Table of Contents

Accessing the UAP .................................................................................................................. 3
  What is the Universal Advisor Portal (UAP)?........................................................................ 3
  Create a New Account ........................................................................................................... 3
  Retrieve a Forgotten Username or Password ...................................................................... 3
  Contact Support .................................................................................................................... 4

Searching for Applicants ......................................................................................................... 5

Viewing Applicant Information ................................................................................................. 6
  Designations Panel .................................................................................................................. 7
  Documents Panel .................................................................................................................... 8
  Evaluations Panel ................................................................................................................... 8
  GPAs Panel .............................................................................................................................. 9
  Standardized Test Results Panel ........................................................................................... 9
  Education Panel ...................................................................................................................... 9

Working with Lists ................................................................................................................... 10
  Creating a Field List ............................................................................................................... 10
  Creating a Composite List ...................................................................................................... 11
  Managing Lists ...................................................................................................................... 12

Working with Exports ............................................................................................................. 13
  Creating Exports .................................................................................................................... 13
  Managing Exports .................................................................................................................. 15
Accessing the UAP

What is the Universal Advisor Portal (UAP)?

The UAP is a cloud-based platform that provides health professions advisors with a centralized location to access, query, and report on individuals applying to many health professions programs. The UAP works in conjunction with WebAdMIT and was developed through:

- An analysis of existing advisor solutions.
- Consultation with the NAAHP board.
- Collaboration with a task force of NAAHP members.
- Input from health profession education associations.

To access the UAP, navigate to https://uap.webadmit.org.

Create a New Account

To create a new account, use the click here link.

Retrieve a Forgotten Username or Password

If you forgot your username or password, click the Forgot username or password? link to receive an email with further instructions. Typically, your school email address is your username.
Contact Support

The WebAdMIT Support Team is available Monday-Friday from 9:00am to 5:00pm (ET) to answer UAP-related questions:

- WebAdMIT Support Email: WebAdMITSupport@liaisonedu.com
- WebAdMIT Support Phone: 716.636.7777, option 7
Searching for Applicants

You can search for applicants who have both indicated that they attended your college or university and agreed to release their information to advisors.

1. Using the Menu Bar, open the Applicants panel, and click Search.

2. You can apply one or more filters to refine the list of search results. To apply filters, click the Show Filters button (or to hide filters, click the Hide Filters button). When you are finished entering your criteria, click Search.

Note: Each centralized application service (CAS) determines which data points are available to advisors, so your searchable fields may vary. Using the UAP, each CAS can decide:

- Whether they choose to share decisions,
- Whether they choose to share school (organization) names, and
- At what point in the cycle these items are available, if sharing.

For example, a CAS may decide to share school names at all times, but only share decision codes toward the end of a cycle.
3. The resulting list may contain some or all of the following applicant data points:
   • Name and ID
   • Email
   • Organization
   • Designations
   • Date Submitted
   • Completed Date
   • Application Status
   • Decision

Note: You can use the Sort Results button to sort your results by first name, last name, email address, or ID number.

Viewing Applicant Information

1. From your search results, click an applicant’s name to view the Applicant Details page.

2. Information appears in categorized, collapsible panels. To expand and collapse panels, click the widget.
Designations Panel

This panel displays a list of programs to which the applicant has applied, as well as key application information. Use the Details link to view additional information.

On this panel, you can view the application status for each designation. Application statuses include:

- **In-Progress**: The applicant has not yet submitted or paid for the application.
- **Received > Awaiting Materials**: The application has been submitted, but it’s missing transcripts or letters of recommendation that are required.
- **Materials Received > Verifying**: All required materials were received and the application is in line for verification and is considered complete. Once the application enters this status, it can take up to four weeks to move to the Verified status.
- **Undelivered**: An error was found in the application and it was returned to the applicant to correct.
- **Verified**: The application was processed and, if applicable, GPAs were calculated. Once an application is verified, applicants should direct any questions about its status to the programs they applied to.

By providing you with application statuses, you can monitor applicants as they progress through the application process and take any necessary actions. For example, you may choose to perform a quick search once a week for applicants who are Undelivered, then follow up with them to help resolve their application issues.
**Documents Panel**

This panel displays the date a document was received by the CAS and made available to the applicant’s designated programs. Although the actual documents are not available (based on guidance from the advisory group), the information displayed in this panel can be used to help you coach applicants through the process.

**Evaluations Panel**

This panel displays the status of an applicant’s evaluations, including the date an evaluation was received by the CAS and made available to the applicant’s designated programs.
GPAs Panel

This panel displays a set of GPAs calculated by the CAS. Note that GPA calculation categories and rules vary by CAS.

![GPA Overview](image)

Standardized Test Results Panel

This panel displays the date a test score was received by the CAS and made available to the applicant’s designated programs. Use the Details link to view the test result details. Note that due to ETS’s policy, GREs do not display.

**Note:** When reviewing this panel, keep in mind that each CAS collects different standardized test results. For example, Dentistry collects DATs, while Osteopathic Medicine collects MCATs. If you don’t see a particular test score, either the CAS does not request that it be submitted or the applicant has not reported it.

![Standardized Tests](image)

Education Panel

This panel displays the institutions the applicant listed on their application.

![Education](image)
Working with Lists

The Universal Advisor Portal allows you to group and manage applicants by common criteria. Using filters, you can return a list of applicants meeting your criteria. Lists are dynamic and update as the CAS’s applicant pool changes. Once you create a list, you can use it to generate a customized report using the Export Manager, which is explained in the next section. (Note: Lists and Exports work together. A list tells the system who you want to pinpoint and the Export Manager allows you to determine the data points you want to see for each applicant on the list.)

