organization or school.

From here, you can add new Applicant Gateways or edit existing ones.

#### Create a New Applicant Gateway

- 1. Click + App Gateway at the bottom of the page.
- Select the program you want to create an Applicant Gateway for. Each program can only have one Applicant Gateway; if one was already created for your program, the program will not appear in the list.
- 3. Enter a name for the Applicant Gateway and click **Add**. This name is for your reference only and does not display for applicants.
- 4. The new Applicant Gateway appears in the list. Hover your mouse over it and click **Edit Details**.

#### **Edit Existing Applicant Gateway**

To edit an existing Applicant Gateway, hover your mouse over the Applicant Gateway and click **Edit Details**.



#### Sync with WebAdMIT for AMCAS

Any changes to the Applicant Gateway must be synced with WebAdMIT for AMCAS. A sync job runs automatically every day at midnight. If you need the sync to run immediately, you can contact the WebAdMIT for AMCAS Support Team to request it.

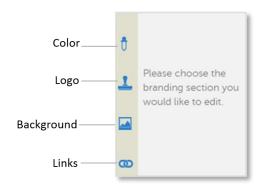
The WebAdMIT for AMCAS Support Team is available Monday-Friday from 9:00am to 5:00pm (ET).

- WebAdMIT for AMCAS Support Email: webadmitamcassupport@liaisonedu.com
- WebAdMIT for AMCAS Support Phone: 617-612-2049

# Section 3: Branding the Applicant Gateway

You can customize the background image and links that appear in your program's Applicant Gateway. Click the **Palette** icon to configure your branding.

On the left of the page, you'll use four buttons to configure your branding.



#### **Select Colors**

You can select primary, secondary, and text colors for your program.

- 1. Click the **Color** icon.
- 2. Click a color wheel to edit the Primary, Secondary, or Text colors.
- 3. Select a color from the palette or enter the color's Hex #. Note that only shades of white, gray, or black are available for Text colors.
- 4. Click Select.
- 5. Edit other colors as needed, then click **Save**.

# Upload your Logo

Your logo appears on the top of your Applicant Gateway. Your overall image size should be 70 px by 360 px and no larger than 250kb.

- 1. Click the **Logo** icon.
- 2. Click the **Search** icon and select your image.
- 3. Click Save.

# Add a Background Image

The background image displays on the Applicant Gateway Login page and behind the Applicant Gateway dashboard. You can use an image from the image library or upload your own image. Your overall image size should be at least 1000 px by 1000 px and no larger than 256kb.

- 1. Click the **Background** icon.
- 2. Select **Upload Images** if you want to use your own image or **Choose Existing** to use an image from the library.
  - a. If you select **Upload Image**, click the **Search** icon and select your image.
  - b. If you select **Choose Existing**, click the library image you want to use.
- 3. Click Save.

### Add a Link

#### **Program Links**

You can include a Program Link to your school or organization's website. This link will appear at the top of the Applicant Gateway with the text "Learn More." If you do not add a Program Link, the text will not appear.

- 1. Click the Links icon.
- 2. Click Add Learn More Link.
- 3. Enter the website URL in the **Hyperlink** field.
- 4. Click Add.

To edit the Program Link, click the Links icon and click Edit.

#### **Footer Links**

You can include up to four Footer Links that appear at the bottom of the Applicant Gateway. These can link to your program overview, additional program information, instructions, etc. The total number of combined characters (including spaces) used in the footer links cannot exceed 120 characters.

- 1. Click the Links icon.
- 2. Click Add under Footer Links.
- 3. Enter a title. This text will display in the footer.
- 4. Enter the website URL in the Hyperlink field.
- 5. Click Add.
- 6. Continue adding footer links, as needed.

To edit or delete Footer links, click Links then click the pencil or trash can icon, respectively.

# Section 4: Configuring Applicant Gateway Activities

The following activities can be configured for applicants:

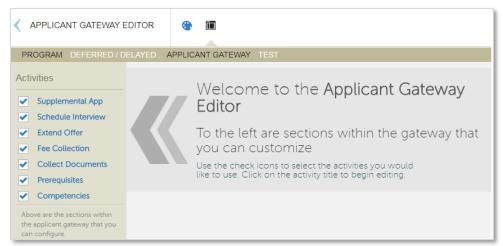
- Supplemental Applications
- Schedule Interviews
- Extend Offer
- Fee Collection
- Collect Documents
- Collect Prerequisites
- Record Competencies

To configure activities, follow the steps below.

1. Click the **Activities** icon at the top of the page.



2. Click the checkboxes next to the activities you want to configure for your program.



# **Activity Format**

Each activity includes an introduction that provides an overview of the activity and a finishing statement that displays when the activity is completed. You can fully customize the text in these sections to meet your program's needs.

