

A large teal chevron graphic pointing to the right, located on the left side of the page.

Add a Ravenna Parent Record to Radius

Parent relationships are required in both Ravenna and Radius

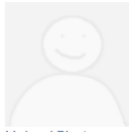
A Parent relationship is one of the fields required to successfully move a record from Ravenna to Radius. If a record is not in Radius (Prospects | Approvals) after you complete the “Send Applicant Admitted” task in Ravenna, please review the required fields associated with the Ravenna record.

A parent is required to enter a relationship in the Ravenna Hub. If a relationship is blank, indicated by the empty set of parentheses, then we know the record was entered manually and the record will not successfully transfer to Radius.

The best practice to ask the parents to complete required information in the Hub. If that is not practical you can remove the details in Ravenna, transfer the record to Radius and then correct the details in both Ravenna and Radius.

The screenshot displays a student profile for Ben 'Ben' O'Clair. The profile includes a photo placeholder, application details (Applying to Grade 4, Application Type, Current Grade 3, Parent-visible AG 4, Application Status complete, Internal Status reading), and a navigation menu (Profile, Reading, Steps & Forms, Notes & Tasks, Engagement, Events, Financial Aid, Decisions). The Biographical Information section shows Name: Ben Ben O'Clair, Gender: M, Birthdate: 2013-01-01, Ethnicity: Decline to answer, Country of Birth: US, Citizenship: US, Languages Spoken at Home: English, and Email: . The Household section shows two entries: Mr. John Garrity (Father) with Email: clupien@senior-systems.com, and Ms. Irene O'Clair with Email: imp@communitybrands.com. A red box highlights the empty relationship field for Ms. Irene O'Clair, with a teal callout box pointing to it stating: "Parent name, relationship and email are required in the Ravenna Hub and to transfer a record to Radius."

★ Ben 'Ben' O'Clair Action ▾

 Upload Photo

Applying to Grade **4**
Application Type
Current Grade **3** Application Status **complete**
Parent-visible AG **4** Internal Status **reading**

Add Tag ▾

Profile | Reading | Steps & Forms | Notes & Tasks | Engagement | Events | Financial Aid | Decisions

Biographical Information [View Original](#)

Name: Ben Ben O'Clair
Gender: M Birthdate: 2013-01-01 Ethnicity: Decline to answer
Country of Birth: US Citizenship: US Languages Spoken at Home: English
Email:
User Account: Colleen Lupien clupien@senior-systems.com Source: Web Search (Web Search)

Household [View Original](#)

Name: Mr. John Garrity (Father)
Email: clupien@senior-systems.com
Phones Cell: Work:
Job Title/Employer (Occupation): Consultant at Self (Technology)

Name: Ms. Irene O'Clair **0**
Email: imp@communitybrands.com
Phones Cell: Work:
Job Title/Employer (Occupation): Producer at WGBH (Media)

Parent name, relationship and email are required in the Ravenna Hub and to transfer a record to Radius.

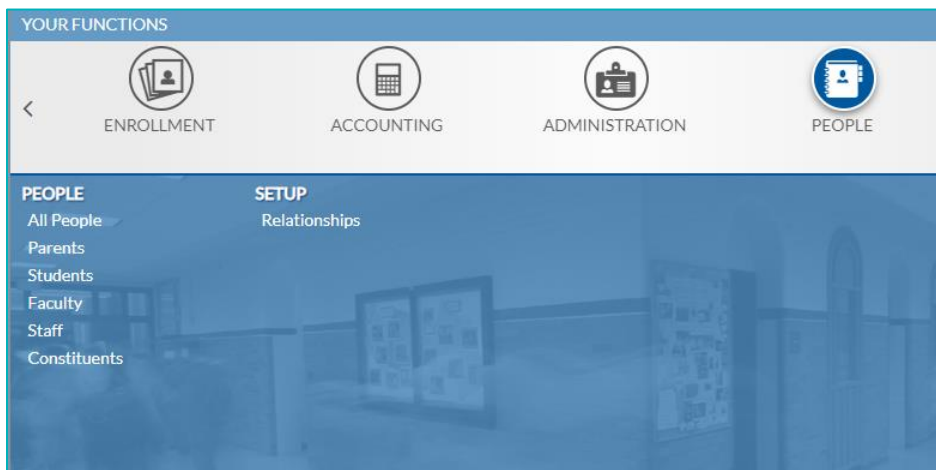
Adding a person record involves multiple steps to properly link the Parent to the Prospect

