Accessing Student Files
Accessing Student Files

- International.union.edu
- Click on “Log into existing applications” or
(Hint: Create a bookmark for this!)
Access Student Files

- You will need to create a list of the students you are tracking
- From the Applicant drop-down menu, select Advanced Search
Access Student Files

1. Select Application Parameters
2. Click Next
Access Student Files

Select Parameters:
1. User Classification: Union Only
2. Program Types (Important!): Program Enrollment
3. Application Cycles: All
4. Application Phase: Pre-Decision
5. Application Tags: Select all that apply (hold the ctrl button to select more than one tag). This will allow you to select only those students for whom you are responsible. If you do not see an application tag for your department, see the last slide for contacting the International Programs office.
6. Application Terms: All
7. Application Years: All

Continued on next slide
Access Student Files – continued

Select Parameters (continued from previous slide):

8. Program Status: Pending
9. Program: Union Programs not through International Programs
11. Scroll towards bottom of page to find the box Save Search Query and name this search, e.g. SRG – Summer 2017
Review an Individual File

- Next to student name, click on the red text under Program.
Required Paperwork

- Emergency Contact Information – entered online
- Self-Identification Form – uploaded online. This is for special accommodations/learning disabilities. If applicable, the student must submit the original form to Accomodative Services (Shelly Shinebarger, Reamer 303)
- Smart Traveler Enrollment Program (not required for international students traveling outside of the United States and students traveling within the United States) – entered online
- Health Insurance (only required for students traveling outside of the United States) – proof of purchased insurance uploaded online
- Student Health Information (optional) – entered online
- Passport Copy (only required for students traveling outside of the United States) – entered and uploaded online
- Participant Agreement – completed and uploaded online
- Alcohol & Drug Policy – digital signature
- Conduct Code – digital signature
- Sexual and Other Forms of Unlawful Harassment Policy – digital signature
Access Student Files / Required Paperwork

- Found under Materials tab
- Found under Questionnaires tab
Explanations

- **Status**: “Pending” status. All applications begin as “Pending”. Once a student completes all the paperwork for the program, you can go in and change this to “Processed”. This will still save the file but will remove it from the Query you open up.

- **Pre-Decision**: This is not applicable to your review and will never change. It was used to set up this program in the database.

- **Materials**: Refers to documents that were either digitally signed, called a Signature Document, or if we need the actual hard copy, it is called a Material Submission.

- **Questionnaires**: Refers to information the student directly entered online or was able to upload
Run an Audit on a Group

- To see how far along the students are in completing their paperwork, rather than checking one by one, you can run an audit.
- Go the Administrative home page.
Run an Audit on a Group

- Click on the name of the query you created (see slides 3-6)
Run an Audit on a Group

- From Progress Audit, select Pre-Decision
Run an Audit on a Group

- Under **Materials to Show**, select **Check All**.
- Under **Questionnaires to Show**, select **Check All**.
- Under **Other Options**, leave it blank.
- Scroll to bottom of screen, hit **Next**.
Audit Results

Batch Processing: Progress Audit

Following is a progress audit for signature documents, material submissions, questionnaires and recommendations.

<table>
<thead>
<tr>
<th>Status</th>
<th>Materials</th>
<th>Questionnaires</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Check All | Uncheck All

2015 - Winter Break - Union Programs not through International Programs

<table>
<thead>
<tr>
<th>Item</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Send Email to Marked - Export Options -
What to do with Audit Results

1. Send an email to students who have forms outstanding
2. Print the information
3. Export the results of the audit
Updating the Union Programs Non-IP Programs Query – Individual Student

- After a student has completed the required paperwork for your department, you can update the student status from **Pending** to **Processed**.
Updating the Union Programs Non-IP Programs Query – Individual Student

- After a student has completed the required paperwork for your department, you can update the student status from Pending to Processed
Updating the Union Programs Non-IP Programs Query – Batch Status Change

- Click on the name of the query you created (see slides 3-6)
Updating the Union Programs Non-IP Programs Query – Batch Status Change

- From Options, select Batch status change
Updating the Union Programs Non-IP Programs Query – Batch Status Change

- Select/Unselect the students whose status you want to change by clicking on the white triangle
- From the drop-down menu, **Change checked to:** select **Processed**
Reviewing Files that are Processed – Individual File

• If you need to go back to review the names, to find them you will need to do an advanced search by going to the Applicant drop-down menu and selecting **Advanced Search**

1. Select Application Parameters
2. Click **Next**
Reviewing Files that are Processed – Individual File

- If you need to go back to review one name, to find it, go to the Applicant drop-down menu and select Search

1. Under Applicant Name, enter all/part of the name
2. Make sure to check the box Include withdrawn applications
3. Press Search
Reviewing Files that are Processed - Group

1. From **Program Types**, select **Program Enrollment**
2. From **Application Select**, choose the term(s) [to select more than one term, hold down the control key and use the mouse to make selections],
3. From **Application Status** select **Processed**
4. Scroll down and from **Programs & Locations**, select **Union Programs not through International Programs**. Press **Search**.
Need Assistance?

For assistance in accessing TDS for Study Abroad contact:

Donna Sichak or Ginny Casper
International Programs Office
Old Chapel, 3rd Floor
Phone: 518-388-6002
Email: sichakd@union.edu
casperr@union.edu