
UNIVERSITY OF HAWAI'I SYSTEM

ADMISSIONS BY LIAISON - RESIDENCY REVIEW

COMMUNITY COLLEGES

Last Updated June 4, 2020

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Getting Started with Admissions by Liaison

Accessing Admissions as a New User

Once access has been granted, you will receive an email invitation to log in, then you will be able to proceed to create your account. To do so:

1. Follow the link in the email to the account page.
2. Complete the password form and click **Create Password**.

You have been invited to University of Hawai'i System Inbox X



Admissions Support <support@slideroom.com>
to me ▾

Click <https://hawaii-university-system.admissionsbyliaison.com/#/accept-invite/a0751be4-e33a-4958-9b2b-a20fa2063762> to sign up.



You have been invited to University of Hawai'i System.

Please login below.

Email Address

Password

Log In

[Forgot password?](#)



Frequently Asked Questions

1. What is Admissions by Liaison?

Admissions by Liaison is an admissions management and enterprise solution that allows you to review and organize your application data while managing your entire application process. You can also create reports, track your applicants' progress, and communicate with them along the way.

2. What are we using it for?

While Admissions by Liaison can manage the entire application process, for the launch of the new online application for the University of Hawai'i Community Colleges, Admissions by Liaison will be used primarily for residency review. In addition to residency review, admissions staff may review other aspects of the application, review test scores, and export data.

Resources

Admissions by Liaison Help Center

This help center provides the information you'll need to get up and running with Admissions By Liaison.

[Admissions By Liaison Help Center](#)

Your Liaison Account team

Client Success Manager	DeJeahn Brown	Dbrown@liaisonedu.com
Account Manager	Rebecca Barry	rbarry@liaisonedu.com

The UH Core Team

Merrissa Brechtel	Student Services Functional Lead	merrissa@hawaii.edu
Lynn Inoshita	Project Coordinator	inoshita@hawaii.edu
Kami Kato	Liaison to Council of Senior Student Affairs Officers	kamik@hawaii.edu
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Sherise Tiogangco	UHCC campus functional representative	sherise@hawaii.edu
Mandee Yonehiro	Banner Student Functional	mandeey@hawaii.edu

Questions for the core team? Please email UH-online-appl-core-team@lists.hawaii.edu

Navigating Admissions

This guide provides an overview of Navigating the Admissions by Liaison software.

Navigating the Dashboard

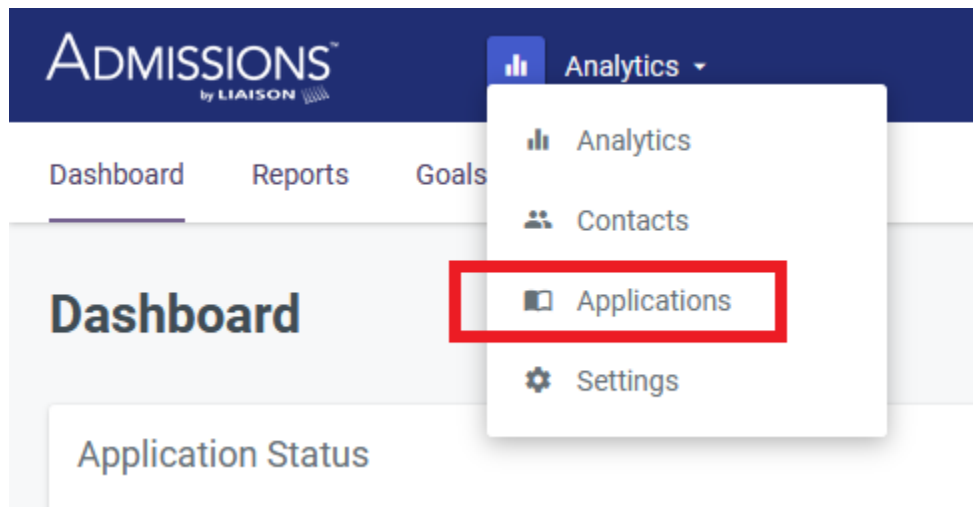
Upon logging in to Admissions by Liaison, you will be brought to the Dashboard.



- Dashboards provide you with charts to:
 - Readily view key information
 - Determine your progress on current Applications and identify what needs to be done
 - Easy navigation to the appropriate sections to continue working

Navigating the Applications Grid

To view the available applications in the Applications Grid, select Applications from the Navigation Menu.



The screenshot shows the Admissions by Liaison interface. At the top, a navigation menu (1) includes 'Applications'. Below it, a program selector (2) is set to 'All Programs'. A phase pipeline (6) shows counts for 'In-Progress' (253), 'Submitted Applications' (19), 'Calculated Residency Ready for Review' (184), 'Awaiting Additional Documents' (2), 'Residency Review Complete' (2), and 'Admissions Review Completed' (2). A search bar (4) is on the right. A list view (3) is active, displaying a table of applications. The table has columns for Name, Email, CAS Date Submitted (7), Campus Code, Program, Program Code, Residency (Calculated), and Citizenship Status (8). A filter icon (5) is on the left, and a segments count (9) is at the bottom left. A pagination bar at the bottom shows '1 - 20 of 253'.

