

## Quick Reference: Transfer New Students to Development

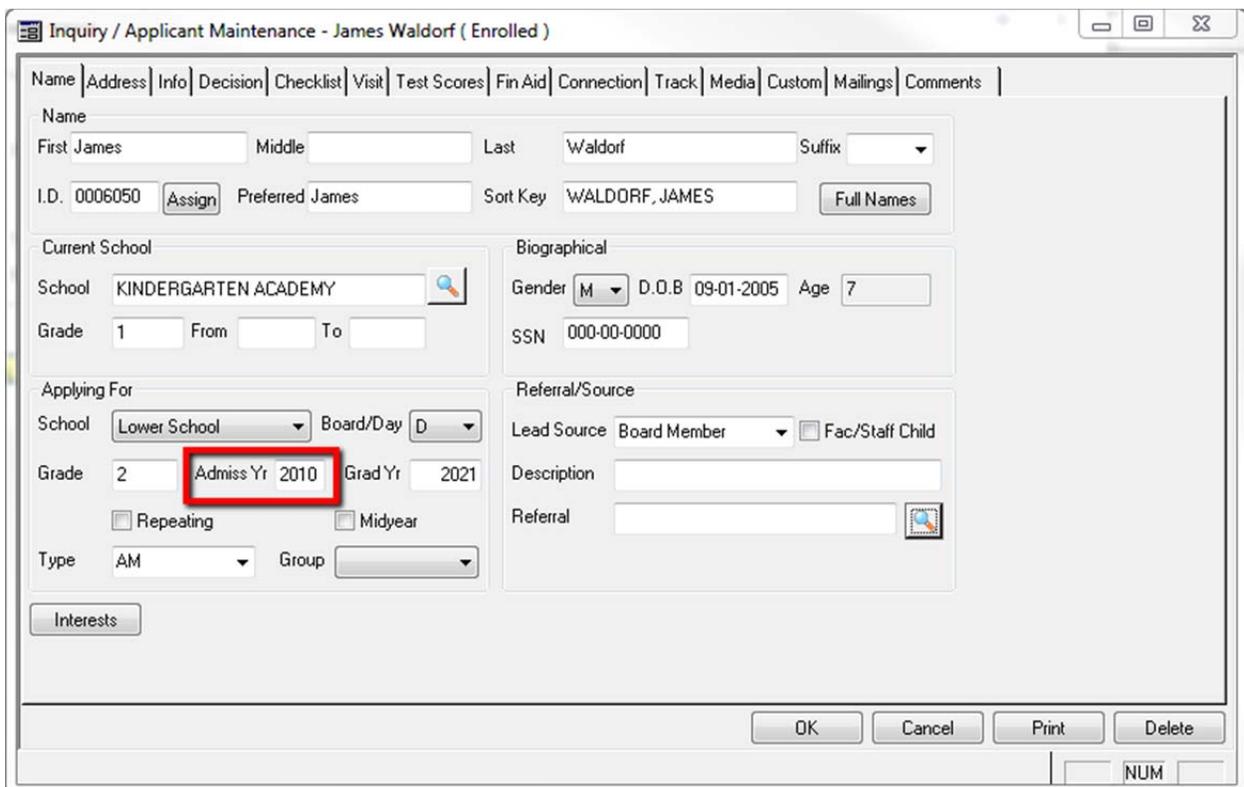
As you admit and enroll new students into your school, you can transfer them and their parents over to become constituents in Alumni/Development. This can only be done after these applicant records have been transferred as students to either Registrar and/or Accounts Receivable.

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.

