



RADIUS

# Getting Ready for Enrollment Season: Annual Tasks

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# Getting Ready for Enrollment Season

Preparing for Enrollment and Re-Enrollment activities requires creating a new Enrollment Year for each division in Radius. There are annual tasks to be completed in the Ascendance Accounts Receivable module on current students' next year record. It is best practice to review Radius Contracts, Custom fields, Checklist items Communications Templates and all parent facing messaging each year. Enrollment and Re-enrollment have different audiences. Enrollment relates to the Prospect audience and Re-Enrollment relates to your existing student audience.

## RADIUS: Setup a New Enrollment Year

### Enrollment Years

HOME | SETUP | Enrollment Years

**SETUP**

- Enrollment Forms
- Master Checklist
- Master Decision List
- Enrollment Years

- Select the **Add** button

Quick Search:  Search

+ Add

Division	Year	ENR Current Yes	RE-ENR Current	ENR Open	RE-ENR Open	ENR Visible From	RE-ENR Visible From	ENR Visible To	RE-ENR Visible To
Lower School	2022-2023	No	Yes	Yes	Yes	01/28/2022 12:00 A	01/28/2022 12:00 A	10/01/2022 12:00 A	10/01/2022 12:00 A
Upper School	2022-2023	No	Yes	Yes	Yes	01/28/2022 12:00 A	01/28/2022 12:00 A	10/01/2022 12:00 A	10/01/2022 12:00 A
Middle School	2022-2023	No	Yes	Yes	Yes	01/28/2022 12:00 A	01/28/2022 12:00 A	10/01/2022 12:00 A	10/01/2022 12:00 A

- Select Copy From Existing Setup
- Enter years in Copy From and Copy To
- Select Save

**Add Enrollment Year Setup**

Copy From Existing Setup  
 Create New (Blank Setup)

Copy From

Division: Lower School

Year: 2022-2023

Copy To

Division: Lower School

Year: 2023-2024

Save
Cancel

*This is done for each division.  
Use the menu on the left side of the screen to set up the new enrollment year.*

## Admissions | Decisions

EDITING  Home / Search / Enrollment Year Setup < 1 of 55 > Skip to: Lower School ( ...

Lower School

<< Hide

Admissions  
Decisions  
Maintenance  
Enrollment  
Re-Enrollment

Portal Visible Date:

Only Show Active

Actions	Active	Decision Name	Decision Type	Portal Display	Abbreviation	Include in ENR	Portal Visible	Checklist Visible
	<input checked="" type="checkbox"/>	Accepted	Accepted	Accepted	A	Yes	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Wait List	Wait Listed	Wait List	WL	Yes	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Enrolled	Enrolled	Enrolled	E	Yes	<input type="checkbox"/>	<input type="checkbox"/>

\* Drag rows up and down for custom order

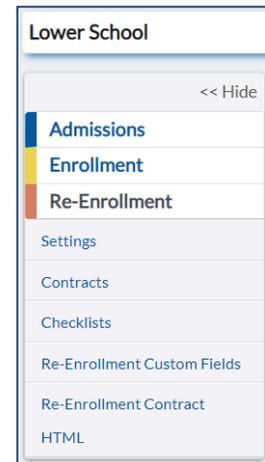
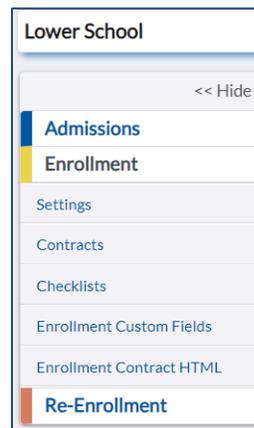
- Review Admissions decisions (toggle Editing button to ON)
- Option to select Only Show Active
- Select Active to make the decision available in Enrollment/Re-Enrollment process
- Accepted and Enrolled should remain active
- Add Waitlist only if you want to change a decision on the student full record and have it visible in the Enrollment Search window
- Portal Visible/Checklist Visible does not apply to enrollment process
- Select Save

## Enrollment and Re-Enrollment Menus

Enrollment and Re-Enrollment settings are established for two different audiences: incoming students and returning students. This enables a school to store different dates, contracts and custom HTML values for Enrollment and Re-Enrollment.

