



How to view, create, update Undergraduate Admissions Applications in Banner SIS

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Overview

Forms covered include:

- SAAADMS (including all tabs)

Forms accessible from the SAAADMS options menu:

- SAASUMI -- application summary form
- SOAGPAT -- GPA/ Averages
- SOASUPL -- Supplemental Information
- SAAQUAN -- freeform Q & A from online application
- SOATEST -- Test Scores
- SOAHSCH and SOAPCOL-- High School and Prior College / University
- SOAPCOQ - Prior College / University summary query form
- SAAACKL -- Admissions Application/Checklist Summary form
- and the Field Lookup Utility - under the How to Document Index (Icon in tool bar)

Tasks covered include:

- Viewing admissions status (checklist; decisions, etc.)
- Making changes to current applications including program; major, or concentration
- Adding an application(s)
- Deferring an application
- Creating an application in SAAADMS including prior education (SOAHSCH, SOAPCOL) and/or test scores (SOATEST)
- Updating the admissions documents' checklist

Tasks not covered but acknowledged include:

- Indexing and updating imaged documents (see Imaging documentation)

Note	The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as confirmation of saved data and warnings or errors that may block your progress.
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Entry term; press LIST for valid codes, DUPLICATE ITEM for prospect summary.				
Record: 1/1		...	List of Valu...	<OSC>

Accessing the “Admissions Application Form” (SAAADMS)

Type the name of the form SAAADMS in the **Go To** field.

The following form will appear:

Priority	Term	Program	Catalog	Level	Campus	College	Degree
1	201009	B Ed Kindergarten/Elei	200909	Undergraduate	Downtown	Faculty of Education	Bachelor of Educator

Priority	Term	Type	Field of Study	Department	Attached to Major
1	201009	Major	Kindergarten & Elementary Ed	Integrated Studies in Ed	

Enter the ID and Term, then select **Next Block** to access application information for the named applicant.

The View Current/Active Curricula check box offers the option to restrict the records returned to active records only (i.e. no historical records).

Field Lookup

View the Field Lookup tool for descriptions and details for each field. It is accessible through the Banner Documentation Index via the Banner for administrative staff (INB) web site at:

<https://www.mcgill.ca/inb>

Banner Documentation Index

Search for documentation by form name

Enter the 7-character Banner form name (eg GUAPSWD).

Form name:

Launch the tool for looking up fields in Banner forms:

[BANNER FORM FIELD LOOKUP TOOL](#)

Search for documentation by module

- GENERAL
- FINANCE
- STUDENT
- BANNER STUDENT AID for CANADA (BSAC)
- HUMAN RESOURCES

Documentation legend

- How-to (PDF file)
- Supplementary documents
- Related website
- Field Lookup
- Field Lookup (Printer-friendly)
- Video

How to view, create or update admission applications (SAAADMS) 26/FEB/07

The following forms are also included in the above document:

Find the form required (E.g. SAAADMS) and click one of the two field lookup icons in the right columns in order to access either the tool or a printer friendly version of it.

The Field lookup tool displays the particular Banner form and hovering the cursor over any field will display a description of the field's usage. (See example of Application Status below)

Use the **Next Block** icon to cycle through the various tabs or blocks within a form.

← Next Block

Related Forms

Admissions Application SAAADMS 8.4 [1:21] (TBAN1)

ID: Term: View Current/Active Curricula

Application | Curricula | Fees, Mail Submission, Withdrawal Data | Checklist | Sources, Interests, Comments | Contacts, Cohorts, Attributes

Application

Entry Term:

Admission Type:

Student Type:

Residence:

Site:

Full or Part Time: Full Time Part Time None

Outstanding Requirements:

Entry Term

This field displays the term for which the applicant has applied. This defaults from the value defined in STVTERM for the current admission period.

Application Status: Decision Made

Application Status Date:

Maintained By:

Application Decision: Admitted Pending Final Results

Application Decision Date:

Maintained By:

Curricula Summary - Primary

Priority	Term	Program	Catalog	Level	Campus	College	Degree
1	201009	B Ed Kindergarten/Ele	200909	Undergraduate	Downtown	Faculty of Education	Bachelor of Educator

Field of Study Summary

Priority	Term	Type	Field of Study	Department	Attached to Major
1	201009	Major	Kindergarten & Elementary Ed	Integrated Studies in Ed	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Viewing admissions status (checklist, decisions, etc.)

SAAADMS is primarily used for viewing undergraduate student application information. Most of the information found within this form is entered into Banner via batch processes which copy applicant info directly from the web application forms.

The primary reasons for viewing admissions info through SAAADMS is to verify status, program curriculum and field of study for an application; to acknowledge or verify the receipt of admissions documents; or to assess applications in order to render admissions decisions. Occasionally, modifications to an application are made through this form.

Application Tab

The Application tab displays most of the required information for viewing an application. The upper portion displays the entry term, the application number (applicants can submit as many applications as they desire), the type of applicant and the application status. Only Admission Type; Student Type; Residence; and Full or Part Time status are allowable modifications in this block. The application status is automatically generated by the system and should never be manually updated.

The lower portion (Curricula & Field of Study) displays a summary of only the current, active program and field of study choice(s) for the selected application. A scroll bar (at the far right in the upper block) enables review of the different applications, if they exist. The Application Number field indicates which application is being viewed, and the application selected then applies to the lower blocks and to all of the other tabs. (You must always return to the Application tab to select a different application when viewing data under any of the other tabs.)

Application | Curricula | Fees, Mail Submission, Withdrawal Data | Checklist | Sources, Interests, Comments | Contacts, Cohorts, Attributes

Application

Entry Term: 201009 | Fall 2010 | Application Number: 3 | Application Date: 17-NOV-2010

Admission Type: 41 | Quebec CEGEP/IB | Application Status: 1 | Items outstanding
 Student Type: F | New Admit Fall | Application Status Date: 17-NOV-2010
 Residence: Q | Quebec resident | Maintained By: S SYSTEM
 Site: | | Application Decision: |
 Full or Part Time: Full Time Part Time None | Application Decision Date: |
 Outstanding Requirements:

Curricula Summary - Primary

Priority	Term	Program	Catalog	Level	Campus	College	Degree
1	201009	B Ed/ B Mus	201009	Undergraduate	Downtown	Faculty of Education	Bachelor of Educator

Field of Study Summary

Priority	Term	Type	Field of Study	Department	Attached to Major
1	201009	Major	Music Elementary & Secondary	Integrated Studies in Ed	

Checklist Tab

Depending on your security rights, you can update the checklist items in SAAADMS or SAAACKL. In SAAADMS, the **Checklist tab** lists the documents required to complete an application, based on rules for the program and type of applicant. This tab displays the same list as the SAAACKL form.