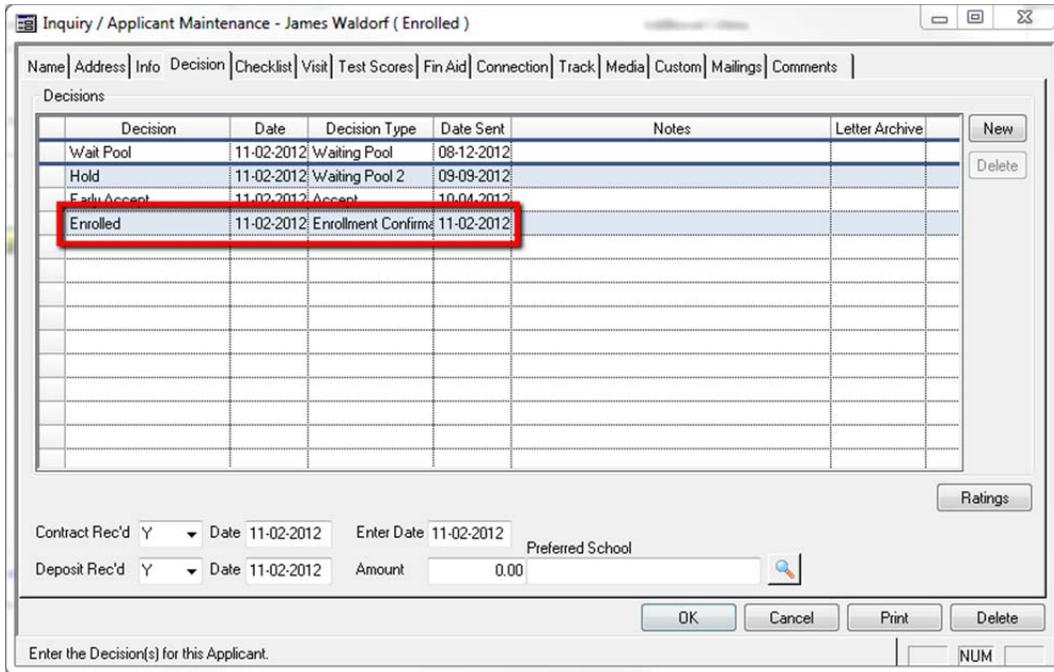


The screenshot shows a software window titled "Inquiry / Applicant Maintenance - James Waldorf ( Enrolled )". The window contains a form with several sections:

- Name:** First James, Middle, Last Waldorf, Suffix.
- I.D.:** 0006050, Assign, Preferred James, Sort Key WALDORF, JAMES, Full Names.
- Current School:** School KINDERGARTEN ACADEMY, Grade 1, From, To.
- Biographical:** Gender M, D.O.B 09-01-2005, Age 7, SSN 000-00-0000.
- Applying For:** School Lower School, Board/Day D, Grade 2, Admiss Yr 2010 (highlighted with a red box), Grad Yr 2021, Repeating, Midyear, Type AM, Group.
- Referral/Source:** Lead Source Board Member, Fac/Staff Child, Description, Referral.

At the bottom of the window are buttons for OK, Cancel, Print, and Delete, along with a NUM field.

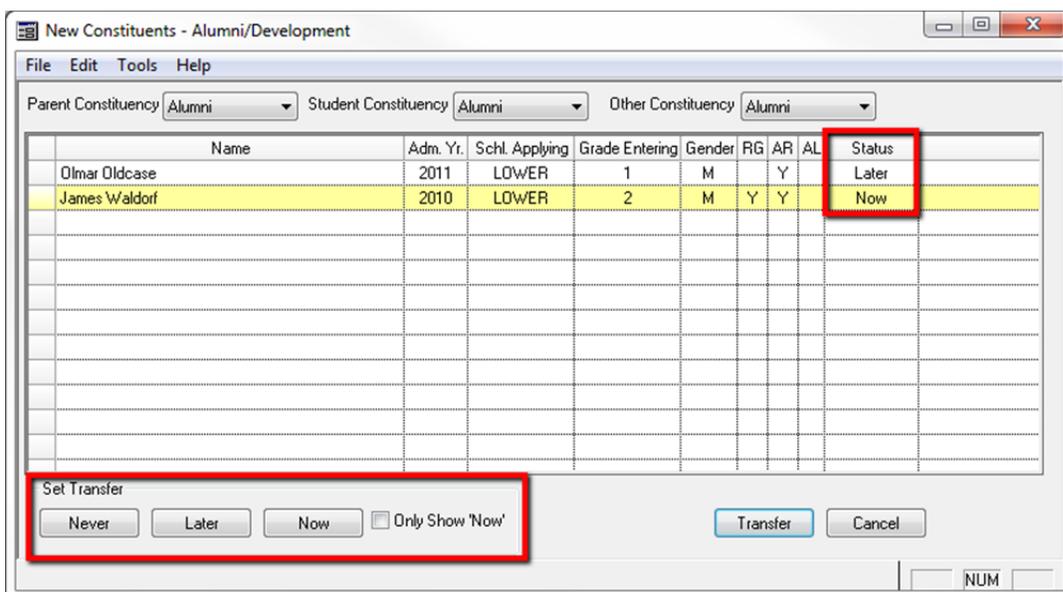
2. Go to the **Decision** tab and make sure the current decision is set to 'Enrolled'.



