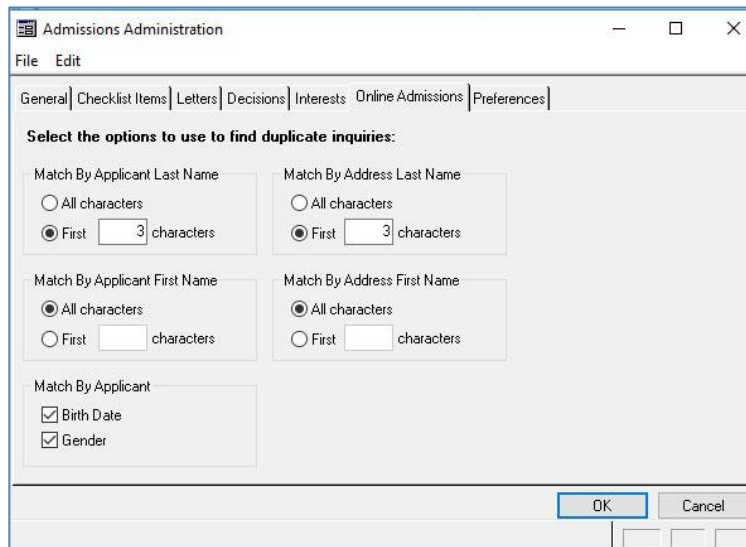


Quick Reference: Online Inquiry/Application Approval

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



Admissions Administration

File Edit

General Checklist Items Letters Decisions Interests Online Admissions Preferences

Select the options to use to find duplicate inquiries:

Match By Applicant Last Name

☐ All characters

☒ First 3 characters

Match By Address Last Name

☐ All characters

☒ First 3 characters

Match By Applicant First Name

☒ All characters

☐ First characters

Match By Address First Name

☒ All characters

☐ First characters

Match By Applicant

☒ Birth Date

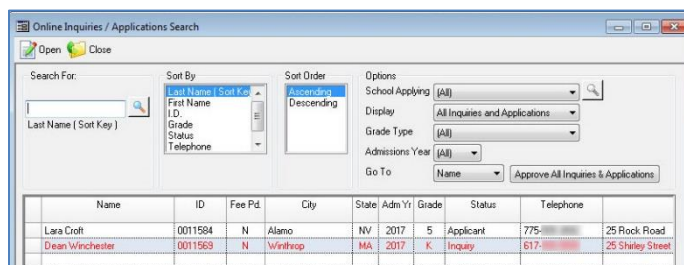
☒ Gender

OK Cancel

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.



Online Inquiries / Applications Search

Open Close

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 Shirley Street

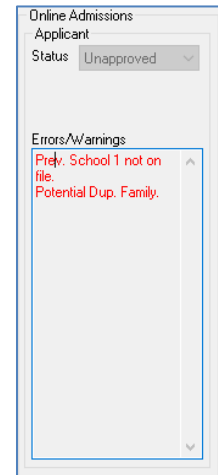
A red record indicates that there is data that is new or duplicated in the system already.

- Select a record in red

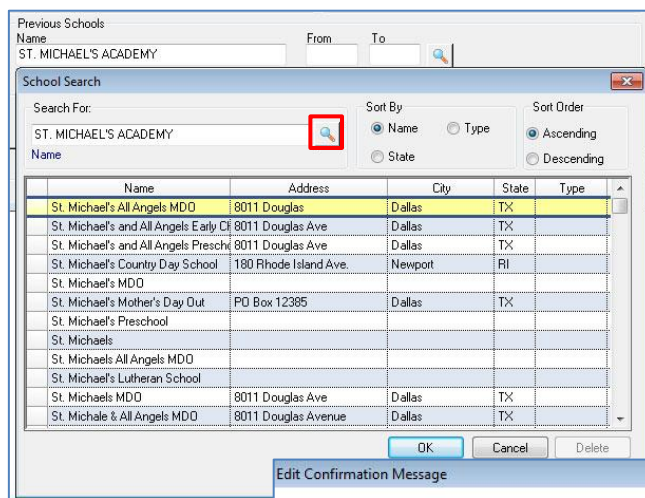
On the right side of Inquiry/Applicant Maintenance window (**Name** tab)
Errors/Warnings will be listed in red.