#### **Content Formatting Tips**

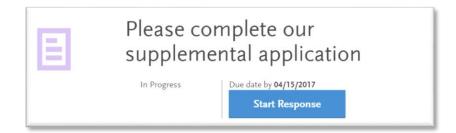
- ✓ Header text is limited to 200 characters.
- ✓ Introduction and Finishing Statement text is limited to 1,500 characters.
- ✓ Use the bold and italic options to format your text, as needed.
- ✓ Underline only when utilizing a hyperlink.
- ✓ Use the bulleted list, numbered list, and indent options to structure your text.
- ✓ Use the link icon to add links to websites or email addresses. Links open in a new browser window.

# **Supplemental Applications**

You can create a Supplemental Application to include program-specific questions for the applicant, such as additional essays, questions on work experience, etc. You can also opt to collect a fee for the Supplemental Application after the applicant completes the questions. If you require a fee, applicants will enter their credit card and address information.

To create a Supplemental Application, click the **Supplemental App** link on the Applicant Gateway Editor page.

Example of Supplemental Application Activity



#### **Create Introductory and Finishing Text**

The text you include in the Activity Introduction displays to the applicant before they begin the Supplemental Application. You can use this space to describe how your program uses the information provided by the applicant, any applicable fees, and how to contact your admissions department.

The text you include in the Finishing Statement displays when the applicant completes the Supplemental Application. You can use this space to explain the timeframes in which the admissions team reviews the applications or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the Activity Introduction.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the Finishing Statement.
- 4. In the next field, enter text that acknowledges the applicant successfully completed the activity.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Configure Questions**

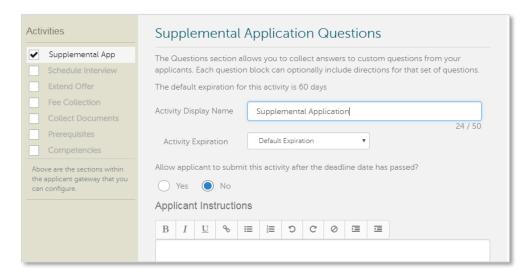
In this section, you can add program-specific questions for the applicant. These questions can be required or optional and there is no limit to the number of questions you can ask.

The **Activity Display Name** defaults to "Supplemental Application" and the activity expiration defaults to 60 days, but you can adjust this in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 60 days from activation.
- Number of Days from Activation: Specify the number of days from activation the activity will
  expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to submit their answers after the program's deadline date.

Use the **Applicant Instructions** field to include text that explains the questions.



#### **Add Question Sets**

Questions Sets can be used to group questions together in a specific category, such as additional essays, work experience, etc. You must create at least one Question Set.

- 1. Click + Add Question Set.
- 2. Add header text. This appears above your question(s) and can be used to summarize the questions or provide other relevant details.
- 3. Add an optional description.
- 4. Click + Add.

#### Add Questions

Once you create a Question Set, you can add questions to it. There are several question types you can choose from, depending on the format in which you expect applicants to answer each question:

- **Multiple Choice**: Questions can be single or multiple answer.
  - Single answer questions can appear with radio buttons or drop-down menus for applicants to select. Applicants can choose only one response.
  - Multiple answer questions appear with checkboxes for applicants to select. Applicants can choose one or more responses.
- Essay: Questions appear with a text box where applicants can type their response. You can set the maximum number of characters that applicants can enter (up to 9,999 characters). If you want the question to appear as a short, one-line answer, set the character limit to 50 characters. If you want applicants to enter a longer answer, set the character limit to 250 characters or more.
- **Either/Or**: Questions appear with radio buttons where applicants can choose from two responses.
- 1. Click + Add Question.
- 2. Select whether the question is required or not.
- 3. Enter a **Question Description**.
- 4. Select a **Question Type** from the drop-down.
- 5. Configure additional options, depending on the Question Type selected.
- 6. Click Add.
- 7. Add more questions and question sets as needed and click **Save**.
- 8. Click **Continue** to move to the next section.

Note that if you use Multiple Choice or Either/Or Question Types, the answer options will not be visible in the Applicant Gateway once the activity is activated. We recommend keeping a separate record of Supplemental Application questions and answer options.

#### **Configure Payment**

You can elect to require applicants to submit a fee as part of their supplemental application. Payment options are configurable via the Applicant Gateway and can be used in conjunction with PayPal, TouchNet, and CashNet. See Section 6: Configuring Payments for more information.

If you do not want to configure this option, select **No** and click **Save**. Otherwise, follow the steps below.

- 1. Select **Yes** to indicate you want to add a payment.
- 2. Enter a **Payment Name** (e.g. Supplemental Application Fee). This name will display for the applicant.
- 3. Enter the fee amount as a whole number with no decimal points (e.g. \$20 not \$20.00).
- 4. Click the Waive fee if applicant is approved for financial assistance checkbox if appropriate.
- Click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Supplemental Application, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, contact the WebAdMIT for AMCAS support team.

