

Quick Reference: Mid-Year Enrollment Process

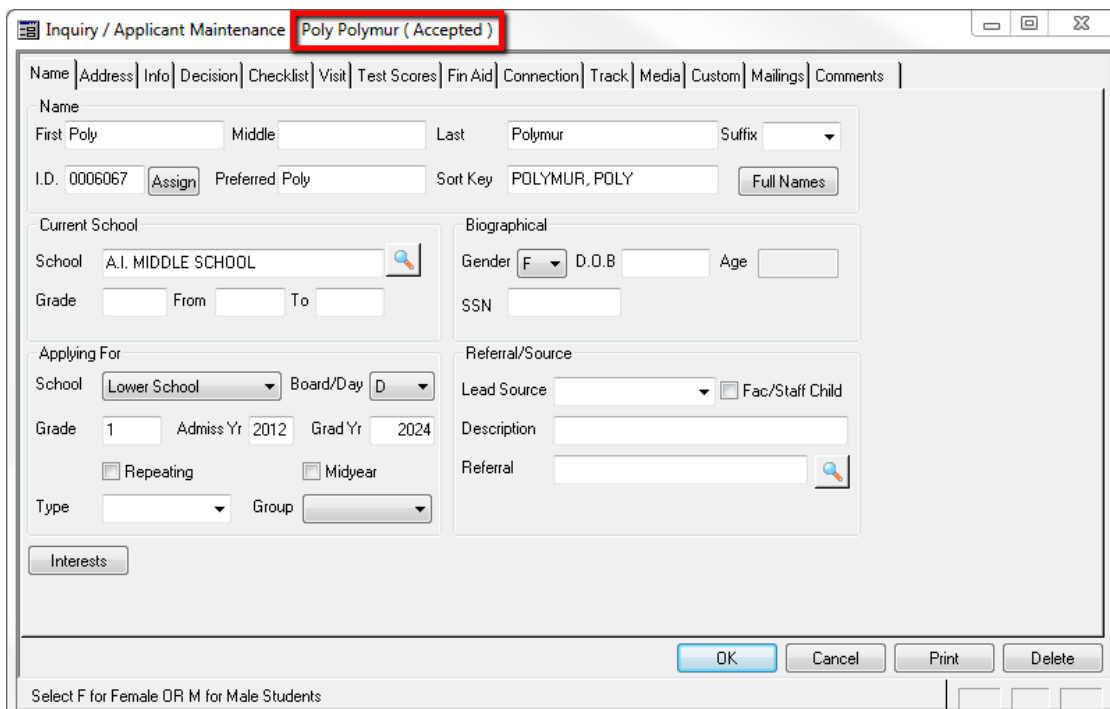
Review the necessary steps to enroll student(s) into your school after your school has stopped accepting contracts for Next Year student enrollment. The recommended procedure to enroll students after the Next Year student enrollment session has ended is to physically print an Enrollment contract within the Enrollment Management application.

Note: If your school uses Online Enrollment to publish contracts and you have already begun your Enrollment process for the upcoming school year, you will need to create a paper contract for students who are enrolling Mid-Year.

If the student(s) that need to be enrolled into your school are not currently in the Advantage system, you will need to add the student(s) as new Inquiry/Applicants in the Admissions application and then set the Current Decision to **Accepted** in the Decision tab. This automatically makes the student(s) available in the Enrollment Management application. When the student(s) become available in the Enrollment Management Application, you can then print the Enrollment contact.

To perform the Mid-Year Enrollment procedure:

1. Open a student Applicant record in the Admissions application. The Student Applicant record should have **(Accepted)** appearing after the student's name.

