

FACT SHEET – SER Admissions System Project (15 August 2016)

What the project has been asked to do – the Scope

Using Tribal functionality, define and build an online system that will allow the University to effectively and efficiently manage the application, decision making and confirmation processes for all applications that fit the agreed core path; deliver full functionality for the Postgraduate Taught application pool; implement wherever possible, automated functionality through an applicant portal that will allow applicants to follow the progress of their application and respond to requests for more information; deliver online improvements to the criminal conviction, disability and fee status processes; deliver agent and partner portal tasking that will allow full applicant interaction where appropriate consents have been given; review, agree and implement efficiencies in processing and workflows across applicant cohorts; identify and prioritise additional functionality to be taken forward in Wave 4.

What the project will deliver:

- A secure user login and registration process using a unique identifier as the primary key to link future interaction with the application process.
- An interface for applicants that complies with corporate style and layout and is user friendly. Entrants will be given access to the standard University portal that will allow some user configuration where appropriate.
- A tool to allow staff to manage the decision making process, within specified service level agreements, and communicate with stakeholders as appropriate.
- A tool to allow staff to view the status and progress of administrative tasks.
- A dynamic online application form which displays questions relevant to the applicant and/or the cohort.
- A view accessible by current applicants to see current offers with the ability to manage these by accepting, declining or withdrawing from an offer. (Applicant portal)
- An agent tool that allows an agent to manage their applications.
- An easy to use process for the uploading of references by third parties (i.e. nominated applicant referees).
- A document upload facility that integrates across the SER Programme and facilitates of document retention/archiving strategies.
- A tool to identify applicants by fee status and manage offer numbers within specified targets where appropriate.
- A system that uses workflow to determine decision making processes whether that is by one or more people or a committee.

To be delivered by 01 Sept 2016 (for all major cohorts)

- Online application form
- Basic module request functionality for Collaborations & Study Abroad (CSA)
- Automatic transfer of submitted application forms to create application records (TRAN)
- Duplicate record matching reports
- Applicant portal with basic functionalities

To be delivered by 26 Sept 2016 (for all major cohorts)

- Decision making core path (For further details see below (A))
- Full features for PGT cohort (For further details see below (B))
- Criminal conviction and disability workflows
- Algorithm for Widening Participation (WP) flagging
- Contextual data flagging
- Totals tables
- Restricted offer numbers
- Agent portal⁺
- Enhancements to fee status functionality⁺
- Automatic transcript requests functionality for existing STA students⁺

+ These developments will be moved to wave 4 if not completed in wave 3

Extra features the project aims to deliver for PGT cohort by 26 Sept 2016.

- Decision making functionality with the workflow to support school decision making process
- Ability for applicants to withdraw the application, accept or decline an offer
- Basic offer library (OLB) functionality specific to PGT
- Ability to assign a course director
- Ability for the applicants to request eg: defer, withdraw or further information (B)

To be delivered from 26 Sept to Dec 2016

- Further development / customisation to fit other cohorts (deliver full features)
- Continuous improvements to anything developed in wave 3
- Confirmation tools
- Snagging
- Applicant rankings – automatically detect entry level requirements
- Review and develop workflows to support the decision making process in Medicine
- Online interview functionality for relevant cohorts
- Online matriculation
- Improvements to offer making functionality using Offer Library (OLB)

As part of decision making Core Path, the project aims to deliver:

- Ability to view all applications ie. Not only applications submitted online. This feature will be role group dependent
- Ability to request and view uploaded documents and supporting information
- Basic ability to save a decision
- Basic ability to commit a decision
- Basic automated Standard Letters and Emails (SRLs)
- Automated reminders for staff and applicants (eg: deadlines, document upload requests)
- Ability to view and accept the evidence of conditions
- Notifications about document uploads (additional info, evidence for conditions..etc) (A)

The principles of the project. I.e. the Admissions System Project aims to:

- Secure consistency across cohorts where possible
- Enable ownership
- Enable and assure legislative compliance
- Create a robust and sustainable design and build
- Offer quality data (timely, fit for purpose)
- Facilitate good/best practice