



LIAISON

CAS

experience

JULY 24-25 2023

CHICAGO, IL

# What's New with the CAS Applicant Experience?

July 24, 2023



A woman with dark hair, wearing a green and grey striped cardigan over a light blue shirt and clear safety goggles, is focused on a task in a laboratory. She is using a metal stand to hold a glass flask. In the foreground, there are several other glass flasks containing liquids of different colors (green, orange, red). To her left, the side profile of another person wearing safety goggles is visible. The background shows a bright, modern laboratory setting with large windows.

# Agenda

1. Application Tour
2. Understanding Release Notes
3. New CAS Releases  
(January 2022 – July 2023)
4. Shared Lookup Table Updates
5. Q&A

# Meet Our Presenter



Katie Wedgewood  
Knowledge Strategist  
Liaison

Let's take a tour!

**CASPA™** Sarah Welch TEST CAS ID: 2535458007 Sign Out

My Application Add Program Submit Application Check Status

## My Application

This dashboard is your application home providing access to each part of the application you need to complete and a high level overview of your progress.

**Latest Notifications**

- 🕒 Your CASPA login has been updated 04/17/2023
- 📧 Welcome back to the CASPA application! (save this email!) 04/17/2023

[View My Notifications](#)

Section	Progress
Personal Information	0/8 Sections Completed
Academic History	3/4 Sections Completed
Supporting Information	0/6 Sections Completed
Program Materials	0/3 Sections Completed

# Have questions about the application?

Contact a member of your account team!

- Client Success Manager (CSM)
- Client Success Director (CSD) / Account Director (AD)

Applicants have a dedicated customer service support team:

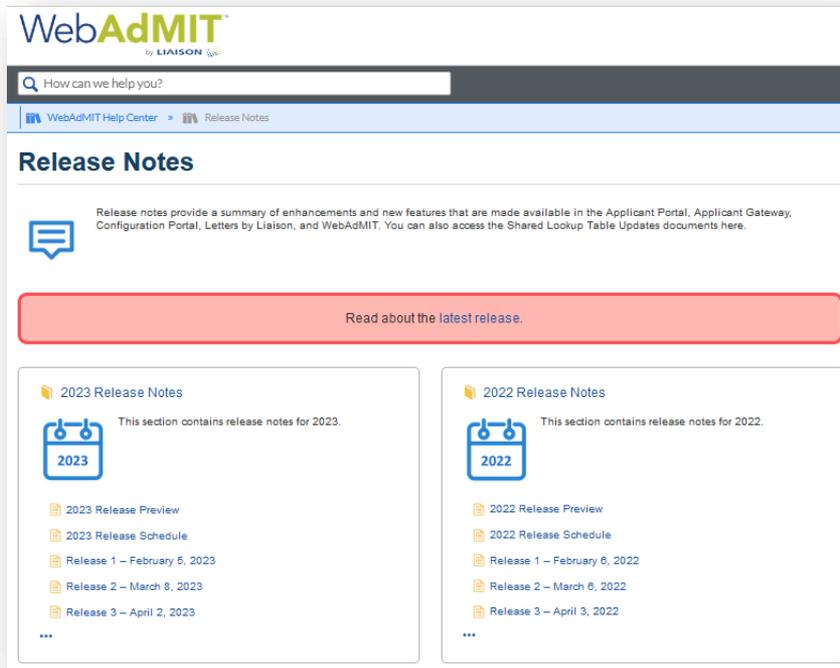
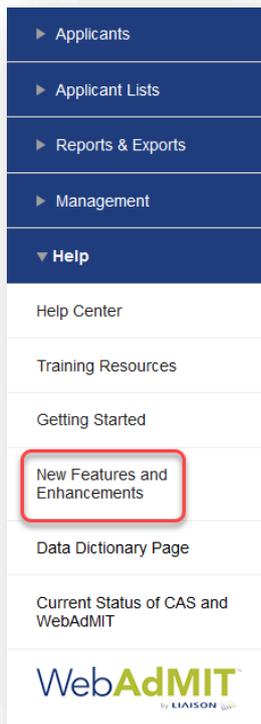
- Live chat
- Email
- Phone
- Applicant Help Center



# What are release notes?

- Monthly process
- Summary of new features and enhancements
  - Current software trends and current events
  - Your feedback
- Can include screenshots, step-by-step instructions, best practices
- Highlights the benefit for you
- New documentation (e.g., reference guides, etc.)
- Scheduled maintenance
- Upcoming events, webinars, etc.