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



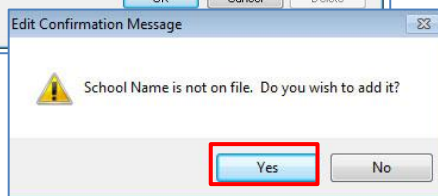
School Not on File (also applies to Referrals not on file)



Name	Address	City	State	Type
St. Michael's All Angels MDO	8011 Douglas	Dallas	TX	
St. Michael's and All Angels Early Cl	8011 Douglas Ave	Dallas	TX	
St. Michael's and All Angels Preschl	8011 Douglas Ave	Dallas	TX	
St. Michael's Country Day School	180 Rhode Island Ave.	Newport	RI	
St. Michael's MDO				
St. Michael's Mother's Day Out	PO Box 12385	Dallas	TX	
St. Michael's Preschool				
St. Michaels				
St. Michaels All Angels MDO				
St. Michael's Lutheran School				
St. Michael's MDO	8011 Douglas Ave	Dallas	TX	
St. Michale & All Angels MDO	8011 Douglas Avenue	Dallas	TX	

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**

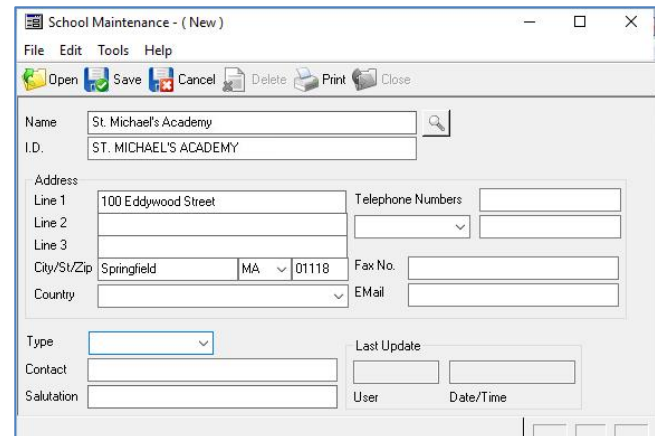


When prompted to add a new school

- Select **YES**

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

- Select **Save**



School Maintenance - (New)

File Edit Tools Help

Open Save Cancel Delete Print Close

Name: St. Michael's Academy

I.D.: ST. MICHAEL'S ACADEMY

Address:

Line 1: 100 Eddywood Street

Line 2:

Line 3:

City/St/Zip: Springfield MA 01118

Country:

Telephone Numbers:

Fax No.:

E-Mail:

Type:

Contact:

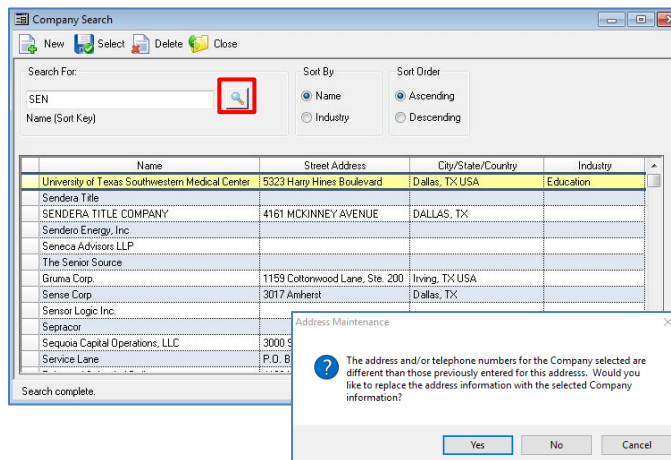
Salutation:

Last Update:

User:

Date/Time:

COMPANY NOT ON FILE



Company Search

New Select Delete Close

Search For: SEN

Name (Sort Key)

Sort By: Name

Sort Order: Ascending

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

Search complete.