Choose one division and make your changes, as needed, in each submenu

- Settings
- Contracts
- Checklists
- Enrollment Custom Fields
- Contract HTML



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Enrollment and Re-enrollment may have different Settings, Contracts, Checklists, Custom Fields, and Contract HTML values.

The values set in one division will apply to all divisions.

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*This document will step through the Re-Enrollment submenus.*

## Settings

The settings in the top panel apply to all divisions. Re-Enrollment and Enrollment can open and close on a different schedule.

EDITING ON Home / Search / Enrollment Year Setup < 2 of 62 > Skip to: Lower School (2023-...)

Lower School 2023-2024\*

<< Hide

Admissions  
Enrollment  
Settings  
Contracts  
Checklists  
Enrollment Custom Fields  
Enrollment Contract HTML  
Re-Enrollment

### Senior Academy Settings

The following settings apply to all divisions in Senior Academy:

Open for Enrollment:

Contract Visible Dates: Visible From: 01/20/2023 12:00 AM

Visible To: 09/29/2023 12:00 AM

Current Year:

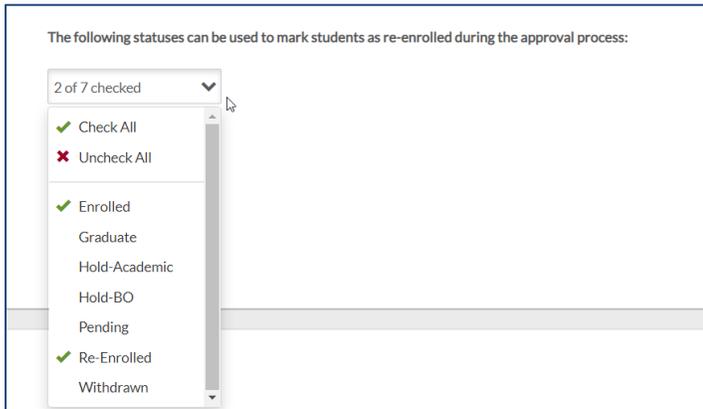
### Lower School Settings

The following settings only apply to Lower School:

Signature setup for published contracts

- Select Open for Enrollment/Re-Enrollment: *This applies to all divisions!*
- Multiple years can be open at the same time but only one year can be marked Current Year
- Set default visibility dates
- Select Current year when you are ready to work on records for the new year. Current year will function as the default filter on search screens.

- The statuses used in approval process are specific to each school. It is important to use the terms consistently. In the example below a contract being approved for a new student would be marked Enrolled and a returning student's contract would be approved using the status of Re-Enrolled.



## [Division] Settings

- Optional: Require profile update
- This is only available in Re-Enrollment
- Choose Signatories: Require All or Require Any
- Tracking status traditionally does not change
- Select Save

Lower School Settings

The following settings only apply to Lower School:

Require profile update:  ⓘ

Signature setup for published contracts ⓘ

Require all contract signatories to sign

Require any contract signatory to sign

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The following status values will be used for tracking contracts:

After publishing the contract to the signatories\*:

After the signatory has started progress\*:

While the submitted contract is pending approval\*:

After the school has approved the contract\*:

## Contracts

- Use the magnifying glass icon to preview a contract.
- If your school uses conditionals, it would be more efficient to review a contract associated with a student.
- If any changes need to be made, please submit a PDF document or scanned image with changes listed to your implementation specialist.

