LSAC® Unite™

LSAC Unite
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Closing Applications and Archiving People at the End of a Cycle

In Unite, there is one record for each person. It contains all information about the person while in all Unite stages: Prospect, Applicant, and Matriculant. A person record contains all applications a person submits; they are labeled with the year, term, and application type. Applications are either OPEN or CLOSED. OPEN applications are the ones you're working with during the current cycle; they are available on workflow grids and included in search results. CLOSED applications are in a person record but are not being considered for the current admission cycle. People with closed applications may be included in person search results, but their applications are listed only in the Closed Year grid in the APPLICATIONS area. If you enter application search criteria in a person search, it will search for both open and closed applications.

In Unite, at the end of an admission cycle, it is typical to close applications and possibly archive applicant person records. There are three steps to this process: making sure applications are in a closing status, closing the applications, and archiving the people. An optional step is to delete data from application records after they are closed.

In addition to this job aid, you can find related resources about closing and archiving in the FAQ section of the Unite Support Site.

Step 1: Closing Applications

Applications are ready to close when their Status is Application Incomplete, Admitted, Denied, Withdrawn, Pending Matriculation, or Matriculated. If an application is not in one of these statuses, Unite will not allow them to be closed. Once an application is in a closing status, it is possible to close one person's application from within their person record. Closing multiple applications at once can only be done in the APPLICATIONS area.

Note that closing an application in Unite is different from closing a FlexApp. Closing an application through the Close Cycle process affects application data that is in Unite and will be 'closed' for this year's cycle. Closing a Flex App means that no new applications can be submitted, and the application is no longer available to candidates.

Closing One Person's Application

1. From the PEOPLE area, select the Search Criteria tab.

2. Search for the person whose application you want to close, using either the person or application search fields.

3. Once the person is found, select their name to open the person record.

4. In the Application area of the person record, locate the application you want to close.

5. Before the Application Summary fields, locate the Close button and select it. Note that the application must be in one of these statuses to be closed: Application Incomplete, Admitted, Denied, Withdrawn, Pending Matriculation, or Matriculated. If not, Unite will not allow the application to be closed. In this case, edit the person's application status as appropriate to allow for closing.

6. When asked to confirm, select Yes.

7. If the application is the last one on the person record and there are no other open applications, Unite asks if you would like to archive the person. You may select Yes if you like. You may select No if you plan to archive people in bulk.

8. If you select No, then the person record is still active, and the label "Closed" is added to the application tab.

9. Once an application is closed the person (who had been in the Applicant Stage) reverts to the Prospect Stage. The Person Status becomes Previous Applicant, and the Person Substatus reflects the status of application when it was closed (Previous Admit, Previous Deny, etc.).

10. For applicants with an application status of Matriculated or Pending Matriculation (who are, as a result, in the Matriculant Stage), closing their application does not change their stage: they remain in the Matriculant Stage. Their Person Status becomes Matriculated.

Closing Applications in Bulk

1. From the APPLICATIONS area, select the All Applications tab.

2. Filter, sort, and organize the grid to isolate the applications you want to close.

3. Select the check boxes next to the names of all the applicants whose applications you want to close.

4. At the top of the grid, select .

5. Select Close from the Actions menu. Note that the application must be in one of these statuses to be closed: Application Incomplete, Admitted, Denied, Withdrawn, Pending Matriculation, or Matriculated. If not, Unite will not allow the application to be closed. In this case, you may want to perform a batch edit to update application statuses as appropriate.

6. When asked to confirm, select Yes.

7. The applicants' names will no longer appear in the grid. Closed applications are automatically moved to the Closed Year tab in the APPLICATIONS area.

Optional Step: Deleting Data from Application/Person Records

Once applications are closed, an optional step is to delete application or person level data. You can choose to delete at any time in the cycle or beyond to comply with your school's data retention policies. IMPORTANT: Note that deleted information is permanently deleted.

Deletion is available in the PEOPLE area or the APPLICATIONS area. When deleting from the APPLICATION area, you can only delete partial application information. When deleting from the PEOPLE area, you have the option to delete the full record or selected data in the record.

