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# Admissions

## Banner 8.2

### SAAQUIK – Quick Admit

### Create General Person/Student

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# ADMISSIONS

# Create General Student/Quick Admit (SAAQUIK)

The intent of **Quick Entry** is to provide a way to enter and register persons on the system with minimal effort.  It can also create recruiting and admissions records at the user's option and will automatically create a general student record, which is required for registration.

The **Quick Admit** form's use varies by campus but is often used to create records in Banner for students who are not interested in pursuing a degree, but simply want to register for summer session, continuing education courses, off-campus credit courses, noncredit courses, workshops, seminars, conferences, etc.

**Quick Entry** can also be used to create records for students pursuing a degree.

## *What's New in Banner 8.2*

- There are no major process changes in SAAQUIK and functionality is the same as Banner 7.3.
- The Admissions Type workaround has been fixed in Banner 8.2. You no longer have to manually add Admissions Type as it now populates when loading the default values.

## *GOAMTCH Process*

- The GOAMTCH form is now used when creating a new person record. The matching process initiated by GOAMTCH checks for existing person records in Banner and helps prevent the creation of duplicate or incorrectly merged records.
- When clicking the Create ID button in the key block of SAAQUIK, the GOAMTCH form will open and all person information is entered there.
- After clicking the Duplicate Check button on GOAMTCH, the matching process will return one of the following scenarios:
    - **No Match Found** – Create a new person record
    - **Match Found** – Merge with that person record
    - **Potential Match Found** – No exact match. Displays a list of potential person records. Review the list and match if existing person found or create a new person record.
- After making your person match decision you are returned to SAAQUIK where you can complete the admission process.
- See the **Common Matching Banner 7.3** training guide for details on the use of GOAMTCH.

## *ID, Name, and Term Search*

It is extremely important to perform a person search to determine if the applicant already exists in Banner.  Conducting a thorough person search will help prevent creating duplicate person records or incorrectly merging your applicant record with an existing person record.

**GOAMTCH** does not replace existing search methods. Be sure to utilize the **ID and Name Extended Search** window, **SOAIDEN**, **GUIALTI**, **SAAADMS**, **SOAPCOL**, etc. before creating a new person record.

**Note:** To close the ID and Name Extended Search window, click the X button in the upper right-hand corner of the window.

## *Generate ID*

If you are unable to find a match to an existing person record in Banner a new person record will need to be created.

1.  To create a person record, click the Generate ID icon.



(Figure 1 – SAAQUIK Form)

2. The GOAMTCH form will open. Enter the name and the **mailing** address street and zip code and tab off the zip code field. The address will be validated and reformatted. If an error message is received, verify address and correct.



(Figure 2 – Enter person info on GOAMTCH)

3. Enter remaining information SSN (if available), birth date (day/month/year seq.), gender, **mailing** phone number, and **personal** email address. Click the Duplicate Check button to initiate the match process.

4. Scenario 1 - If a match is not found you will be prompted to create a new person record. Click the Yes button to create the record or No to return to the Data Entry section.
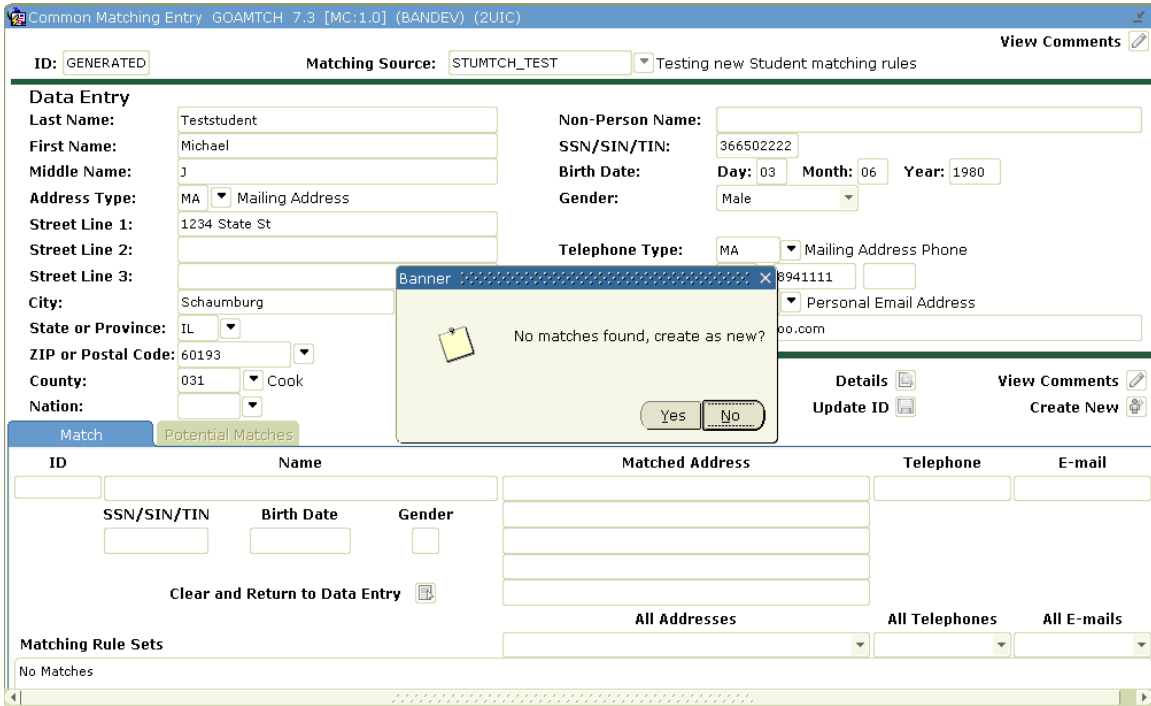