Received Date indicates if and when the document was received. Applicants from Ontario high schools and CEGEPs will require an electronic transcript which is received and loaded automatically. If additional documents are required from the applicant, these can be added to the checklist. To add an item to the checklist, select **Record>Insert** from the menu. To remove an item from the checklist, highlight the item and select **Record>Remove**

The screenshot shows the 'Application Checklist' form with the following data:

Admission Request	Description	Received Date	Item	Item Description	Mandatory Indicator	Print Indicator
CGP1	CEGEP Electronic Transcript	04-MAR-2009	C12244	Champlain College	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	First Request:	Count:		Generated by System: <input checked="" type="radio"/> Yes <input type="radio"/> No	Date: 28-FEB-2009	
	Last Request:	Deadline:		Checklist Origin: BASELINE	Status:	

Applicants upload their documents using Minerva. Departments who receive paper documents from the applicant must scan and index them. This automatically updates the **Received Date** in SAAADMS and SAAACKL. Departments not using the imaging system to scan and index must manually update the **Received Date**.

Documents such as transcripts will identify the institute of origin in the **Item Description** field. Item Descriptions may be included for other document types. If the **Item Description field** is not populated, the imaging system will use this field to record the Banner user ID of the individual who indexes the document.

The screenshot shows the 'Application Checklist' form with the following data:

Admission Request	Description	Received Date	Item	Item Description	Mandatory Indicator	Print Indicator
CGP1	CEGEP Electronic Transcript	04-MAR-2009	C12244	Champlain College	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	First Request:	Count:		Generated by System: <input checked="" type="radio"/> Yes <input type="radio"/> No	Date: 28-FEB-2009	
	Last Request:	Deadline:		Checklist Origin: BASELINE	Status:	
CLTI	College/University Transcript	09-MAR-2009	026823	Concordia University	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	First Request:	Count:		Generated by System: <input type="radio"/> Yes <input checked="" type="radio"/> No	Date: 09-MAR-2009	
	Last Request:	Deadline:		Checklist Origin: BXS	Status:	
CONF	Confirmation Deadline				<input type="checkbox"/>	<input checked="" type="checkbox"/>
	First Request:	Count:		Generated by System: <input type="radio"/> Yes <input checked="" type="radio"/> No	Date: 23-JUL-2009	
	Last Request:	Deadline:	13-AUG-2009	Checklist Origin: BASELINE	Status:	

For more details on updating the checklist items, refer to the SAAACKL section of this document.

Sources, Interests, Comments

Additional information is or may be stored under the Sources Interests, Comments tab (source of application - paper or web), current interests (including housing requests), or comments (such as who is authorized to have information on the application status).

Background Institution	Description	Primary Indicator	Activity Date
WEBAPP	Web Application for Admission	<input type="checkbox"/>	28-FEB-2009
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Interest	Description	Activity Date
A5	Debate	09-NOV-2010
AL	Lacrosse	19-NOV-2010
MJ	Trumpet	19-NOV-2010

Originator	Comment

Contacts, Cohorts, Attributes Tab

The Contacts, Cohorts, Attributes tab is where any attributes regarding admissions qualifications are noted. Although the Contacts block is not currently used, some faculties (Medicine; Dentistry; Physical & Occupational Therapy; and others) use the Cohorts block, and all applications have an attribute indicating the placement year (Year 1, Year 2, etc).

Contact Type	Description	Contact Date
		26-OCT-2010 05:08:17 PM

Cohort	Description	Activity Date
		26-OCT-2010

Attribute	Description	Activity Date
CUG0	Undergraduate Level Year 0	08-JAN-2010

Fees, Mail Submission, Withdrawal Data Tab

The **Fees, Mail Submission, Withdrawal Data** tab is infrequently used. The Application Fees block does not show payment details but does indicate if a fee has been waived. Some information will be stored in the Additional Data block, such as the education level of the applicant or the session (used for Continuing Education). Withdrawal Reason is also used where applications have been withdrawn.

Application	Curricula	Fees, Mail Submission, Withdrawal Data	Checklist	Sources, Interests, Comments	Contacts, Cohorts, Attributes
<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <h3>Application Fees</h3> <p> Application Fee: <input type="radio"/> Charge Fee <input type="radio"/> Waive Fee <input checked="" type="radio"/> None <small>.....</small> </p> <p> Last Application Fee: <input type="radio"/> Fee Charged <input type="radio"/> Fee Waived <input checked="" type="radio"/> No Fee <small>.....</small> </p> <p> Application Fee Waiver: <input type="text"/> <input type="button" value="v"/> Application Fee Detail: <input type="text"/> <input type="button" value="v"/> Application Fee Amount: <input type="text"/> Application Fee Date: <input type="text"/> <input type="button" value="c"/> Application Fee Rate: <input type="text"/> <input type="button" value="v"/> </p> </div> <div style="width: 48%;"> <h3>Additional Data</h3> <p> Session: <input type="text"/> <input type="button" value="v"/> Educational Level: <input type="text"/> <input type="button" value="v"/> High School Diploma Educational Goal: <input type="text"/> <input type="button" value="v"/> Recruit Type: <input type="text"/> <input type="button" value="v"/> Recruiter: <input type="text"/> <input type="button" value="v"/> Interview: <input type="text"/> <input type="button" value="v"/> Legacy: <input type="text"/> Citizen: <input type="text"/> </p> </div> </div>					
<h3>Mail Submission</h3> <p> Letter: <input type="text"/> <input type="button" value="v"/> Wait Days: <input type="text"/> Initials: <input type="text"/> <input type="button" value="v"/> </p>					
<h3>Withdrawal Data</h3> <p> Withdrawal Reason: <input type="text"/> <input type="button" value="v"/> Institution Attended: <input type="text"/> <input type="button" value="v"/> <input type="text"/> </p>					

Associated Forms

There are a number of forms associated with SAAADMS which are accessible from the Options menu. These forms provide additional information, either as summaries of information available within SAAADMS or supplementary to it. Some are query only while some may be used to update information related to an applicant or their application. For specific information on fields within any of the following forms, please refer to the Field Lookup utility within the Document Index.

SAASUMI

This form is available in the Options menu only while the cursor is in the key block of SAAADMS, and when at minimum, an ID has been entered in the ID field. Selecting SAASUMI from the menu will call the form and automatically populate the blocks. This is a query only form which provides a summary of all of all applications submitted by the applicant. Selecting any of the application rows in the block will display the respective curricula and field of study information. If a term is specified in SAAADMS prior to calling SAASUMI from the options menu, only applications specific to the term stated will be returned.