Name	Email	CAS Date Submitted	Campus Code	Program	Program Code	Residency (Calculated)	Citizenship Status
testApplicant, Test	pgallagher@liaiso...		HAW	TEST Unclassifie...	ND-UNCL	0	Citizen (U.S.)
Cheng, Amaya	maitaisiu12@gm...	05/02/2020	WIN	Natural Science (...)	AS-NSCHCT	R	Citizen (U.S.)
King, Tiger	tigersrcool@maili...	05/18/2020	MAU	Natural Science (...)	AS-NSCI-PSC	0	U.S. Permanent R...
King, Tiger	tigersrcool@maili...	05/18/2020	MAU	Agriculture - Asso...	AAS-AG	0	U.S. Permanent R...
King, Tiger	tigersrcool@maili...	05/18/2020	MAU	TEST Unclassifie...	ND-UNCL	0	U.S. Permanent R...
TestHawaii24AU...	TestHawaii24AU...	04/24/2020	WIN	TEST Early Colleg...	ND-SPEA	0	U.S. Perm... R...
TestHawaii24AU...	TestHawaii24AU...	04/24/2020			ND-SPEA	0	U.S. Permanent R...

- Navigation Menu:** use this dropdown to switch between the different sections available in Admissions. Click **Applications** to access the Applications Grid.
- Program Selector:** use this dropdown to select which programs' applications you want to view. By default, all programs are displayed.
- List View / Map View:** use these buttons to switch between the view options:
 - List View:** this is the default view of the Applications Grid, allowing you to see a paginated list of your entire applicant pool, along with some information about each applicant.
 - Map View:** this option provides a visualization of where your applicants' locations. Use the **Map applications by...** toggle to switch between options, including birth location and current address.
- Find bar:** use this field to search for applications. You can search using names, e-mail addresses, or CAS IDs.
- Filters:** use the filters to query your applicant pool and isolate the subset of your choice.
- Phase Pipeline:** this area gives you a quick snapshot of your applicant pool, allowing you to see how many applications you have in each phase you've established. Click on any Phase to isolate the applications within it.
- Applicant List:** this area lists all applications or those that meet the filters you've established.
 - Click on any column header to sort by that column.
 - Click on any application record to see all its details or conduct a review.
 - Click on the checkboxes to select applications to complete one of the available actions.

8. **Grid Customizer:** this menu allows you to customize the columns that appear in the list view, or to reset back to the default view.
9. **Segments:** use this menu to isolate a specific segment of your applicant pool.

To perform a bulk action from the Applications Grid, click the checkbox next to the applicants' names.

For additional details regarding the tools listed above please visit the [Admissions By Liaison Help Center - Navigating the Applications Grid.](#)

Navigating an Application

From the Applications View, you can select an application to review by clicking on an applicant's name.

The screenshot shows the 'Applications View' for an applicant named Khloe Kardashian. The interface is annotated with numbered callouts (1-8) highlighting key navigation and information elements:

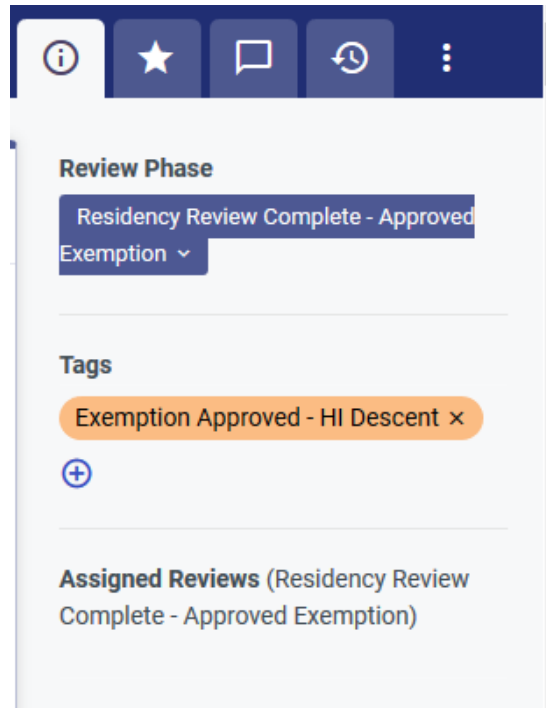
- 1:** Applications View navigation arrow.
- 2:** Applicant navigation arrows (2 of 47).
- 3:** Application Menu (SUMMARY).
- 4:** Applicant Summary (Name: Khloe Kardashian).
- 5:** Application Sections (Academic History, Residency).
- 6:** Review Phase (Residency Review Complete - Approved Exemption).
- 7:** Tags (Exemption Approved - HI Descent).
- 8:** Assigned Reviews (Residency Review Complete - Approved Exemption).

1. **Applications View:** Click **Applications** to return to the Applications Grid.
2. **Applicant Navigation:** use these arrows to navigate to the previous or next application within the segment you're viewing.
3. **Application Menu:** use this pane to jump to different sections of the application.
4. **Application Summary:** this section gives you a summary of the application, (ex. applicant's Demographics, Contact Information, etc.)
5. **Application Sections:** scroll through this area to review Personal Information, Academic History, Supporting Information, and other sections of the application.