(Figure 3 – Scenario 1 – Create a new person)

5. New ID Created window pops up listing type of records created. You are returned to SAAQUIK.
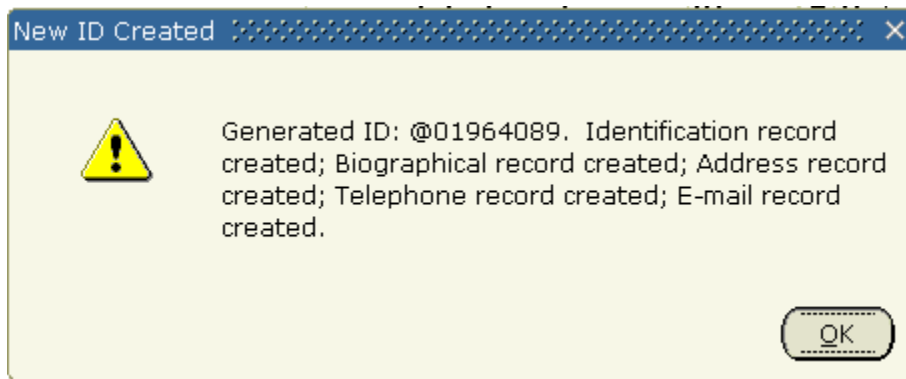


(Figure 4 –New ID / Update informational window)

6. Scenario 2 – If an exact match is found the following will display.

(Figure 5 – Scenario 2 – Exact match found)

7. Clicking the **Select ID button** matches to the record displayed on the Match tab. Address, phone or missing data will not be updated.
8. Clicking the **Update ID button** will create a new address/phone and Email address record if different from existing record. Birth date or SSN will not be updated, but will be added if not currently in Banner.
9. Scenario 3 – if there is no exact match, but there is a partial match against existing Banner records, a listing of Potential Match records will display.

(Figure 6– Scenario 3 – Potential match found)

10. In this example the applicant did not supply their SSN and the Birth Date – Day doesn't match (possible typo on the app or in Banner). The address, phone and email match. If you are confident this is the same person as the one highlighted in the potential matches listing then click Select ID and contact the OAR so about the Birth Date discrepancy. If you cannot find a match in the list of potential matches then create a new person record.

11. After matching to an existing record or creating a new person record you are returned to SAAQUIK.

## The Quick Admit Tab

## Enter the ID

Enter the applicants UIN in the ID field or perform a person search and generate an ID if necessary.

## Select the Term

The Term Code can be entered directly into the Term Code field or can be selected from the list by clicking on the drop down arrow (similar to Figure 3).

## Select the Level

1. The Level code can be entered directly in the Level field or can be selected from a list. Go to the drop down arrow in the Level field.
2. Select the appropriate Level Code from the Level Code Validation (STLEVL) pop-up dialogue box.
3. Click the OK command button.
4. Select the Next Block icon to navigate to the Quick Admit Tab.



