

Quick Reference: Online Inquiry/Application Approval

RELEASE 93_2 Allows more control on checking matching names (Maintenance/Administrative Maintenance>Online Admissions Tab)

eneral Checklist Items Letters Dec	isions Interests Online Admissions Preferences		
Select the options to use to find	d duplicate inquiries:		
Match By Applicant Last Name O All characters	Match By Address Last Name O All characters		
Match By Applicant First Name	Match By Address First Name All characters First characters 		
Match By Applicant Birth Date Gender			

REMINDER: The Admissions module will only check for inquiries in the current academic year. It will not check previous admission year inquiries.

RESOLVING ONLINE INQUIRY/APPLICATION WARNINGS

In the Online Inquiry/Application Search window will be a list of records that need to be approved.

🖌 Open 🎾 Close									
Search For:	Sort By		Sort Order	Op	tions				i.
	Last Name [Sort Ker	Ascending	Sc	hool Appl	ying (AII)	• <u> </u>	6
4	I.D.	E	Descending	Dis	play	A	I Inquiries and A	pplications 👻	
Last Name (Sort Key)	Status			Gri	ade Type	V	All)	•	
	Telephone	*		Ad	missions '	Year 4	All) 🔻		
				Go	То	N	lame 🔻	Approve All Inquiries	& Applications
Name	ID	Fee Pd.	City	State	Adm Yr	Grade	Status	Telephone	
Lara Croft	0011584	N	Alamo	NV	2017	5	Applicant	775-	25 Rock Road
6	00415000		N.C. al		0017		-	C17	OF Childrey Cher

A red record indicates that there is data that is new or duplicated in the system already.

• Select a record in red





Online Admissions Applicant

Status Unapproved

Errors/Warnings Prev. School 1 not on

Potential Dup. Family.

On the right side of Inquiry/Applicant Maintenance window (Name tab) Errors/Warnings will be listed in red.

A single inquiry/applicant record can have multiple potential error and/or warning messages

- Some messages may appear/disappear as you add/edit information
- After you address all flagged issues, the message "No warnings" appears
- You are now able to change the record's status to Approved

earch For: T. MICHAEL'S ACADEMY		Sort By Name T	ype 🌘	Sort Order Ascending	
ame		🔘 State	0	Descending	g
Name	Address	City	State	Туре	
St. Michael's All Angels MDO	8011 Douglas	Dallas	TX		
St. Michael's and All Angels Early	Cl <mark>i</mark> 8011 Douglas Ave	Dallas	TX		
St. Michael's and All Angels Press	h¢ 8011 Douglas Ave	Dallas	TX		
St. Michael's Country Day School	180 Rhode Island Ave.	Newport	RI		1
St. Michael's MD0					
St. Michael's Mother's Day Out	PO Box 12385	Dallas	TX		Ī
St. Michael's Preschool					
St. Michaels					
St. Michaels All Angels MDO					
St. Michael's Lutheran School					Ī
St. Michaels MD0	8011 Douglas Ave	Dallas	TX		
St. Michale & All Angels MDO	8011 Douglas Avenue	Dallas	TΧ		+
		ОК	Cancel	Dele	te
			Construction of the second		
	Edit Confirmat	ion Message			

School Not on File (also applies to Referrals not on file)

Click on the magnifying glass to search for School name in database

- Choose one of two options:
 - 1. If Name is in list:
 - Select the Name from the database
 - 2. if Name is NOT on the list
 - Select Cancel
 - You will be prompted to add a new school when you finish checking record
- Continue to verify data record, select OK

When prompted to add a new school

Select YES



Enter information in School Maintenance window. Complete full name and address.