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*If your contract needs to be updated, please do not wait till the last minute; return your contract edits to us, as soon as possible!*

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## Checklists

- Checklists are built per division
- Click on pencil icon to edit details of the checklist item
  - Verify URLs, resources linked to URLs
  - Checklist forms can be reviewed at Enrollment | Setup | Enrollment Forms

## Custom Fields

- Custom field are rarely used in the Radius enrollment. These values only save to a Person's record and do not show on contract approval window.
- Limited to 10 Custom fields

## Custom HTML Fields

Custom HTML and Custom Text are merge fields used in contracts. These allow a school you update annual dates and terms without requiring a programmer.

- Edit information as needed for each audience, Enrollment and Re-Enrollment
- Enrollment IDs will apply across all divisions
- Re-Enrollment IDs will apply across all divisions
- These fields update any published contracts that have not been submitted

The screenshot displays the 'Enrollment Year Setup' interface. The left sidebar contains navigation options: Admissions, Enrollment (selected), Settings, Contracts, Checklists, Enrollment Custom Fields, Enrollment Contract HTML, and Re-Enrollment. The main content area is divided into two sections: 'Custom HTML' and 'Custom Text'. Both sections include instructions and a table of configurations for 'Senior Academy'.

**Custom HTML**

You may enter custom HTML for your enrollment contracts here. Please note that changes to HTML that is already used on the enrollment contract will take effect immediately. For assistance please contact the Custom Branding group.

The following HTML will apply to all divisions in Senior Academy:

Preview	ID	Description	Content
	1	Finance	Test

**Custom Text**

You may enter custom text for your enrollment contracts here. Please note that changes to HTML that is already used on the enrollment contract will take effect immediately. For assistance please contact the Custom Branding group.

The following text will apply to all divisions in Senior Academy:

ID	Description	Text
1	Year	2023-2024
2	Discount	May 1, 2023
3	Cancel By	June 1, 2023

# RADIUS: Review Parent Facing Communications

Each season is important to review all communications that are parent facing. This includes system messages and standard communication templates.

To make changes on Instructions screens turn EDITING to ON (F2)

- If a WYSISYG editor appears use menu to modify text, insert images and add hyperlinks
- Select Source to edit the HTML code
- Insert merge fields to personalize your message

## Parent Portal Instructions: *Open and Closed messages*

ADMINISTRATION | BUSINESS UNITS | [Select division]

- Review for both Enrollment and Re-Enrollment (Re-Enrollment shown here)

Senior Academy

EDITING  Home/Search/Business Units

<< Hide

Details

Divisions / Grades

Enrollment

Re-Enrollment

Comments

Maintenance

### Instructions for open Re-Enrollment

**Online contract(s) must be completed and deposits made by March 1st.**

Please review and sign the re-enrollment documents for your child, below. Please note: Your re-enrollment is not considered complete unless ALL of the "Required" checklist items have been completed and submitted to the school.

1. Complete the enrollment contract for your child
  - Click on the "View/Sign" button to access the enrollment agreement. When finished click "submit".
  - All responsible parties must log in and sign all contracts separately

### Instructions for closed Re-Enrollment

Please Enter your Re-Enrollment instructions here. The instructions setup is available in Administration > Business unit.