Address Maintenance

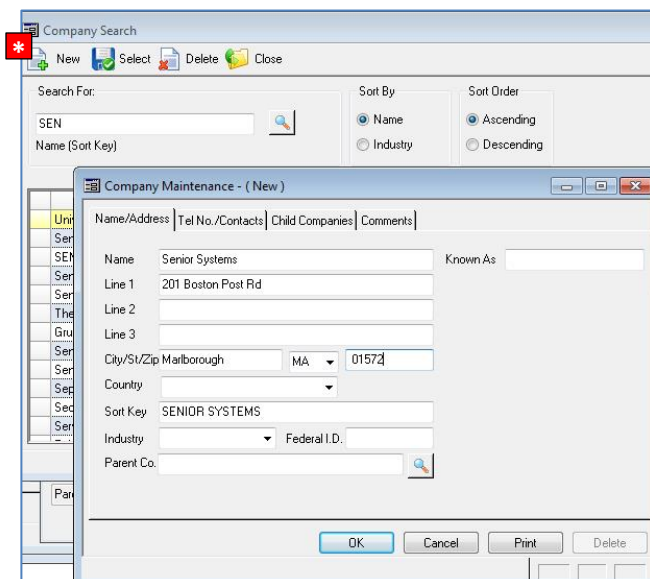
The address and/or telephone numbers for the Company selected are different than those previously entered for this address. Would you like to replace the address information with the selected Company information?

Yes No Cancel

- 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 Search

New Select Delete Close

Search For: SEN

Name (Sort Key)

Sort By: Name

Sort Order: Ascending

Company Maintenance - (New)

Name/Address | Tel No./Contacts | Child Companies | Comments

Name: Senior Systems

Known As:

Line 1: 201 Boston Post Rd

Line 2:

Line 3:

City/St/Zip: Marlborough MA 01572

Country:

Sort Key: SENIOR SYSTEMS

Industry:

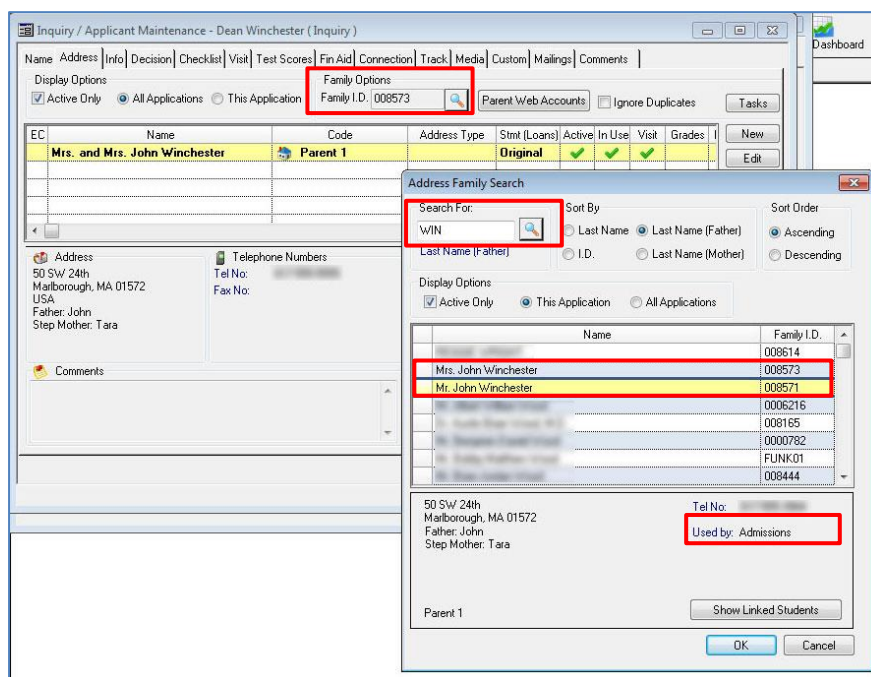
Federal I.D.:

Parent Co.:

OK Cancel Print Delete

POTENTIAL DUP. FAMILY

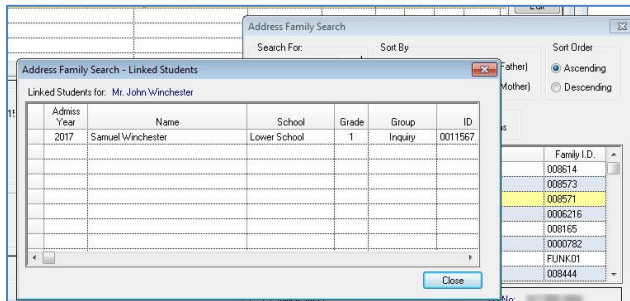
- An address already in the database has a first and last name match for either the Parent Name 1 or Name 2 field.
 - This may be another child of a parent already in the database
 - You will have the opportunity to link the records after examining all the data.
- Select the **Address** tab

