Graduate Admissions:
Applications Processing

Version 1.8
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1. Introduction

The purpose of this manual is to provide information and process steps to enable you to manage Graduate Student Admissions.

1.1 Intended Audience

This manual is intended for Graduate Admissions Office (GAO).

1.2 Pre-requisites

It is assumed that you have read the Quick Reference Guide: Logging into eVision, and are able to navigate around eVision.

1.3 Objectives

On completion of this manual you will be able to:

- Manage the processing of the graduate applications completeness check and supporting materials in eVision.
- Quick Application Processing
  - Deduplication.
  - Assign applications to GAF members for processing.
  - Check the supporting materials submitted by the applicant, and check for validity (e.g. is the document submitted as a CV really a CV).
  - Mark the materials as having failed the check.
  - Have to be able to record that they have a query about the application.
  - Set to submitted.
  - Be able to upload documents received by the applicant.
  - Amend submission date.
- Processing Individual Applications
  - Search for Individual Applications
  - Interrogate Application Details
  - Waiver
  - Make Mandatory
  - Add / Edit Referees
  - Task Selection Entities explained
  - Handling Applications Queried
  - Submitted Graduate Application Dataview
1.4 Conventions

- Indicates additional useful information.
- Indicates an important piece of information, take particular care to read this information.
- Indicates there is something that you should not do, take particular care to read this information.

**Bold Text** Indicates menu names.

*Italic Text* Indicates window, screen, page or dialogue box titles.

[F4] Keys on your keyboard are indicated in **bold text** enclosed in square brackets [ ].

File > Open Moves through a navigation path are indicated with a >. In this case you would click on the **File** menu, then select **Open**.
2. **Accessing eVision**

To access the Quick Reference Guide with instructions on how to login and logout of eVision, please enter the URL below or use the following link and select “Access and Navigate eVision” under the eVision link.

[https://www1.admin.ox.ac.uk/studentsystems/support/guides/](https://www1.admin.ox.ac.uk/studentsystems/support/guides/)

3. **Processing Online Graduate Applications**

Online applications are submitted by the applicant via the on-line application form which are then transferred to the Admissions area in SITS:Vision.

Graduate Admissions and Funding (GAF) can then support four specific business processes in their department:

- Process Online Applications
- Process Supporting Materials
- Manage Completeness Checks
- Manage Incomplete/Late Applications.

GAF perform a preliminary check of graduate applications to assess the validity of supporting materials (e.g. whether a document submitted as a transcript is indeed a transcript), and the completeness of the application before the applications are assessed by University Admitting Bodies (UABs). This is a service that GAF provide to both applicants to help ensure their applications are complete for the relevant deadline, and to UABs who can benefit from not having to assess incomplete applications unless they choose to do so. The functionality that will support these processes is being developed as a part of the University of Oxford’s implementation of graduate admissions processes in SITS:Vision and eVision.

To assess the applications and its supporting materials, members of GAF will need to:

- Deduplicate applications
- Assign applications to GAF members for processing.
- Check the validity of supporting materials submitted by the applicant, (e.g. is the document submitted as a CV really a CV).
- Mark materials as having failed the check.
- Record a query about the application.
- Set documents to submitted.
- Be able to upload documents received by the applicant.
- Amend submission date.

This eVision functionality is accessed via the Admissions menu, from the Graduate Applications and Funding - Process Applications menu, and divided into the following options, the details of which are below:

1. Assign Applications for Processing
2. Quick Application Processing
3. View applications marked as query
4. Process Individual Applications

In SITS:Vision the following functionality can be managed.

1. Deduplication
3.1 To access the Graduate Applications and Funding functionality

1) Log into eVision

2) Click on the menu item

The available options will be displayed

---

3.2 Assign Applications

1) The assign applications functionality allows authorised Users to assign unprocessed graduate applications to a selected team member. It contains links to ‘Manage Users’, which will be used for adding or removing Users to whom applications can be assigned, and to ‘Set Selection Criteria’ which will enable Users to retrieve specific applications for assigning for processing.

The screen displays the following information:

- **Total number of unassigned applications**: Graduate Applications in the current academic year that have not been processed by GAF yet, and are not assigned to a team member for processing.
- **Assigned for processing to a team member**: Total number of unprocessed graduate applications currently assigned to the stated team member.
- **Total Assigned for Processing**: Graduate Admissions Applications already assigned to all team members.
- **Clear**: Clear all existing assignments for the relevant User.
- **Clear All**: Clear all existing unprocessed team assignments.
- **Queried**: Display a list of applications currently assigned to the relevant User which have a Query status.
3.2.1 Assign (10, 25, 50, 100) Applications

A specific number of Applications can be assigned to a specific User.

To assign an application to a Team User:

1) Select a team member to assign applications to either, 10, 25, 50 or 100 at a time.

2) Click on the Assign Applications button.

3) On successful completion, all displayed values on the page will be recalculated.

4) To return to the Admissions menu click on the **Return to Admissions Menu** button.

3.2.2 Set Selection Criteria

This functionality allows you to only retrieve specific Applications to be assigned to a GAF User

To set selection criteria choose from one or many of the drop down lists:

1) Division
2) Department
3) Type of Application
4) Enter a Program
5) Enter a Submission Date

You can then either Cancel the criteria using the button or press to run the search.

The selected retrieval criteria which will be displayed at the top of the Manage Users page. Total Number of Unassigned Applications on the page will be recalculated using the updated selection criteria.

Note: This selection criteria is not saved and therefore will be re-set when the screen is revisited.

3.2.3 Manage Users

Manage Users displays a new screen containing details of current team members.

Select the button which is accessed via the Allocate Applications for Processing screen.

1) A member of the GAF office can be added to be able to receive applications.
2) Removed as no longer required to process applications.

The maximum number of GAF Users is 15.

The screen contains details of the team members who are currently authorised to process applications:

- **Name** – Full Name
- **SSO Name** – Single Sign On
- **Email** – Internal email address
- **Applications assigned for processing** - Number of records currently assigned for processing to this User.

### 3.2.3.1 Adding a New User

To Add a New User to allocate applications to:

1) Click on the **Add** action button on the next available line.
2) Enter the members SSO or full name into the search for a member of staff field.

A dynamic search is used to list any Users that match the SSO or Name entered

3) Once located select **Save**
4) The **Back** button leads to the Manage Users screen.
5) A confirmation message appears when a new User is added or removed.

6) Select **Return to Manage Users** to see the newly added User.

### 3.2.3.2 Removing a User

1) You can remove Users by clicking the **Remove** action button against the individual to be removed.

2) Select **Return to Manage Users**

**Note:** A User cannot be deleted from this screen if they currently have applications assigned to them. The Assigned applications will need to be cleared before they can be Removed. Removing them here will prevent further applications being assigned to them.
<table>
<thead>
<tr>
<th>Name</th>
<th>SSO Name</th>
<th>Email</th>
<th>Applications Assigned for Processing</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martin Robert Eley</td>
<td>QUIT0270</td>
<td><a href="mailto:pentest1@admin.ox.ac.uk">pentest1@admin.ox.ac.uk</a></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Martha Zara Springfield</td>
<td>GAFADM01</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Mary Claire Thompson</td>
<td>GAFADM02</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Julie Susan Cameron</td>
<td>GAFADM03</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>


3.3 Quick Application Processing

This eVision functionality will allow authorised Users to access the unprocessed graduate applications that have been assigned to them in order for them to be reviewed and processed.

This is intended as the quick processing section. You can perform initial assessment of document validity (e.g. is the document submitted as a transcript really a transcript), amend submission date, upload any documents received, and where relevant attach a query to an application. The system will compare the documents submitted with course requirements, update the calculated submission date if relevant and assign the completeness flag to an application.

1) Select the Quick Application Processing action link which will retrieve details of the first application in your allocated list. The list is retrieved in Submission date sequence, oldest first.

Note: If you have no allocated applications then a message will be displayed and they will be returned to the Graduate Admissions menu.

3.3.1 Review Application

Displayed will be details of the first application in your allocated list. The list is retrieved in Submission date sequence, oldest first.

The screen will display details about, the Application, the associated Supporting Materials and Clearance Checks. You will be able to review the supporting materials, change the status of clearance checks, amend the submission date, Query (Hold) an application or Process the application.
Note: If the applicant has also uploaded a document(s) via the applicant self-service facility, then an additional table will appear below the Supporting Documents. (See sections 3.3.4.1).
3.3.2 Applicant Information

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
<td>Mr Craig Cyan</td>
<td>701595</td>
<td>28/Jan/1990</td>
<td>Male</td>
<td>16 July 2015</td>
<td>2015/16</td>
</tr>
<tr>
<td>Student Number</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Date of Birth</td>
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<tr>
<td>Sex</td>
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<td>Calculated Submission Date</td>
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<td>Year of entry</td>
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<td>Mode of Attendance</td>
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<tr>
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<tr>
<td>College</td>
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<td></td>
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<td>Start Term</td>
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<td>Original Submission Date</td>
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<td>Fee Status</td>
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<td>Requested Re-Use</td>
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<td></td>
</tr>
</tbody>
</table>

Basic information about the applicant and their application will be displayed in a table layout at the top of the page. Information will include:

- **Applicant name**: Title, Forename and Surname.
- **Student Number**: Students specific student number
- **Date of Birth**: dd/mmm/yyyy
- **Sex**: Male / Female
- **Calculated Submission Date**: Initially set to same as Submission date but updated to reflect latest submission date of mandatory supporting materials. Used for assigning an applicant to the Application Deadlines (Gathered Fields).
- **Year of entry**: Academic year applied for
- **Mode of Attendance**: Full time or Part time
- **Application Status**: e.g. Active, Withdrawn etc
- **Programme**: MCR code and Full Course Title
- **UAB**: Department short name.
- **College**: Current College Selection/Assignment or Not Allocated if none allocated yet.
- **Start Term**: Term of entry applied for
- **Original Submission date**: Date the application was submitted by the applicant.
- **Fee Status**: Calculated Fee status
- **Application Type**: Standard, Readmission, Rhodes, Rhodes Readmission
- **Requested Re-Use**: Yes if applicant requested re-use of references from another application. The User should select Query for this application and process through the Process Individual Applications screen. Users should use the Process Individual Applications screen to access other applications.

3.3.3 Application Documents

Application documents are listed. All supporting documents associated with the application will be hidden in a collapsed list which can be expanded on request. As a default, the only document immediately visible will be the merged pdf of the application as submitted by the applicant. This document contains the application form and all the documents submitted by the applicant.
The Application Form can be looked at alone or with the supporting documents, by selecting the View link, the appropriate merged .pdf file will be displayed.

Select the List all documents link that will show all the different individual supporting documents attached to this Application.

### 3.3.4 Supporting Documents

<table>
<thead>
<tr>
<th>Type</th>
<th>Original Submission Date</th>
<th>Document Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application form</td>
<td>17/Jul/2015</td>
<td>View</td>
</tr>
<tr>
<td>Application Form with Supporting Documents</td>
<td>17/Jul/2015</td>
<td>View</td>
</tr>
<tr>
<td>Supporting Documents</td>
<td>Various</td>
<td>View</td>
</tr>
</tbody>
</table>

All supporting materials associated with the application will be hidden in a collapsed list which can be expanded on request. When clicking List all documents, the Supporting Documents table will appear.

For each document the following will be detailed:

- **Type**: e.g. Application form, CV etc.
- **Uploaded by**: Full Name of User that uploaded the document.
- **Received Date**: Date the document was submitted by the applicant.
- **Uploaded date**: Date document uploaded, either when application submitted or during processing.
- **Notes**: Any notes entered against the document during upload.
- **Document Actions**:
  1. View - Allows you to open the selected item of supporting materials in the relevant application; e.g. Word, Acrobat reader, etc.
  2. Remove - Allows you to mark the document as failed, and remove it from the application completeness calculation. Note the document will still appear in the merged pdf file available to UAB's.
3.3.4.1 **New Supporting Documents from Applicant Self Service**

If the applicant has also uploaded a document(s) via the applicant self-service facility, then an additional table will appear below Supporting Documents.

<table>
<thead>
<tr>
<th>New Supporting Documents from Applicant Self Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
</tbody>
</table>

There are three options available; ‘View’, ‘Remove’ or ‘Accept’.

