WELCOME

Accessing Student Files
Access to Online Student Applications

From the Okta Dashboard (MyApps) select the TerraDotta – Study Abroad – International icon

YES NO

You will need to be on campus or logging in by VPN to access the database. If you need assistance, please contact ITS.
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* (or select a specific term. If need more than one, hold down the ctrl key)
4. Application Phase: *Pre-Decision*
5. Application Tags: Initially, select *Any* (pages 7-10 explain how to use this feature)
6. Application Terms: *All* (or select a specific term. If need more than one, hold down the ctrl key)
7. Application Years: *All* (or select a specific term. If need more than one, hold down the ctrl key)
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 – 18FA
Selecting Your Students

From this list, you can select the students for which you are responsible by going to the Options tab and selecting *Batch app tags*. 

*Continued on next slide*
Selecting Your Students - continued

To select your students, first click on the arrow/triangle to the left of the heading *Batch Application Tag Edit*:

You will see all the names. Similar screenshot seen below.

![Batch Processing: Information Results](image)
Selecting Your Students - continued

1. Uncheck Name
2. Select the students you for which you are responsible (e.g. Mech Eng, Math, SRG). If they have more than one application, looking at the term on the right may help determine which application to select.
Selecting Your Students - continued

Scroll to the bottom of the screen to select the appropriate tag (hold the `ctrl` button to select more than one tag). If you do not see an application tag for your department, see the last slide for contacting the International Programs office.

With this application tag, you can go create a new query (see page 5, point 5)
Review an Individual File

From your Administrative home page, select the Query you wish to review by clicking on the name you gave it.
Review an Individual File

Click on the program name next to the student

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Program</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casper, Rosa</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23502 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
<tr>
<td>Epstein, Samantha</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23504 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
<tr>
<td>Herbert, Jordan N</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23494 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
<tr>
<td>MacManus-Spencer, Laura</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23483 - not ranked)</td>
<td>Winter, 2018</td>
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<tr>
<td>Maung, Jessica N</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23499 - not ranked)</td>
<td>Winter, 2018</td>
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<tr>
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<td>Pending</td>
<td>Union Programs not through International Programs (ID 23500 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
<tr>
<td>Pagano, Alexandra E</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23487 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
<tr>
<td>Riley, Rachel A</td>
<td>Pending</td>
<td>Union Programs not through International Programs (ID 23499 - not ranked)</td>
<td>Winter, 2018</td>
</tr>
</tbody>
</table>
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 Accommodative Services
- 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
- Travel Information
- 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

**Application : Overview**

Use the tabs below to view and change information for this application.

- Caspeo, Rosa (Edit Profile)
- Union Programs not through International Programs
- Winter, 2018
- Status: Pending
- Program Enrollment: Applicant

<table>
<thead>
<tr>
<th>Tab</th>
<th>Status</th>
<th>Action</th>
<th>Comments</th>
<th>Status</th>
<th>Reviews</th>
<th>Profile</th>
<th>History Log</th>
<th>Email</th>
<th>Itinerary</th>
<th>Questionnaires</th>
<th>Materials</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessments</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Application Summary:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Advising</th>
<th>Pre-Decision</th>
<th>Received</th>
<th>Post-Decision</th>
<th>While Abroad</th>
<th>Returnee</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature Documents</td>
<td>0/0</td>
<td>0/0</td>
<td>0/0</td>
<td></td>
<td></td>
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<td>0/0</td>
</tr>
<tr>
<td>Material Submissions</td>
<td>0/0</td>
<td>0/0</td>
<td>0/0</td>
<td></td>
<td></td>
<td></td>
<td>0/0</td>
</tr>
<tr>
<td>Questionnaires</td>
<td>0/0</td>
<td>0/0</td>
<td>0/0</td>
<td></td>
<td></td>
<td></td>
<td>0/0</td>
</tr>
<tr>
<td>Assessments</td>
<td>0/0</td>
<td>0/0</td>
<td>0/0</td>
<td></td>
<td></td>
<td></td>
<td>0/0</td>
</tr>
<tr>
<td>Resources</td>
<td>0/0</td>
<td>0/0</td>
<td>0/0</td>
<td></td>
<td></td>
<td></td>
<td>0/0</td>
</tr>
<tr>
<td>Academic Advisor Approvals</td>
<td>0/0</td>
<td>0/1</td>
<td>0/0</td>
<td></td>
<td></td>
<td></td>
<td>0/1</td>
</tr>
</tbody>
</table>

- Found under **Materials** tab
- Found under **Questionnaires** tab

Created: 02/06/2018 (by Applicant)
Last Updated: 02/06/2018 @ 04:16:19 PM
Last Viewed by Applicant: 02/06/2018
ID: 22592
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.

- Click on the name of the query you created.
Run an Audit on a Group

- From the tab 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**.
- Leave the remainder blank.
- Scroll to the bottom of the 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>Sexual &amp; Other Forms of Unlawful Harassment Policy</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Conduct Code</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Alcohol &amp; Drug Policy</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Smart Traveler Enrollment Program (Optional)</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Student Health Information</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Participant Agreement</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Passport Information</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Travel Information</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact Information</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Self-Identification Form</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>GeoBlue Insurance</td>
<td>Pending</td>
<td></td>
</tr>
</tbody>
</table>

Check All | Uncheck All

- Casper, Rosa
- Epstein, Mallory
- Epstein, Samantha
- Fogarty, Samuel
- Guo, Lynn
- Herbert, Jordan
- Hickernell, Sarah
## What to do with Audit Results

1. Send an email to students who have forms outstanding (you can select the students)
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 page 16)
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

1. Select/Unselect the students whose status you want to change by clicking on the white triangle (refer to pages 8-9)

2. 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

- Go the **Applicant** drop-down menu and select **Search**

1. Select **Application Parameters**
2. Click **Next**
Reviewing Files that are Processed - Group

1. From **Program Types**, select **Program Enrollment**
2. From **Application Parameters**, 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 TD contact:
Varvara Meshkov or Ginny Casper
International Programs Office
Old Chapel, 3rd Floor
Phone: 518-388-6002
Email: meshkovv@union.edu
casperr@union.edu