Get Admissions Started After Onboarding

Purpose	Set up website links or buttons to start admissions for your school after Application and Enrollment onboarding and provide valuable tips to streamline the application process for both new and prospective students.
Related Articles	Admissions Setup Overview of New Student Admissions Tracking Prospective Students

Overview

The school's administrator or webmaster may create accessible links for parents on the school's website, directing them to apply or request more information. Before proceeding, ensure you've completed the FACTS Application & Enrollment onboarding and received confirmation your system configuration is complete.

If you used Admissions last year, see Checklists for Admissions New School Year Procedures.

Public Website Link for Parents

Parents may access your admissions system through a specific URL created for your school. This address allows you to create a link via an admissions page on your school's public website. Once the link is on the Application website, parents may create an account or log into an existing account to submit student applications. Submitted applications display in the **New Students** screen.

- 1. From FACTS SIS, click **=**.
- 2. Click Admissions.
- 3. Click Application & Enrollment.
- 4. Click Application.
- 5. Click Admissions Setup.
- 6. Under Public Website Link for Parents, copy the URL.
- 7. Create a link or button on your school's website.



Schools typically label the link or button Apply Online or Apply Now.

Link to go back to school website

Use the **Link to go back to school website** area to create a link in your application portal to go back to your school's website. The **Link OnClick Event** is a field used to write an event script to communicate with Google Analytics or Google Tag Manager to track events or actions on FACTS hosted pages back to your school's analytics platform.

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- 1. From Admissions Setup, select Admissions Home.
- 2. Under Link to go back to school website, type a Link Title.
- 3. Type your school's website Link URL.
- 4. Type a Link OnClick Event.
- 5. Click Save.



Schools typically label the link or button Back to School Website.

Link directly to the inquiry form

You may also wish to create a direct link or button to the Application & Enrollment inquiry form to allow browsing parents to easily see the option if they are not yet ready to apply. You may also share this link on social media or in other ways to market your school and collect leads. Once the link is on the inquiry form website, parents may submit requests. Submitted inquiries display in the <u>Inquiry queue</u>.

- 1. From Application & Enrollment, click Inquiry.
- 2. Click Setup.
- 3. Copy the URL.
- 4. Create a link or button on your school's website.



Schools typically label the link or button *Request More Information*.

Logos for website buttons

You may use FACTS logos to create your website buttons.

List of logos with file name and description

Description	Logo
FACTS Color logo, blue text Filename: FACTS_Web_Color.png	FACTS

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FACTS White logo, white text Filename: FACTS_Web_White.png	FACTS.
FACTS Black logo, black text Filename: FACTS_Web_Black.png	FACTS
FACTS Color Cap logo Filename: FACTS_LogoCap_Color_400x277.png	
FACTS White Cap logo Filename: FACTS_LogoCap_White_400x277.png	
FACTS Black Cap logo Filename: FACTS_LogoCap_Black_400x277.png	

Save a logo

- 1. Right-click a logo.
- 2. Click Save picture as or Save image as and select a location on your computer.
- 3. Click Save.

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Note

All logos are .PNG format with a transparent background. Table cells are shaded gray to enable users to view logos with white text and graphics.

- Logos with black text are suitable for websites or documents with white or light colored backgrounds.
- Logos with white text are suitable for websites or documents with dark colored backgrounds.

Track Prospective Students

Purpose	Manage prospective student information and interactions, including creating manual inquiry records, updating inquiry statuses, and linking inquiry and application records.
Related Articles	Manage the Inquiry Queue Manage Inquiry Events
Watch a Video	Using FACTS to Manage Prospective Students Q&A Video

Overview

Monitor prospective students using their inquiry record in the Inquiry Queue. Once parents create an inquiry record, you may edit it to ensure the student's interests and contact information are current. Use checklist items and tasks to ensure prospective students are making progress toward applying to your school.

Tip Keeping accurate records ultimately leads to better enrollment outcomes. See <u>Manage the Inquiry</u> <u>Queue</u> to learn about report options.

See **Basic SIS Screen Features and Functions** to learn about options available throughout FACTS SIS.

Create an inquiry record manually

When parents submit requests for information the system automatically creates inquiry records. You only need to create one manually for walk-ins and call-ins, or when adding a sibling to an existing student. Add options to **Other Schools** in **Defined Lists** to customize values in the **Current School** field.

- 1. From FACTS SIS, click **E**.
- 2. Click Admissions.
- 3. Click Application & Enrollment, then click Inquiry.
- 4. Click +.
- 5. Record student and parent information.
- 6. Click Save Form.

Modify an existing inquiry record

Edit an existing record to fix typos, add additional information, and make changes to the grade level or school year.

1. From Application & Enrollment, click Inquiry.

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- 2. Select a student.
- 3. Select the student's name in the **Forms** box.
- 4. Click 🖍.
- 5. Make the desired changes.
- 6. Click Save Form.

