



LIAISON

CAS

experience

JULY 24-25 2023

CHICAGO, IL

# WebAdMIT Innovations

What's Next for Your Trusted Admissions Platform?

Date: July 25<sup>th</sup>, 2023





# Agenda

1. The WebAdMIT Platform
2. Key Delivered Enhancements 2022-2023
3. Upcoming Roadmap
4. Future Vision
5. Ask Us Anything

# Meet Our Presenters



**Mike Margitich**

*VP, CAS Products*

**Liaison  
International**



**Josh Huber**

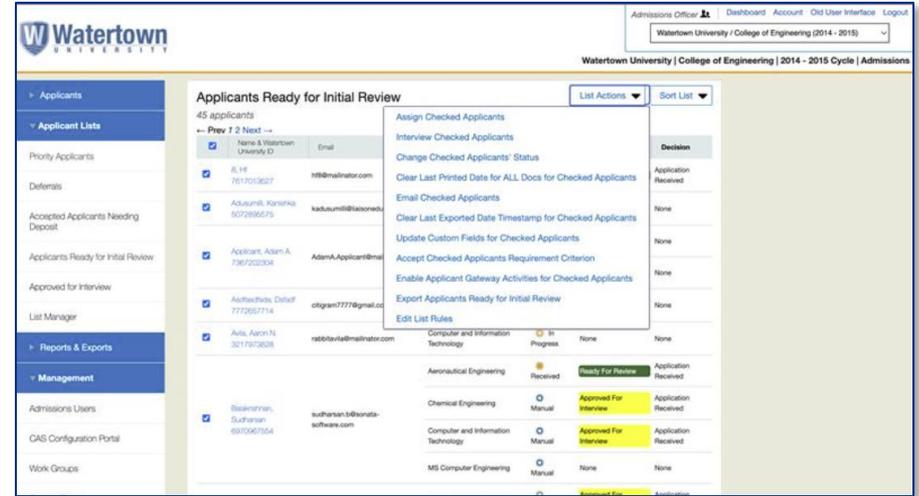
*Product Manager, WebAdMIT*

**Liaison  
International**

# The WebAdMIT Platform

## Used by 100s of Campuses to:

- Assign admissions workflows and track progress
- Schedule, manage, and score interviews
- Benchmark and compare programs
- Track and manage all communications
- Forecast and model enrollment trends



Years in Market

**12+**

Active Users

**50k+**

Page Views /Week

**1m+**

Complementary With CAS

Liaison is committed to the needs of our community of WebAdMIT users and will continue to deliver exciting features in the coming years.



