

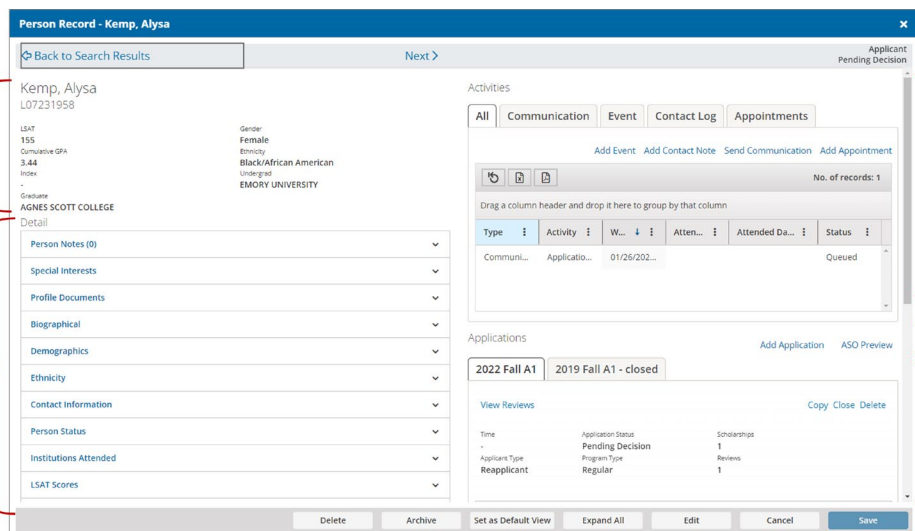
Unite Education Program v9.0  
 Job Aid: 4083

## Considerations for Placing User-defined Fields

Unite provides flexibility to add user-defined fields on the person record, the application record, and the reviewer *Evaluation* window. Permissions, along with where you place UDFs, impact how users work with your unique data in Unite.

### UDFs for Person Records

Instead of having a prospect record and an applicant record, each person in Unite has one person record. As shown in the image below, there are five main areas on a person record – a person summary, person detail with many expandable and collapsible sections, an activity log, an applicant menu, and an area where application records display.



**Person Record - Kemp, Alysa**

Back to Search Results      Next >      Applicant: Pending Decision

**Person summary**

Kemp, Alysa  
 L07231958

LSAT: 155      Gender: Female  
 Cumulative GPA: 3.44      Ethnicity: Black/African American  
 Home: -      Undergrad: EMORY UNIVERSITY  
 Graduate: -

AGNES SCOTT COLLEGE

**Person detail with expandable and collapsible sections**

Detail

- Person Notes (0)
- Special Interests
- Profile Documents
- Biographical
- Demographics
- Ethnicity
- Contact Information
- Person Status
- Institutions Attended
- LSAT Scores

**Activity log**

Activities

All    Communication    Event    Contact Log    Appointments

Add Event    Add Contact Note    Send Communication    Add Appointment

Drag a column header and drop it here to group by that column

Type	Activity	W...	Atten...	Attended Da...	Status
Communi...	Applicatio...	01/26/202...			Queued

**Applicant menu**

Applications

2022 Fall A1    2019 Fall A1 - closed

Add Application    ASO Preview

**Application records**

View Reviews    Copy    Close    Delete

Time	Application Status	Scholarships
-	Pending Decision	1
Applicant Type	Program Type	Reviews
Reapplicant	Regular	1

Delete    Archive    Set as Default View    Expand All    Edit    Cancel    Save

There are several ways to customize person records, including the ability to add user-defined fields. The following table provides more detail about each area on a person record.