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Supplemental Application activity for activation, **you can no longer edit it.** Submit only when you are sure that the activity is complete and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

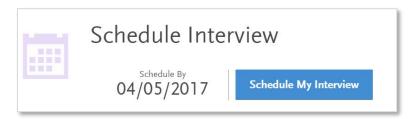
# Interview Scheduling

In this section, you can configure the Schedule Interview activity which allows applicants to select their own interview dates and times from a drop-down. Available interview dates and times are configured in WebAdMIT for AMCAS and can be different for each applicant group. For more information on configuring interview types, see Section 10: Working with Interviews in the WebAdMIT for AMCAS User Guide.

Note that if you do not wish to use this feature, your admissions team can instead assign applicants and interview times directly in WebAdMIT for AMCAS.

To configure, click the **Schedule Interview** link on the Applicant Gateway Editor page.

Example of Schedule Interview Activity



#### **Create Introductory and Finishing Text**

The text you include in the Activity Introduction displays to the applicant before they schedule their interview. You can use this space to describe how your program conducts interviews and how to contact your admissions department.

The text you include in the Finishing Statement displays when the applicant completes the activity. You can use this space to explain any additional steps the applicant needs to complete.

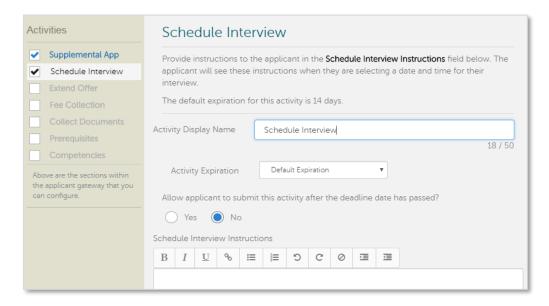
- 1. Enter a header/title for the Activity Introduction.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the Finishing Statement.
- 4. In the next field, enter text that acknowledges the applicant successfully completed the activity.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for scheduling interviews. The **Activity Display Name** defaults to "Schedule Interview" and the activity expiration defaults to 14 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 14 days from activation.
- Number of Days from Activation: Specify the number of days from activation the activity will
  expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to upload documents after the program's deadline date.



Enter your instructions in the field and click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Schedule Interview activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, **contact the WebAdMIT for AMCAS support team.** 

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

Important: Once you submit the Schedule Interview activity for activation, you can no longer edit it. Submit only when you are sure that the activity is complete and you have reviewed for accuracy. If you need to make edits after submission, contact the WebAdMIT for AMCAS support team. Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

#### Offer Extension

In this section, you can configure the Extend Offer activity to extend online admissions offers. Applicants can then accept or decline the offer via the Applicant Gateway. Offer acceptance is updated in real-time in WebAdMIT for AMCAS.

To configure, click the **Extend Offer** link on the Applicant Gateway Editor page.

Example of Extend Offer Activity



#### Create Introductory and Finishing Text

The text you include in the Activity Introduction displays to the applicant before they accept or decline the offer.

The text you include in the Finishing Statement displays when the applicant accepts or declines the offer. You can create a different Finishing Statement depending on if the applicant accepts or declines the offer. You can use these spaces to explain the timeframes in which the admissions team reviews the information or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the **Activity Introduction**.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the **Finishing Statement** you want to display if the offer is accepted.
- 4. In the next field, enter text that acknowledges the applicant accepted the offer.
- 5. Enter a header/title for the Finishing Statement you want to display if the offer is declined.
- 6. In the next field, enter text that acknowledges the applicant declined the offer.
- 7. Click Save.
- 8. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for accepting and declining offers. The **Activity Display Name** defaults to "Extend Offer" and the activity expiration defaults to 150 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 150 days from activation.
- **Number of Days from Activation**: Specify the number of days from activation the activity will expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to upload documents after the program's deadline date.

#### **Create Extend Offer Question**

- 1. In the **Question** field, enter the text that will prompt applicants to accept or decline the offer. If you already have a question configured, click the pencil icon to edit it.
- 2. The **Answer Options** display as Accept or Decline and cannot be edited. Click **Save**.

#### **Submit for Activation**

Once you complete all required fields and save your Extend Offer activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, **contact the WebAdMIT for AMCAS support team.** 

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Extend Offer activity for activation, **you can no longer edit it.** Submit only when you are sure that the activity is complete and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

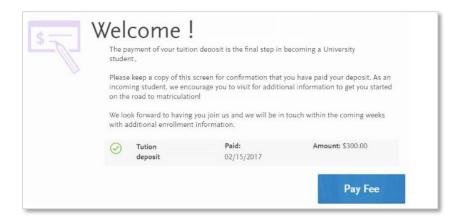
#### **Fee Collection**

In this section, you can configure the Fee Collection activity to collect tuition deposits via single or multiinstallment payments (maximum of 10) if the applicant accepts an admission offer. Applicants can then pay the deposit via secure, PCI-compliant credit card transaction.

Payment is configured via the Applicant Gateway and is available in conjunction with TouchNet, CashNet, and PayPal. For more information, see Section 6: Configuring Payments.

To configure, click the **Fee Collection** link on the Applicant Gateway Editor page.

#### Example of Fee Collection Activity



#### Create Introductory and Finishing Text

The text you include in the Activity Introduction displays to the applicant before they submit a fee payment.