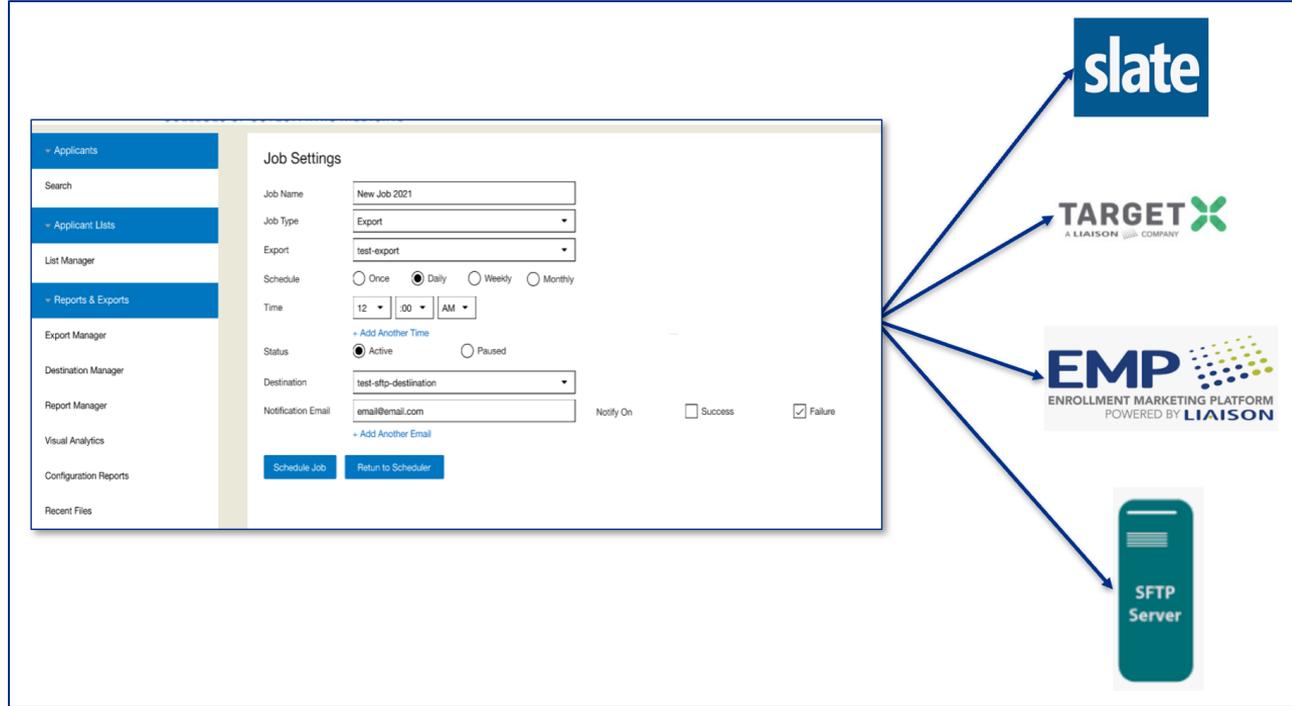


# Key Delivered Enhancements 2022-2023

# SFTP Delivery

Scheduled, secure delivery of:

- Export Manager Files
- PDF Manager Batches
- In Progress Data



# Integration Help Center

Simple-to-use resources help you plan and execute your data integration projects across all Liaison products.

We're always here to help.

## Integration Help Center

Welcome to the Integration Help Center. Here you can access information about data integration in general, as well as API and integration information for Liaison's suite of products.

Any questions? Contact us for support.



Getting Started with Data Integration, APIs, and Connectors

ADMISSIONS  
by LIAISON

Admissions by Liaison API and Integrations

SLIDE ROOM  
by LIAISON

SlideRoom API

TARGET X  
by LIAISON

TargetX Integrations

Back Forward Home Open article Q search

### What is Data Integration?

Data Integration takes records from one system and moves them to another. In the context of Liaison and higher education admissions, we're talking about moving person and application records, and sometimes application documents, from Liaison's platform to your local systems.

**Data Integration**

Data Integration takes **Person** and **Application** records... from one system... and moves them... to another system...

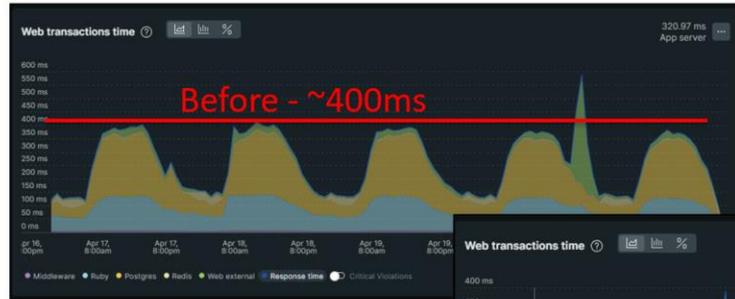
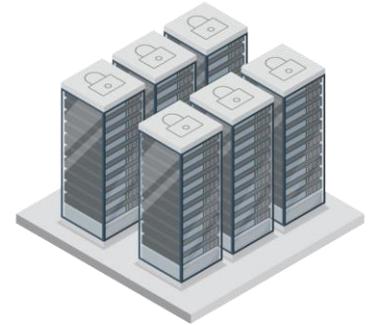
so that your **people** can do their **work!**

While each software platform has its own tools and requirements, the general features of each data integration are the

<https://help.liaisonedu.com/Integration>

# Secure and Scalable Cloud Upgrades

Access massive amounts of storage, simple scaling up of capacity for major deadlines, and redundancy / resilience that eclipses our old capabilities.