‘View’ will open the PDF document and ‘Remove’ will remove the document from the application.

Choose ‘Accept’ and then ‘Confirm’ in order to move the document (e.g. Transcript) into the Supporting Documents.

Confirm that you wish to accept the document below.

<table>
<thead>
<tr>
<th>Document to Accept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
</tbody>
</table>

Then choose ‘Return’ to see the document added under Supporting Documents.

<table>
<thead>
<tr>
<th>Accepted Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supporting Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>CV</td>
</tr>
<tr>
<td>English language test result</td>
</tr>
<tr>
<td>Merged Reference 1</td>
</tr>
<tr>
<td>Merged Reference 2</td>
</tr>
<tr>
<td>Merged Reference 3</td>
</tr>
<tr>
<td>Reference 3</td>
</tr>
<tr>
<td>Transcript</td>
</tr>
</tbody>
</table>

**Note:** If this applicant has not uploaded any documents through the Applicant Self Service facility, then the New Supporting Documents from Applicant Self Service section will not appear.
3.3.5 Query (On Hold)

Select **Query** which will open a new screen where you will be able to confirm the query and add notes to explain the query. You can then either Cancel the Query request using the **Back** button or **Save** the change.

Once saved, the next application in your assigned list will be displayed ready for processing.

**Note:** If no further applications are allocated to you then a message will be displayed and you will be returned to the Graduate Admissions menu.

In the Assigned applications window the display will show that the Assigned Processor has added a query to an application.

Select the **Queried (1)** link which allows you to process the application once the query has been investigated. By selecting the Process link leads to the Process Individual Applications functionality.
3.3.6 Calculated Submission Date

Calculated Submission Date is the final UK date on which the graduate application is considered to be submitted. Initially it is the same as the Original Application Submitted date (i.e. the date when the applicant submitted the on-line application form) this is then updated when mandatory supporting document are submitted and uploaded or removed by GAF. The calculated submission date can be changed by the functionality when a document is uploaded or removed, or if you amend the date specifically as outlined in Amend Submission Date.

These are GAF criteria for the calculation performed by the functionality:

1) Documents relating to mandatory clearance checks only affect the calculated submitted date.
2) For documents uploaded by GAF, document received date is used for calculations, not the date when the document record was created in SITS:Vision
3) Original application submission date is used as the submission date for the documents uploaded by the applicant when submitting the application.
4) When there are multiple documents of a same type, the system must check all received dates for all valid mandatory documents of the same type, and use the earliest received date.
5) GAF will accept references regardless of whether they are Reference 1, 2, 3, 4, 5 or 6 and in which order they arrived. For example, when the minimum of 2 references is needed to complete the application, GAF accept any 2 that arrive, regardless of whether they come from referee 1, 2 or 3 etc, and in which order. Therefore any combination of 2 references received should pass the references clearance checks, where 2 references are required.

3.3.7 Amend Submission Date

Select the Amend Submission Date link which allows you to amend the calculated submission date (see 3.3.6), and in that way override the date on which the application has been submitted.

Note: This Calculated Submission Date will be overwritten when further Mandatory documents are added so GAF have the opportunity to Amend the Submission Date to the previous stated Date.

3.3.8 Uploading Supporting Material

New items of supporting materials can be uploaded to the application, select the Upload Document link.

Select the document type, and set the date on which the document was received (defaulting to the system date).

1) Select the document type then proceed to the next screen where you can browse to the relevant file and upload the item. A notes field can be completed if required, e.g. to capture the document submission date.
Note: If the Document Type is not selected, an error will be displayed.

Uploaded date will be set to today's date by default.

Note: If there is an outstanding clearance check linked to the document being uploaded (e.g. if the holding doc is not there). GAF can use Set to Submitted (see 3.3.12.1) to indicate that the clearance check has been passed with the receipt of this document.

if the upload of this document would affect the calculated submission date, GAF will overwrite it in Amend Submission Date (see 5)).

Upload the document first and then modify the Calculated Submission Date if need be.
2) Once complete select **Upload a Document**

File Upload Screen
Use this Page to upload documents

<table>
<thead>
<tr>
<th>Add file here</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
</tr>
<tr>
<td>Browse...</td>
</tr>
</tbody>
</table>

3) Search for the required document by selecting **Browse...**

Choose File to Upload

4) Choose the required file and select **Open**

File Upload

<table>
<thead>
<tr>
<th>Add file here</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
</tr>
<tr>
<td>\CON-USERSVR06\For</td>
</tr>
</tbody>
</table>

5) Add any notes and then select **Upload file**
3.3.9 Remove Failed Supporting Materials

Existing items of supporting materials can be removed from the application completeness calculation.

You will be able to select the supporting document to be removed by selecting the **Remove** link displayed against the document.

![Supporting Documents Table]

A screen requesting confirmation will be displayed containing details about the document:

![Confirm Document Removal Screen]

Select the **Return** button which will abort the update and return to the previous screen.

Select the **Confirm** which will proceed with the update and display a confirmation that the document has been removed.

![Document Removed Table]

Select the **Return** button which will enable you to go directly to the Review Application screen, where the Supporting Documents table will be updated. The removed document will not be there, because it has been marked out of use. The failed document will still be visible via SITS:Vision Client, and in the merged pdfs of the application and the supporting documents.
3.3.10 References / Referees

Select the Referees link will display a list of the referees stated on the original application.

<table>
<thead>
<tr>
<th>Referee</th>
<th>Name</th>
<th>Email</th>
<th>Reference Type</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mr Simon Jones</td>
<td><a href="mailto:a@a.com">a@a.com</a></td>
<td>Professional</td>
<td>Ref1 Org</td>
</tr>
<tr>
<td>2</td>
<td>Dr John Davis</td>
<td><a href="mailto:b@a.com">b@a.com</a></td>
<td>Academic</td>
<td>Ref2 Org</td>
</tr>
<tr>
<td>3</td>
<td>Mr Dave Dimbleby</td>
<td><a href="mailto:c@a.com">c@a.com</a></td>
<td>Professional</td>
<td>Ref3 Org</td>
</tr>
</tbody>
</table>

Note: In Quick Application Processing none of the fields are editable

3.3.11 Reconciling Mandatory Clearance Checks for References

GAF will accept references regardless of whether they are Reference 1, 2, 3, 4, 5 or 6 and in which order they arrived. For example, when a minimum of 2 references are needed to complete the application, GAF accept any 2 that arrive, regardless of whether they come from referee 1, 2 or 3 and in which order. Therefore any combination of 2 references received should pass the references clearance checks, where 2 references are required. Quick Application Processing and Process Individual Applications functionalities are built in such a way that the functionality performs this reconciliation.

3.3.12 Clearance Checks

A Clearance check represents course requirements for supporting documents, i.e. what supporting documents are required for the application for a certain course to be complete.

When reviewing documents, you are making sure that all submitted supporting documentation is exactly what it states it is i.e. a CV actually is a CV, and all relevant requirements are fulfilled.

It will be possible for you to update the status of certain clearance checks as required.

Note: After the application has been processed, the applicant will receive an email detailing which mandatory items are missing or failed and need to be submitted or re-supplied, dependent upon the status of the clearance checks.

You can click/select the check box to select a clearance check to update and click/select the check box a second time to deselect a clearance check.

Clearance checks with the status of Pending have been supplied and are assumed to be valid unless you have already updated them to be Failed.

3.3.12.1 Set to Submitted

A list of mandatory clearance checks where supporting materials have not been supplied, will be displayed so that you can mark them as ‘Submitted’ if the materials are found to be present within other documents. For example, Written 1 contains both Written 1 and Written 2 documents; therefore, Written 2 clearance check can be updated to show it has been supplied.

Tick one or more items and select the Set to Submitted link which will change the status of those clearance checks to indicate that the supporting document has been submitted.
3.3.12.2  *Fail mandatory clearance checks*

A list of mandatory clearance checks where an item of supporting material has been supplied and is attached to the application will be displayed so that you can mark them as Failed if the materials are found to be unsatisfactory, e.g. a transcript which is not an official document.

Tick one or more items and select the [Process] button which will change the status of the clearance check to Failed.

The applicant will receive an email detailing which mandatory items have failed and need to be resubmitted after the application has been processed.

**Note:** Multiple transcript document records may exist, but only one clearance check (SCC record) exists to reflect them all.

3.3.12.3  *Processing an Application*

Select the [Process] button which will invoke a task step which will assess the state of the clearance checks, including status changes just made, according to the criteria described in the section below, and then direct you to a screen for either complete or incomplete applications, where you will be able to confirm the processing, or cancel. If the you confirm, then the complete flag will be set.

3.3.13  *How the system calculates the Complete Flag*

*Complete Late*

All mandatory clearance checks have been satisfied, i.e. items of supporting material have been supplied and are attached to the application and have no clearance checks marked as Failed, BUT the last deadline for the course has already passed.

*Complete not sent*

If all mandatory clearance checks have been satisfied i.e. all items of supporting material have been supplied and are attached to the application and have no clearance checks marked.

*Incomplete Too Late*

There are mandatory clearance checks with status other than Pending or Passed i.e. an item of supporting material has not been supplied or it has been marked as Failed and the last deadline for the course has already passed.
Incomplete not sent

There are mandatory clearance checks with status other than Pending or Passed i.e. an item of supporting material has not been supplied or it has been marked as Failed.

3.3.13.1 Assessing if last deadline has passed

Calculated Submission Date is compared against the next available deadline for the course.

3.3.13.2 Incomplete Applications: Missing/Unsatisfactory Supporting Materials

For incomplete applications, a screen will be displayed showing the Applicant Information, the value of the Complete flag, and any clearance checks which are missing or failed.

Select **Save** to continue, or **Back** to return to the Process Application screen to apply further updates.

Select **Save** to set the Complete flag, and remove the applicant from your processing queue.

You will then be presented with a confirmation screen which will contain Applicant Information, the status of the complete flag, and whether the application will be included in the batch for sending emails later.
Click Next, you will then be presented with the next application in their allocated list which is ready to process. If no further applications are allocated to you, then a message will be displayed. An application must either be Processed or Queried for you to proceed to the next application.

### Completed Applications

For complete applications, a screen will be displayed showing the Applicant Information, the value of the Complete flag, the Application Deadline.

Select Save to continue, or Back to return to the Process Application screen to apply further updates.

Select Save to set the Complete flag. For Complete applications, it will also set the Application Deadline and the Complete Date, and mark the application as available in UAB processing screens.

You will then be presented with a confirmation screen which will contain Applicant Information, the status of the complete flag, and whether the application will be included in the batch for sending emails later.
Click on the confirmation screen, you will then be presented with the next application in your allocated list ready to process. If no further applications are allocated then a message will be displayed.

An application must either be Processed or Queried for you to proceed to the next application.
4. Processing Individual Applications

This eVision screen will allow authorised Users to search for graduate applications in order to review, update and/or process them. This section enables GAF to perform a variety of tasks covering the majority of the activities undertaking by GAF during the admissions cycle. Less frequent tasks will be handled via maintaining the application record via the SITS:Vision client screens.

Processing Individual Applications is accessed via the Admissions menu, from the Graduate Applications and Funding - Process Applications container and selecting the following link.

4.1 Search for Applications

Select the menu option which will display the Search for Applications screen:

![Processing Individual Applications](image)

You can enter multiple search criteria to reduce the amount of results found.

Select to return a list of search results.

If the selection criteria entered do not match with any graduate applications, then a message will be displayed, and the you will be returned to the Search for Applications screen. The previous search criteria will still be in place and can be amended.

Select the button which will remove any previously entered search criteria.
4.2 Search Results

**Processing Individual Applications**

Total Number of Records Displayed: 1

<table>
<thead>
<tr>
<th>Student Number</th>
<th>Name</th>
<th>Department</th>
<th>Programme</th>
<th>Calculated Submission Date</th>
<th>Status</th>
<th>Year of Entry</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>701695</td>
<td>Ana Appyona</td>
<td>Faculty of Philosophy (YDS)</td>
<td>BPhil Philosophy - Balliol</td>
<td>07 June 2015</td>
<td>Application active (CAP Only)</td>
<td>2015/16</td>
<td>Process this Application</td>
</tr>
</tbody>
</table>

[Return to Admissions] [Return to Search]

**Process this Application**

Select the Application link from the search results list which will retrieve details of the selected application and display it in a new screen, Application Details. You will also be able to return the Admissions page, and return to the search by using the displayed buttons.