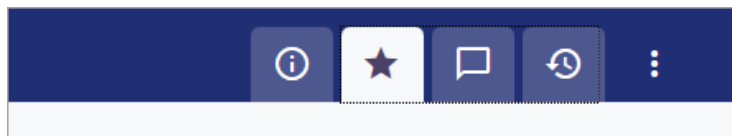
6. **Application Tabs:** use these tabs to switch between the various pane options. See below for a description of each tab and the **More Options** button.
7. **Review Phase:** review or change the applicant's **Residency Review Phase** using this dropdown.
8. **Tags:** use this area to add final residency status

Application Tabs

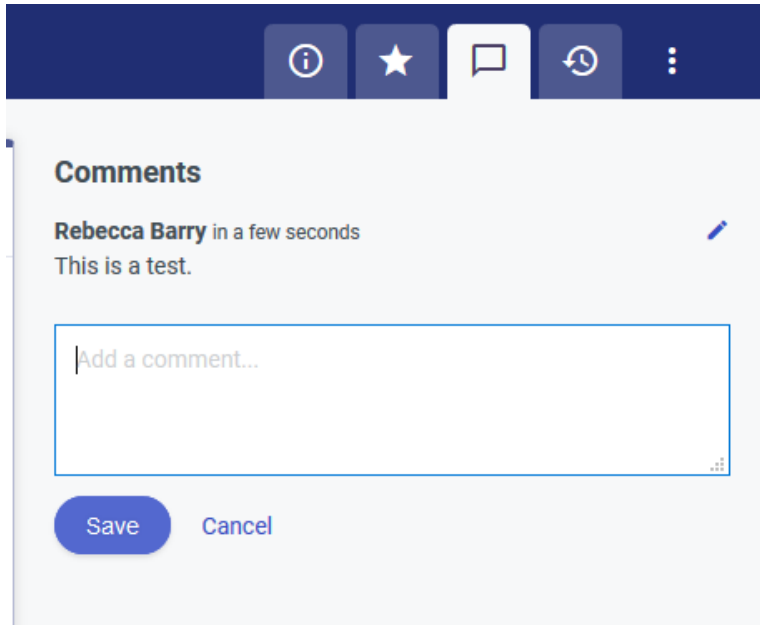
Information Tab: review this pane to see the applicant's Review Phase and Final Residency Review Tags.



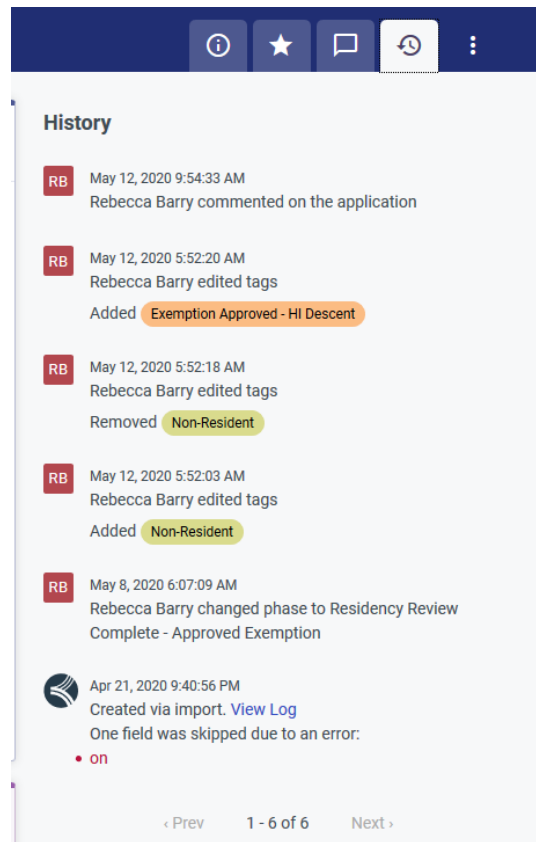
Review Tab: *This tab is not enabled for your account.*



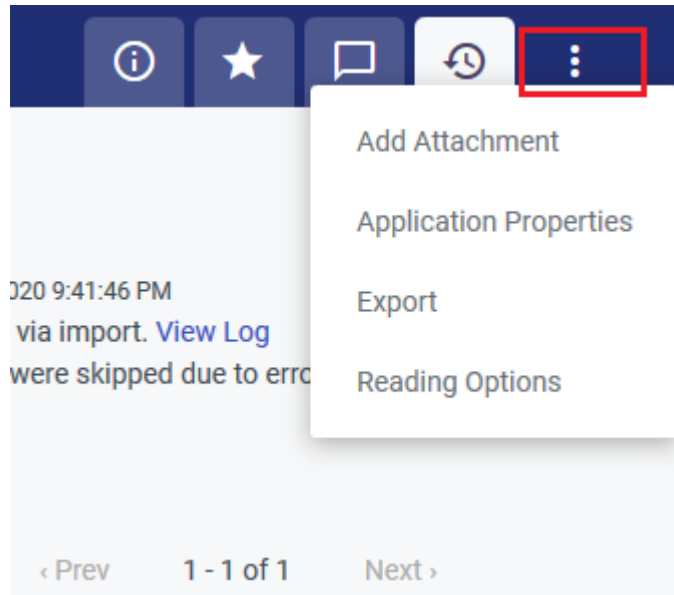
Comments Tab: use this pane to enter and review comments regarding the application. Other users at your campus will be able to see the comments you have entered.