# Better Test-Optional Reviews

Configure your Work Groups to show or hide *individual* test types to online application readers as well as downloaded PDFs,

The screenshot shows a 'Standardized Tests' review interface. At the top, there are tabs for 'ACT', 'MCAT', and 'SAT'. Below is a table with columns: Test, Status, Test Date, Official Results, Official Received By, Official Received Date, Graphical Result, Overall Result, Confidence Band, Overall Percentile, Result Notes, and Details. A row shows 'ACT (After Sept 2015)' with status 'Taken', date 'Sep 22 2018', and an overall result of '29'. A 'Details' button is visible next to this row.

A callout box on the left shows a navigation menu with the following items: Notes, Personal Information, Personal Statements, Prerequisite GPAs, Requirements, Scoring, Socioeconomic Indicators, Standardized Tests (expanded), All Subpanels (with a plus icon), ACT, MCAT, SAT, and Video Interview. Below the menu are 'Submit' and 'Return to Manage Work Groups' buttons.

A callout box on the right shows 'ACT (After Sept 2015) Details' with the following scores: ACT Composite Score 2015 (29), ACT English Score 2015 (30), ACT Math Score 2015 (26), ACT Reading Score 2015 (20), ACT Science Score 2015 (28), and ACT Writing Score 2015 (5).

In the center, a bulleted list contains: ACT, GRE, MCAT, SAT, and Etc...

A callout box on the bottom right shows an 'ACADEMIC HISTORY' section with the following data:

HIGH SCHOOL ATTENDED	
Name:	WALNUT HILLS HIGH SCHOOL
City:	Chickasaw
State:	Ohio
Graduated:	Yes
Date of Graduation:	09/2019

STANDARDIZED TESTS											
UNOFFICIAL ACT <a href="#">view more tests</a>											
Date:	ACT 10/2018	English:	30	Mathematics:	30	Reading:	26	Science:	28	Writing:	5
Date:		09-22-2018	Composite:		29						

UNIVERSITY ATTENDED			
005125 UNIVERSITY OF CINCINNATI - MAIN CAMPUS			
Start Date:	08/2019	Still Current:	Yes
End Date:	Current	Primary:	Yes
Status:	Other	Externally Accredited:	Yes
Accredited By:		Higher Learning Commission	

# Mail Merge for Custom Questions

Better options are available to personalize email communications from WebAdMIT using CAS-level Custom Questions.

The screenshot displays an email composition window. At the top, the 'Reply-To' field has three radio button options: 'Myself Kristin McAuliffe <kristinbuacct@gmail.com>', 'CDS admissions CDS admissions inbox <cds-admissions@bu.edu>', and 'Raghav Raghav <raghavendra.vv19@gmail.com>' (which is selected). Below this, the 'Template' is set to 'CustomQ Template', the 'Subject' is 'CustomQTest', and the 'Priority' is 'Normal'. An 'Attachments' section includes an 'Add Attachment' button. Action buttons at the bottom of the header include 'Send', 'Save Draft', 'Send preview...', 'Delete', and 'Return to Applicant'.

The main body of the email shows a rich text editor with a toolbar containing bold, italic, underline, font, size, bulleted list, numbered list, link, unlink, image, and other icons. The text 'Hi

Below the text are five placeholder boxes for custom questions: (BU-CDS) Custom1, (BU-CDS) Custom2, (BU-CDS) Custom4, (BU-CDS) Custom3, and (BU-CDS) Custom5.