The text you include in the Finishing Statement displays when the applicant submits a fee payment. You can use this space to explain the timeframes in which the admissions team reviews the information or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the **Activity Introduction**.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the Finishing Statement.
- 4. In the next field, enter text that acknowledges the applicant successfully submitted a payment.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for submitting fee payments. The **Activity Display Name** defaults to "Fee Collection" and the activity expiration defaults to 60 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 60 days from activation.
- Number of Days from Activation: Specify the number of days from activation the activity will
  expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to upload documents after the program's deadline date.

#### **Add Payments**

- 1. Enter a name for the payment, such as Tuition Deposit.
- 2. Enter the fee amount associated with the payment. This must be entered as a whole number with no decimal points (e.g. \$150 not \$150.00).
- 3. Select whether there is a deadline for the payment or if it can be submitted on a rolling basis.
- 4. If you select **Deadline**, enter a deadline date or select from the calendar picker.
- 5. The text above the **Payment Name** field automatically populates with the text that appears for the applicant; confirm that it displays correctly.
- 6. Click + Payment to add more payments, as needed.
- 7. Click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Fee Collection activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, **contact the WebAdMIT for AMCAS support team.** 

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Fee Collection activity for activation, **you can no longer edit it.** Submit only when you are sure that the activity is complete and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

#### **Document Collection**

In this section, you can configure the types of documents you want to collect from applicants. Examples may include supplemental essays, financial aid statements, etc.

To configure, click the **Collect Documents** link on the Applicant Gateway Editor page.

Example of Document Collection Activity



#### **Create Introductory and Finishing Text**

The text you include in the Activity Introduction displays to the applicant before they upload documents. You can use this space to describe how your program uses the information provided by the applicant and how to contact your admissions department.

The text you include in the Finishing Statement displays when the applicant completes the activity. You can use this space to explain the timeframes in which the admissions team reviews the information or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the **Activity Introduction**.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the Finishing Statement.
- 4. In the next field, enter text that acknowledges the applicant successfully completed the activity.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for uploading documents. Note that applicants can upload up to 5 MB per document. Accepted file formats include Microsoft Word (.doc or .docx files), JPG, PNG, RTF, PDF, and TXT. The **Activity Display Name** defaults to "Collect Documents" and the activity expiration defaults to 60 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 60 days from activation.
- **Number of Days from Activation**: Specify the number of days from activation the activity will expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to upload documents after the program's deadline date.

#### **Add Documents**

- 1. Click + Document.
- Enter the document type (e.g. financial aid documents) and click Add. Note that only the first 15 characters will display in the Applicant Gateway Documents panel in WebAdMIT for AMCAS so ensure that the name clearly identifies the document.
- 3. Use the **Request** toggle next to the document type in the Documents section to define whether it is required.
  - a. If the document is required (indicated by a green checkmark), select the minimum number of documents of that type that the applicant must upload from the Min Required drop-down. For example, if you select 2 for a Personal Essay document type, applicants must upload two separate personal essays.
  - b. If the document is optional (indicated by a grey x), select the maximum number of documents of that type that applicants can upload from the **Max Allowed** drop-down. For example, if you select 5 for a Personal Essay document type, applicants can upload up to five separate personal essays.
- 4. Add more document types, as needed.
- 5. Click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Collect Documents activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, contact the WebAdMIT for AMCAS support team.

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Collect Documents activity for activation, **you can no longer edit it.**Submit only when you are sure that the activity is complete and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

### **Prerequisites**

In this section, you can configure the prerequisite courses, credits, and grades required for entry to your program. Applicants will then self-identify which courses they feel meet your program's prerequisite coursework requirements. Additionally, a Prerequisite GPA will be calculated and available in WebAdMIT (but it can't be edited).

You can add instructions that help guide applicants through selecting their prerequisites. Keep in mind that applicants can:

- Match more than one course to a prerequisite. This allows programs to require more than one class to complete a single prerequisite.
- Match the same course to multiple prerequisites.
- Choose not to map any courses to a prerequisite.

To configure, click the **Prerequisites** link on the Applicant Gateway Editor page.

Example of Prerequisite Activity



#### **Create Introductory and Finishing Text**

The text you include in the Activity Introduction displays to the applicant before they select prerequisites. You can use this space to describe how your program uses the information provided by the applicant and how to contact your admissions department.

The text you include in the Finishing Statement displays when the applicant completes the activity. You can use this space to explain the timeframes in which the admissions team reviews the information or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the **Activity Introduction**.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the **Finishing Statement**.
- 4. In the next field, enter text that acknowledges the applicant successfully completed the activity.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for listing prerequisites. The activity expiration defaults to 60 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 60 days from activation.
- Number of Days from Activation: Specify the number of days from activation the activity will
  expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to submit prerequisites after the program's deadline date.