# How do I find my release notes?



## Release 6 – July 9, 2023

### New Features and Enhancements

#### WebAdMIT Enhancements

Disclaimer: on rare occasions, a new feature or enhancement may be moved to a future release or otherwise subject to change.

- Table of contents
- New Features and Enhancements
- WebAdMIT Enhancements
  - Vertical Column Borders Throughout Entire Table
  - Updated CAS and Cycle Drop-down Sort Order
  - Ongoing Maintenance
  - Upcoming Events

#### Vertical Column Borders Throughout Entire Table

This enhancement is automatically available for use by all CASs and participating programs. No action is required on the part of any association, school, or program. Contact a member of your account team for more information.

The data within many of WebAdMIT's panels are displayed in tables. With this enhancement, the vertical column borders display throughout the entire table. Previously, vertical column borders only appeared in table headers. This enhancement reuses some of the display formatting from the old user interface.

Previous table layout without vertical column borders

Name & DemCAS ID	Email	Designation	Appl. Status	Local Status	Decision
Demo, Tanya 20080278	appteam100043@que.org	Master's Program	Verified	Ready to Release	None

New table layout with vertical column borders

Name & DemCAS ID	Email	Designation	Appl. Status	Local Status	Decision
Demo, Abby E 8335147833	appteam100043@que.org	Master's Program	Verified	Application Received	None

This enhancement was inspired by user feedback.

#### Updated CAS and Cycle Drop-down Sort Order

This enhancement is automatically available for use by all CASs and participating programs. No action is required on the part of any association, school, or program. Contact a member of your account team for more information.

When you edit a user's account, the CAS and cycle selections under the Modify Assignments for Organization drop-down are now sorted in this order:

- Cycle (most recent listed first)
- CAS (sorted alphabetically)

This enhancement improves the readability and navigation of this drop-down.

This enhancement was inspired by user feedback.

### Ongoing Maintenance

Please review the list of scheduled downtime/maintenance and product updates.

Event	Date	Details
Sandbox Environment Refresh	July 10, 2023	The WebAdMIT Sandbox environment (sandbox.webadmit.org) was refreshed with current (cleansed) production data and program configurations. Any test exports, custom fields, etc., in the current sandbox were overwritten.
Sandbox Environment Refresh	August 7, 2023	The WebAdMIT Sandbox environment (sandbox.webadmit.org) will be refreshed with current (cleansed) production data and program configurations. Any test exports, custom fields, etc., in the current sandbox will be overwritten.
Shared Lookup Table Updates	August 27, 2023	Many fields in the Applicant Portal contain predefined answer values that applicants can select; for example, the Country and County fields both have predefined answer values. These values are housed in shared "lookup tables" which are viewable in your CAS's/LINCAS's data dictionary located under the Help panel in WebAdMIT.  Lookup table change requests should be sent to a member of your account team, who will compile and review these requests. The deadline to submit change requests was June 16, 2023. New lookup table values will appear in the Applicant Portal on August 27, 2023 (subject to change). Review the Shared Lookup Table Updates page for more information.

### Upcoming Events

Event	Date	Details
SOLD OUT – Liaison CAS Experience in Chicago, IL	July 24–25, 2023	Refine your skills, broaden your perspectives, and elevate your strategic thinking alongside like-minded higher ed professionals at the Inaugural Liaison CAS Experience, July 24–25 in Chicago, IL. Register now!