Area	Description	Customization Options
Person summary	The person summary area provides immediate insights about the person. Data comes from the person details.	You can customize which fields display in the person summary.
Person detail	The person detail area displays person record details with expandable and collapsible sections that make it easy for you and your team members to focus on the specifics about a person.	<ul style="list-style-type: none"> <li>You can add user-defined fields to most sections.</li> <li>You can drag and drop to arrange sections in any order, and then save the order as a default view.</li> </ul>
Activity log	The activity log area includes five tabs. Each tab has a grid that displays contact information. There is a grid that lists all activities associated with the person. There is a grid that lists just email messages sent to the person, a grid that lists just events associated with the person, a grid that lists just contact notes associated with the person, and a grid that lists just appointments associated with the person.	You cannot customize the activity log area on a person record, although you can sort, filter, and organize information in each grid.
Applicant menu	The applicant menu includes functions to manually add an application record to the person record and to preview what applicants see on the Application Services Online (ASO) portal.	You cannot customize the applicant menu on a person record.

Area	Description	Customization Options
Application records	The application record on a person record has a tab for each application associated with the person.	Refer to <i>UDFs for Application Records</i> in this document for information about how you can customize application records.

Most sections that have person details are customizable. However, there are four sections where you cannot add user-defined fields as described in the table below.

Section	Description
Person Notes	The <i>Person Notes</i> section is where you and your team members can record and manage administrative notes about the person. This section is not customizable.
Profile Documents	The <i>Profile Documents</i> section is where you and your team members can work with documents that are specific to the person, not just any one application. This section is not customizable, although you can sort, filter, and organize information in the grid.
Source of Data/Groupings	The <i>Source of Data/Groupings</i> section is where you and your team members can identify the source for person profile data when there is an update from a data exchange service, like a CRS query or an import. This is also where you and your team members can associate the person with one or more groupings. This section is not customizable, although you can customize which groupings are available to select.
Person/Application Data Exceptions	The <i>Person/Application Data Exceptions</i> section is where you and your team members can review and manage exceptions that may occur from imports.

## UDFs for Application Records

There are several ways to customize application records, including the ability to add user-defined fields. As shown in the image below, application records have four main parts.

The screenshot shows an application record interface. On the left, four callout boxes with red brackets point to specific areas of the interface:

- Application tabs:** Points to the tabs at the top, showing '2022 Fall A1' (active) and '2019 Fall A1 - closed'.
- Application menu:** Points to the 'View Reviews' link and the 'Copy Close Delete' actions.
- Application summary:** Points to the summary table with fields: Time (-), Applicant Type (Reapplicant), Application Status (Review In Progress), Program Type (Regular), Scholarships (-), and Reviews (1).
- Application detail with expandable and collapsible sections:** Points to a list of expandable/collapsible sections: Program, Application Documents, Application Notes (0), Completion Status, Application Status, LSAT Statistics, Employment, LOR Counts, Recommendations, Transfer/Visitor, Fees, Financial Aid, and Scholarships.

The following table provides a description for each area of an application record.

Part	Description	Customization Options
Application tabs	The application tab displays the year, term, and application type. You can also see whether the application is currently open or closed for consideration.	You cannot customize the application tabs.

Part	Description	Customization Options
Application menu	The application menu includes functions to view reviewer evaluations associated with the application, copy the application, close the application, and delete the application.	You cannot customize the application menu.
Application summary	The application summary provides immediate insights about the application. Data comes from the application details.	You can customize which fields display in the application summary.
Application detail	The application detail contains expandable and collapsible sections that make it easy for you and your team members to focus on the specifics about the application.	<ul style="list-style-type: none"> <li>You can add user-defined fields to most sections.</li> <li>You can drag and drop to arrange sections in any order, and then save the order as a default view.</li> </ul>