A context menu is open over the first placeholder, titled 'Select Field for Mail Merge'. It lists several categories with expandable options:

- ▶ Applicant
- ▼ BU-CDS Questions: Additional Questions
  - (BU-CDS) Custom1
  - (BU-CDS) Custom2
  - (BU-CDS) Custom3
  - (BU-CDS) Custom4
  - (BU-CDS) Custom5
  - (BU-CDS) Custom6
  - (BU-CDS) Custom7
- ▶ Current Mailing Address
- ▶ Permanent Mailing Address
- ▶ Personal

# Numerous Ideas Portal Enhancements

We're always listening to ideas – big and small – and looking for ways to make your day-to-day use of WebAdMIT smoother and simpler.

WebAdMIT User Type Search

Admissions Users

Email  Cycle

Last Name  Institution

First Name  Organization

CAS  Program Name

User Type  Work Group

Admission  
Association  
Institution  
LiaisonAdmin

Active

Institution Manager

Search  Reset Criteria

Clean up ordering of Users on search/list screen

Email	Last Name	First Name	CAS	Cycle	Institution	Organization	Program Name
00001529@csusb.edu	Shultz	Kenneth	Cal State Apply	2019 - 2020	California State University	San Bernardino Graduate (5992)	Psychology - Industrial/Organizational
			Cal State Apply	2020 - 2021	California State University	San Bernardino Graduate (5374)	Industrial and Organizational Psychology
			Cal State Apply	2022 - 2023	California State University	San Bernardino Graduate (5573)	Industrial and Organizational Psychology

Update default PDF download behavior for better security



## Even More Ideas Portal Enhancements

We're always listening to ideas – big and small – and looking for ways to make your day-to-day use of WebAdMIT smoother and simpler.

Add Last Printed Date to Applicant-Uploaded Documents

Add column to PDF Manager and Export Manager list pages indicating whether last printed date will be set

