

RADIUS

Publish Contracts

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Publish Contracts (Re-Enrollment)

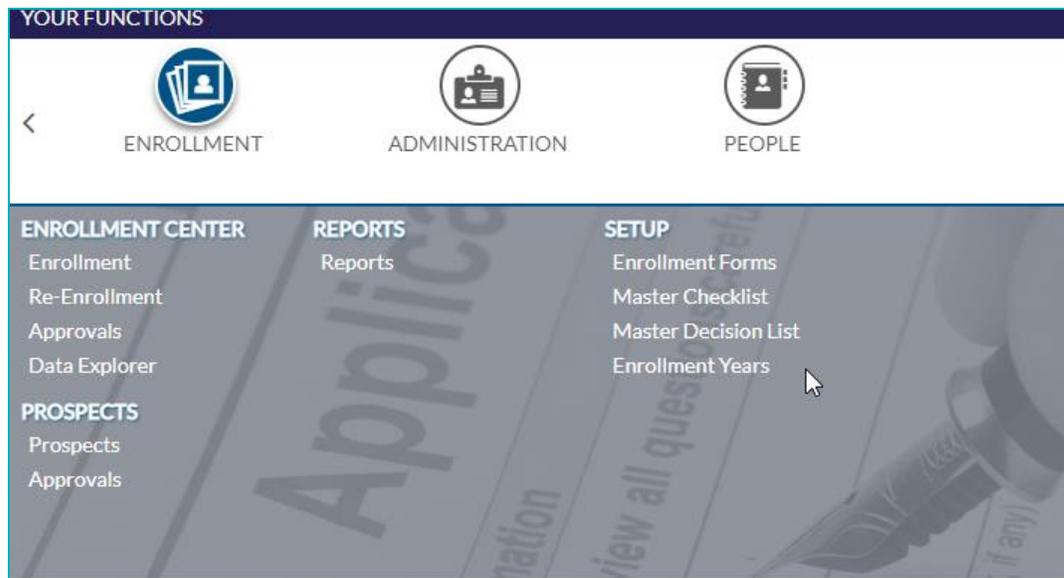
The Enrollment and Re-Enrollment process is the same. Re-Enrollment is demonstrated below.

Getting Ready for Enrollment:
Set up **Merchant Account** and payment details
Set up **Enrollment Years** details by division

Open Enrollment for Each Division

Function: Enrollment

- From the SETUP submenu, select Enrollment Years



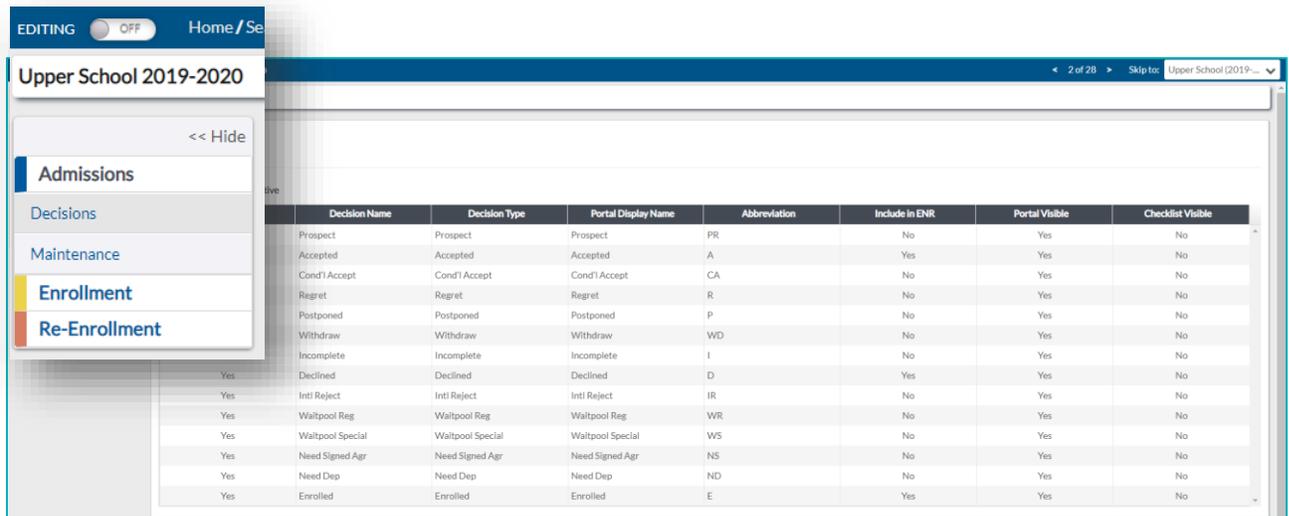
- The Search window will open listing each division. You may see multiple seasons. Set the dates for each division.
 - Select a division for upcoming season