(Figure 7 – Level Code Validation)

5. Click the OK button on the Default values information window
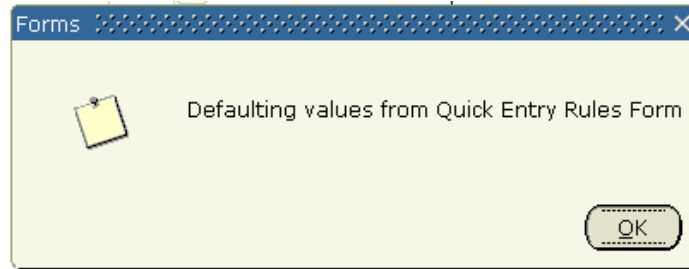


(Figure 8 – Default value information window)

6. Default values for the Term and Level should populate the Application and Recruit Information and Curriculum/Field of Study sections of the form. (See Figure 6A).

**Note**: Leave the Create Application Record field checked to create an application record on the Admissions Application (SAAADMS) form when the record is saved. (This is a default setting)



(Figure 9 – Quick Admit tab)

7. If default values are not supplied, click in the Application and Recruit information box and complete the required information using the drop down arrows.
   - Check the Create Application Record field
   - Admission Type = ND
   - Application Status = D

- Admission Decision = 00

8. Click the **Next Block** icon to navigate to the Curriculum block. **NOTE – Do not save** the record yet.
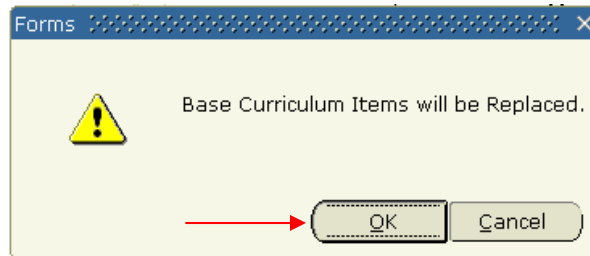
## *Select the Curriculum*

9. In the Curriculum Block, click the drop down arrow button in the Program field to update the curriculum information. (See Figure 6A)

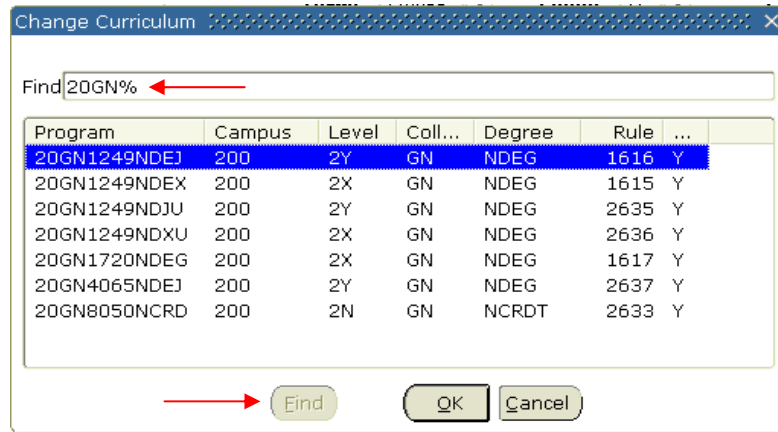10. Select Change Curriculum on the Option List window
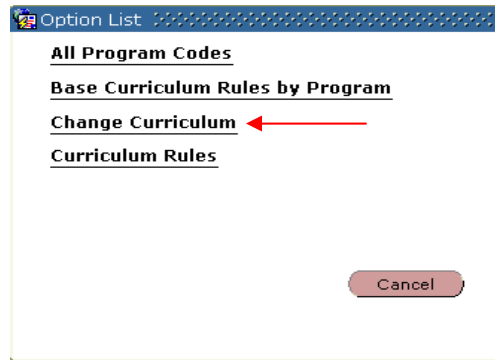


(Figure 10 – Option List)

11. Click OK on the Base Curriculum Items window



(Figure 11 – Base Curriculum Items)

12. In the Change Curriculum window, find the appropriate program. You can use wild cards – 20GN% and click the Find button.
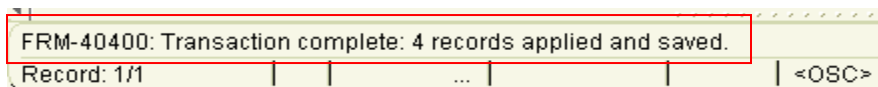


(Figure 12 – Change Curriculum program list)