Save Cancel

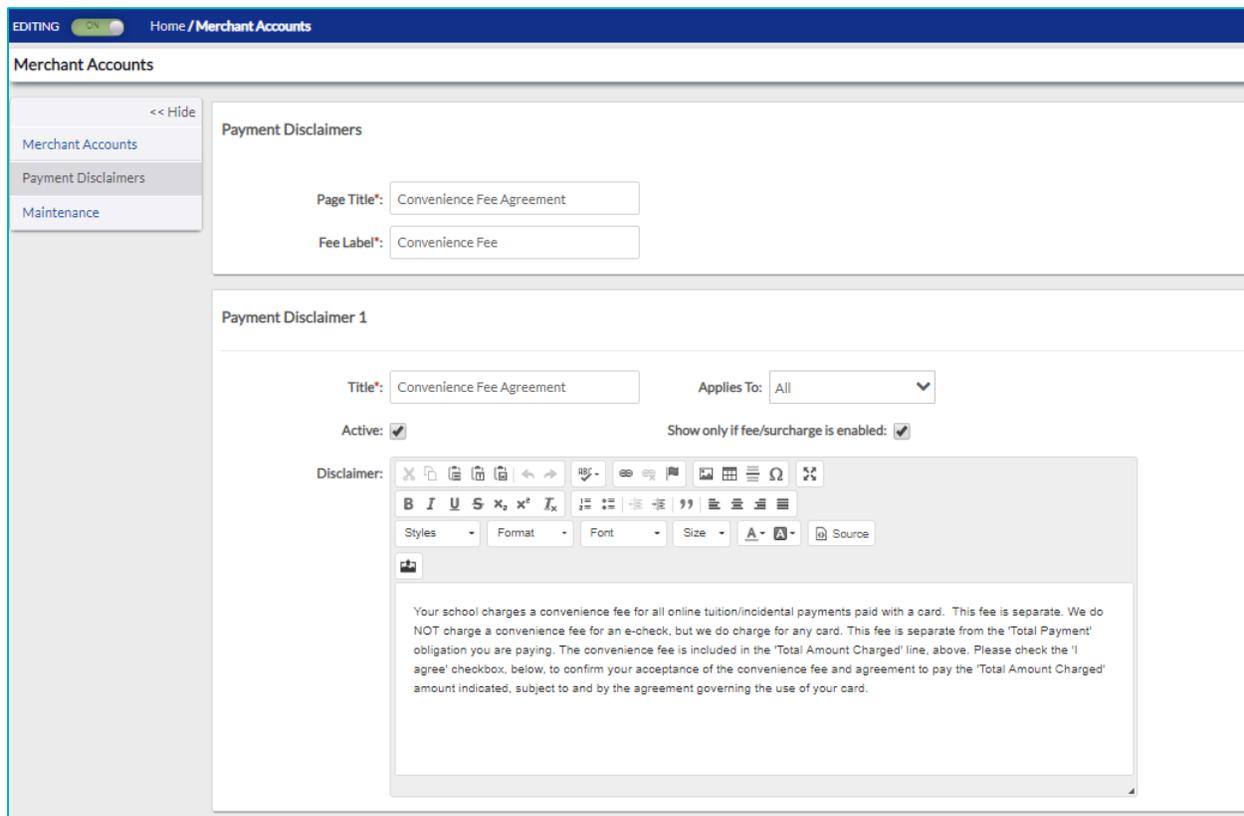
- Option to turn off signature box under Additional Settings



- Select Save after making changes

## Payment Instructions: *Payment Disclaimers*

### ADMINISTRATION | MERCHANT ACCOUNTS | Payment Disclaimers



EDITING ON Home / Merchant Accounts

Merchant Accounts

<< Hide

Merchant Accounts

Payment Disclaimers

Maintenance

Payment Disclaimers

Page Title\*: Convenience Fee Agreement

Fee Label\*: Convenience Fee

Payment Disclaimer 1

Title\*: Convenience Fee Agreement Applies To: All

Active:  Show only if fee/surcharge is enabled:

Disclaimer:

Your school charges a convenience fee for all online tuition/incidental payments paid with a card. This fee is separate. We do NOT charge a convenience fee for an e-check, but we do charge for any card. This fee is separate from the 'Total Payment' obligation you are paying. The convenience fee is included in the 'Total Amount Charged' line, above. Please check the 'I agree' checkbox, below, to confirm your acceptance of the convenience fee and agreement to pay the 'Total Amount Charged' amount indicated, subject to and by the agreement governing the use of your card.

## Payment Instructions: *Payment Types, Instructions and Comments*

### ADMINISTRATION | PAYMENT | [Select division]

- Same messaging applies to both Enrollment and Re-Enrollment; only need to set once for each division.