Using the Menu Bar, open the Applicant Lists panel, and click List Manager.

Creating a Field List

Use field lists to search for applicants using “and/or” criterion. For example, you can create a list that contains female applicants with applications in a Verified status.

From the List Manager page, click the New Field List button.

1. Name the list, select who can view it (just you or everyone at your school), and indicate if it should appear in the Menu Bar under the Applicant Lists panel (this option provides you with quick access to run the list). Then, determine if you want your query to match all or any of the rules you will subsequently establish. You can think of this as AND/OR logic, except in the UAP and = all and any = or.
2. Next, create a query by selecting a **field**, an **operator**, and **criteria** (if applicable, click the **plus and minus signs** to add or remove criteria).

3. When you are finished adding criteria, click **Submit** to populate your list. You can use the **List Actions** button to export the data.

### Creating a Composite List

Use composite lists if you need to create a more advanced search that uses multiple sets of query criteria. Specifically, composite lists allow you to combine “any” and “all” functions in one list. For example, you can create a list that contains:

- All applicants residing in a specific postal code and with a GRE status of taken, *and*
- All applicants residing outside of a specific zip code *and* with a GRE status of planned.

Before creating a composite list, follow the steps above to create the necessary Field Lists. Then, from the **List Manager** page, click the **New Composite List** button and begin customizing your new list.

1. Select the appropriate query options, including whether you want the applicant to appear in the list. You can select up to three lists.

2. When you are finished adding your criteria, click **Submit** to populate your list. You can use the **List Actions** button to export the data.

**Note:** Search queries are not case-sensitive. Additionally, when searching on numeric fields such as GPA or hours, you can only use numbers and decimals. For example, search 1000 instead of 1,000, or 3000.00 instead of 3,000.00.
Managing Lists

You can manage your lists on the List Manager page.

- To show the list on the menu bar (for quick access), select the Show on Toolbar checkbox.
- To reorder a list, use the grip icon to drag and drop the list into the preferred order.
- To modify a list, click the pencil icon. Note that only list owners can perform edits.
- To delete a list, click the remove icon.
- To export a list, click the export icon.
- To copy an existing list, click the duplicate icon.
Working with Exports

Creating Exports

The Universal Advisor Portal allows you to create a rich data file containing selected applicant and data elements. Exports are especially useful for reporting purposes. For example, you can run exports to determine:

- Applicant demographics.
- The average GPA for applicants from your school who receive at least one offer.
- The percentage of applicants from an under-represented minority.

Using the Menu Bar, open the Reports & Exports panel, click Export Manager, then click New Export.
1. Select Everyone or choose a list to export. The list acts as a filter on the applicant pool, returning data for only the applicants that meet the criteria set by your list. (See the section above for information on lists.)

2. Select an export type (.csv, .xls, .txt, or .zip).

3. Enter a name for your export.

4. Select whether to include column headings (column headings are names of the fields you select for the export).

5. Select how you want to export fields with more than one result (this includes fields like College Names, Test Scores, and Evaluations).
   - Select as many columns as needed to expand the field to display as many results as needed, based on the applicant pool you chose (i.e. if an applicant attended 10 colleges, the college field and all fields in that grouping will expand to 10 columns for all applicants).
   - Select exactly to set a fixed number of columns allotted for all one-to-many fields (i.e. you can set it to 2 columns, and colleges attended, test scores, and experiences will expand to 2 columns each). **Warning:** when selecting this option for an applicant who has more answers than the number of columns you selected, you can’t control which data points appear in the export. Entering a higher number of fixed columns may help ensure that you export all necessary data.
   - Select by field category to specify the number of fixed columns for a category. Selecting this option does not allow you to intermingle fields from different categories. Only sections with one-to-many fields offer the “Many” fields allowed: option.

6. Select who can view the export (just you or everyone at your school) and indicate if it should appear in the Menu Bar under the Reports & Exports panel (this option provides you with quick access to run the export).

7. Under the Export these fields... column, click the categories to view and select fields.

8. The fields you select appear in the ...in this order. column. If you previously selected .txt for the export type, you can set a fixed width for each item. Depending on the field, you can also select a data transformation option. These options are useful to IT staff when importing into an ERP system.

9. After selecting your fields, use the grip icon to drag and drop them into the preferred order; the top field will export first, and the bottom last. Additionally, you can group by field or numerically.
   - **Group by Field** exports the data by field category (e.g. School 1, School 2, School 3, Year 1, Year 2, Year 3).
   - **Group by Numeric** exports the data by value (e.g. School 1, Year 1, School 2, Year 2, School 3, Year 3).

10. When you’re done adding criteria, click Create File to save and run the export, **Save Export Settings** to save the customized export for future use, or **Return to Export Manager** to cancel the export.
**Note:** An Office 2007 security feature may prevent you from opening an export or report in .xls format. Adjust your export type to .csv to avoid this issue.

Additionally, MS Excel 2003 (and earlier versions) limits data to 255 columns, including data points that may generate more than one column (such as Colleges Attended). For larger exports, please use the .csv format. These files can be opened in MS Excel 2007 and later, even if they exceed 255 columns. Exceeding the Export Fields limit will result in an "Internal Server Error" message. To export all fields, try dividing the fields into two separate exports.

**Managing Exports**

You can manage your exports on the Export Manager page.

- To run an export, click the export name.
- To reorder an export, use the grip icon to drag and drop the export into the preferred order.
- To modify an export, click the pencil icon. Note that only export owners can perform edits.
- To copy an existing export, click the duplicate icon.
- To delete an export, click the remove icon. Note that only export owners can delete exports.