

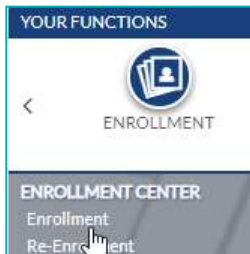


# FAQ: Decisions

- [How to I change a Decision?](#)
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- [Can I remove a name from the Enrollment search screen? I only want to see Prospects who will be issued contracts.](#)
- [Why don't I see the decision I need in drop down menu?](#)
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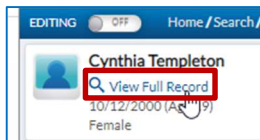
## How do I change a decision?

*In this example our Prospect has declined acceptance, we will change their decision to Declined.*

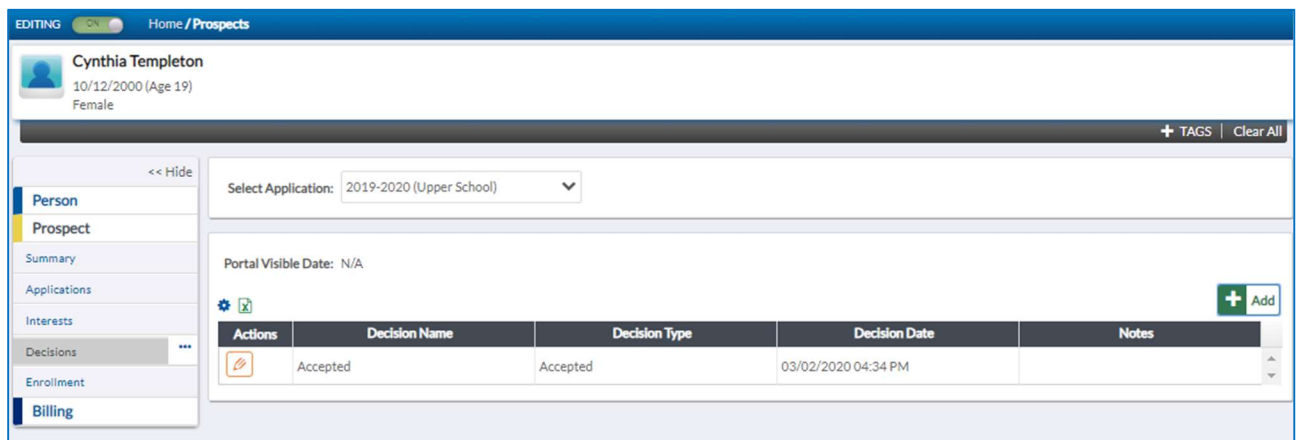


- Go to the Enrollment search screen  
**ENROLLMENT CENTER | Enrollment**

- Select your Prospect name from the search screen
- Select View Full Record (under the Prospect name)



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



- Select a Decision Name, i.e. Declined, from the drop down list
- Enter a Decision Date; the Decision type will auto populate
- Optional:
  - Grade Type
  - Notes
- Select Save

- The decision will be added to the Prospect's record

Select Application: 2019-2020 (Upper School) ▼

Portal Visible Date: N/A

⚙️ X + Add

Actions	Decision Name	Decision Type	Decision Date	Notes
	Declined	Rejected	03/16/2020 02:35 PM	Will not be transferring
	Accepted	Accepted	03/02/2020 04:34 PM	

- Return to Enrollment Search screen and see that the Prospect is no longer visible on search window.
  - The decision of Declined was not selected to be Included in ENR

## Why can't I see a Prospect on the Enrollment search screen?

Only records with decision selection of ***Include in Enrollment*** will be visible in Enrollment search screen.

All Decisions need to be set up before you can apply a decision to a Prospect. This two-step process is discussed in the document *How to Setup and Apply Decisions*.

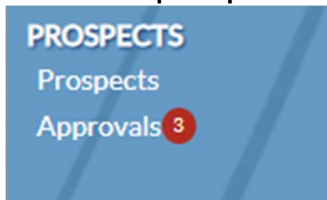
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*In this example our Prospect has been awarded Financial Aid and is ready for an enrollment contract*