The screenshot shows the 'Enrollment Year Setup' window. It has a search bar at the top and a table below. The table has columns for Division, Year, ENR Current Year, RE-ENR Current Year, ENR Open, RE-ENR Open, ENR Visible From, RE-ENR Visible From, ENR Visible To, and RE-ENR Visible To. The data is as follows:

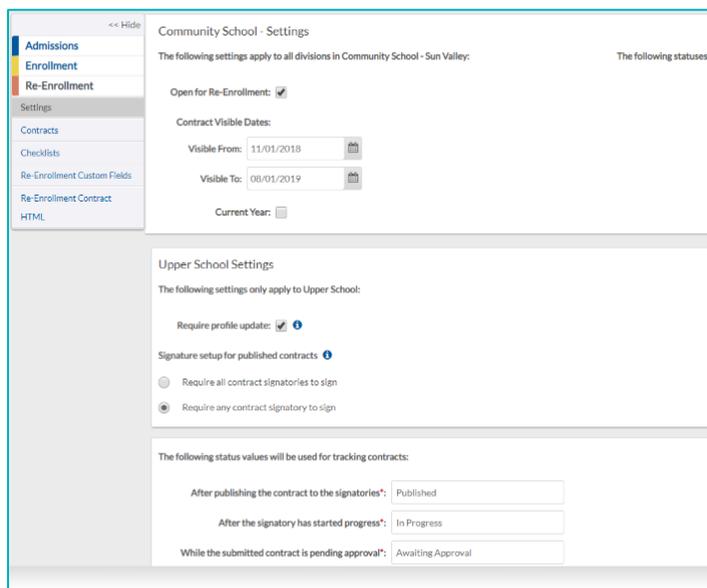
Division	Year	ENR Current Year	RE-ENR Current Year	ENR Open	RE-ENR Open	ENR Visible From	RE-ENR Visible From	ENR Visible To	RE-ENR Visible To
Early Childhood Center	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
Upper School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
Elementary School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
Middle School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
Early Childhood Center	2018-2019	Yes	No	Yes	No	12/13/2017		12/15/2017	

- The window defaults to top menu item, Admission Decisions

- Select Re-Enrollment



Click on the EDITING button to toggle edit mode on/off



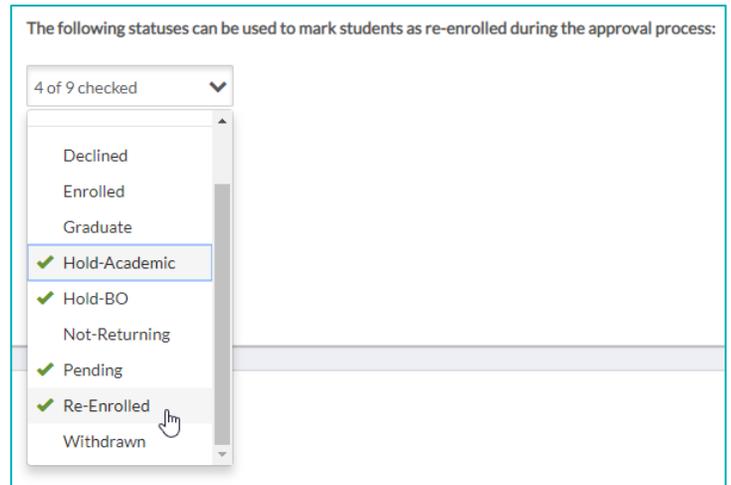
Re-Enrollment | Settings

- Check 'Open for Re-Enrollment' box
- Set Contract Visible Dates
- Select Current Year
- Select Student Enrollment Status
 - See details below
- Require Profile Update
- Determine Signatories
- Set the Contract status values
 - These will display graphically in widgets

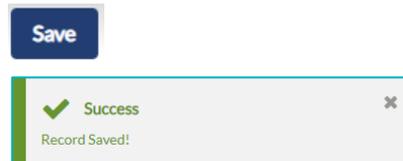
In Registrar, set the Next Year Enrollment Status to the school defined value indicating a contract will be prepared for the student. (Pending, Invite Back, Send Contract, etc.)