• Select Save

ile Edit	Tools Help	
Open	Nove 🙀 Cancel 📰 Delete 🍏 Prin	Close
Name [St. Michael's Academy	9
.D. [ST. MICHAEL'S ACADEMY	
Address		
Line 1	100 Eddywood Street	Telephone Numbers
Line 2		
Line 3		
City/St/Zip	Springfield MA v 01118	Fax No.
Country	~	EMail
City/St/Zip Country	Springfield MA v 01118	Fax No
be	~	Last Update
ontact		
L		



arch For: N me (Sort H	(ey)		<u> </u>	Sort By Name Industry	Sort Order Sort O
] Company Name/Addre	Maintenance - (Ne	ew) Child Compa	nies Comments	
Ser Ser Ser	Name Line 1	Senior Systems 201 Boston Post Rd			Known As
The Gru Ser	Line 2 Line 3 City/St/Zip	Marlborough	MA 🗸	01572	
Sec Sec	Country Sort Key	SENIOR SYSTEMS	•]	
Pan	Industry Parent Co.		✓ Federal I.I		l

• Click on the magnifying glass to search for Company Name

TIP: If the Company name does not appear in table at first glance, shorten the Name in search field Take time to keep data consistent!

- Choose one of two options:
 - 1. If the Company Name is in list:
 - Select the Name from the database
 - Select Yes if prompted to update
 - Update address information
 - Select OK
 - 2. If the Company Name is NOT on the list
 - Select NEW
 - Complete the address
 - Select OK

COMPANY NOT ON FILE



POTENTIAL DUP. FAMILY

- An address already in the database has a first and last name match for either the Parent Name 1 or Name 2 field.
 - This may be another child of a parent already in the database
 - You will have the opportunity to link the records after examining all the data.
- Select the Address tab

Name Address Info Decision Checklist Visit Test	Scores Fin Aid	Connection Track Media	Custom Mailings Comr	nents
Name				Online Admissions
First Dean Middle	Last	Winchester	Suffix 👻	Inquiry Status Uppergraved ===
I.D. 0011569 Assign Preferred Dean	Sort Key	WINCHESTER, DEAN	Full Names	Conapproved o
Current School	Biogr	aphical		
School THE TESTERS SCHOOL	🔍 Gend	er M 👻 D.O.B 05-04-20	11 Age 5	Potential Dup. Family.
Grade PK4 From To	SSN			

C Name		Code	Address Type Stmt (Loar	ns) Active In Use Visit Grades I Ner	~
Mrs. and Mrs. John Wind	chester	S Parent 1	Original	Ed	lit
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			win	Cast Name Cast Name (Father)	Ascending
🚯 Address	🔓 Telephi	one Numbers	Last Name (Father)	I.D. 🔘 Last Name (Mother)	O Descending
50 SW 24th Madborough MA 01572	Tel No:		Display Options		
USA	Fax No:		Active Only () Th	is Application 💮 All Applications	
Father: John Sten Mother: Tara					
oup moulos, raid				Name	Family I.D.
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🥙 Comments			Mrs. John Winchester Mr. John Winchester	-	008573 008571 00000210
👏 Comments			Mrs. John Winchester Mr. John Winchester		008573 008571 0006216 009165
👏 Comments			Mrs. John Winchester		008573 008571 0006216 008165 0000782
Comments		, 	Mrs. John Winchester Mr. John Winchester		008573 008571 0006216 008165 0000782 FUNK01
Comments		-	Mrs. John Winchester		008573 008571 0006216 008165 0000782 FUNK01 008444
Comments		-	Mrs. John Winchester		008573 008571 0006216 008165 0000782 FUNK01 008444
Comments		-	Mrs. John Winchester Mr. John Winchester		008573 008571 0006216 008165 0000782 FUNK01 008444
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Comments			Mrs. John Winchester Mr. John Winchester 50 SW 24th Matborough, MA 01572 Father, John Step Mother: Tara	Tel No: Used by: Ada	008573 008571 0006216 008165 0000782 FUNK01 008444
Comments			Mrs. John Winchester Mr. John Winchester 50 SW/ 24th Matborough, MA 01572 Father, John Step Mother, Tara	Tei No: Used by: Adm	008573 008571 0006216 008165 0000782 FUNK01 008444
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Comments			Mrs. John Winchester Mr. John Winchester 50 SW 24th Matborough, MA 01572 Father: John Step Mother: Tara	Tel No: Used by: Adr	008573 0008571 0006216 0000165 0000782 FUNK01 008444

Address Tab

- Click on the magnifying glass next to Family ID (note the current Family ID)
 Address Family Search
- Click on the magnifying glass*
- Search for last name
 - Two records with same name with different family ID's
 - One ID likely belongs to the applicant you are looking at.
 - You may have two siblings who apply at the same time
 - You may have a different family with same name
- Select possible duplicate family
- Choose Show Linked Students

