



# Ravenna-to-Radius AE Workflow

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### Ravenna ADMIT Workflow

 School uses the 'All Applicants' list to select 'Accepted' applicants who are ready for enrollment contracts.

 In the <u>With Selected</u> drop-down, select Send 'Applicant Admitted' Message to Connected Products option to initiate push of applicant data to Radius.

#### Incoming Applicants RAVENNA TIPS Have a question? Don't forget to check out our Help Center! Run Saved List: (select one) Run Delete Create New List Apply Grade: Any Gender: Any Application Status: Complete Applie Select Columns Run List Save List Reset List Showing 1-2 of 2 Page: Prev 1 Next App. Status Int. Status Name Read Seen Star [First Last] [▲▼] [\*\*] Glasser, Caleb complete 🌙 done \* . Reynolds, Sophia complete 🧳 done \* Showing 1-2 of 2 Page: Prev 1 Next Select All | Select This Page | Clear | Export List With selected:



#### This is a one way integration.

The 'Is Matriculating' field is the only field that updates back to Ravenna when an applicant is marked "Enrolled" in Radius. For this reason, applicants are only pushed to Radius AE when you are ready to offer a student an enrollment contract.



### **Radius Prospects**

• Students initially appear in Radius under the Prospects menu. The red badge next to Approvals indicates there is a record that needs to be reviewed.

PROSPECTS Prospects Approvals

• Select Approvals to see table of applicants

	Home/Ap	provals													
Approval															
	<< Hide	Applications													
Applications 1		First Name:	Year:	0	Grade:										
		Ex: John	All	~	All 🗸 Filter	Clear									
		Last Name:	Division:												
		Ex: Smith	All	~											
		• 🛛													
		Prospect First	Prospect Last	•	Year		Division		Grade	Submitted	Decision Received	Current Decision	Parents	Warning	
		Sophia	Reynolds		2019-2020	Ψ•	oper School	12		01/10/2019	admit	Accepted	Senior Systems Colleen Reynolds	Possible parent duplicates.	*
															_

- Turn Editing mode to on and note the change to the table below
- The name is now blue, indicating a hyperlink to record details
- Note the red warning: Possible parent duplicates
- Select the green Checkmark icon to begin review of incoming information

	Home/A	pprovals					
Approval							
	<< Hide	Applications					
Applications 🕚							
		First Name:	Year:		Grade:		
		Ex: John	All	~	All 🗸	Filter Clear	
		Last Name:	Division:				
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		Soj	phia 🖓	Reynolds		2019-2020	U



- Note the breadcrumb navigation for **Duplicate Search**
- Prospect info is reviewed first
- Select Not a Duplicate Create New

rynolds Year: 2019-2020 Division: Upper Schoo	Grade: 12	
ent School > Sibling Duplicates		
	Primary Address	睿 Parent Info
	PRIMARY ADRESS 201 Boston Post Road Marlborough, MA 01752	otimuktyskebit t Mr. Senior Systems
onone Female		(SOB) 888-0101 (Hone) PERABIT
		(888)886-8888 (word)
		PRIMARY INVENTI2 Mrs. Colleen Reynolds
		Personal PEIMARY (508) 888-0101 (Home: PEIMARY
	Not a Duplicate Create New	Not finding what you are looking for? Q Advanced Search
	ynelds Year 2019-2020 Division: Upper Schoo nrt School > Sibling Duplicates caroos Female	yneids Year 2019-2020 Divisier Usper School Grade 12 mt School > Sibline Dualicates

- Household information appears next (Note the breadcrumb navigation)
- If there is a possible duplicate a panel will appear at the bottom of the screen
- Select Not a Duplicate Create New you know this is not a duplicate family
- Select "Merge With Parent ..." link if applicable

terroving Application For: Sophila Reynolds 'Year: 2019-2020 Dividen: Upor S  Applicate Search: 'Yanget > Household > Current School > Sibling Duplicates  froming Application  PRIMARY PARENT 1  Note  PRIMARY PARENT 1  Note Charge Reynolds  Cobcet  Freade  Freade  Primary Prima	hool Greate 12  PRIMARY PARENT 2  PRIMARY PARENT 2  WWE MA Series Systems Bacanous B	
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- The **Duplicate Search Screen** offers a clear view of data with an opportunity to update before writing to Radius database
- Blue panes (left) = Incoming data
- Beige panes (center) = **Existing** data stored in Radius
- Green panes (right) = **Auto-Merged** values that will be written to database

Do NOT use **Swap Parent Order** if incoming data aligns, left to right, with Existing Parent Data. In the instance below we would NOT use swap feature; Mom is new and Dad is correctly matching up across bottom panel.

- Note the pencil icons that allow you to edit values
- When you are satisfied with Auto-Merged Data Selections select Record Merge Complete button (bottom)