ID: Level: Campus: College: Degree:
 Term: Program: Field of Study Type: Field of Study Code:

Admissions Application Summary												
Entry Term	Application Number	Application Preference	Admission Type	Student Type	Residence	Outstanding Requirements	Status	Status Date	Decision	Decision Date		
<input type="checkbox"/>	200909	2	<input type="checkbox"/>	03	F	C	<input checked="" type="checkbox"/>	D	22-JUL-2009	60	13-AUG-2009	
<input type="checkbox"/>	200909	1	<input type="checkbox"/>	51	F	C	<input type="checkbox"/>	D	16-MAR-2009	18	16-MAR-2009	
<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>					

Curricula Summary - Primary							
Priority Term	Program	Catalog	Level	Campus	College	Degree	
1	200909	B Ed Kindergarten/Ele	200909	Undergraduate	Downtown	Faculty of Education	Bachelor of Educator

Field of Study Summary				
Priority Term	Type	Field of Study	Department	Attached to Major
1	200909	Major	Kindergarten & Elementary Ed	Integrated Studies in Ed

Providing more information in the key block of SAASUMI will, likewise, restrict what information will be displayed in the following blocks. (i.e. specifying a particular term will result in only applications for that term being displayed.)

SOAGPAT

This form is used to record Grade Point Averages for an applicant.

The form incorporates the rating or averaging type used along with the actual rating, for each application submitted.

ID:

GPA Type	GPA Description	GPA	+/- Used	School	School Description	Application Number	Term	Activity Date
SRAA	Self-rptd Acad Avg (6 - 100)	94.800000000	<input type="checkbox"/>	999999	Miscellaneous Institutions	3	201009	08-JAN-2010
SRSA	Self-rptd Schl Avg (6 - 100)	94.900000000	<input type="checkbox"/>	999999	Miscellaneous Institutions	3	201009	08-JAN-2010

Averages are usually updated by an electronic batch process when electronic transcripts are received for Quebec CEGEP and Ontario high school applicants. Scores from Individual sources may be entered directly by selecting the GPA type, the score, the application number and the term code. Save, and repeat the process for each application and each requested GPA.

The school field must always display 999999. All averages must be attached to a term and application number.

SOASUPL

The first block of the Application Supplemental Information form is currently only used at McGill to record the admit school, which is the school from which the applicant has most recently completed any studies and generally the institute wherein the applicant has achieved the highest level of education.

ID: Term: Application Number:

Supplemental or Agency Data

Admission County: <input type="text"/>	<input type="checkbox"/> Rural County Indicator	Number of Dependents: <input type="text"/>
Admission State: <input type="text"/>		Agency File Number: <input type="text"/>
Admission Nation: <input type="text"/>		Agency Application Year: <input type="text"/>
Birth City: <input type="text"/>		Year Applied 1: <input type="text"/>
Birth County: <input type="text"/>	<input type="checkbox"/> Rural County Indicator	Year Applied 2: <input type="text"/>
Birth State: <input type="text"/>		Year Applied 3: <input type="text"/>
Birth Nation: <input type="text"/>		Year Applied 4: <input type="text"/>
Admit School: <input type="text" value="028823"/> <input type="text" value="Concordia University"/>		<input type="checkbox"/> Agency Fee Waived
Self-reported Ethnicity: <input type="text"/>		Cycle Added: <input type="text"/>
Special Consideration: <input type="text"/>		Cycle Changed: <input type="text"/>
AMCAS ID: <input type="text"/>		Last Agency Report Date: <input type="text"/>
AMCAS Bio Number: <input type="text"/>		Effective Date: <input type="text"/>
<input type="checkbox"/> Hispanic Indicator		Next MCAT Date: <input type="text"/>
<input type="checkbox"/> Under-represented Minority Indicator		Application Type: <input type="text"/>

The second block of the form is used to record additional data specific to web application questions or for various professional or specialized programs. This second block is only accessible if a term and an application number have been specified in the key block. The flags are used to indicate a Yes/No response. Click in the flag number to see what information it pertains to. (See Flags Descriptions)

Flags										Flags Description
1	2	3	4	5	6	7	8	9	10	
N										Disadvantaged

Number	Description	Value	Number	Description	Value
1	Law Category		11	Previous Application	YR:2009 PGM:Speech pathology
2	Other Law App		12	CEGEP Credits	30
3	Joint Law Program		13	Transfer Credits	
4	Music Instrum/Voice		14	Adv Standing Credits	
5	Music Area		15	Letter Postscript	c
6	Music Audition Opt		16		
7			17	Graduate Discipline	
8			18	Proposed Supervisor	
9	Theological College		19		
10	LSAT Request Status		20	Placement Test Date	

SAAQUAN

This form is used by some faculties to display long or free form type responses to questions posed in student applications. The form displays a summary of the application along with the questions and responses, enabling a display of the questions or responses in larger, and in some instances, editable windows outside the display area provided. Select the pencil icons to expand the editable fields.

Application Summary Application 1 of 2

Entry Term: 200909 Decision: 60 Offer of Admission Status: D Decision Made Application Date: 28-FEB-2009

Application Number: 2 Admission Type: 03 BC High School Session: Outstanding Requirements

Application Preference: Student Type: F New Admit Fall Residence: C Canadian or perms Full or Part Time: Full Time

Priority 1 Program BED-KIND Level College UG Campus ED Degree 1 BED Catalog Term 200909 Field of Study Type: MAJOR Code: KEE Department: 0518

Application Questions and Answers

Sequence Number	Applicant Question	Admission Request	Originated From Web	Display On Web Summary
1	What is the meaning of life?			<input checked="" type="checkbox"/>
Question Answer:	If I knew that, I wouldn't be sitting here trying to make up fake data for training... or maybe I would!			
Essay Answer:				

SOAPCOL

All CEGEPs, Colleges or Universities reported by the applicant are recorded here.

Prior College and Degree	Majors, Minors, Concentrations	Prior College Address
Prior College		
Prior College:	C26299 Marianopolis College	Enrollment Planning Service Code: <input type="text"/>
Transcript Reviewed Date:	<input type="text"/>	<input type="checkbox"/> Official Transcript
Admissions Request:	CGP1 CEGEP Electronic Transcript	
Degree Details		
Degree:	x00999 DEC II	Degree Date: 01-MAY-2006 <input type="checkbox"/> Primary Degree Indicator
Attended From:	01-AUG-2004	Attended To: 01-MAY-2006 Year: <input type="text"/>
College:	<input type="text"/>	
SIS-HR:	1	GPA: <input type="text"/>
Honors:	<input type="text"/>	Goal: <input type="text"/>

Each is linked to a specific checklist code. Each can also be linked to multiple degree records, start, end and graduation dates as well as GPAs. The system use indicates whether it is used for Student (1) or Human Resources (2). The Goal field is used to indicate whether the previous school information should appear on the McGill transcript as part of the basis for admission.

