

RADIUS

How to Setup and Apply Decisions

Setup Decisions in Radius

All Decisions need to be set up before you can apply a decision to a Prospect. This is a two-step process:

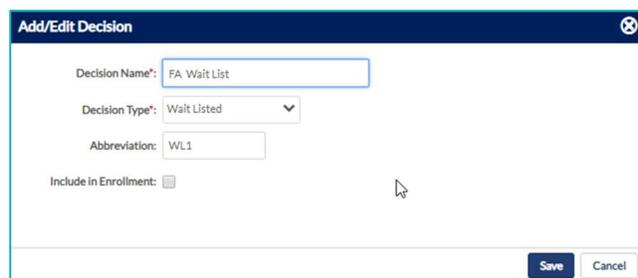
1. Add a decision to the Master Decision list
2. Activate the decision in Enrollment Years

1. Add a Decision to the Master Decision List



- Go to Master Decision List from Enrollment menus:
SETUP | Master Decision List

- Turn the editing Mode to ON
- Select the Add button
 - Enter Decision Name
 - Select Decision Type
 - Enter an Abbreviation
 - Note the check box for **Include in Enrollment**
 - To see a Prospect on the Enrollment search window the record the most recent decision on the record must be one that has **Include in Enrollment** checked.
 - In our example below we do not want to see wait listed students
 - Do not check the Include in Enrollment box
 - Select Save

A screenshot of a web form titled 'Add/Edit Decision'. The form has the following fields:

- Decision Name*: FA Wait List
- Decision Type*: Wait Listed (dropdown menu)
- Abbreviation: WL1
- Include in Enrollment:

At the bottom right of the form are 'Save' and 'Cancel' buttons.

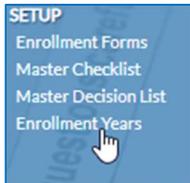
Decision values in Radius must match the Decision values in Ascendance.

The objective of Radius is to process enrollment contracts.

- **Include in ENR** controls the visibility of a name in the Enrollment Search window
- In this example a student with Decision of Declined, FA Wait List or Incomplete will only be visible in the People and Prospects search windows, but not in the Enrollment search window.

Actions	Decision Name	Decision Type	Abbreviation	Usage Count	Include in ENR
	Accepted	Accepted	A	116	<input checked="" type="checkbox"/>
	Declined	Rejected	D	43	<input type="checkbox"/>
	Enrolled	Enrolled	E	76	<input checked="" type="checkbox"/>
	FA Wait List	Wait Listed	WL1	25	<input type="checkbox"/>
	Incomplete	In Progress	I	16	<input type="checkbox"/>

2. Activate the decision in Enrollment Years

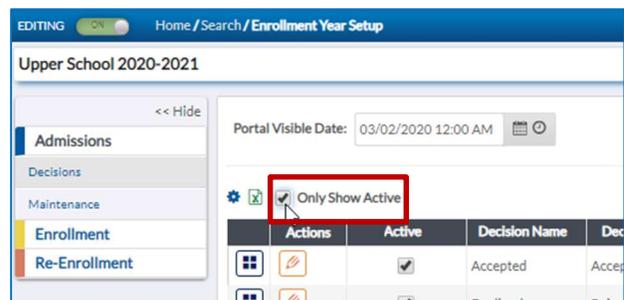


- Go to Enrollment Years:
SETUP | Enrollment Years

- Decisions are set for each division
 - Select your division

Division	Year	ENR Current Y
Upper School	2020-2021	No

- From **Admissions | Decisions** search screen
 - **Deselect** Only Show Active



- Select Active for each decision you want to have available for processing contracts

	Actions	Active	Decision Name	Decision Type	Portal Display Name	Abbreviation	Include in ENR	Portal Visible	Checklist Visible
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Accepted	Accepted	Accepted	A	Yes	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Declined	Rejected	Declined	D	No	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Enrolled	Enrolled	Enrolled	E	Yes	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Incomplete	In Progress	Incomplete	I	No	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	FA Wait List	Wait Listed	Wait List 1	WL1	No	<input type="checkbox"/>	<input type="checkbox"/>

Portable Visible Dates, Portal and Checklist Visible fields do not apply to Radius; a selection here has no impact on contracts.

- For this example, we will activate FA Wait List



- Select Save
- Continue to activate decisions for all divisions.

Apply a Decisions in Radius

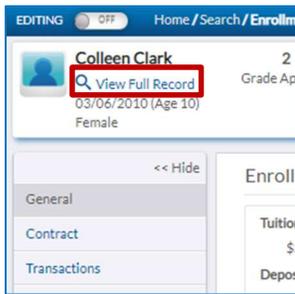
In this example we will delay sending a contract to an accepted student who is waiting on Financial Aid.