Student Enrollment Status

- These options will match the statuses you use in Ascendance
- These will differ between school
- Values with checkmarks will be visible in drop down
 - *Status values must match the values you have established in Ascendance.*



- Select the Save button when you are finished
- Success message will appear

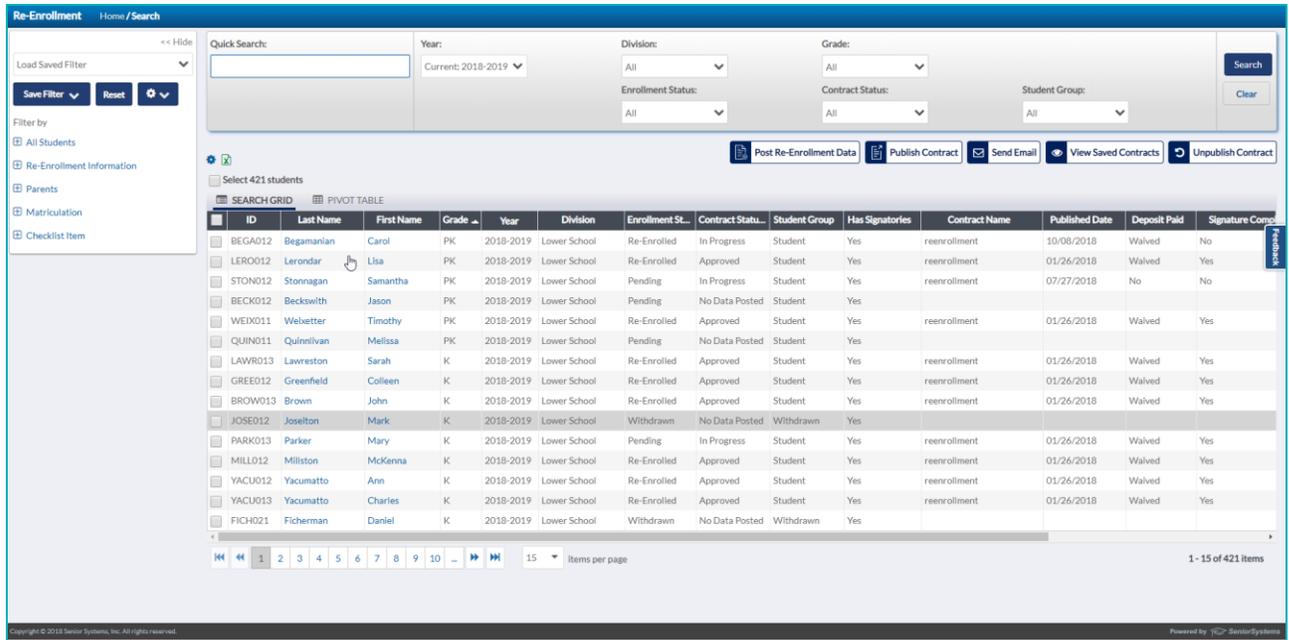


Use the Search Window

Function: Enrollment

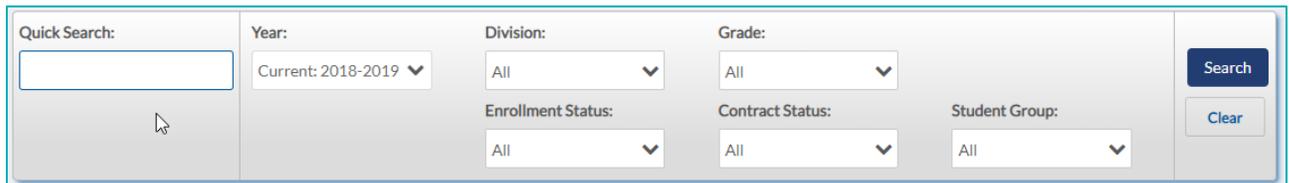
- From ENROLLMENT CENTER submenu, select Re-Enrollment





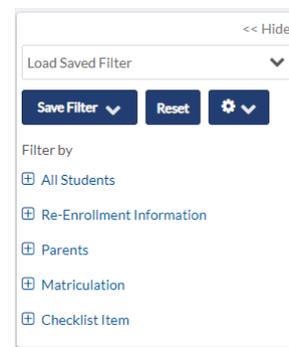
TOP PANE: Quick Filters allow for quick sort of records.