SOAPCOQ

The Prior College Summary Form is a stand alone query form which is used to query information about a person's prior college experience, such as degrees, number of course hours, and GPA.

ID: 777720009 Campbell, Kimberly

Prior College	Degree	College	Honor
C12244 Champlain College	x00999 DEC II	<input type="text"/>	<input type="text"/>
Degree Date: 01-DEC-2005	Year: <input type="text"/>	Attendance Dates: 01-SEP-2003 01-DEC-2005	Transfer Hours: 1,000
			Transfer GPA: <input type="text"/>

SAAACKL

Depending on your security rights, you can update the checklist items in SAAADMS or SAAACKL. The Admissions Application/Checklist Summary (SAAACKL) form is used to display admissions applications and their corresponding checklist items. These are documents required to complete an application, based on rules for the program and type of applicant. Enter an ID in the key block and click Next Block to display a summary of each application and corresponding curricula information for that ID.

ID: 777720009 Campbell, Kimberly Term: 200909

Application Summary Application 1 of 2

Entry Term: 200909 Decision: 60 Offer of Admission Status: D Decision Made Application Date: 28-FEB-2009

Application Number: 2 Admission Type: 03 BC High School Session: Outstanding Requirements

Application Preference: Student Type: F New Admit Fall Residence: C Canadian or perms Full or Part Time: Full Time

Priority Program Level College Campus Degree Catalog Term Field of Study

1 BED-KIND UG ED 1 BED 200909 Type: MAJOR Code: KEE Department: 0518

Application Checklist

Admission Request	Received Date	Item	Item Description	Mandatory Indicator	Print Indicator
CGP1 CEGEP Electronic Transcript First Request: <input type="text"/> Last Request: <input type="text"/>	04-MAR-2009 Count: <input type="text"/> Deadline: <input type="text"/>	C12244	Champlain College Generated by System: <input checked="" type="radio"/> Yes <input type="radio"/> No Checklist Origin: BASELINE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CLT1 College/University Transcript First Request: <input type="text"/> Last Request: <input type="text"/>	09-MAR-2009 Count: <input type="text"/> Deadline: <input type="text"/>	026823	Concordia University Generated by System: <input type="radio"/> Yes <input checked="" type="radio"/> No Checklist Origin: BXS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The Application Summary section has no user updatable fields. Scrolling through the applications will reflect the corresponding checklist items in the **Application Checklist** section. The primary use of SAAACKL is to view and update receipt data for the documents. This is performed manually by entering the date in the **Received Date** field, or automatically by the imaging system when indexing. For documents received electronically, such as transcripts or test scores, the **Received Date** is automatically updated.

Document requests, in addition to those automatically generated by the system based on rules in the Admissions Checklist Rules Form (SAACHKB), can be entered manually. They will be indicated as such using the **Generated by System** radio buttons (Yes/No). To add an item to the checklist, select **Record>Insert** from the menu. To remove an item from the checklist, highlight the item and select **Record>Remove**

Note

It is important to verify you have chosen the correct application if there are more than one. Note the application number and term as well as the program information before updating any checklist.

There are a number of dates associated with the checklist items. The **First Request** field indicates when the item was initially requested. The **Last Request** field indicates when the most recent request was made. The **Deadline** field is only used to record a confirmation deadline for an accepted applicant. To do so, use the checklist code CONF. The deadline will display to the applicant in Minerva. The **Count** field

indicates the number of times a request for the document was made.

The **Mandatory** checkbox is used to designate the required documents. Enter WEBDISPLAY in the **Status** field to display the checklist item to the applicant in Minerva.

If all mandatory items associated with a specific application are updated with a **Received Date** in the Application Checklist, the **Outstanding Documents** checkbox will be changed from **Y(es)** to blank (no outstanding documents). The **Status** field will then be changed from **I** (items outstanding) to **C** (Ready for review).

Updating the **Received Date** of a high school or prior college transcript will automatically update the Received Date field in the SAAADMS Checklist tab, but not in SOAHSCH or SOAPCOL.

The **Received Date** may also be updated in SAAADMS. However, when using SAAADMS, it is important to verify which application number is being viewed by returning to the Application tab. This is because there is no application number indicator under the SAAADMS **Checklist** tab, like SAAACKL.

For further information on any particular fields, please refer to the Field Lookup utility link in the right hand column of the How to Document index.

Related Banner Forms

Other forms are associated with SAAADMS but they are used in many contexts and are covered elsewhere. In particular, Admissions Officers use SAAADMS in conjunction with SAADCRV which is the Admissions Decision Review form. This form is covered in detail in relation to Admissions Decisions tasks and is also available through the Field Lookup utility.



Creating a new application in SAAADMS

Most of the information accessible through SAAADMS is not originally entered into the Student system through this form. In fact, most information should be entered through the web to ensure its propagation into the appropriate parts of the data base. Only a few instances warrant the creation of a new application or updating a program using SAAADMS. These cases are when an applicant requests changes to existing applications (this is covered in the updating section); for the addition of a new program choice under a new application number, or for a deferral of an offer of admission to another term.

The vast majority of applications are executed by the applicant on the web application form which is then transferred or 'pushed' into Banner via a batch process. Even applications received by paper are transferred into Banner via a staff web application form (on Minerva) and the same push process.

The applicant link is available from this page: <http://www.mcgill.ca/applying/> . The staff link can be found in Minerva under SR Admin>Admissions Menu>Applications Processing Menu.

The step-by-step procedures to update programs and create new applications are found in the next section. The process involves a number of forms in addition to SAAADMS including the Supplementary Information form (SOASUPL), and the checklist for receipt of required documents (SAAACKL), but also the imaging system for indexing all of the support documentation.



Making changes to current applications including program; major, or concentration

One of the primary reasons for making changes in SAAADMS is, as mentioned earlier, to update program and field of study information for current applications. These changes are most often requested by the applicant, to modify their previous choices and are **only** executed if an admissions decision has not already been rendered for the original program choice. Modifications to program or field of study can only be executed within the **Curricula** tab. The program and field of study information available under the Application tab is summary only and does not permit modification. Additionally, because of the non-destructive approach to editing now offered by Banner since version 7, the information previously entered is not deleted. New information is added as the current/active record, while maintaining the previous info in a non-current or inactive state.

The **Application** tab will only display current/active information in the summary blocks, but the **Curricula** tab has two sub tabs which will display all previous records in addition to the current/active records, provided the View Current/Active checkbox in the upper right corner of the Key block has not been selected. Access to these records is gained using the scroll arrows to the upper right in their respective blocks.



