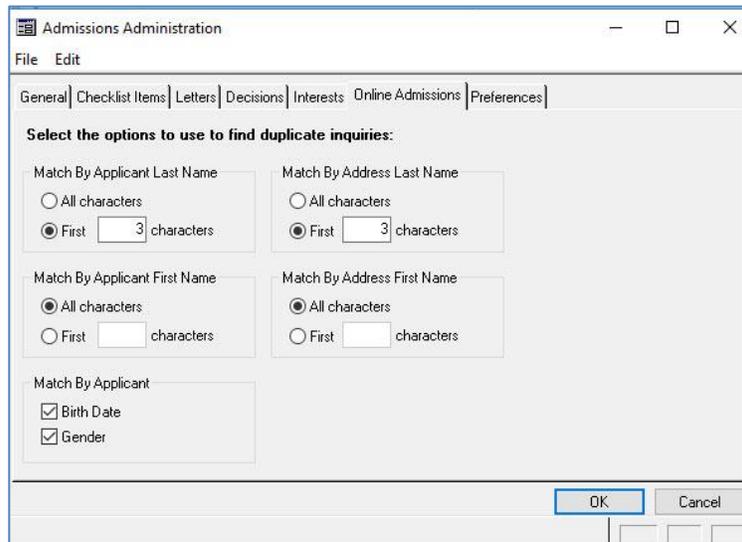


Quick Reference: Online Inquiry/Application Approval

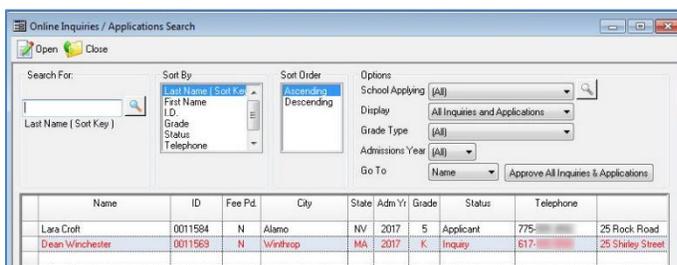
*RELEASE 93_2 Allows more control on checking matching names
(Maintenance/Administrative Maintenance>Online Admissions Tab)*



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.



The screenshot shows the 'Online Inquiries / Applications Search' window with a search criteria table and a list of records. The search criteria are: Search For: Last Name | Sort Key; Sort By: Last Name | Sort Key; Sort Order: Ascending; Options: School Applying: (All), Display: All Inquiries and Applications, Grade Type: (All), Admissions Year: (All), Go To: Name, 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
Dean Winchester	0011563	N	Winthrop	MA	2017	K	Inquiry	617-████████ 25 Shibley Street

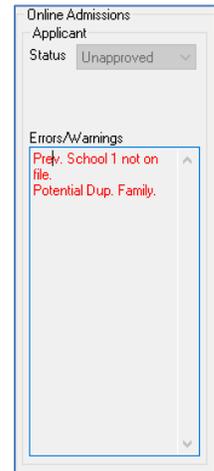
A red record indicates that there is data that is new or duplicated in the system already.

- Select a record in red

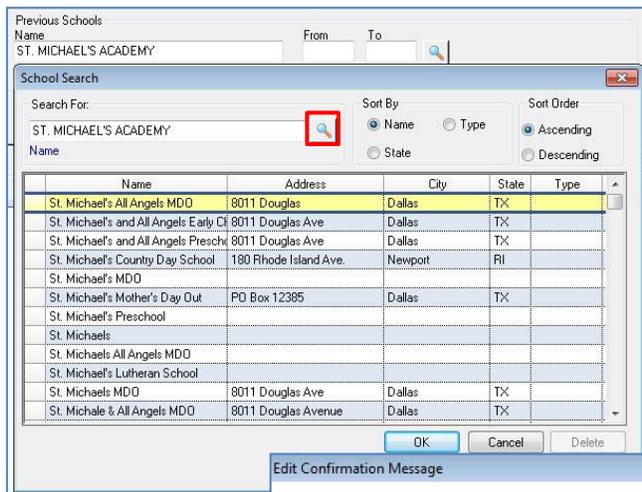
On the right side of Inquiry/Applicant Maintenance window (**Name** tab)
Errors/Warnings will be listed in red.

