

Radius

Approving Contracts

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Approving Contracts

Home Screen: Enrollment Center notifications

- A red badge will appear next to the submenu item **Approvals** when a contract has been submitted. The number indicates the number of items waiting to be approved.
 - Select Approvals

Enrollment/Re-Enrollment Search Screen

- Turn Editing mode to ON
- Select the Contracts link (left menu) to open list of Contracts awaiting approval

| | Home /En |
|-------------------|-----------------|
| Enrollment / Re-E | nrollment |
| | << Hide |
| Checklists 1 | |
| Contracts 2 | |

• Use the Source (on right) to refine the type of Contracts you will be working with, Enrollment or Re-Enrollment specifically, if you would like.

| EDITING (1997) Home/En | rollment and Re Enrollm | ent Approvals | | | | | | | | | | | | |
|----------------------------|-------------------------|---------------|-----------|-----------|--------|------------|--------|-----------|------|---------|------------------|--------------------|-------------|---|
| Enrollment / Re-Enrollment | : | | | | | | | | | | | | | |
| << Hide Checklists | Contracts | | | | | | | | | | | Source Enrolment/F | e-Enrolment | ~ |
| Contracts 🕕 | First Name: | Year: | | Grade: | | | | | | | - | | | |
| | Exc John | All | ~ | AI 👻 | Filter | Clear | | | | Source: | Enrollment / Re- | Enrollment | ~ | |
| | Last Name: | Division: | | | | | | | | | | | | |
| | Esc Smith | All | ¥ | | | | | | | | Enrollment / Re- | -Enrollment | | |
| | • | | | | | | | | | | Enrollment | | | |
| | FintNa | me | | Last Name | | | Source | | Year | | | | | |
| | Daniel | | Davis Jr. | | | Enroliment | | 2016-2013 | 7 | | Re-Enrollment | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

| cklists First Name: Year: tracts First Name: Year: Exclohn All Last Name: Division: Exc Smith All s a new tab in your Approval Actions ser. Besure you are not Approve Resubmit Approve | << Hide | Contracts | |
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| Ex John All Last Name: Division: Ex: Smith All s you to view the contractyw Contract Approval Actions s a new tab in your ser. Be sure you are not Approve Resubmit ing pop-up windowsl | tracts 🔕 | First Name: | Year: |
| Last Name: Division: Ex: Smith All s a new tab in your ser. Be sure you are not Approvel Actions reser. Be sure you are not Approve Resubmit king pop-up windows! | | Ex: John | All |
| Ex: Smith All | | Last Name: | Division: |
| vs you to view the contract of the contract Approval Actions is a new tab in your ser. Be sure you are not a Approve Resubmit king pop-up windows! | | Ex: Smith | All |
| vs you to view the contract year of the contract Approval Actions is a new tab in your ser. Be sure you are not Approve Resubnit king pop-up windowst | | * • | |
| Is a new tab in your rser. Be sure you are not Q Approve Resubmit king pop-up windows! | | | Approval Actions |
| ting pop-up windows! | rs you to view the con | tract, w Contract | Approval Actions |
| | s you to view the con s a new tab in your ser. Be sure you are n | tractew Contract | Approval Actions |

- You will see a list of Students.
- You can view a specific child's contract be clicking on the magnifying class under View Contract. NOTE: Contract will open in a new tab in your browser. Enable pop-up windows, to see the contract.
- Under Approval Actions, you can **Approve** the contract or ask the parent to **Resubmit**. The Resubmit button can be used if a signature is illegible or missing.



• If you choose **Resubmit**, a new window, "Clear Signature(s)", will appear. This screen will clear the signature of the contract signatory selected, then you will be prompted to send signatories an email that states they need to login and resign the contract and resubmit.

| lease choose which contrac | t signatory you would like to Resul | omit the contract by checking the box next to their n |
|-------------------------------|-------------------------------------|---|
| nu clicking the clear signati | Name | Signed |
| Cindy Trobaugh | | Yes |
| | | |
| | | |
| | | |

• Choose **Approve**, an "Approval" window will open for your review

Contract mapping and field choices vary from school to school

| | | ¥ 1 | No. | | | |
|----------|--|--|---------------------------------------|------------------------------|-------------------------|--|
| 2 | Cynthia Templeton Q View Enrollment Record 10/12/2000 (Age 19) Female | Yes Y Deposit Paid Signature | es Yes Complete Checklist Complete | | | |
| 🕞 Bac | k to approvals grid | | | | | |
| Gen | eral Information | | | | | |
| Co | ntract Name: enrollment_ASP | | - | Received Date: 04/17/2020 09 | 9:08 AM Q View Contract | |
| Div | vision Applying: | Applying for Financial Aid: | Repeating: | Board/Day: | Decision*: | |
| Mi | ddle School | Yes | No | Day | ✓ | |
| Yea | ar Applying: | Mid Year: | Faculty/Staff Child: | Applicant Origin: | Grade Type: | |
| 20 | 19-2020 | No | No | Domestic | · · · | All schools may not use this field, if you do this needs to |
| Gra 6 | ade Applying: | | | | | contract approval process to update AR. |
| | aformation | | | | | |
| AVRI | normation | | | | | |
| Acco | unt Type: | All schools may not use field, if you do this needs | to | Tuition Refund Insurance | | |
| | ~ | be set manually during | o to | | | |
| Tuiti | on Plan: | update AR. | 810 | Accident Insurance | | |
| | ~ | | | | | |