4.3 Application Details

The screen will display details about the Application, the associated Supporting Documents and Clearance Checks. You will be able to perform a variety of tasks covering the majority of the activities performed by GAF during the admissions cycle. Less frequent tasks will be handled via maintaining the application record via the SITS:Vision client screens.
4.3.1 Application Status

Application status is displayed at the top of the screen. Any queries are also displayed here.

```
Application details

The current status of this application is Not Processed
```

4.3.2 Reviewer Information

The name of the person to whom this application has been assigned for processing is displayed, also a count of the applications assigned to them, e.g. 1 of 2 indicates that this is the first of the two applications assigned to this User.

```
This application has been assigned to Martin Robert Eley. 1 of 10.
```

4.3.3 Applicant Information

Basic information about the applicant and their application will be displayed in a table layout at the top of the page.

This is the same layout and information as shown in the Review Application screen (see 3.3.2).

4.3.4 Decision Summary

Decision Summary table shows the UAB and college decisions.

```
Decision Summary

<table>
<thead>
<tr>
<th>UAB Decision</th>
<th>College Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decision pending</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Re-evaluate</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Waitlist</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Conditional offer</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

Note: possible combinations in Decision Summary are:
```
4.3.5 Application Documents and Supporting Documents

For details, go to the appropriate sections (see 3.3.3).

See section 3.3.4.1 for details on New Supporting Documents from Applicant Self Service.

4.3.6 Amend Submission Date

Selecting this option will display the current value for the Calculated Submission Date and allow you to update the value. (See 5))

4.3.7 Upload Document

Any new or replacement documents can be uploaded via this section, (see 3.3.8). If necessary, calculated submission date is updated when documents are uploaded. (See 3.3.6).

4.3.8 Remove Document

Existing items of supporting materials can be removed from the application. This doesn’t remove the document from the system, but it marks them as invalid. If necessary, calculated submission date is updated when documents are removed. (See 3.3.6 and 3.3.9).
4.3.9 Referees

Upon clicking on the expandable table called ‘Referees’ on the Application Details screen, you will be shown the list of referees, with a clear indication of whether they are referee 1, 2 or 3. There can be up to 6 referees. You will be able to view referee details, edit the existing ones, email a reference link and add details for additional referees.

<table>
<thead>
<tr>
<th>Referee</th>
<th>Name</th>
<th>Email</th>
<th>Reference Type</th>
<th>Institution</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mr Simon Smith</td>
<td><a href="mailto:s@ja.com">s@ja.com</a></td>
<td>Professional</td>
<td>Ret1 Org</td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>Dr John Danna</td>
<td><a href="mailto:b@ja.com">b@ja.com</a></td>
<td>Academic</td>
<td>Ret2 Org</td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>Mr Johnnie Dumbley</td>
<td><a href="mailto:c@ja.com">c@ja.com</a></td>
<td>Professional</td>
<td>Ret3 Org</td>
<td>Edit</td>
</tr>
</tbody>
</table>

### 4.3.9.1 Add Referee

Click on the [Add Referee] button which leads to a new screen ‘Add New Referee’, where you will be able to record the details of a new referee. 6 is the maximum number of referees allowed on the system.

The return by date defaults to the date provided by the Applicant.
• **Reference Type** – Drop Down list stating Academic or Professional.
• **Title** – Drop Down list of available titles
• **Given Name**
• **Family Name**
• **Institution**
• **Role**
• **Email**
• **Postcode**
• **Address – Line 1**
• **Address – Line 2**
• **Address – Line 3**
• **City**
• **State/Province**
• **Country**

Select the [Back] button to take you to the previous page. The [Save] button creates a record for the new referee, and the student clearance check for that corresponding referee if they don’t exist. An email will be sent to the referee with a link to be able to add the reference directly onto the application should [Yes] [No] be selected.

4.3.9.2 *Edit Referee Details*

Click the [Edit] button which leads to a new screen ‘Edit Referee Details’.
Processing Individual Applications

4.3.9.3 Confirmation of Referee Changes and Email

After clicking on Save on either Add New Referee or Edit Referee Details, you will see the below confirmation screen, with an indication of whether an email was sent to the referee or not.
After clicking Confirm on ‘Confirm Email to Referee’, you can see the below confirmation screen.

### 4.3.10 Reconciling mandatory clearance checks for references

Mandatory clearance checks for references should be reconciled by the system when appropriate (see 3.3.11).

### 4.3.11 Calculated Submission Date

Calculated Submission Date is the final UK date on which the graduate application is considered to be submitted, and it is used for placing an application within a gathered field. This date is updated based on when the last piece of supporting material was submitted by the student, and uploaded by GAF via eVision. The calculated submission date can be changed when a document is uploaded (see 3.3.8), removed (see 3.3.9), or if you amend the date specifically as per Amend Submission Date (see 5)).

### 4.3.12 Clearance Checks (see also 3.3.12)

It will be possible for you to update the status of certain clearance checks as required.

Click or select the relevant check box to select a clearance check to update, and click or select the check box a second time to deselect a clearance check.

The clearance check updates are grouped by 3 types of action:

#### 4.3.12.1 Set to Submitted – (See 3.3.12.1).

Once the appropriate clearance check is selected, press `Set to Submitted` and the item will be removed from the list of material still required.
4.3.12.2 Fail Mandatory Clearance Checks – (See 3.3.12.2).

4.3.12.3 Make Mandatory

Make Mandatory

Select the link which will display a list of non-mandatory clearance checks for which supporting materials have not yet been supplied.

Tick one or more items and select the link which will mark them as mandatory so that they will be chased as missing items. The system then removes the waiver by deleting the content of the Waiver field for this clearance check.

This option will most likely be used to reverse a waiver, or correct an issue where a supporting material was not part of the mandatory set at the point of submitting the application.

4.3.13 Issuing a barcode for document scanning

Documents that have arrived in paper copy are scanned and attached to the applicant’s record in SITS:Vision via the Infonic interface.

To create a barcode select the link. You will be able to select the document type, and set the date on which the document was received (defaulting to system date).

1) Select the document type
Note: If the Document Type is not selected, an error will be displayed.

2) Uploaded date will be set to today’s date by default but can be modified.

3) To produce a barcode select the [Barcode] button and a barcode label will be produced on the appropriate printer and a confirmation screen will be displayed.

4) You can then place the barcode on the paper copy before the document is scanned. The barcode will link the scanned document to the appropriate record in SITS:Vision.

5) The document is scanned and automatically uploaded against the application by batch every 15 minutes. This will appear in the supporting documents list.
At the time of the barcode creation, a record will be created with the document type selected by yourself. In this way, it will be possible for the document to count towards the application completion (see 3.3.13.3) and the calculated submission date updated (see 3.3.6) when the barcode has been issued and before the scanned documents are uploaded into SITS:Vision.

The Button (see 3.3.8) can be used for electronic documents and the button for hard copy documents received in the post.

4.3.14 Email UAB when a document is added to complete an application

If the applications status is complete when an additional item of supporting material is uploaded, an email to the relevant UAB main contact will be sent by the system details of the document. The email will be sent immediately after the document is uploaded, which means one email will be sent per document per application.

If no entry exists for the department code, then a message is displayed to the GAF User so that they know an email will not be sent automatically:

An example of the outputted email is shown below:

From: Graduate Admissions and Funding (graduate.admissions@admin.ox.ac.uk)
To: UAB Administrator
Subject: PG Admissions: Document Added to Complete Application

Dear [UAB Administrator – name of main contact],

The following complete graduate application now has additional supporting materials:

<table>
<thead>
<tr>
<th>Student Number</th>
<th>Applicant Name</th>
<th>Award Programme</th>
<th>New Documents</th>
<th>Application Complete Date</th>
<th>UAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>777770</td>
<td>Smith, Mary</td>
<td>TS_MV1_CAM - MSt Medieval History</td>
<td>CV – 10/Jan/2015 Transcript – 10/Jan/2015</td>
<td>05/Jan/2015</td>
<td>History</td>
</tr>
</tbody>
</table>

Best wishes,

Graduate Admissions & Funding
4.3.15 Waiver

Select the **Waiver** link which will display a list of mandatory clearance checks where supporting documents have not yet been supplied, and Failed (so that they can be waived if necessary). Ticking one or more items and selecting **Waiver** will update the record being waived as follows:

- change their status to Not Mandatory so that they will not be chased as missing items.
- The system date will be updated.

NB: UABs will be able to see if a document is Waived.

4.3.16 Complete Flag

Select the **Process** button to invoke a task step which will assess (or re-assess) the state of the clearance checks, including status changes just made, and set the Complete flag of the application (see 3.3.13.3).

Following the selection of the **Save** button you will then be able to choose to return to the Search results list **Return to List** or the Search screen to start a new search when the **Return to Search** button is used.
4.4 Task Selection

The Task Selection button will display a list of tasks commonly undertaken when processing applications. Less frequent tasks will be handled by maintaining the application record via the SITS:Vision client record.

Hover over the Task Selection button to show the full list.

- College Change
- College Hold - Add
- Course Change
- Entry Change
- Manage Payment Status
- Manage Tests
- Other Applications (0)
- Payment Receipt
- Personal Details
- View Audit Trail (0)
- Withdraw
- Year of Course Change

4.4.1 College Change

Each year a number of requests are received from candidates who wish to change college. There are only two valid reasons for candidates with a college place to be moved to another college and these are:

1) Funding reasons, where another college is able to offer better funding than any funding offered by the first college or there is a linked award to a specific college.

2) A medical condition or disability that the applicant believes will make the offer from their current college unsuitable. In the first instance, the applicant should contact the college with her/his request. The college should then liaise with the Disability Advisory Service (DAS) and consider whether there are any reasonable adjustments.
that could be made in order for the candidate to take up the college place successfully. If this is not the case, DAS will liaise with GAF who will facilitate the process of securing a place at a more suitable college.

Should the already selected college need to be modified then select College Change from the Task Selection list. A drop down list of all available colleges for this course/college combinations, including NAL (not allocated, Open College) and NOC (Non Matriculated) will be displayed.

1) Select the appropriate college.

Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen (see 3.3.2).

Once the required college is selected you can proceed with the change by selecting **Save** or cancel the change by selecting **Return to Task Selection**.

Selecting a course/college combination that is not currently ‘open’ will cause a warning message to be displayed.
Proceed with the change by selecting **Confirm**, or you can go **Back** and either select another college or Cancel the change completely.

Alternatively, if the college combination selected is available, you will be asked to confirm your choice: “Confirm if you wish to proceed with this college change.”

Proceed with the change by selecting **Confirm**, or you can select **Back** to make modifications.

Once the change has been committed to the database, a confirmation message will be displayed.
4.4.2 College Hold- Add/Remove

4.4.2.1 Add a College Hold

Where an application is active, not already placed on hold and is for a programme with a college association then the option to add a college hold will appear under the Task Selection.
An option will appear to add a reason for the hold in the Notes field.

Then choose **Next** and then **Save** on the following screen. The confirmation screen then appears.

Choose **Return to Task Selection** to see the change to the application.

---

### 4.4.2.2 Remove a College Hold

Where an application is active, already placed on hold and is for a programme with a college association then the option to remove a college hold will appear under the Task Selection.

---

**Note:** The College History states that the application is placed on college hold.
The New College Allocation Status dropdown field needs to be completed (mandatory field). The options are:

- Assigned to College
- Clearing House
- College Reject
- GOCAT Assigned
- Open College Application
- To be assigned by UAB

An option will appear to add a comment in the Notes field.

![College History Table]

- **College History**

<table>
<thead>
<tr>
<th>College</th>
<th>Allocation Type / College</th>
<th>Date Processed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merton College</td>
<td>Hold College Assignment</td>
<td>10 November 2016</td>
</tr>
</tbody>
</table>

![College Summary Table]

- **College Summary**

<table>
<thead>
<tr>
<th>Current College</th>
<th>Merton College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current College Allocation Status</td>
<td>On Hold</td>
</tr>
<tr>
<td>New College Allocation Status</td>
<td>Assigned to College</td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
</tbody>
</table>

 ![Return to Task Selection Button]

**Note:** Usually the ‘New College Allocation Status’ would be reverted to the previous status (e.g. Assigned to College). To assign a different college, see Section 4.4.1 College Change.

