



*University of Illinois*

# **Admissions**

**Create General Student  
Quick Admit**

**Non-Degree Campus Certificates**

**Banner 8.2**

**(Includes GOAMTCH)**

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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**, **GUALTI**, **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.

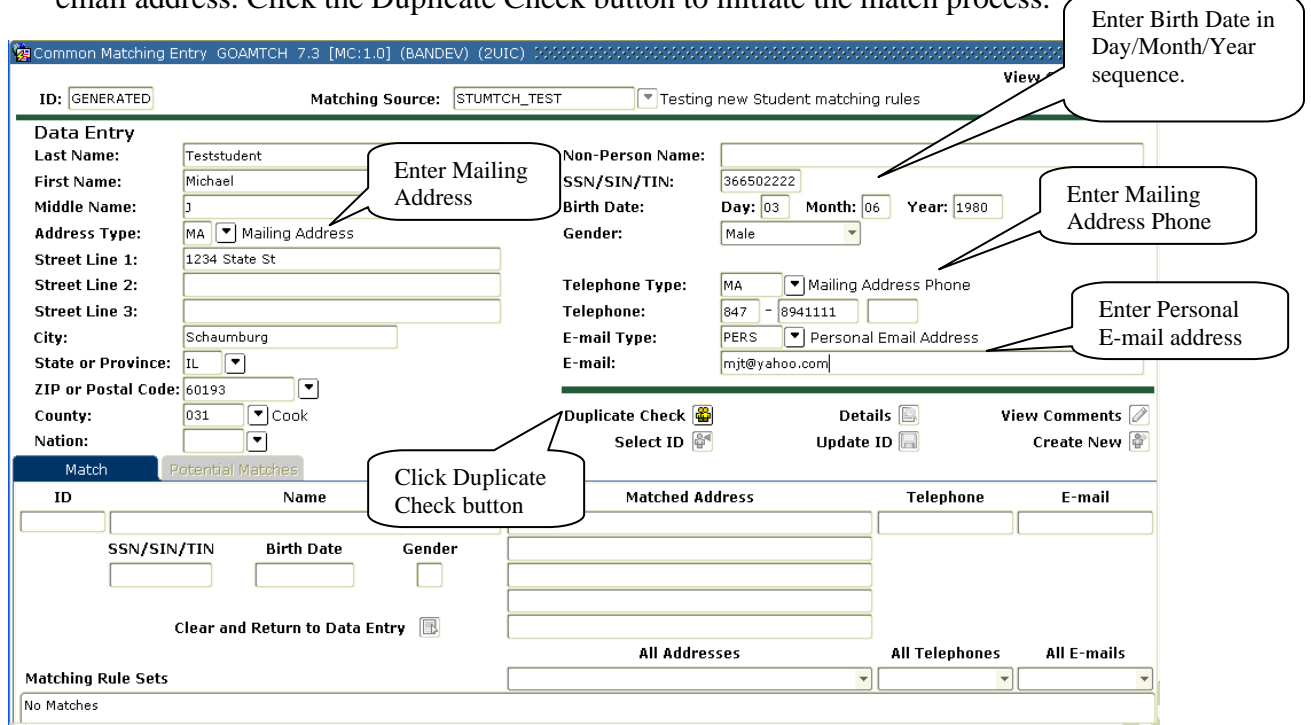
The screenshot shows the SAAQUIK 8.2 (BAN82UP) (2UIC) Quick Entry form. The 'Generate ID' button is circled in red and pointed to by a red arrow. The form includes the following sections:

- Student Information:** Student Type, Student Status, Residence, Full or Part Time (Full Time, Part Time, None), Rate, Education Goal, Education Level.
- Application and Recruit Information:** Create Application Record, Application Number, Admission Type, Application Status, Admission Decision, Create Recruit Record, Primary Source.
- Curriculum:** Term, Catalog Term, Priority, Program, Level, Campus, College, Degree, Record of.
- Field of Study:** Type, Priority, Field of Study, Status, Department, Attached to Major.

At the bottom of the form, there is a text box for the name: "Name; Enter a name Last, First, Middle and press enter or tab. Use the wildcard \"%\" if needed." and a record indicator: "Record: 1/1 | ... | <OSC>".