History Tab: use this pane to review the history of updates made to the application.



More Options button: Use the **More Options** button to add attachments, review Application Properties, export the application or adjust the Reading Options to change your view.



Add Attachment	Upload a document to be associated with the applicants file.
Application Properties	Quick preview of Custom application properties. Application Status, CAS ID, Date submitted etc.
Export	Export a single application either in a canned export format or a customized export format.
Reading Options	Turn "Condensed" reading option on to hide unanswered questions and options.

Using Segments

Segments allow you to isolate and work with groups of applicants based on the criteria of your choice. Segments also function as Composite Lists, as they allow you to combine other Segments as desired.

The UH core team has created the following segments for you. These can be located within the left hand navigation when on the [Application grid](#).

(O)Submitted	Submitted Applicants with a Residency Status of O
(N) Submitted	Submitted Applicants with a Residency Status of N
(R) Submitted	Submitted Applicants with a Residency Status of R
17 years or younger - Submitted Applicants	Submitted applicant under the age of 18
Applications Fee Waived	Submitted applicants that had their application fee waived (CC only)
Applications Paid Fee	Submitted applicants that paid the fee (CC Only)

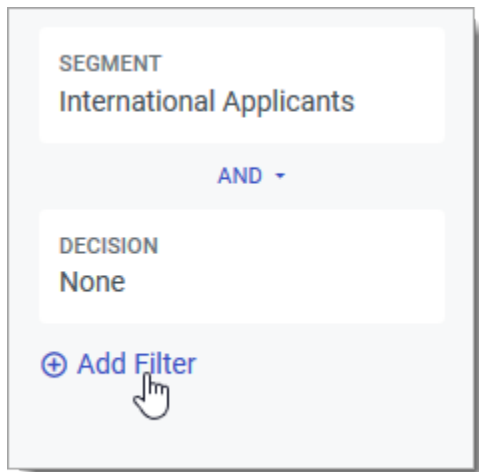
Dual Enrollment (ND-SPEA) - Submitted Applications	Applicants that have submitted to ND-SPEA program
Dual Enrollment (ND-SPEA) - In-Progress Applications	Applicants that have selected but not submitted to ND-SPEA program
Citizen of Eligible Pacific Island District - Submitted Exemption	Submitted Applicant that selected Exemption "I am a citizen of an eligible Pacific Island district, commonwealth, territory, or insular jurisdiction, state, or nation which does not provide public institutions of higher education that grant baccalaureate degrees."
Eligible use of Post 9-11_Chapter 30-33 - Submitted Exemption	Submitted Applicant that selected Exemption "I am eligible to use Post 9-11 (Chapter 33) or Vocational Rehabilitation and Employment (Chapter 31) or Montgomery GI Bill - Active Duty (Chapter 30)."
Employee at UH - Submitted Exemption	Submitted applicant that selected Exemption "I am a full-time employee (or spouse, domestic partner, or legal dependent) of the University of Hawai'i."
Member or Dep of US Armed Forces in HI - Submitted Exemption	Submitted applicant that selected Exemption "I am a member of the Hawaii National Guard or Hawaii-based Reserves."
HI Descent - Submitted Exemption	Submitted applicant that selected Exemption "I am of Hawaiian Descent."
HI Nat Guard or HI Based Reserves - Submitted Exemption	Submitted applicant that selected Exemption "I am a member or authorized dependent of a member of the U.S. armed forces on active duty stationed in Hawaii."
In-Progress Applications	Applicants that are in-progress and have not submitted
Submitted Applicants - Not in any Phase	Submitted applicants who have not been entered into the residency review phase process or beyond. "Newly" submitted applicants.
Non-Resident App fees owed	Applicants who had submitted using a fee waiver but were reviewed to be Non-Residents (CC Only)
Freshman (F) Student Type - Submitted	Submitted applicant who is a first-time freshman
Returning (R) Student Type - Submitted	Submitted applicant who is a returning student
Transfer (T) Student Type - Submitted	Submitted applicant who is a transfer student

Filters

You can add filters to view specific sets of applications. For example, you can filter for all applications to a specific term, all applications within one of the Segments you've created, or all applications that meet a specific set of academic criteria.

To add a filter, click **Add Filter**. Select the type of filter you want to use, select any applicable data, and click **Apply**. The Application Grid refreshes, revealing the matching applications.

You can add more filters, as needed. Once two or more filters have been added, you can change the list operator from AND to OR by clicking the operator.



To remove a filter, hover your cursor over the filter and click the minus sign that appears.

