**Quick Reference: Transfer New Students to Development**

As you admit and enroll new students into your school, you can transfer them and their parents over to become constituents in Alumni/Development. This can only be done after these applicant records have been transferred as students to either Registrar and/or Accounts Receivable.

The trigger that tells the system when a transfer can be performed is when the applicant’s decision changes to ‘Enrolled’ (either entered manually, or set through processing in the Enrollment Management application), however, the Admissions Year for the applicant must also be less than or equal to the current year for the division as set in Registrar.

**NOTE:** If your school does not have the Advantage Admissions application installed, you will NOT be able to transfer student and parent records from Registrar or Accounts Receivable into Alumni/Development. In this case, you will need to enter all of the constituent records manually.

**To transfer a new student from Admissions into Alumni/Development:**

1. [Optional] In the Admissions application, open the applicant record and ensure that the Admissions Year is less than or equal to the current year as defined for the division in Registrar.
2. Go to the **Decision** tab and make sure the current decision is set to ‘Enrolled’.

![Decision Tab Image]

3. Open the Alumni/Development application, and click **Maintenance > New Families**.

   You can change the status of a record by clicking on the row to select it, and then clicking the **Never**, **Later** or **Now** button. Only records that are set to **Now** will be included in Alumni/Development. Records set to **Never** or **Later** will not be included.

![Maintenance New Families Image]
4. On the **New Constituents – Alumni Development** screen, select the appropriate values from the drop-down menus for **Parent Constituency**, **Student Constituency**, and **Other Constituency** and click **Transfer**.

5. Enter appropriate values for the **Constituent – Student Relationships** fields and click **OK**.

The student(s) and parent(s) are now transferred into the Alumni/Development application with the appropriate connections and relationships.