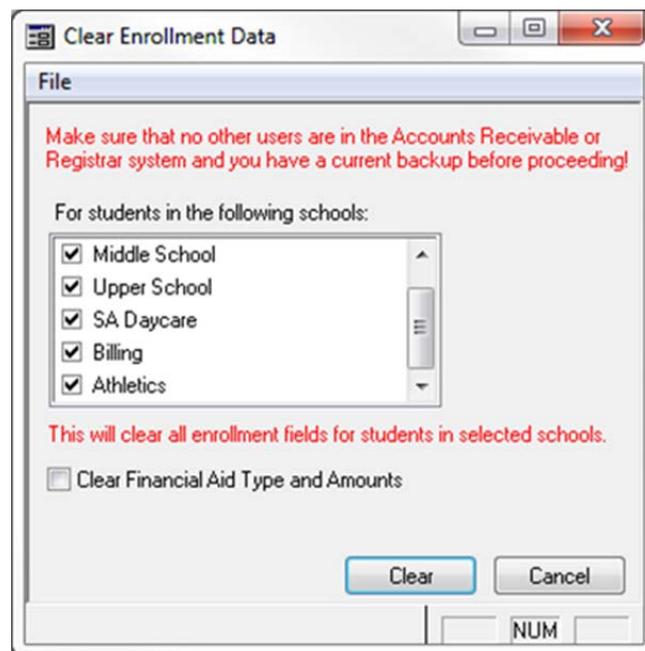


Quick Reference: Paper Contract Enrollment/Re-Enrollment Process

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:

1. 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.



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.

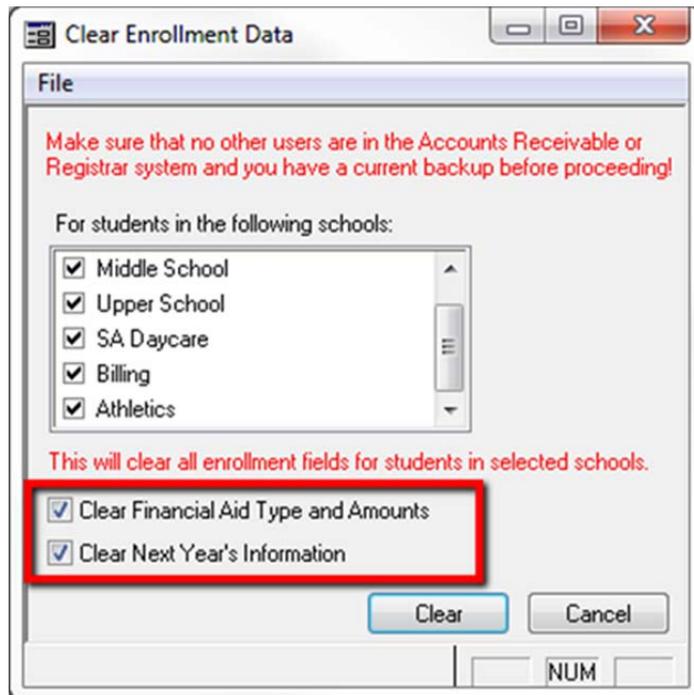
2. Check or uncheck the schools from which you would like to clear last year's Enrollment contracts. This will clear all enrollment fields for students in the selected schools.

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.

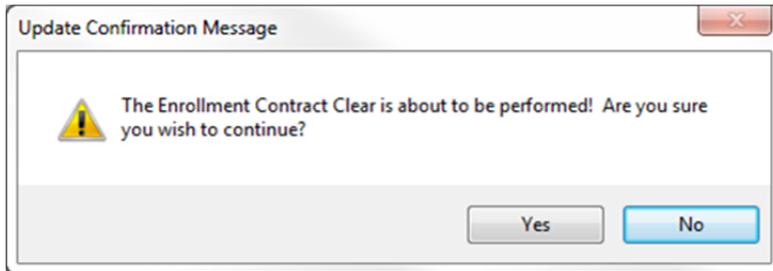
IMPORTANT:

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.

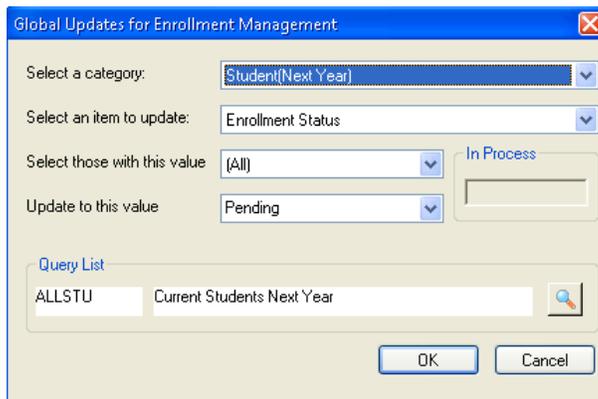
When you select the Clear Financial Aid Type and Amounts checkbox, the Clear Next Year's Information checkbox appears. This checkbox will clear all enrollment data in the student and applicant records. Usually you want to click this so that only Next Year Data is cleared.