Deleting Application Information

1. From the APPLICATIONS area, select the Closed Year tab.
2. Filter, sort, and organized the grid to isolate the applicants for whom you want to delete partial application information.
3. Select the check boxes next to the names of applicants for whom you want to delete partial application information.
4. At the top of the grid, select $\boxed{\text{A}_\text{ℓ} \text{ Actions}}$.
5. Select Delete from the Actions menu.
6. Unite will prompt you to Select Data Elements to Delete. The maximum number of records from which to partially delete information is 5,000.

7. Select Continue.

8. Choose which sections you want to delete. It is possible to delete the following information: Financial Aid, Notes, Recommendations, Scholarships, Documents (CAS, Eapp, School Documents), Review Data, and any User Defined fields (UDFs) your school uses in the application or reviews sections of Unite.

9. Select Add.

10. Once you have selected the fields you want to delete, it is possible to save that set of fields, so you do not have to select them every time you want to do a partial delete of application information. Type a name to describe the set of fields in the Saved Selections drop down. The next time you perform a delete, you will be able to choose that name.

11. Select Continue.

12. Verify your choices on the confirmation screen, and if the information is correct, select Submit. If not accurate, select Cancel and then Yes to confirm Cancel. You may then start over selecting items to delete.

Deleting Person Record Information

1. From the PEOPLE area, select the Search Criteria tab.

2. Search for the people for whom you want to delete either partial information or the full person record information.

3. Select the check boxes next to the names of people for whom you want to delete partial information.

4. At the top of the grid, select A_z Actions .

5. Select Delete from the Actions menu.

6. Unite will prompt you to choose to delete all or partial records. The maximum number of records from which to partially delete information is 5,000; the maximum for full record deletion is 1,000.

7. If you choose to select partial records, you must then choose which data elements to delete. You may delete: Ethnicity, SSN, Notes, Special Interests, Documents, and any User Defined Fields your school uses in the person record. If you choose to delete the full records, proceed to step 12.

8. Once you have selected the fields you want to delete, it is possible to save that set of fields, so you do not have to select them every time you want to do a partial delete of application information. Type a name to describe the set of fields in the Saved Selections drop down. The next time you perform a delete, you will be able to choose that name.

9. Select Add.

10. Select Continue.

11. Verify your choices on the confirmation screen, and if the information is correct, select Submit. If not accurate, select Cancel and then Yes to confirm Cancel. You may then start over selecting items to delete.

12. To delete the full record, select the radio button for Delete Full Record. The maximum number of full records you can delete is 10,000.

13. To delete the full record for an applicant, all applications on their record must be closed.

14. Select Continue.

15. Review the information in the confirmation screen.
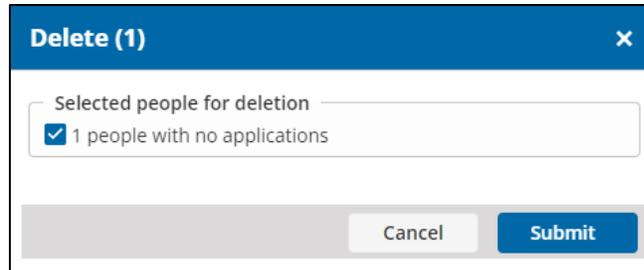
16. Select Submit.

17. IMPORTANT: If you choose to delete full records, note that this deletion is permanent.

Step 2: Archiving People

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. Archiving can be done at any time of year; LSAC's recommendation is to archive people when you do not expect any further interaction with them. Once you archive a person record, you may manually un-archive them (that is, make that person record active again). Person records are automatically un-archived when CAS data, a CRS query, or other type of inquiry data flows into Unite. Note that archiving can only be done from the PEOPLE area of Unite.

1. In the PEOPLE area, search for the records you want to archive.

2. If seeking to archive applicants whose applications you have closed, use the Person Search fields to find people in the Prospect Stage, with a person status of Previous Applicant, or people in the Matriculant Stage.

3. Note that if a person has an open application, their record cannot be archived.

You must close their application first.

4. Select the check boxes next to the names of people you want to archive.

5. At the top of the grid, select ⓐ Actions .

6. Select Archive from the Actions menu.

7. When asked to confirm, select Yes.

8. Once the people are archived, they will no longer appear in the grid of search results. This is because archived records are not included in search by default.

9. To find any people whom you have archived, select the Include Archives check box in the person search fields on the Search Criteria tab.

10. People who have been archived have an archived icon 🗄 next to their name that displays as archived when hovering or reads as archived when using screen readers.