Then choose **Next** and then **Save** on the following screen. The confirmation screen then appears.

![College Summary Table]

- **College Summary**

<table>
<thead>
<tr>
<th>Current College</th>
<th>Merton College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current College Allocation Status</td>
<td>Assigned</td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
</tbody>
</table>

![Return to Task Selection Button]

**Note:** The Current College Allocation Status will change to the option chosen from the New Allocation Status dropdown.

Then choose **Return to Task Selection** to see the change to the application.
4.4.3 Course Change

Should the applicant decide to modify the Course that they would like to take then GAF can select Course Change from the Task Selection List that will display a searchable list of all available courses. NAL (not allocated, Open College) and NOC (Non Matriculated) versions of the course are displayed so that the course can be changed independently of the college which is currently on the application, i.e. regardless of whether the college on the current application offers it.

1) Enter a keyword and all the relevant courses will be displayed using a dynamic search.
A confirmation screen will be displayed once you have selected **Save**, or you can select the **Back** button should you wish to change the Course required or cancel the change completely.

Should you select a course that is not currently ‘open’ will cause a warning message to be displayed. A course is open if its related IPP record in-use flag is set on for either the NAL or NOC college occurrence. NAL (not allocated, Open College) and NOC (Non Matriculated).

Select **Confirm** should permission have been granted for the Applicant to be rerouted to this course, or you can select **Back** and modify the course selected.

Alternatively, if the course selected is available then you will be able to confirm their new course choice.

You will be asked to **Confirm**, or you can go **Back** and modify the course.

You can change the college selected should this be necessary by choosing the appropriate college from the drop down list of colleges, including NAL (not allocated, Open College) and NOC (Non Matriculated), where you will need to select the college associated with the course. The current college is displayed as a prompt.
Proceed with the change by selecting **Confirm**, or you can select **Back** and modify the specified college or cancel the change altogether.

Selecting a course that is not currently ‘open’ will cause a warning message to be displayed.
Proceed with the change by selecting **Confirm** should permission have been granted for the Applicant to be rerouted to this course and college combination, or they can select **Back** and modify the college.

Alternatively, if the course selected is Open, you will be asked to confirm your choice.

**NB:** The college and UAB offers are not being changed at this point because is assumed that 90% of the re-routes will occur before an offer is made. If the offer does need to be changed, this can be done by following the procedures for undoing an offer.

### 4.4.4 Entry Change
Clicking on Entry Change in the Task Selection list allows you to change the Term, the Year of Entry, or both for this application. The GAF User will know what term/year the change needs to be made for, and they'll be able to do it in this screen regardless of whether for example the change is deferral to a future year, or change of term to allow a student to start earlier than what they've originally applied for. The reason for change is also recorded.

The Term is validated based on the terms available in the current admissions year, but the year is not. Course Block Occurrence records are not created in advance of the current academic year. It is assumed that the existing valid entry points will be true in future years without the need to validate them as such.

<table>
<thead>
<tr>
<th>Applicant Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
</tr>
<tr>
<td>Miss Mary Teal</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programme</th>
<th>UAB</th>
<th>College</th>
<th>Start term</th>
<th>Original Submission Date</th>
<th>Fee Status</th>
<th>Application Type</th>
<th>Requested Re-Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>RD_AN2_BNC - DPhil Anthropology</td>
<td>Soc &amp; Cul Anth</td>
<td>Brasenose College</td>
<td>Michaelmas</td>
<td>05 August 2015</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the change of entry you wish to make. Note: the terms listed are based on the terms available in the current admissions year. Fields marked with * are mandatory.

<table>
<thead>
<tr>
<th>Term of Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Term</td>
</tr>
<tr>
<td>Change Required*</td>
</tr>
<tr>
<td>New Term of Entry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year of Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Year</td>
</tr>
<tr>
<td>Change Required*</td>
</tr>
<tr>
<td>New Year of Entry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reason for Change of Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason for Change *</td>
</tr>
</tbody>
</table>

Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

4.4.4.1 Term of Entry

- **Current Term** – The Term selected on Initial Application.
- **Change Required** – A Mandatory field using Radio Buttons for Yes and No options.
- **New Term of Entry** – A drop down list showing the available Terms that can be selected.
### 4.4.4.2 Year of Entry

- **Current Year** – The Year or Entry from the application record.
- **Change Required** – A mandatory field using Radio Buttons for Yes and No options.
- **New Year of Entry** – Drop down list of academic years ranging from -1 and +3 for the year Current Admissions Year

### 4.4.4.3 Reason for Change

- Drop down list containing the values Deferrel, Early Start, Late Start and Other
- A note can be entered to add a longer explanation or a reason should “Other” have been selected.
Processing Individual Applications

Return to Task Selection takes you back to the Application Details screen.

Upon clicking Save, you will be asked to confirm your selection.

Upon clicking Confirm, the system will perform a validation if the proposed new academic year is earlier than the current admissions year recorded, or they can select Back and modify the details.
Once the change is recorded in the database, you will be shown the following confirmation.

Once the change is recorded in the database, you will be shown the following confirmation.

## Entry Change Confirmation

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
<td>Student Number</td>
</tr>
<tr>
<td>Miss Mary Teal</td>
<td>701787</td>
</tr>
<tr>
<td>Programme</td>
<td>UAB</td>
</tr>
<tr>
<td>TM_INI_KEL - MSc Social Science of the Internet</td>
<td>Internet Inst</td>
</tr>
</tbody>
</table>

Confirm that you wish to make the following change of entry.

### Term of Entry

<table>
<thead>
<tr>
<th>Current Term</th>
<th>Michaelmas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Required*</td>
<td>No</td>
</tr>
<tr>
<td>New Term of Entry</td>
<td>-</td>
</tr>
</tbody>
</table>

### Year of Entry

<table>
<thead>
<tr>
<th>Current Year</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Required*</td>
<td>Yes</td>
</tr>
<tr>
<td>New Year of Entry</td>
<td>2016/17</td>
</tr>
</tbody>
</table>

### Reason for Change of Entry

<table>
<thead>
<tr>
<th>Reason for Change</th>
<th>Deferral</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note</td>
<td>-</td>
</tr>
</tbody>
</table>

Once the change is recorded in the database, you will be shown the following confirmation.

## Entry Change Complete

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
<td>Student Number</td>
</tr>
<tr>
<td>Miss Mary Teal</td>
<td>701787</td>
</tr>
<tr>
<td>Programme</td>
<td>UAB</td>
</tr>
<tr>
<td>TM_INI_KEL - MSc Social Science of the Internet</td>
<td>Internet Inst</td>
</tr>
</tbody>
</table>

The change of entry for this application has been made:

### Term of Entry

<table>
<thead>
<tr>
<th>Current Term</th>
<th>Michaelmas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change made</td>
<td>No</td>
</tr>
</tbody>
</table>

### Year of Entry

<table>
<thead>
<tr>
<th>Current Year</th>
<th>2016/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change made</td>
<td>Yes</td>
</tr>
</tbody>
</table>

[Return to Task Selection]
4.4.5 Manage Payment Status

Selecting Manage Payment Status will display details of the payment status clearance check for this application.

You can amend the status of the Clearance Check to be Failed or Passed, set the date when the record was updated, and enter notes against the clearance check to capture the reason.

Where relevant, GAF will email UABs off system, because it happens infrequently. Where necessary, GAF will manually make other application changes, depending on the stage of the application.
Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

- **Current Payment Status** – Mandatory drop down field displaying passed or Failed.
- **Date Updated** – Mandatory field stated the date that the Payment status was changed.
- **Note** - A note can be entered to specify reasons for the change.

Proceed with the change by selecting **Save** or go back to the previous page.

After selecting **Save**, you will be asked to confirm the change and be presented with the current and the new data.
Processing Individual Applications

Confirm you wish to change the following payment status change.

**Current Payment Status**
- **Current Payment Status:** Passed Check
- **Date Updated**:* 08/Aug/2015
- **Notes:** Paid today.

**New Payment Status**
- **New Payment Status:** Failed Check
- **Date Updated**:* 03/Sep/2015
- **Notes:** Applicant re-used payment code.

Proceed with the change by selecting **Confirm** or select **Back** and the payment status value will revert back to the old value.

The following confirmation message is displayed.

**Payment Status Changed**

You have made the following payment status change.

**Current Payment Status**
- **Current Payment Status:** Failed Check
- **Date Updated**:* 03 Sep 2015
- **Notes:** Applicant re-used payment code.

Go back to the main application page by selecting **Return to Task Selection**.
4.4.6 Other Applications

Selecting Other Applications will display basic information about all other applications submitted for this applicant (including migrated applications) and their associated documents, where the applications have the same student number.
Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

You can select View to open a selected document in the appropriate application, e.g. Acrobat Reader, in order to review, print or save the document for re-use as required.

When they have finished, select **Return to Task Selection**.

### 4.4.7 Personal details

Selecting Personal details will display current details for the applicant’s Home and Correspondence addresses and contact details.

Select **Change** to enable an edit screen or **Return to Task Selection** to cancel out of this task without making any changes.

Selecting **Change** will display the current address details in an Edit Address screen.
Enter a postcode and then select [Get Address] to retrieve the full postcode address. Alternatively you can enter or amend the address details directly.

NB: The [Get Address] function works for most UK addresses, and some North American and European countries.

The appropriate Address can be highlighted and [Select] pressed.
Selecting the **Save** button will cause the student Address record to be updated with the entered address. A record of the previous address will be automatically saved.

When they have finished, select the **Return to Task Selection** button.
4.4.8 Payment Receipt

Selecting Payment Receipt will generate a VAT receipt for the applicant in pdf format which you can then request is sent by email to the applicant. The pdf/email includes the date, reference (Applicant id) and text:

![Create Receipt](image)

On clicking **Create Receipt**, the screen below will be displayed asking you to either email the applicant or return to task selection.

![Email Receipt to Applicant](image)

On selecting **Send Email**, you will be displayed a message confirming the receipt was sent to the applicant.

![Receipt Sent](image)
An example of a PDF generated is:

![University of Oxford document](image)

When they have finished, select **Return to Task Selection**.

The document created will be listed in Supporting Documents.

### 4.4.9 Manage Tests

Selecting Manage Tests will display details of the admission and language tests provided by the applicant. You can amend Results or add new entries as required.
Selecting **Return to Task Selection** will abandon the changes and return you to the Application screen.

Selecting **Add New** enables you to add new results to the application if they have been received.
Once a selection is made a confirmation screen is displayed.

Selecting will cause a record to be created with the test values entered or to cancel the modification.

GRE is made up of 3 test types and each one has a score and a percent. So in total there could be up to 6 records:
- Verbal percent and score, analytical percent and score and quantitative percent and score.

IELTS is made up of 4 test types and an overall score. So in total there could be up to 5 records:
- Overall score, reading, speaking, listening and writing.

TOEFL is made up of 4 test types and an overall score. So in total there could be up to 5 records:
- Total score, reading, speaking, listening and writing.

Cambridge test details are held in just one record and so are Cambridge Proficiency test details.

In order to Amend an individual test record select the button in the table row. A new screen will open where the following fields are editable.
Select [Next] to have the opportunity to confirm the changes or [Back] to cancel the modification.

The following information will be stored against the application record. Please check and confirm whether this is correct.

**Test Details**
- Type of Test: GRE
- Date of Test: 01/Jan/2015
- Verbal %: 69
- Verbal Score: 150
- Analytical %: 56
- Analytical Score: 5
- Quantitative %: 68
- Quantitative Score: 154

The following information will be stored against the application record. Please check and confirm whether this is correct.

**Test Details**
- Type of Test: TOEFL
- Date of Test: 01/Jul/2015
- Total Score: 50
- Reading: 27
- Speaking: 28
- Listening: 25
- Writing: 26

The following information will be stored against the application record. Please check and confirm whether this is correct.

**Test Details**
- Type of Test: Cambridge Certificate in Proficiency in English
- Date of Test: 01/Jan/2015
- Score: B
Selecting **Edit Details** will allow you to modify other results or **Save** stores the changes.