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.



3. Click **Maintenance > Global Updates**.



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

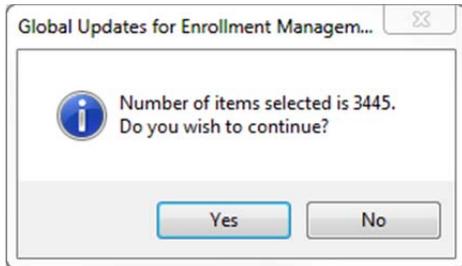
- Select a category:** Student(Next Year)
- Select an item to update:** Enrollment Status
- Select those with this value:** (All)
- Update this value:** Pending

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.

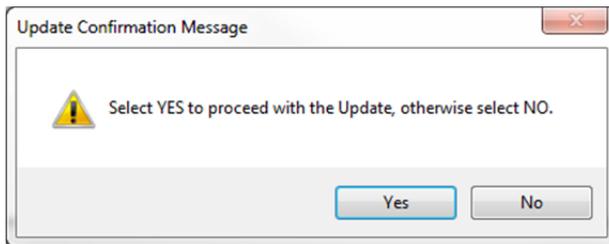
The re-enrollment query should contain the following criteria:

OR AR_STUDENT AR_GROUP = STUDENT
AND AR_STUDENT CLASS_YR != 2013

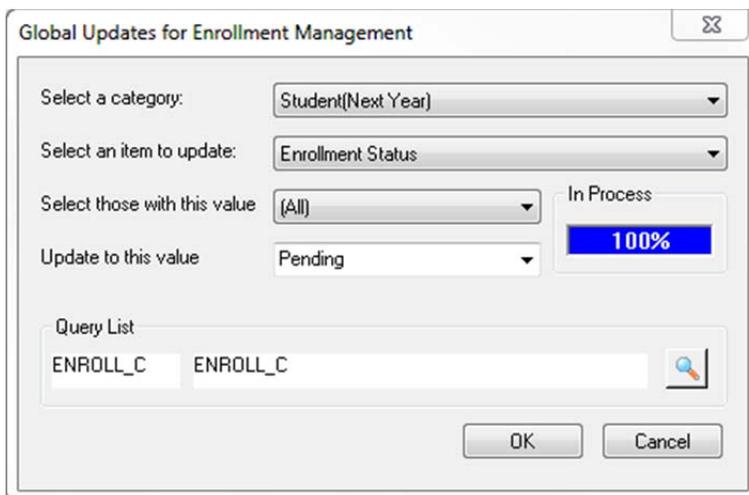
You receive a message stating the number of items selected. Click **OK**.



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.



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.

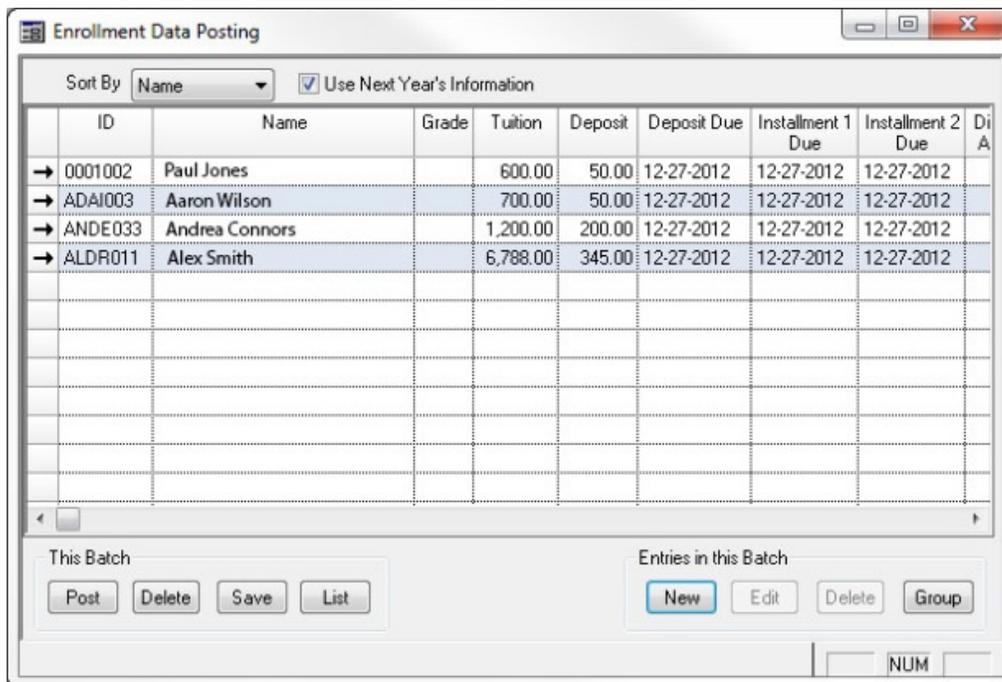


NOTE: You can now perform a Data Posting operation. For more information about Data Posting, see the *Enrollment Management System Reference Guide*.