*Note: if you cannot find the

duplicate name: Select All Applications and repeat search. If the family is in a Summer program close this window and select **IGNORE DUPLICATES**. Summer School IDs are independent from Academic IDs



			Address Family S Search For:	earch	Sort By			Sort Order	
dc	Iress Family	y Search - Linked Students				×	Father)	Ascending	9
Lir	ked Studer	its for: Mr. John Winchester					Mother)	O Descendi	ng
	Admiss Year	Name	School	Grade	Group	ID			
	2017	Samuel Winchester	Lower School	1	Inquiry	0011567	~		
								Family I.D.	
								008614	
								008573	
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								0006216	
								008165	
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4	-					F.		FUNK01	
					1	~		008444	۰.

You have the opportunity to link the records after examining all the data.

You note that Family 008571 and Family 008573 are the same family

• Select Close

DUPLICATE FAMILY

If you determine that the two students are part of the same family

- Select the address that has the most accurate information
- Select OK

Display Options Active Only All Applie	cations 🔘 This A	Family Opti pplication Family I.D.	008573 Arrent Web Acco	ounts Ignore Duplicates Ta	isks	
EC Name	e	Code	Address Type Stmt (Loans)	Active In Use Visit Grades I Ne	ew	
Mrs. and Mrs. John W	inchester	🌦 Parent 1	Original		dit	
			Address Family Search			[
			Search For:	Sort By	Sort Order	
		Ť.	WIN	A Last Name (A Last Name (Father)	Assanding	
			Last Name (Father)		Ascending	1
Address	🔓 Teler	phone Numbers	Last Walle (Fatter)	I.D. D Last Name (Mother)	O Descendir	ng
Jiep mourier, i did				Name	Family I.D. 008614	
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👏 Comments			Mrs. John Winchester		008573	
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🖱 New Family ID			
Enter the new Family ID	Name	Lode	
Existing Family ID	Mr. and Mrs. John Winchester	Parent 1	Choo
Enter an existing Family ID 008571			• This I
			stude
	50 SW/24th Mailborough, MA 01572 USA Father: John Step Mother: Tara	Tel No: Used by: Admissions	• Choo
		Show Linked Students	

amily ID window

- se the Existing Family ID
- D will be assigned to nt
- se Next

- Choose Next in Warning Box
- Click Finish as prompted



NOT A DUPLICATE FAMILY

If you determine that no common sibling/address record exists:

Select the Ignore Duplicates check box •

Name Address Info Decision Checklist	Visit Test Scores	Fin Aid Connec	tion Track Media	Custom Mailir	ngs Cor	nments	1		
Display Options Image: Active Only Image: All Applications Image: Control of the second seco	This Application	Family Options Family I.D. 0085	573 🔍 Pa	arent Web Acc	ounts	🗾 Igno	ore Dup	olicates	Task
EC Name		Code	Address Type	Stmt (Loans)	Active	In Use	Visit	Grades I	Nev



POTENTIAL DUP. INQUIRY



A Check Duplicate button appears above the Errors/Warning box if multiple Inquiries have been submitted for the same student.

• Select Check Duplicate

A wizard window opens, to walk you through the process of checking and potentially merging the duplicate record by displaying information from the existing record:

Name Grade	Carla Stevens		
Grade			
	6		
Address	121 Bildge St Anytown, MA 12345 United States		
Print Stu	dent Sheet Reports		
 This is N This is U 	IOT the same person re same person. Press NEXT to begin the merge.		

You can optionally click the button to print both of the Student Sheet reports to help you determine whether the records are duplicates or not.



- To resolve the error and create a new record for a new person, select 'This is NOT the same **person**' and then select **Finish** to complete the process. The error message will now be cleared.
- To proceed with the merge process, select 'This is the same person' and then select Next.

For each type of information that varies between the records, the wizard displays the information from the existing record, and allows you to decide whether or not to merge that field into the current record:

Referal/Source	
Lead Source Internet Fac/Stall Child Description Referat	If you DON'T want to merge
	box at the bottom of the screen
	Select Next
Do not marge these fields when I dick NEXT	Carrel

You may have to repeat this process for other fields if they differ between the records.