1. Add a person
2. Add name and email
3. Add employment (optional)
4. Add relationship
5. Connect record to child's Household
6. Add Parent as signatory to child's record
7. Connect record to child's Household

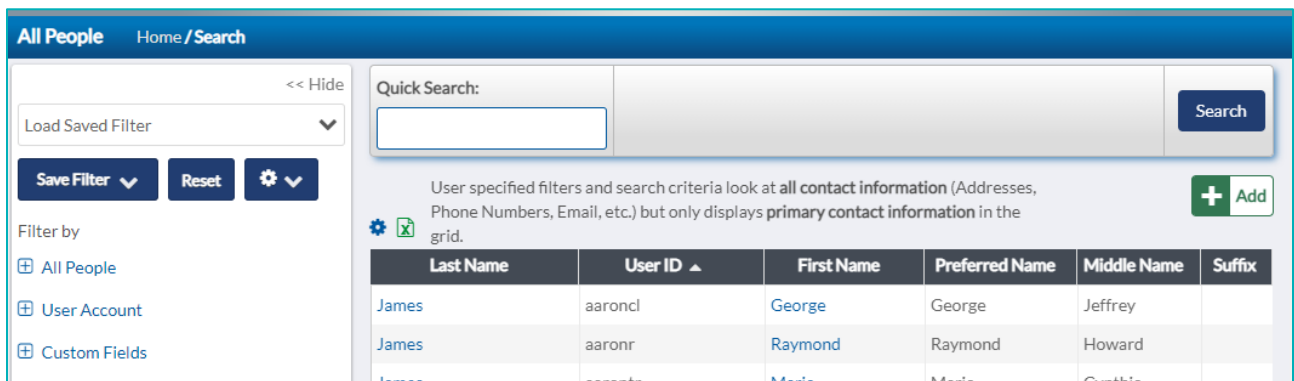
1. Add a Person Record

PEOPLE Menu

- Select **All People**



- Select Add button



- Enter the details for the parent.
- Note the 1 possible duplicate note that pops up
- Use the scroll bar to see list of names

Add New Person

Person Information

Title: Preferred*:

First*: Suffix:

Last*: Maiden:

Middle: Professional Suffix:

1 possible duplicates were found.

Next Finish Cancel

When you scroll down you will see a list of other people with same last name. In this instance we see the child's name. This is not a duplicate person.

- Select Finish

Add New Person

Contact Information

Email:

Phone: ext

1 possible matches were found, if the person you are trying to add is listed below just click to select; if not, continue to enter data on this screen and then click Save.

Name	Email	Phone	Address
Ben O'Clair			200 Boston Post Road, Mar...

Next Finish Cancel

2. Add Name Details

Person | Name

- Complete the details for the parent: name and email are required
- Select Save

The screenshot shows a user profile for Irene O'Clair. The 'Name' section includes fields for Title (Ms.), Preferred (Irene), First (Irene), Suffix, Middle, Maiden, and Last (O'Clair). There are also fields for Phone (US +1, (###)###-####, ext) and Email (imp@communitybrands.com). The 'Salutations' section shows Individual (Ms. Irene O'Clair) and Combined (Ms. Irene O'Clair). The 'Save' button is highlighted.

3. Add Employment Details

Person | Employment (Optional)

- Complete details
- Select Next

The screenshot shows a dialog box titled 'Add Work Information'. It has fields for Company Name (Name: WGBH, Type), Contact Ms. Irene O'Clair at (Title: Producer, Phone), and buttons for Next, Finish, and Cancel.