- 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:

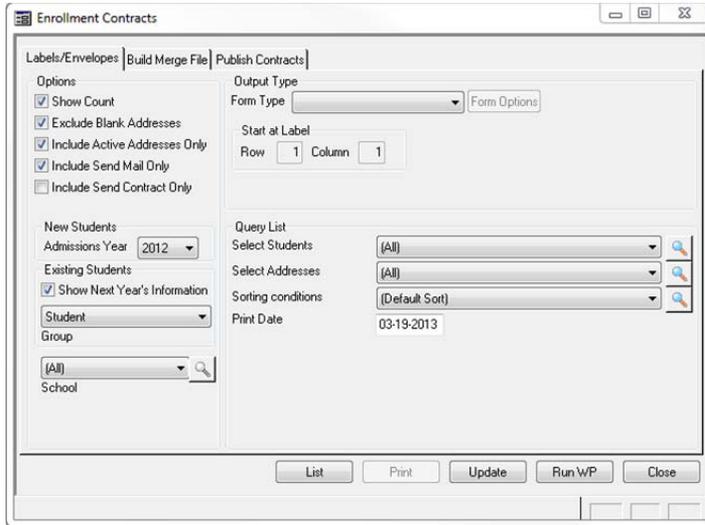
- Tuition amount
- Other amount
- Deposit amount or % of (Tuition - Financial Aid – Loans
- Deposit Due date
- Install 1 Due date
- Install 2 Due date



ID	Name	Grade	Tuition	Deposit	Deposit Due	Installment 1 Due	Installment 2 Due	Di A
→ 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	

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.

- 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*.

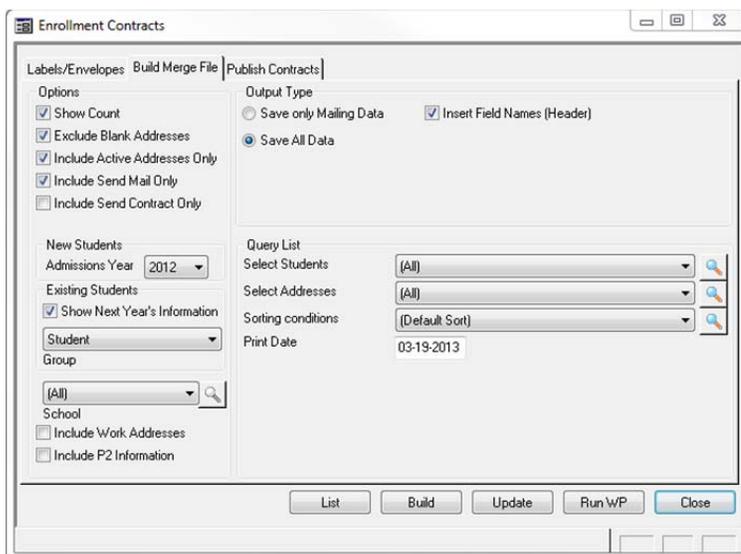


The screenshot shows the 'Labels/Envelopes' tab of the 'Enrollment Contracts' application. The interface includes several sections:

- Options:** A list of checkboxes including 'Show Count', 'Exclude Blank Addresses', 'Include Active Addresses Only', 'Include Send Mail Only', and 'Include Send Contract Only'.
- Output Type:** A dropdown menu for 'Form Type' and a 'Form Options' button.
- Start at Label:** Input fields for 'Row' (set to 1) and 'Column' (set to 1).
- Query List:** A section with dropdown menus for 'Select Students' (set to [All]), 'Select Addresses' (set to [All]), and 'Sorting conditions' (set to [Default Sort]). A 'Print Date' field is set to 03-19-2013.
- New Students:** A dropdown for 'Admissions Year' (set to 2012).
- Existing Students:** A checkbox for 'Show Next Year's Information' and dropdowns for 'Student' and 'Group' (both set to [All]).
- School:** A dropdown menu set to [All].

At the bottom of the window are buttons for 'List', 'Print', 'Update', 'Run WP', and 'Close'.

- 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 Contract Only** options. For more information about the fields in the **Build Merge File** tab, see the *Enrollment Management System Reference Guide*.



The screenshot shows the 'Build Merge File' tab of the 'Enrollment Contracts' application. The interface includes several sections:

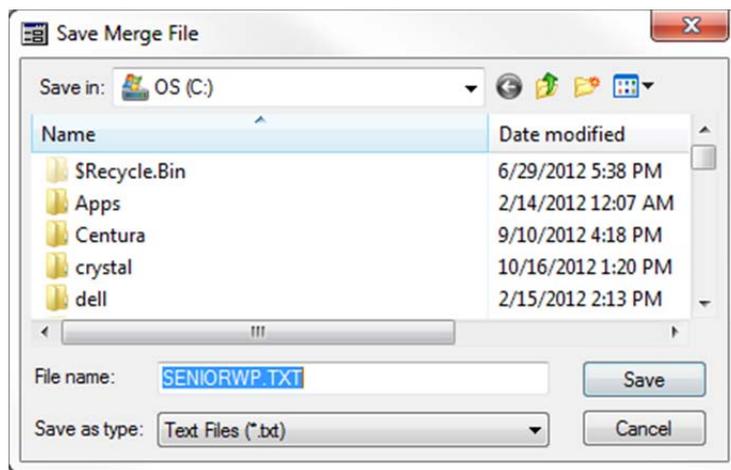
- Options:** A list of checkboxes including 'Show Count', 'Exclude Blank Addresses', 'Include Active Addresses Only', 'Include Send Mail Only', and 'Include Send Contract Only'.
- Output Type:** Radio buttons for 'Save only Mailing Data' and 'Save All Data' (selected), and a checkbox for 'Insert Field Names (Header)'.
- Query List:** A section with dropdown menus for 'Select Students' (set to [All]), 'Select Addresses' (set to [All]), and 'Sorting conditions' (set to [Default Sort]). A 'Print Date' field is set to 03-19-2013.
- New Students:** A dropdown for 'Admissions Year' (set to 2012).
- Existing Students:** A checkbox for 'Show Next Year's Information' and dropdowns for 'Student' and 'Group' (both set to [All]).
- School:** A dropdown menu set to [All].
- Additional Options:** Checkboxes for 'Include Work Addresses' and 'Include P2 Information'.

At the bottom of the window are buttons for 'List', 'Build', 'Update', 'Run WP', and 'Close'.

- 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.



- 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.

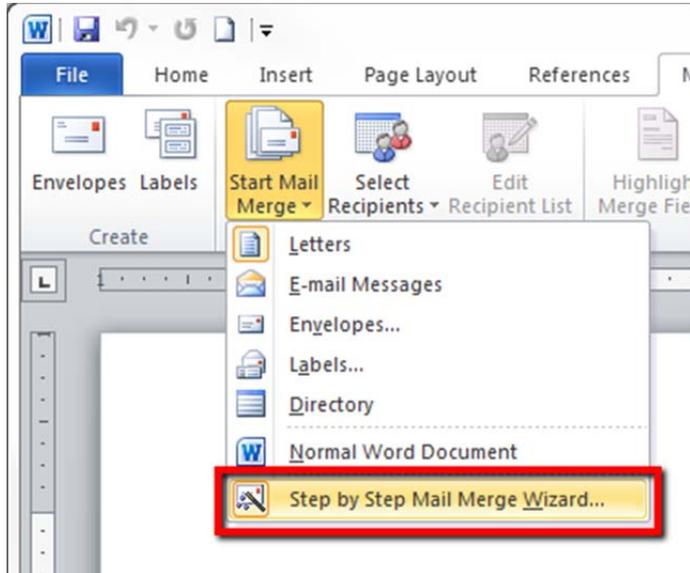


- Click **Save** on the Save Merge File screen.
- Open your Word Processing program to build the merge data file.

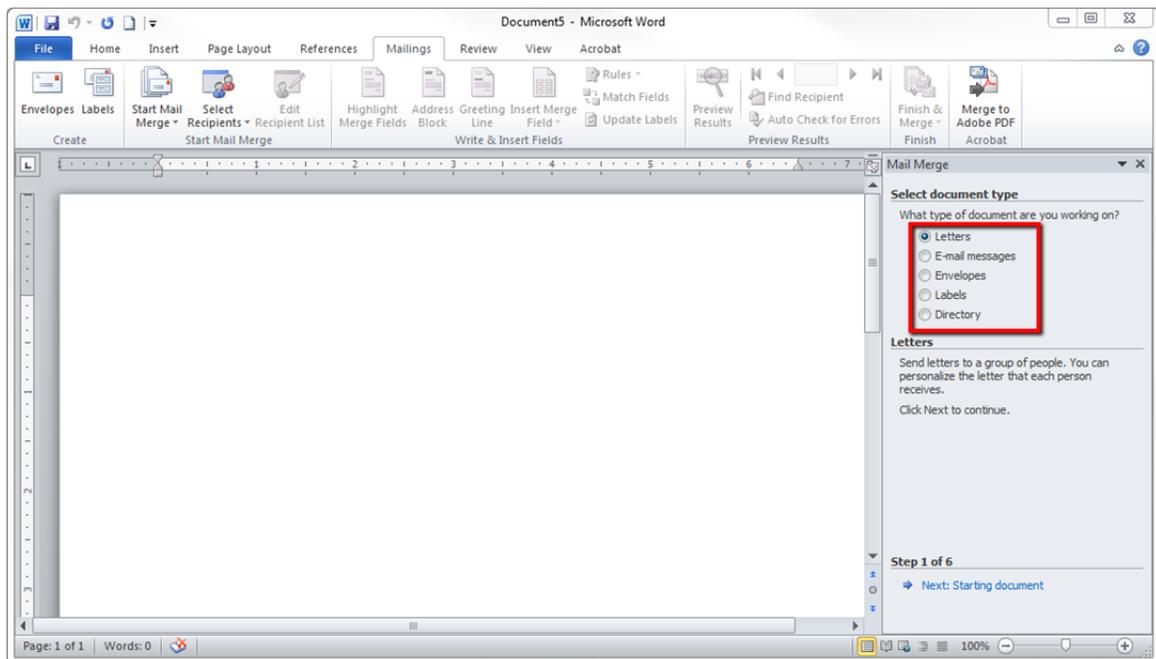
NOTE: These instructions are only valid for Microsoft Word 2010.