In order to add an individual test record select the Add button at the bottom of the screen.

A new screen will open where the following fields are editable;

If a record already exists for this student and Application sequence then an error message will be displayed.

Selecting **Return to Task Selection** will abandon the changes and return you to the Application Details screen.

Selecting **Save** will cause a record to be created with the test values entered.

### 4.4.10 View Audit Trail

Selecting Audit Details will retrieve a history of all changes recorded to any of the following: Course (including college), Offer, Year, Month, Attendance mode, Point of entry (Term).
Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

Task Audit records the changes made using the Task Selection button.

System Audit records the changes made to any of the out of the box functionality in SITS.

A record is created by the system in the log table every time one of the following key fields are changed.

<table>
<thead>
<tr>
<th>Field change</th>
<th>Shown</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change of CAP status</td>
<td>Y</td>
<td>Changes when application is withdrawn.</td>
</tr>
<tr>
<td>Change of qualification status (QST)</td>
<td>Y</td>
<td>Changes when application is assigned to a UAB, as the decision status changes, and when withdraw.</td>
</tr>
<tr>
<td>Change of course</td>
<td>Y</td>
<td>Changes in Course Change.</td>
</tr>
<tr>
<td>Change of year of entry</td>
<td>Y</td>
<td>Changes in Entry Change.</td>
</tr>
<tr>
<td>Decisions at stage 1, 2 or 3</td>
<td>Y</td>
<td>Changes with the decision status.</td>
</tr>
<tr>
<td>Responses at stage 1, 2 or 3</td>
<td>Y</td>
<td>Changes as UABs and colleges record responses.</td>
</tr>
<tr>
<td>Accept status</td>
<td>Y</td>
<td>Used for storing Application Completion information.</td>
</tr>
</tbody>
</table>
4.4.11 Withdraw

Selecting Withdraw Application will display a screen where you can select from a drop down list of available reasons for withdrawal and record a withdrawal date.

Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

Information about the application’s decision status is also displayed in the Decision Summary table.

Select the reason why the candidate has been withdrawn and enter the date that the Withdrawal should take place.

Selecting will abandon the changes and return you to the Application Details screen.
Withdrawing Applications

Selecting **Save** will display a message asking you to confirm their selection.

Selecting **Back** will return to the previous screen without saving the change, and with the original answers displayed.

Selecting **Confirm** will store the answers in the database, email the UAB and/or college where relevant, and display the confirmation message.

### 4.4.11.1 Withdrawn email to UAB and College

If an application is complete an email to the relevant UAB and College main contacts will be sent with details of the withdrawal where relevant and if the email address exists. The email will be sent immediately.

**From:** Graduate Admissions and Funding (graduate.admissions@admin.ox.ac.uk)

**To:** Main Contact Email for College / Main Contact Email for UAB

**Subject:** Notification of applicant withdrawal (surname, initials - award programme

The following withdrawal has been processed and can no longer be edited:

<table>
<thead>
<tr>
<th>Student Number</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Award Programme</td>
<td></td>
</tr>
<tr>
<td>UAB</td>
<td></td>
</tr>
<tr>
<td>College</td>
<td></td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td></td>
</tr>
<tr>
<td>Withdrawal Reason</td>
<td></td>
</tr>
</tbody>
</table>

The confirmation message will confirm that the application record has been updated, and indicate whether an email has been sent to UAB and/or the college.
Withdrawal Complete

<table>
<thead>
<tr>
<th>Applicant Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
<td>Ms Ana Applyone</td>
</tr>
<tr>
<td>Student Number</td>
<td>701695</td>
</tr>
<tr>
<td>Date of birth</td>
<td>02/Jan/1992</td>
</tr>
<tr>
<td>Sex</td>
<td>Female</td>
</tr>
<tr>
<td>Calculated Submission date</td>
<td>19 June 2015</td>
</tr>
<tr>
<td>Year of entry</td>
<td>2015/16</td>
</tr>
<tr>
<td>Mode of attendance</td>
<td>Full-time</td>
</tr>
<tr>
<td>Application Status</td>
<td>Application active (CAP Only)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programme</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UAB</td>
<td>College</td>
</tr>
<tr>
<td>Start term</td>
<td>Lai Dep - Mpis</td>
</tr>
<tr>
<td>Original Submission Date</td>
<td>03 June 2015</td>
</tr>
</tbody>
</table>

Warning: The system was unable to email the relevant college administrator. Check contact data.

Withdrawal Details

<table>
<thead>
<tr>
<th>Withdrawal Reason</th>
<th>Withdrawn Medical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withdrawal Date*</td>
<td>28/Jul/2015</td>
</tr>
</tbody>
</table>

Note

4.4.12 Year of Course Change

Selecting Year of Course Change will allow you to change the year of study to which the applicant is being admitted, e.g. when a research student is transferring from another institution and is entitled to begin their studies in Year 2. Note: UAB/Department Administrators will be able to make this change via the UAB Decision Making eVision screens; the option is replicated here for GAF to perform on behalf of a department if required.
Basic information about the applicant and their application will be displayed in a table layout at the top of the page. This is the same layout and information as shown in the Review Application screen defined in 3.3.2.

You will be able to pick one of the available options from the drop down and Select. A confirmation screen will display the proposed change. Selecting Back will abandon the changes and return you to the Application screen. Selecting Confirm will update the record.
4.5 Applications Queried

The eVision screen will allow authorised Users to access the graduate applications that they have previously placed in Query status.

Select the Assign Applications link and access the Assign Applications for Processing screen.

Select the Queried (7) link against your name and this will display the following.

Select Process which allows you to Complete the Application as the Query has been rectified.

4.6 Applicant Communications

4.6.1 Complete Application

There will be a daily scheduled batch email to all applicants with active applications that have been processed and assessed as Complete.

Email will be sent to the applicants to the correspondence email address.
From: Graduate Admissions and Funding (graduate.admissions@admin.ox.ac.uk)
To: Applicants correspondence email address
Subject: University of Oxford graduate admissions – application ready for assessment

Your applicant number: 701786

Dear Molly

Thank you for your application to study for the Bphil in Philosophy.

We can confirm that your application is now ready for assessment and will be considered by the academic department as part of the admissions timetable.

You can expect to hear the outcome of your application by email directly from the department within 8 to 10 weeks following the application deadline, as per the admissions timetable.

For further information about the next stages of the admissions process, please see the section of the ‘After you apply’ section of the Graduate Admissions website.

Application decisions can only be communicated by the relevant academic department. As online tracking for graduate applications is not available, if you require urgent information on the decision of your application, we recommend contacting the relevant department after the application deadline.

A full list of departments and their contact details can be found on the relevant course page.

Yours sincerely,

Graduate Admissions
University of Oxford | Graduate Admissions and Funding
University Offices, Wellington Square, Oxford, OX1 2JD

Enquiries and questions: www.graduate.ox.ac.uk/ask

4.6.2 Incomplete Application

There will be a daily scheduled batch email to all applicants with active applications that have been processed and assessed as incomplete.

Email will be sent to the applicants to the correspondence email address.

From: Graduate Admissions and Funding (graduate.admissions@admin.ox.ac.uk)
To: Applicants correspondence email address
Subject: University of Oxford graduate admissions – Incomplete application reminder

Your applicant number: 701786

Dear Molly

Thank you for your application to study for the Bphil in Philosophy.
A number of documents are required to support your application to the University of Oxford. It is your responsibility to ensure all documents required for your course, including references, are submitted before the application deadline. For further information about deadlines and the required supporting documents, please see the relevant course page on the Graduate Admissions website.

The following documents were either missing or did not meet our requirements:

[missing/unsatisfactory items]

If you have recently submitted additional documents that would address this, please note that your documents will be processed shortly and you do not need to provide them again.

If any documents were deemed unsatisfactory, the following requirements may explain why:

- Transcripts must be official (certified by the issuing institution, often with a signature and/or stamp)
- Where transcripts are not in English, you must upload both the original document and a suitably certified translation
- Other supporting documents must be in English except where specifically indicated on the course page.

Full details of our requirements are available in the Application Guide.

You may send the required documents by submitting them via our 'Upload Tool' or by sending them as an attachment in reply to this email. If any references are missing, please contact your referee(s) and remind them to submit their reference online by the deadline. References are designed to be confidential and we are unable to accept them unless they are received directly from the referee.

Provided we receive the above documents before the deadline, your application will be considered by the department.

Yours sincerely,

Graduate Admissions
University of Oxford | Graduate Admissions and Funding
University Offices, Wellington Square, Oxford, OX1 2JD
t: +44 (0)1865 270059

Enquiries and questions: www.graduate.ox.ac.uk/ask
5. Submitted Graduate Application Dataview

A Dataview has been written showing all the Submitted Graduate Applications. This can be accessed from the Dataview option from the Main Home Screen.

Select the Submitted Graduate Application Dataview link

Which will allow you to enter the necessary parameters to view the required data.
Be aware that the fields, Date of Birth, Application Submitted After, Application Submitted before, Application Completed After, Application Completed Before, New Document Uploaded After and New Document Uploaded Before contain dates that if left blank will cause the search to fail.

Once all the Parameter have been entered select **Run Report**.

The Search Parameters are displayed and then the results are displayed beneath.
Please use the scroll bar at the bottom of the results page to see the other columns.

Select the Application number link [782754-01-10] to see a tab view of the application.
5.1 Personal Details

| Personal Details | | |
|------------------|------------------|
| **Student Number** | **Applicant Name** | **Language Tests** | **Qualifications** | **UAI Decisions** | **College History, Decisions** | **Funding** | **Other Applications/Oxford Study** | **Supporting Documents** |
| 782756 | Bob Joel CIARET | | | | | | | |

<table>
<thead>
<tr>
<th>Programme</th>
<th>Date of Birth</th>
<th>Department for Continuing Education (DE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PG Dip International Wildlife Care Pro</td>
<td>03/Jan/1990</td>
<td></td>
</tr>
</tbody>
</table>

| Personal Details | | |
|------------------|------------------|
| **Title** | Dr |
| **Surname** | Joel |
| **Given Name** | Bob |
| **Middle Name** | |
| **Preferred Name** | |
| **Sex** | Male |

| Contact Details | | |
|------------------|------------------|
| **Home Address** | 41 High Street, The Millham, Blower |
| **Home Postcode** | SA60 9RH |
| **Home Country** | Zimbabwe |
| **Correspondence Address** | |
| **Correspondence Postcode** | |
| **Correspondence Country** | |
| **Date Effective From** | |
| **Date Effective To** | |
| **Email Address** | |
| **Alternative Email Address** | email@email.com |
| **Telephone Number** | |
| **Alternative Telephone Number** | |

| Nationality and Fee Status | | |
|-----------------------------|------------------|
| **Country of Birth** | Zimbabwe |
| **Nationality** | Zimbabwe |
| **Start Date of Nationality** | |
| **Do you expect to require a visa to enter the UK for study?** | No |
| **Completed Course under UK Tier 4 CHM Visa?** | |
| **Fee Status** | Overseas |

| Ordinary Residence and Leave to Remain | | |
|----------------------------------------|------------------|
| **Current Country of Ordinary Residence** | |
| **Current Country of Ordinary Residence Effective From** | |
| **I am an EU national resident in the UK for the main purpose of full-time education** | |
| **If you are not a UK or EU national but you are currently living in the UK, do you have indefinite leave to remain status? (Which has been entered on your passport?)** | |
| **Date Indefinite Leave to Remain Granted** | |

| Passport Details | | |
|------------------|------------------|
| **Passport Number** | |
| **Country of Issue** | |
| **Issue Date** | |
| **Expiry Date** | |

| Nominated Third Party | | |
|-----------------------|------------------|
| **Name** | |
| **Nominated Email** | |
| **Date of Birth** | |

| Accommodation | | |
|---------------|------------------|
| **Do you intend to apply for University Accommodation?** | |
| **Do you intend to apply for College Accommodation?** | |
| **Accompanying Adults** | |
| **Accompanying Children** | |
5.2 Application Details

5.3 Research Details

5.4 Language Tests
5.5 Qualifications

5.6 UAB Decisions

5.7 College History, Decisions
5.8 Funding

5.9 Other Applications Oxford Study

5.10 Supporting Documents

Note: New Supporting Documents from Applicant Self Service need to be ‘accepted’ before they appear on this tab. See Section 3.3.4.1.
6. Deduplication

During the import of an application, if the new applicant’s Personal ID matches the Personal ID of an existing Student (STU) then a new APF and CAP record is created and attached to the existing STU in SITS:Vision.