Track interactions with prospects

As you respond to requests for information, walk-ins, or interact with prospects, keep track in the student's inquiry record and <u>checklist</u>. <u>Inactivate the student's record</u> if they are no longer a candidate for your school. Only delete accidental duplicates or records that do not represent real data or people.



- Click in the status box to delete the student's inquiry record.
- · Select a task to mark it as complete.
- Click ADD TASK to create a task specific to the student.
- Click in the Tasks area to view completed tasks.
- Click to edit and send the email notification for this prospective student.

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Add siblings to an existing student

Sometimes, parents fail to include all the students they are interested in enrolling when they submit the inquiry form. In this case, you may manually create an inquiry record for each additional sibling.



- 1. From Application & Enrollment, click Inquiry.
- 2. Select a student.
- 3. Click ADD SIBLING INQUIRY.
- 4. Complete Student Information fields for the new inquiry student.
- 5. Click Save Form.

Update a student's inquiry status

The inquiry status reflects the state of an inquiry record for a particular year and should be changed when the student applies or is no longer a viable prospect.

Field	Option	Description	
Status	Active	The student is a viable prospect. You may track checklist items and send emails based on various criteria.	
	Progressed	The original inquiry record progressed to the next school year since the parents did not apply for the year they inquired. After changing the status to Progressed , a new Active Inquiry record will be created in the new school year. Track the student in the new Active inquiry record, rather than the old Progressed record.	
	Inactive	The student is not moving forward through the application process and should not be contacted any longer. This status displays on various reports to keep an accurate number of	

Update Status fields

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Field	Option	Description	
		inquiries to your school.	
	Applicant	The student's parent or guardian has started or submitted an application. Tie the Inquiry record to the Application for data integrity and reporting.	
Substatus	Configure options in <u>Defined List</u>	Provides additional details about the new student. For example, whether they are a legacy child, out of state, or a sibling of a current student. You may assign one inquiry substatus per student.	
Campus Visit	Ē	Select a date to record a student's visit to your school.	

- 1. From Application & Enrollment, click Inquiry.
- 2. Select a student.
- 3. Click Update Status.
- 4. Select inquiry status options.
- 5. Click Update Status.

Link inquiries with applicants

The system automatically attempts to link inquiry records to application records once parents submit the application by looking for matching school year, grade level, student name or email, and parent name or email. If you receive an Inquiry link error or see duplicate student entries in **New Students** you may need to manually match inquiry records to their application. The **Applicant** drop-down displays with applicants of the same grade level and school year as the selected inquiry record.

Can't find your applicant when trying to link?

As in the examples below, the **Grade Level** or **School Year** in the inquiry record may not match the ones listed in the application, causing an <u>inquiry link error</u>.

- A family submitted an inquiry for 2023-2024, but then decided to keep their student in public school for another year, and instead applied for 2024-2025. In this case, the year and grade level for the inquiry record is correct. Update the 2023-2024 inquiry record status to <u>Progressed</u> and link the new 2024-2025 inquiry record to the application.
- A family mistakenly submitted an inquiry for 2025-2026, and then created an application for the 2024-2025 school year. Edit the existing inquiry record to change the year, save the record, and then link it to the 2024-2025 applicant.

1. From Application & Enrollment, click Inquiry.

- 2. Click a student's name.
- 3. Click Update Status.
- 4. Select a **Status** of **Applicant**.
- 5. Select the applicant.
- 6. Click Update Status.

Process Submitted New Student Application Packets

Purpose	Learn how to process new student Application packets in FACTS Application and Enrollment.
Related Articles	<u>Track Prospective Students</u> <u>Manage the Admissions Record</u> <u>Process Submitted New Student Enrollment Packets</u>
Watch a Video	Sync and Import into FACTS SIS How-To Video Process Submitted New Student Applications How-To Video Send Enrollment Notifications and Reminders How-To Video

Overview

Applicants are processed in the **New Students** screen, your dashboard for viewing applications and tracking application requirements. Check it regularly to keep up with your workflow, or wait until prompted by a <u>notification</u> <u>email</u>.

While the instructions below assume you will process each student from beginning to end, you may stop after completing any section. The **New Students** screen displays the status of each Application packet and allows you to pick up where you left off with each one. A history of status changes displays in <u>the Application record</u>.

	Access outstanding enrollment steps	Clear filters/so	Sele orts	ct column filters	Acce	ess and s records I	Select a school year I
	New Students 🔅	± + <i>X</i>					2019-2020 👻
Sort by column	Student Name 🛧	Grade So	shool T	Admissions Status	Inquiry	Application	Enrollment
	Adams, Jane	09 Hi	gh School			In Progress	
	Beck, Christopher	01 Ele	mentary School	Finished		Import Completed	Import Completed
	Doe, Jimmy	K Ele	mentary School	Offer Sent	Online Applicant	Import Completed	In Progress

Features and Icons

- Click X to clear all sorts and filters from the screen.
- Click To assign Enrollment responsibility and send email notifications.
- Click a column header to sort. By default, the sort order is descending; click again to sort ascending.
- Select an Admissions Status or Application status to access the Admissions Record.
- Select a school year to filter the applications displayed.