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

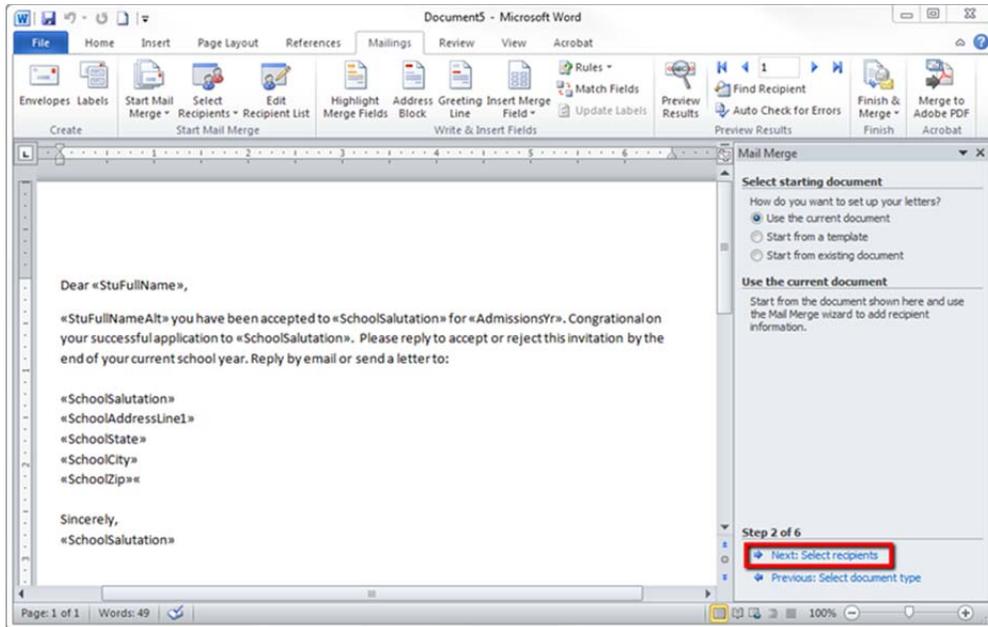
13. To perform the mail merge process in Word 2010, click the **Mailings** menu > **Start Mail Merge** > **Step-by-Step Mail Merge Wizard...**



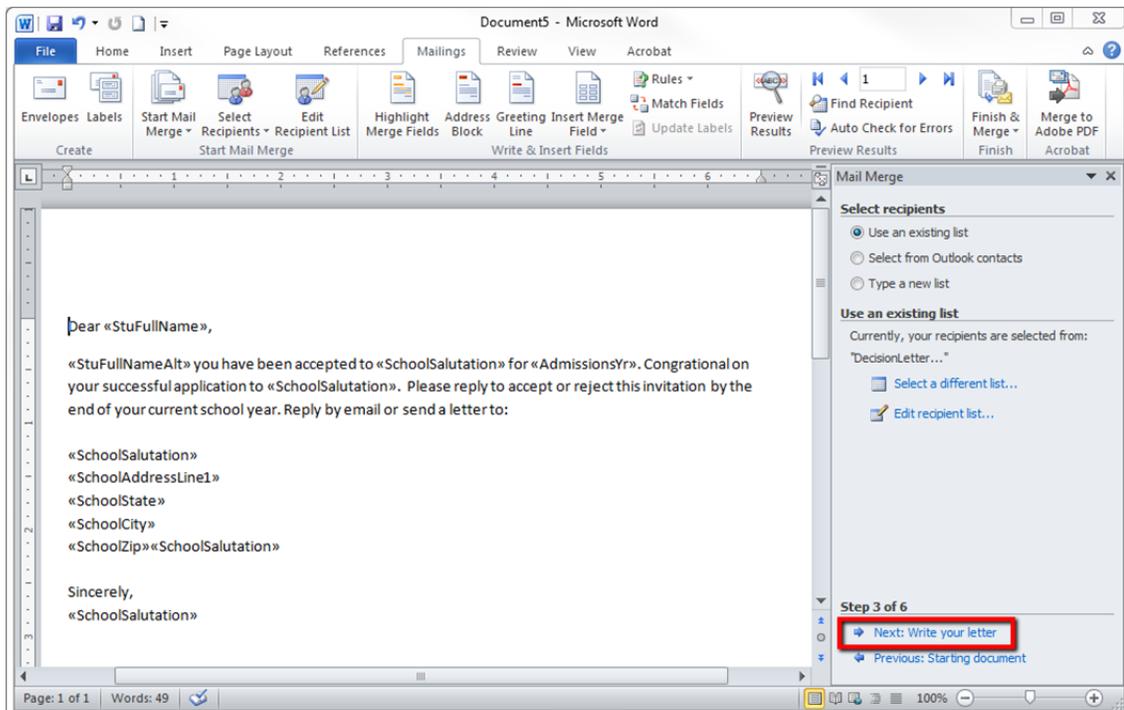
14. The Mail Merge menu bar appears on the right side of the screen. Select the **Letters** radio button, or the appropriate button that corresponds to your mail merge.