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*



Address Family Search - Linked Students

Search For: _____ Sort By: _____ Sort Order: ☒ Ascending ☐ Descending

Linked Students for: Mr. John Winchester

Admiss Year	Name	School	Grade	Group	ID
2017	Samuel Winchester	Lower School	1	Inquiry	0011567

Family I.D. list: 008614, 008573, 008571, 0086216, 008185, 0000782, FUNK01, 008444

Close

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

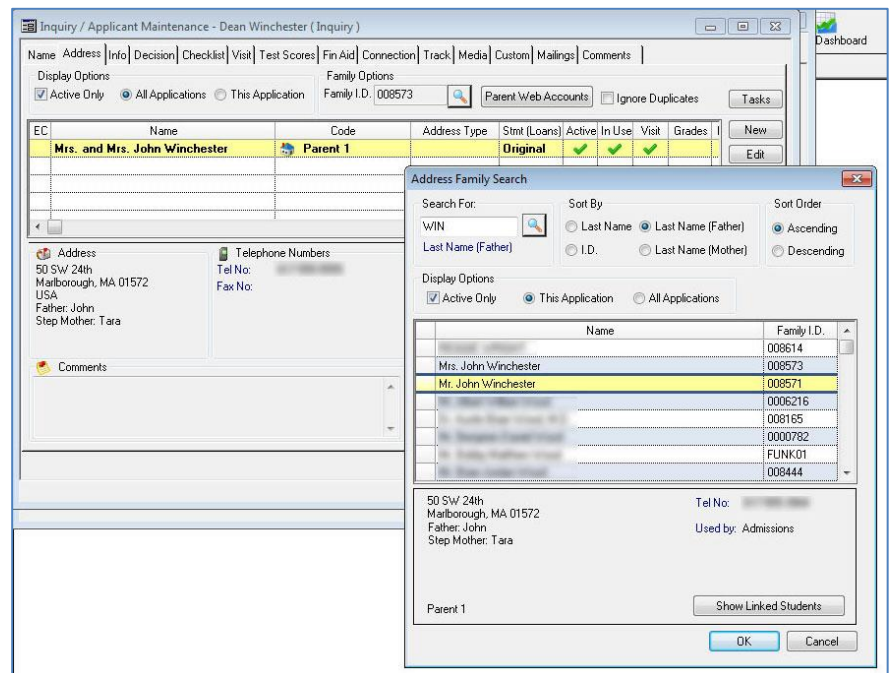
You note that Family 008571 and Family 008573 are the same family

- 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**



Inquiry / Applicant Maintenance - Dean Winchester (Inquiry)

Display Options: ☒ Active Only ☒ All Applications ☐ This Application

Family Options: Family I.D. 008573 ☐ Parent Web Accounts ☐ Ignore Duplicates

EC	Name	Code	Address Type	Stmnt (Loans)	Active	In Use	Visit	Grades	New
	Mrs. and Mrs. John Winchester	Parent 1	Original		☒	☒	☒		Edit

Address: 50 SW 24th, Marlborough, MA 01572, USA
Father: John, Step Mother: Tara

Telephone Numbers: Tel No: _____, Fax No: _____

Comments: _____

Address Family Search

Search For: WIN Last Name (Father) Last Name (Mother) I.D.

Sort By: Last Name (Father) Last Name (Mother) I.D.

Sort Order: ☒ Ascending ☐ Descending

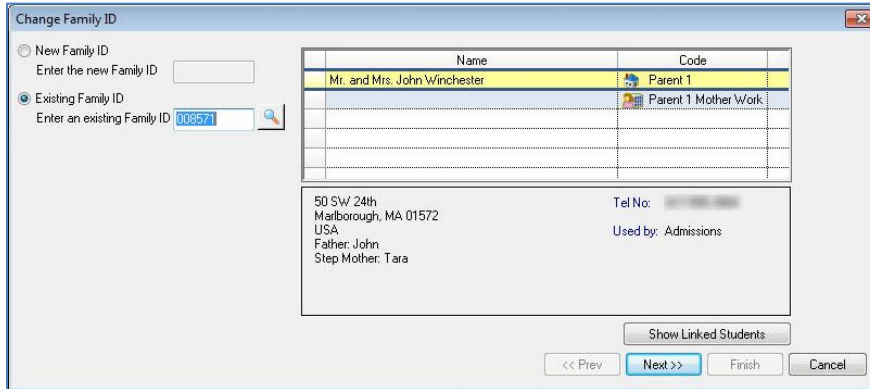
Display Options: ☒ Active Only ☒ This Application ☐ All Applications

