

## Enrollment Management – Getting Ready for Enrollment

Enrollment Management pulls records for new students from Admissions. Current student records are pulled from Accounts Receivable (AR) or Registrar (RG) if your school does not use AR. This preference for which application is the basis for enrollment is set during implementation.

Check out [Enrollment Management Help](#) for more Guides, FAQs, Videos and worksheets.

There are multiple tasks that should be completed before you begin posting data and publishing contracts for “Next Year”. Complete the steps below before posting data or publishing contracts.

1. [Check “Next Year” grades](#)
2. [Review your contract](#)
3. [Save historic data](#)
4. [Clear enrollment data from previous year](#)
5. [Set “Next Year” enrollment status](#)
6. [Update control fields used in queries](#)
7. [Remove Enrollment link for existing parents in My Backpack](#)
8. [Review all parent facing communications](#)
9. [Next Steps](#)

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*As with any type of web development, it is always a good idea to test the entire process yourself prior to making it available to parents, to make sure that it appears and functions as you expect.*

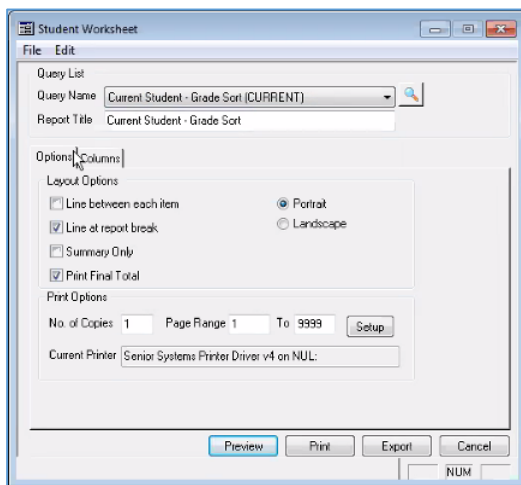
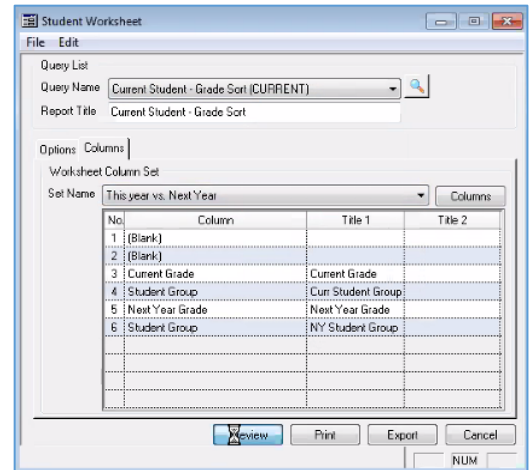
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## 1. Check “Next Year” grades

### MODULE: REGISTRAR (RG)

Verify that the Next Year grades are accurate in Registrar. Do this for each division.

- Create a student worksheet to check next year grade
  - Reports | Student Worksheet | Columns Tab
  - Select a Column Set in Set Name menu with
    - Current Grade
    - Current Student Group
    - Next Year Grade
    - NY student Group
  - Need to know how to create a column set?
    - [Watch the tutorial](#)
- Create a query for current students
  - Student group = Student
  - Sort by Grade
- Select Preview



- Pay close attention to late enroll/mid-year entry students
- Current 12<sup>th</sup> graders should have a blank Grade in Next Year and student Group = Graduate
- Nursery School students do not always matriculate sequentially; review next year grade if all students do not advance automatically

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*If a former student is returning, change the Next Year student group from Withdrawn to Student. The student record will now be visible in Enrollment. Verify that address data is still accurate. Update in Student/Parent or Registrar as needed.*

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## 2. Review your contract

### MODULE: ENROLLMENT MANAGEMENT

Please submit contract changes ASAP to Senior Systems Support if you need assistance in making changes

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*Note: if you have changes to layout, calculations or add check boxes or radio buttons it is best practice to submit those changes to Senior Systems. Always test contract changes.*

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- If you make your own updates using the Contract Editor please make a copy of the contract before making changes.
  - Copy existing and template and add the academic year as the prefix. (i.e. “2021-22 Re-Enrollment Contract FA”).
  - Contracts will all sort by year, making it easier to manage
- Identify which posting fields are used in the contract
- Identify merge fields that are used in the contract.
  - Verify that student grade is represented by %NextGrade%

These financial fields can be merged onto the contract and will update AR:

- Tuition
- Deposit
- Financial Aid Scholarship Amount
- Financial Aid Loan Amount

In Enrollment Management, the following fields can also merge onto the contract but will not post to AR when contract is approved.