Finally, the wizard allows you to decide whether or not to actually delete the previous inquiry record:

tial Duplicate	
The inquiry record will now be deleted.	
Do not delete the inquity record when I click NEXT	
< Back Ne	et> Cancel

f you DON'T want to delete the previous inquiry record, check the appropriate box

Select **Next** to complete the merge process. The error message will now be cleared.





Once all warnings are cleared the record in the Online Inquiries/Applications Search window will be black.

TIP: Select Approve All Inquiries and Applications button to approve all records in black

Search For:	Sort By Last Name (S First Name I.D. Grade Status Telephone	Sort Key 🔺 E	Sort Order Ascending Descending	Op Sc Dis Gra Ad	itions hool App splay ade Type missions	lying (j. 2 : (j. Year (j.	All) All Inquiries and Ap All)	plications	6		
				Go	То	1	lame ▼ (Approve All Inquiries	& Applications		
Name	ID	Fee Pd.	City	State	Adm Yr	Grade	e Status	Telephone			
Lara Croft	0011584	N	Alamo	NV	2015	5	Applicant	775-555-3892	25 Rock Road		
Dean Winchester	0011569	N	Winthrop	MA	2015	K	Inquiry	617-555-3904	25 Shirley Street		
<							Online Inc Printing (Print Print Print.	quiry / Application Dotions Posting Register Application Photos Applications opies	4 per page	×	 Print Options: Print Posting Registe prints a list of inquiry and applicants Print applications prints applications only. Inquiry forms

Vame				Online Admissions		
Inst Dean Middle	Last	Vinchester	Suffix -	Status Unapproved -		
D. 0011569 Assign Preferred Dean S	Sort Key	WINCHESTER, DEAN Full Names		Approved Unapproved		
Current School	Biograp	nical				
chool THE TESTERS SCHOOL	Gender	M 🕶 D.O.B 05-04-2011	Age 5	No warnings.		
rade 10 From To	SSN					
Applying For	Referra	/Source		÷		
chool Upper School 👻 Board/Day D 👻	Lead S	urce Current Family -	E Fac/Staff Child	Applicant		
rade 11 Admiss Yr 2015 Grad Yr 2017	Descrip	on		Status Unapproved 💌		
🗖 Repeating 📄 Midyear	Referra					
ype 🔻 Group 💌				Errors/Warnings		
				No warnings. 🛛 🔺		
Interests						
				*		

You may also approve records individually.

- Choose the appropriate status

 Inquiry or Applicant
 - Select Approve from menu





Scenario 1: Duplicate Family AND Duplicate Inquiry

1. Resolve the Duplicate Family issue first.

Go to the Address tab and verify that the system has not identified a "sibling" record that is consistent with the new application record. If this scenario is true, change the Family ID in the Address tab of the <u>record with the most up-to-date family information</u>. That could be the new student application record or the resident sibling record.

2. Resolve the Duplicate Inquiry issue ONCE the duplicate family warning is removed.

Check the **Duplicate Inquiry** check box above the warning message. Run the associated wizard and merge the (2) student records together. Remember to capture the "Inquiry date" from the inquiry record.

Scenario 2: Duplicate Family

- Go to the Address tab and verify that the system has not identified a "sibling" record that is consistent with the new application record. If this scenario is true, change the Family ID in the Address tab of the <u>record with the most up-to-date family information</u>. That could be the new student application record or the resident sibling record.
- 2) If you determine that no common sibling/address record exists, select the **Ignore duplicate family entry** check box.
- 3) Determine if an associated Inquiry Record exists for the applicant record. If yes, copy the "Inquiry Date" and any other relevant previously captured information that needs to be kept from the Inquiry record into the applicant record (this keeps statistics of Inquiries per month reporting accurate.)
- 4) Delete the Inquiry record so the applicant only has a single record.
 **NOTE: This step is assuming the applicant record contains more family data than the Inquiry record.
 Otherwise you would just keep the Inquiry record and delete the applicant record.

Scenario 3: Duplicate Inquiry

Check the **Duplicate Inquiry** check box above the warning message. Run the associated wizard and merge the (2) student records together. Remember to capture the "Inquiry date" from the inquiry record.