#### **Add Prerequisites**

- 1. Click + Prerequisite.
- 2. Enter the following details for each course.
  - Title: Enter a descriptive title (e.g. "Chemistry Lab" not CHEM 101L).
  - **Description**: Enter a description that is 255 characters or less (e.g. "Chemistry Lab courses must be for science majors and taken within the last 5 years to fulfill our requirements.").
  - **Minimum Grade**: Enter a number from 0-4, including 2 digits after the decimal point (e.g. 2.50).
  - Minimum Credits: Enter a number from 0-4 without decimals (e.g. 3).
- 3. Click + Prerequisite to continue adding courses as needed.
- 4. Click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Prerequisites activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, contact the WebAdMIT for AMCAS support team.

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Prerequisites activity for activation, **you can no longer edit it.** Submit only when you are sure that the activity is complete, and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

#### **Applicant Updates**

Note that updates to Prerequisites are reflected in WebAdMIT when an applicant performs any of the following actions:

- Makes selections for all Prerequisites and clicks Complete Activity.
- Makes selections for some Prerequisites, clicks Save & Exit, and then completes any other
  activity in the Applicant Gateway (e.g., Documents, Competencies, etc.).
- Updates and saves their AMCAS application.

Therefore, some Prerequisites may appear to be fulfilled (and show fulfillment dates) with matched coursework even if the applicant has not yet completed the entire Prerequisites activity.

### Competencies

In this section, you can configure the competencies required for entrance to your program. Applicants will then self-identify which experiences they feel meet your program's competency requirements.

You can add instructions that help guide applicants through matching their experiences to your competencies. Keep in mind that applicants can:

- Match more than one experience to a competency.
- Match the same experience to multiple competencies.
- Choose not to match any experiences to a competency.

To configure, click the **Competencies** link on the Applicant Gateway Editor page.

#### Example of Competency Activity



#### **Create Introductory and Finishing Text**

The text you include in the Activity Introduction displays to the applicant before they select competencies. You can use this space to describe how your program uses the information provided by the applicant and how to contact your admissions department.

The text you include in the Finishing Statement displays when the applicant completes the activity. You can use this space to explain the timeframes in which the admissions team reviews the information or any additional steps the applicant needs to complete.

- 1. Enter a header/title for the **Activity Introduction**.
- 2. In the next field, enter your introduction text.
- 3. Enter a header/title for the Finishing Statement.
- 4. In the next field, enter text that acknowledges the applicant successfully completed the activity.
- 5. Click Save.
- 6. Click **Continue** to move to the next section.

#### **Create Instructions**

In this section, you can add instructions for matching competencies. The activity expiration defaults to 60 days, but you can adjust this setting in the **Activity Expiration** drop-down. The following options are available:

- **Default Expiration**: Use the default of 60 days from activation.
- Number of Days from Activation: Specify the number of days from activation the activity will
  expire.
- Calendar Date: Enter a date on which the activity will expire.
- Rolling: Activity will not expire, and applicants can submit it on a rolling basis.

Note that expired activities are not visible to applicants. You can also opt to allow applicants to submit competencies after the program's deadline date.

#### **Add Competencies**

- 1. Click + Competency.
- 2. Enter the following details for each competency.
  - **Title**: Enter a descriptive title (e.g. "Community Service").
  - **Description**: Enter a description that is 255 characters or less.
  - **Minimum Hours**: Enter the minimum number of hours an applicant must complete to fulfill the competency.
- 3. Click + Competency to continue adding competencies as needed.
- 4. Click Save.

#### **Submit for Activation**

Once you complete all required fields and save your Competencies activity, click **Submit for Review** to submit it to the WebAdMIT for AMCAS Support team for activation. A success message displays.

The WebAdMIT for AMCAS Support team will then activate the Applicant Gateway activity within two business days. If you need your activity activated as soon as possible, contact the WebAdMIT for AMCAS support team.

Once activated, the activity is available the next morning and can be assigned to applicants in WebAdMIT for AMCAS.

**Important:** Once you submit the Competencies activity for activation, **you can no longer edit it.** Submit only when you are sure that the activity is complete, and you have reviewed for accuracy. **If you need to make edits after submission, contact the WebAdMIT for AMCAS support team.** Requests for edits will be reviewed on a case by case basis. Please note that in most cases changes cannot be made.

To contact the WebAdMIT for AMCAS support team, call 617-612-2049 or email webadmitamcassupport@liaisonedu.com.

#### **Applicant Updates**

Note that updates to Competencies are reflected in WebAdMIT when an applicant performs any of the following actions:

- Makes selections for all Competencies and clicks Complete Activity.
- Makes selections for some Competencies, clicks **Save & Exit**, and then completes any other activity in the Applicant Gateway (e.g., Documents, Prerequisites, etc.).
- Updates and saves their AMCAS application.

Therefore, some Competencies may appear to be fulfilled (and show fulfillment dates) with matched experiences even if the applicant has not yet completed the entire Competencies activity.