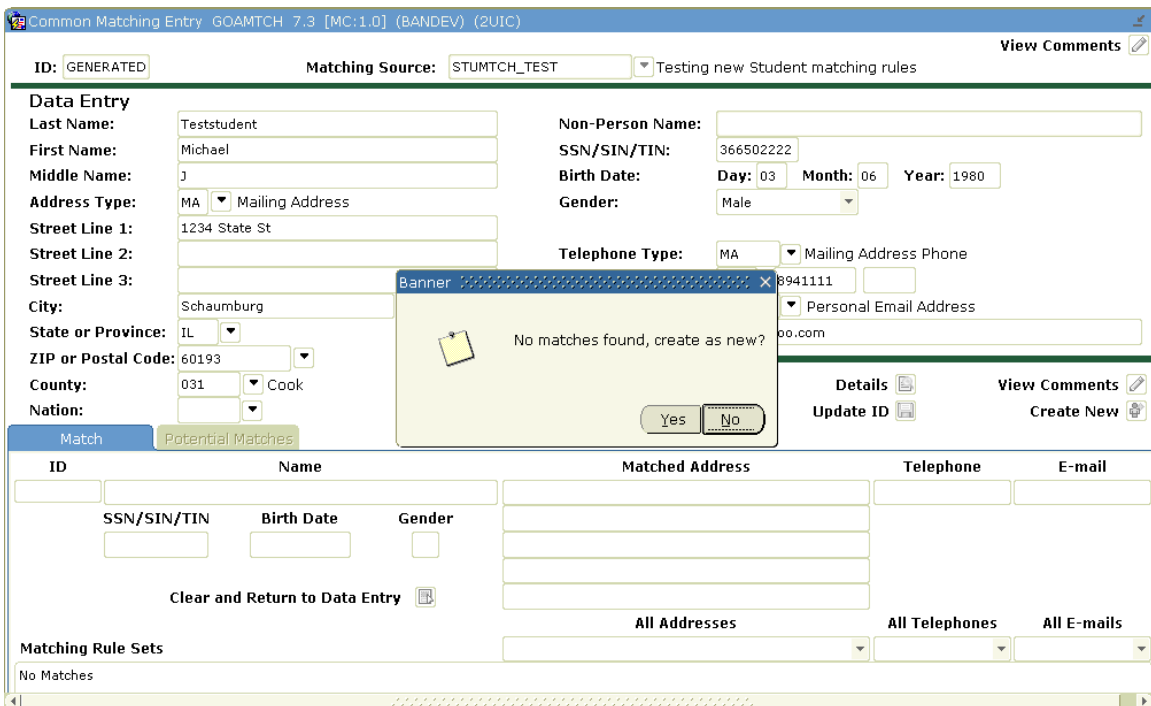
(Figure 1 – SAAQUIK Form)

- The GOAMTCH form will open. Enter the **mailing** address, 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.



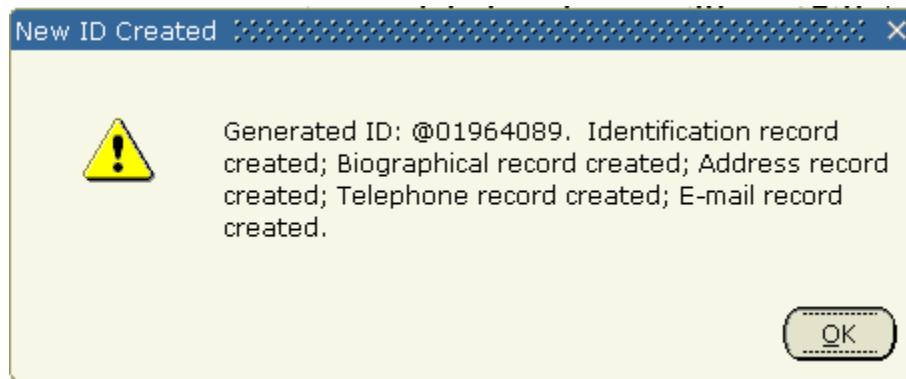
(Figure 2 – Enter person info on GOAMTCH)

- 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)

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



(Figure 4 –New ID / Update informational window)

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

(Figure 5 – Scenario 2 – Exact match found)

6. Clicking the **Select ID button** matches to the record displayed on the Match tab. Address, phone or missing data will not be updated.
7. 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.
8. 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.

