# The Close Cycle Process
## *Frequently Asked Questions*

## Closing Applications

Applications are ready to close when their Final Status is *Application Incomplete, Admitted, Denied, Withdrawn, Pending Matriculation* or *Matriculated*.

There are three main steps:

1. Make sure all applications have a **final status**.
2. **Close your applications** individually or in batch mode.
3. **Archive people** (optional)

An easy way to think about it is that Applications are closed and People are archived.

### General Questions

- **Q: Is there a reason to close applications if the person records are not archived?**
  A: The Applications and Reviews tabs show all open applications. If applications from prior years are not closed, the number of applications in the grids can become overwhelming.

- **Q: What is the practical effect of marking an application as closed?**
  **A:** When you close an application, the person record is still active and available. You can view and compare the closed application with others on the Closed Applications tab.

- **Q: Is it recommended to close the cycle before our new application goes live? We typically did not archive in ACES until after the Oct 5 ABA date**.
  **A:** You can close whenever it makes sense for your school. It is fine to wait until Oct. 5 to close the prior year's records.

- **Q: How is closing an application different from closing a Flex App?**
  **A**: Closing an Application through the Close Cycle process affects application data that is in Unite and will be 'closed' for this year's cycle. Data from Closed Applications remains available for reports. Closing a Flex App means that no new applications can be submitted. The application is no longer available to Candidates**.**
  - *Note: You will continue to receive CAS updates for closed Flex Apps until the 'Generation End Date'.*

# Closing Applications (continued)

## Statuses

- **Q:  How do we differentiate people who are affirmatively denied vs. those we are marking as denied just to remove their applications from the current year?**
  **A:**  You could add a sub-status for 'Denied' such as 'Denied End-of-Year'.

-  **Q:  Is there another term for people who were denied that were just incomplete and never reviewed?**
  **A:**  You could use the 'Application Incomplete' status with a sub-status of 'Denied'.

- **Q:  Can records be changed from 'Pending Matric' to 'Matric' after they are archived?**
  **A**:  Yes, you will have access to work with the record and update information, including changes to the status and/or sub-status.

## Reports

- **Q:  When person records are closed or archived, will this affect reports?**
  **A:**  By default, Export reports retrieve person records with open and/or closed applications.  You can use a Condition to exclude closed applications.
  - **Tip**:  To run a report on a closed application:  use a condition with "application closed flag" and "year entering".  You can use a prior year condition and have it 'ask' which year to run.

## Step 2- Deleting Data from Person Records

This optional step is available after a person's applications(s) are closed.  You can choose to delete at any time in the cycle or beyond to comply with your school's data retention policies.  **Please remember that deleted information is permanently deleted.**

- **Q:  Can we delete a person's ethnicity from their record?**
  **A:**  Yes.  Ethnicity is one of the data elements you can select when doing a 'partial delete' of data from a person record. The other options are Person Notes, SSN, Special Interests, User Defined Fields (UDFs) and Documents.

- **Q:  Is data deletion required?**
  **A:**  No, it is up to each school to decide which, if any, data to delete.

- **Q:  Can Reviewer notes be deleted before closing the file?**
  **A:**  No, the application must be closed before any data can be deleted.

- **Q:  How much data can be deleted at a time?**
  **A:** Currently, 1,000 full records or 5,000 partial records can be deleted at a time.  There is no limit on the number of records that can be closed or archived at a time.

- **Q:  Is deleting partial information a way to save space?**
  **A:**  No, it's more about your school's retention policies.  Some schools do not want to keep information such as Reviewer Notes or Letters of Recommendation.

# Step 3 – Archiving Person Records

- **Q:  What is the advantage of archiving?**
  **A:**  Archiving helps you manage your current pool of prospects and applicants.  As the pool continues to grow, you will be able to focus your everyday searches and reports on people who are viable for the current year, while keeping other records available for future outreach or analysis.

- **Q:  When should we archive?  Does archiving interfere with the year-end status data?**
  A:  There is no specific time to archive; it is up to your school.  Archiving a person record will not affect data provided by LSAC.  We suggest archiving a person when you do not expect any further interaction with them.

- **Q:  Can a person record be 'unarchived'?**
  **A:**  Yes.  Person records are automatically restored when CAS data, a CRS query, or other type of inquiry data flows into Unite.

- **Q:  Can the archiving process be reversed?**
  **A:**  Yes.  Select the record(s) on the Person grid and choose the Action (Unarchive) at the bottom of the screen.  Additionally, person records are automatically reactivated if they are matched through a new CRS query, Application, or File Import.

- **Q:  Can records be changed from 'Pending Matric' to 'Matriculant' after they are archived?**
  **A:**  Yes.  You can edit archived records, including status changes.

- **Q:  Do you recommend leaving Deferred candidates in the Closed file status and not archiving them?**
  **A:**  Yes.  We recommend that you close the current application, but do not archive the person record.   If you do archive the person, then once you promote the deferral, they will become active (unarchived).

- **Q: It makes sense to archive students who matriculate.  Is it up to our discretion whether to archive other records or keep them available to contact in the next cycle?**
  **A**: Yes.  Unite gives you the flexibility to manage your records in the manner that works best for your school.

- **Q: How do we decide whether to archive CRS prospects vs. deleting them?**
  **A:** The basic guideline is that if you think you will continue to market to someone, you should not archive them.  If your school is no longer interested in this person and you just want information in the system for record keeping, then archive them.  If the person is brought back for any reason, the system will automatically 'unarchive' them.
  You can choose to manage your prospect records based on their statuses.  For example:
  - '**Leads**' extracted from CRS; no further contact (may want to delete).
  - '**Contacted**' by your school but did not respond (may want to archive)
  - '**Interested**' people who responded to your school but did not apply (may want to keep active)

- **Q: Are there any disadvantages to having a large number of archived records?**
  **A:** There is no technical/storage disadvantage to maintaining a large archive.  However, you might need to modify your conditions when running archival reports to include specific cycle dates.

## Marketing Emails

- **Q: Are archived records included in emails?**
  **A:** No. People whose records are archived will not receive emails through Unite.

- **Q:  If an archived record shows 'email unsubscribe' and the person's record is reactivated, are they eligible to receive marketing emails?**
  **A:** No.  When an archived record is re-activated, the 'unsubscribe' indicator remains in place.  You can change the setting manually or via the data grid.

- **Q:  If a person has an 'email unsubscribe' flag and their record is deleted, will they be eligible to receive marketing emails if they are subsequently added to Unite via CRS?**
  **A:**  Yes.  Unite will create a new record and the person will be eligible to receive Marketing emails.

- **Q:  How do you re-subscribe someone who was unsubscribed?**
  **A:** There are two ways:
  - On the Person record, uncheck the 'unsubscribe box' In the Contact Information section.
  - In Journeys / Contacts, access the Contact Record, go to the Details tab and change the '*Do not allow Bulk emails – Global'* option.

## General Questions

- **Q: Is there a recommended time during this process to assemble documents?**
  **A:** Document Assembly is available for archived as well as current people in Unite, so you can coordinate the timing with your school's process.

- **Q: Is it possible to identify people who matriculate at another law school?**
  **A:** No. Applicants can be identified as prior matriculants, but currently we cannot identify applicants who matriculate at another school in the current year.