- Discount Amount
- Other Amount

The school may use these “Amount” fields as needed. Typically they are used for fees such as Technology, Transportation.

#### Frequently used Merge Fields

StuFullName	Student Name
NextGrade	Student’s next year grade
TuitionAmt	Tuition
FAScholAmt	Financial Aid Scholarship Amount
FALoanAmt	Financial Aid Loan Amount
Deposit	Enrollment Deposit
DepositDate	Deposit Due Date
OtherAmt	Other
DiscountAmt	Discount Amount

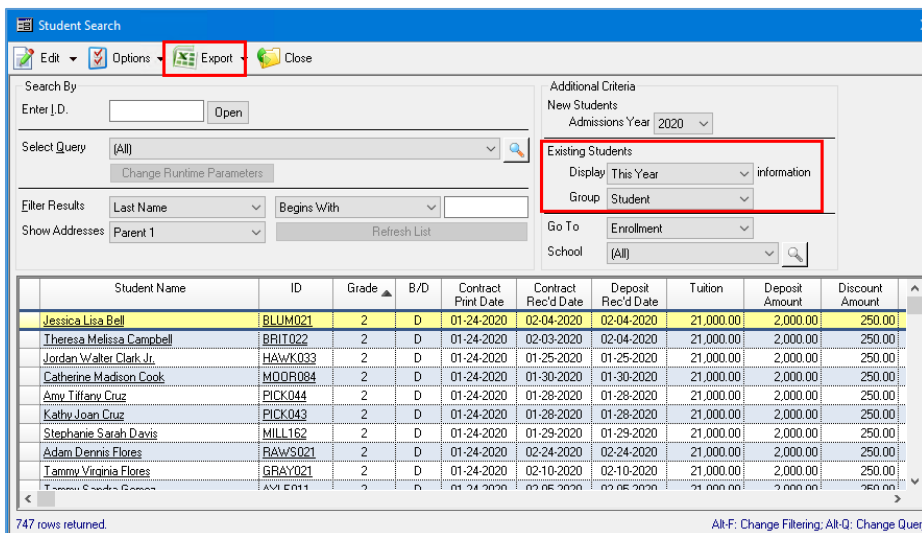
### 3. Save historic data

#### MODULE: ENROLLMENT MANAGEMENT (EM)

Deposit Amount, Other Amount, Discount Amount, contract and deposit received dates for 2020-2021 contracts will not be available on a search screen after you complete the Clear Enrollment Data task. After you begin a new enrollment year the only way that this information can be viewed is by accessing individual student contracts.

*Best Practice – Export data to Excel from Enrollment Management Student Search screen.*

- Export to Excel all fields used by your school from the Student Search Window
  - Set Existing student filter to This Year
  - Select Export
- Save to End of Year folder where you store your historic data
  - This will provide a viewable/sortable document



The screenshot shows the 'Student Search' window with the 'Export' button highlighted in red. The 'Existing Students' filter is set to 'This Year' and 'information', also highlighted in red. The table below shows student data with columns for Student Name, ID, Grade, B/D, Contract Print Date, Contract Rec'd Date, Deposit Rec'd Date, Tuition, Deposit Amount, and Discount Amount.