The screenshot shows the 'Common Matching Entry' application window. At the top, the window title is 'Common Matching Entry GOAMTCH 7.3 [MC:1.0] (BANDEV) (2UIC)'. Below the title bar, there are fields for 'ID: GENERATED', 'Matching Source: STUMTCH\_TEST', and a checkbox for 'Testing new Student matching rules'. A 'View Comments' link is also present.

The 'Data Entry' section contains several input fields:
 

- Last Name: Smith
- First Name: Michael
- Middle Name: (empty)
- Address Type: MA (Mailing Address)
- Street Line 1: 4455 Western Ave
- Street Line 2: (empty)
- Street Line 3: (empty)
- City: Chicago
- State or Province: IL (Illinois)
- ZIP or Postal Code: 60607
- County: 031 (Cook)
- Nation: (empty)
- Non-Person Name: (empty)
- SSN/SIN/TIN: (empty)
- Birth Date: Day: 08, Month: 05, Year: 1987
- Gender: Male
- Telephone Type: MA (Mailing Address Phone)
- Telephone: 773 - 1234567
- E-mail Type: PERS (Personal Email Address)
- E-mail: msmith@aol.com

Below the data entry form is a table of 'Potential Matches (155)'. The table has columns for ID, Name, SSN/SIN/TIN, Birth Date, Gender, Matched or Hierarchical Address, Telephone, and E-mail. One row is highlighted in yellow, indicating a match. Below the table are buttons for 'Clear and Return to Data Entry', 'All Addresses', 'All Telephones', and 'All E-mails'. At the bottom, there is a 'Matching Rule Sets' section with two rules listed.

Callouts in the image:
 

- A callout points to the 'Match' tab, stating: 'Match tab is highlighted. Scroll down to review records. Review the match results in the Match Rule Sets box.'
- A callout points to a button, stating: 'Click button to sort by name.'
- A callout points to the 'Matching Rule Sets' box, stating: 'Scroll to see all records. Review the match results in the Match Rule Sets box for each potential match.'

(Figure 6– Scenario 3 – Potential match found)

9. 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.
10. 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.

Quick Entry SAAQUIK 8.2 (BAN82UP) (2UIC)

ID: @02330953 Tester, Thomas T. Term: 220098 Level: ▼ Generate ID:

Quick Admit Addresses Biographical

Enter Address  Enter Biographical

Student Type:  Student Status:  Residence:  Full or Part Time:  Full Time  Part Time  None Rate:  Education Goal:  Education Level:

Curriculum

Term:  Program:  College:  Record  of

Catalog Term:  Level:  Degree:

Priority:  Campus:

Field of Study

Type:  Field of Study:  Department:  Priority:  Status:  Attached to Major:

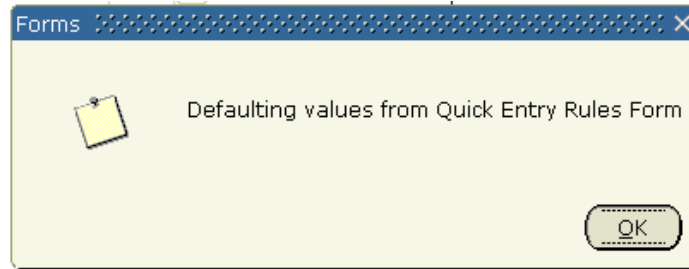
Choices in list: 21  
Record: 1/1 | ... | List of Valu... | <OSC>

Code	Description	CEU	VR Msg	Sys Re
2P	Professional - Chicago	N		
2Q	CEU Non Credit - Chicago	Y		
2U	Undergrad - Chicago	N		
2X	Undergrad Non-Degree Chicago	N		
2Y	Graduate Non-Degree Chicago	N		
4C	Conversion	N		
4D	Doctoral - Springfield	N		
4M	Graduate - Springfield	N		

(Figure 7 – Level Code Validation)



- Click the OK button on the Default values information window



(Figure 8 – Default value information window)

- 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)

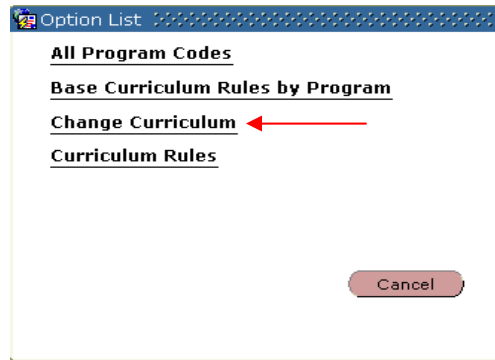
(Figure 9 – Quick Admit tab)

- 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.