## Payment Types

The screenshot shows the 'Payment Types' configuration page. On the left is a navigation menu with options: Enrollment / Re-Enrollment, Payment Types (selected), Payment Instructions, Payment Comments, and Payment Confirmations. The main content area is titled 'Paper Check' and includes a checkbox for 'Allow Payment by Paper Check'. Below this is a 'Merchant Account' dropdown menu set to 'Diamondmind'. The page is divided into two columns: 'Credit/Debit Card' and 'eCheck'. Under 'Credit/Debit Card', there are sections for 'American Express', 'Discover', 'MasterCard', and 'Visa'. Each section has a checked 'Allow' checkbox and an 'Add Convenience Fee' section with a dropdown set to 'Percentage' and a value of '2.80 %'. Under 'eCheck', there is a checked 'Allow eCheck Payments' checkbox and an 'Add Convenience Fee' dropdown set to 'No'.

## Payment Instructions

The screenshot shows the 'Payment Instructions' page. At the top, it says 'EDITING' and 'Home / Search / Payment Setup'. The page title is 'Payment Setup: Middle'. On the left is a navigation menu with options: Enrollment / Re-Enrollment, Payment Types, Payment Instructions (selected), Payment Comments, and Payment Confirmations. The main content area has three sections: 'General Instructions' with a thank you message and a note that re-enrollment is not complete until a deposit is received; 'Pay by Credit Card or Debit Card' with a 2.8% convenience fee notice and a list of accepted cards (MasterCard, American Express, Discover, Visa) and a note that Visa debit cards are not accepted; and 'Pay by eCheck' with a welcome message and a note that it results in an immediate draft from a checking account. A contact instruction for the Business Office or Admission Office is also provided.

## Payment Comments

Field	Value	Text
Comment Field 1	Fixed Text	Online Enrollment
Comment Field 2	Student Name	
Comment Field 3		
Comment Field 4		
Comment Field 5		
Comment Field 6		
Comment Field 7		
Comment Field 8		
Comment Field 9		
Comment Field 10		

## Payment Confirmations

Field	Value	Text
Send Email:	<input type="checkbox"/>	
<p>Thank you for submitting your re-enrollment deposit. Once your payment has been processed, your child's enrollment will be complete. Questions about payments or tuition? Contact the Business Office at (XXX-XXX-XXXX)</p>		
Send Email:	<input type="checkbox"/>	
<p>Thank you for submitting your re-enrollment deposit. Once your payment has been processed, your child's enrollment will be complete. Questions about payments or tuition? Contact the Business Office at (XXX-XXX-XXXX)</p>		

## Communication Templates

### ADMINISTRATION | COMMUNICATIONS | Communication Templates

Confirmation email templates are set up to be sent upon completion of certain tasks.

- Type
  - System = protected template that has a specific function within Radius
  - Public = template created by one person and available for all Radius users



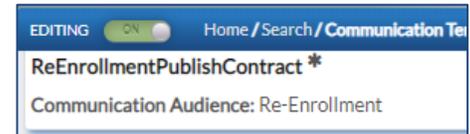
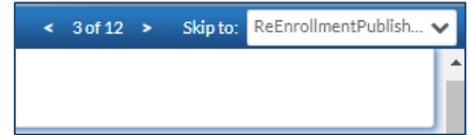
- Select the communication to review and update the templates as needed

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Account Activation	Event Reminder
Application Submission	Event Response
Checklist Item Resubmit	Inquiry Letter for Prospect
Checklist to Parent(s)	Inquiry Submission
Contract Signature Incomplete	Open House
Decision Letter	Password Reset
Decline Recommendation	Payment Reminder
Enrollment Checklist Incomplete	Publish Enrollment Contract
Enrollment Checklist Item Resubmit	Send Recommendation
Enrollment Deposit Payment	Test Prospect Merge Fields
Event Cancellation	Unpublish Enrollment Contract
Event Invite	Welcome
System Templates	

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- There are two options available to navigate through templates (top right corner)
- Left and right arrows: < 3 of 12 >
- Skip to: feature offers a drop-down menu
- An asterisk next to the Template name indicates that there have been changes made that have not been saved.