For a detailed explanation of using filters please visit our Help Center : [Using Filters on the Application Grid](#)

Phases

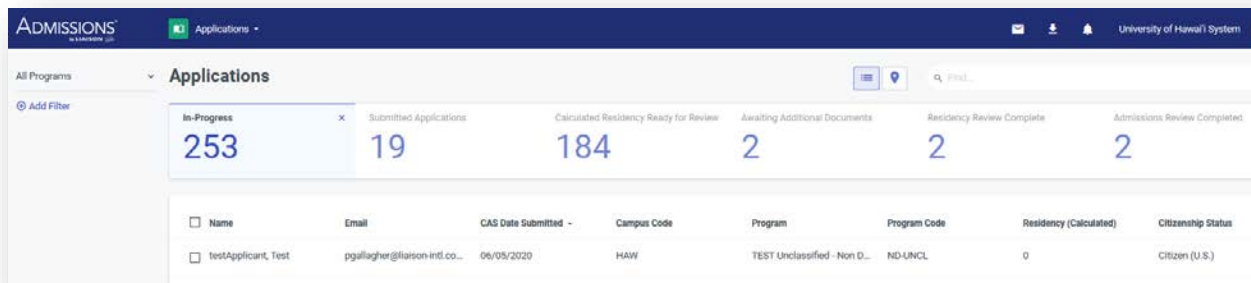
Phases are different periods during the application term. Phases are used to organize applicants, corresponding with their current status of residency review with your institution. An applicant can only be in one phase at a time.

Please Note: An applicant can not be in more than one phase at a time.

Using Phases on the Applications Grid

The Phase Pipeline is a summary of your applicant pool that allows you to see where applications are in the residency review process.

Click the number under the Phase heading to filter the applications and display only the selected Phase. You can clear this Phase selection by clicking the X near the selected Phase.



Phase	Definition
In-Progress	Entire Applicant pool regardless of application status they may be in. Applicants in this phase are considered "untouched".
Submitted Applications	You would move all of your submitted applicants into this phase to determine who may be ready for review.
Calculated Residency Ready for Review <ul style="list-style-type: none"> Submitted (0) Need Review Submitted (N) Non-Resident Submitted ® Residents 	Using Segments an Admissions officer would move applicants into the correct Phase to identify who is ready for review in the following buckets: Calculated residency based on app responses = N, 0 or R
Awaiting Additional Documents	If you need to review additional documentation before you can confirm an applicant's residency you can put them in this Phases a holding space.
Residency Review Complete <ul style="list-style-type: none"> Approved Exemption Approved Non-Resident Approved Resident 	Once the application has been reviewed and the official residency status has been tagged to the application you would move them into the official residency status.
Admissions Review Completed	Once official residency status is updated in Banner and you no longer need to review or work on the application, you would place them in this Phase.

Updating Phases using Segments

You may use Segments to move applicants into the correct Phase in bulk. You can access Segments in your Application Grid. Segments created for the Community Colleges are found under the Category Community College Workflow.

The screenshot displays the 'ADMISSIONS by LIAISON' interface. The main header shows 'Applications' with a dropdown menu. Below this, there are two summary cards: 'In-Progress Applications' with a count of 30, and 'Submitted Applications' with a count of 1. A table below these cards shows '20 selected' applicants, with columns for 'Name' and 'Email'. A dropdown menu is open, showing a search bar 'Search Segments...' and a list of segments. The segment 'Community College Workflow (20)' is highlighted with a red box. To the right, another view of the 'Applications' page is shown, with a dropdown menu for 'Current Segment (R) - Submitted' also highlighted with a red box. This view shows 'In-Progress' applications at 9 and 'Submitted Applications' at 0. Below this, a table lists applicants with columns for 'Name' and 'Email':

Name	Email
<input type="checkbox"/> Dog, Hot	hotdog@mailinator.com
<input type="checkbox"/> Hetti, Spag	spaghetti@mailinator.com
<input type="checkbox"/> Chips, Fish	fishchips@mailinator.com

To move a group of applicants into a phase select the applicants in bulk or select them individually on the Application grid after you have run your Segment. Then Choose 'Set Phase'.

In the example below I am trying to locate all of my recently submitted applicants that were calculated to be Residents. I will be moving them into the phase **Submitted Residents (R) Need Review** so they can be reviewed and approved before their final residency status is tagged.

ADMISSIONS[™] by LIAISON

Applications ▾

All Programs ▾ Applications

Current Segment (R) - Submitted

⊕ Add Filter

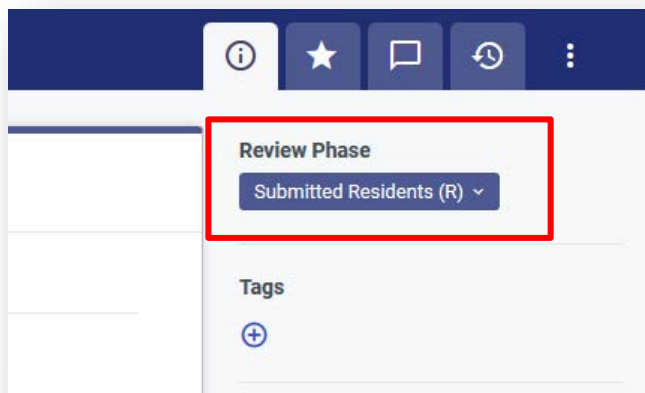
In-Progress	Submitted Applications	Calculated Residency Re
3	0	0