Name	Family I.D.
Mrs. John Winchester	008614
Mr. John Winchester	008573
	0086216
	008185
	0000782
	FUNK01
	008444

50 SW 24th, Marlborough, MA 01572
Father: John, Step Mother: Tara

Tel No: _____ Used by: Admissions

Parent 1



Change Family ID

☐ New Family ID
Enter the new Family ID

☒ Existing Family ID
Enter an existing Family ID: 008571

Name	Code
Mr. and Mrs. John Winchester	Parent 1
	Parent 1 Mother Work

50 SW 24th
Marlborough, MA 01572
USA
Father: John
Step Mother: Tara

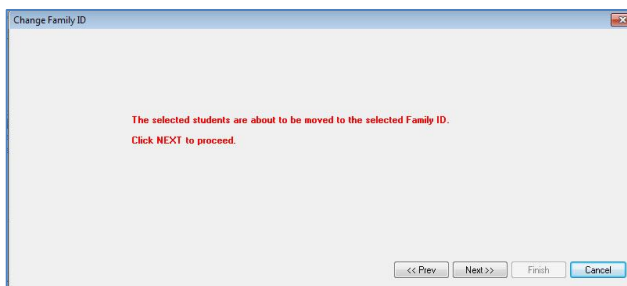
Tel No: [REDACTED]
Used by: Admissions

Show Linked Students

<< Prev Next >> Finish Cancel

Change Family ID window

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



Change Family ID

The selected students are about to be moved to the selected Family ID.
Click NEXT to proceed.

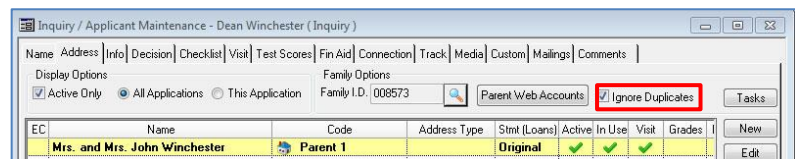
<< Prev Next >> Finish Cancel

- 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



Inquiry / Applicant Maintenance - Dean Winchester (Inquiry)

Display Options: ☒ Active Only ☒ All Applications ☐ This Application

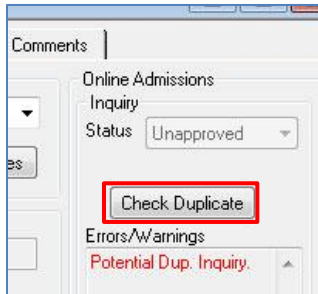
Family Options: Family I.D.: 008573

Parent Web Accounts: ☒ Ignore Duplicates

EC	Name	Code	Address Type	Stmnt (Loans)	Active	In Use	Visit	Grades	
	Mrs. and Mrs. John Winchester	Parent 1		Original	✓	✓	✓		