- Enter the word Brown in Quick Search field to list students in Search Grid whose name contains 'Brown'.
- Use Year, Division, Grade, Enrollment Status, Contract Status and Student Group alone or in combination, to search for a subset of students

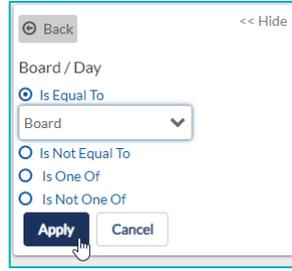


LEFT PANE: Filters allow for more refined searches or queries

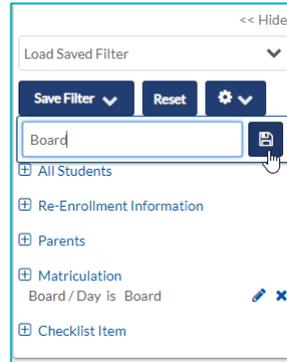
- Example: search for boarding students:
 - Expand Matriculation menu by clicking + icon
 - Select Board/Day from the list
- Refine the filter
- Select an operator: Is Equal To
 - Select a value: Board



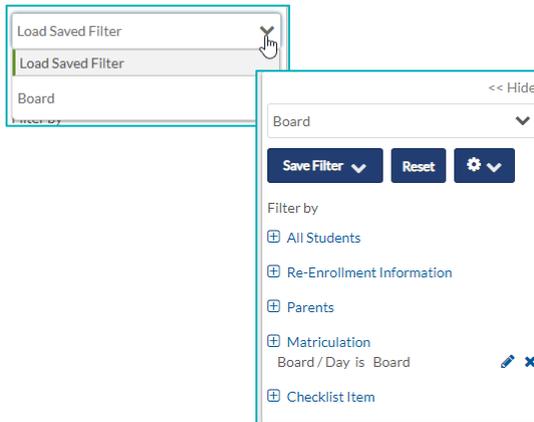
- Select Apply button



- Save frequently used filters
 - Select 'Save Filter'
 - Enter a name for the filter
 - Select Save icon



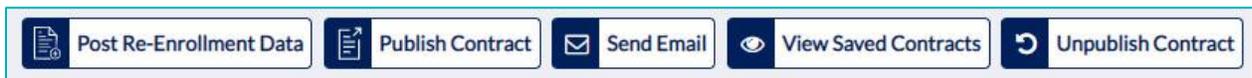
- Load Saved Filter
 - Select down arrow to search for saved filters
 - Select 'Board'



Use the Reset button to remove loaded filters

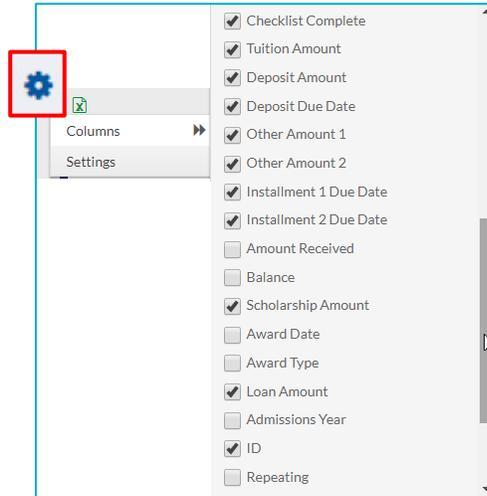
Expand the gear button to set, clear and manage filters

Re-enrollment Task Buttons (common tasks used throughout the season)

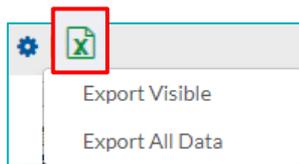


Tool icons: Settings and Export

- Settings
 - Select 'Columns' to add columns to the search grid (shown below)
 - Select 'Settings' and select Restore Default Settings button to reset default columns for the search screen.



- Export data for all students included in latest search (i.e. 44 Boarding students on search window)
 - Select 'Export Visible' to download only columns that the user has selected
 - Select 'Export All Data' to download all columns available in Re-enrollment



Selecting checkboxes next to a student name does not affect exported data. If you select two students on the list and export there will be 44 names in Excel file.

Search Window Views: Search Grid and Pivot Table

Toggle between Search Grid and Pivot Table to explore your data

- Search Grid is standard list view

	ID	Last Name	First Name	Grade	Year	Division	Enrollment
<input type="checkbox"/>	BEGA012	Begamianian	Carol	PK	2018-2019	Lower School	Re-Enrolled
<input type="checkbox"/>	LERO012	Lerondar	Lisa	PK	2018-2019	Lower School	Re-Enrolled
<input type="checkbox"/>	STON012	Stonnagan	Samantha	PK	2018-2019	Lower School	Pending

- Pivot Table allows for multiple ways to view the data.
 - Select a View on the left (Heatmap, Table and Charts)
 - Select a Function on the right (defaults to Count)
 - Drag and drop fields from left to right