Student Name	ID	Grade	B/D	Contract Print Date	Contract Rec'd Date	Deposit Rec'd Date	Tuition	Deposit Amount	Discount Amount
Jessica Lisa Bell	BLUM021	2	D	01-24-2020	02-04-2020	02-04-2020	21,000.00	2,000.00	250.00
Theresa Melissa Campbell	BRIT022	2	D	01-24-2020	02-03-2020	02-04-2020	21,000.00	2,000.00	250.00
Jordan Walter Clark Jr.	HAWK033	2	D	01-24-2020	01-25-2020	01-25-2020	21,000.00	2,000.00	250.00
Catherine Madison Cook	MOOR084	2	D	01-24-2020	01-30-2020	01-30-2020	21,000.00	2,000.00	250.00
Amv Tiffany Cruz	PICK044	2	D	01-24-2020	01-28-2020	01-28-2020	21,000.00	2,000.00	250.00
Kathy Joan Cruz	PICK043	2	D	01-24-2020	01-28-2020	01-28-2020	21,000.00	2,000.00	250.00
Stephanie Sarah Davis	MILL162	2	D	01-24-2020	01-29-2020	01-29-2020	21,000.00	2,000.00	250.00
Adam Dennis Flores	BAW5021	2	D	01-24-2020	02-24-2020	02-24-2020	21,000.00	2,000.00	250.00
Tammy Virginia Flores	GRAY021	2	D	01-24-2020	02-10-2020	02-10-2020	21,000.00	2,000.00	250.00

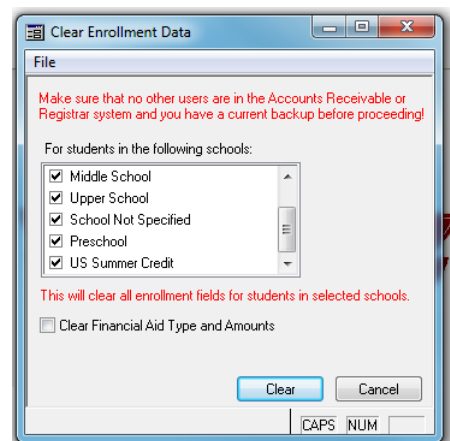
## 4. Clear enrollment data from previous year

### MODULE: ENROLLMENT MANAGEMENT (EM)

When you are ready to start the process for building Enrollment Contracts you will clear the enrollment data from the previous year. It is recommended that that no other users are in AR or Registrar when you run this task. On Premise Schools will verify that the nightly back up is complete.

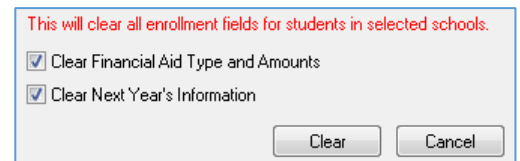
#### Maintenance | Clear Enrollment Data

- Choose the schools /divisions you want to clear
- OPTION to select Clear Financial Aid Types and Amounts
  - You only need to use this option if you are planning to put Financial Aid data into the actual Enrollment Contracts.
- If you choose to clear Financial Aid
  - Make sure the End of Year Process has been done for the Financial Aid module if you choose to use this option.
  - Verify that NO FA Awards have been entered
  - Select Clear Financial Aid Types and Amounts
    - The Scholarship field will be cleared
    - The Loan field will not be cleared
      - Loans are updated manually



*Only use Clear Financial Aid Type and Amounts if you have checked with your AR department to confirm they have not begun entering next year financial aid awards.*

- Select Clear Next Year's Information
  - This option only appears if you choose to *Clear Financial Aid Types and Amounts*.



- Click the Clear button to clear the following fields:

- |                             |                          |
|-----------------------------|--------------------------|
| ✓ Contract Print Dates      | ✓ Deposit Amount         |
| ✓ Contract Received Status  | ✓ Installment 1 Due Date |
| ✓ Contract/Deposit Due Date | ✓ Installment 2 Due Date |
| ✓ Contract Received Date    | ✓ Discount Amount        |
| ✓ Deposit Received Status   | ✓ Scholarship Next Year  |

- ✓ Contract/Deposit Received Date

## 5. Set “Next Year” enrollment status

### Module: Enrollment Management, Registrar or AR

When preparing for re-enrollment, remember that you will always use the **Next Year** data which is a copy of the data from **This Year**. Until you change the Enrollment Status, students will have an Enrollment Status of either Enrolled or Re-Enrolled (schools may use other values like “New Enroll”, “Returning”).