3 selected
 Set Phase
Tag
Chart
Export

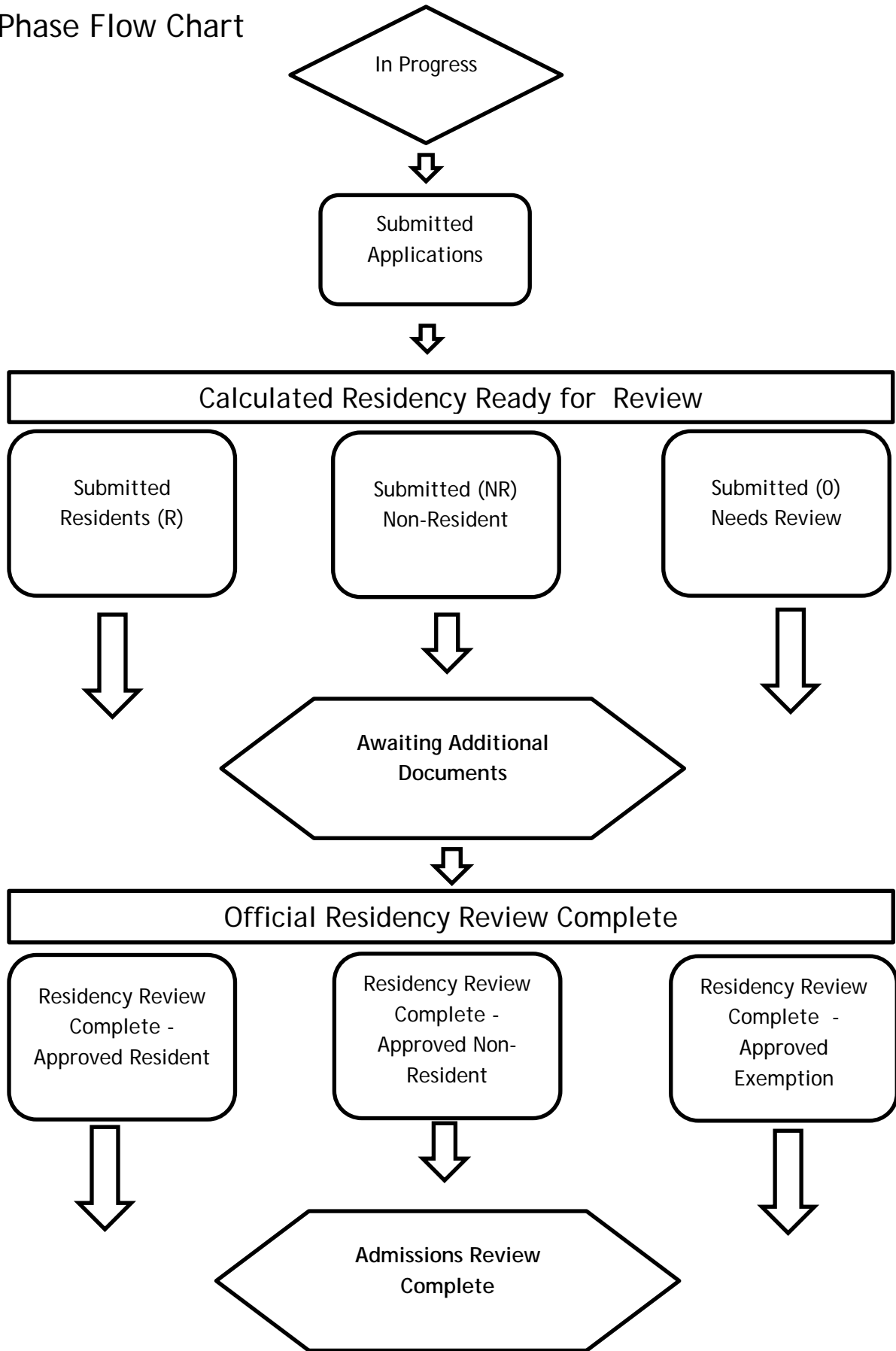
<input checked="" type="checkbox"/> Name ▾	Email	CAS Date Submitted
<input checked="" type="checkbox"/> Amos, Wally	FamousAmos12@gmail.com	05/26/2020
<input checked="" type="checkbox"/> Balasan, Raquel	RaquelBalasan12@gmail.com	05/26/2020
<input checked="" type="checkbox"/> Water, Spark	sparky@mailinator.com	05/19/2020

Updating a Single Applicants Phase

You can also update a single applicant's Phase as you work through your review. This action is completed on the [Application Tabs](#).



Phase Flow Chart



In- Progress Phase : Entire Applicant pool regardless of application status they may be in. All applicants start in the "In-Progress" Phase. Applicants in this phase are 'untouched' and have not been looked at by a member of the Admissions team.