If there is no personal ID match then the system looks for potential matches using the following fields and rankings:

- Date of Birth,
- Gender,
- Surname,
- Previous Surname (ODBC link only),
- Forename1,
- Forename2,
- Forename3,
- Preferred name,
- Postcode,
- Email address.

A percentage threshold is defined (from 0-100). If the process doesn’t find any matching applicants above this threshold value then the applicant is processed as ‘New’.

For an example please see 5.5 Example of match calculations.

6.1 Logging into SITS:Vision

1) Open your preferred browser.

2) Enter the following URL into the address bar: https://intra.bsp.ox.ac.uk/vpn/index.html to open the Citrix login box.

3) Enter your Citrix Username and password and click on Log On.

4) A Welcome message will be displayed.
5) Click on [Click] to proceed.

6) Click on the icon labelled SITS:Vision to open the folder and display all available environments. The number of icons displayed will depend on the environments to which you have access.

7) Click on the icon labelled SITS-LIVE.

8) The login box will open. Enter your login details and click on [Ok].
9) The Menu System will be displayed. The default display will be in a Windows tree structure, but this can be changed if required.
6.2 Logging out of SITS:Vision and Citrix

6.2.1 Logging out of SITS:Vision

There are 4 ways of logging out of SITS:Vision.

1) The Close icon.
   a) Either click on the Close icon at the top of the main window, or at the top of the SITS:Vision Menu System window.
   b) One of the following confirmation boxes will be displayed. The text will depend on which Close icon you selected.
c) Click on Yes to close SITS:Vision.

2) The Options Box.

a) Enter EX in the Options box and click on Run.

b) Click on Run. Further information on the Options Box is available in Section 5.5.1.

c) SITS:Vision will close immediately without a confirmation box appearing.

3) The Menu System item

a) Ensure SITS:Vision Menu Options is selected

b) Double click on the Exit menu item

c) SITS:Vision will close immediately without a confirmation box appearing.

4) File menu item

a) Click on File and select Exit
6.2.2 Logging out of Citrix

After you have logged out of SITS:Vision you will be returned to the Citrix screen.

5) Click on to log off Citrix.

6.3 XDUP

GAF can then review possible duplicates and indicates an action via XDUP screen.

Duplicate Matching Process (XDUP) is the screen used in SITS:Vision with Advanced Duplicate Matching to review the possible duplicates identified in order to determine if the incoming applicant is correctly matched with any of the existing student records.

You can choose to view either ‘UCAS’ or ‘Direct (IPP)’ incoming applicants. UCAS covers both Undergraduate and GTTR (Graduate Teacher Training Registry) applications.
6.3.1 XDUP – IPP (Direct Applicants)

1) Select IPP from the Dropdown

2) Select <F5>
Displayed will be the details of the first Duplicate.

3) Use the data displayed to the right of the screen to check if the User is a duplicate.
At the top are the new applicant details, and below is the User already in the system or another new applicant previously received.

GAF can also use other SIT screens that they have previously used e.g. IPP, MST, ACD to investigate if this is a duplicate.

**6.3.1.1 No Match**

Should this applicants details prove not to match with an existing User then the **No Match** button can be selected. The User will then be created in SITS the same as a new User with a STU, APF and CAP record.

**6.3.1.2 Match**

Place a tick in the check box next to the existing record.

<table>
<thead>
<tr>
<th>%</th>
<th>G</th>
<th>MST Code</th>
<th>Name</th>
<th>Code</th>
<th>DOB</th>
<th>Add</th>
<th>App</th>
<th>Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>78</td>
<td>000090114365</td>
<td>MR PROVIDENCE, BENJAMIN GEORGE</td>
<td>STU:631430</td>
<td>05/Feb/1990</td>
<td>&gt;&gt;</td>
<td>&gt;&gt;</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Select the **Import** button.

A new application APF and CAP is created and attached to the existing STU.

**6.3.2 XDUP – PGCE**

1) Select UCAS from the Dropdown
2) Select <F5>

**Note:** PGCE students and UCAS students will be shown in the XDUP screen together.

3) A report can be run that will specifically list out the PGCE students.

Using the results from the F5 search and the report find an appropriate PGCE student which is a possible duplicate.

You will notice that the necessary information to aid the investigation of duplication is not displayed.

```
ID: 4000218476  
Source: UCAS  
Name: PUBICA, OLAIDE  
Gender: Female  
DOB: 04/May/1979 (36)  

WARNING: This applicant has been recorded as a possible duplicate already, as multiple DDP records exist. Please review them before merging  
```

ID: 400000024004  
Name: PUBICA, OLAIDE  
DOB: 04/May/1979 (36)  

WARNING: This applicant has been recorded as a possible duplicate already, as multiple DDP records exist. Please review them before merging  

4) Enter HIV as an acronym into SITS.

5) Select the UCAS Institution Views Folder

6) Select ivStarA – Address details folder.

7) Enter the appropriate Source ID from the XDUP record into the Person id / App id field on the address details page on HIV and select <F5>. 

---

**Deduplication**

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This should enable you to make the necessary decision.

**6.3.2.1 No Match**

Should this applicants details prove not to match with an existing User then the button can be selected. The User will then be created in SITS the same as a new User with a STU, APF and CAP record.

**6.3.2.2 Match**

Place a tick in the check box next to the existing record.

Select the button.

A new application APF and CAP is created and attached to the existing STU.

**Note:** The Data Maintenance screen (DMM) can be used to merge specific records.
6.4 Example of match calculations.

Each match field to be used is given a rank, and for each field that matches the rank is added to an overall score. Fields with no rank are not included in the match process.

<table>
<thead>
<tr>
<th>Description</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth</td>
<td>100</td>
</tr>
<tr>
<td>National Insurance Number</td>
<td>0</td>
</tr>
<tr>
<td>Gender</td>
<td>100</td>
</tr>
<tr>
<td>Surname</td>
<td>100</td>
</tr>
<tr>
<td>Previous Surname (ODBC link only)</td>
<td>0</td>
</tr>
<tr>
<td>Forename1</td>
<td>100</td>
</tr>
<tr>
<td>Forename2</td>
<td>100</td>
</tr>
<tr>
<td>Forename3</td>
<td>0</td>
</tr>
<tr>
<td>Preferred Name</td>
<td>0</td>
</tr>
<tr>
<td>Surname Soundex</td>
<td>0</td>
</tr>
<tr>
<td>Postcode</td>
<td>0</td>
</tr>
<tr>
<td>Email address</td>
<td>0</td>
</tr>
<tr>
<td>Forename1 is blank*</td>
<td>100</td>
</tr>
<tr>
<td>Forename2 is blank*</td>
<td>100</td>
</tr>
<tr>
<td>Forename3 is blank*</td>
<td></td>
</tr>
<tr>
<td>Minimum match percentage</td>
<td>60%</td>
</tr>
</tbody>
</table>

Using the rankings stated above, if the date of birth of the incoming applicant matches the date of birth of the existing record being compared against, then 100 points are given. If the gender is the same then 100 points are given. If the surname is the same 100 points are given etc.

All of the points are then added together and the % match calculated:

e.g. Date of Birth, Gender and Surname match but Forename1 and Forename2 don’t, then the calculation will be as follows;

Total Points \((100+100+100)\) 300 / total points possible 500 * 100 = 60% match

Possible matches create a Duplicate Match (DUP) record and an Updated Message (HUM).
7. **Annual Changes**

GAF undertake an annual process where programme details are circulated to departments and colleges so that they can confirm details about each course and whether it is going to be open for admissions in the next cycle.

### 7.1 XIPP

Master course records (MCR) and Course Block Occurrence (CBO) records need to be in place for the courses that are going to be active for admissions in the next academic year.

The XIPP process in SITS interrogates MCR and CBO records in order to create Published Programme (IPP) and Published Programme Occurrence (IPO) records. IPP and IPO records are used by the Graduate Admissions Application Form to control information about open courses and college offerings.

An MCR record is created for every possible course/college combination, even if a limited number of colleges will actually accept applicants for the course. A course/college combination is also created for; NAL (No College Allocated) to support open college applications or NOC (No College) to support Non matriculated courses.

1) In SITS, GAF will start by running XIPP for the next academic year.

![XIPP Populate IPP / IPO Table](image)

2) Select MCR from the Data Source Dropdown under the Programme (IPP) Options.

---

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3) Select the icon to retrieve a profile.
4) Select Admissions Entry System from the Field Dropdown

5) Enter D under the value.
6) Select the icon.
7) Select MCR-CBO from the Data Source Dropdown under the Programme Occurrence (IPO) Options.

8) Enter the appropriate Academic Year.

9) Enter a ✓ into the Use occurrence on MCR checkbox.

10) It can be run in Trial mode initially to assess the expected affect, the Trial Mode field is ticked by default.

11) Then select the Populate IPP and IPO button.
12) Select the button to run the process straight away or enter the date and time that you would like the process to run.

13) A message buffer is displayed.

Note: The process can take up to around 20 mins to complete.
14) Scroll to end of the message to ensure IPP records have only been created where expected e.g. recently created new courses. Around 21k IPO records will be created for the new academic year.

15) If all looks ok then remove the ✓ from the Trial Mode tick box.

16) Then re-select the button.

17) Then re-select the button.

### 7.2 Specific Pre-Annual changes additional runs.

More specific additional runs can be processed for example using the following settings:

- For Software Engineering (SWE)
  
  IPP Profile:  
  
  |MCR_CRSC=TM_SE5J9P1-|TM_SE5K9P1|
  
  and

  IPO Profile:  
  
  |CBO_BLOK=1-;CBO_OCCL=2H-A-|3T-A|

**Warning:** Ensure Use occurrence on MCR is not ticked. This will create additional IPO records for Hilary and Trinity terms.
18) For Said Business School (SBS)

IPP Profile:  MCR_CRSC=TA_BA9P2

and

IPO Profile:  CBO_BLOK=1·;CBO_OCCL=1M

⚠️ **Warning:** Ensure Use occurrence on MCR is not ticked. This will create additional IPO’s for Michaelmas start term, Hilary is the default start term for this course.
7.3 Annual Change Process

The Annual Change Review – Initiate Process screen will enable authorised GAF users to do four things;

1. Initiate the Annual Changes process for the Next Academic Year.
2. Set deadline dates for the next academic year.
3. Create next academic year data set based on the current years data, e.g. create Entry Requirements records for academic year 2017/18 based on records present for 2016/17 but with deadline dates defined in point 2. This data-set will be used as the basis of the annual changes review but will not affect the current admissions cycle.
4. Create status records for each college and department for the next academic year which will be used to track progress.

1) To start the Change process select the Annual Change Process link.

![Annual Change Process](image)

**Warning:** If this process has already been run the following message will appear.

```
Annual Changes

Warning: The Annual Changes Review has already been initiated for Academic Year 2017/18. Starting the process again will rebuild the Annual Changes dataset for the selected year including the UAH and College progress records. Select Continue to restart the process or Cancel.
```

All the data will be overwritten, so check before selecting the Continue button.

2) Enter the required Deadlines for the next Academic Year.

![Set deadline dates for 2017/18](image)

3) Select the Save button.
4) An opportunity to go back and make further changes is given by selecting the **Back** button or **Start Process** to begin the update.

<table>
<thead>
<tr>
<th>Annual Changes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year selected</strong></td>
<td></td>
</tr>
<tr>
<td>Current Academic year</td>
<td>2016/17</td>
</tr>
<tr>
<td>Next Academic year</td>
<td>2017/18</td>
</tr>
<tr>
<td><strong>Deadline</strong></td>
<td></td>
</tr>
<tr>
<td>November Deadline</td>
<td>18/November/2016</td>
</tr>
<tr>
<td>Early January Deadline</td>
<td>08/January/2017</td>
</tr>
<tr>
<td>Late January Deadline</td>
<td>22/January/2017</td>
</tr>
<tr>
<td>March Deadline</td>
<td>11/March/2017</td>
</tr>
<tr>
<td>Hillary term start Deadline</td>
<td>19/February/2017</td>
</tr>
<tr>
<td>Trinity term start Deadline</td>
<td>12/May/2017</td>
</tr>
<tr>
<td>Open Field</td>
<td>31/August/2017</td>
</tr>
<tr>
<td>Open Field for Med Sci</td>
<td>11/March/2017</td>
</tr>
</tbody>
</table>

5) The process can take up to about a minute to complete.

