Create and Offboard Admissions Counselors

APPROVER

Workday Student

This tip sheet explains the process for creating and offboarding admissions counselors. It is intended for Administrators.

To complete this task in workday, follow these steps:

Creating admissions counselors in Workday involves establishing them as workers within the HCM module and assigning them appropriate security roles for Student Admissions. This allows them to manage recruitment, applicant pools, and prospect communication.

Creating Admissions Counselors

1. Access the **Create Admissions Counselor** task.
2. Select the **Person Type**.
   - If the individual does not have a Workday account, select **Create New Person**.
   - If the individual is already in the system, select **Use Existing Worker**.
3. Specify the **Type**.
4. In the **Type** field, select either:
   - **Staff** for new or existing staff members.
   - **Guest** for temporary access.
5. Set **Active Dates** (applicable to Guest Admission Counselor setup only):
   - Enter a **Start Date** and **End Date** to define the period the admissions counselor will be active.

Note: Ensure the admissions counselor is assigned to campaigns and events that conclude on or before the end date.

6. Select **Academic Unit**.
7. Choose the **Academic Unit** where the admissions counselor will have permission to view.
8. Enter **Personal Information** (if creating a new person).
   - Provide the name and contact details of the new admissions counselor.

9. Select **Submit**.

Note: Workday automatically assigns the admissions counselor to the **All Admissions Counselors** and **Admissions Counselor as Self** security groups.

10. Use the **Find Admissions Counselor** report to access the admissions counselor's profile.

Offboarding and Inactivating an Admissions Counselor

It is possible to inactivate or offboard an Admission Counselor. View the following information to determine the best action:

Offboarding (Terminating) an Admission Counselor

- **Process**: Managers initiate a voluntary or involuntary termination in Workday.
- **Best For**: When the employee is leaving the company permanently.

1. Access the Remove Admissions Counselor Task.
2. Choose the person you want to remove.
3. Select **Ok**.
4. Mark the **Confirm** checkbox > Select **Ok**.

Inactivating an Admission Counselor

- **Process:** Often triggered by a **Leave of Absence (LOA)** or a manual status change.
- **Best For:** Short-term leave or when the employee is not working but is still employed.

Note: Before offboarding an admission counselor, it is important to note that you need to ensure that the Admission Counselor does not have any student prospect, student recruiting, or application grouping/pool assignments. To check assignments: Access the **Find Admission Counselor** report and search for their Admission Counselor profile. Then take appropriate action based on that information.