13. Select the desired Program and click the OK button. (see Figure 12)
14. The new program information will display in the Curriculum and Field of Study blocks.
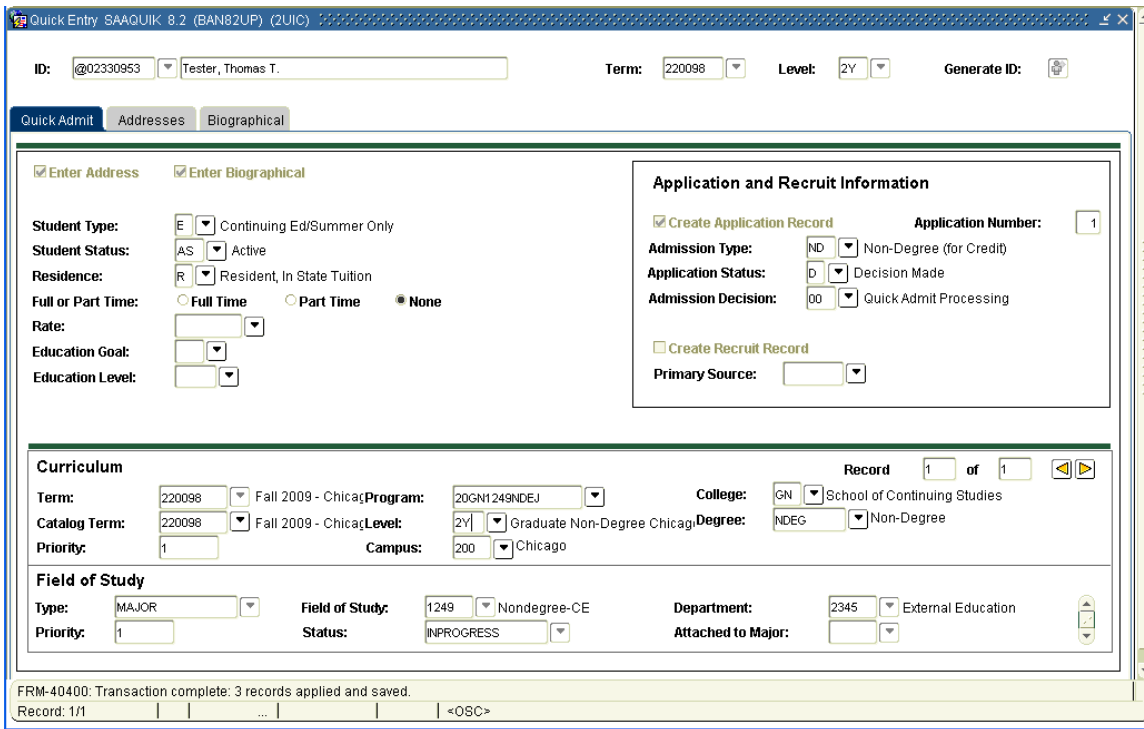


(Figure 13 - Updated Curriculum block)

15. Click the **Save** icon to save the record. Transaction information will display at the bottom of the form.



(Figure 14 – Updated Curriculum and Biographical info)

16. Click the **Previous Block** icon to navigate to the applicant information section to add address information.
17. To enter Address information - Select the Addresses Tab.



(Figure 15 – Select Addresses Tab)

## *The Addresses and Biographical Tabs*

1. **Add an address**
2. To add a different address type and phone record, click the **Insert Record** toolbar button and add the appropriate information. Use the drop down arrows for a list of codes if needed:
   - Address Type
   - Street
   - Zip or Postal Code (by doing this, City, State, and County will default)
   - Nation
   - Telephone Type (will default to Address Type code)
   - Telephone