• General Information

- View Contract: to open contract
 - NOTE: Viewing the contract from this window is much faster than viewing from the approvals grid.
- Decision type: (i.e. enrolled or re-enrolled)
- Grade Type: (i.e. number of after-school days, full/half day, etc.)

• A/R Information

- Set the Account Type as needed
- Set Tuition Plan as needed
- Tuition Refund Insurance and Accident Insurance will be selected based on choices made on contract.

Additional Fields

- Contract selections may be listed in the Additional Fields table
- Example: A contract offers choices on after-school and TRI. Based on values set to true we know that the family has selected:
 - 3 days of after-school care on Tuesday, Wednesdays, Thursday
 - Tuition Refund Insurance

| Additional Fields | | | | | |
|-------------------|-------|--|--|--|--|
| Label | Value | | | | |
| 3Day-Thurs | true | | | | |
| 3Day-Tues | true | | | | |
| 3Day-Wed | true | | | | |
| TRI | true | | | | |
| | | | | | |

Example: Contract ready for Approval

| | e / Enrollment and Re-Enroll | ment Approvals | | | | |
|-----------------------------|---------------------------------------|-----------------------------|------------------------|-------------------|------------------------|---------------|
| General Information | | | | | | * |
| Contract Name: enrollm | ent_ASP | | Received Date: 04 | /17/2020 09:08 AM | Q View Contract | |
| Division Applying: Lower | Applying for Financial Aid: Yes | Repeating: No | Board/Day: D | Decision*: | | |
| Year Applying: 2020-2021 | Mid Year: No | Faculty/Staff Child: Yes | Applicant Origin: | Grade Type: | | |
| Grade Applying: SMP | | | | | | |
| A/R Information | | | | | | |
| Account Type: | | | Tuition Refund Insurar | nce | | |
| Faculty | | | 4 | | | |
| Tuition Plan: | | | Accident Insurance | | | |
| MONTHLY | Y | | | | | |
| Custom Fields | | | Additio | onal Fields | | |
| Label 🔺 | | Value | | Label | Value | _ |
| | No data available. | | 3Day-T | hurs | true | |
| | | | 3Day-1 | ues Nod | true | |
| | | | TRI | veu | true | |
| Open Next Approval Recor | d | | | | | |
| | | | | | | |
| | | | | | ^ | pprove Cancel |

- Select Approve button when you have completed the review of contract data.
 - The "Decision" is required, as indicated be red asterisk

• You can move to the next record to review by selecting the checkbox at the bottom left of the screen without returning to the approvals grid or list of children requiring approval.

| Open Next Approval Record | | |
|---------------------------|-----------|------|
| | Аргана Са | ncel |

The **Parent Portal** will automatically update.

- The Enrolled box will appear
- Contract Status is "Approved"
- My Documents will show a notification badge

| SENIOR ACADEMY | ≡ . | | Rebecca C. Y |
|----------------------------|--|-------------------------|---------------|
| Dashboard 🖀 | | <u>¢</u> | ^ |
| Enrollment / Re-Enrollment | Hello Rebecca | Pay \$0.00 | 0 |
| Billing | and the second sec | Now Current Balance | Notifications |
| Important Links | | | |
| My Documents 2 | Katherine Clark | nrolled | \$ |
| | Lower School | | Million S |
| | Contract Status: Approved | | |
| • | | 001 05 001 011 0C1 1 0° | |
| | | | |
| | Yo Important Links | | |
| | Schoology | | |
| | Click here to get to the teacher pages on Schoology! | | |
| | Managebac | | |
| | Click here to get to the Managebac portal. | | |
| | Magnus Health | | |
| | Login to the Magnus Health Portal | | |
| | Parent/Teacher Conferences | | |
| | | | |

If there are multiple signatories, there will be multiple docs listed.

R :

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| Dashboard | * | # > My Documents | | | | |
|----------------------------|---|---|-----------------|-------|---------------|--|
| Enrollment / Re-Enrollment | | | | | | |
| | | Search Q Search | | | | |
| Important Links | | Document Name | Name | Group | Publish Date | |
| | | Re-Enrollment Contract | Katherine Clark | | 12/28/2018 | |
| My Documents 2 | | Re-Enrollment Contract | Katherine Clark | | 12/28/2018 | |
| | | Image: Height of the second | | | 1 - 2 of 2 it | |

Make sure pop up blocker is not on!