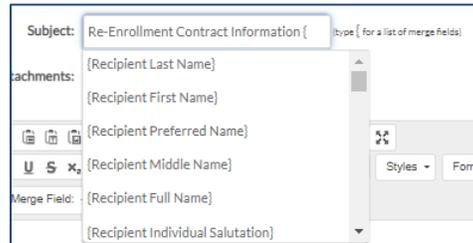


*Do not cut and paste formatted text from Word or Broadcast email templates, embedded formatting may cause unexpected results.*

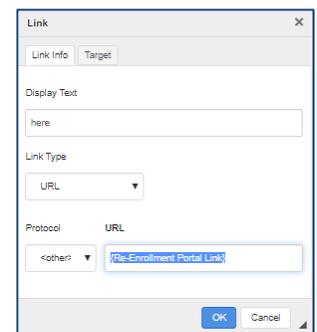
here. Thank you.'"/>

- With EDITING on you can modify elements of the template
  - Select/deselect Active checkbox
  - Display text (title of template will appear in communication options)

- Edit Subject
  - Type an open bracket ( { ) in the subject field to see a list of merge fields you may include in the subject line.



- Update email addresses
- Edit/create you message in the editor
  - You can use HTML Source code to copy body of a message to another template
  - **Caveat:** Re-enrollment and Enrollment Links point to distinct locations in the system.
  - Use the Insert Merge Text options to personalize the message
- Select Save
- Set Editing to OFF to preview body of your message




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*Best Practice: always test your emails after making hyperlink changes!*

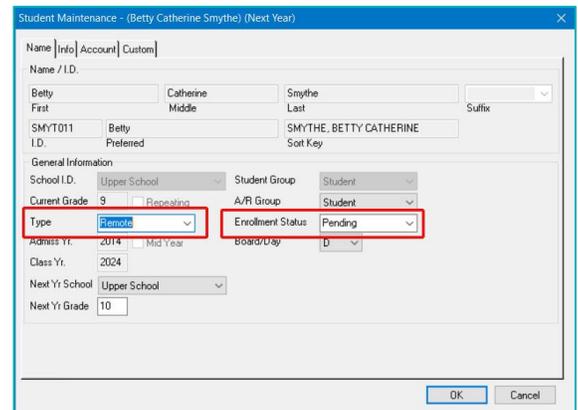
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## ASCENDANCE: Update Next Year Records

It is important to review, update or clear Student [Next Year] fields that are used by your school before beginning the enrollment cycle. Use Global updates to facilitate this in the Accounts Receivable (AR) module. This process will vary from school-to-school.

AR Students' [Next Year] details to consider:

- Name Tab:
- Grade type
- Enrollment Status



Student Maintenance - (Betty Catherine Smythe) (Next Year)

Name | Info | Account | Custom

Name / I.D.  
Betty Catherine Smythe  
First Middle Last Suffix  
SMYT011 Betty Preferred SMYTHE, BETTY CATHERINE  
I.D. Sort Key

General Information  
School I.D. Upper School Student Group Student  
Current Grade 9 Repeating A/R Group Student  
Type School Enrollment Status Pending  
Address Yr. 2014 Mid Year Board/Day D  
Class Yr. 2024  
Next Yr School Upper School  
Next Yr Grade 10

OK Cancel

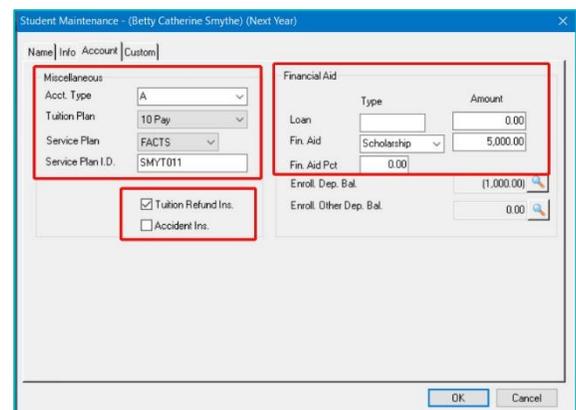
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Use **Global Updates** to change **Student (Next Year) Enrollment Status** in Ascendance. The records in Radius will reflect the new status after the next sync cycle (5-10 minutes).