![Processing...](image)

**Processing...**

Please wait while your request is being processed.

<table>
<thead>
<tr>
<th>Annual Changes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Process started at 15:01:08.00 and finished at 15:02:05.00.</td>
<td></td>
</tr>
<tr>
<td><strong>Record count</strong></td>
<td></td>
</tr>
<tr>
<td>H1R's created</td>
<td>2100</td>
</tr>
<tr>
<td>Department status records created</td>
<td>75</td>
</tr>
<tr>
<td>College status records created</td>
<td>45</td>
</tr>
</tbody>
</table>

Appropriate checks can now be completed by GAF. E.g. the Award Programme report should be run. The report will include details about the current year and the next academic year so that it is possible to see the next academic year values have been populated correctly.

6) Select the **Award Programme Details Report** button.
Note: The default Programme Type parameter is All Postgraduates eg. PGT & PGR

7) Select [Run Report]

8) GAF can then communicate instructions via email to the UAB and College Administrators when it is appropriate for them to commence the Annual Changes review.

7.4 Annual Change Review (Monitoring)

The Annual Change Review - Monitor Progress screen will enable authorised GAF users to report on Annual Changes review statuses in order to monitor progress and chase outstanding updates from Colleges, Departments and Divisions.

2) The user will then be able to view the results, sort on columns and search for specific information or export the results to Excel for further action.

7.5 Reminder emails

During the review process GAF can initiate sending an email to specific UAB and College Admin main contacts to remind them to complete the sign-off of their data.

7.5.1 College Reminders

1) Click on a College code.

2) A new screen opens and the user will be asked to confirm they want to send a reminder to this college. They will also be able to complete a free text field to allow greater flexibility re sending email reminders. And will be able to set a deadline for completion date which will be incorporated into the email text.
3) Selecting \textbf{Review Deadline} will enable you to add a deadline stating when the review must be completed.

\begin{center}
\begin{tabular}{|c|c|}
\hline
\textbf{Deadline Date} & 21/Apr/2016 \\
\hline
\end{tabular}
\end{center}

\begin{center}
\textbf{Note:} If you need to change the deadline date please do this before setting the free text.
\end{center}

4) Selecting \textbf{Send} will send the Annual Changes reminder email to the college main contact immediately;

\begin{center}
Email has been sent to: pentest1@admin.ox.ac.uk.
\end{center}

5) Selecting \textbf{Back} will return to the College/UAB review status list.
7.6 UAB Reminders

6) Click on a UAB code to review the status of all open course for this UAB.

7) Click on a Published Programme code to send a reminder email for this programme.

8) A new screen opens and the user will be asked to confirm they want to send a reminder to this UAB. They will also be able to complete a free text field to allow greater flexibility re sending email reminders. And will be able to set a deadline for completion date which will be incorporated into the email text.
9) Selecting **Review Deadline** will enable you to add a deadline stating when the review must be completed.

10) Selecting **Send** will send the Annual Changes reminder email to the programme/UAB main contact immediately; 11) The recipient will be the main contact displayed in the grid.

12) Selecting **Back** will return to the College/UAB review status list.

### 7.7 New Admissions Cycle

At the beginning of the new admissions cycle, when all course data has been reviewed and updated in the system, the course data roll over will be initiated via the eVision ‘Annual Change Roll Over’ task. This will be run by Graduate Admissions to make the published programmes visible on the current application form. The task simply validates the contents of the future-value fields on the MCR, IPP and IPO records and if it is valid use it to update the current-value fields of that record.

This task will normally be part of a wider annual changes project which may include other changes to the graduate application form. The implementation of such a project is normally monitored by following a RIG (Release Implementation Guide). Graduate Admissions will be informed when it is time to run the Roll Over process step in eVision. This step must be run just before the new admissions cycle begins and before Student Systems Support Centre (SSSC) have updated the admissions cycle system parameter. This update task is expected to be run on the 1st September.
If the Next Academic Year value is not as expected (e.g. if it states 2018/19) then do not start the process, but instead contact SSSC and ask them to temporarily reset the system parameter before trying again.

### 7.7.1 Annual Changes Roll Over

GAF Super Users have access to the Annual Change Roll Over screen.

1) Select the **Annual Change Roll Over** link from the main Admissions screen.

    ![Annual Change Roll Over Link](image)

2) On the Annual Changes Review screen choose **Start Process**.

    ![Annual Changes Review - SSSC annual roll over](image)

3) The process will take a few minutes to run.

4) Once completed then the Award Programme Details report (see section 7.7.2) should be run to check the data has been copied to ‘This Year’ values as expected.

### 7.7.2 Award Programme Details Report

Once the Annual Changes Roll Over is complete (see section 7.7.1) then Award Programme Details report (see section 7.7.2) should be run to check the data has been copied to ‘This Year’ values as expected.

1) Select **Award Programme Details** from beneath **Annual Changes**.

    ![Annual Changes](image)

2) Use the default parameters to run the report.
3) If the process has completed successfully then the above fields should all be the same for both ‘This Year’ and ‘Next Year’. The report results can be exported to Excel to run the comparisons.

Exceptions; if ‘This Year’ equals blank and ‘Next Year’ equals N or If ‘This Year’ = N and ‘Next Year’ = * then it has also been successful.

The Award Programme Details report use hidden parameters to retrieve the correct admissions cycle data. It is expected that the step to adjust these hidden parameters will be later on in the RIG (Release Implementation Guide). Therefore, at this time the new cycles Deadlines and Supporting Materials sets will be reported under the heading ‘Next Year’ and the report will show differences between the two sets of values; This Year and Next Year for Deadlines and Supporting Materials.

Similarly, the Award Programme Details/College Combinations report will always show differences between the two sets of values; Offered This Year and Offered Next Year.

4) If the report results are as expected then Graduate Admissions should inform Student System Support Centre that the course data Roll Over process is complete and the remaining implementation tasks (RIG) can continue, specifically the admissions cycle system parameter can now be updated to the new admissions cycle value.

7.8 Course Re-opened

If a UAB requests a course is re-opened then make the following update in SITS:Vision client.

IPP

NAL or NOC occurrence of course

UDF5 – set to ‘R’
8. WPM Reconciliation Processes

8.1 WPM Daily Reconciliation

This is a **daily task** to ensure the recorded monies in SITS and WPM stay accurate. Reports are run in SITS and WPM Extranet and then compared. It may be necessary to take further action to update records in SITS, but that is expected to be a rare occurrence.

The Cashiers Office post a journal of daily funds received to Oracle AR, but they will relate to SITS transactions from 2-3 days earlier. A detailed reconciliation between the University bank account and SITS or WPM is not possible but the daily total received could be checked against an expected daily total provided to the Cashiers office from Graduate Admissions.

8.1.1 Close Batch

To prevent further editing of the batch, the batch of transactions from the previous day(s) should be closed. A new batch is automatically opened each day that there is activity. If there is no batch present for the preceding day then it would be wise to check if this is expected.

1) Open the LEB screen in SITS Client.

2) Retrieve the relevant record(s) by Status = ‘Processing’ and Programme = ‘SRS_XLGT_15’. There may be several records retrieved in that state, up to 2 for each day so on a Monday morning there could be 6 records returned.

3) Highlight each record in turn and Click the Close the Batch button.

8.1.2 Run SITS Batch Report

Next, generate a html report of the transactions for the dates to be reconciled. The output will be used to compare with the WPM transactions report.

1) From the LEB screen, retrieve the closed batch(s) for Programme SRS_XLGT_15 and the Open date(s) to be reconciled. They may already be retrieved from the previous step.

2) Produce the SITS report by selecting All>Gen and Print Letter from the menu bar.

3) Enter the Letter code ‘BATCN_REPORT’ and tab out of the field, then select Create HTML file, see screen shots below. The report will open in your default browser.
4) The report will open in your default browser.

5) Log into the WPM extranet and navigate to Reporting and select Immediate Card Payments https://extranet.wpmeducation.com/extranet/

6) Enter search criteria in Advanced Search; select the date to be reconciled in both Date From and Date To fields. Or a date range e.g. to combine Friday to Sunday in one run on a Monday morning.
7) When the results are returned use the Export.csv button to save the output to file ready for comparison.

SITS Batch Report will include all transactions; successful, failed and cancelled. Only those with an External Ref present are successful.

WPM Immediate Card Payments report will contain both successful and failed payments. Payment success shows as a green tick or a red cross.

8) Match on External Ref to Trans Ref to ensure all WPM transactions are correctly updated in SITS.

9) If a mismatch is identified between SITS and WPM then that is most likely due to a failure to write back from WPM to SITS. That should be a rare occurrence but it could happen. GAO should receive an email into Right Now informing them of any issues with the write back. It is advisable for those messages to be actioned before the daily reconciliation task starts.

10) Follow the steps in the next section to Update Ledger Transaction Records.

Reconciliation Scenarios

<table>
<thead>
<tr>
<th>SITS status (in Batch_report)</th>
<th>WPM status</th>
<th>SITS status (in LTE)</th>
<th>Reason</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Document type = GOA_WPM_RCT And External ref not blank</td>
<td>Payment success And External ref = Trans ref</td>
<td>Awaiting import</td>
<td>Payment successful and in synch with SITS</td>
<td>None required</td>
</tr>
<tr>
<td>2 Document type = GOA_WPM_RCT And External ref = blank</td>
<td>Payment success</td>
<td>On hold</td>
<td>Payment authorisation successful but write back failed</td>
<td>Update SITS transactions to ‘Awaiting import’ and set external ref. Check status of IPR record</td>
</tr>
<tr>
<td>3 Document type = GOA_WPM_RCT And External ref = blank</td>
<td>Payment failed</td>
<td>On hold</td>
<td>Payment authorisation failed but write back failed</td>
<td>Update SITS transactions to ‘Cancelled’ if required (see item 5)</td>
</tr>
<tr>
<td>4 Document type = GOA_WPM_RCT And External ref = blank</td>
<td>not found in WPM</td>
<td>On hold</td>
<td>Payment process abandoned before write back or cancelled and write back failed</td>
<td>Update SITS transactions to ‘Cancelled’ if required (see item 6)</td>
</tr>
<tr>
<td>SITS status (in Batch_report)</td>
<td>WPM status</td>
<td>SITS status (in LTE)</td>
<td>Reason</td>
<td>Action</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------</td>
<td>----------------------</td>
<td>------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5 Document type = GOA_WPM_RCT</td>
<td>Payment failed</td>
<td>Cancelled</td>
<td>Payment authorisation failed, applicant cancelled out of payment process without providing alternative card</td>
<td>None required (be careful to match on both date and time as external ref is not populated in SITS in this scenario)</td>
</tr>
<tr>
<td>And External ref = blank</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Document type = GOA_WPM_RCT</td>
<td>not found in WPM</td>
<td>Cancelled</td>
<td>Applicant cancelled out of payment process</td>
<td>None required</td>
</tr>
<tr>
<td>And External ref = blank</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Document type = GOA_WPM_RCT</td>
<td>not found in WPM</td>
<td>Awaiting import</td>
<td>Shouldn’t be possible</td>
<td>Check report parameters are correct. Search by Trans ref in WPM in case transaction time close to midnight.</td>
</tr>
<tr>
<td>And External ref not blank</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

During daily reconciliation you wouldn’t expect any transactions to have a refund amount but if that should happen then include an extra check in your actions;

<table>
<thead>
<tr>
<th>SITS status (in Batch_report)</th>
<th>WPM status</th>
<th>SITS status (in LTE)</th>
<th>Reason</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Document type = GOA_WPM_RCT</td>
<td>Payment success</td>
<td>Awaiting import</td>
<td>Payment successful and in synch with SITS</td>
<td>None required (i.e. it is in the authorised refunds file)</td>
</tr>
<tr>
<td>And External ref not blank</td>
<td>Refund amount not = 0</td>
<td></td>
<td>Transaction has been refunded (partly or fully)</td>
<td></td>
</tr>
<tr>
<td>2 Document type = GOA_WPM_RCT</td>
<td>Payment success</td>
<td>On hold</td>
<td>Payment authorisation successful but write back failed.</td>
<td>Update SITS transactions to ‘Awaiting import’ and set external ref.</td>
</tr>
<tr>
<td>And External ref = blank</td>
<td>Refund amount not = 0</td>
<td></td>
<td>Transaction has been refunded (partly or fully)</td>
<td>Check status of IPR record</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Check refund is expected (i.e. it is in the authorised refunds file)</td>
</tr>
</tbody>
</table>
8.1.3 Update Ledger Transaction Records

Update ledger transaction payment record(s) that failed to be updated by the write back message from WPM with the result of the payment as per the information in the WPM Transaction report.