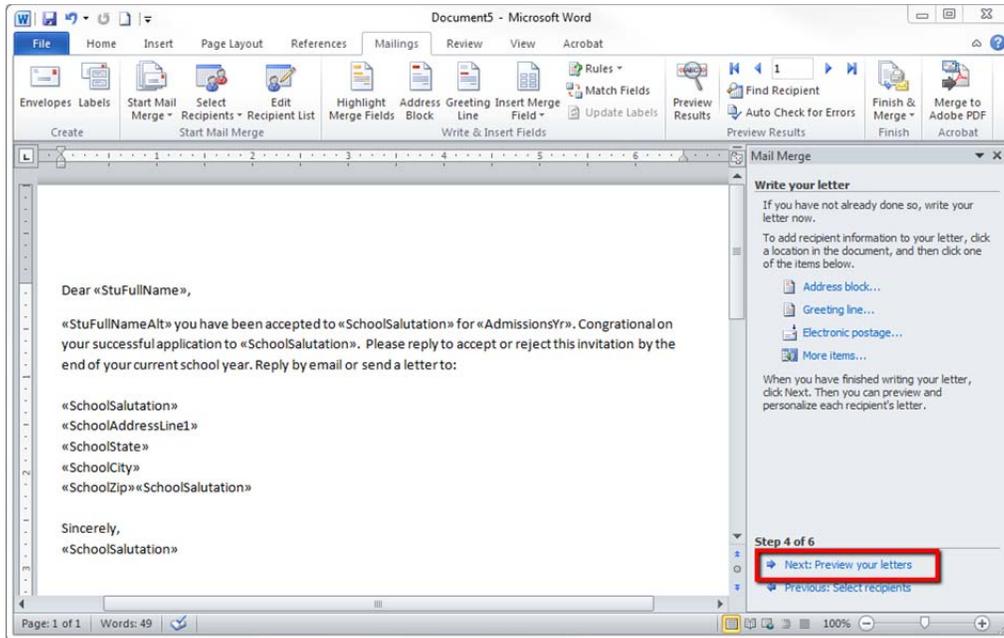
15. Once you have selected the document, click **Next: Select Recipients**.



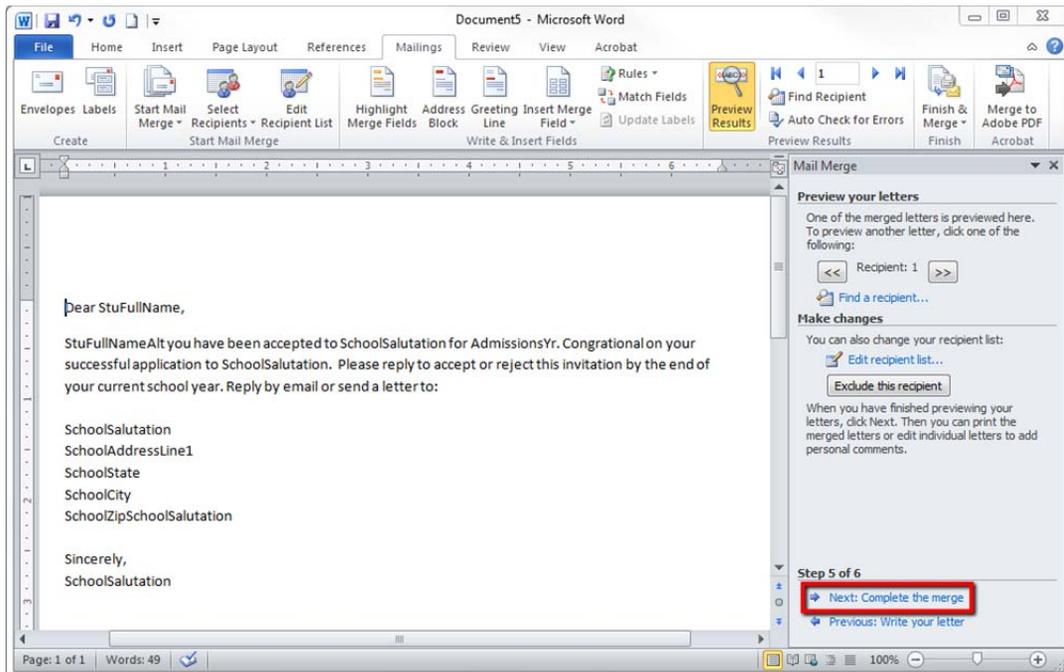
16. Select your recipients and click **Next: Write your letter**, or select an existing contract.