The screenshot shows a software interface for creating a Pivot Table. At the top, there are buttons for 'Load Saved Pivot Table...', 'Save Pivot Table', and 'Reset'. Below this, there are tabs for 'SEARCH GRID' and 'PIVOT TABLE'. The 'PIVOT TABLE' tab is active. On the left, there is a list of fields: 'Table', 'Re-Enrollment Deposit Paid', 'Re-Enrollment Signature Complete', 'Enrollment Status', 'Division', 'Age', 'Grade Type', and 'City'. In the center, there is a pivot table with 'Board Day' and 'Grade' as row labels, and 'Count' as the function. On the right, there is a summary table with 'Gender' as a column label, and 'Female', 'Male', and 'Totals' as sub-columns. The summary table contains the following data:

		Gender		
Board Day	Grade	Female	Male	Totals
Board	9	1	5	6
	10	4	4	8
	11	8	7	15
	12	4	11	15
Totals		17	27	44

BOTTOM Navigation

- Use page numbers and controls to scroll through pages
 - Set Items per page to 15, 25, 50 or 100

The screenshot shows a bottom navigation control. It includes a set of page numbers from 1 to 10, followed by an ellipsis and then double arrows for navigation. To the right of the page numbers is a dropdown menu set to '15' with the text 'items per page' next to it.

TIP: Set Items per page to 15 for fastest load time

Post Re-Enrollment Data

From the Search Grid

- Select the checkbox next to each student for whom you want to prepare contracts
- Select the 'Post Re-Enrollment Data' button
- Windows will take you through each step



Enrollment Center

Home > Enrollment

Load Saved Filter << Hide

Save Filter Reset

Filter by:

- Enrollment Information
- Person
- Parents
- Application

Year: 2017-2018

Division: All

Grade: All

Decision: All

Contract Status: All

Quick Search

Search Clear

Send Email Post Re-Enrollment Data View Saved Contracts Publish Contract Unpublish Contract

Select 6 prospects

Last Name	First Name	Grade	Year	Division	Decision	Contract Status	Published Date	Deposit Paid	Signature Compl	Checklist Compl	Tuition Amount	Deposit Amount	Applying FA	
<input type="checkbox"/>	Boitone	Terry	PK2	2017-2018	Primary School	Accepted	Awaiting Approval	01/24/2017	Yes	Yes	Yes	\$12,500.00	\$2,000.00	No
<input type="checkbox"/>	Bumstead	Christopher	7	2017-2018	Middle School	Accepted	In Progress	01/26/2017	No	No	Yes	\$12,500.00	\$2,000.00	No
<input type="checkbox"/>	Caldwell	Joshua	6	2017-2018	Middle School	Enrolled	Approved	02/16/2017	Yes	Yes	Yes	\$30,000.00	\$2,000.00	No
<input type="checkbox"/>	Kobza	Kendall	PR1	2017-2018	Primary School	Accepted	In Progress	02/16/2017	No	No	Yes	\$30,000.00	\$2,000.00	No
<input type="checkbox"/>	Lawrence	Joshua	7	2017-2018	Middle School	Accepted	In Progress	01/25/2017	No	No	Yes	\$11,000.00	\$2,000.00	No
<input checked="" type="checkbox"/>	Manning	Caitlin	8	2017-2018	Middle School	Accepted	No Data Posted				\$0.00	\$0.00	No	

15 items per page 1 - 6 of 6 items

- Enter data necessary to populate contract
 - Two 'Other Amt' fields available. (i.e. New student Fee, Teacher Fund)
 - Two Date fields available for contract (i.e. First installment, Teacher Fund)
- Select Next

Re-Enrollment Data Posting

Re-Enrollment Data	Actions
Tuition Amt: \$24,000.00 Dollars	Update Do Not Update
Deposit Amt: \$2,000.00 Dollars or % of (Tuition - Awards)	Update Do Not Update
Other Amt 1: \$500.00 Dollars	Update Do Not Update
Other Amt 2: 0.00 Dollars	Update Do Not Update
Deposit Due: 02/15/2019	Update Do Not Update
Installment 1 Due: 05/01/2019	Update Do Not Update
Installment 2 Due: 07/01/2019	Update Do Not Update

Next Cancel

A blank field will default to "Do Not Update".

If you want to clear any data in an existing field you can leave the data field empty and select Update.

Re-Enrollment Data Posting

Total students selected: 2

Warnings: None

Click **Confirm** to post enrollment data for the selected students.