1. An Admissions user would come into Admissions by Liaison portal and move all "Complete" applications into the "Submitted Applications" Phase.
2. Once an Admissions user is ready to begin their residency review, they will use Segments to move applicants into the correct residency bucket in the "Calculated Residency Ready for Review" Phase.
3. Now that an applicant is ready for review the Admissions user will review the residency status and additional details as they normally would. Once a final residency status is determined they can tag the official residency status and move the applicant into the "Official Residency Review Complete" Phase. If additional information is required they can be moved into the "Awaiting Additional Documents" Phase while you await their materials.
4. Once the Admissions decision has been determined they can move the applicant into the final "Admissions review Complete" Phase which will move them out of the phase process and into a holding bucket.

Tagging Final Residency Status

During the "Calculated Residency Ready for Review" phases you will be reviewing applicants in order to determine their official residency status. Once that status has been determined you can individually tag an applicant with their residency Status or you can tag applicants in bulk.

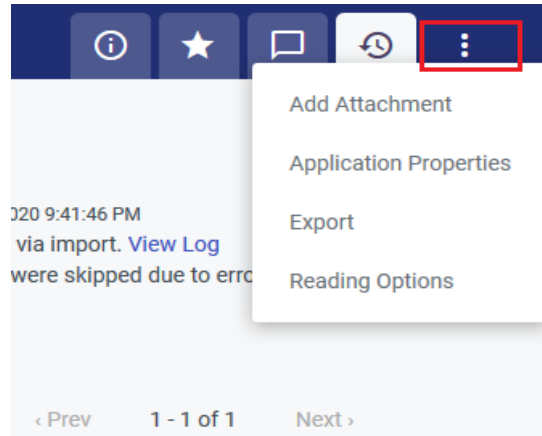
The screenshot displays the Admissions by Liaison portal interface. At the top, a navigation bar includes options for 'Email', 'Set Phase', 'Tag', 'Chart', and 'Export'. The 'Tag' option is highlighted with a red box. Below this, a modal window titled 'Tag 9 applications' is open, showing a search bar and a list of available tags. The tags include: 'Integration Test', 'Exemption Approved - HI Descent', 'Exemption Approved - Member or Authorized Dept Post 9-11 Chap (30-33)', 'Non-Resident', 'Resident of Hawaii', 'Exemption Approved - Citizen of Eligible Pacific Island District', 'Exemption Approved - Eligible to use Post 9-11 (Chap 30-33)', 'Exemption Approved - FT Employee UH', 'Exemption Approved - HI National Guard or HI based Reserves', and 'Exemption Approved - Member of US Armed Forces on active duty'. A red box highlights the 'Update Tags' button at the bottom of the modal. To the right, a 'Review Phase' modal is also visible, showing 'Residency Review Complete - Approved' and 'Exemption' status, with a red box highlighting the 'Tags' section which contains the 'Exemption Approved - HI Descent' tag.

Exporting a PDF

You can export the Application Summary Page on-demand when you need them.

To Export a Single applicants PDF

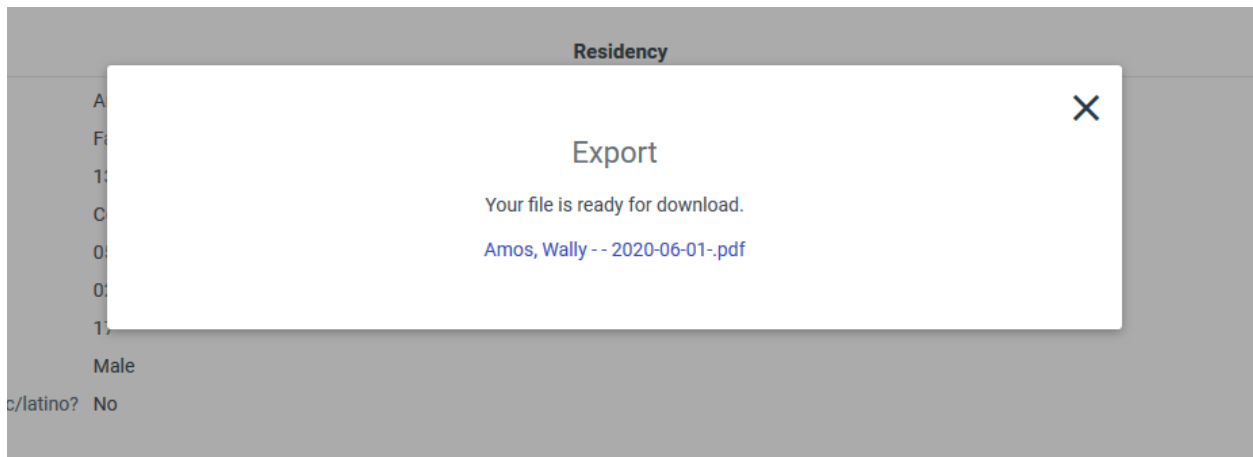
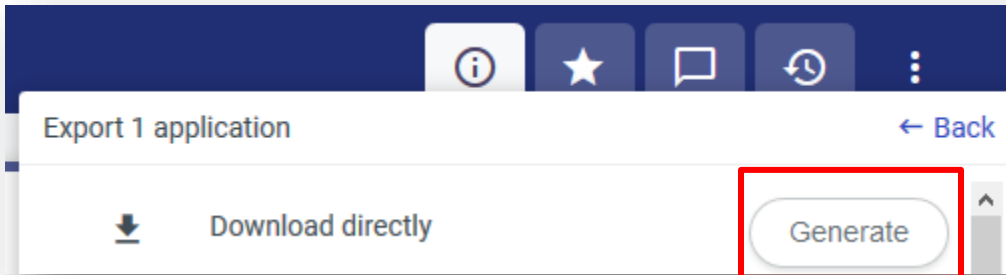
You can export a single applicant's PDF when reviewing an application. To do so, click the 3 dots (as shown below) and then click **Export**.