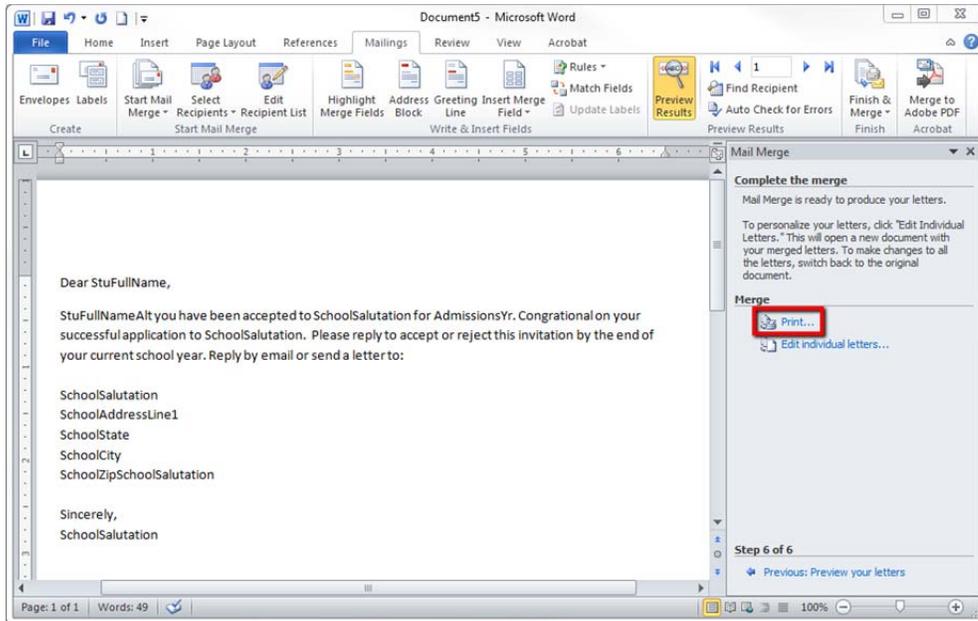
17. Write your contract if you have not already done so and click **Next: Preview your letters**.



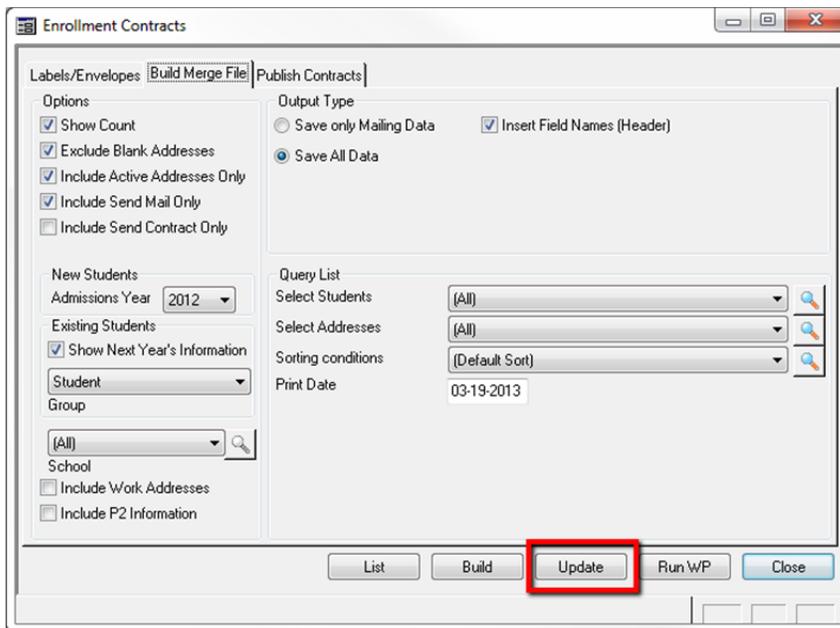
18. Set your recipients and click **Next: Complete the merge**.