# **Section 5: Activity Statuses**

Applicant Gateway activities can be in the following statuses:

- **Draft** means that this is a new, fully-editable Applicant Gateway. It has not been sent to the WebAdMIT for AMCAS Support Team for activation. It is not yet available to assign to applicants.
- Ready for Review means that the Applicant Gateway was submitted for activation by the WebAdMIT for AMCAS Support Team. It is currently locked and only the WebAdMIT for AMCAS Support Team can make changes.
- **Active** means that the Applicant Gateway was activated. Active Applicant Gateways can be assigned to applicants via WebAdMIT for AMCAS.

# Section 6: Configuring Payments

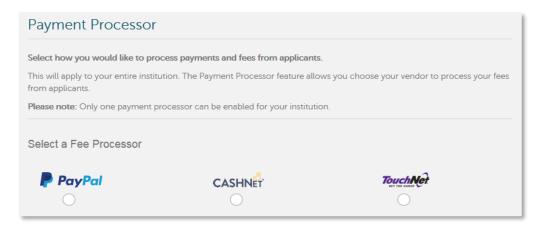
If you activated the Fee Collection or Supplemental Application activities in the Applicant Gateway Editor, applicants can submit payments to your program through the Applicant Gateway. The Applicant Gateway allows organizations to use PayPal, CashNet, or TouchNet as their payment service. This configuration must be completed to receive payments.

# **Preparing to Receive Payments**

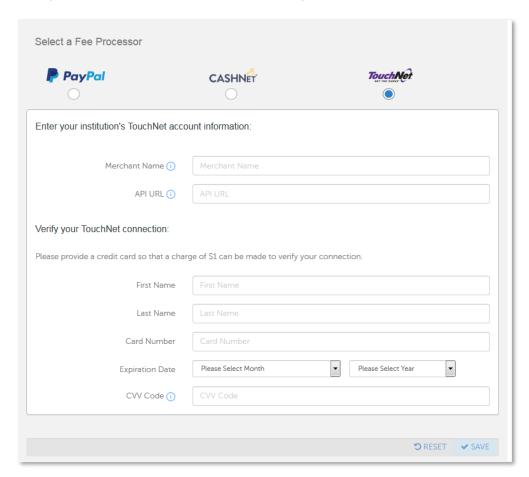
Click the **Payment Processor Selection** icon on the Applicant Gateway Editor page.



Next, select your desired Payment Processor.



Enter your account information for the selected processor.



Contact your vendor for assistance with what parameters to enter.

Once you've completed the form, a success message appears.



To verify a functioning connection, a \$1.00 charge will be made to your account.

# **Payment Vendors**

#### PayPal

Liaison is pleased to coordinate the following PayPal onboarding process for our clients. To get started, request that Liaison schedule an introductory phone call between your team and PayPal. During this call, the PayPal team will explain the features and benefits of PayPal Payflow Pro credit card processing. If you're interested in implementing PayPal Pro, provide Liaison with the following information:

- Annual Visa, MasterCard, American Express, and Discover card transaction volume
- Average ticket value and total annual processing value
- Description of the product or service sold and the buyers (i.e., consumers, B2B, domestic, international)
- 2-3 months of credit card processing statements (during peak processing months) from your current processor
- Any gateway, statement, chargeback, or other fees

PayPal will then create and present a credit card processing proposal that includes:

- A description of the PayPal services to be provided
- PayPal processing rates for Visa, MasterCard, American Express, and Discover
- A comparison of the effective rate of PayPal versus the current processor

If you accept the proposal, PayPal will arrange a call with a client administrator and the PayPal account manager to set up your account. The request is then submitted to PayPal's underwriting team who may request recent annual financials (including your Income Statement, Cashflow Statement, Balance Sheet, and recent bank statements that show cash balance) to better understand your business and financials.

Once the underwriting team approves the account, it will be activated and available for testing. We recommend that you develop a plan to test a variety of use cases. Once testing is complete, the account is ready to launch. We recommend launching early in the week and not on a Friday. PayPal's support team will be available to help during the testing and launch process. Upon launch, a dedicated PayPal team will be available for ongoing service and support.

#### CashNet

For more information on CashNet, please refer to the information below.

Jim Majka, Business Development and Partnerships

James.majka@blackboard.com

#### **TouchNet**

For more information on TouchNet, please refer to the information below.

Brian Prosser, Business Development

brian.prosser@touchnet.com

(913)-599-6699 (office), (913)-310-1205 (direct)

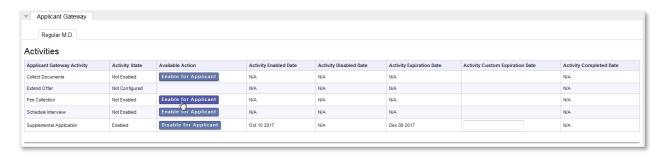
15520 College Blvd

Lenexa, KS 66219

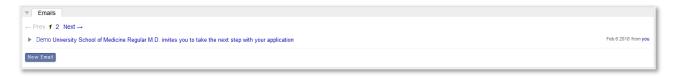
# Enabling Fee Collection in WebAdMIT for AMCAS

Once the Fee Collection activity is activated, Fee Collection appears as an option to enable in the WebAdMIT **Applicant Gateway** panel for applicable applicants.