# Anatomy of a Release Note

- New Features and Enhancements (broken up by product)
- Ongoing Maintenance
- Upcoming Events
- Table of contents



# User Interface Updates

# Name Label Changes for Clarity and Inclusivity

## Former Label

---

- **Your Name** question → • Renamed **Your Legal Name**
- **First or Given Name** question → • Renamed **Legal First Name**
- **Alternate Name** question → • Renamed **Former Name**
- **Preferred Name** question → • Renamed **My Name**
  
- **Display Name** field removed from the account creation and My Profile pages

## New Label

---

# Notification Banner on Dashboard\*

- CAS custom tips and best practices

*\*Available in select CASs*

The screenshot displays the 'My Application' dashboard. At the top, there are four navigation tabs: 'My Application', 'Add Program', 'Submit Application', and 'Check Status'. Below the tabs, the main content area is titled 'My Application' and includes a descriptive paragraph: 'This dashboard is your application home providing access to each part of the application you need to complete and a high level overview of your progress.' To the left of this text is a 'Latest Notifications' section with a 'View My Notifications' button. On the right, there are two progress indicators: 'Personal Information' with a '6/6 Sections Completed' status and 'Academic History' with a '4/4 Sections Completed' status. A light blue notification banner at the top right contains an information icon and the text: 'Remember to visit the Check Status tab to learn which transcripts, letters of recommendation, and official test scores we received!'.

# Validate Date of Birth with Age

- After an applicant enters their date of birth
- Additional point of review

**Confirm your age**

---

You're **25** years old.  
Is that correct?

[Edit Date of Birth](#) | [Confirm Date of Birth](#)



# New Features



# Chatbot Feature within the Application

- AI chatbot, nicknamed Cassie
- Responses and links custom to the CAS
- If additional help is needed, applicant is forwarded to live support

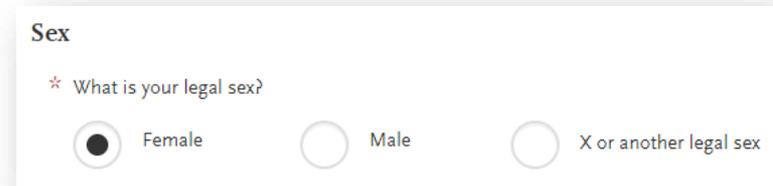
The screenshot displays the 'My Application' dashboard. At the top, there are navigation tabs: 'My Application', 'Add Program', 'Submit Application', and 'Check Status'. The main content area is divided into two columns. The left column features a 'My Application' header, a descriptive paragraph, and a 'Latest Notifications' section with two items: 'Your CASPA login has been updated' and 'Welcome back to the CASPA application! (save this email!)'. Below this is a 'View My Notifications' button. The right column shows 'Personal Information' with a progress indicator '0/8 Sections Completed' and 'Supporting Information' with a progress indicator '0/6 Sections Completed'. On the far right, a chatbot window for 'Cassie' is open, showing a greeting, a list of topics like 'Recommendations' and 'Transcripts & Foreign Evaluations', and a text input field.



# Optionally Add Third Gender/Sex Value\*

- 3<sup>rd</sup> custom gender/sex option
- Supports CASs and programs to meet new guidelines and new options from state and federal governments
- New option appears in WebAdMIT, Liaison Outcomes, CAS API, Analytics by Liaison

*\*Available in select CASs*



Sex

\* What is your legal sex?

Female  Male  X or another legal sex

# Edit In Progress Experiences After Submission\*

- Update in progress experiences (i.e., experiences with no end date)
- You get current information throughout cycle

*\*Available in select CASs*

**Add Your Experiences** ✕

\* Indicates required field

**Experience Type**

\* What type of experience do you want to add?