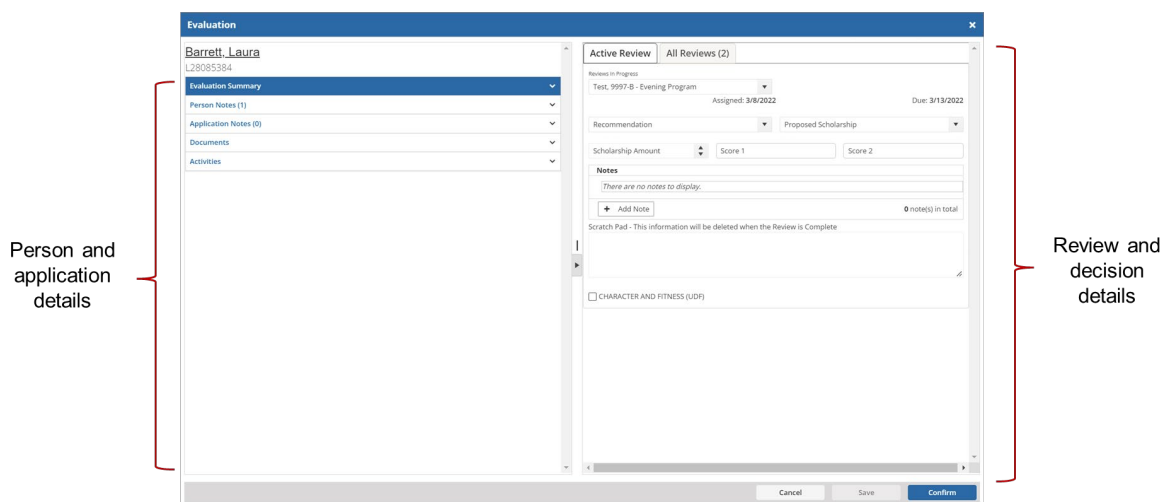
Most sections that have application details are customizable. However, there are three sections where you cannot add user-defined fields as described in the table below.

Section	Description
Application Documents	The <i>Application Documents</i> section is where you and your team members can work with documents that are specific to the application. This section is not customizable, although you can sort, filter, and organize information in the grid.

Section	Description
LOR Counts	The <i>LOR Counts</i> section is where you and your team members can manage letters of recommendation associated with the application, to include the number of letters requested and the number of letters received as well as school and signature information. This section is not customizable.
Application Notes	The <i>Application Notes</i> section is where you and your team members can record and manage administrative notes about the application. This section is not customizable.

## UDFs for Reviewer Evaluation Window

In Unite, you can see everything about an application and can complete an evaluation on the *Evaluation* window. As shown in the image below, the *Evaluation* window has two panels.



One panel displays details about the person and application. The other panel displays details about reviews and decisions associated with the application. You can hide and show the panels as needed to focus on specific details.

The panel that displays details about the person and application has five expandable and collapsible sections. The following table provides information about each section that displays

on the panel with person and application details. You can only add user-defined fields to the *Evaluation Summary* section.

Section	Description	Customization Options
Evaluation summary	The evaluation summary provides immediate insights about the person and application. Data comes from person details on the person record and application details on the application record.	You can customize which fields display in the evaluation summary.
Person Notes	The <i>Person Notes</i> section is where you and your team members can record and manage administrative notes about the person.	You cannot customize the <i>Person Notes</i> section.
Application Notes	The <i>Application Notes</i> section is where you and your team members can record and manage administrative notes about the person.	You cannot customize the <i>Application Notes</i> section.
Documents	The <i>Documents</i> section is where you and your team members can work with documents that are specific to the person and the application.	You cannot customize the <i>Documents</i> section, although you can sort, filter, and organize information in the grid.

Section	Description	Customization Options
Activities	The <i>Activities</i> section is where you and your team members can see a record of all contacts associated with the person, including sent email messages, events, and contact notes. Data comes from the activity log on the person record.	You cannot customize the <i>Activities</i> section, although you can sort, filter, and organize information in the grid.

The panel that displays details about reviews and decisions associated with the application has up to five tabs depending on how far the application has progressed through the admissions cycle. The following table provides a description for each tab.

Tab	Description	Customization Options
Active Review	The <i>Active Review</i> tab is where you select a recommendation for the application, recommend a scholarship, and add notes about your evaluation. This tab displays for users with permissions to review applications.	You can add user-defined fields to the <i>Active Review</i> tab. Any fields you add also display on the <i>Post Decision Review</i> tab.
All Reviews	The <i>All Reviews</i> tab is where you see recommendations from other reviewers. This tab displays for users with permissions to review applications and to see recommendations submitted by other reviewers.	You cannot customize the <i>All Reviews</i> tab.