New Edit

POTENTIAL DUP. INQUIRY

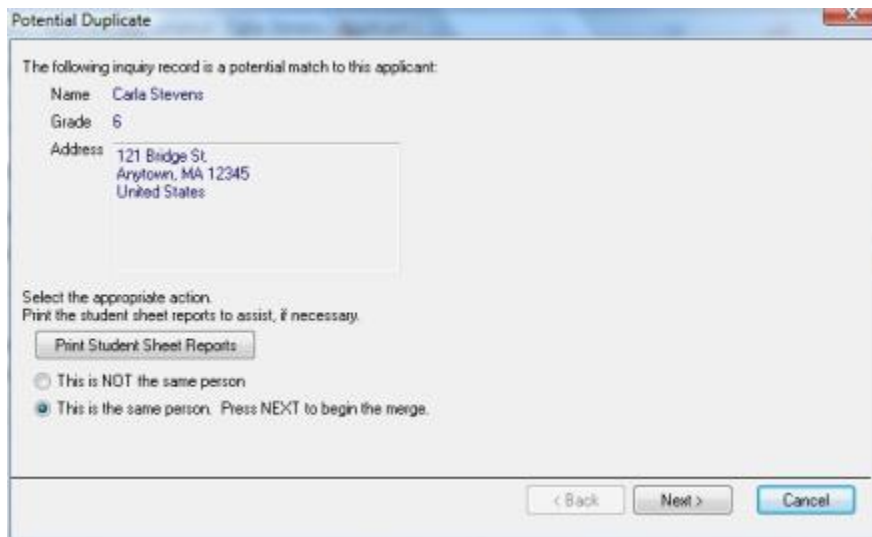


The screenshot shows a web form titled 'Online Admissions Inquiry'. The 'Status' dropdown is set to 'Unapproved'. Below the status, there is a red-bordered button labeled 'Check Duplicate'. Underneath the button, the 'Errors/Warnings' section displays 'Potential Dup. Inquiry.' in red text.

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:



The 'Potential Duplicate' wizard window displays the following information:

The following inquiry record is a potential match to this applicant:

Name: Carla Stevens
Grade: 6
Address: 121 Bridge St.
Arytown, MA 12345
United States

Select the appropriate action.
Print the student sheet reports to assist, if necessary.

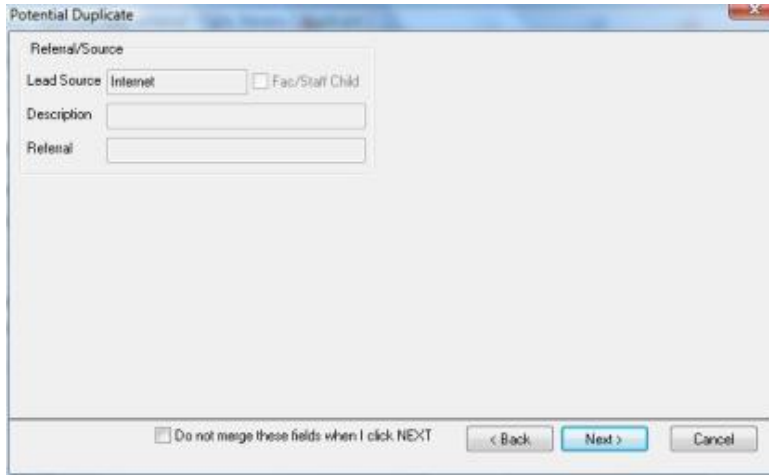
☐ This is NOT the same person
☒ This is the same person. Press NEXT to begin the merge.

< Back Next > Cancel

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:

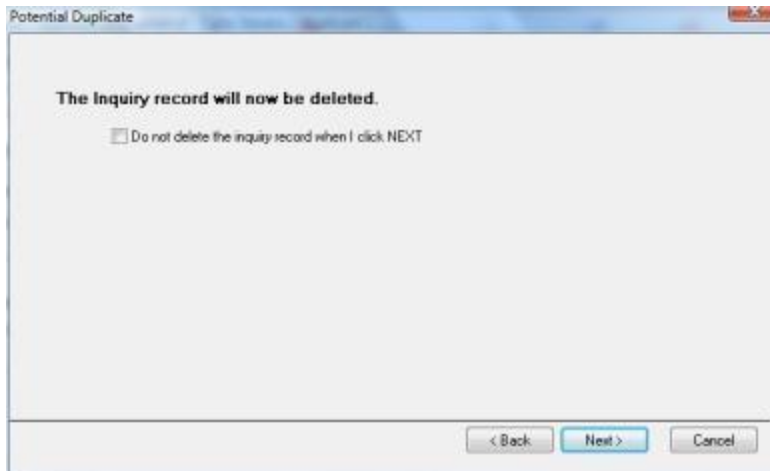


If you **DON'T** want to merge this particular field, check the box at the bottom of the screen

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:

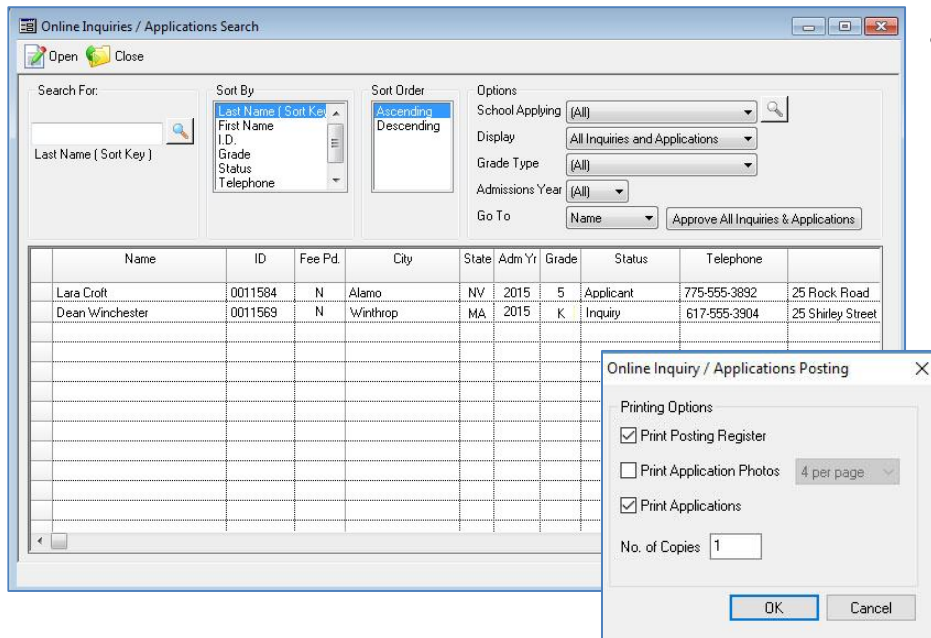


If you **DON'T** want to delete the previous inquiry record, check the appropriate box

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*



Online Inquiries / Applications Search

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	2015	5	Applicant	775-555-3892
Dean Winchester	0011569	N	Winthrop	MA	2015	K	Inquiry	617-555-3904

Online Inquiry / Applications Posting

Printing Options

☒ Print Posting Register

☐ Print Application Photos 4 per page

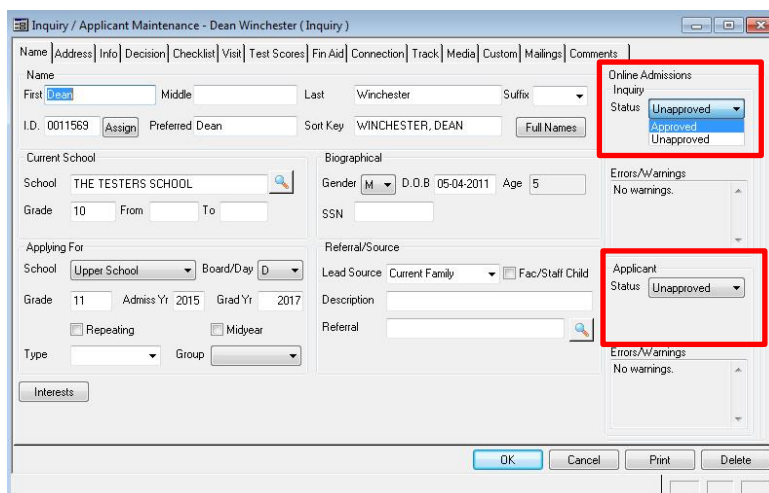
☒ Print Applications

No. of Copies 1

OK Cancel

Print Options:

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



Inquiry / Applicant Maintenance - Dean Winchester (Inquiry)

Name: First (Dean), Middle, Last (Winchester), Suffix

I.D.: 0011569, Assign, Preferred Dean, Sort Key: WINCHESTER, DEAN, Full Names

Current School: THE TESTERS SCHOOL, Grade: 10, From, To

Applying For: School (Upper School), Board/Day (D), Grade (11), Admiss Yr (2015), Grad Yr (2017), Type, Group

Biographical: Gender (M), D.O.B (05-04-2011), Age (5), SSN

Referral/Source: Lead Source (Current Family), Fac/Staff Child, Description, Referral

Online Admissions Inquiry Status: Unapproved

Applicant Status: Unapproved

Errors/Warnings: No warnings.

OK Cancel Print Delete

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.