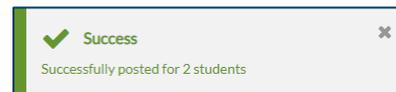
Select all 2 students

<input checked="" type="checkbox"/>	Last Name	First Name	Contract Status	Year
<input checked="" type="checkbox"/>	Lane	John	No Data Posted	2019-2020
<input checked="" type="checkbox"/>	Luppert	Jane	No Data Posted	2019-2020

10 items per page 1 - 2 of 2 items

Previous **Confirm** Cancel

- Confirmation box
 - Select Confirm
 - A Success message will appear



Note the Tuition Amount and other posting details in the table.

Tuition Amoun...	Deposit Amoun...	Deposit Due Date	Other Amount 1	Other Amount ...	Installment 1 Due Date	Installment 2 Due Date	Scholarship An
\$24,000.00	\$2,000.00	02/15/2019	\$500.00	\$0.00	05/01/2019	07/01/2019	
\$24,000.00	\$2,000.00	02/15/2019	\$500.00	\$0.00	05/01/2019	07/01/2019	

Publish Contracts

- Choose student(s) who need contracts and select Publish Contract
- Step through Wizard

Step 1: Select Students

Publish Contract

1 Students 2 Generate Contract 3 Preview & Publish

Total students selected: 2

Warnings: None

Select all 2 students

<input checked="" type="checkbox"/>	Last Name	First Name	Grade	Year	Division	Contract Status
<input checked="" type="checkbox"/>	Lane	John	12	2019-2020	Upper School	Data Posted
<input checked="" type="checkbox"/>	Luppert	Jane	12	2019-2020	Upper School	Data Posted

10 items per page 1 - 2 of 2 items

Next Cancel

Step 2: Generate Contract

- Choose Contract
- Select Signature requirement
- Next

Publish Contract

Students **2** Generate Contract Preview & Publish

Upper School (2019-2020)

Select Contract*: 2019-BOARD

Contract Signature: Require all contract signatories to sign.
 Require only 1 contract signatory to sign. (Default)

Previous Next Cancel

Step 3: Preview & Publish

- Check the box to Open "Send email" wizard after publish process is complete
- Update Publish Date
- Deselect a student if necessary
- Set Columns (Gear)
- Export to Excel (Excel)
- Preview contract
 - If you use conditional statements in your contracts you need to publish before you can preview
 - Conditional Example: show Family Fee only shows if Other Amount 2 is >0
- Select Publish Now

Publish Contract

Students Generate Contract **3** Preview & Publish

Total students selected: 2 Open "Send email" wizard after publish process is complete

Contract Publish Date: 1/25/2019

Select all 2 students

	Last Name	First Name	Grade	Year	Division	Preview Contract
<input checked="" type="checkbox"/>	Lane	John	12	2019-2020	Upper School	Q
<input checked="" type="checkbox"/>	Luppert	Jane	12	2019-2020	Upper School	Q

10 Items per page 1 - 2 of 2 items

Previous Publish Now Save & Publish Later Cancel

TIP: Contracts that use conditional statements must be published to render accurately. During the testing period you change the visible date to be a date in the past so the contract is not visible to any parent.

If you choose **Save & Publish Later** use the View Saved Contracts button when you are ready to proceed



Send Email

Step through Email Wizard

Step 1: Pick Template

- Check Signatories
- Select Next

Send Email

1 Pick Template 2 Recipient List 3 Preview/Edit Email 4 Results Log

Pick from existing template: Publish Re-Enrollment Contract + Add New Template

(Note: Email will be sent to contract signatory and not to student)

Send only to signatories who have not signed the Re-Enrollment contract

Name: ReEnrollmentPublishContract Type: System
Display Text: Publish Re-Enrollment Contract Sender's Email:
Subject: Re-Enrollment Contract Information Sender's Name:
Attachments: BCC:
Reply To Email:

Next Cancel

Step 2: Recipient List

- Select Next

Send Email

1 Pick Template 2 Recipient List 3 Preview/Edit Email 4 Results Log

Note: Emails will be sent to each recipient as well as inserted into their communication history

Communication Category: Public

An email will be sent to 2 recipients.

Contract Signatory	Primary Email	Student Name	Contract Status
John Lane		John Lane	Published
Allison Luppert		Jane Luppert	Published

10 Items per page 1 - 2 of 2 items

Previous Next Cancel

Step 3: Preview/Edit Email

- Use Edit icon to personalize



Use Save /Cancel icon

- Use arrow in blue header to advance through recipients
- Select Send

Send Email

1 Pick Template 2 Recipient List 3 Preview/Edit Email 4 Results Log

John Lane - Publish Re-Enrollment Contract

Dear John,
We have published John's Re-Enrollment Contract. It is now visible online from your Parent Portal. You can access your account here.
Thank you.