Add Last Printed Date into WebAdMIT UI and Panels

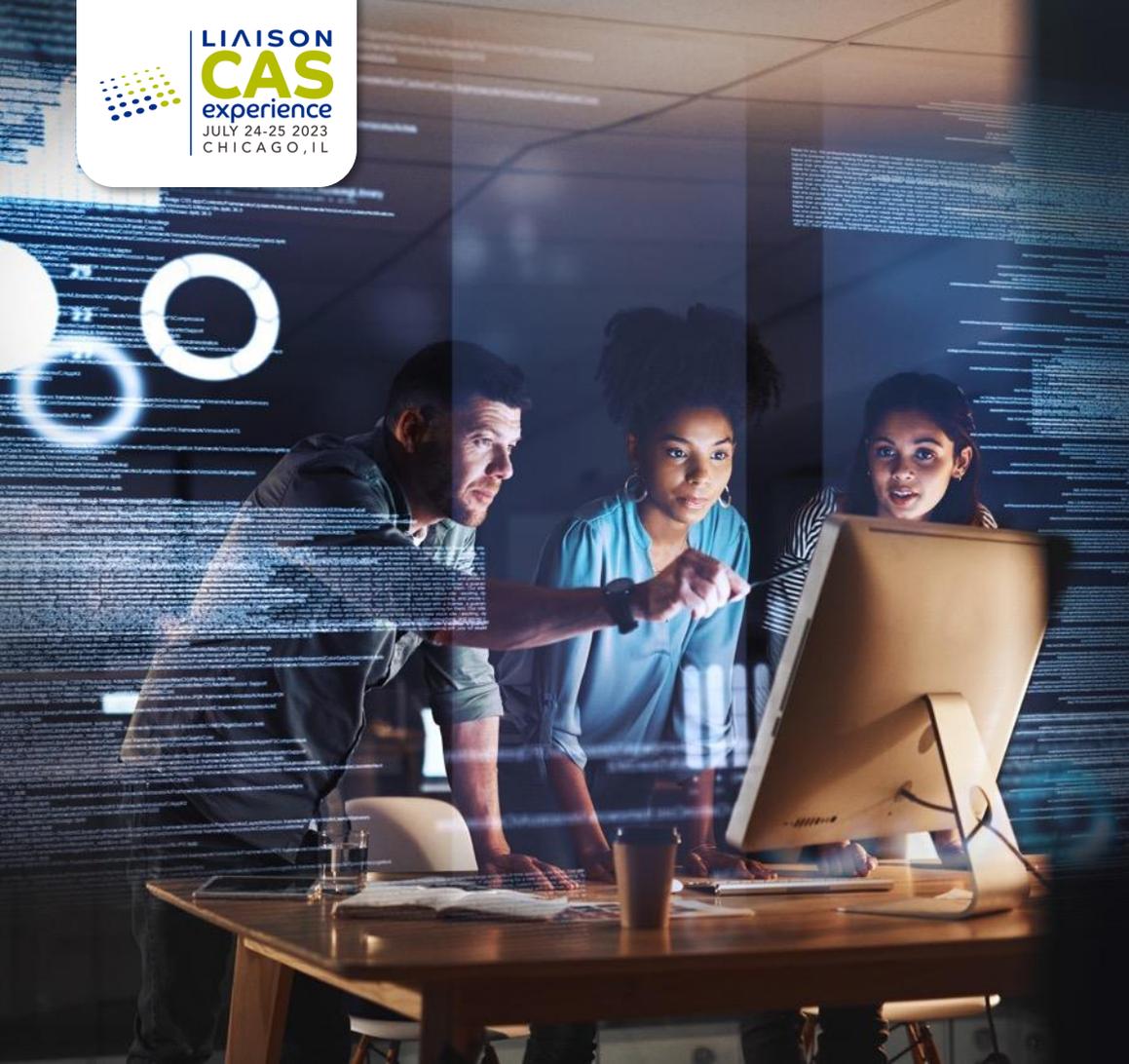
# Streamlining the WebAdMIT UI

All users moved to a single WebAdMIT look and feel in preparation for a broader UX upgrade in 2024-2025.

The screenshot displays the WebAdMIT interface with several key components:

- Top Navigation:** A header bar with the user name "Andres Lopez" and profile icon, and links for "Dashboard", "Account", "End Impersonation", "New User Interface", and "Logout". Below this, the current page title is "University of Southern California / Annenberg School for Communication and Journalism (2022 - 2023)".
- Left Sidebar:** A vertical menu with options: "Applicants", "Assignments", "Interviews", "Board", "Progress Applicants", and "Old Applicants".
- Search and Filter Panel:** A "Search Applicants" section with "Active Filters: Local 1966 applicants". It includes input fields for "Last Name", "First Name", "ADEA AADSAS ID", "DENTPIN", "State/Province", and "Email Address".
- Designations Modal:** A pop-up window titled "Designations" with the instruction "Select the designations to apply the local status to". It contains a checkbox for "University of Colorado School of Dental Medicine (COL)" and buttons for "Check All" and "Uncheck All".
- Dashboard and Applicant Table:** A "Dashboard" sidebar with a date selector for "November 2, 2022" and a menu for "Message Board", "Staff", "Applicants", "Information", "Assignments", "Configuration", "Schedule", "Timetrack", and "Scores & Ranks". The main content area shows a table titled "Watertown Radiation Oncology Residency Program Applicants" with columns for Photo, AppID, Name, Degree, and Education.

Photo	AppID	Name	Degree	Education
	426689659	Bertini, Andre	MD	Florida State University
	6414941884	Bonini, Wayne	MD	Drexel University College of Medicine
	8214344344	Calvo, Carlos	MD	Frank H Netter MD School of Medicine at Quinnipiac University
	4740050410	Castillo, Flora	MD	Columbia University Vagelos College of Physicians and Surgeons



# Upcoming Roadmap



# WebAdMIT Automation

Build simple, visual rules to automate time-consuming bulk activities based on specific targeted criteria.