3. **Update an address**
4. Terminate the old address record – enter **To Date** and save **before** inserting new address record
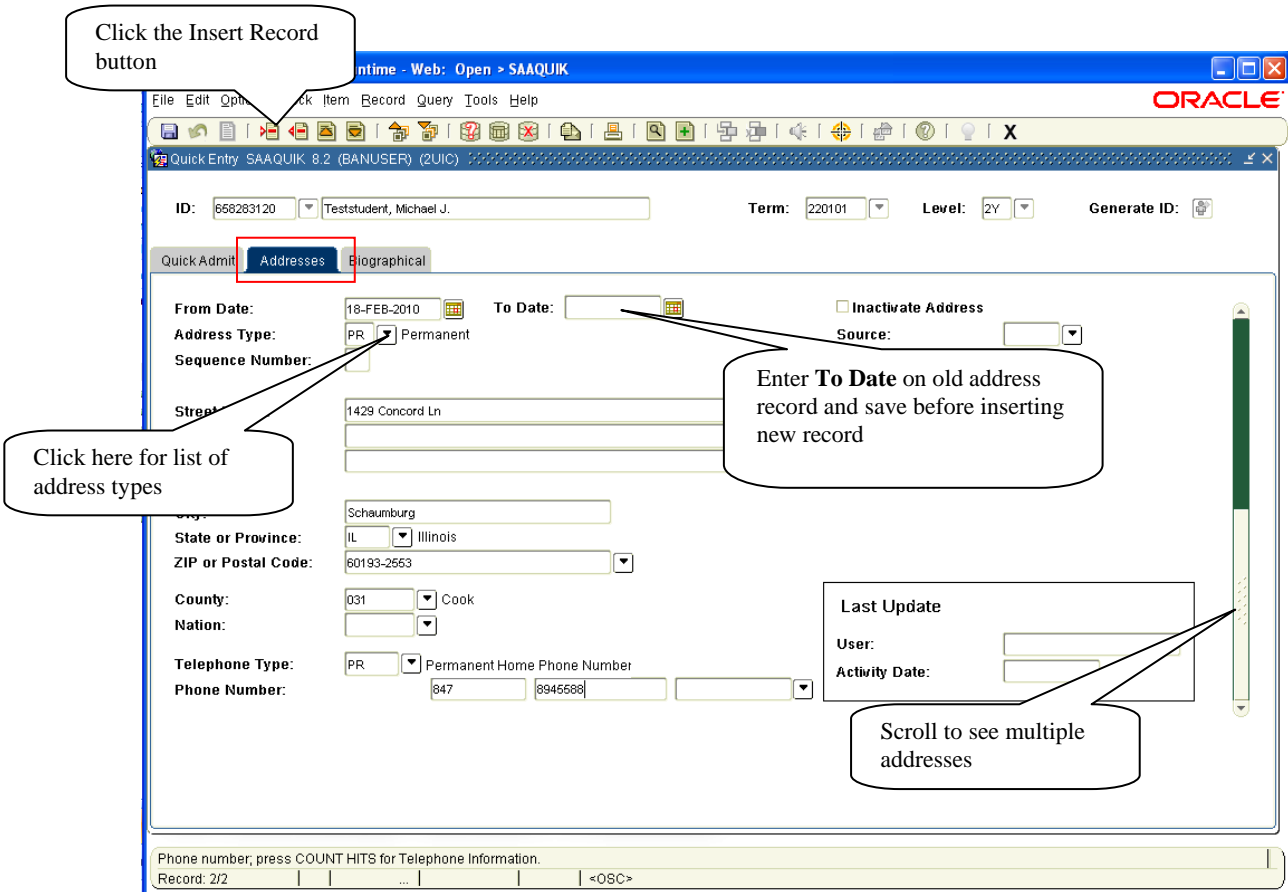
(Figure 16 – Addresses Tab)

**Note:** The Last Update box will track the User and the Activity Date.

5. Click the Save Icon to save the record
6. Add any biographical information not entered in GOAMTCH on the Biographical tab and save the changes.
7. Return to the Quick Admit Tab and review the record. Note that the Enter Address and Enter Biographical check boxes are now checked.
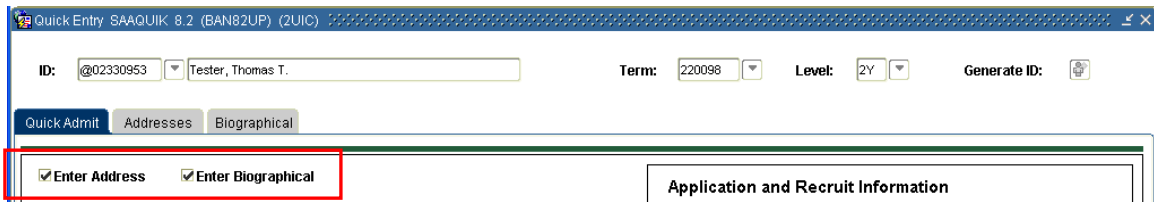


(Figure 17 – Quick Admit Tab)

The **SAAQUIK** Form is updated. Select the X icon in the toolbar to exit the form.