

# Admissions Enrollment Funnel

Student Status Phases	Responsible Party	Actions	Data Collection/Entry
<p><b>Prospects</b> Student names purchased and UMS reaches out to prospective students.</p>	<p><b>Enrollment Management:</b></p> <ul style="list-style-type: none"> <li>• Admissions Recruiting</li> <li>• Admissions Counseling</li> <li>• Admissions Processing</li> </ul>	<p><b>Admissions Counselors</b> collect prospect data from college fairs, school visits, etc. <b>Admissions Processing</b> reviews data and enters/updates prospects in CRM.</p>	<p>SAT (or other vendor) name-buy; input into CRM (e.g., TargetX, Salesforce)</p>
<p><b>Inquiries</b> Student reaches out to any UMS institution in any way and becomes an inquiry.</p>		<p>Prospects may be manually upgraded to inquiries after increased contact with institution.</p>	<p>Updated to inquiry in CRM (e.g., TargetX, Salesforce)</p>
<p><b>Applicants</b> Student submits an application to the UMS and becomes an applicant.</p>	<p><b>Shared Processing Center Enrollment Management:</b></p> <ul style="list-style-type: none"> <li>• Communications</li> <li>• Admissions Processing</li> </ul>	<p><b>Shared Processing</b> handles Common, Paper and System Apps. <b>Enrollment Management</b> converts all other apps to digital file formatted for Shared Processing to enter into ImageNow &amp; MaineStreet. <b>Admissions Processing</b> staff reviews applications for accuracy, documents required, and missing information. If supporting info is needed, missing information requests (for transcripts, essays, test scores, etc.) are sent.</p>	<p>Common App, System or other Online/ Mobile App, Paper App and many other types of applications are received. Management via MaineStreet&gt;CSPRD&gt; Student Admissions &gt; Application Entry and from there updated in the following screens: &gt;Education and Test Results; and in &gt;Personal Information &gt;Residency</p>
<p><b>Completed Applicants</b> Student has supplied additional information as needed and is considered a completed applicant.</p>	<p><b>Enrollment Management:</b></p> <ul style="list-style-type: none"> <li>• Admissions Processing</li> <li>• Admissions Counseling</li> </ul>	<p>Complete applications are referred to <b>Admissions Counselors</b> (or similar) to admit, deny, refer to a different institution, or hold for additional information.</p>	<p>MaineStreet &gt; Enterprise Applications &gt; CSPRD &gt; Campus Community&gt; Checklists &gt; Person Checklists &gt; Checklist Management - Person</p>
<p><b>Admitted/Accepted</b> Student has been accepted to a UMS institution and becomes an admitted/accepted student</p>		<p><b>Admissions Processing</b> receives counselor decisions, updates students in MaineStreet and Early Financial Aid and sends decision letters with Merit Scholarship offer.</p>	<p>Entered in MaineStreet &gt; CSPRD &gt; Student Admissions &gt; Application Maintenance&gt;Maintain Applications and supporting documents are scanned and uploaded to ImageNow</p>
<p><b>Confirmed/Matriculated</b> Student has completed a form indicating confirmation of their acceptance and has paid a deposit, if required. Student is then considered confirmed/matriculated</p>	<p><b>Bursars/Student Finance Office Enrollment Management:</b></p> <ul style="list-style-type: none"> <li>• Admissions Processing</li> <li>• Admissions Counseling</li> </ul>	<p><b>Admissions Counselors</b> receive phone calls, online form, or paper form from students to confirm their enrollment. Once deposit is received, student is considered Confirmed/ Matriculated. For UMA and International students, form is confirmation. International students (not online) require additional financial and visa info prior to enrolling.</p>	<p><b>Bursars or other student finance offices</b> collect online payments <b>Admissions Processing</b> accepts mailed or presented checks and sends to finance office. International students are sent <a href="#">Form I-20, "Certificate of Eligibility for Nonimmigrant Student Status."</a></p>
<p><b>At this point, Enrollment Management is no longer able to edit via Application Maintenance. The student is converted to the Student Program/Plan Stack and all changes are created by Registrars. Each student has their own stack.</b></p>			
<p><b>Enrolled</b> Student enrolls in classes and is considered enrolled.</p>	<p><b>Enrollment Management, student's academic department, Student Advising</b></p>		