Target: Fall 2023



Example Triggers	Automations
Applicant Moves to an Application Status	Assignment is Created for Specific/Random Reviewer(s)
Assignment is Completed	Interview is Created for Specific/Random Interviewer(s)
Interview is Completed	Email is Sent
<b>Applicant Meets List Criteria</b>	Complete a Requirement <b>Change Local Status</b> Email is Sent
Ideas for automations are welcome!	

Applicants

Applicant Lists

- GPO - Masters Faculty - Move to Chair
- GPO - Masters Faculty - Move to Reject Hold
- GPO - URM applicants (r,ss,t) Run list, update custom field URM - Yes
- GPO - Scholarship Review Complete INTL
- GPO - Scholarship Review Complete Dom
- GPO - Scholarship Review Complete Perm Res
- GPO - PhD 1: Move to GPO Processing - PhD Admit
- GPO - PhD 2: Move to GPO Processing - Waitlist
- GPO - PhD 3: Move to GPO Processing - Reject

### GPO - ECE PhD to IDS review - assign faculty, change status

Automation Type: Local Status

Local Status: LEAP (Spring) - Offer Rescinded

Decision: Not Admissible

Email Template: No Email Template

Send Attached Email Template:

Programs:  LEAP - Sp

[Edit Local Status](#) [Close](#)

Local Status

Change Local Status To **Incomplete**

Change Decision To **No Decision**

Send Email Using Template **No Email Template**

Program Details: **27 Programs**  
**1 Deleted**

Local Status

Change Local Status To **LEAP (Spring) - Offer Rescinded**

Change Decision To **Not Admissible**

Program Details: **1 Programs**

Local Status

Change Local Status To **ECE - EP Applications in Review**

Change Decision To **No Decision**

Program Details: **2 Programs**  
**2 Disabled**

Local Status

Change Local Status To **PhD - Accepts Offer**

Change Decision To **Accepted Offer**

Send Email Using Template: **Enrollment Confirmation Email: PhD Fall**

Program Details: **6 Programs**  
**6 Deleted**

### Local Status

Change Local Status To **Incomplete**

Change Decision To **No Decision**

Send Email Using Template **No Email Template**

Program Details: **27 Programs**  
**1 Deleted**

# Ideas Portal: Bulk User Editing

Activate/de-activate cycles, add users to Work Groups, add users to Programs – all with a single click.

Target: Fall 2023

The screenshot displays the 'Admissions Users' interface. At the top, there are buttons for 'Create Admission Users', 'Bulk Actions', and 'New User'. Below these are input fields for 'Email', 'Last Name', 'First Name', and 'CAS', along with dropdown menus for 'Cycle', 'Program Name', 'Work Group', and 'Active'. A 'Search' button and 'Reset Criteria' link are also present. A table lists users with columns for 'Email', 'Last Name', 'First Name', and 'CAS'. Two users are highlighted with checkboxes: Adam Ketner and Adam Ramey. An 'Institution Manager' label is visible below the table. A modal window titled 'Create User Identities for checked Applicants' is open, showing a dropdown for 'WebAdMIT Administrators' and a checkbox for 'Do not change Work Group...'. Below this, a 'Program Assignments' section has a checkbox for 'Do not change Program Assignments' and a list of programs with checkboxes: 'Adapted Physical Education Added Authorization (Fall)', 'Designated Subjects Career and Technical Education - Applicants who hold a Bachelor Degree (Fall)', 'Designated Subjects Career and Technical Education - Undergraduate Applicants Only (Fall)', 'Education Specialist: Early Childhood Special Education (Fall)', 'Education Specialist: Extensive Support Needs (Fall)', 'Education Specialist: Mild to Moderate Support Needs (Fall)', and 'Make this item available for all new programs that are added to WebAdMIT'. At the bottom of the modal are buttons for 'Check All', 'Uncheck All', and 'Submit'.

