

Using Admission Checklist Items to Create Applications

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

It is possible to configure, based on Admission Checklist Items, when an Admissions candidate should become an "Applicant" in Veracross.

This configuration option can be important for schools where a lot of thought goes into what differentiates a "real" applicant from someone who has maybe only done one or two steps, but hasn't submitted an application yet. This has implications for communications, for pipeline numbers in reports, and generally has an impact on how a school uses demographic and application data for many different processes.

On the Admission Checklist configuration, the option "Required For Application" gives schools control over which checklist items trigger the change for someone to become an Applicant in Veracross.

Details

As soon as every checklist item configured as "Required for Application" is "complete" for a given candidate in a given year, the system will instantly create an application record for this candidate, and their role will be updated from "Prospect" to "Applicant."

This configuration is **optional**.

If *any* checklist items are configured as "Required for Application," – even if there is only one checklist item configured for this – then this workflow will come into effect. If *no* checklist items are configured to be "Required for Application," then by default, the Application is created when the Student Questionnaire is completed. (Note that some schools may have slightly custom versions of this default logic. Consult the Veracross Account Manager if there is doubt surrounding whether default or custom logic is used.)

Common Use Case

A common example of how schools might use this:

- Checklist items representing the “Application fee” and the “Student Questionnaire” are configured as “Required for Application”. (Your school might additionally require another form, or a particular file like a report card, before someone should be considered an applicant).
- These checklist items are configured as “Applies to Prospects” so that they can be utilized and completed for Prospects on their way to becoming an Applicant.
- Families log into the Admission Portal and see only those two checklist items next to the name of a Prospect
- When the parent completes those two checklist items online in the admission portal, the child becomes an “Applicant” and the rest of the checklist is applied to them.

Additionally, when manually adding applications in Axiom, using this configuration means that admission staff do not need to click “Add Application.” When Required for Application is configured, schools only need to mark the few configured checklist items as “complete” to have the system update the candidate’s role from “Prospect” to “Applicant” and to have a full checklist and an Application to review and make an admission decision.

Important Implications to Consider

If your staff is interested in this feature, here are a few suggestions for “Best Practices” and requirements:

- Every checklist item that is “Required for Application” *must* also be configured as “Applies to Prospects.” (Other checklist items may also apply to prospects, even if they aren’t required for an application).
- If *any* checklist item is “Required for Application,” then at least one checklist item that is “Required for Application” *must* be configured to apply to each prospect. It would be a significant misconfiguration if there were any “Required for Application” checklist items applied to *some* grade levels but no “Required for Application” checklist items for other grade levels. The same point should be made about other filtering options besides grade level as well, such as filtering using Domestic vs. International: if checklist item filtering results in some candidates not receiving a “Required for Application” checklist item, this misconfiguration should be fixed.
- For schools using the Veracross Admission Portal, all “Required for Application” checklist items should be visible and updateable in the Admission Portal.
- Consider: Are there certain checklist items that must always be completed for a candidate to be moved along from “Prospect” to “Applicant” in your school’s processes?
- Consider: Meet with your Account Manager before configuring this. Depending on your school’s

checklist and configuration, this change may be simple, or it may be complicated and require a discussion before making any changes.

Note on Obsoleting Checklist Items

Obsoleting checklist items before the active admissions year had advanced has implications: To take an example, say there are five checklist items that are “Required for Application.” Then, later that year, after you have finished processing applications for the current year, you decide to obsolete one of those five items. If you have not yet updated the Active_Admissions_Year to the following year, anyone who has completed the other four checklist items will be upgraded to Applicant and have a completed application in the system even though they never completed that fifth item. This will completely throw off admissions numbers for the current year.