Tab	Description	Customization Options
Older Reviews	The <i>Older Reviews</i> tab is where you see recommendations from all reviewers for previous applications associated with the person. This tab displays for users with permissions to review applications and to see recommendations submitted by other reviewers.	You cannot customize the <i>Older Reviews</i> tab.
Decisions	The <i>Decisions</i> tab is where you select a decision for the application and add multiple scholarships. This tab displays for users with review administrator permissions.	You cannot customize the <i>Decisions</i> tab.
Post Decision Review	The <i>Post Decision Review</i> tab is where you select a recommendation for the application, recommend a scholarship, and add notes about your evaluation. This tab displays for users with permissions to review applications and who are assigned an application to review after a final decision is made for the application.	You can add user-defined fields to the <i>Post Decision Review</i> tab. Any fields you add also display on the <i>Active Review</i> tab.

## Example UDFs on a Person Record

When you add a user-defined field to a section on the person record, the field displays after all standard fields in the section. You cannot arrange the order in which the fields display.

The following image illustrates how a user-defined field, the **First Generation College** list box, might display in the *Special Interests* section on the person profile.

The screenshot shows the 'Special Interests' section of a person profile. The section is titled 'Special Interests' and has a blue header bar. Below the header, there is a 'CATEGORY' dropdown menu set to 'ADMISSIONS'. The form contains several fields: 'Date' (02/18/2021), 'By Whom' (George Roberts), 'Relation' (Dean Vernon Pless), and 'Letter Sent' (MM/dd/yyyy). There is also a 'Decision Letter Sent' field (MM/dd/yyyy) and a 'Notes' text area containing 'Letter from dean regarding admission'. A blue button labeled '+ Add Special Interest' is located below the form. At the bottom of the section, there is a dropdown menu labeled 'First Generation College'.

The following image illustrates how a user-defined field, the **Military Branch** list box, might display in the *Demographics* section on the person profile.

Demographics ▲

<p>Residency In State ▼</p> <p>Permanent State/Province Maryland ▼</p> <p>City of Birth Detroit</p> <p>State/Province of Birth Michigan ▼</p> <p>Country of Birth USA ▼</p> <p>Citizenship Type US Citizen ▼</p> <p>Country of Citizenship USA ▼</p> <p>Secondary Citizenship ▼</p> <p>Native Language English ▼</p> <p>Disability ▼</p> <p>County ▼</p> <p>Geographic Preference No Preference ▼</p>	<p><input type="checkbox"/> Hispanic/Latino</p> <p>Tribal Affiliation</p> <p>Enrollment No. (tribal affiliation)</p> <p>Current Employment Part-time ▼</p> <p>Years of FT Employment 2 - 4 Years ▼</p> <p>Yrs. of Emp. Post Law Degree ▼</p> <p><input type="checkbox"/> Currently Working as a Lawyer</p> <p><input type="checkbox"/> Religious Affiliation</p> <p><input type="checkbox"/> LGBT Status</p> <p><input type="checkbox"/> Licensed to Practice Law</p> <p><input checked="" type="checkbox"/> Military Service</p> <p><input type="checkbox"/> Citizen of Other Country</p>		
<div style="border: 1px solid #ccc; padding: 5px;"> <p style="margin: 0;">INTERNATIONAL</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> <p>Visa Type ▼</p> <p>Visa Number</p> <p>Visa Status ▼</p> <p>Passport Name</p> <p><input type="checkbox"/> Internationally Educated</p> <p><input type="checkbox"/> Visa Granted</p> </td> <td style="width: 50%;"> <p>SEVIS Number</p> <p>SEVIS First (Given) Name</p> <p>SEVIS Middle Name</p> <p>SEVIS Last Name</p> <p>TOEFL/IELTS Score -</p> <p>Self Rpted # of Times Taken</p> </td> </tr> </table> </div>		<p>Visa Type ▼</p> <p>Visa Number</p> <p>Visa Status ▼</p> <p>Passport Name</p> <p><input type="checkbox"/> Internationally Educated</p> <p><input type="checkbox"/> Visa Granted</p>	<p>SEVIS Number</p> <p>SEVIS First (Given) Name</p> <p>SEVIS Middle Name</p> <p>SEVIS Last Name</p> <p>TOEFL/IELTS Score -</p> <p>Self Rpted # of Times Taken</p>
<p>Visa Type ▼</p> <p>Visa Number</p> <p>Visa Status ▼</p> <p>Passport Name</p> <p><input type="checkbox"/> Internationally Educated</p> <p><input type="checkbox"/> Visa Granted</p>	<p>SEVIS Number</p> <p>SEVIS First (Given) Name</p> <p>SEVIS Middle Name</p> <p>SEVIS Last Name</p> <p>TOEFL/IELTS Score -</p> <p>Self Rpted # of Times Taken</p>		
<p>Military Branch Air Force ▼</p>			