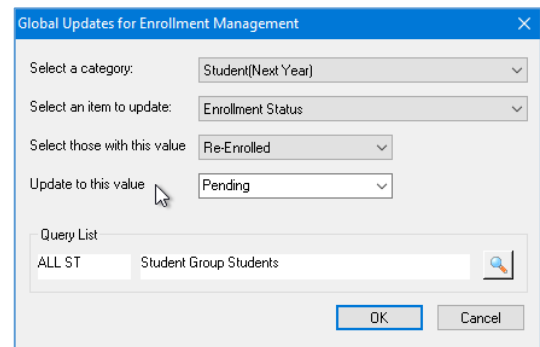
*In this example we will set the enrollment status of returning students to **Pending** using the Global Update task.  
(Schools may use other terminology, like “Invite Back”)*

Global updates can also be done in the Accounts Receivable (AR) module or in Registrar (RG) module depending on your school’s set up. Check out this tutorial on the [Enrollment Management Help](#) site.

### Maintenance | Global Updates

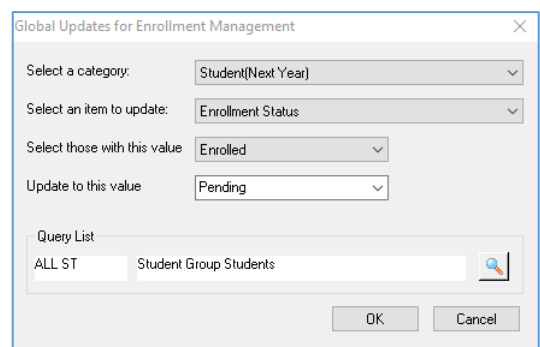
For students with status of **Re- Enrolled**.

- Select a category – **Student (Next Year)**
- Select an item to update - **Enrollment Status**
- Select those with this value –**Re-Enrolled**
- Update to this value –**Pending**
- Select Query – Typically All Students
- You will get a count of students... does it make sense?
- Click OK



For students with status of **Enrolled**.

- Select a category – **Student (Next Year)**
- Select an item to update - **Enrollment Status**
- Select those with this value –**Enrolled**
- Update to this value –**Pending**
- Select Query – Typically All Students
- You get a count of students... does it make sense?
- Click OK



*Note: A graduating student’s Next year Enrollment status should be [blank] in AR or RG so they will not appear in Enrollment Management search window. The data check in step 2 should catch any students who need to be updated.*

## 6. Update control fields used in queries (flags, grade types, custom fields)

### Module: Enrollment Management (EM), Admissions (AD) or Accounts Receivable (AR)

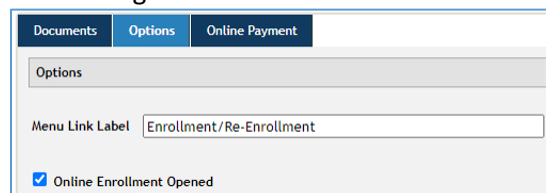
Enrollment Management will pull data from the Admissions module for new students. EM pulls data for existing Students from AR. If your school does not use AR then these fields may be modified in Registrar.

- Faculty Staff children
- Grade type may be used to identify groups of students; some examples would be:
  - 3 day, 5 day, ½ day programs
  - International
  - Remote
- Custom fields are often used to identify a specific criteria that is unique to school/contract. Some examples would be:
  - Oldest student in multi-child household
  - Merit award
- Does your contract allow parents to choose tuition and/or accident insurance? These fields should be cleared for Next Year.

## 7. Remove Enrollment link for existing parents in My Backpack

When you begin working on enrollment for the upcoming school year you have to be aware of what parents will see while you are working. Often you will be testing and making corrections so it is wise to disable parent access to Enrollment while you are working. There are two options:

- a. **Recommended:** Use the My Backpack permissions as a control feature. Remove Online Enrollment from the Parent MBP User Group in the System Administration module
  - Best option if you intend to test as administrators
- b. Uncheck “Online Enrollment Open” (MBP| Online Enrollment Setup | Options tab)
  - Deselecting this box removes the link for everyone, even administrators!



