LSAC. Unite™

The Close Cycle Process (overview)

Stage = Prospect

Keep Active, Archive or Delete?

Options	Suggestions
Do you plan to contact this person in the new application cycle?	**Keep the Person active.** The person remains eligible to receive emails from your school.
Is this someone you may want to engage with in the future?	**Archive the Person.** If they are brought in next cycle through CRS, they will be automatically 'unarchived'.
Was this a lead in whom your school has no further interest?	**Delete the Person.** The person record is permanently deleted.

![LSAC Unite logo]

Stage = Applicant OR Matriculant

Step 1: Close Applications

Do Applications have a Final Status? (Admitted, Denied, Previous Deny, Withdraw during Review, Pending Matriculation, Matriculated or Application Incomplete)

      YES: Proceed to **Close**

      NO: Update the Final Status, then **Close**

How to Close Applications	**Result**
On the Applications tab, select **Action / Close**	**Person Record** • Person <u>Stage</u> is now: **Matriculated** OR **Prospect.** • Person <u>Status</u> is now: **Previous Admit** OR **Previous Applicant.** • Application is on the 'closed' tab In Unite.
	Reports By default, people with closed applications are included in Export Reports.

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Stage = Applicant OR Matriculant

Step 2-a: Partial Delete *(optional)*

Do you want to delete parts of the Application?
>   **YES:** Select Components to Delete
>   **NO:** Proceed to Archive (Step 3)

How to Delete

On the Applications / Closed Year tab, search for applications to modify. Select **Action/Delete**.

Select data for deletion: Financial Aid, Notes, Recommendations, Scholarships, Documents (CAS, Eapp, School), Review Data, UDFs

Result

Application
The selected data is **permanently** deleted.

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Stage = Applicant OR Matriculant

Step 2-b: Partial Delete *(optional)*

Do you want to delete parts of the Person Record?
> **YES:** Select Components to Delete
> **NO:** Proceed to Archive (Step 3)

How to Delete

On the People tab, search for records to modify. Select **Action/Delete**.

Select data for deletion: Ethnicity, SSN, Notes, Special Interests, Documents, User Defined Fields

Result

Person Record
The selected data is **permanently** deleted.

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Stage = Applicant OR Matriculant

Step 3: Archive Records

Are all Applications Closed?
     YES: Proceed to **Archive.**
     NO: See Step 1

TIP: If a Person's status is 'Deferred', LSAC recommends keeping their record active (not archived).

How to Archive

On the People tab, search for and select the records you want to archive.

Select **Action / Archive**.

Results

Person Record
- Gray shading identifies an archived record.
- The record can be 'unarchived'.
- By default, archived records do not appear in searches. You can use the 'include Archives' checkbox.

Reports
- Export reports: Add the 'Person Archived Flag' to a condition to obtain archived records.

Stage = Applicant OR Matriculant

Applicant Stage & Status upon Closing

Pre-closing Stage & Status	Post-closing Stage & Status
Stage: Applicant **Status**: Admitted	**Stage:** Prospect **Status**: Previous Admit
Stage: Applicant **Status**: Application Incomplete, Withdraw during Review, Denied	**Stage:** Prospect **Status:** (*same as before closing*)
Stage: Applicant **Status**: Pending Matric or Matriculated	**Stage:** Matriculated **Status:** (*same as before closing*)

Unarchiving

Archived records are automatically 'unarchived' when an archived person is included in a Candidate Referral Service query or has an application flow into Unite.