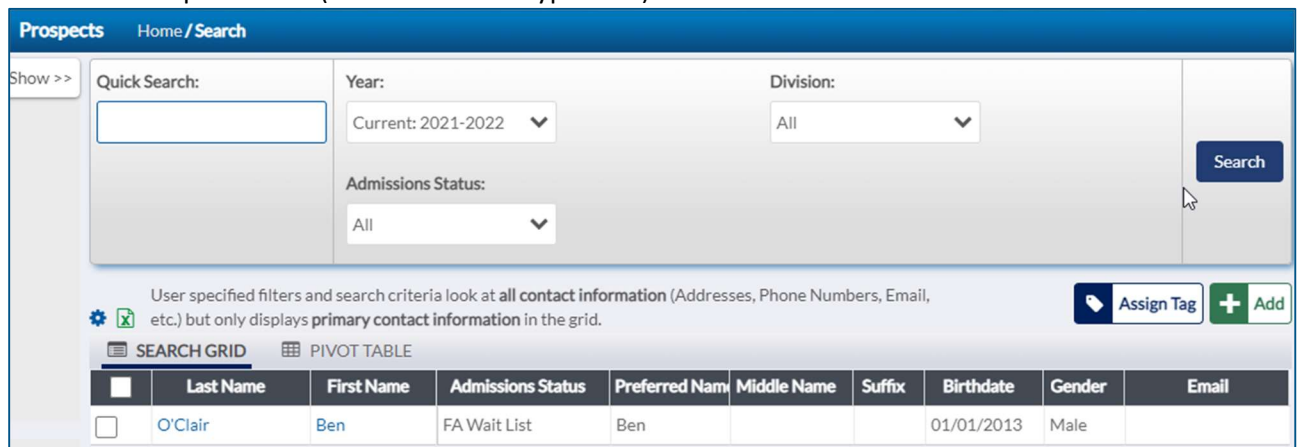
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To find prospects open the Prospects menu.

### PROSPECTS | Prospects



Select the Prospect Name (blue indicates a hyperlink!)

A screenshot of the 'Prospects' search screen. The header shows 'Prospects' and 'Home / Search'. Below the header is a search form with fields for 'Quick Search:', 'Year:' (Current: 2021-2022), 'Division:' (All), and 'Admissions Status:' (All). A 'Search' button is on the right. Below the search form is a message: '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.' There are 'Assign Tag' and 'Add' buttons. Below the message are tabs for 'SEARCH GRID' and 'PIVOT TABLE'. The 'SEARCH GRID' tab is active, showing a table with columns: Last Name, First Name, Admissions Status, Preferred Name, Middle Name, Suffix, Birthdate, Gender, and Email. The first row shows 'O'Clair', 'Ben', 'FA Wait List', 'Ben', and '01/01/2013'.

From the Prospect menu

- Select Decisions

EDITING ☒ Home / Search / Prospects

**Ben O'Clair**  
01/01/2013 (Age 8)  
Male

+ TAGS | Clear All

<< Hide

**Person**

**Prospect**

Summary

Applications

Interests

**Decisions** ...

Enrollment

Select Application: 2021-2022 (Middle School) ▼

Portal Visible Date: N/A

+ Add

Actions	Decision Name	Decision Type	Decision Date	Notes
	FA Wait List	Wait Listed	06/02/2021 05:58 PM	

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

EDITING ☒ Home / Search / Prospects

**Ben O'Clair**  
01/01/2013 (Age 8)  
Male

+ TAGS | Clear All

<< Hide

**Person**

**Prospect**

Summary

Applications

Interests

**Decisions** ...

Enrollment

**Billing**

Select Application: 2021-2022 (Middle School) ▼

Portal Visible Date: N/A

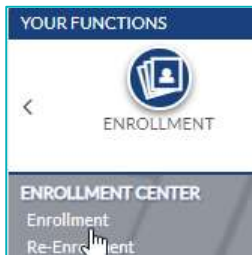
+ Add

Actions	Decision Name	Decision Type	Decision Date	Notes
	Accepted	Accepted	06/02/2021 06:09 PM	
	FA Wait List	Wait Listed	06/02/2021 05:58 PM	

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

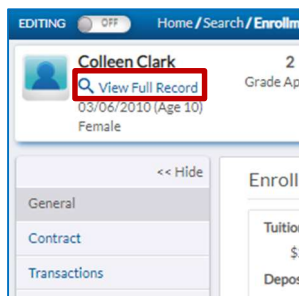
## Can I remove a name from Enrollment search screen? I only want to see Prospects who will be issued contracts.