**Organization**

\* Name

Address

Address 2

City

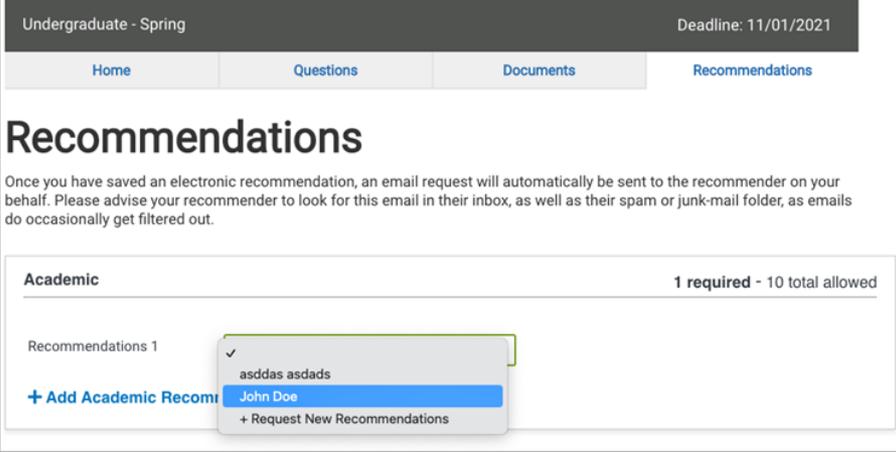
\* Country

Zip Code

\* State/Province

# Applicants Create and Select from Custom Recommender Pool\*

- For CASs that have program-level recommendations
- Enter recommender's information once, and then reselect recommender for other programs



The screenshot shows a web interface for 'Undergraduate - Spring' with a 'Deadline: 11/01/2021'. The navigation bar includes 'Home', 'Questions', 'Documents', and 'Recommendations'. The main heading is 'Recommendations'. Below this, a note states: 'Once you have saved an electronic recommendation, an email request will automatically be sent to the recommender on your behalf. Please advise your recommender to look for this email in their inbox, as well as their spam or junk-mail folder, as emails do occasionally get filtered out.'

The 'Academic' section indicates '1 required - 10 total allowed'. Under 'Recommendations 1', there is a dropdown menu with the following options:

- asddas asdads
- John Doe (highlighted in blue)
- + Request New Recommendations

A '+ Add Academic Recomm' button is also visible.

*\*Available in select CASs*

# Standardized Test Updates and Integrations

- New CLEP Foreign Language Tests\*
  - French, German, and Spanish
- IELTS Official Test Score Integration\*
  - Applicants self-report IELTS test scores and TRF Number in application
  - Applicants contact IELTS to submit official test scores to a CAS
  - You can view official IELTS scores in WebAdMIT and CAS API

*\*Available in select CASs*

# Shared Lookup Table Updates

- Updates to fields with predefined answer values (e.g., **County** and **Country** fields)
- Implemented twice a year
- Affects CAS application and other portals like:
  - WebAdMIT
  - CAS API
  - Liaison Outcomes
  - Analytics by Liaison

## Shared Lookup Table Updates

### Overview

Many fields in the Applicant Portal contain predefined answer values that applicants can select, for example, the **Country** and **County** fields both have predefined answer values. These values are housed in shared "lookup tables," which are viewable in your CAS's UNCAS's data dictionary file.

Periodically, we receive requests to update these lookup tables to include additional response options for some of the standard questions in the Applicant Portal. We strive to respond to these requests while acknowledging that some updates can potentially impact schools leveraging that data. For example, changes to the lookup tables are reflected in data dictionaries. You can use these updates to make changes to your settings for any data extractions, where needed. Portals impacted by lookup table changes include:

- **Analytics by Liaison:** a data reporting tool.
- **API:** a data integration tool.
- **Liaison Outcomes:** an admissions review system and CRM.
- **WebAdMIT:** an admissions review system.

As we update shared lookup tables, applicants will see these changes in the application. You can download updated data dictionary files that will help you if you export data from our portals to your school's Student Information System (SIS) or another database. See below for the timeline and guidance for optimal implementation.

### Timeline

Updates to the shared lookup tables are released biannually in the spring and fall. You can submit lookup table change requests throughout the year to a member of your account team.