Decision	Date	Decision Type	Date Sent	Notes	Letter Archive
Wait Pool	11-02-2012	Waiting Pool	08-12-2012		
Hold	11-02-2012	Waiting Pool 2	09-09-2012		
Early Accept	11-02-2012	Accept	10-01-2012		
Enrolled	11-02-2012	Enrollment Confirmed	11-02-2012		

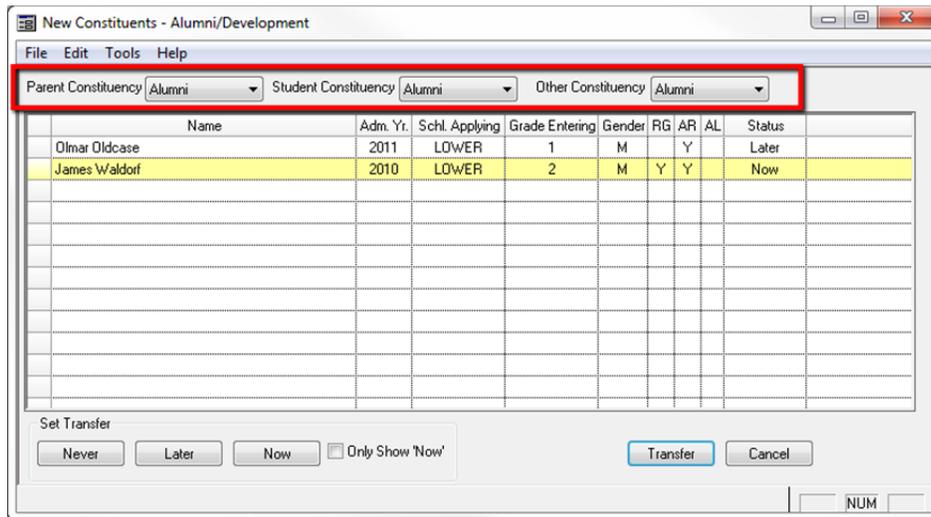
3. Open the Alumni/Development application, and click **Maintenance > New Families**.

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.



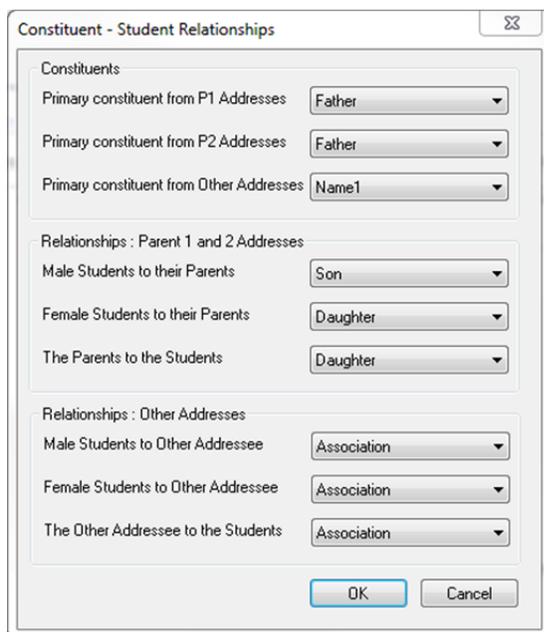
Name	Adm. Yr.	Schl. Applying	Grade Entering	Gender	RG	AR	AL	Status
Olmar Oldcase	2011	LOWER	1	M		Y		Later
James Waldorf	2010	LOWER	2	M	Y	Y		Now

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**.



Name	Adm. Yr.	Schl. Applying	Grade Entering	Gender	RG	AR	AL	Status
Olmar Oldcase	2011	LOWER	1	M		Y		Later
James Waldorf	2010	LOWER	2	M	Y	Y		Now

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.