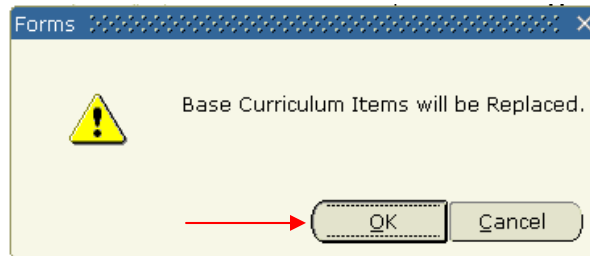
## Select the Curriculum

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



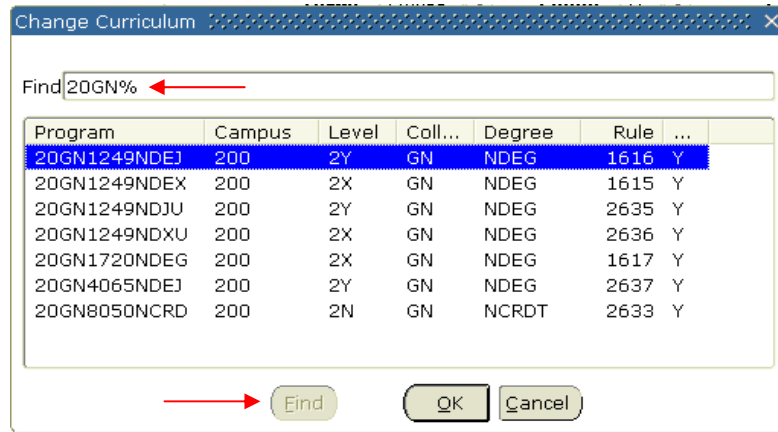
(Figure 10 – Option List)

11. Click OK on the Base Curriculum Items window



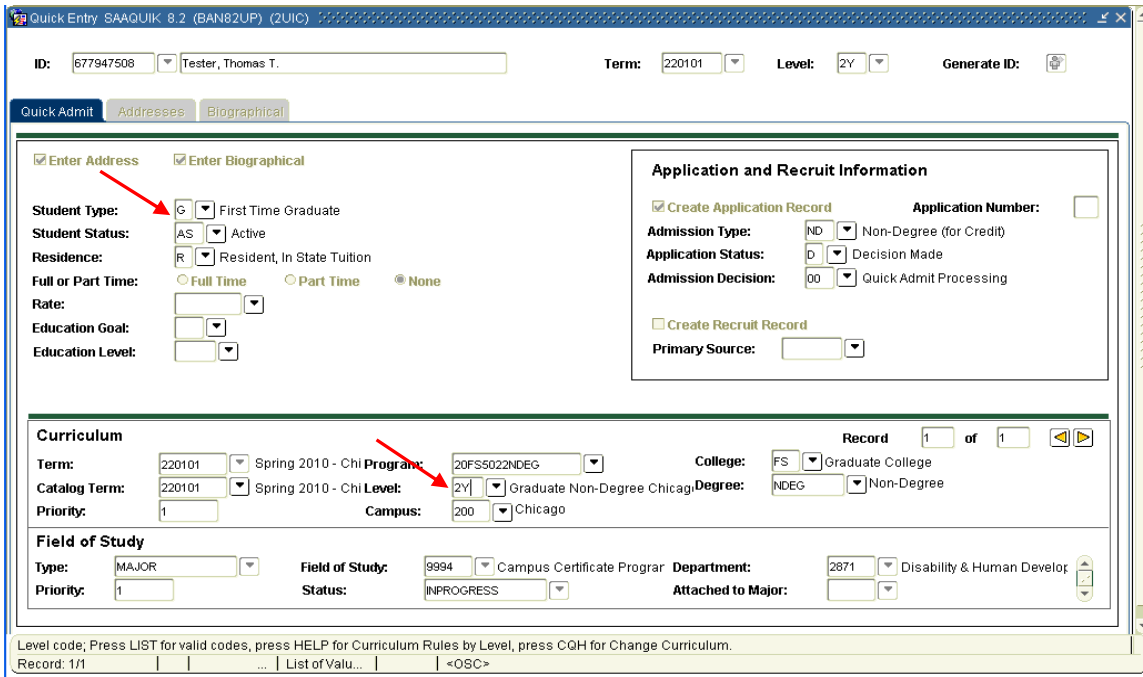
(Figure 11 – Base Curriculum Items)