The screenshot shows a web interface with three tabs: Documents, Options (selected), and Online Payment. Below the tabs is a section titled "Options". Under "Options", there is a "Menu Link Label" field containing the text "Enrollment/Re-Enrollment". At the bottom of the section, there is a checkbox labeled "Online Enrollment Open" which is currently checked.

*When ready to open enrollment the My Backpack permissions will need to be updated. Please add security key for Enrollment to the Parent Group in the System Administration.*

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## 8. Review all parent facing communications

There are several items that need to be reviewed and updated in MBP. These pages control what a parent will see when accessing Online Enrollment. [MBP enrollment examples/screens continue below.](#)

### **MY BACKPACK SETUP | ONLINE ENROLLMENT**

- Documents Tab
- Options Tab
- Online Payment Tab

### **MY BACKPACK SETUP | BROADCAST MESSAGES | BROADCAST EMAIL TEMPLATES**

- General Tab
- Student/Parent Tab
- Admissions Tab
- Confirmation Tab

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*NEED TO KNOW MORE ABOUT MY BACKPACK (MBP)?*

*SIGN IN TO MBP AND CLICK THE HELP ICON  FOR THE COMPREHENSIVE ONLINE REFERENCE GUIDE!*

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## DOCUMENTS TAB

Online Enrollment Setup
Kayla David Lopez | Upper School

Documents

Options

Online Payment

**Web Page Instructions**

Name	Action
Top Part of Enrollment Page	
Bottom Part of Enrollment Page	
Enrollment Closed Page	
Edit Profile Instructions	

**Online Documents**

Name	URL	Type	Action
Additional Forms Page	/SeniorApps/admissions/dynamicFile.faces?fileId=51	Web Page	
Code of Conduct	/SeniorApps/dynamicFile/onlineDoc/215/AA_Code_of_Conduct.pdf	Document	
Lower School Handbook	/SeniorApps/dynamicFile/onlineDoc/216/AA_Lower_School_Handbook.pdf	Document	
Middle School Handbook	/SeniorApps/dynamicFile/onlineDoc/217/AA_Middle_School_Handbook.pdf	Document	
Upper School Handbook	/SeniorApps/dynamicFile/onlineDoc/218/AA_Upper_School_Handbook.pdf	Document	

Add Web Page
Add Document

## Web Page Instructions

Top and Bottom messages are seen by parents: Parent View

Enrollment / Re-Enrollment
Home ? Power

**Welcome to the Advantage Academy On-line Enrollment Page.**

This page will take you through the enrollment process for the 2015-2016 school year. Please see below for detailed instructions.

**Re-enrollment**

Name	Next Year Grade	Status	Review Profile	View Contract	Deposit Received Date	Online Payment	Additional Forms
Elise Garrity	11	Pending			N/A	Pay	

**Enrollment**

Name	Next Year Grade	Status	Review Profile	View Contract	Deposit Received Date	Online Payment	Additional Forms
Mark G Garrity	2	Accepted			N/A	Pay	

✔ Indicates the item has been submitted or completed

**Online contract(s) must be completed and deposits made by March 20, 2016.**

To complete the enrollment process please follow the steps below:

1. Click on the View Contract link. Please review your enrollment agreement and fill in the appropriate fields. All fields bordered in red must be completed. Click the Submit button on the bottom of the contract to submit your contract to the school. **A contract must be completed for each student that is enrolling.**
2. You will then be re-directed to pay your deposit via credit card. Follow the instructions on the payment page. You may make multiple deposit payments in a single transaction; however, you must return to the Enrollment Home page to complete a contract for each student.
3. DO NOT use your web browse back-button, as this will close the contract window. Rather, please use the "Return to the contract" links at the top of each page.