For the Fall 2023 lookup updates, review these important dates (note that they are subject to change):

- **June 15, 2023:** final date to submit lookup table value requests.
- **June 23, 2023:** new lookup table values finalized.
- **August 27, 2023:** new lookup table values appear in the Applicant Portal and updated data dictionaries are available.

### Changes to Applicant Portal Lookup Tables

Coming soon!

### Where New Lookup Table Values Appear

On **August 27, 2023**, applicants can select the new options in the application. Once the new lookup table values become available to applicants, they're reflected in the applicant's profile, within the application PDF, and in our products (e.g., **Analytics by Liaison**, **API**, **Liaison Outcomes**, and **WebAdMIT**).

### Changes to the Data Dictionaries and Master Code Lists

When new lookup table values are released, you should download a new data dictionary, which will contain the new lookup table values that correspond to the **Changes to Applicant Portal Lookup Tables**.

Data dictionaries are Excel files that list all the application fields you can search by or export from our products. They include each field name, field type (e.g., numeric, Boolean, etc.), and associated lookup tables. These files can help Information Technology (IT) teams anticipate what will be exported, which is useful information when importing applicant data into a separate Student Information System (SIS).

For **WebAdMIT**, you can also access the **Master Code Lists** for college, degree, and high school data. These master code lists include all the possible values for the select data, but due to the number of possible values, they are stored separately from the standard data dictionary. Additionally, these **Master Code Lists** are updated once a year in the spring.

If your school imports these fields directly from our system to yours, these new options will begin appearing in your exports as applicants select them. If you currently export data from our portals to your school's SIS or another database, share these new lookup table values and data dictionaries with your IT team. Additionally, if you created a "crosswalk" from our portals to your local data in your SIS/CRM, you may need to update this crosswalk for the newly added options.

To access a product's data dictionary:

- **Analytics by Liaison:** not applicable.
- **CAS API:** use the data dictionary API endpoint.
- **Liaison Outcomes:** under the Import/Export section in the Settings menu, click **Field Dictionary** to view the fields available in Outcomes.
- **WebAdMIT:** under the Help panel in the Menu Bar, click **Data Dictionary Page** to generate a new data dictionary. You can also download **Master Code Lists**.

— Table of contents

- Overview
- Timeline
- Changes to Applicant Portal Lookup Tables
- Where New Lookup Table Values Appear
- Changes to the Data Dictionaries and Master Code Lists



## Need help with new features?

- Review the release notes
- Contact a member of your account team to learn what's turned on for your CAS
- Check out the WebAdMIT Help Center
- Contact the Client Support Specialist team at:
  - [webadmitsupport@liaisonedu.com](mailto:webadmitsupport@liaisonedu.com)
  - 857-304-2020

# Liaison Academy

***Mission:** foster excellence in admissions through the production and dissemination of information and knowledge.*

## Your time is important!

### Use Liaison Academy to:

- Quickly access all Liaison product resources
- Learn more about Liaison's products
- Educate and train staff who join your team

 Register at [learn.liaisonedu.com](https://learn.liaisonedu.com)

### Create an account to access:

- Live training events
- Onboarding toolkits
- On-demand eLearning courses
- Product learning paths
- Professional development workshops
- Training videos
- Webinars

A diverse group of people in a modern office setting. A woman in the foreground is raising her hand, smiling. Other people are visible in the background, some looking towards the camera and others looking away. The overall atmosphere is positive and professional.

# Q&A

The logo for the Liaison CAS experience. It features a stylized graphic of a cluster of dots in white and yellow on the left. To the right of the graphic, the text reads: "LIAISON" in a small, white, sans-serif font; "CAS" in a large, bold, yellow, sans-serif font; "experience" in a smaller, white, sans-serif font; and "JULY 24-25 2023" and "CHICAGO, IL" in a small, white, sans-serif font stacked at the bottom.

LIAISON  
**CAS**  
experience  
JULY 24-25 2023  
CHICAGO, IL



# Thank You

Liaison Academy  
Education & Knowledge Team  
[academy@liaisionedu.com](mailto:academy@liaisionedu.com)