# Better Custom Questions UI and Permissioning

View or permission custom question blocks individually vs. today's all-or-nothing approach; also extends to the PDF.

**Target: Fall/Winter 2023**

Question Block	Question	Answer
Academic Infractions and Conduct	Have you ever been disciplined for academic performance (e.g. academic probation, disqualification, etc.) by any college or university?	No
Academic Infractions and Conduct	Have you been academically disqualified at any college or university?	No
Academic Infractions and Conduct	Have you ever been disciplined for student conduct violations (e.g. suspension, expulsion, etc.) by any college or university?	No
Academic Infractions and Conduct	If yes, please explain and disclose institution for each violation.	-
Academic Standing	Are you in good standing with your last school attended?	Yes
Additional Information Release	I authorize the California State University to release to my school or college counselor/counseling office (or sponsoring agency) information regarding my application, including test scores, transcripts and other supporting documents, as they relate to my admission and scholarship status. If you do not check the box, CSU may not inform your school or counselor whether you have applied or been admitted.	Check box to Acknowledge
AP (Advanced Placement)	Do you have	No
AP (Advanced Placement)	AP Exam 1:	-
AP (Advanced Placement)	AP Exam 1.0	-
AP (Advanced Placement)	AP Exam 1.5	-
AP (Advanced Placement)	AP Exam 2:	-

## Available Panels and Sub-Panels

- ▶ Achievements
- ▶ Applicant Gateway
- ▶ Assignments
- ▼ Cas Custom Questions
  - All Subpanels + 🗑️
  - Cas Custom Questions
- ▶ Contact Information
- ▶ Custom Fields
- ▶ Custom Questions
- ▶ Designations
- ▶ Documents
- ▶ Education
- ▶ Electronic Transcript

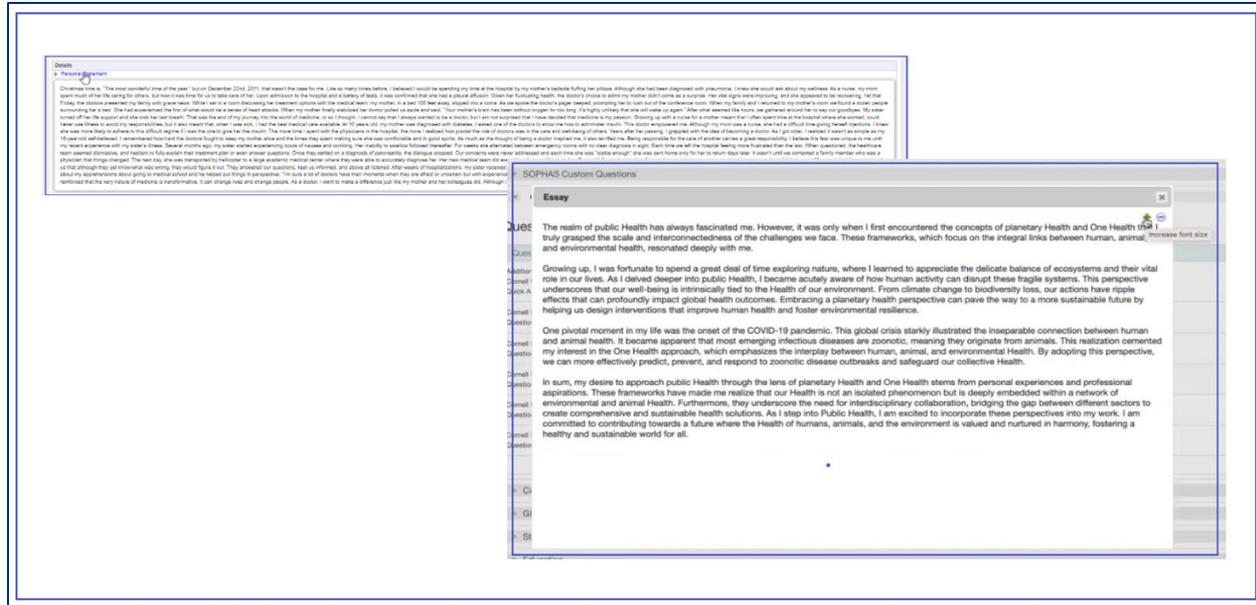
# Ideas Portal: Easier Viewing of Essays

Improve the display of essay questions in WebAdMIT.

