

# **Quick Reference: Enrollment Process**

## Please read the entire document before starting this process.

## **Question:**

What are the steps I need to take in order to get ready for our New Enrollment/Re-Enrollment Process?

#### Answer:

1. Clear Enrollment Data

When you are ready to start the process for building Enrollment Contracts you will clear the enrollment data from the previous year.

#### Maintenance > Clear Enrollment Data

**For students in the following schools** - Choose the schools you want to process enrollment contracts for.

Clear Financial Aid Types and Amounts - 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 if you wish to clear the Financial Aid fields. You only need to use this option if you are planning to put Financial Aid data into the actual Enrollment Contracts.

**Clear Next Year's Information** - Check this box to clear all enrollment data in the student and applicant records

Click the Clear button

2. Set the Next Year Enrollment Status field to Pending (or the appropriate choice for your school).

#### Maintenance > Global Updates

Select a category - **Student(Next Year)** Select an item to update - **Enrollment Status** Select those with this value - **(All)** Update to this value - **Pending** (*all records should start as pending*) Choose a query by clicking on the rolodex



NOTE: If no query exists for Re-Enrollment, create one with the following criteria

OR AR\_STUDENT AR\_GROUP = STUDENT

AND AR\_STUDENT CLASS\_YR != 20XX (current seniors class year)

For schools with Registrar use this criteria

OR RG\_STUDENT STUDENT\_GROUP = STUDENT

AND RG\_STUDENT CLASS\_YR != 20XX (current seniors class year)

Click **OK** – Review the printout and then Click **Yes** to complete the update.

3. Post data to records through the Enrollment Data Posting menu.

You can enter the following items through the Enrollment Data Posting screens

- Tuition amount
- Other amount
- Deposit amount or % of (Tuition Financial Aid Loans)
- Deposit Due date
- Install 1 Due date
- Install 2 Due date

Data can be entered on an individual basis or all at once by using the **Group** function.

#### For schools not using Online Enrollment

4. Build enrollment contract data from the Mailing menu

Once you have posted all the data you want to include on the contracts into the student's records, you are ready to print the contracts.

## Mailing > Enrollment Contracts

Click on the Build Merge File tab



If you want to include more than mailing information in the contracts, click the **Save All Data** option

Choose a query

List - Prints a list of names that are included in the current file to be built

**Build** - Allows you to save the file to the location where the Enrollment Contract document resides

Update - Inserts the date in the Contract Print field of the student's record

**Run WP** - launches your word processing program

**Close** - Closes the Enrollment Contract Mailing screen

After you have built the file, you will open the Enrollment Contract template document and link to the data file you just created. Continue with the mail merge.

5. Merge data to the your contract template (Word document)

# For schools using Online Enrollment

Please refer to the Online Enrollment User Guide **Pages 50-72** which describes in detail the process for creating and publishing Online Enrollment Contracts and Additional Forms.