The screenshot shows a web application interface. At the top right, there is a navigation bar with the text "Record 1 of 3" and two arrow buttons (left and right). Below this, on the left side, are two labels: "User ID:" and "Activity Date:". To the right of these labels are two input fields. The first input field contains the text "LLAVER" and the second input field contains the text "08-JAN-2010".

The examples on the following pages will demonstrate typical scenarios where changes may be required in order to update the students application information. These examples will provide an overview of the process required, along with the procedural details as a reference.

Example 1: Making a primary curriculum change in a current application

Scenario

The applicant already has an undergraduate admissions application record for Term 2001009. No decision has yet been rendered on it. The applicant wants to switch to a different program.

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate the application for the primary curriculum that needs to be updated.
- Access the Curricula tab for the primary curriculum.
- Update the applicant's primary curriculum program in the Curriculum tab.
- Update the major in the Field of Study tab for the primary curriculum.
- If applicable, update the concentration in the Field of Study tab for the primary curriculum.
- Verify that the changes have been saved.

Procedure

1. Access SAAADMS and enter the McGill ID.
 - a. Check the View Current/Active Curricula box if you only want to see current and active admission applications.
 - b. Next Block.
2. Locate the application for the primary curriculum that needs to be updated.
 - a. In the Application tab, use the scroll bar to locate the Application Number that needs to be updated.
 - b. Update information on the left, if required. **DO NOT UPDATE INFORMATION IN APPLICATION STATUS OR APPLICATION DECISION FIELDS.**
 - c. View the current academic program information for the selected application in the Curricula Summary and the Field of Study Summary blocks. These blocks are read-only.
 - Note that a value of 1 in the Priority field of the Curricula Summary block refers to a primary curriculum.
 - Use the scroll bar to verify if a secondary curriculum exists.

3. Access the Curricula tab for the primary curriculum.

Note that the Curricula tab is composed of two sub-tabs: One of the tabs is called Curriculum, the other is Field of Study.

4. Update the applicant's primary curriculum in the Curriculum tab.
 - a. Verify that you are making changes to a current record (Current field = Y).
 - b. Verify if a secondary curriculum exists and whether it still applies. (Check the scroll bar.) If not, delete it.
 - c. **New to Banner Version 8:** Select the Duplicate icon in the center. This will duplicate the current program while maintaining the same priority. Proceed to step 'e'.
 - d. Alternatively, you may Select Record > Insert (F6 key) to insert a new curriculum record, but this will change the priority to the next available number, which will need to be changed back to priority 1 in the case of a primary curriculum or a 2 if it is the secondary program of a valid dual program.



Note

If caution is not exercised, a new secondary or tertiary program may be created which Banner will **not** recognize as invalid. Consequently, the original program choice will remain the active program and the changes will not have the intended effect of replacing the prior choice.

- e. On the Program field, click the down arrow to select the new program the applicant wishes to switch to.
 - Select “Change Curriculum” from the Option List.
 - The message “Base Curriculum Items will be Replaced” appears.
 - Click OK.
 - Select a program from the list.
 - The following fields will be filled: Program, Level, College, Degree.
- f. Enter the campus code or look it up using the down arrow next to the Campus field.
 - It is very important that you ensure the proper code is entered. If you neglect to add the code, you will have to repeat this procedure. Note that the campus code affects fees.
- g. Save and verify that the transaction was saved with the autohint line.
 - Review the information you entered by going to the Field of Study (if you are not automatically taken there).

5. Update the major in the Field of Study tab for the primary curriculum.
 - a. Enter the appropriate value in the Priority field (1).
 - b. Enter the appropriate value in the Type field (MAJOR).
 - c. Using the down arrow next to the Field of Study field:
 - Select Attached Majors/Departments from the list and then select a code.
 - The Department field will automatically be filled in.
 - Save.
6. If applicable, update the concentration in the Field of Study tab.
 - a. Select Record > Insert (F6 key).
 - b. Enter the appropriate value in the Priority field (1).
 - c. Enter the appropriate value in the Type field (CONCENTRATION).
 - d. Using the down arrow next to the Field of Study.
 - Select Attached Concentrations from the list, if any exist, and then select a code.
 - The Attached to Major field is automatically filled in. The Department field remains blank.
 - Save.
7. Verify with the autohint line that the changes have been saved.
 - a. Click on the Application tab and view the Curricula and Field of Study summaries to verify the changes have been made.

Example 2: Changing a primary curriculum to a concurrent program

Scenario

The applicant already has an undergraduate admissions application record for Term 201009. The applicant wants to switch to a concurrent program, BSC-BED. No decision has yet been rendered.

You will need to add the concurrent program information.

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate the application for the primary curriculum that needs to be updated.
- Access the Curricula tab for the primary curriculum.
- Update the applicant's primary curriculum program in the Curriculum tab.
- Update the applicant's major in the Field of Study tab for the primary curriculum.
- If applicable, update the applicant's concentration in the Field of Study tab for the primary curriculum.
- Update the applicant's secondary curriculum program in the Curriculum tab.
- Update the applicant's field of study information in the Field of Study tab for the secondary curriculum.
- Verify that the changes have been saved.

Procedure

1. **Access SAAADMS and enter the McGill ID.**
 - a. Check the **View Current/Active Curricula** box to restrict current and active admission applications.
 - b. **Next Block.**
2. **Locate the application for the primary curriculum that needs to be updated.**
 - a. You are in the **Application** tab. Locate the **Application Number** that needs to be updated.
 - b. The first block of the **Application** tab contains current admissions application information for the selected application. Only the information on the left should be updated, if required.
 - c. View the current academic program information for the selected application in

the **Curricula Summary** and the **Field of Study Summary** blocks. These blocks are read-only.

- Note that a value of 1 in the **Priority** field of the **Curricula Summary** block refers to a primary curriculum.

3. Access the Curricula tab for the primary curriculum.

Note that the **Curricula** tab is composed of two sub-tabs: One of the tabs is called **Curriculum**, the other is **Field of Study**.

4. Update the applicant’s primary curriculum program in the Curriculum tab.

- New to Banner Version 8:** Select the Duplicate icon in the center. This will duplicate the current program while maintaining the same priority. Proceed to step ‘c’.
- Alternatively, you may Select Record > Insert (F6 key) to insert a new curriculum record, but this will change the priority to the next available number, which will need to be changed back to priority 1 in the case of a primary curriculum or a 2 if it is the secondary program of a valid dual program.

Note		If caution is not exercised, a new secondary or tertiary program may be created which Banner will not recognize as invalid. Consequently, the original program choice will remain the active program and the changes will not have the intended effect of replacing the prior choice.