Duplicate Search:		
Applicant > Household > Current School > Sibling Duplie	cates	
Incoming Parent Data Swap Parent Order X	Existing Parent Profile	Auto-Merged Data Selections
PRIMARY PARENT 1	PRIMARY PARENT 1	PRIMARY PARENT 1
NAME		NAME
Mrs. Colleen Reynolds		Mrs. Colleen Reynolds 📝
GENDER		GENDER
Prinate		Female 🕜
Mother		PHONE NUMBER
PHONE NUMBER		(508) 888-0101 (Home) PRIMARY
(508) 888-0101 (Home) PRIMARY		EMAIL ADDRESS
EMAIL ADDRESS		(Personal) PRIMARY
(Personal) PRIMARY		RELATIONSHIP TO PROSPECT
Mother		Mother
	Use All Existing Primary Parent 1 Data 🥹	
PRIMARY PARENT 2	PRIMARY PARENT 2	PRIMARY PARENT 2
NAME	NAME	NAME
Mr. Senior Systems	Mr. Senior Systems	Mr. Senior Systems
GENDER Male	GENDER Male	GENDER
RELATIONSHIP TO PROSPECT		PEL ATIONICHID TO PROSPECT
Father		Father
PHONE NUMBER	PHONE NUMBER	PHONE NUMBER
(508) 888-0101 (Hame) PRIMARY		(508) 888-0101 (Home) PRIMARY
(777) 777-7777 (Cell)		(777) 777-7777 (Cell)
(888) 888-8888 (Work)		(888) 888-8888 (Work)
EMAIL ADDRESS	EMAIL ADDRESS	EMAILADDRESS
(Personal) PRIMARY		(Personal) PRIMARY
Father		Father
PRIMARY ADDRESS	PRIMARY ADDRESS	PRIMARY ADDRESS
201 Boston Post Road Marlborough, MA 01752	201 Boston Post Road Marlborough, MA 01752	201 Boston Post Road Marlborough, MA 01752 📝
	Use All Existing Company Data 🥥	
		Record Merge Complete     Cancel Merge



The Approval process will step you through Company Information, Current Schools and Sibling screens if the Ravenna record collected that information.

**Company Information:** If the record has parent work information you will see the Incoming Company window. You will have multiple options:



- When no duplicate warning appears you have two options:
- Select Not a Duplicate Create New to add a company
- Select Ignore and Continue to skip adding details
- When a possible duplicate exists use the **Merge** pane.
- You may be prompted to select a street address to confirm that the address matches the value in the database. Select Finish.



- The Duplicate Search Screen will appear for company info
- Select Record Merge Complete button Record Merge Complete



Current School: If there is a possible duplicate you will have the opportunity to merge

Duplicate Search: Applicant > Household > Current School > Sibling Duplica	ites	
Incoming Application Data	Existing School Profile	Auto-Merged Data Selections
School Info	School Info	School Info
NAME The House at Pooh Corner	NAME The House at Pooh Corner	NAME The House at Pooh Corner 🗭
PHONE NUMBER 508-000-0000	PHONE NUMBER	PHONE NUMBER 508-000-0000
PRIMARY ADDRESS 21 Main St, Hudson, MA 01752	ADDRESS	PRIMARY ADDRESS 21 Main St, Hudson, MA 01752
	Use All Existing Data 오	✓ Record Merge Complete Cancel Merge

Siblings: If there is not a possible duplicate you will select the Not a Duplicate Create

New button.

Duplicate Search: Applicant > Household	Current School	> Sibling Duplicates		
Incoming Sibling				
Sibling Info				
NAME Juliette Reynolds				
DOB 12/14/2013	GENDER			
20/21/2020	, contaile			
No Duplicates Found!	11	Not a Duplicate Create New	Not finding what you are looking for?	Q, Advanced Search

**Confirm:** Once all incoming data has been reviewed the confirmation screen will appear (all green panes). The pencil icons are available to correct any information to be written to the student record in Radius.

C. L.
Amilent Information Primary Konsekuld
Applicant Information         Primary Troubled           Applicant Profile         Primary Troubled           Void         Primary Troubled           Sophia Reynolds         C           Sophia Reynolds         C           Ool         C           10/102002 (2'         C           Franke (2'         C           Resource (2)         C           20 Botton Post Read Mariborough, MA 01752 (2')         C
PRIMARY PARENT 2 Working Mile Series Male (2) RULINOSURI TO INSTRUCT (2) Father Father (398) 888-868 0001 (Here IR NARY (777) 777777 (San) (888) 888-868 (Not) (988) 888-868 (Not) (988) 888-868 (Not) (998) 898-868 (Not) (998) 89
201. Borton Post Keal: Mantorough, MA (1):52 (2)

• Select the Confirm button



• **Summary** the final screen will appear (all beige panes) displaying the values that now exist in the database.

	Primary Household
Applicant Profile  Applicant Profile  Applicant Profile  COR  COR  COR  COR  COR  COR  COR  CO	Premary Proceedings PRIMARY PARENT 1 work Marc Colleen Reynolds (2) second Fenale (2) Mathem Host work(1) (2) Mathem Host work(1) Premar (FDMAY) Premar (FDMAY)
L2	PRIMARY PARENT 2 More Mic Senior Systems (2 Resolution of Systems (2 Resolution of Systems (2 Resolution of Systems (2 1500 888 01001 Inner (Resolution (777) 777-7777 Call (888 888 888 (Resol Particul 7500000) Particul 7500000
	201 Boston Post Road Mariborough, MA 01752

• Select the Return to Approvals button





### The following information is transferred from Ravenna.

#### Applicant

- First, middle, last name, suffix
- Preferred name
- Current school
- Current grade
- Gender
- DOB

#### Application

- Radius Org ID for schools same grade two different schools/divisions
- Applying for school and grade
- Admissions year
- Board/Day
- Current Decision
- Apply Grade Override

#### Parents

- First, middle, last name, suffix
- Address P1 and P2, home and work
- Relationships
- Phones
- Emails

#### The following information is NOT transferred from Ravenna.

- Grade Type
- Parent Employer details
- Custom Fields
- Repeating Grade not in Ravenna
- Mid Year Not in Ravenna
- Applying for FA