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



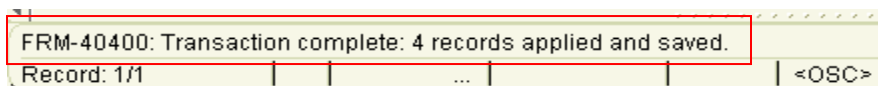
(Figure 12 – Change Curriculum program list)

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



(Figure 13 - Updated Curriculum block)

- 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.

Quick Entry SAAQUIK 8.2 (BAN82UP) (2UIC)

ID: 677947508 Tester, Thomas T. Term: 220101 Level: 2Y Generate ID:

Quick Admit **Addresses** Biographical

Enter Address  Enter Biographical

Student Type:  First Time Graduate  
 Student Status:  Active  
 Residence:  Resident, In State Tuition  
 Full or Part Time:  Full Time  Part Time  None  
 Rate:   
 Education Goal:   
 Education Level:

**Application and Recruit Information**

Create Application Record Application Number:   
 Admission Type:  Non-Degree (for Credit)  
 Application Status:  Decision Made  
 Admission Decision:  Quick Admit Processing  
 Create Recruit Record  
 Primary Source:

**Curriculum**

Term:  Spring 2010 - Chi Program:   
 Catalog Term:  Spring 2010 - Chi Level:  Graduate Non-Degree Chicag Degree:  Non-Degree  
 Priority:  Campus:  Chicago  
 Record  of

**Field of Study**

Type:  Field of Study:  Campus Certificate Program Department:  Disability & Human Develop  
 Priority:  Status:  Attached to Major:

FRM-40400: Transaction complete: 3 records applied and saved.  
 Record: 1/1

(Figure 15 – Select Addresses Tab)

## The Addresses and Biographical Tabs

- On the Addresses Tab, enter a permanent or other address and phone record when appropriate. Use the drop down arrows for a list of codes if needed:
  - Address Type
  - Zip or Postal Code (by doing this, City, State, and County will default)
  - Street
  - Nation
  - Telephone Type (will default to Address Type code)
  - Telephone

Quick Entry SAAQUIK 8.2 (BAN82UP) (2UIC)

ID: @02330953 Tester, Thomas T. Term: 220098 Level: 2Y Generate ID: [Icon]

Quick Admit **Addresses** Biographical

From Date: 07-OCT-2009 To Date: [Calendar Icon]

Address Type: MA Mailing Address

Sequence Number: 1

Street Line 1: 900 E Frederick St

Street Line 2: [Text Box]

Street Line 3: [Text Box]

City: Arlington Heights

State or Province: IL Illinois

ZIP or Postal Code: 60004-5738

County: 031 Cook

Nation: [Text Box]

Telephone Type: MA Mailing Address Phone

Phone Number: 847 2954612

Inactivate Address

Source: [Text Box]

Override Address Verification

Delivery Point: [Text Box]

Correction Digit: [Text Box]

Carrier Route: [Text Box]

**Last Update**

User: MMMLSO

Activity Date: 07-OCT-2009

Address start date, format (DD-MON-YYYY), blank is always effective.

Record: 1/1 <OBC>

(Figure 16 – Addresses Tab)

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

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

Quick Entry SAAQUIK 8.2 (BAN82UP) (2UIC)

ID: @02330953 Tester, Thomas T. Term: 220098 Level: 2Y Generate ID: [Icon]

Quick Admit **Addresses** Biographical

Enter Address  Enter Biographical

Application and Recruit Information

(Figure 17 – Quick Admit Tab)

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