On an **Applicant Details** page, scroll down to the appropriate **Activities** subpanel, and click **Enable for Applicant** on the Fee Collection line.



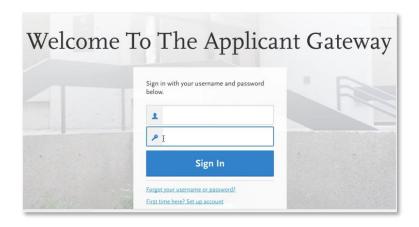
This action sends an email to the applicant, inviting them to complete this activity. To see emails that were sent, view the **Emails** panel.



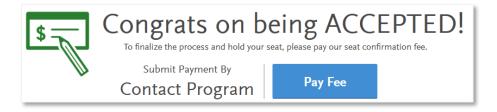
# **Applicant Payments**

#### **Fee Collection Payments**

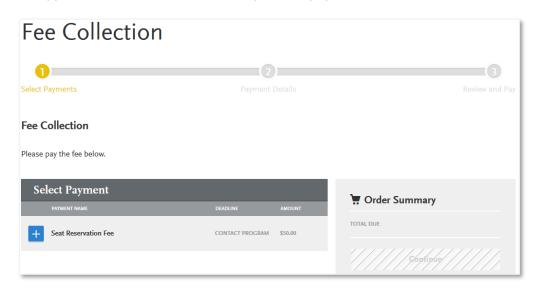
Once an applicant's Fee Collection activity is enabled, he or she may use the link in the email notification to navigate to the Applicant Gateway. They then click the **First time here? Set up account** link to create an account.



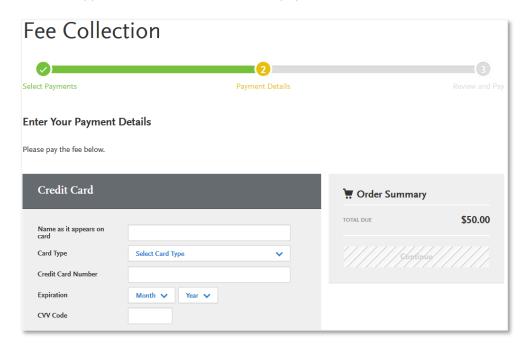
After logging in, the applicant clicks Pay Fee.



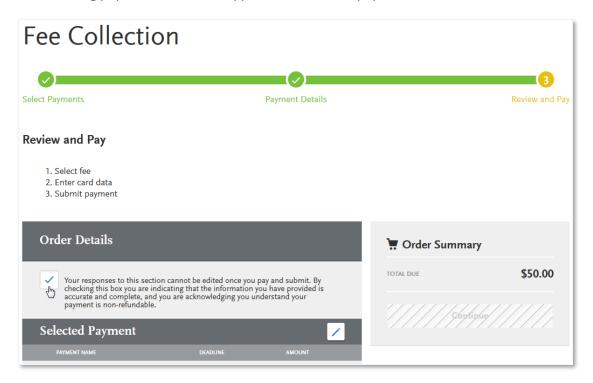
The applicant then selects the fee(s) they wish to pay.



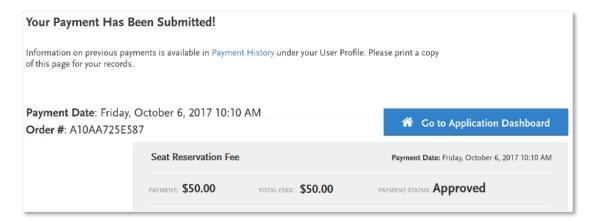
Then, the applicant clicks **Continue** to enter payment details.



After entering payment details, the applicant reviews the payment and confirms the order.

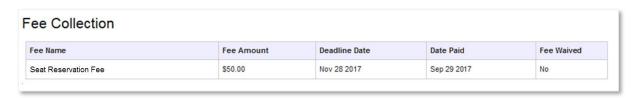


Once the payment is made, the applicant receives confirmation.



#### Viewing Fee Collection Payments in WebAdMIT

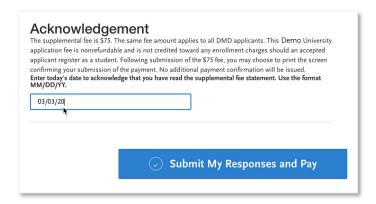
Once the applicant has completed payment through the Applicant Gateway, WebAdMIT will reflect the activity as completed, and the **Fee Collection** panel will update.



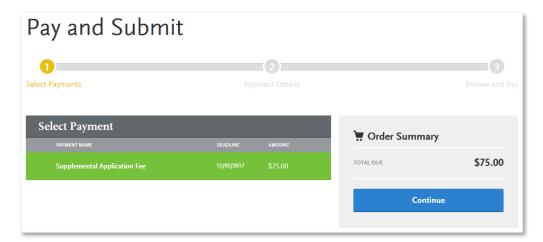
This information also becomes available to query for in the List Manager and export in the Export Manager.