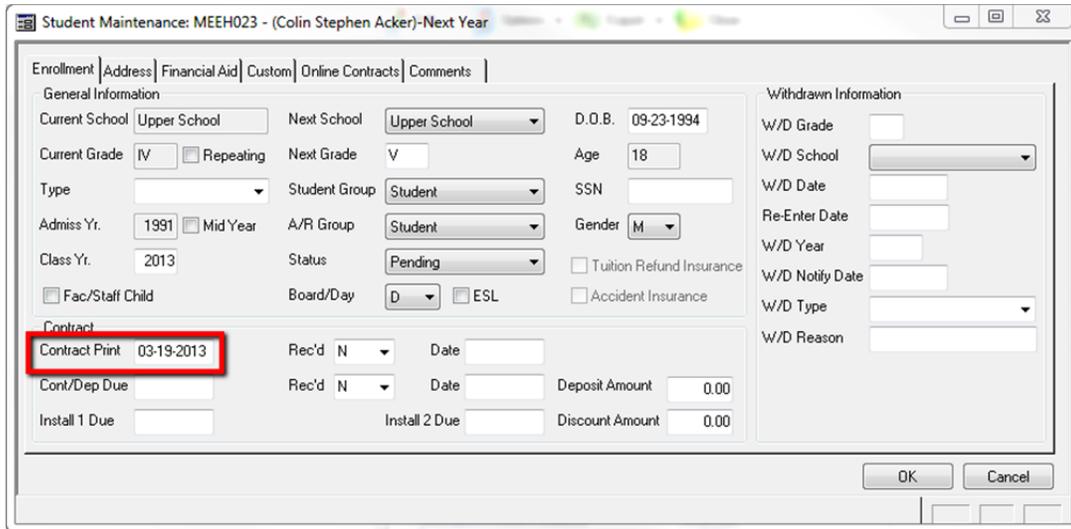
19. Click **Print...**



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.



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



Student Maintenance: MEEH023 - (Colin Stephen Acker)-Next Year

Enrollment | Address | Financial Aid | Custom | Online Contracts | Comments

General Information

Current School: Upper School | Next School: Upper School | D.O.B.: 09-23-1994

Current Grade: IV | Repeating: | Next Grade: V | Age: 18

Type: | Student Group: Student | SSN:

Admiss Yr.: 1991 | Mid Year: | A/R Group: Student | Gender: M

Class Yr.: 2013 | Status: Pending | Tuition Refund Insurance

Fac/Staff Child | Board/Day: D | ESL | Accident Insurance

Contract

Contract Print: 03-19-2013 | Rec'd: N | Date:

Cont/Dep Due: | Rec'd: N | Date: | Deposit Amount: 0.00

Install 1 Due: | Install 2 Due: | Discount Amount: 0.00

Withdrawn Information

W/D Grade: | W/D School:

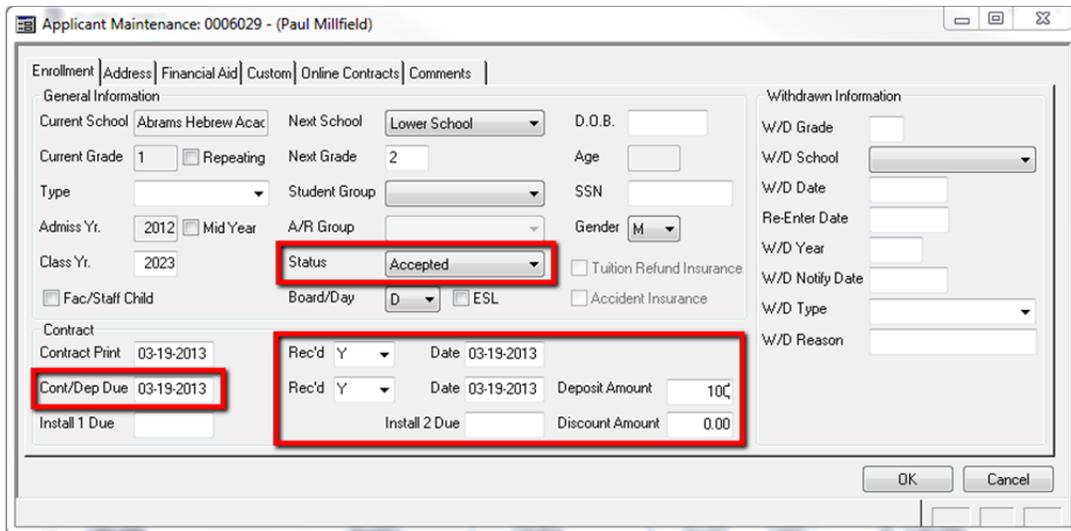
W/D Date: | Re-Enter Date:

W/D Year: | W/D Notify Date:

W/D Type: | W/D Reason:

OK | Cancel

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.



Applicant Maintenance: 0006029 - (Paul Millfield)

Enrollment | Address | Financial Aid | Custom | Online Contracts | Comments

General Information

Current School: Abrams Hebrew Acad | Next School: Lower School | D.O.B.:

Current Grade: 1 | Repeating: | Next Grade: 2 | Age:

Type: | Student Group: | SSN:

Admiss Yr.: 2012 | Mid Year: | A/R Group: | Gender: M

Class Yr.: 2023 | Status: **Accepted** | Tuition Refund Insurance

Fac/Staff Child | Board/Day: D | ESL | Accident Insurance

Contract

Contract Print: 03-19-2013 | **Cont/Dep Due: 03-19-2013** | Rec'd: Y | Date: 03-19-2013 | Deposit Amount: 100

Install 1 Due: | Install 2 Due: | Discount Amount: 0.00

Withdrawn Information

W/D Grade: | W/D School:

W/D Date: | Re-Enter Date:

W/D Year: | W/D Notify Date:

W/D Type: | W/D Reason:

OK | Cancel