Manually Assign an Application Action Item

STAFF

Workday Student

This tip sheet explains the process for manually assigning action items to a student applicant's record. It is intended for Staff.

Action items are tasks applicants must complete as part of their application, such as paying a fee or submitting a transcript. These can be assigned automatically, as part of a business process, or manually. These application action items can only be added pre-matriculation when the student is still in an applicant status.

Manually assigning application action items is completed using the Assign Application Action Item Task in Workday.

Manual Assignment

To complete this task in workday, follow these steps:

1. Visit the Workday tenant and enter ***Assign Application Action Item*** in the Search box.
2. Select the **Assign Application Action Item** task from the results. The Assign application action item box will populate on the screen.
3. Enter the **Student Prospect** name > Select **OK**.
4. The **Assign Application Action Item** box will populate on the screen.
   - The Category should reflect **Admissions**.
   - Enter the Action Item by selecting the appropriate Academic Unit and choosing the Action Item.
   - Enter the Associations by selecting **Application**.
   - The **Applies To** option will require the appropriate application selection.

Note: More than one application may exist for the selected student prospect; ensure that the appropriate application record is selected

- The **Process Delay** indicator is highly recommended because it identifies which student process is delayed until the required item is completed.

5. Select **All** and then the appropriate delay indicated below:(Below are descriptions of processes commonly delayed in Assigning Application Action Items)
   - **Decision**: Prevents an admissions decision until the action item is met)
   - **Onboarding**: the student applicant received an admission decision, but will have to satisfy the required action item at the time of new student onboarding
   - **Registration Add**: The student receives an admissions decision, and their application is matriculated; however, they cannot register for courses until the required action item is completed
6. Select **OK**.
7. The **Assign Application Action Item Confirmation Screen** populates on the screen to verify the assignment.
8. Check the **Confirm box**.
9. Select **OK**. Notification of the change made populates.
10. Select **Done** to move forward.

Waive or Complete an Application Action Item

1. Login to Workday tenant and Search the **Find Student Applications** Report.
2. Select **Find Student Applications Report**.
3. Enter the student's name in the **Search box**.
4. Select the appropriate application in which the waive/complete action will be applied.

Note: More than one application may exist for the selected student prospect; ensure that the appropriate application record is selected

5. The Applicant Profile will populate. Select **Application**.
6. Select **Requirements**.
7. In the Application Action Item list, select the **Related Actions** button next to the action item in which the change will be applied. The **Actions box** will populate and put cursor over **Action Item**.
8. Select the appropriate option **Complete** or **Waive**.
   - **Complete**: Add attachments (or URL is optional) > Select **OK**.
     - A message the action was performed will populate and will reflect on the action item in the Applicant Profile.
   - **Waive**: Enter Waiver Reason (If **Other** is selected, enter note in waiver reason notes) > Select **OK**.
     - A message the action was performed will populate and will reflect on the action item in the Applicant Profile.

Note: For both, Complete and Waive, apply attachment or URL if applicable in Workday.

Send Back an Application Action Item

The Send Back Option is available in the case the applicant uploads a document to be reviewed by staff.

1. Login to Workday tenant and Search the ***Find Student Applications*** Report.
2. Select **Find Student Applications** Report.
3. Enter the student's name in the **Search box** and select the appropriate student. The **Applicant Profile** populates.
4. Select **Application**.
5. Select **Requirements**.
6. In the Application Action Item list, select the **Related Actions** button next to the action item in which the change will be applied.
7. Select **Return** > **Return Action Item**.
8. Include a **Send back message** > Select **OK**. The updated status will reflect **Returned** in Application Action Items list.