- Location Name is required
- Select Finish

Add Work Information

Location Address

Location Name*: WGBH Boston Status: Not Verified

Location Type:

Country/Region: United States

Address Line 1: Enter a location

Address Line 2:

Address Line 3:

Zip/Postal Code:

City/Town:

- Select Save

EDITING ON Home / Search / All People

Irene O'Clair

<< Hide

Person

- Name
- Address
- Employment**
- Bio
- Education History
- Connections
- Relationships
- Communications
- Comments
- Media
- Custom Fields
- Roles
- User Account
- Maintenance

Billing

WGBH

Current

Title: Producer

Phone: (###)###-#### ext

Type:

Location: WGBH Boston

Address: Not Verified

United States

4. Add Relationships

Person | Relationships

- a. Roles
 - a. Select Student
 - b. Deselect Other
 - c. Enter child name
 - d. Use scroll bar to see duplicates

- Click on the child's name that will appear in the list

Add New Relationship

Roles

Prospect Student Constituent Parent Faculty Staff

Other

Person Information

Title:

Preferred*:

First*:

Suffix:

Last*:

Maiden:

2 possible duplicates were found.

Middle:

Professional Suffix:

Biography

Contact Information

Email:

Phone:

2 possible matches were found. If the person you are trying to add is listed below just click to select; if not, continue to enter data on this screen and then click Save.

Name	Email	Phone	Address
Ben O'Clair			200 Boston Post Road, Ma...
Ms. Irene O'Clair	imp@communitybrands.c...		

- b. Define Relationships
 - Use the drop-down menu to select the relationship
 - Select Finish

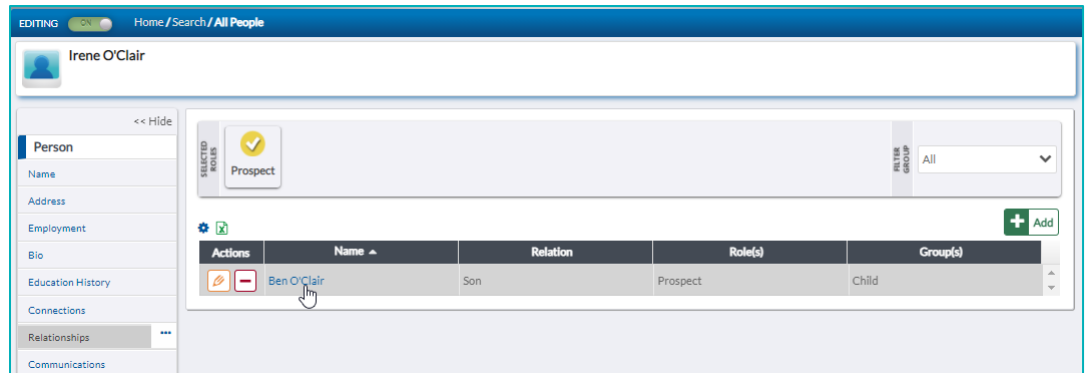
Define Relationship

Ms. Irene O'Clair is the of Ben O'Clair

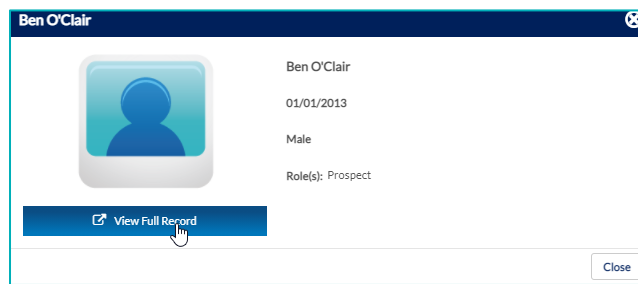
Notes:

5. Connect record to child's Household

- Select the child's name on the relationship tab



- Select View Full Record



- Select Address form the Person menu
 - Turn Editing mode to ON
 - Scroll to bottom of screen