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

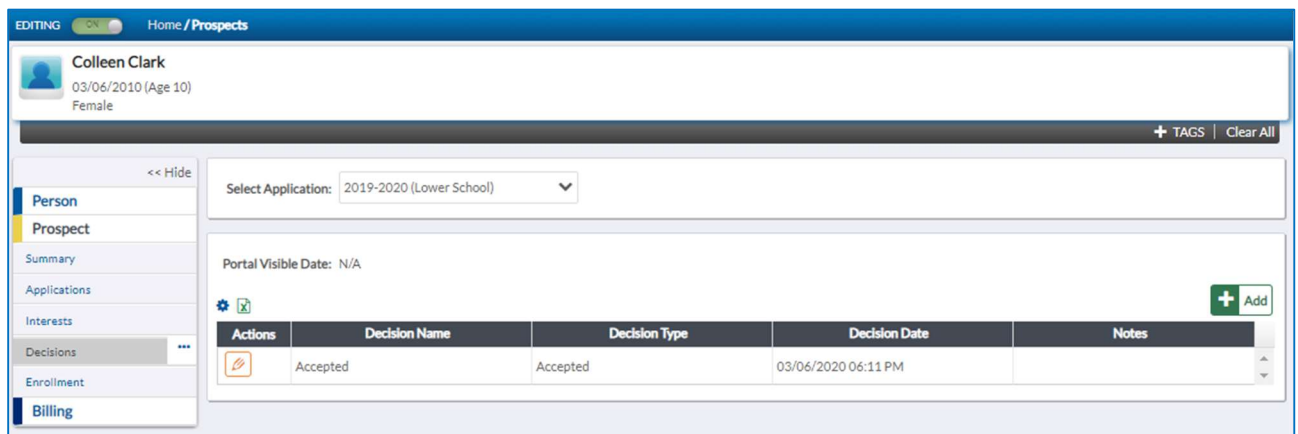


- Go to Enrollment search screen  
**ENROLLMENT CENTER | Enrollment**

- Select your Prospect name from the search screen
  - Select View Full Record (under the Prospect name)



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



- Select a Decision Name (FA Wait List) from the drop-down list
- Enter a Decision Date; the Decision type will auto populate
- Optional to add Grade Type and notes
- Select Save

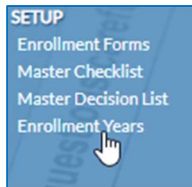
- The decision will be added to the Prospect's record

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 the Prospect is no longer visible on search window because the decision of FA Wait List was not selected to be Included in ENR.

## Why don't I see the decision I need in drop down menu?

When a decision is on Master Decision List but not visible on your decision choices then the decision needs to be activated. Decisions need to be activated for each division.

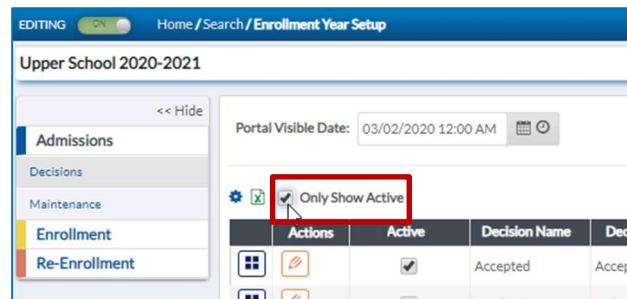


- Go to Enrollment Years menu  
**SETUP | Enrollment Years**

- Decisions are set for each division
  - Select your division(s) if applicable

Division	Year	ENR Current Y
Upper School	2020-2021	No

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



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

Upper School 2020-2021									
Portal Visible Date: 03/02/2020 12:00 AM									
Only Show Active									
Actions	Active	Decision Name	Decision Type	Portal Display Nam	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"/>	Declined	Rejected	Declined	D	No	<input type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	Enrolled	Enrolled	Enrolled	E	Yes	<input type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	Incomplete	In Progress	Incomplete	I	No	<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

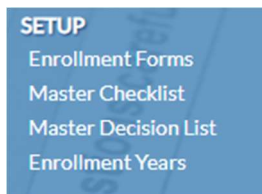


- Select Save
- Continue to activate decisions for all divisions, as needed.
- Return to **Prospect | Decision**
  - Add a decision

## How do I see Prospects who have FA Accepted decision on the search screen?

To see Prospects with a decision of FA Accepted on the search screen the decision must be set to be included in Enrollment.

Got to **SETUP | Master Decision List**



From Master Decision List

- Turn Edit Mode to On
- Select Include in ENR

DITING ON Home / Master Decision List

Master Decision List

⚙️ X + Add

Actions	Decision Name ▲	Decision Type	Abbreviation	Usage Count	Include in ENR
	Accepted	Accepted	A	128	<input checked="" type="checkbox"/>
	Declined	Rejected	D	43	<input type="checkbox"/>
	Enrolled	Enrolled	E	77	<input checked="" type="checkbox"/>
	FA Wait List	Wait Listed	WL1	28	<input checked="" type="checkbox"/>