

## Quick Reference: Paper Contract Enrollment/Re-Enrollment Process

Review the steps necessary to enroll or re-enroll students into your school using the Paper Contract Enrollment process. To perform a successful enrollment or re-enrollment procedure, you will need to clear enrollment data, set the next year enrollment status field to pending, and then build enrollment contract data from the mailing menu and merge the data to your contract template.

## To perform the Paper Contract Enrollment/Re-Enrollment process:

 When you are ready to begin the process of building Enrollment Contracts, you will first need to clear enrollment data from the previous year. To do this, login to the Enrollment Management application and click Maintenance > Clear Enrollment Data. The Clear Enrollment Data screen appears.

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Make sure that no other users a Registrar system and you have	are in the Acc	ounts R	eceivable or
For all adopts in the following of	-heeler	Aup Dei	ore proceeding
Middle School	choois.	3	
Upper School			
SA Daycare	=		
Billing	1		
<ul> <li>Athletics</li> </ul>	-		
This will clear all enrollment field	ds for student	s in sele	cted schools.
Clear Einancial Aid Turce an	d Amounto		
Clear Financial Alu Type an	d Amounts		
	Clea	r i	Cancel

Before you clear any contracts from last year's records, make sure that there are no other users in the Accounts Receivable or Registrar applications. Also, ensure that you have taken a current backup before clearing any records.



2. Check or uncheck the schools from which you would like to clear last year's Enrollment contracts. This will clear all enrollment fields for students in the selected schools.

You can also select the Clear Financial Aid Type and Amounts checkbox. This clears all Financial Aid records from the previous year for the schools selected above. You only need to use this option if you are planning to enter Financial Aid data into Enrollment Contracts.

## **IMPORTANT:**

Before performing the **Clear Financial Aid Type and Amounts** operation, make sure that the **End of Year** process has been performed in the Financial Aid application. Also, make sure that no Financial Aid Awards have been entered in the previous year, because they will be cleared when you perform the Clear Financial Aid Type and Amounts operation. You only need to use this option if you are planning to put Financial Aid data into the actual Enrollment Contracts.

When you select the Clear Financial Aid Type and Amounts checkbox, the Clear Next Year's Information checkbox appears. This checkbox will clear all enrollment data in the student and applicant records. Usually you want to click this so that only Next Year Data is cleared.

Clear Enrollment Data	
File	
Make sure that no other users a Registrar system and you have For students in the following so	are in the Accounts Receivable or a current backup before proceeding chools:
Middle School	×
✓ Upper School	
SA Daycare	E
✓ Billing	
✓ Athletics	-
This will clear all enrollment field	ds for students in selected schools.
🔽 Clear Financial Aid Type an	d Amounts
🔽 Clear Next Year's Informatio	n
	Clear Cancel
	NUM



When you have selected the necessary options, click **Clear** to remove the necessary data. You receive the Update Confirmation Message screen. Click **Yes** to confirm that you want to perform this operation.

Update Co	nfirmation Message
<b></b>	The Enrollment Contract Clear is about to be performed! Are you sure you wish to continue?
	Yes No

3. Click Maintenance > Global Updates.

Global Updates for	Enrollme	nt Management		D	K
Select a category:		Student(Next Year)		~	•
Select an item to up	pdate:	Enrollment Status		~	•
Select those with th	nis value	(All)	*	In Process	
Update to this valu	е	Pending	~		
Query List	Current SI	tudents Nevt Year			
ALLSTO	Cullent 5			<u>~</u>	
			ОК	Cancel	)

Specify the following fields on the **Global Updates for Enrollment Management** screen:

Select a category: Student(Next Year) Select an item to update: Enrollment Status Select those with this value: (All) Update this value: Pending

**Note:** If no query exists, you must create one by clicking the magnifying glass icon ( ) and clicking **New** on the **Query List (Global Updates for Enrollment Management)** screen.

The re-enrollment query should contain the following criteria:

```
OR AR_STUDENT AR_GROUP = STUDENT
AND AR_STUDENT CLASS_YR != 2013
```



For schools with Registrar, the query should contain the following criteria:

## OR RG\_STUDENT STUDENT\_GROUP = STUDENT AND RG\_STUDENT CLASS\_YR != 2013

nditions	Sorting Add Befo	xe Add After Delete Form	ula Cyt Re	ows Copy Rows Paste Rows
And/Or	Table Name	Field / Formula Name	Operator	Value
OR	RG_STUDENT	STUDENT_GROUP	-	STUDENT
AND	RG_STUDENT	CLASS_YR	1-	2013

Once you have entered the correct criteria for the query, click **OK**. Then navigate to the Global Updates for Enrollment Management screen by click **Maintenance** > **Global Updates**. Highlight the query on the **Query List** screen and click **OK**.

4. The query that you created now appears on the Global Updates for Enrollment Management screen. Click **OK** to perform the Global Update operation.