- Select Add Household Member

City/Town:
Marlborough

State/Province:
MA

Relationships in the same household: + Add Household Member

Name	Relation	Role(s)	Primary	Active
Mr. John Garrity	Father	Parent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- From the Add New Person Window
 - Select Parent
 - Deselect Other
 - Add Parent first and last name

Add New Person

Roles

Prospect Student Constituent Parent Faculty Staff

Other

Person Information

Title:

Preferred*:

First*:

Suffix:

Last*:

Maiden:

Professional Suffix:

2 possible duplicates were found.

- Select the parent's name from the possible duplicate list at bottom of window

US +1 (###)###-#### ext

2 possible matches were found, if the person you are trying to add is listed below just click to select; if not, continue to enter data on this screen and then click Save.

Name	Email	Phone	Address
Ben O'Clair			200 Boston Post Road, Ma...
Ms. Irene O'Clair	imp@communitybrands.c...		

- Define the relationships as prompted
- Select Finish

Define Household Relationships

Ms. Irene O'Clair is the: Spouse of Mr. John Garrity

Ms. Irene O'Clair is the: Mother of Ben O'Clair

Finish

6. Assign the parent as a Signatory

From Prospect Record: **Billing | Financial Responsibility**

- Turn editing mode to on
- Select the Add button

Ben O'Clair

Contract Signatories

Actions	Name	Relation	Relationship Group	Notes
	John Garrity	Father	Parent/Guardian	

No Billing Account Exists

- Select the parent's name from the list
- Select Add

Contract Signatories

Please select from the list of relationships for Ben O'Clair

Name	Relation	Relationship Group
<input checked="" type="checkbox"/> Irene O'Clair	Mother	Parent/Guardian

Add **Cancel**

7. Update Roles

- Select the newly added parent name to complete the last step

EDITING OFF Home / All People

Ben O'Clair

<< Hide

Person
Prospect
Billing

Account Summary
Account
Financial Responsibility
Transactions
Debit Account
Pending
Future
Collections

Contract Signatories

Name	Relation	Relationship Group	Notes
John Garrity	Father	Parent/Guardian	
Irene O'Clair	Mother	Parent/Guardian	

No Billing Account Exists

Person | Roles

- Deselect Other
- Select Save

EDITING ON Home / All People

Irene O'Clair

<< Hide

Person

Name
Address
Employment
Bio
Education History
Connections
Relationships
Communications
Comments
Media
Custom Fields
Roles

Role	Role	Description
<input type="checkbox"/>	Constituent	Any person affiliated with your organization may be considered a constituent. This role is designated for those you would like to participate in fund-raising efforts or community networking.
<input type="checkbox"/>	Faculty	A teacher or member of the community that interacts with the students and may need access to attendance, grading and other academic areas cor
<input checked="" type="checkbox"/>	Other	A category to capture contacts and other people who do not fit into any of the other roles. These contacts include referrals, connections, emergen
<input checked="" type="checkbox"/>	Parent	The parent or guardian of a student. This role can be granted access to profile editing, billing and academic data related to their child(ren).
<input type="checkbox"/>	Prospect	A candidate for admission to your school. From prospects to applicants, this role is the focus of the Radius Admission product. Collect and manage applicant related data, checklists and applications, scheduling of interviews and tours, financial aid, enrollment contracts and r
<input type="checkbox"/>	Prospect Par...	The parent or guardian of a candidate for admission to your school. This role can have access to all of the features within Online Admissions, including inquiry and application forms, questionnaires, profile editing and fee payments.
<input type="checkbox"/>	Staff	An employee of the school that may need access to administrative or business-related functions.
<input type="checkbox"/>	Student	A person who is attending your school or other academic program. This role is the focus of the Radius Academic product. Track academic and tuition related data and grant access to online profile editing, student schedule, upcoming and graded homework assignments,

Save Cancel

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