**Top Part of Enrollment Page:**  
Welcome message

There will be a row for each student

**Bottom Part of Enrollment Page:**  
Instructions about the online enrollment process for your family.

Note: an AutoPay Set up icon will be visible if the feature is activated.

Additional Forms 	AutoPay Setup 
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**Enrollment Closed** is used by schools who have a hard deadline for contract submission. If your school has rolling admissions this is not necessary.

*Sample Text: Online Enrollment is closed. If you have not yet completed the re-enrollment process for school year 20xx-20xx, please contact the Admissions Office at 888-488-8888.*

### Edit Profile Instructions

If your school requires Profile Updates during enrollment process please review your instructions.

*Sample Text: Please update your family information below. Your contact information is important to us!*

*If you have contact information you do not want to be visible in the online Student/Family Directly, please check the box labeled DNP (Do Not Publish) next to the appropriate field.*

*After you make changes or if all of your information is correct,  
please check the box and click Submit*

### Online Documents

Multiple documents, such as medical or housing forms, can be uploaded in MBP. The documents in the Online Documents table have associated URLs that may be used as hyperlinks include in your communications.

Name	URL	Type	Action
Additional Forms Page	/SeniorApps/admissions/dynamicFile.faces?fileId=51	Web Page	
Code of Conduct	/SeniorApps/dynamicFile/onlineDoc/215/AA_Code_of_Conduct.pdf	Document	
Lower School Handbook	/SeniorApps/dynamicFile/onlineDoc/216/AA_Lower_School_Handbook.pdf	Document	
Middle School Handbook	/SeniorApps/dynamicFile/onlineDoc/217/AA_Middle_School_Handbook.pdf	Document	
Upper School Handbook	/SeniorApps/dynamicFile/onlineDoc/218/AA_Upper_School_Handbook.pdf	Document	

### Additional Forms Page (Optional)

You can design your own Additional Forms page to create a list of forms for parents to reference or download. Use external URLs or use the URLs in the Online Documents table that is associated with uploaded documents.

*Example: Additional Forms Page Parent View*

Add hyperlinks to external pages

Add hyperlink using URL related to document in Online Documents table

Daily Updates can be viewed [here](#)

Please review the documents below for more information.  
Handbooks will be available in July. For current policies, please see this year's handbooks listed below.

CODE OF CONDUCT

ATHLETICS AGREEMENT

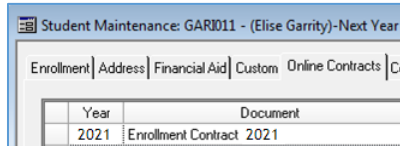
STUDENT RELEASE

ACCEPTABLE USE POLICY

MEDIA RELEASE

## OPTIONS TAB

1. Menu Link Label is the link the parents see in the Portal
2. Check Online Enrollment Open
3. Update the Enrollment Year
  - a. This controls the year for Online Contract displayed in Student record in EM
  - b. Use: next year student information



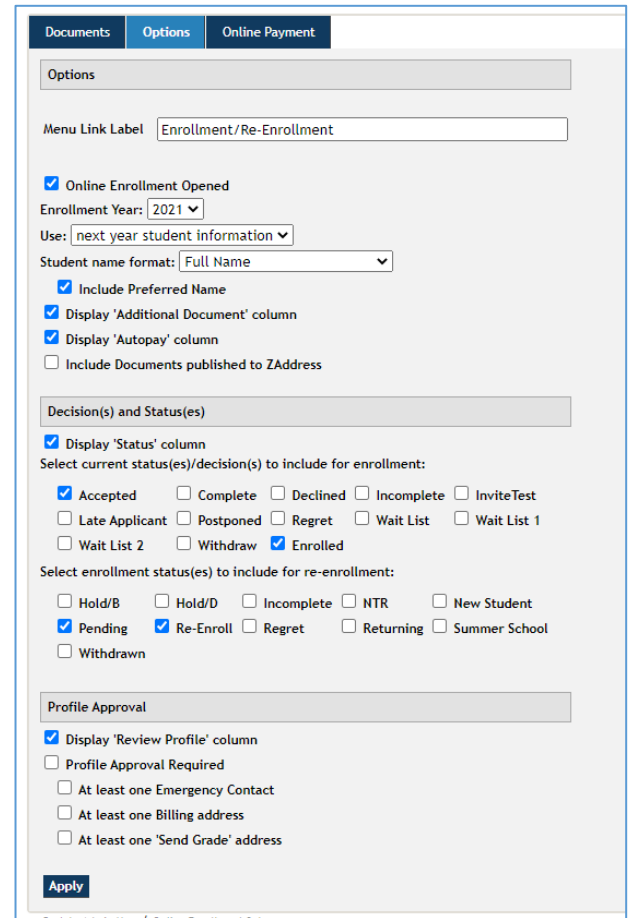
Year	Document
2021	Enrollment Contract 2021

