



Enrollment FAQ

Step 1: Review and Import New Student Application Packet

Main Menu>Admissions>New Students>Find Student and click on the word submitted>Click on Review Application>Click on Review Complete once you have reviewed the information>Click on Start Import>Complete import

Step 2: Change Admissions Status to Offer Sent/ Save Enrollment Responsibility

Main Menu>Admissions>New Students>Find Student and click on the word submitted>Click on update status>Set to Offer Sent or Offer Accepted>Click Update Status>Under the Enrollment Setup box click on the dropdown and choose the parent that is responsible for enrollment (see tips below)

Step 3: Map Student to the Financial System

Brand new families will need to be mapped following these steps:

Main Menu>Billing>Billing Main Menu>Roster Management>Family Mapping>Change the Status to "Admissions">Select all student and use the arrow to move them to the box on the right>Click next and follow steps until complete

New students to an existing family will need a financial term assignment:

Main Menu>Billing>Billing Main Menu>Financial Term Assignment> Change the Status to "Admissions">Select all student and use the arrow to move them to the box on the right>Click next and follow steps until complete

Step 5: Enter Transactions for student

Entering transactions in mass, follow these steps:

In Financial Management click on Payment Activity>Click on Pending>Click on Add Transactions>Choose either open column or selected records (see hub help article for explanation)>Choose student (unless it is a family-based charge)>Choose Charge>Enter information>Click Add Transactions

* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

If entering transactions to an individual agreement, follow these steps: *Transactions must be added in mass before you can add transactions individually. *

In Financial Management click on Roster>Click on Pending>Click on yellow No action by customer in the pie chart (agreement counts)>Click on the agreement number next to the customer name>Click on transactions tab>Click add transactions>Add transaction amount>If you need to add transactions for anything else (lunch, t-shirts, field day, etc.) click on add transactions again and repeat as many times as needed.



* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

If entering transactions using a rate table, follow these steps:

Payment activity>Pending>Click on Add Transactions>Click on Assign Default Rates>Choose the rate table you would like to apply>Select customers>Click on Assign Rate Table>Refresh to see changes made

* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

Step 6: Send Enrollment Email Notification

Main Menu>Admissions>New Students>Click the gear icon>Click on Enrollment Notification>Click on View Recipients>Select to either send to enrollment responsible parent only or both custodial parents in the same household (once the choice is made and an email is sent it is locked in for the admissions year)>Click on Select All (or select the ones you want to send the email to)>Click on Send Email

Step 7: Parent completes enrollment, selects payment plan, and submits the packet for review

Parent will complete this step, and you will be notified once a packet has been submitted

Step 8: Review and import packet

Main Menu>Admissions>New Students>Find Student and click on the word submitted>Click on Review Application>Click on Review Complete once you have reviewed the information>Click on Start Import>Complete import

Returning Student Reenrollment Workflow: Institution First/School First

Step 1a: First Year FACTS Schools Map Returning Students

Main Menu>Billing>Billing Main Menu>Roster Management>Family Mapping> Select all students and use the arrow to move them to the box on the right>Click next and follow steps until complete

Step 1b: 2nd Year FACTS Schools Assign Financial Term Assignment

Main Menu>Billing>Billing Main Menu>Roster Management>Select all student and use the arrow to move them to the box on the right>Click next and follow steps until complete

Step 2: Create reenrollment records

Main Menu>Admissions>Returning Students>Click on the gear icon>Click on Reenrollment Management>Click on Create Reenrollment

Step 3: Block/Withdraw students who you do not want to reenroll



Main Menu>Admissions>Returning Students>Click on box next to the students you wish to block>At the top an update status button will appear, click on it>Change to either blocked or withdrawn>Click on Update Status>Repeat for any other status updates you wish to do

Step 4: Save Enrollment Responsibility

Main Menu > Admissions > Returning Students > Click the gear icon> Click Enrollment Responsibility > Click Save Enrollment Responsibility

Step 5: Enter transactions for the next school year

Entering transactions in mass, follow these steps:

In Financial Management click on Payment Activity>Click on Pending>Click on Add Transactions>Choose either open column or selected records (see hub help article for explanation)>Choose student (unless it is a family-based charge)>Choose Charge>Enter information>Click Add Transactions

* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

If entering transactions to an individual agreement, follow these steps: *Transactions must be added in mass before you can add transactions individually. *

In Financial Management click on Roster>Click on Pending>Click on yellow No action by customer in the pie chart (agreement counts)>Click on the agreement number next to the customer name>Click on transactions tab>Click add transactions>Add transaction amount>If you need to add transactions for anything else (lunch, t-shirts, field day, etc.) click on add transactions again and repeat as many times as needed.

* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

If entering transactions using a rate table, follow these steps:

Payment activity>Pending>Click on Add Transactions>Click on Assign Default Rates>Choose the rate table you would like to apply>Select customers>Click on Assign Rate Table>Refresh to see changes made

* Once all transactions have been added and reviewed you will invite parents to enroll. Agreements will be finalized once the parent chooses their payment plan during enrollment.

Step 6: Send Enrollment Email notification

Main Menu>Admissions>Returning Students>Click the gear icon>Click on Enrollment Notification>Click on View Recipients>Select to either send to enrollment responsible parent only or both custodial parents in the same household (once the choice is made and an email is sent it is locked in for the admissions year)>Click on Select All (or select the ones you want to send the email to)>Click on Send Email



Step 7: Parent completes enrollment and chooses payment plan

Parent will complete this step, and you will be notified once a packet has been submitted

Step 8: Review and Import packet

Main Menu>Admissions>Returning Students>Find Student and click on the word submitted>Click on Review Application>Click on Review Complete once you have reviewed the information>Click on Start Import>Complete import