1) Open the LTE screen in SITS Client.
2) Identify the relevant record(s) by retrieving on debtor code (Student number) and transaction date and then find the specific record to update; scroll through the records until you find the correct document type ‘Receipt’ where the time of record created/updated matches date/time in WPM report. Take care to identify the correct transaction, the applicant may have several applications and they can make several attempts to pay the fee, each attempt to pay creates a new receipt record.
3) Press F5 to retrieve the single record for update, do not attempt to edit or save when there are multiple records retrieved.
4) If transaction in WPM was failed (red cross)
   a) Add the Transaction Reference from WPM to the External Reference field on the receipt e.g. SITS104818.
   b) Amend the Transaction State field to ’Cancelled’.
   c) Save.

Note: If you have any difficulties saving the change, double check that you only have one record retrieved and try again.

5) If transaction was successful in WPM (green tick)
   a) Add the Transaction Reference from WPM to the External Reference field on the receipt.
   b) Amend the Transaction State field to ‘Awaiting Import’
   c) Save.
Note: If you have any difficulties saving the change, double check that you only have one record retrieved and try again.

d) Open the IPR screen in SITS Client and retrieve the IPR record for the application. Retrieve on User Code = Student number and Updated date = Payment date. If several records are retrieved make sure you identify and retrieve the correct IPR record.

e) Amend the payment status to ‘Paid’ and Reg. status to ‘Waiting’ on the IPR record.

f) Then amend App. Status to ‘Submitted via web’, if it isn’t set to that already.

g) Save changes
h) Open Application form (IPA record) via Other menu, amend Status to Submitted, if it isn’t set to that already, save change.

i) The application is now in a status to be picked up for Manual TRAN.

8.2 Refunds

This process ensures that refund requests are investigated and that authorised refunds are made to the customers where required.

Refund Scenarios;

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Current application fee is NOT the correct value now. It has been set too high. There are live applications that have been overcharged.</td>
<td>The fee recorded on the IPO for the relevant course needs to be amended. A refund will be issued via the WPM portal for the overcharge amount against the transaction. The refund will not be recorded in the SITS system.</td>
</tr>
<tr>
<td>2 Current application fee is NOT the correct value now. No live applications that have been charged.</td>
<td>The fee recorded on the IPO for the relevant course needs to be amended.</td>
</tr>
<tr>
<td>3 Current application fee is NOT the correct value now. It has been set too low. There are live applications that have been undercharged.</td>
<td>The fee recorded on the IPO for the relevant course needs to be amended.</td>
</tr>
<tr>
<td>4 Applicant was eligible for a waiver and did not contact GAO before submitting the application with a payment. They then demand a refund and GAO agree it is appropriate.</td>
<td>A refund will be issued via the WPM portal. This will refund the payers card and create a refund transaction in WPM. The refund will not be recorded in the SITS system.</td>
</tr>
<tr>
<td>5 Card holder contacts the Cashiers Office or Graduate Admissions to say they don’t remember making the payment.</td>
<td>Locate transaction in SITS/WPM by reference id or date. Confirm correct transaction by checking last 4 digits of card and expiry date with the card holder. If the card belongs to someone other than the applicant and the card holder demands a refund then a refund will be processed, the application must be marked as unpaid and the applicant contacted for alternative payment off system. The relevant UAB will be informed so that they can cease assessment of the application. If the card belongs to the applicant then no refund will be forthcoming.</td>
</tr>
</tbody>
</table>
6 Applicant prompted to make £150 application fee payment when attempting to submit the application.

Locate a second invoice on LTE and set the transaction state on the record to ‘cancelled’. Applicant can then attempt to submit the application again and should now only be prompted to pay £75 application fee to submit.

8.2.1 Investigate payment(s) requiring refunds

Identify all applicants’ financial transactions in SITS that may require a refund; either because they relate to the affected occurrence of a course with an incorrect fee or because a request for refund has been received and approved.

1) Retrieve relevant IPR records


b) Or for a specific applicant using Transfer code or Surname and Forename fields, plus Reg. status = ‘Transfer Complete’ and Payment status = ‘Paid’.

2) From the menu bar select Other>>Ledger details>>Ledger entry records (LTE) for each IPR record.

3) Locate the transaction with Document Type = ‘Receipt’ and Transaction State of ‘Awaiting Import’ for each IPR and note the External Reference. This relates to the Trans Ref field in WPM, and will be used to retrieve the correct transaction in WPM in order to process the refund. It will have a prefix of SITS e.g. ‘SITS106700’.

4) If the application had already been processed as complete then the relevant UAB must be informed so that they can cease assessment of the application.

Note: N.B. If the refund is for the full amount then the application must be marked as unpaid and either the applicant contacted for alternative payment off system or the application withdrawn.
8.2.2 Authorise and Process refund(s)

Record authorisation of refunds and then process in WPM.

1) Appropriate authorisation must be obtained for all refunds about to be processed. Details of the approved refunds should be kept for audit purposes and filed by month.

2) Identify the required transaction in WPM Extranet Immediate Card Payments report (External reference on LTE will match Trans ref in WPM) and double click on Trans ref or Payment Success icon to open the detail screen.

3) Within the detail screen select action Refund.

4) Type in ‘Amount to refund’ box the amount we wish to refund against the transaction.

5) Click the ‘Refund’ button, and confirm OK. The successful refund will be displayed.
6) Verify that the refunds are shown as expected in the Immediate Card Payments report. The cardholder’s bank account will have been credited with the refund value and they will receive an email confirming the refund has happened.

7) Immediate Card Payments report should be run periodically for Refunds only and compared against records of approved refunds.

8.2.3 Monthly Audit of Refunds

Refund transactions must be monitored on a monthly basis and records kept for audit purposes.

1) Run the Immediate Card Payments report in WPM Extranet for Refund transactions only. The report runs by original transaction date not refund date, so it is necessary to run the report for dates ranging from the beginning of WPM live use to the end of the month being audited (aka current refunds report).

2) Retrieve list of authorised refunds for the month being checked.

3) Retrieve authorised Refund report (xls) for the previous month (total refund amount).

4) Compare the refunds report to the previous months refund report and any authorised refunds for the month being audited. The total refunds from WPM should match the total from the previous month plus expected authorised refunds from this month.

5) Tick off authorised refunds against the current refund report; note the report is by Payment Date (LTE Transaction date), not date of refund.
   a) Sum up all authorised refunds for the month being checked
   b) Add the sum of refunds from step ‘a’ to the total refund amount from the previous month’s report.
   c) Check that the figure from step ‘b’ is equal to total refund amount from the current refunds report.
   d) Investigate any discrepancies

6) When reconciled the Refunds report should be signed off by an appropriate approver and filed ready to be used for the following months audit process.

   e.g.

   September – has 0 authorised refunds and 0 refunds in the current report
   October – has 2 authorised refunds and 2 refunds in the current report (total £150)
   November – has 4 authorised refunds (£300) and 6 refunds in the current report (total £450)
   £300 refunds from November plus total from last month’s report £150 = £450
   December – has 1 authorised refund (£75) 7 refunds in the current report (total £525)
   £75 refunds from December plus total from last month’s report £450 = £525

Audit of Refund Scenarios;
<table>
<thead>
<tr>
<th>Scenario</th>
<th>Reason</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Authorised refund located in current refund report. Refund amount = expected refund amount</td>
<td>Refund processed correctly</td>
</tr>
<tr>
<td>2</td>
<td>Authorised refund located in current refund report. Refund amount not expected refund amount</td>
<td>Refund not processed correctly, too much refunded</td>
</tr>
<tr>
<td>3</td>
<td>Authorised refund located in current refund report. Refund amount not expected refund amount</td>
<td>Refund not processed correctly, not enough refunded</td>
</tr>
<tr>
<td>4</td>
<td>Authorised refund not located in report.</td>
<td>Refund not processed</td>
</tr>
<tr>
<td>5</td>
<td>Total refund amount from the current refunds report = sum of all authorised refunds for the month being checked added to the total refund amount from the previous month’s report</td>
<td>All refunds processed correctly</td>
</tr>
<tr>
<td>6</td>
<td>Total refund amount from the current refunds report NOT = sum of all authorised refunds for the month being checked added to the total refund amount from the previous month’s report</td>
<td>Refund in current report but not in Authorised refund list. Paperwork misfiled or missing. Refund processed in next month but WPM report is based on original payment date.</td>
</tr>
</tbody>
</table>

Further Help and Information
9. Further Help and Information

9.1 Student Systems Support Centre (SSSC)

The Student Systems Support Centre (SSSC) provides guidance and assistance with the use of the University's student systems and associated business processes. Guidance and further information about eVision can be found on the Student Systems Support Centre website:

http://www.admin.ox.ac.uk/studentsystems/

9.2 Education IT Programme (Edu IT)

The Education IT Programme (Edu IT) is responsible for delivering the development of Oxford's IT-based systems used by academic and administrative staff, applicants and students in support of many aspects of teaching and learning. Further information about the programme can be found at:

http://www.admin.ox.ac.uk/aad/studentsystems/programme/

9.3 Data Protection

You should familiarise yourself with the University's policy on Data Protection by reading the information available at:

http://www.admin.ox.ac.uk/councilsec/dp/policy.shtml

Further information about the Data Protection Act can be obtained from the website of the University’s Data Protection Officer:

http://www.admin.ox.ac.uk/councilsec/dp

All university members should adhere to the following regulations when using IT facilities:

http://www.admin.ox.ac.uk/statutes/regulations/196-052.shtml

9.4 Document Information

This document is subject to change, please ensure you have the latest version.

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Version</th>
<th>Summary of Changes</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/07/2015</td>
<td>0.1</td>
<td>Initial Creation of PG1 Manual</td>
<td>MRE</td>
</tr>
<tr>
<td>22/08/2015</td>
<td>0.2</td>
<td>Updated including PG2</td>
<td>MRE</td>
</tr>
<tr>
<td>20/09/2015</td>
<td>1.0</td>
<td>Updated Manual with GAF changes signed off Nadia and Charlie</td>
<td>MRE</td>
</tr>
<tr>
<td>23/09/2015</td>
<td>1.1</td>
<td>Combined quick and individual application processing into one manual</td>
<td>MRE</td>
</tr>
<tr>
<td>21/04/2016</td>
<td>1.2</td>
<td>Added Annual Changes</td>
<td>MRE</td>
</tr>
<tr>
<td>12/08/2016</td>
<td>1.3</td>
<td>Added Annual Changes roll over task. Checked by Caroline Caroline Beadle.</td>
<td>AQT</td>
</tr>
<tr>
<td>30/08/2016</td>
<td>1.4</td>
<td>Section on WPM Reconciliation Processes added</td>
<td>AQT</td>
</tr>
<tr>
<td>05/09/2016</td>
<td>1.5</td>
<td>Section on new Supporting documents from applicant self service and update section 9.</td>
<td>AQT</td>
</tr>
<tr>
<td>03/10/2016</td>
<td>1.6</td>
<td>Inclusion of scenario 6 to refund section &amp; added Edu IT to section 9</td>
<td>AQT</td>
</tr>
<tr>
<td>15/11/16</td>
<td>1.7</td>
<td>Inclusion of college holds (section 4.4.2).</td>
<td>AQT</td>
</tr>
<tr>
<td>09/12/16</td>
<td>1.8</td>
<td>Updated screenshots for 9.2 upgrade and slight re-wording of text referencing menus.</td>
<td>AQT</td>
</tr>
</tbody>
</table>