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You receive a message stating the number of items selected. Click **OK**.

lates for Enrollment Ma	nagem
Number of items selec	ted is 3445.
bo you wish to contin	ue:

The Global Updates for Enrollment Management screen appears displaying all of the new values assigned to student's records. Click **Yes** on the Update Confirmation Message screen to confirm the changes.

Update Co	nfirmation Message
<u> </u>	Select YES to proceed with the Update, otherwise select NO.
	Yes No

The changes are processed on the Global Updates for Enrollment Management screen. You can see the speed of the progress in the blue bar. Click **OK** once all of the changes have processed.

Select a category:	Student(Next Year)				
Select an item to update:	Enrollment Statu	\$			
Select those with this value	(All)	•	In Process		
Update to this value	Pending	•	100%		
Query List					
ENROLL_C ENROLL	_C		٩,		

**NOTE**: You can now perform a Data Posting operation. For more information about Data Posting, see the *Enrollment Management System Reference Guide*.



5. Once the Global Updates have been completed, you may optionally use the Enrollment Data Posting screens if you have amount and date fields you would like included as merge fields on the contract.

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

ID	Name	Grade	Tuition	Deposit	Deposit Due	Installment 1 Due	Installment 2 Due	1
0001002	Paul Jones		600.00	50.00	12-27-2012	12-27-2012	12-27-2012	
ADAI003	Aaron Wilson		700.00	50.00	12-27-2012	12-27-2012	12-27-2012	
ANDE033	Andrea Connors		1,200.00	200.00	12-27-2012	12-27-2012	12-27-2012	
ALDR011	Alex Smith		6,788.00	345.00	12-27-2012	12-27-2012	12-27-2012	
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To begin the mail merge process to print the contracts, click **Enrollment Contracts** > **By Student** or **By Family**. **By Student** creates one contract per each student. **By Family** creates one contract per family. Data can be entered on an individual basis or all at once by using the Group function.



6. Enter the necessary information on the **Labels/Envelopes** tab. For more information about the fields in the **Labels/Envelopes** tab, see the *Enrollment Management System Reference Guide*.

Options  Show Count  Exclude Blank Addresses  Include Active Addresses Only  Include Send Mail Only  Include Send Contract Only	Output Type Form Type Start at Label Row 1 Column	Form Options	
New Students Admissions Year 2012 - Existing Students	Query List Select Students Select Addresses	(All) (All)	·) _
Student Group	Sorting conditions Print Date	(Default Sort)	•
(All) • Q School			

7. When you have entered all of the necessary information on the Labels/Envelopes tab, click the Build Merge File tab to produce a text file (\*.txt) to use with your word processing program's mail merge function. You can include more than just mailing information in the merge document by selecting the Save All Data, Include Send Mail Only and Include Send Contact Only options. For more information about the fields in the Build Merge File tab, see the Enrollment Management System Reference Guide.

Options  Show Count  Exclude Blank Addresses  Include Active Addresses Only  Include Send Mail Only  Include Send Contract Only	Output Type Save only Mailing Data Save All Data	☑ Insert Field Names (Header)	
New Students Admissions Year 2012 Existing Students Show Next Year's Information Student Group (All) School Include Work Addresses	Query List Select Students Select Addresses Sorting conditions Print Date	(All) (All) (Default Sort) 03-19-2013	• •
Group  (All)  School  Include Work Addresses  Include P2 Information		03-15-2013	



8. When you have entered all of the necessary information into the Build Merge File tab, click Build. If you have selected the Show Count checkbox on the Build Merge File tab, the Enrollment Contracts screen appears displaying the number of items selected. Click Yes to proceed with the build process.



9. Specify the file name and directory in which to save the .txt file. The file name defaults to SENIORWP.TXT. Rename this file, or save the file with the default name, and remember the directory location where you are saving this file.

Save in: 🚢 OS (C:)	- G 🤌 📂 🛄-
Name	Date modified
SRecycle.Bin	6/29/2012 5:38 PM
Apps .	2/14/2012 12:07 AM
鷆 Centura	9/10/2012 4:18 PM
퉬 crystal	10/16/2012 1:20 PM
퉬 dell	2/15/2012 2:13 PM -
< [	•
File name: SENIORWP.TXT	Save
Save as type: Text Files (* tyt)	Cancel

- 10. Click **Save** on the Save Merge File screen.
- 11. Open your Word Processing program to build the merge data file.

**NOTE:** These instructions are only valid for Microsoft Word 2010.

12. In Word, click **File** > **Open** and browse to the directory where you saved your merge file. Open your merge file in Word.



13. To perform the mail merge process in Word 2010, click the **Mailings** menu > **Start Mail Merge** > **Step-by-Step Mail Merge Wizard...** 



14. The Mail Merge menu bar appears on the right side of the screen. Select the **Letters** radio button, or the appropriate button that corresponds to your mail merge.