- Click the down arrow button to search for the new **Program** field (e.g. BSC-BED).
 - Select **Change Curriculum** from the list.
 - The message “Base Curriculum Items will be Replaced” appears.
 - Click **OK**.
 - Select a program from the list.
 - The following fields will be filled: **Program, Level, College, Degree**.
- Enter the campus code or look it up using the down arrow next to the **Campus** field.
 - It is very important that you ensure the proper code is entered. If you neglect to add the code, you will have to repeat this procedure. Note that the campus code affects fees.
- Save.**
 - Review the information you entered by going to the **Field of Study** (if you are not automatically taken there).

5. Update the applicant's major in the Field of Study tab for the primary curriculum.

- a. Enter the appropriate value in the **Priority** field (1).
- b. Enter the appropriate value in the **Type** field (MAJOR).
- c. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Majors/Departments** from the list and then select a code.
 - The **Department** field will automatically be filled in.
 - **Save**.

6. If applicable, update the applicant's concentration in the Field of Study tab for the primary curriculum.

- a. Select **Record > Insert** (F6 key).
- b. Enter the appropriate value in the **Priority** field (1).
- c. Enter the appropriate value in the **Type** field (CONCENTRATION).
- d. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Concentrations** from the list and then select a code.
 - The **Department** field will be left blank.
- e. **Save**.

7. Update the applicant's secondary curriculum in the Curriculum tab.

- a. Click on the **Curriculum** tab.
- b. Select **Record > Insert** (or F6)
- c. Enter 2 in the **Priority** field to denote secondary curriculum. If no previous secondary program existed, it will default to 2 but if not, be sure to change it to 2. Click the down arrow button for the new **Program** field (e.g. BED-BSC).
- d. Select **Change Curriculum** from the list.
- e. The message "Base Curriculum Items will be Replaced" appears.
- f. Click **OK**.

- g. Select a program from the list. The following fields will be filled:
Program, Level, College, Degree.
- h. Enter the campus code or look it up using the down arrow next to the **Campus** field.
 - It is very important that you ensure the code is entered. If you neglect to add the code, you will have to repeat this procedure. Note that the campus code affects fees.
- i. **Save.**
 - Review the information you entered by going to the **Field of Study** (if you are not automatically taken there).

8. Update the applicant's major in the Field of Study tab for the secondary curriculum.

- a. Enter the appropriate value in the **Priority** field (1).
- b. Enter the appropriate value in the **Type** field (MAJOR).
- c. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Majors/Departments** from the list and then select a code.
 - The Department field will automatically be filled in.
 - **Save.**

Note that there are mandatory concentrations for some concurrent programs.

9. If applicable, enter the concentration in the Field of Study tab.

- a. Select **Record > Insert.**
- b. Enter the appropriate value in the **Priority** field (1).
- c. Enter the appropriate value in the **Type** field (CONCENTRATION).
- d. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Majors/Departments** from the list and then select a code.
 - The **Attached to Major** field is automatically filled in. The **Department** field remains blank.
- e. **Save.**

10. Verify that the changes have been made.

- a. Click on the **Application** tab to verify that the changes have been made.

Note: The scroll bar should indicate multiple records. Scroll through to verify that both the Primary and secondary programs are listed appropriately.

Example 3: Making a major change to a current application

Scenario

The applicant originally applied for freshman, but it should be undeclared. You will have to modify the major for the applicant's program.

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate the application that needs to be updated.
- Access the **Curricula** tab and locate the program that needs to be updated in the **Curriculum** tab.
- Update the applicant's major information in the **Field of Study** tab.
- Enter attribute information in the **Contacts, Cohorts, Attributes** tab.
- Verify that the changes have been saved.

Procedure

1. **Access SAAADMS and enter the McGill ID.**
 - a. Check the **View Current/Active Curricula** box to only see current and active admission applications.
 - b. **Next Block.**
2. **Locate the application that needs to be updated.**
 - a. In the **Application** tab, locate the **Application Number** that needs to be updated.
 - b. Update information on the left, if required. **DO NOT UPDATE INFORMATION IN APPLICATION STATUS OR APPLICATION DECISION FIELDS.**
 - c. View the current academic program information for the selected application in the **Curricula Summary** and the **Field of Study Summary** blocks. These blocks are read-only.

- Note that a value of 1 in the **Priority** field of the **Curricula Summary** block refers to a primary curriculum.
- Note that a value of 2 in the **Priority** field of the **Curricula Summary** block refers to a secondary curriculum, if valid.

3. Access the Curricula tab, and in the Curriculum tab, locate the program that needs to be updated. (Use the scroll bar, if necessary.)

Note that the **Curricula** tab is composed of two sub-tabs: One of the tabs is called **Curriculum**, the other is **Field of Study**.

4. Update the applicant's major information in the Field of Study tab.

- a. Click on the **Field of Study** tab.
- b. Locate the record for the major that needs to be updated.
- c. Select **Record > Insert**.
- d. Enter the appropriate value in the **Priority** field (1).
- e. Enter the appropriate value in the **Type** field (MAJOR).
- f. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Majors/Departments** from the list and then select a code.
 - The **Department** field will automatically be filled in.
 - **Save**.
 - The record for the previous major will now have **Current** field = N. You can only see this if the **View Current /Active Curricula** box is not checked.

5. Enter attribute information in the Contacts, Cohorts, Attributes tab.

- a. Click on the **Contacts, Cohorts, Attributes** tab.
- b. Enter the **Attribute** field in the third block.
- c. **Save**.

6. Verify that the changes have been made.

- a. Click on the **Application** tab to verify that the changes have been made.

Note: BA Freshman requires a mandatory concentration.

Example 4: Making an attached concentration change to a current application

Scenario

A BSC-BED applicant wants to change his/her concentration. You will have to change the attached concentration for the primary and/or secondary program.

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate the application for the program that needs to be updated.
- Access the Curricula tab for the primary curriculum and locate the program that needs to be updated.
- Update the applicant's concentration information in the Field of Study tab.
- Verify that the changes have been saved.

Procedure

- 1. Access SAAADMS and enter the McGill ID.**
 - a. Check the **View Current/Active Curricula** box to restrict current and active admission applications.
 - b. Next Block.**
- 2. Locate the application for the program that needs to be updated.**
 - a. In the **Application** tab, locate the **Application Number** that needs to be updated.
 - b. Update information on the left, if required. **DO NOT UPDATE INFORMATION IN APPLICATION STATUS OR APPLICATION DECISION FIELDS.**
 - c. View the current academic program information for the selected application in the **Curricula Summary** and the **Field of Study Summary** blocks. These blocks are read-only.
 - Note that a value of 1 in the **Priority** field of the **Curricula Summary** block refers to a primary curriculum.
 - Note that a value of 2 in the **Priority** field of the **Curricula Summary** block refers to a secondary curriculum, if valid.
- 3. Access the Curricula tab, and in the Curriculum tab, locate the program that needs to be updated.** (Use the scroll bar, if necessary.)