#### **Supplemental Application Payments**

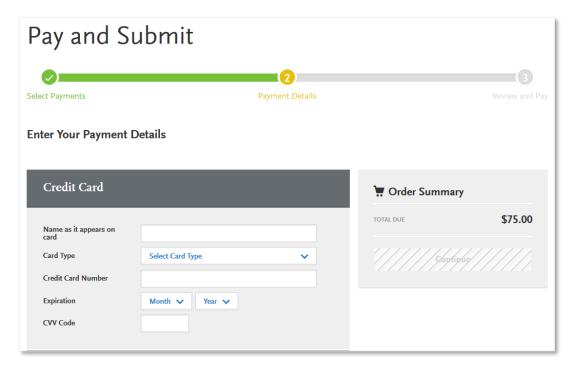
Once an applicant's Supplemental Application activity is enabled, he or she may use the link in the email notification to navigate to the Applicant Gateway. After logging in, the applicant responds to any questions you've associated with the fee, and clicks **Submit My Responses and Pay.** 



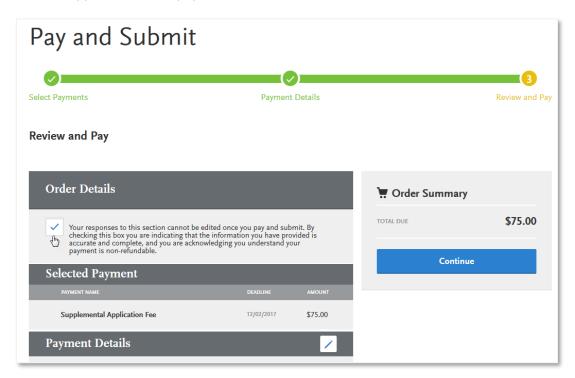
Next, on the Pay and Submit page, the applicant selects the payment and clicks Continue.



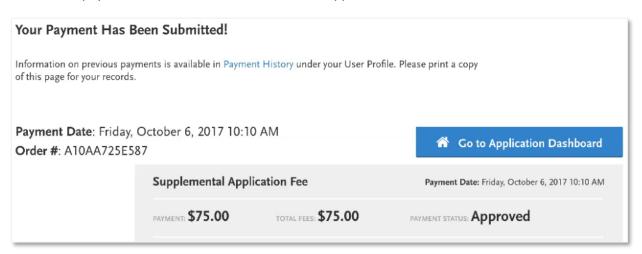
The applicant then enters payment information and clicks Continue.



Next, the applicant reviews payment details and clicks Continue.



Once a valid payment has been made, a confirmation appears.



### Viewing Supplemental Application Payments in WebAdMIT

Once the applicant has completed payment through the Applicant Gateway, WebAdMIT will reflect the activity as completed, and the **Supplemental Application Payment** panel will update.



Supplemental Application Payment					
Fee Name	Fee Amount	Deadline Date	Date Paid	Fee Waived	
Supplemental Application Payment	\$75.00	Jul 31 2017	Jul 16 2017	No	

This information also becomes available to query for in the List Manager and export in the Export Manager.

# Section 7: Managing Applicant Gateway Activities

Once your Applicant Gateway activities are configured, you can manage them via WebAdMIT for AMCAS.

# **Enabling Activities for Applicants**

Once AAMC approves and activates your program's Applicant Gateway, you can enable them for your applicants via WebAdMIT for AMCAS. You can enable activities for a single applicant or for a group of applicants.

Applicants receive an email each time an activity is enabled for them. The email contains brief instructions and a link to your program's Applicant Gateway. A record of this email is available in the **Email** panel in WebAdMIT for AMCAS.

For more information on enabling activities in batch, see Section 4: Searching for Applicants in the WebAdMIT for AMCAS User Guide.

# **Monitoring Applicant Activity**

Use the **Applicant Details** page in WebAdMIT for AMCAS to monitor an applicant's status for your program's Applicant Gateway activities. Completed activities displays with a status of Completed. You can also see when activities were completed in the **Activity Completed Date** column.

The **Supplementary Application** panel displays the answers the applicant entered. If your program collects a fee for the Supplemental Application, the panel displays the amount paid, the date the fee was paid, and the deadline for the fee payment.

For more information on monitoring applicant activity, see Section 5: Viewing Applicant Information in the WebAdMIT for AMCAS User Guide.

#### **Overriding Activity Expiration Dates**

Each Applicant Gateway activity has a default expiration date that programs can adjust in the Applicant Gateway Configuration Manager during configuration. You can also override this expiration date for individual applicants in WebAdMIT for AMCAS.

- 1. Navigate to an applicant's **Applicant Details** page.
- 2. Select the desired date in the **Activity Custom Expiration Date** field.



An email is automatically sent to applicant alerting them of the new deadline.

# **Creating Lists for Applicant Activity**

Use the List Manager in WebAdMIT for AMCAS to create and export lists (including composite lists) of activities in your program's Applicant Gateway. For more information on creating lists, see Section 7: Working with Lists in the WebAdMIT for AMCAS User Guide.