15. Once you have selected the document, click Next: Select Recipients.



16. Select your recipients and click Next: Write your letter, or select an existing contract.





17. Write your contract if you have not already done so and click **Next: Preview your letters**.



18. Set your recipients and click Next: Complete the merge.

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File Home Insert Page Layout References Mailings Review View Acrobat	۵ 🚱
invelopes Labels Start Mail Selet Edit Merge Start Mail Merge Create	Image: Second
Dear StuFullName,         StuFullNameAlt you have been accepted to SchoolSalutation for AdmissionsYr. Congrational on your successful application to SchoolSalutation. Please reply to accept or reject this invitation by the end of your current school year. Reply by email or send a letter to:         SchoolSalutation         SchoolSalutation	Mail Merge    Preview your letters  One of the merged letters is previewed here. To preview another letter, click one of the following:  Find a recipient: 1  Find a recipient 1  Cut an also change your recipient list:  Cut and this recipient  When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.
Sincerely, SchoolSalutation	* Step 5 of 6 * Previous: Write your letter
Page: 1 of 1   Words: 49   🎸	



19. Click Print...

W J J → U L I → Document5 - Microsoft Word	
File Home Insert Page Layout References Mailings Review View Acrobat	۵ ۵
Envelopes Labels Create Create Creat	N I I P N Find Recipient Auto Check for Errors Preview Results Finish & Arrobat
😰 - Spanner recent for each strainer s	Mail Merge 🗸 🗙
Dear StuFullName, StuFullNameAlt you have been accepted to SchoolSalutation for AdmissionsYr. Congrational on your successful application to SchoolSalutation. Please reply to accept or reject this invitation by the end of your current school year. Reply by email or send a letter to: SchoolSalutation SchoolSalutation SchoolSalutation SchoolSalutation Sincerely, SchoolSalutation	Complete the merge Mail Merge is ready to produce your letters. To personalize your letters, click "Edit Individual Letters." This will open a new document with your merged letters. To make changes to all be the second to the orignal document. Herge Edit individual letters  Step 6 of 6 Previous: Preview your letters
4 H	>
Page: 1 of 1   Words: 49   🍏	

20. Once the contracts have printed, go back to the Build Merge File tab on the Enrollment Contracts screen and click **Update** to establish the **Contract Print** timestamp on the student record.

Options  Show Count  Exclude Blank Addresses  Include Active Addresses Only  Include Send Mail Only  Include Send Contract Only	Output Type Save only Mailing Data Save All Data	✓ Insert Field Names (Header)	
New Students Admissions Year 2012  Existing Students Show Next Year's Information Student Group (AII) School Include Work Addresses Include P2 Information	Query List Select Students Select Addresses Sorting conditions Print Date	(All) (All) (Default Sort) 03-19-2013	• « • « • «



21. Click **Maintenance > Students** to view the **Contract Print** timestamp.

General Inform	ation	•	· ·		Withdrawn Information
Current School	Upper School	Next School	Upper School 🗸	D.O.B. 09-23-1994	W/D Grade
Current Grade	IV 📃 Repeating	Next Grade	V	Age 18	W/D School 🗸
уре		Student Group	Student -	SSN	W/D Date
Admiss Yr.	1991 🔲 Mid Year	A/R Group	Student -	Gender M 💌	Re-Enter Date
Class Yr.	2013	Status	Pending -	Tuition Refund Insurance	w/D Year
Fac/Staff C	hild	Board/Day	D - ESL	Accident Insurance	W/D Type
Contract Contract Print	03-19-2013	Rec'd N	■ Date		W/D Reason
Cont/Dep Due		Rec'd N	■ Date	Deposit Amount 0.00	
nstall 1 Due			Install 2 Due	Discount Amount 0.00	

22. When contracts are returned to the school, you can click **Maintenance** > **Students** and update the student's enrollment status and enter the contract, deposit and date fields as appropriate.

General Information				Withdrawn Information
Current School Abrams Hebrew A	Acac Next School	Lower School 🗸	D.O.B.	W/D Grade
Current Grade 1 📃 🕅 Repe	ating Next Grade	2	Age	W/D School 🗸
Гуре	- Student Group		SSN	W/D Date
Admiss Yr. 2012 🕅 Mid Yr	ear A/R Group		Gender M 🔻	Re-Enter Date
Class Yr. 2023	Status	Accepted -	Tuition Refund Insuranc	e W/D Year
Fac/Staff Child	Board/Day	D 🔻 🗆 ESL	Accident Insurance	W/D Tupe
Contract				W/D Beason
Contract Print 03-19-2013	Rec'd Y	<ul> <li>Date 03-19-2013</li> </ul>		W/D Heason
Cont/Dep Due 03-19-2013	Rec'd Y	- Date 03-19-2013	Deposit Amount 100	
nstall 1 Due		Install 2 Due	Discount Amount 0.00	
nstall 1 Due		Install 2 Due	Discount Amount 0.00	