Select UHCC Application Summary



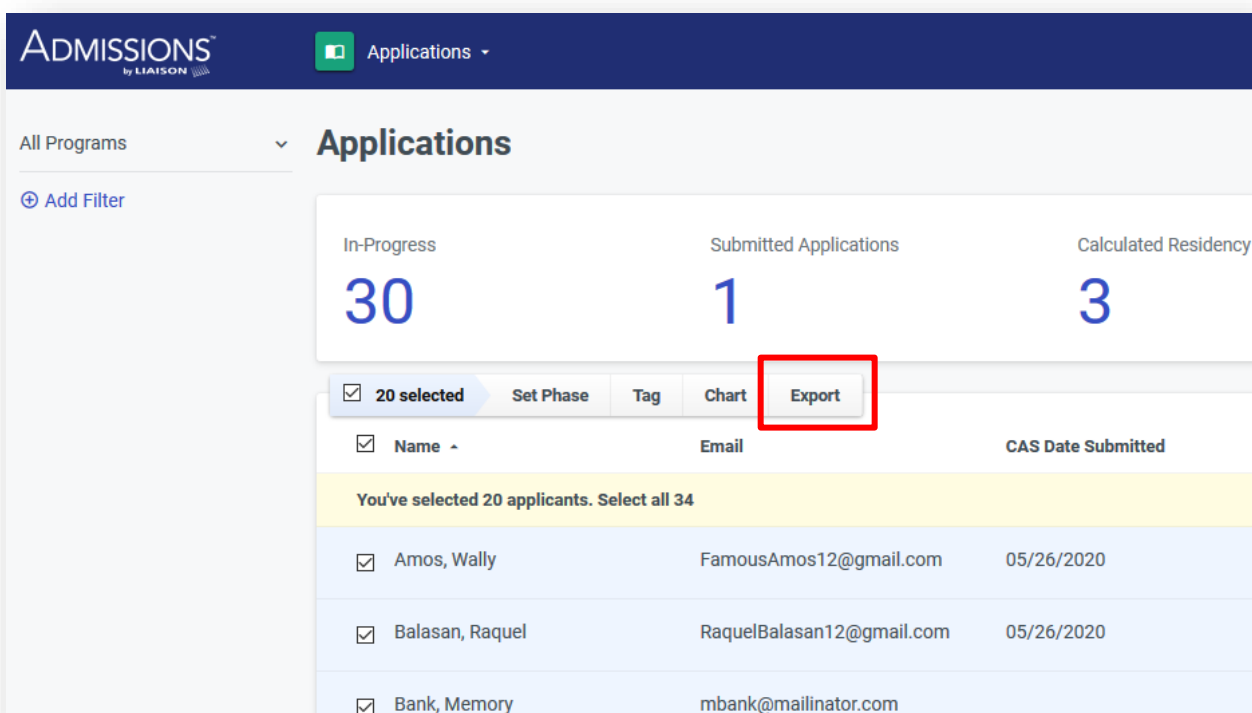
Select 'Download Directly', Generate. Once generated you can access the document by clicking the link on the screen.



To Export in Bulk

You can choose to export multiple application PDFs at one time.

1. Go to the [Applications view](#).
2. Filter to isolate your desired applicants, and select them using the checkboxes on the left. Use the checkbox at the top of the grid to select all the displayed applicants, or use individual checkboxes to select applicants one-by-one. Note- The filtered applicants are paginated, so using the Select All checkbox only selects the displayed applicants. To select the rest of the applicants that match your filters, click **Select all X applicants**.
3. Click the **Export** option.



The screenshot shows the 'Applications' view in the Admissions by Liaison system. At the top, there are three summary cards: 'In-Progress' with a count of 30, 'Submitted Applications' with a count of 1, and 'Calculated Residency' with a count of 3. Below these cards is a toolbar with a '20 selected' indicator and buttons for 'Set Phase', 'Tag', 'Chart', and 'Export'. The 'Export' button is highlighted with a red rectangle. Below the toolbar is a table with columns for 'Name', 'Email', and 'CAS Date Submitted'. A yellow banner above the table states 'You've selected 20 applicants. Select all 34'. The table lists three applicants: Amos, Wally; Balasan, Raquel; and Bank, Memory.

<input checked="" type="checkbox"/>	Name	Email	CAS Date Submitted
You've selected 20 applicants. Select all 34			
<input checked="" type="checkbox"/>	Amos, Wally	FamousAmos12@gmail.com	05/26/2020
<input checked="" type="checkbox"/>	Balasan, Raquel	RaquelBalasan12@gmail.com	05/26/2020
<input checked="" type="checkbox"/>	Bank, Memory	mbank@mailinator.com	