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

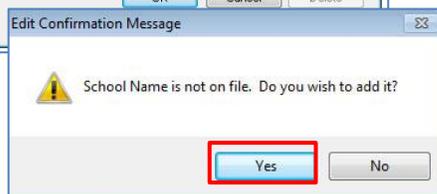


School Not on File (also applies to Referrals not on file)



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**

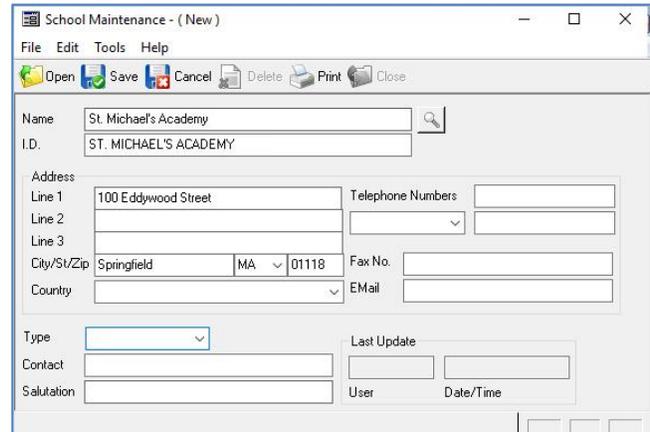


When prompted to add a new school

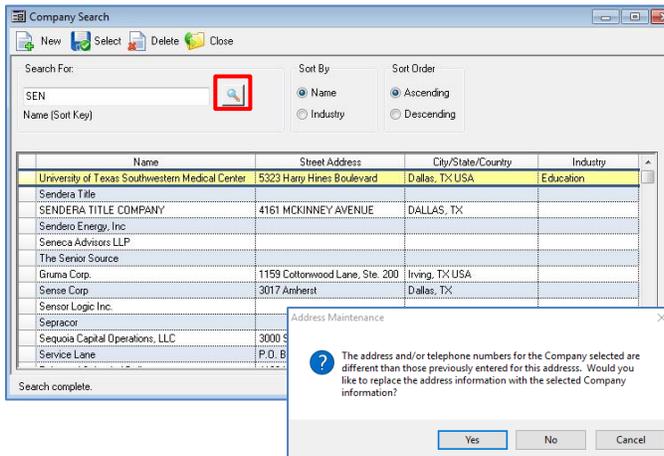
- Select **YES**

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

- Select **Save**



COMPANY NOT ON FILE

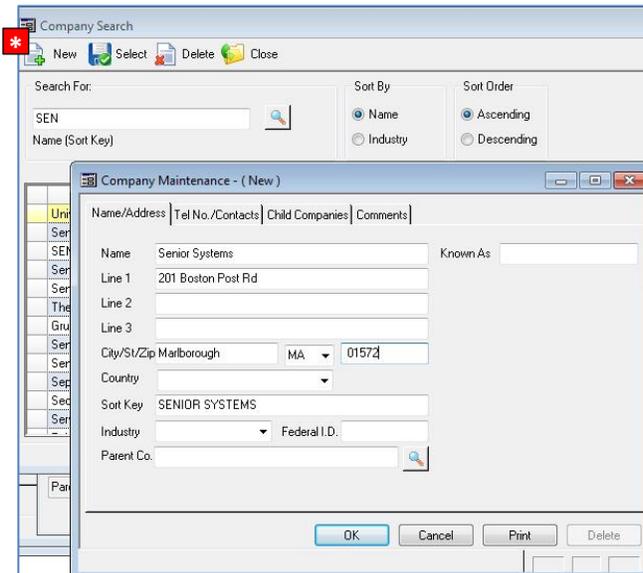


Name	Street Address	City/State/Country	Industry
University of Texas Southwestern Medical Center	5323 Harry Hines Boulevard	Dallas, TX, USA	Education
SENDERS TITLE COMPANY	4161 MCKINNEY AVENUE	DALLAS, TX	
Senders Energy, Inc.			
Senders Advisors LLP			
The Senior Source			
Gruha Corp.	1159 Cottonwood Lane, Ste. 200	Irving, TX, USA	
Sense Corp.	3017 Amherst	Dallas, TX	
Sensor Logic Inc.			
Sepracor			
Sequoia Capital Operations, LLC	3000 S		
Service Lane	P.O. B		