4. Decision(s) and Status(es)
  - a. Enrollment status for incoming students
  - b. Re-enrollment status for existing students
5. Profile Approval
  - a. If you require profile approval this implies that a staff member is approving changes daily

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*Verify the Enrollment Year in MBP before publishing contracts!*

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**Options**

Menu Link Label:

Online Enrollment Opened  
 Enrollment Year:   
 Use:   
 Student name format:

Include Preferred Name  
 Display 'Additional Document' column  
 Display 'Autopay' column  
 Include Documents published to ZAddress

**Decision(s) and Status(es)**




Display 'Status' column  
 Select current status(es)/decision(s) to include for enrollment:  
 Accepted  Complete  Declined  Incomplete  Invite Test  
 Late Applicant  Postponed  Regret  Wait List  Wait List 1  
 Wait List 2  Withdraw  Enrolled

Select enrollment status(es) to include for re-enrollment:  
 Hold/B  Hold/D  Incomplete  NTR  New Student  
 Pending  Re-Enroll  Regret  Returning  Summer School  
 Withdrawn

**Profile Approval**

Display 'Review Profile' column  
 Profile Approval Required  
 At least one Emergency Contact  
 At least one Billing address  
 At least one 'Send Grade' address

## ONLINE PAYMENT TAB

Online Enrollment Setup	
Documents	Options
<b>Online Payment</b>	
<b>Web Page Instructions</b>	
Name	Action
General Payment Instructions	
Check Payment Instructions	
Check Payment Voucher	

### GENERAL PAYMENT INSTRUCTIONS

Sample Text: Credit Card Payment for your online application can be made with Discover, MasterCard and Visa by using the secure form below.

If you wish to pay by way of cash, check or money order, please download the Check Voucher and return/mail to the Admissions Office.

*If the Check Voucher window does not appear, please check your browser settings to allow the pop up window to be visible.*

### Some schools include disclaimer

*The School takes precautions to protect our users' personal information. We do not share, sell, or disclose any information with outside parties. Whenever users submit personal information (such as contact information or credit card information) via online forms, that information is encrypted via the highest SSL (Secured Sockets Layer) level available. Servers that store personally identifiable information are in a secure environment. Credit card numbers are not permanently stored on our website servers.*

### CHECK PAYMENT INSTRUCTION

If you require your parents to use an eCheck and not be able to mail in a “paper check”, then you do not have to enter anything on this or the Check Payment Voucher page.

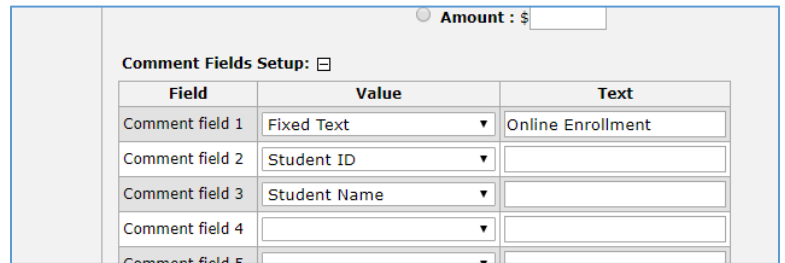
Please print the Check Voucher below and include the voucher with your payment.