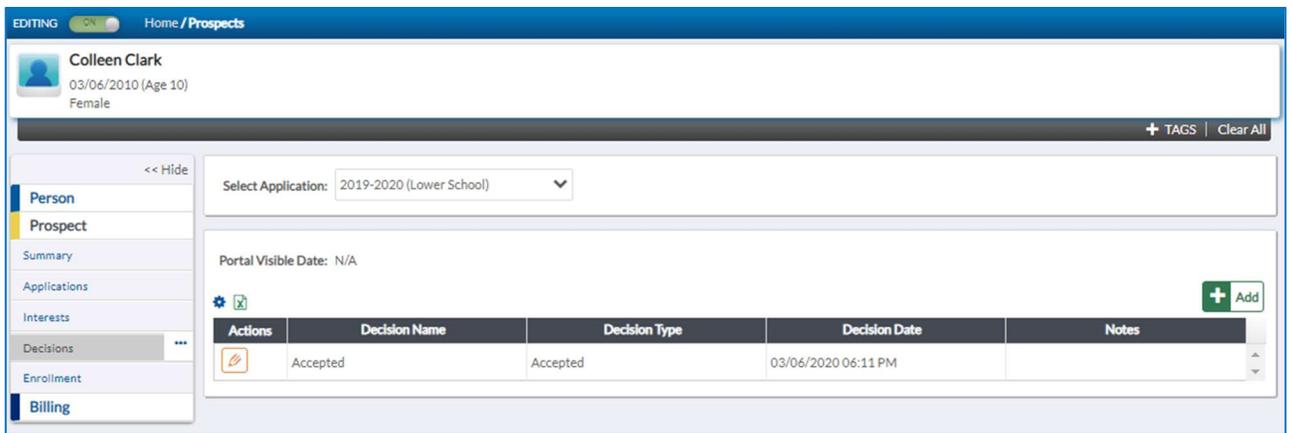
- From Enrollment menus, open Enrollment **ENROLLMENT CENTER | Enrollment**

- Select your Prospect name from the search screen

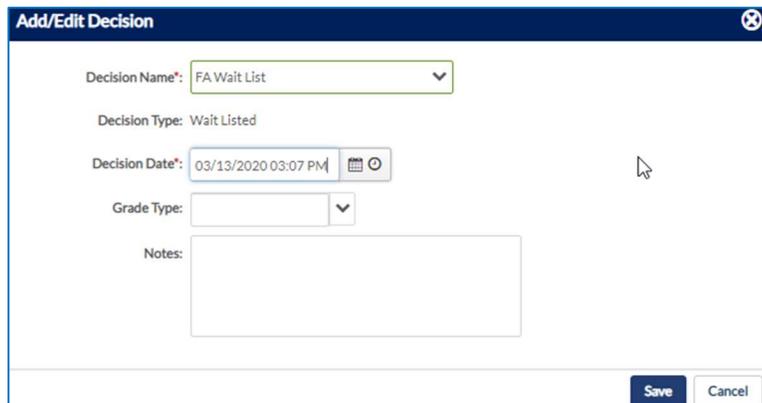
- Select View Full Record (under the Prospect name)



- Select **Prospect | Decisions** menu
- Turn Editing to On
- Select Add button



- Select a Decision Name (FA Wait List) from the drop-down list
 - If you do not see your selection return to step 2 to [Activate a Decision](#)
- Enter a Decision Date; the Decision type will auto populate
- Optional to add Grade Type and notes
- Select Save



- The decision will be added to the decision table

Actions	Decision Name	Decision Type	Decision Date
	FA Wait List	Wait Listed	03/13/2020 03:07 PM
	Accepted	Accepted	03/06/2020 06:11 PM

- Return to Enrollment Search screen and see that our Prospect is no longer visible on search window.
 - FA Wait List was not selected to be Included in ENR

Applying decisions to prospects who are not visible on the Enrollment search screen.

In this example our Prospect has been awarded Financial Aid and is ready for an enrollment contract. The record has a decision of FA Wait List and is not visible on the Enrollment search screen.

To find prospects start from the Enrollment home page open the Prospects

PROSPECTS | Prospects



Select the Prospect Name (blue indicates a hyperlink!)

Prospects Home/Search

Show >>

Quick Search:

Year: Current: 2021-2022

Division: All

Admissions Status: All

Search

User specified filters and search criteria look at **all contact information** (Addresses, Phone Numbers, Email, etc.) but only displays **primary contact information** in the grid.

Assign Tag Add

SEARCH GRID PIVOT TABLE

	Last Name	First Name	Admissions Status	Preferred Name	Middle Name	Suffix	Birthdate	Gender	Email
<input type="checkbox"/>	O'Clair	Ben	FA Wait List	Ben			01/01/2013	Male	

From the Prospect menu

- Select Decisions

The screenshot shows the 'Prospect' menu for Ben O'Clair. The top navigation bar includes 'EDITING ON' and 'Home / Search / Prospects'. The prospect's name 'Ben O'Clair' and birth date '01/01/2013 (Age 8)' are displayed. A 'TAGS' button and 'Clear All' link are visible. The left sidebar contains a menu with 'Person', 'Prospect', 'Summary', 'Applications', 'Interests', 'Decisions', and 'Enrollment'. The 'Decisions' menu item is highlighted. The main content area shows 'Select Application: 2021-2022 (Middle School)' and 'Portal Visible Date: N/A'. A table with columns 'Actions', 'Decision Name', 'Decision Type', 'Decision Date', and 'Notes' is shown. The table contains one entry: 'FA Wait List' with 'Wait Listed' type and '06/02/2021 05:58 PM' date. An 'Add' button is located to the right of the table.

- Turn Editing to On
- Select Add button
- Add a decision of Accepted

The screenshot shows the 'Prospect' menu for Ben O'Clair after adding a decision. The 'Decisions' menu item is highlighted. The main content area shows 'Select Application: 2021-2022 (Middle School)' and 'Portal Visible Date: N/A'. The table now contains two entries: 'Accepted' with 'Accepted' type and '06/02/2021 06:09 PM' date, and 'FA Wait List' with 'Wait Listed' type and '06/02/2021 05:58 PM' date. The 'Add' button is still present.

- Return to Enrollment Center | Enrollment
- The Prospect name will be available for processing a contract