- Click on the magnifying glass to search for Company Name

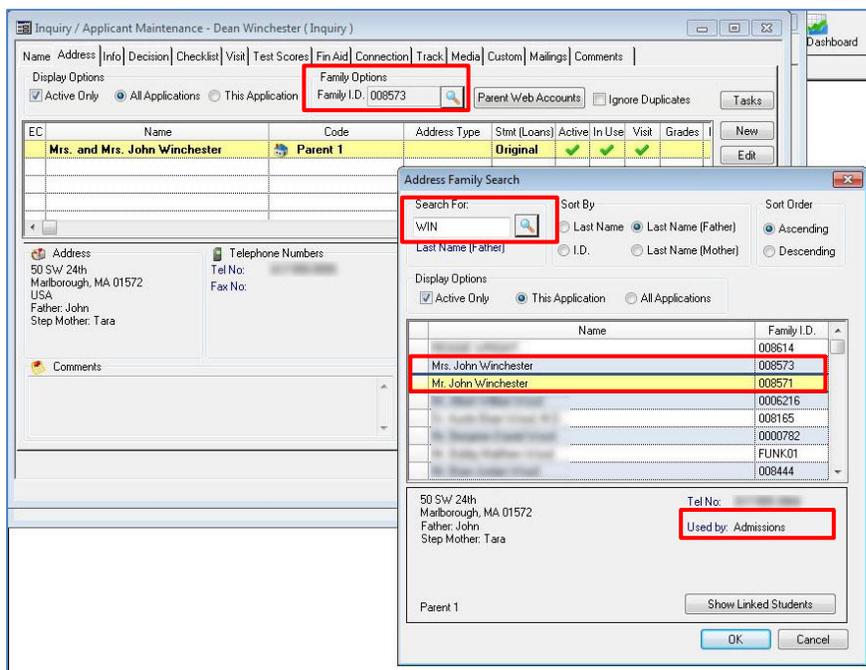
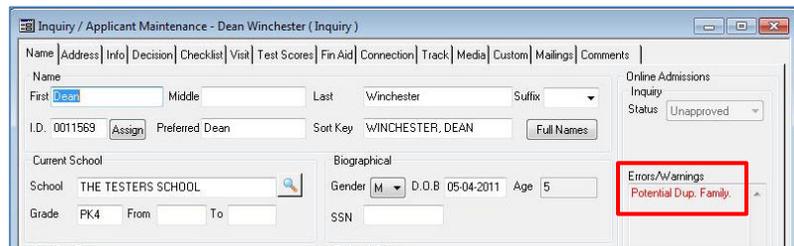
*TIP: If the Company name does not appear in table at first glance, shorten the Name in search field
Take time to keep data consistent!*

- 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**



POTENTIAL DUP. FAMILY

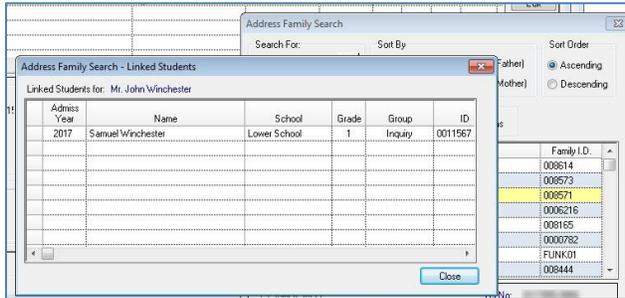
- An address already in the database has a first and last name match for either the Parent Name 1 or Name 2 field.
 - This may be another child of a parent already in the database
 - You will have the opportunity to link the records after examining all the data.
- Select the **Address** tab