Previous Send Cancel

Step 4: Results Log

- Review Recipients
- Select Close

Send Email

1 Pick Template 2 Recipient List 3 Preview/Edit Email 4 Results Log

Number of Successful emails: 2
Number of Failed emails: 0

Contract Signatory	Primary Email	Student Name	Contract Status	Email Status
John Lane		John Lane	Published	Successful
Allison Luppert		Jane Luppert	Published	Successful

10 Items per page 1 - 2 of 2 items

Close

Review Student Re-Enrollment Details

- From the Search Grid select a student name
- Turn edit mode to on as needed
- 4 menu items on left navigation: General, Contract, Transaction, Approval

General view

- Re-enrollment Info
- Student Info
- Financial Aid

The screenshot shows the 'Re-Enrollment' form for a student named John Lane. The form is divided into two main sections: 'Re-Enrollment Info' and 'Student Info'. The 'Re-Enrollment Info' section includes fields for Tuition Amt (\$25,000.00), Deposit Due (02/15/2019), Deposit Amt (\$2,500.00), and two installment due dates. The 'Student Info' section includes fields for Student Group (Student), Enrollment Status (Pending), Division (Upper School), Board/Day (Day), Grade (12), Grade Type, Admission Year, and Mid Year. A navigation menu on the left shows 'General', 'Contract', 'Transactions', and 'Approval'. The top of the form displays the student's name, ID, Grade, Year, Division, and Enrollment Status.

Contract view (two tabs): ACTIVE CONTRACT | ARCHIVED CONTRACT(S)

- ACTIVE CONTRACTS tab shows contract progress
 - Turn edit mode on to override a setting
 - Scroll down to see signatories and checklist progress

Note: Options for View and /or Unpublish a contact from Active Contract tab.

The screenshot shows the 'Contract view' with the 'ACTIVE CONTRACT' tab selected. The 'Contract Information' section displays the following details: Contract Name (19BRD-FA_SCHOL), Published Date (11/26/2018 09:29 PM), Received Date, and Contract Portal Visibility (checked). The 'Deposit Paid' section has a radio button selected for 'No' and an 'Override and mark as Paid' checkbox. The 'Signature Complete' section has a radio button selected for 'No' and an 'Override and mark as Complete' checkbox. The 'Checklist Complete' section has a radio button selected for 'No' and an 'Override and mark as Complete' checkbox. A 'View Contract' button and an 'Unpublish' button are visible in the top right corner.

Note: The user can email Signatories directly from Active Contract tab.

Visible To: 8/1/2019

Contract Signatories

Send Email

Contract Signature: Any One

Total Signature(s) Required: 1

Signature(s) Pending: 1

Total Deposit: \$2,000.00

Amount Received: \$0.00

Pending

Balance: \$2,000.00

Actions	Name	Relation	Relationship Group	Contract Signature	Amount Received	Signed	Signature Date	User ID	Notes
	<input type="checkbox"/> John Lane	Father	Parent/Guardian	Optional	\$0.00	No			
	<input type="checkbox"/> Alison Lane	Mother	Parent/Guardian	Optional	\$0.00	No			

Checklist Information

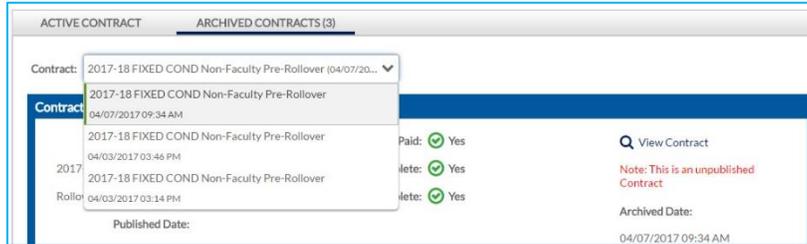
Note: The user can mark an item Complete from Active Contract tab.

