

Uploading Official Documents to Application Record

This article outlines the standard procedures for handling application documents received by the program office electronically or by mail.

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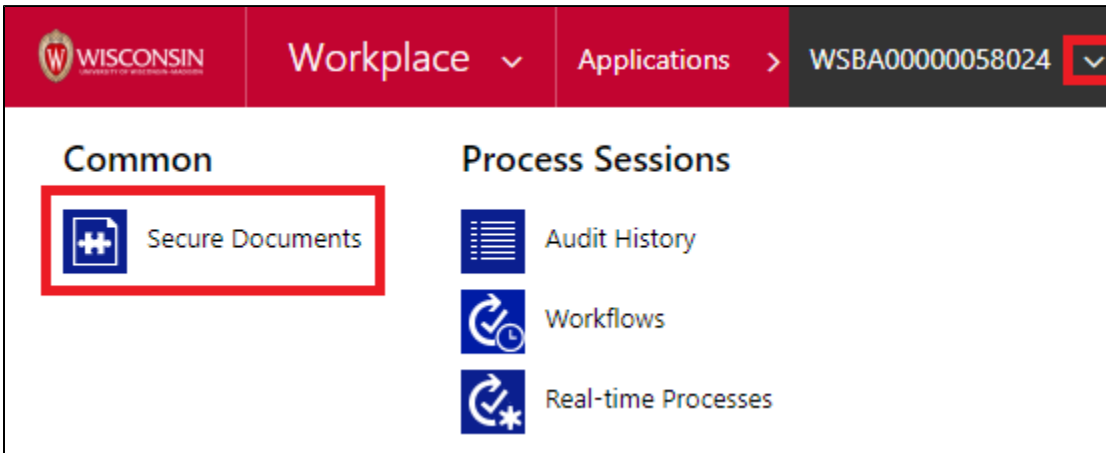
Policy: The Wisconsin School of Business requires certain documents to be uploaded to the "Documents" section of the applicant's Application Record in LRM. Hard copy and electronic documents received by the program office may need to be scanned and uploaded to the Application Record or stored as a secure document on the Person Record if no Application Record exists in LRM. Official documents are required to be stored on the Application Record when the applicant accepts admission to the Wisconsin School of Business.

View Application Documents

To view an applicant's related application documents, open the Application Record and select "Secure Documents" in the navigation menu at the top, to the right of the application name.



They can also be accessed by clicking on the caret menu to the left of the application name at the top of the page.



Documents uploaded to Application Record by the **applicant** include:

- Transcripts (optional for some programs) - most often classified as "unofficial" transcripts
- Resume (optional for some programs)

Documents uploaded to the Application Record by the **recommender** include:

- Letter of Recommendation (optional at time of online recommendation form submission)

Handling Application Documents Received by Program Office

Typical applicant documents received by the program office:

- Official GMAT Scores
- TOEFL or IELTS Scores
- Recommendation Letters
- Official Transcripts

Standard Procedure for handling applicant documents received by the Program Office

- Documents received by WSB Program Offices may include official GMAT Scores, TOEFL or IELTS scores, Recommendation Letters and Official Transcripts.
- Log in to LRM system.
- Search for the person named (search by first name last name in 2016) in the document to see if they have a Application Record or Contact Record.
 - Search under Application Entity and/or Person Entity
- If a current Application Record exists, then upload the document to the Application Record.
 - [Standard Document Upload Process](#)
 - [Verify the documents](#)
- If a Person Record is found and no current Application Record exists, this indicates the Prospective Student has not yet started an application for this term.
 - [Follow these instructions to store the document securely on the Contact Record.](#)
 - If the record is not flagged as a Prospective Student, use the Lead Management buttons to update this person's lead information appropriately. (KB reference: [Update Prospective Student Record](#))
- If no Contact Record exists, create a prospective student Contact Record.
 - An email address is required to create a Contact Record.
 - Create a Person Record flagged as a Prospective Student record (KB reference: [Create prospective student record](#))

Standard Document Upload Process

- Scan or save the document according to your unit's file storage policy using the following naming conventions:
 - Official GMAT_[Test Date]
 - Official TOEFL_[Test Date] or Official IELTS_[Test Date]
 - Recommendation_[Recommender Name]
 - Official Transcripts_[Institution Name]
- Attach the document to the Application Record in LRM
 - Open the Application Record
 - Navigate to **'Secure Documents'**
 - Select the "Add new secure document" if adding a new folder type.
 - Otherwise, select the folder the document is being added to.

Name	Created On
Applicant Info	8/7/2017 1:05 PM
Resumes	8/7/2017 12:56 PM
Unofficial Transcripts	8/7/2017 12:45 PM

- To get this menu from the main Contact record, click on the Record Associated View button to the very right of the screen.

Name	Created On
Applicant Info	8/7/2017 1:05 PM
Resumes	8/7/2017 12:56 PM
Unofficial Transcripts	8/7/2017 12:45 PM

- Select the document type, and then save the form. The **'Notes'** section will now be activated. Scroll in the box to the 'Attach' button. Refer to [this KB article](#) for more detailed instructions, but following the instructions for the application record.
- Follow related instructions to verify the information provided in the newly uploaded document

Process for Verifying Official Documents to an Application Record

- Official Test Scores (GMAT) - Stored and Verified on Application Record**
 - Official GMAT score reports are obtained by authorized program office staff who download the report from GMAT website.
 - The GMAT report is downloaded electronically, saved and then uploaded to the Application Record in LRM using the Standard Document Upload Process.
 - The Test Score is recorded and verified in LRM.
 - Within the Application Record, navigate to **Test Scores**, choose or create the appropriate Test Score Record.
 - Toggle the "Official" option to "Yes."
 - Save and Close.

2. **TOEFL or IELTS Test Score Reports - Stored and Verified on Application Record**
 - a. TOEFL or IELTS score reports are received hard copy via USPS from the testing services. Within 3 days of receipt, each report should be stamped with the received date.
 - b. The TOEFL or IELTS report is scanned electronically, saved and then uploaded to the Application Record in LRM using the Standard Document Upload Process.
 - c. The Test Score is recorded and verified in LRM
 - i. Within the Application Record, navigate to **Test Scores**, choose or create the appropriate Test Score Record.
 - ii. Toggle the "Official" option to 'Yes.'
 - iii. Save and Close.

3. **Recommendation Letters - Stored and Verified on Application Record**
 - a. Emailed recommendations or hard copy letter recommendations may be received by the program office.
 - b. The electronic recommendations are saved electronically and hardcopy recommendations are scanned and saved electronically using the Standard Document Upload Process.
 - c. The Recommendation is recorded and verified in LRM.
 - i. Within the Application Record, navigate to **Recommendations**, choose or create the appropriate Recommendation Record.
 - ii. Mark Submitted = Yes and enter Submitted Date.
 - iii. Save and Close.

4. **Official Transcripts - Stored on Application Record and Verified on Person Record**
 - a. Official Transcripts are typically received via USPS will come directly from the applicant's academic institution in a sealed envelope. Upon receipt, all pages should be stamped with the received date.
 - b. The Official Transcript is scanned electronically, saved and then uploaded to the Application Record in LRM using the Standard Document Upload Process.
 - c. The Official Transcript is recorded and verified in LRM.
 - i. Within the **Person Record**, navigate to **Academic History**, choose or create the appropriate Academic History Record.
 - ii. Toggle the "Received" and "Official" options to 'Yes.'
 - iii. Save and Close.