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Account Tab:

- Miscellaneous Fields
- Account Type, Tuition Payment Plan, Service Plan Service Plan ID
- Financial Aid fields
- Loan, Fin. Aid, Fin AidPct
- Tuition Refund Insurance
- Accident Insurance



Student Maintenance - (Betty Catherine Smythe) (Next Year)

Name | Info | Account | Custom

Miscellaneous  
Acct. Type A  
Tuition Plan 10 Pay  
Service Plan FACTS  
Service Plan I.D. SMYT011  
 Tuition Refund Ins.  
 Accident Ins.

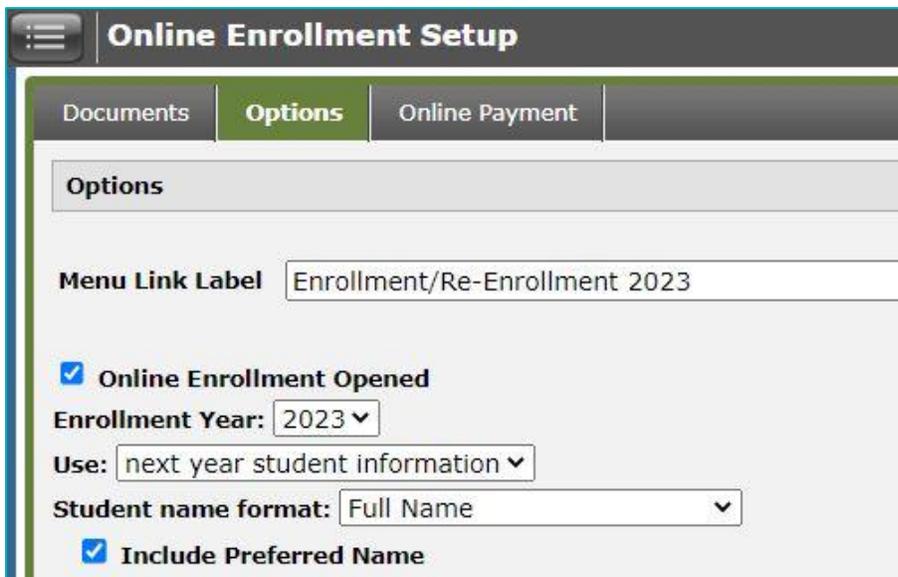
Financial Aid  
Type Amount  
Loan 0.00  
Fin. Aid Scholarship 5,000.00  
Fin. Aid Pct 0.00  
Enroll. Dep. Bal. (1,000.00)  
Enroll. Other Dep. Bal. 0.00

OK Cancel

**IMPORTANT to check My Backpack setting before sending contracts!**

My Backpack plays a leading role in determining how payments are applied. It is important to update the MBP Online Enrollment setting to reflect the proper season and using next year student data.

For 2023 Enrollment Year:



The screenshot shows a web interface titled "Online Enrollment Setup". It has a navigation bar with three tabs: "Documents", "Options" (which is selected and highlighted in green), and "Online Payment". Below the navigation bar, there is a section titled "Options".

Within the "Options" section, the following settings are visible:

- Menu Link Label:** Enrollment/Re-Enrollment 2023
- Online Enrollment Opened**
- Enrollment Year:** 2023 (dropdown menu)
- Use:** next year student information (dropdown menu)
- Student name format:** Full Name (dropdown menu)
- Include Preferred Name**