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*



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

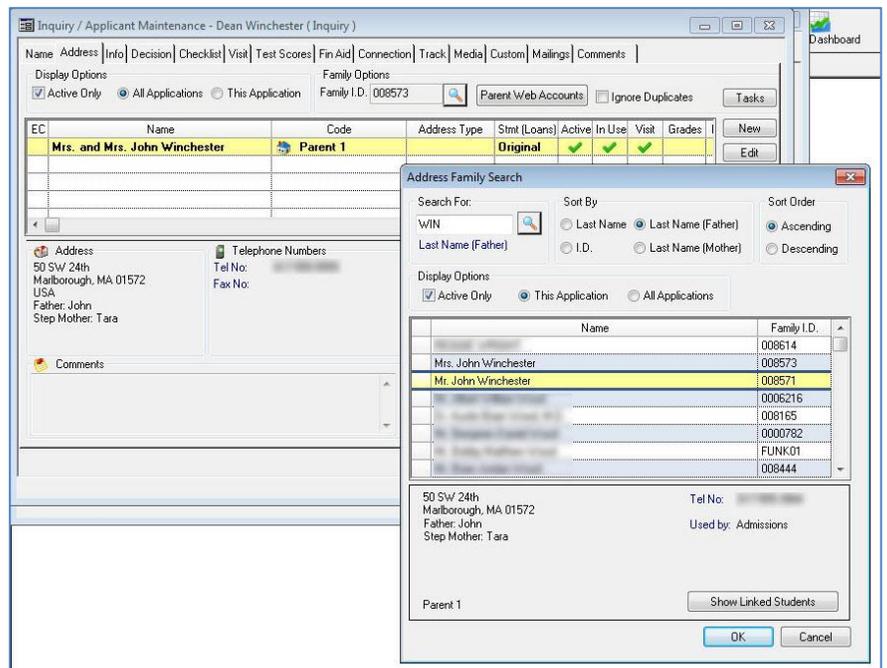
You note that Family 008571 and Family 008573 are the same family

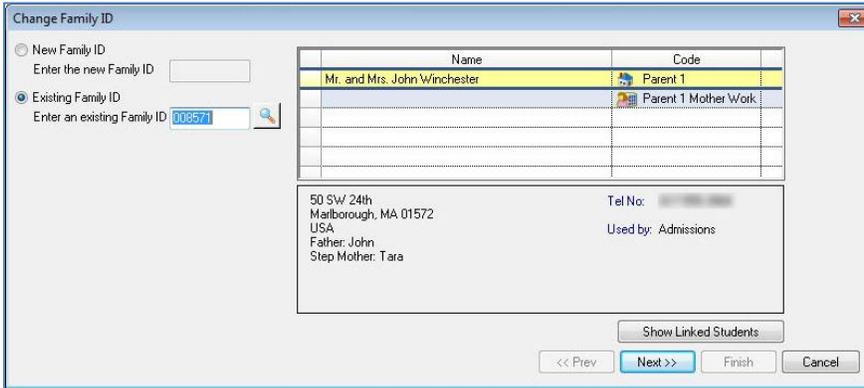
- Select Close

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**

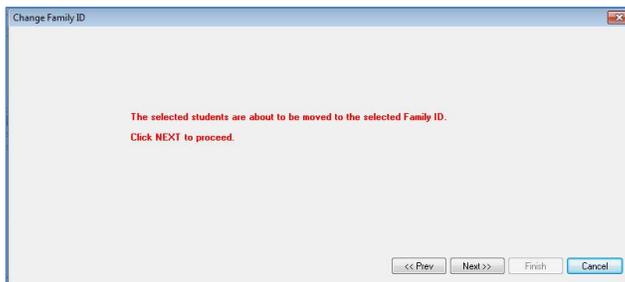




The 'Change Family ID' window has two radio buttons: 'New Family ID' and 'Existing Family ID'. The 'Existing Family ID' option is selected, and the text '008573' is entered in the adjacent field. Below this is a table with two columns: 'Name' and 'Code'. The first row contains 'Mr. and Mrs. John Winchester' and 'Parent 1'. The second row contains 'Parent 1 Mother Work'. Below the table is a text area with address and contact information: '50 SW 24th, Marlborough, MA 01572, USA, Father: John, Step Mother: Tara, Tel No.: [redacted], Used by: Admissions'. At the bottom are buttons for '<< Prev', 'Next >>', 'Finish', and 'Cancel', along with a 'Show Linked Students' button.