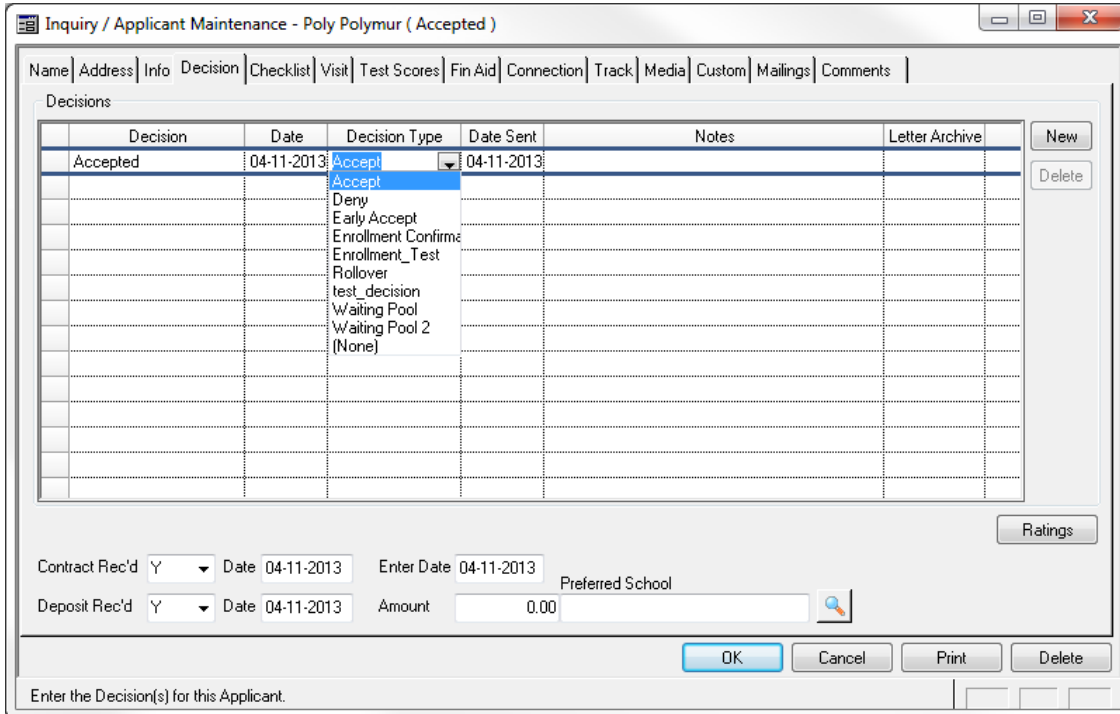


The screenshot shows the "Inquiry / Applicant Maintenance" window with the title bar "Poly Polymur (Accepted)". The window contains several tabs: Name, Address, Info, Decision, Checklist, Visit, Test Scores, Fin Aid, Connection, Track, Media, Custom, Mailings, and Comments. The "Name" tab is active, showing the following fields:

- Name: First Poly, Middle, Last Polymur, Suffix
- I.D. 0006067, Assign, Preferred Poly, Sort Key POLYMUR, POLY, Full Names
- Current School: School A.I. MIDDLE SCHOOL, Grade From To
- Biographical: Gender F, D.O.B, Age, SSN
- Applying For: School Lower School, Board/Day D, Grade 1, Admiss Yr 2012, Grad Yr 2024, Repeating, Midyear, Type, Group
- Referral/Source: Lead Source, Fac/Staff Child, Description, Referral
- Interests

At the bottom of the window, there are buttons for OK, Cancel, Print, and Delete. A footer note states: "Select F for Female OR M for Male Students".

The **(Accepted)** indicator in the title of this screen only appears if **Accepted** is selected from the **Decision Type** column in the **Decision** tab.



Inquiry / Applicant Maintenance - Poly Polymur (Accepted)

Name | Address | Info | Decision | Checklist | Visit | Test Scores | Fin Aid | Connection | Track | Media | Custom | Mailings | Comments

Decisions

Decision	Date	Decision Type	Date Sent	Notes	Letter Archive
Accepted	04-11-2013	Accept	04-11-2013		

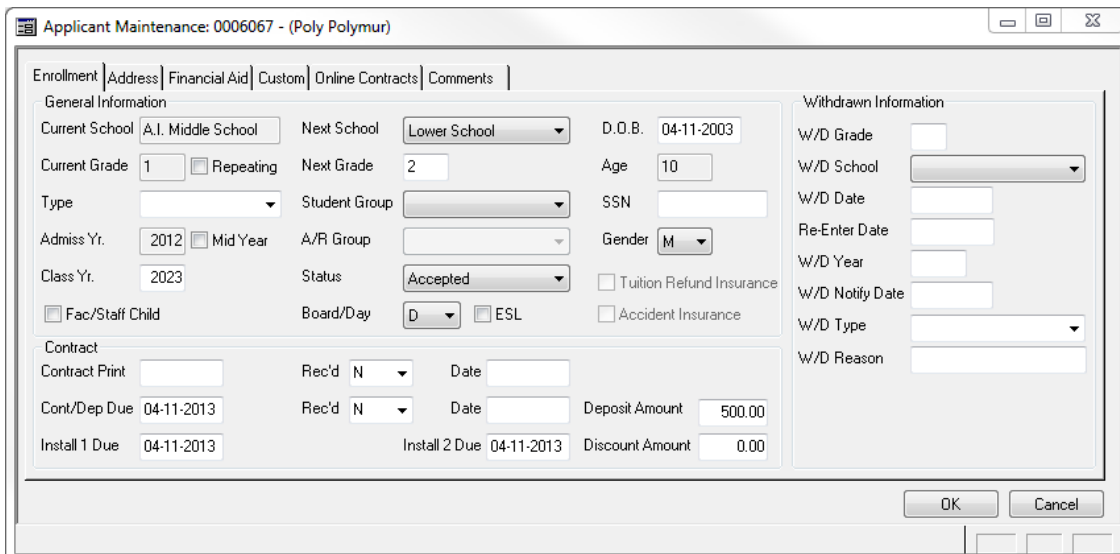
Contract Rec'd: Y Date: 04-11-2013 Enter Date: 04-11-2013 Preferred School:

Deposit Rec'd: Y Date: 04-11-2013 Amount: 0.00

OK Cancel Print Delete

Enter the Decision(s) for this Applicant.

2. Open the Enrollment Management application and click **Maintenance > Students** and search for the student(s) by entering the proper search criteria. Once you have confirmed that the student is available in the Enrollment Management application, enter the necessary Enrollment data. The Enrollment data should include the Enrollment Deposit, Due Dates, Tuition, and Discount Amounts.



Applicant Maintenance: 0006067 - (Poly Polymur)

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

General Information

Current School: A.I. Middle School Next School: Lower School D.O.B.: 04-11-2003

Current Grade: 1 Repeating: ☐ Next Grade: 2 Age: 10

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: Rec'd: N Date: Deposit Amount: 500.00

Cont/Dep Due: 04-11-2013 Rec'd: N Date: Discount Amount: 0.00

Install 1 Due: 04-11-2013 Install 2 Due: 04-11-2013

Withdrawn Information

W/D Grade: W/D School:

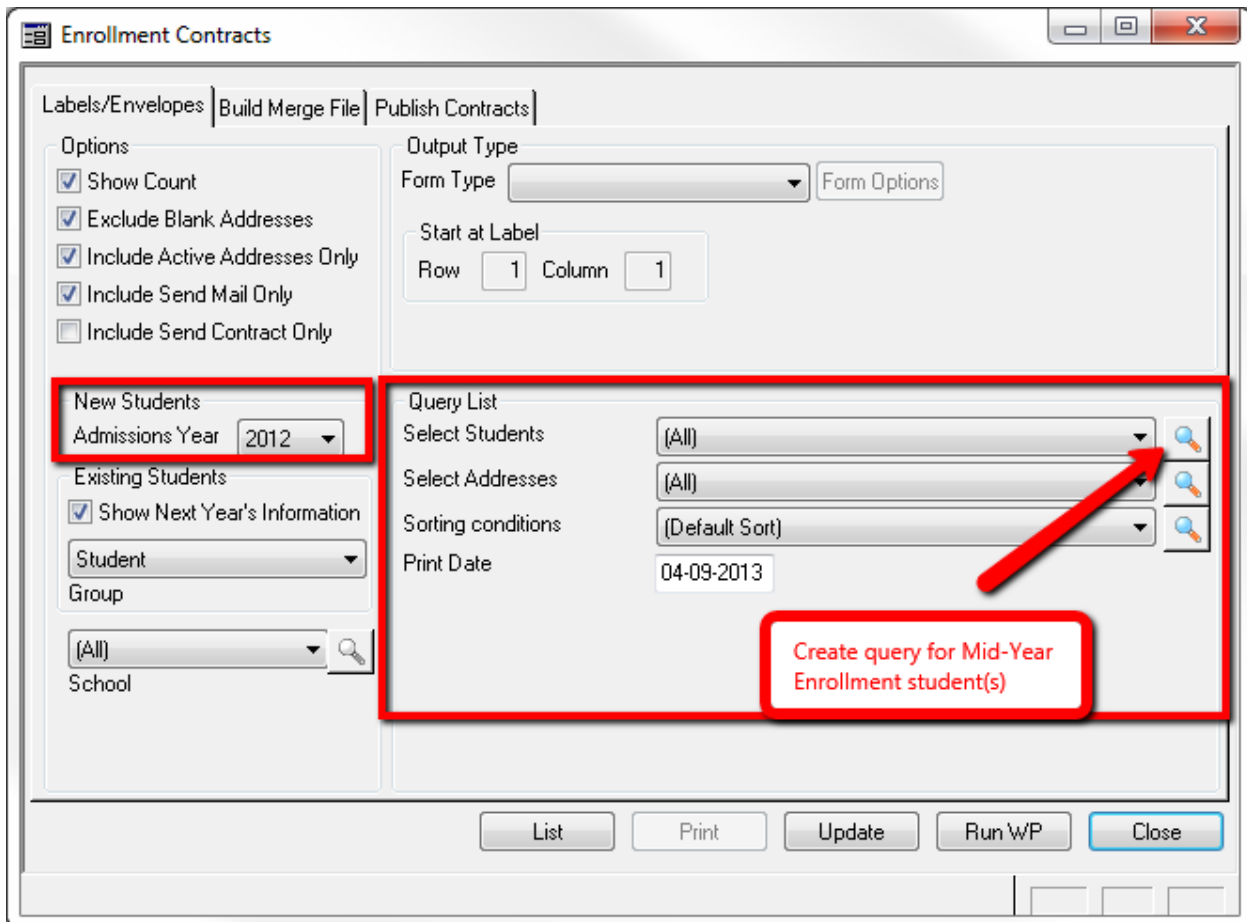
W/D Date: Re-Enter Date:

W/D Year: W/D Notify Date:

W/D Type: W/D Reason:

OK Cancel

3. In the Enrollment Management application, click **Enrollment Contracts > By Student** or **By Family**. 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*. Ensure that you enter the correct year in the **Admissions Year** field for the Mid-Year student enrollment and create a new query in the Query List area that will enable you to select the student(s) who need to be enrolled Mid-Year.



Enrollment Contracts

Labels/Envelopes | Build Merge File | Publish Contracts

Options

- ☒ Show Count
- ☒ Exclude Blank Addresses
- ☒ Include Active Addresses Only
- ☒ Include Send Mail Only
- ☐ Include Send Contract Only

Output Type

Form Type: Form Options:

Start at Label

Row: Column:

New Students

Admissions Year:

Existing Students

- ☒ Show Next Year's Information

Student:

Group:

School:

Query List

Select Students:

Select Addresses:

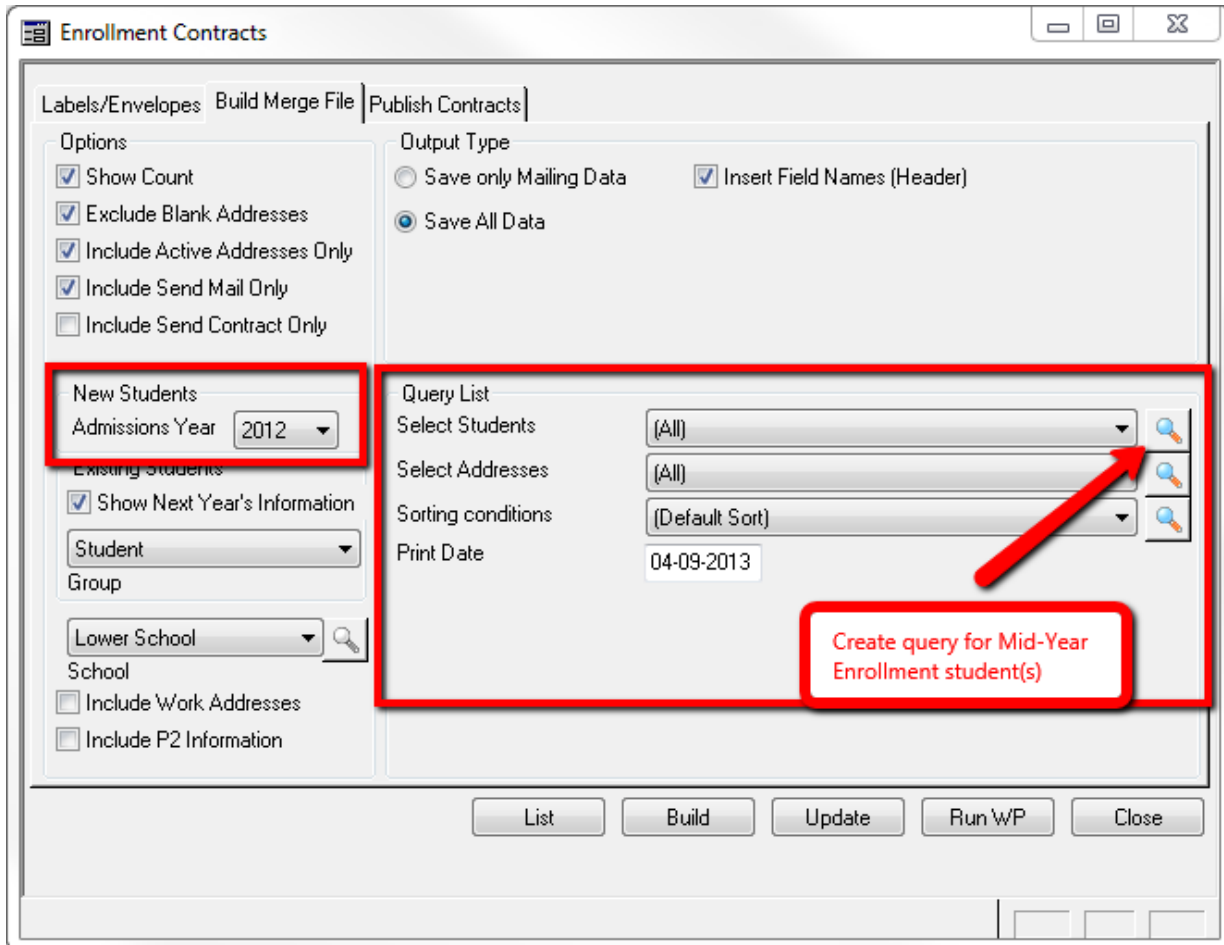
Sorting conditions:

Print Date:

Create query for Mid-Year Enrollment student(s)

List Print Update Run WP Close

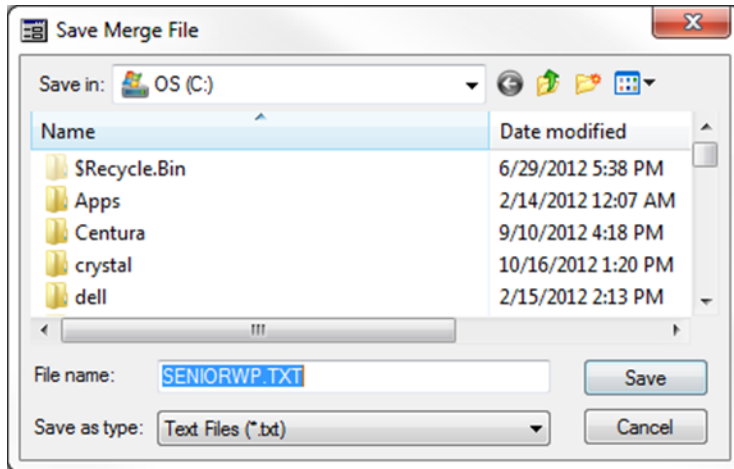
4. When you have entered all of the necessary information on the **Labels/Envelopes** tab, click the **Build Merge File** tab to produce a text file (*.txt) to use with your word processing program's mail merge function. You can include more than just mailing information in the merge document by selecting 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*. Ensure that you enter the correct year in the **Admissions Year** field for the Mid-Year student enrollment.



The screenshot shows the 'Enrollment Contracts' window with the 'Build Merge File' tab selected. The 'Options' section on the left includes checkboxes for 'Show Count', 'Exclude Blank Addresses', 'Include Active Addresses Only', 'Include Send Mail Only', and 'Include Send Contract Only'. The 'Output Type' section on the right has radio buttons for 'Save only Mailing Data' and 'Save All Data', and a checkbox for 'Insert Field Names (Header)'. The 'New Students' section includes a dropdown for 'Admissions Year' set to '2012'. The 'Existing Students' section includes a checkbox for 'Show Next Year's Information' and a dropdown for 'Student'. The 'Query List' section includes dropdowns for 'Select Students' and 'Select Addresses', a dropdown for 'Sorting conditions', and a text field for 'Print Date' set to '04-09-2013'. A red box highlights the 'Admissions Year' field. Another red box highlights the 'Query List' section, and a red arrow points to the 'Create query for Mid-Year Enrollment student(s)' button.

5. 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.

6. 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.



7. Click **Save** on the Save Merge File screen.

8. Open your word processing program and build the merge data file.