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

Best Practice – Publish, submit, and pay deposit with at least one parent prior to opening the Enrollment season.

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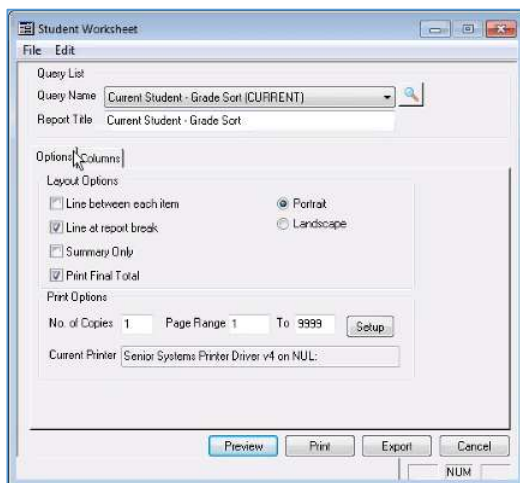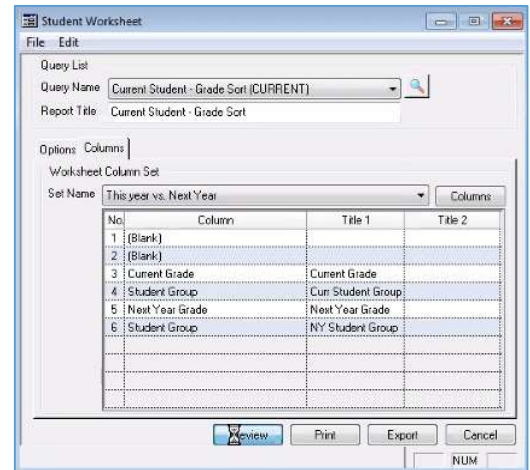
- Pay close attention to late enroll/mid-year entry students
- Current 12th graders should have a blank Grade in Next Year and student Group = Graduate
- Nursery School students do not always matriculate sequentially; review next year grade if all students do not advance automatically

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*If a former student is returning, change the Next Year student group from Withdrawn to Student.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

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.

- If you make your own updates using the Contract Editor, please make a copy of the contract before making changes.
  - o Copy existing and template and add the academic year as the prefix. (i.e., "2023-24 Re-Enrollment Contract FA").
  - o 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.
  - o 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 the current academic year 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

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
    - Most schools DO NOT select this and leave amounts in place as a reference to past awards.
    - If your school displays Financial Aid in the enrollment contract be sure to verify FA awards before publishing
- 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 for Next Year
    - Select Clear Financial Aid Types and Amounts
        - The Scholarship field will be cleared
        - The Loan field will not be cleared
            - Loans are updated manually
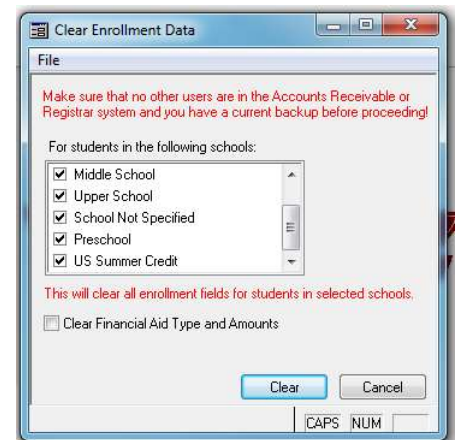
Only use Clear Financial Aid Type and Amounts if you have checked with your AR department to confirm they have not begun entering next year financial aid awards.

- Select Clear Next Year's Information
    - This option only appears if you choose to *Clear Financial Aid Types and Amounts.*
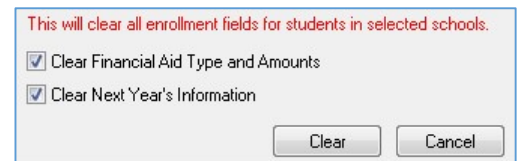
- Click the Clear button to clear the following fields:

- ✓ Contract Print Dates
- ✓ Contract Received Status
- ✓ Contract/Deposit Due Date
- ✓ Contract Received Date
- ✓ Deposit Received Status

- ✓ Deposit Amount
- ✓ Installment 1 Due Date
- ✓ Installment 2 Due Date
- ✓ Discount Amount
- ✓ 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**.

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

For students with status of **Enrolled**.

- o Select a category – **Student (Next Year)**
- o Select an item to update - **Enrollment Status**
- o Select those with this value –**Enrolled**
- o Update to this value –**Pending**
- o Select Query – Typically All Students
- o You get a count of students... does it make sense?
- o 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)
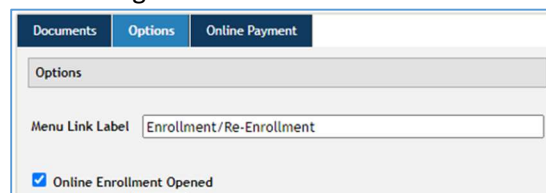
Enrollment Management will pull data from the Admissions module for new students. EM pulls data for existing Students from AR. If your school does not use AR, then these fields may be modified in Registrar.

- 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 criterion 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 must be aware of what parents will see while you are working. Often you will be testing and making corrections, 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!

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.

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

NEED TO KNOW MORE ABOUT MY BACKPACK (MBP)?

SIGN IN TO MBP AND CLICK THE HELP ICON ⑦ *FOR THE COMPREHENSIVE ONLINE REFERENCE GUIDE!*

DOCUMENTS TAB

Web Page Instructions

Parents see Top and Bottom messages: Parent View

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.

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 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.

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

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

1. Menu Link Label is the link the parents see in the Portal
2. Check Online Enrollment Open
    a. In this example we are sending contracts for 2023-2024 school year
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

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

Verify the Enrollment Year in MBP before publishing contracts!

ONLINE PAYMENT TAB

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.

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

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

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

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.

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