Change Family ID window

- Choose the Existing Family ID
- This ID will be assigned to student
- Choose **Next**



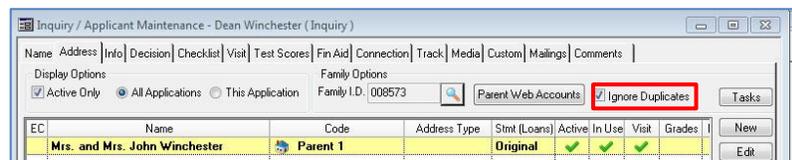
The 'Change Family ID' window displays a red warning message: 'The selected students are about to be moved to the selected Family ID. Click NEXT to proceed.' At the bottom are buttons for '<< Prev', 'Next >>', 'Finish', and 'Cancel'.

- Choose **Next** in Warning Box
- Click **Finish** as prompted

NOT A DUPLICATE FAMILY

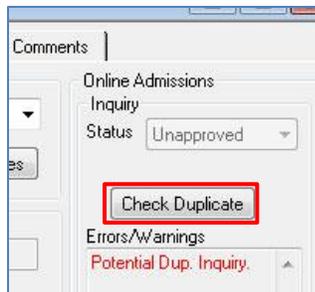
If you determine that no common sibling/address record exists:

- Select the **Ignore Duplicates** check box



The 'Inquiry / Applicant Maintenance - Dean Winchester (Inquiry)' window shows a table with columns: EC, Name, Address, Code, Address Type, Stmt (Loans), Active, In Use, Visit, Grades, and i. The first row contains 'Mrs. and Mrs. John Winchester', 'Parent 1', and 'Original'. Above the table, the 'Family I.D.' is '008573' and the 'Ignore Duplicates' checkbox is checked and highlighted with a red box.

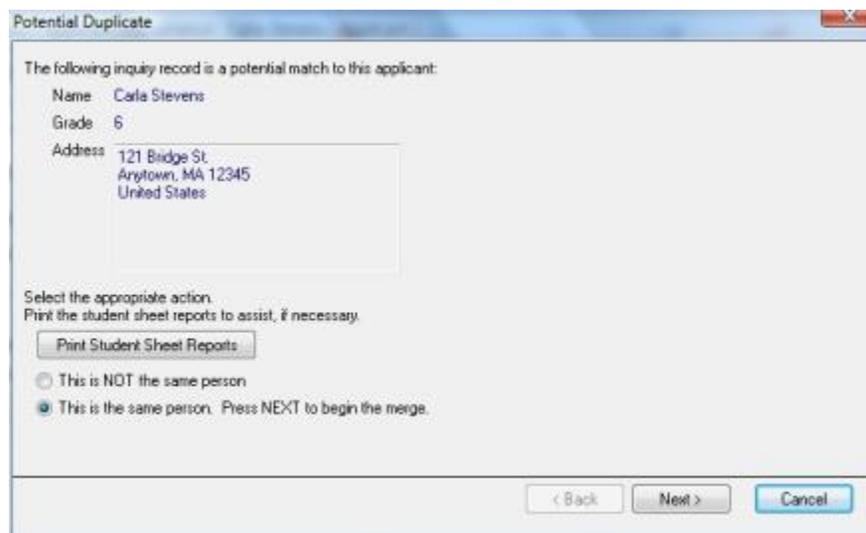
POTENTIAL DUP. INQUIRY



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

- Select **Check Duplicate**

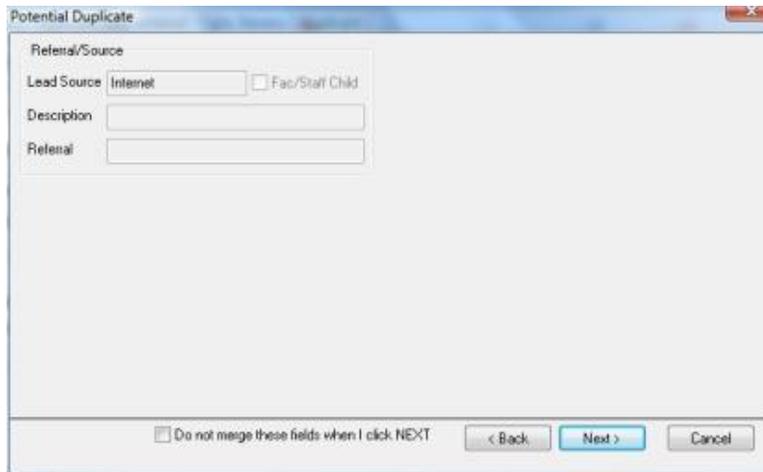
A wizard window opens, to walk you through the process of checking and potentially merging the duplicate record by displaying information from the existing record:



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:



If you **DON'T** want to merge this particular field, check the box at the bottom of the screen

Select **Next**

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:

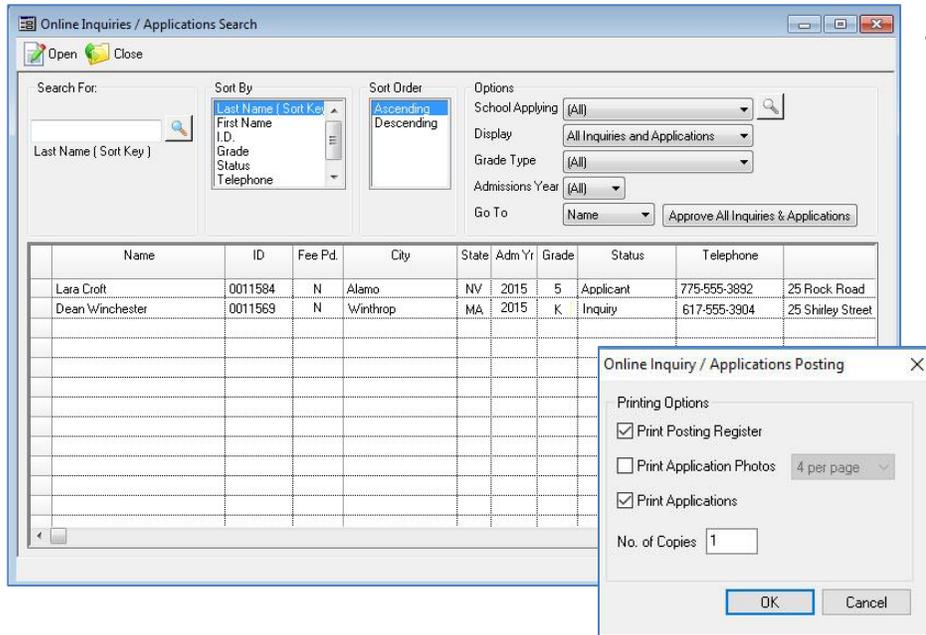


If you **DON'T** want to delete the previous inquiry record, check the appropriate box

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

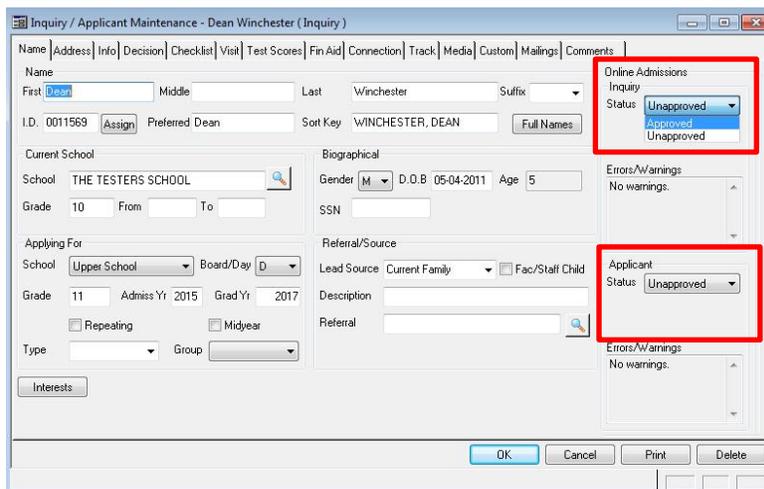
Once all warnings are cleared the record in the Online Inquiries/Applications Search window will be black.

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



Print Options:

- **Print Posting Register** prints a list of inquiry and applicants
- **Print applications** prints applications only. Inquiry forms are not printed



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 record with the most up-to-date family information. 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

- 1) 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 record with the most up-to-date family information. 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.