### CHECK PAYMENT VOUCHER

Only utilized if you allow “paper” checks. Include merge fields for Payment Date and Payment Amount, and the school mailing address.

## COMMENT FIELD SETUP

This text will display in the transaction detail on the school bank statement. This assists the Business Office in reconciling any payment questions.



Amount : \$

Comment Fields Setup:

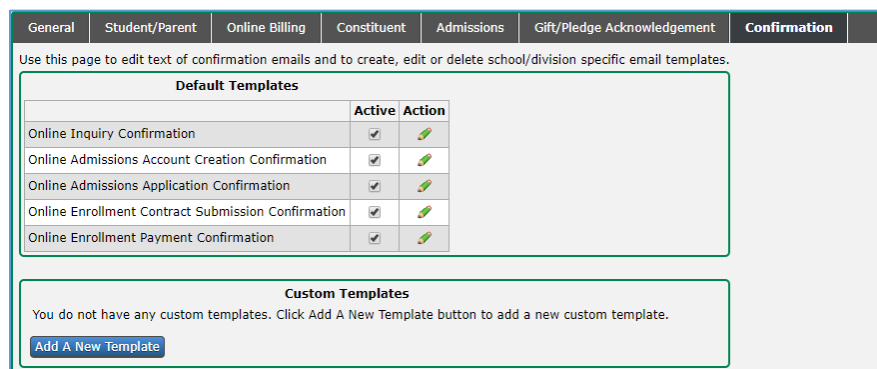
Field	Value	Text
Comment field 1	Fixed Text	Online Enrollment
Comment field 2	Student ID	
Comment field 3	Student Name	
Comment field 4		
Comment field 5		

## MY BACKPACK SETUP | BROADCAST MESSAGES | BROADCAST EMAIL TEMPLATES

### BROADCAST EMAIL TEMPLATES

Review and verify the accuracy of all parent facing templates.

- General: review login messages
- Student /Parent: review re-enrollment letter
- Admissions: review enrollment letter
- Confirmation: review Enrollment Submission and Payment confirmations



General Student/Parent Online Billing Constituent Admissions Gift/Pledge Acknowledgement **Confirmation**

Use this page to edit text of confirmation emails and to create, edit or delete school/division specific email templates.

**Default Templates**

	Active	Action
Online Inquiry Confirmation	<input checked="" type="checkbox"/>	
Online Admissions Account Creation Confirmation	<input checked="" type="checkbox"/>	
Online Admissions Application Confirmation	<input checked="" type="checkbox"/>	
Online Enrollment Contract Submission Confirmation	<input checked="" type="checkbox"/>	
Online Enrollment Payment Confirmation	<input checked="" type="checkbox"/>	

**Custom Templates**

You do not have any custom templates. Click Add A New Template button to add a new custom template.

[Add A New Template](#)

## 9. Next Steps

### POST DATA

- Post enrollment merge fields
- Update Financial Aid fields as needed
- Update custom or other fields critical to your school contracts, for example:
  - Identify the oldest child in a custom field
  - Change Grade Type to track half day versus full day preschool students

### PUBLISH CONTRACTS

- Contract edits are complete by this step
- Publish contracts

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*PLEASE TEST ALL STEPS in your process with at least one Parent!  
Broadcast email, Profile Updates, Submit, Pay*

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### CHECK MY BACKPACK SECURITY GROUPS

#### **IN SYSTEM ADMINISTRATION: MY BACKPACK | GROUP MAINTENANCE | EDIT GROUP PROFILE**

- Verify that the Online Enrollment security key is assigned to Parent Group(s)

### SEND BROADCAST EMAIL

- Once you have thoroughly tested all the steps in your process you will inform the parents that the contracts are ready for review by sending a Broadcast email.

### APPROVE CONTRACTS

- In the Enrollment Management module, the Online Contracts awaiting approval link will indicate a count of contracts that have been submitted. Approve contracts that have been submitted.

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*REMINDER for schools that require Profile Updates:  
Assign staff to approve profile updates frequently throughout the re-enrollment/enrollment season.*

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