## Example UDFs on an Application Record


When you add a user-defined field to a section on the application record, the field displays after all standard fields in the section. You cannot arrange the order in which the fields display. The following image illustrates how a user-defined field, the **Special Program** list box, might appear in the *Program* section on an application tab.


The image shows a screenshot of a web application interface for a 'Program' section. The section is titled 'Program' in a blue header bar. Below the header, there are several fields organized into sections:


- Year/Term/Application Type**: A dropdown menu showing '2021 Fall A1' and a 'Reactivated From' dropdown menu.
- Degree**: A dropdown menu showing 'JD' and a 'Coursework' dropdown menu.
- Type**: A dropdown menu and a 'Location' dropdown menu.
- Time**: A dropdown menu and a text input field for 'LS Tracking No.'.
- Applicant Type**: A dropdown menu showing 'Reapplicant' and a text input field for 'University ID'.
- Special Program**: A dropdown menu showing '3 + 3 Program'.

The following image illustrates how two user-defined fields, the **Invited for Interview** check box, and the **Interview Complete** check box, might appear in the *Completion Status* section on an application tab.


### Completion Status ▲

Date Applied  
02/17/2021 

Report Received  
MM/dd/yyyy 

File Completed  
MM/dd/yyyy 

Application Source ▼

Report Requested  
MM/dd/yyyy 

CAS Report Status  
-

Invited for Interview

Interview Complete

Resume

LORs

Final Transcript

Application Fee

Application Signed

Personal Statement

Misconduct

Report Request Authorized

LSAT Waiver

LSAT Waiver Reason

Writing Sample

## Example UDF on the Reviewer Evaluation Window

When you add a user-defined field to the *Evaluation* window, the field displays after all standard fields on the *Active Review* tab. The following image illustrates how a user-defined field, the **Letter of Continued Interest Received** check box, might display on the reviewer *Evaluation* window.

The screenshot displays the 'Active Review' tab of a reviewer evaluation window. At the top, there are two tabs: 'Active Review' and 'All Reviews (1)'. Below the tabs, the 'Reviews In Progress' section shows a dropdown menu with 'Thatcher, Zeta-Susan' selected. To the right of the dropdown, it says 'Assigned: 9/15/2020' and 'Due: 9/20/2020'. Below this, there are two dropdown menus: 'Recommendation' and 'Proposed Scholarship'. Underneath these are two input fields: 'Scholarship Amount' with a vertical spinner, 'Score 1', and 'Score 2'. A 'Notes' section follows, with the text 'There are no notes to display.' and a '+ Add Note' button. To the right of the button, it says '0 note(s) in total'. Below the notes is a 'Scratch Pad' area with the text 'This information will be deleted when the Review is Complete' and a large empty text area. At the bottom of the window, there is a checkbox labeled 'Letter of Continued Interest Received'.

## Related resources

- 5604 – Add a User-Defined Field to Unite