Users will be able to:

- Increase/decrease font
- Resize the window
- Move the window

Target: Fall 2023



# Self-Service Applicant Deferrals

Copy applicant and application materials forward to a new cycle on demand vs. waiting to schedule bulk process with Liaison team.

**Target: Fall/Winter 2023**

The screenshot displays the 'Copy Applicant to New CAS' interface. The main form includes fields for 'CAS Instance' (CASPA-2022), 'Copy To' (BU-QST 2021-2022), 'Organization' (BU-Questrom School of Business (5363)), and 'Program' (Executive MBA, MBA+ MA in Economics (Part-time), Health Sector MBA (Part-time)).

A 'New Local Status' dialog box is open, showing the following options:

- Title: Deferred Applicants
- Active
- Decision Code: Deferred

Below the dialog box, a 'Designations' table is visible, showing the following data:

Designation	Local Status	Decision Code	Application Status
Master of Science in Nursing - Nursing Administration	Deferred Applicants	Deferred	Complete



# WebAdMIT Future Vision

# A Modern, Visual UX for WebAdMIT

We are currently exploring concepts to bring a more modern, intuitive, and graphical UI to the WebAdMIT platform. Our aim is to create a unified, elegant look and feel to all campus-facing Liaison products

**Target: 2024-2025**

Watertown University (2021-2022) WebAdMIT

### Designation by App Status

In Progress: 260 | Received: 10 | Complete: 4 | Verified: 0

### DESIGNATION BY DECISION (306)

- No Decision
- Withdrawn
- Offer Made
- Waitlist
- Deferred
- Denied
- Offer Accepted
- Declined
- Other

### MY ASSIGNMENTS

January 2022

- Franco, John  
Review Team Assessment
- Grande, Toniann  
Committee Review
- DeMonte, Justine  
Committee Review

[VIEW ALL](#)

### Recently Updated Applicants (3,276)

<input type="checkbox"/> Name	Email	Status Updated
<input type="checkbox"/> Amy Adams	john.doe@example.com	Offer Made to Offer Accepted.
<input type="checkbox"/> Theresa Webb	debra.holt@example.com	Offer Made to Offer Accepted.
<input type="checkbox"/> Toniann Grande	tg1234@gmail.com	Reviewed
<input type="checkbox"/> Bessie Cooper	jessica.hanson@example.com	Assessment Complete
<input type="checkbox"/> Dianne Russell	tanya.hill@example.com	Committee Reviewed
<input type="checkbox"/> Jerome Bell	debbie.baker@example.com	Offer Made to Offer Accepted.

# Our Pledge To You

**WebAdMIT has been your trusted admissions management platform for over 12 years, and we will continue to invest in that platform to meet your needs in the coming years.**

**Liaison is also committed to continue our investments in next-generation products that we're excited to show you – when you're ready.**

A diverse group of people in a modern office setting, with a woman in the foreground raising her hand. The image has a blue tint.

Q & A

The logo for Liaison CAS experience, featuring a cluster of yellow and white dots to the left of the text.

LIAISON  
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# Thank You

Mike Margitich  
Liaison International  
[mmargitich@liaisonedu.com](mailto:mmargitich@liaisonedu.com)

Josh Huber  
Liaison International  
[jhuber@liaisonedu.com](mailto:jhuber@liaisonedu.com)