Note that the **Curricula** tab is composed of two sub-tabs: One of the tabs is called **Curriculum**, the other is **Field of Study**.

4. Update the applicant's attached concentration information in the Field of Study tab.

- a. Click on the **Field of Study** tab.
- b. Locate the record for the concentration that needs to be updated.
- c. Select **Record > Insert**.
- d. Enter the appropriate value in the **Priority** field (1).
- e. Enter the appropriate value in the **Type** field (CONCENTRATION).
- f. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Concentrations** from the list and then select a code (e.g. Undeclared).
 - The **Attached to Major** field is automatically filled in. The Department field remains blank.
 - **Save**.
 - The record for the previous concentration will now have **Current** field = N.

Note that you may also have to change the concentration for the secondary curriculum. The same steps apply.

5. Verify that the changes have been saved.

- a. Click on the **Application** tab to verify that the changes have been made.

Adding an application(s) to an existing one

Example 5: Creating a new application for the same term as the existing one.

Scenario

The applicant already has an undergraduate admissions application record for term 201009. The applicant wants to add another program choice.

We need to create a new application for the same term by duplicating an application. Then we need to add another program choice to this new application. This does not get rid of the original application, but simply adds another application for the same term.

Because you are duplicating an application, you need to update source, attribute and admit school information.

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate the application for the primary curriculum that needs to be updated.
- Create a new application in the **Application** tab in the same term.
- Access the **Curricula** tab.
- Update the applicant's primary curriculum program in the Curriculum tab. Take note of information in other tabs.
- Update the applicant's major in the **Field of Study** tab.
- If applicable, enter the concentration in the **Field of Study** tab.
- If applicable, delete the secondary curriculum from the previous program choice.
- Verify that the changes have been made.
- Enter source information in the **Sources, Interests, Comments** tab.
- Enter **Received Date** (CGP1 or OUAC) in the **Checklist** tab.
- Enter attribute information in the **Contacts, Cohorts, Attributes** tab.
- Enter admit school information in SOASUPL.
- Update imaged document indexes in AX Document Manager.

Procedure

1. **Access SAAADMS and enter the McGill ID.**
 - a. Ensure that no term is defaulted in the **Term** field of the key block.

- It is very important to make sure catalog terms match.
- b. Check the **View Current/Active Curricula** box to restrict the view to current and active admission applications.
- c. **Next Block.**

2. Locate the application for the primary curriculum that needs to be updated.

- a. In the **Application** tab, locate the **Application Number** that needs to be updated.
- b. Update information on the left, if required. DO NOT UPDATE INFORMATION IN APPLICATION STATUS OR APPLICATION DECISION FIELDS.
- c. View the current academic program information for the selected application in the **Curricula Summary** and the **Field of Study Summary** blocks. These blocks are read-only.
 - Note that a value of 1 in the **Priority** field of the **Curricula Summary** block refers to a primary curriculum.
- d. Click on the **Sources, Interests, Comments** tab and take note of the value for the **Background Institution** field in the **Sources** block.
- e. Click on the **Checklist** tab and if there are any entries for **Admission Request** (CGP1 or OUAC), take note of their **Received Date**.
- f. Click on the **Contacts, Cohorts, Attributes** tab and take note of the **Attribute** field.
- g. Go to the SOASUPL form for the application and take note of the **Admit School** field.

3. Create a new application in the Application tab in the same term.

- a. Click on the **Application** tab.
- b. Select **Record > Insert** (F6 key).
- c. Select **Record > Duplicate** (F4 key).
- d. **Save.**
 - A new **Application Number** is created.

4. Access the **Curricula** tab.

Note that the **Curricula** tab is composed of two sub-tabs: One of the tabs is called **Curriculum**, the other is **Field of Study**.

5. **Update the applicant's primary curriculum in the Curriculum tab.**

- a. **New to Banner Version 8:** Select the Duplicate icon in the center. This will duplicate the current program while maintaining the same priority. Proceed to step 'c'.
- b. Alternatively, you may Select Record > Insert (F6 key) to insert a new curriculum record, but this will change the priority to the next available number, which will need to be changed back to priority 1 in the case of a primary curriculum or a 2 if it is the secondary program of a valid dual program.

 Note	If caution is not exercised, a new secondary or tertiary program may be created which Banner will not recognize as invalid. Consequently, the original program choice will remain the active program and the changes will not have the intended effect of replacing the prior choice.
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- c. On the Program field, click the down arrow to select the program the applicant wishes to add for this new application.
 - Select **Change Curriculum** from the list.
 - The message “Base Curriculum Items will be Replaced” appears.
 - Click **OK**.
 - Select the applicant's program choice from the list.
 - The following fields will be filled: **Program, Level, College, Degree**.
- d. Enter the campus code or look it up using the down arrow next to the **Campus** field.
 - It is very important that you ensure the code is entered. If you neglect to add the code, you will have to repeat this procedure. Note that the campus code affects fees.
- e. **Save** your changes. You may be brought to the **Field of Study** tab. If not, click on it to verify it.

6. **Update the applicant's major in the Field of Study tab.**

- a. Enter the **Priority** field: 1
- b. Enter or look up the **Type** field: MAJOR

- c. Using the down arrow next to the **Field of Study** field:
 - Select **Attached Majors/Departments** from the **Option** List. Select a code from the list.
 - The **Department** field will automatically be filled in.
 - **Save.**

7. If applicable, enter the concentration in the Field of Study tab.

- a. Select **Record > Insert** (F6 key).
- b. Enter the appropriate value in the **Priority** field (1).
- c. Enter the appropriate value in the **Type** field (CONCENTRATION).
- d. Look up the **Field of Study** field.
 - Select Attached **Majors/Concentrations** from the list and then select a code.
 - The **Attached to Major** field is automatically filled in. The **Department** field remains blank.
 - **Save.**

8. If applicable, delete the secondary curriculum from the previous program choice.

9. Verify that the changes have been made.

- a. Click on the **Application** tab to verify that the changes have been made.

Note: Do not forget that if the new application is for a concurrent program, you must enter the secondary curriculum. Repeat **Step 7 through Step 10** in Example 2 to add the secondary curriculum.

10. Enter source information in the Sources, Interests, Comments tab.

- a. Click on the **Sources, Interests, Comments** tab.
- b. Enter the **Background Institution** field (from Step 2d).
- c. **Save.**

11. Enter Received Date for CGP1 and OUAC in the Checklist tab.

- a. Click on the **Checklist** tab.

- b. Enter the **Received Date** field for **Admission Requests** (CGP1 or OUAC from Step 2e).

c. **Save.**

12. Enter attribute information in the Contacts, Cohorts, Attributes tab.

- a. Click on the **Contacts, Cohorts, Attributes** tab.