Checklist Information

Mark Required Completed

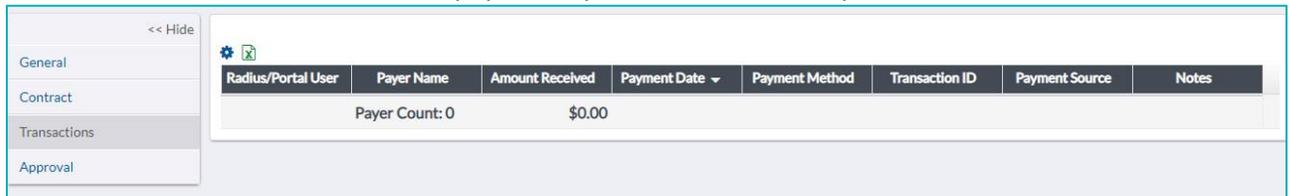
Actions	Checklist Item	R...	Status	Completed	Li...	Media	Notes
	Student Parent Handbook	<input type="checkbox"/>	Not Submitted				
	Release Form	<input checked="" type="checkbox"/>	Not Submitted				

- ARCHIVED CONTRACTS tab will show history of unpublished contracts
 - You cannot delete a contract



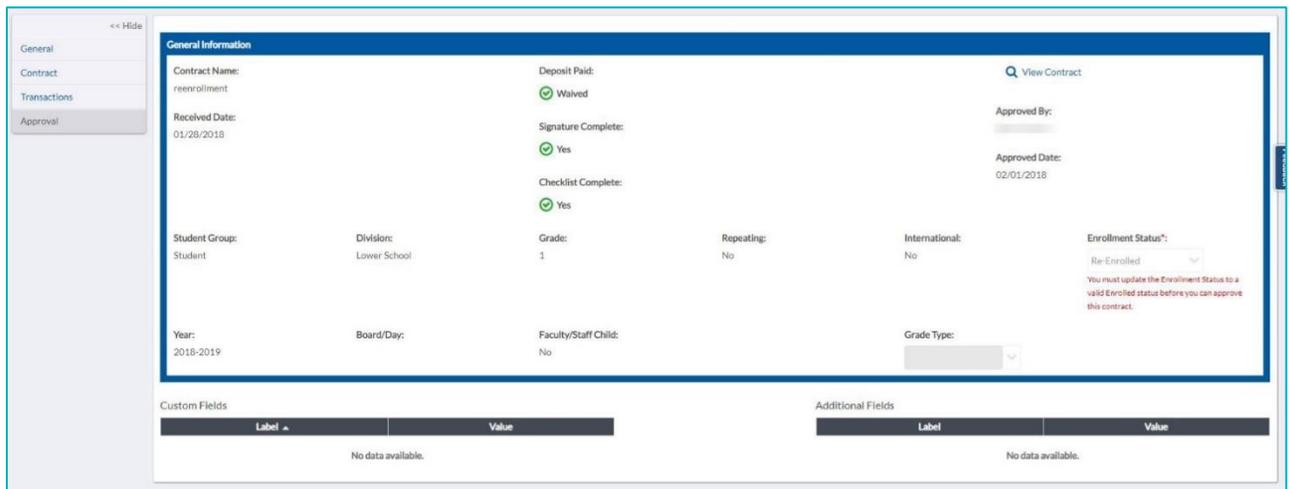
Transactions view

Details about online payments will be listed here. The user can also manually add a payment here, ex: if a check was mailed to the school or payment by credit card over the phone.



Approval view

- Enrollment Status must be changed on approval. Note the red text!
- Responses to any custom fields used in the contract will be listed here



Unpublish a Student Contract

- Open a student record and Select 'Unpublish' Contract button
 - Review the message
 - Option to open Send Email if you need to update parent

Unpublish Contracts

Note: Contracts will be unpublished for (1/1) selected prospects.
Unpublished contracts cannot be republished.
You can access unpublished contracts in Archived contracts tab.

Open "Send email" wizard after unpublish process is complete

Unpublish **Cancel**

- Select Unpublish and will receive success message
- If you select Open "Send email" follow the wizard
 - pick the template, review the recipients, preview email, send, log

1 Pick Template 2 Recipient List 3 Preview Email 4 Results Log

Pick from existing template: Unpublish Enrollment Contract

(Note: Email will be sent to contract signatory and not to prospect)

Send only to signatories who have not signed the enrollment contract

Name: EnrollmentUnpublishContract	Type: System
Display Text: Unpublish Enrollment Contract	Sender's Email:
Subject: Enrollment Contract Unpublished	Sender's Name:
Attachments:	BCC:

Dear John,
We have unpublished
Parent Portal, and you
You can access your
Thank you.

2 Recipient List

Note: Emails will be sent to each recipient as well as inserted into their communication history

Communication Category: Document

Contract Signatory
Julie Manning

10

3 Preview Email

Julie Manning - Enrollment Contract Unpublished

Dear Julie,
We have unpublished the Enrollment Contract for Cait that was published earlier. This means that the Contract has been removed from the Enrollment menu
in the Parent Portal, and you no longer have access to the Contract's details.
You can access your Parent Portal online [here](#).
Thank you.

Send Previous Cancel