- b. Enter the **Attribute** field (from Step 2f).

c. **Save.**

13. Enter admit school information in SOASUPL.

- a. Select **File > Direct Access** (F5 key).

- b. In the **Go To** field, type SOASUPL and press Enter.

c. **Next Block.**

- d. Enter the **Admit School** field (from Step 2g).

e. **Save.** Exit SOASUPL.

NOTE: If you neglect to do Steps 10 to 13:

- this will be reflected in the Admissions error report.

14. Enter Application Extender imaging information.

Open each of the documents relevant to the new application and create new indexes attaching them to the new application number you have just created.

NOTE: If you neglect to do Step 14:

- This will be reflected in the Imaging error report (does not apply to the School of Continuing Studies; they must update the checklist manually).

Deferring an accepted application with an offer of admission

Example 6: Duplicating an application to a future Term for deferrals.

Scenario

The applicant already has been accepted to a program for Term 201009. The applicant wants to defer the application to a future Term. You will have to duplicate the application to a future Term. The **Catalog Term** field will also need to be duplicated. A deferral decision should already have been entered on SAADCRV. (See Admissions Decision How to document.)

Process

You will need to:

- Access the SAAADMS form and enter the McGill ID.
- Locate application that needs to be duplicated in the **Application** tab. Take note of information in other tabs.
- Duplicate the application to be deferred in the Application tab.
- Access the **Curricula** tab.
- Update the **Catalog Term** in the **Curricula** tab.
- Update the **Catalog Term** for the major in the **Field of Study** tab.
- If applicable, update the **Catalog Term** for the concentration in the **Field of Study** tab.
- If a secondary program exists, update **Catalog Term** for the secondary program.
- Verify that the changes have been saved.
- Enter source information in the **Sources, Interests, Comments** tab.
- Enter **Received Date** for CGP1 and OUAC in the **Checklist** tab.
- Enter attribute information in the **Contacts, Cohorts, Attributes** tab.
- Enter admit school information in SOASUPL.
- Enter Application Extender information.
- Add the admission decision in SAADCRV.
- Update imaged document indexes in AX Document Manager.

Procedure

1. **Access SAAADMS and enter the McGill ID.**
 - a. Ensure that no term is defaulted in the **Term** field of the key block.



- This step is very important because if you neglect to do this, the new application will have the wrong term.
- b. Check the **View Current/Active Curricula** box to only see current and active admission applications.
- c. **Next Block.**

2. Locate application that need to be duplicated in the Application tab.

- a. If necessary, use the scroll bar to locate the application that needs to be duplicated. Ensure that **Application Decision** is Deferral Granted (note the **Term** and **Application Number** fields).
- b. Click on the **Sources, Interests, Comments** tab and take note of the value for the Background Institution field in the Sources block.
- c. Click on the Checklist tab and if there are any entries for **Admission Request** (CGP1 or OUAC), take note of their **Received Date**.
- d. Click on the **Contacts, Cohorts, Attributes** tab and take note of the **Attribute** field.
- e. Go to the SOASUPL form for the application and take note of the **Admit School** field.

3. Duplicate the application to be deferred in the Application tab.

- a. Select **Record > Insert** (F6 key).
- b. Enter the new **Entry Term**: the term the application is being deferred to (IT IS VERY IMPORTANT TO DO THIS AT THIS STAGE).
- c. Select **Record > Duplicate** (F4 key).
- d. **Save.**

4. Access the Curricula tab.

- a. Click on the **Curricula** tab.
 - On the **Curriculum** tab, the **Term** field has been updated. However, the **Catalog** term field needs to be updated.

5. Update the Catalog Term in the Curricula tab.

- a. Select **Record > Insert** (F6 key).

- b. Select **Record > Duplicate** (F4 key). Verify the Priority field is 1.
- c. Change the Catalog Term in the new record to the deferred term. The **Term** and **Catalog Term** should now match.
- d. **Save.**

6. Update the Catalog Term for the major in the Field of Study tab.

- a. Click on the **Field of Study** tab. The information has been updated for the deferred Term.
- b. The **Catalog Term** for the major has to be updated to reflect the deferred term.
 - Select **Record > Insert** (F6 key).
 - Select **Record > Duplicate** (F4 key).
 - Update the **Catalog Term** field: the term deferred to
 - **Save.**

7. If applicable, update the Catalog Term for the concentration in the Field of Study tab.

- a. The **Catalog** term for the concentration has to be updated to reflect the deferred term.
 - Select **Record > Insert.**
 - Select **Record > Duplicate.**
 - Enter the **Catalog Term** field: the term deferred to
 - **Save.**

8. If a secondary program exists, you will have to repeat steps 5 through 7 for the secondary program.

9. Verify that the changes have been made.

- a. Click on the **Application** tab to verify that changes are made.

10. Enter source information in the Sources, Interests, Comments tab.

- a. Click on the **Sources, Interests, Comments** tab.
- b. Enter the **Background Institution** field (from Step 2b).
- c. **Save.**

11. Enter Received Date for CGP1 and OUAC in the Checklist tab.

- a. Click on the **Checklist** tab.
- b. Enter the **Received Date** field for Admission Requests **CGP1** or **OUAC** (from Step 2c).
- c. **Save.**

12. Enter attribute information in the Contacts, Cohorts, Attributes tab.

- a. Click on the **Contacts, Cohorts, Attributes** tab.
- b. Enter the **Attribute** field (from Step 2d).
- c. **Save.**

13. Enter admit school information in SOASUPL.

- a. Select **File > Direct Access** (F5 key).
- b. In the **Go To** field, type SOASUPL and press Enter.
- c. **Next Block.**
- d. Enter the **Admit School** field (from Step 2e).
- e. **Save.**

NOTE: If you neglect to do Steps 10 to 13, this will be reflected in the Admissions error report.

14. Enter Application Extender imaging information.

- a. Open each of the documents relevant to the new application and create new indexes attaching them to the new application number you have just created.

If you neglect to do Step 14, this will be reflected in the Imaging error report (does not apply to the School of Continuing Studies; they must update the checklist manually).

15. Add the admission decision in SAADCRV.

- a. Access SAADCRV and enter the decision.
- b. **Save.**

Help Resources, Support, and more....

Do you need help in getting into Minerva or Banner? Is the system acting strangely? Do you need help on how to use a menu or form, or how to resolve a data entry error? Or is your question about departmental policy or specific data requirements?

Help with Minerva or Banner

If you have trouble accessing or using Minerva or Banner, or want to access the Banner Documentation Index, go to <https://www.mcgill.ca/inb>

IT Service Desk

You can also contact the IT Service Desk at 514-398-3398.