Application statuses

The applicant record displays the current status and suggests next steps. The table below explains all of the

statuses.	1		
Application Status	What does it mean?	What should I do?	
Inactive	The parent started the Application, but has become unresponsive.	N/A	
Submitted	The parent has submitted the application.	Review, sync, and import the application. Track other requirements on your application checklist.	
In Progress	The parent has started the Application, but has not submitted it.	Did the parents change their minds, or do they just need more time? You may want to contact them. Inactive the packet if they do not respond.	
Returned to Parent	A staff member has returned the Application to the parent for them to make edits.	Ensure communication has been sent to the parent about what needs to be changed, and encourage the parent to complete and submit the packet again.	
Edited by School	A staff member has edited the Application, but didn't review, sync and import.	Review, sync, and import the Application. Track other requirements on your checklist.	
Reviewed	A staff member has reviewed the Application for accuracy, but didn't sync and import.	If all requirements are complete, sync and import the Application.	
Import Setup Saved	A staff member has saved progress in syncing for import, but didn't complete the import.	Complete syncing and import the Application.	
Completed	Application data has been imported.	Change the admissions status to Offer Sent or Offer Accepted and send the enrollment invitation email to let the parent know they may begin ther Enrollment packet.	

See **Basic SIS Screen Features and Functions** to learn about options available throughout FACTS SIS.

Review an Application and track requirements

Records display in the **Application** column with a status of **In Progress** after parents have started, and you may begin processing after they have been submitted. The name of the submitting parent displays in the record. As you review the Application, look to make sure all questions are answered fully and all required documents are attached.

- 1. From **FACTS SIS**, click **E**.
- 2. Click Admissions, then click New Students.
- 3. Click a **Submitted** record then click **REVIEW APPLICATION**.

- 4. Review the Application packet.
- 5. Click Review Complete.

When the information provided is inadequate

Often parents fail to provide as much information as you would like. If parents have not sufficiently answered a question, return the Application packet to the parent. In other cases, the Application packet has a minor error. For example, a previous school name typed incorrectly. If it's important to you to have consistent data to export, you may edit the Application yourself.

Return to Parent

Parents do not have to pay the application fee again. Any referral emails are resent each time.

- 1. From New Students, select a Reviewed record.
- 2. Click **RETURN TO PARENT**.
- 3. Type an email to the parents informing them that the Application must be amended and submitted again.
- 4. Click Return to Parent.

The Application record displays **Returned to Parent** to show that the Application packet was sent back to the parent to make edits.

School Edit

- 1. From **New Students**, select a **Reviewed** record.
- 2. Under Forms, click SCHOOL EDIT.
- 3. Click Edit Application to log in as the parent.
- 4. Click Edit next to the Application.
- 5. Make changes.
- 6. Click Submit & Change Status to School Edit.

The Application record displays Edited by School to show that the Application packet was edited by a staff member.

Sync and import an application

The synchronization step allows you to connect the applicant to parents that have previously enrolled a student via Application & Enrollment. This allows the system to tie all records together to prevent data duplication. If the applicant's family is new to your school, import the applicant without selecting a family to sync to. Importing an application creates an <u>admissions record</u> which allows you to select statuses that help you track your admissions pipeline. <u>Inactivate an application</u> if you decide not to import it.

- 1. From **New Students**, select a record that is ready for import.
- 2. Click START IMPORT.
- 3. Select a FACTS SIS household.
- 4. Select a FACTS SIS student (if the student is already in the system), and select parents.
- 5. Click Complete Application, then click Yes.

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Note

After parents finish the Application packet, many schools require parents to provide other information, such as report cards or transcripts. As parents provide those items, mark them off and <u>add any</u> <u>needed notes to the Application checklist</u>. You may also use the checklist to track to-do items for school staff members.

Change admissions status

After importing an application, an <u>Admissions Record</u> is automatically created with the default status of **Submitted**, which informs you that there are still outstanding requirements before parents may enroll. To move the student on to Enrollment, change their Admissions status to **Offer Sent** or **Offer Accepted**.

Admissions status allows you to categorize students for reporting. It describes the state of the admissions record for that particular year, and should be changed as the circumstances change.

Admission status

Note: Statuses are har	d-coded and cannot be changed.

Admission Status	Definition	Function
App Submitted	The parent has started the admissions process at the school by submitting an application.	Parents continue logging into their Application account to view published checklist items. They cannot begin Enrollment yet.
Wait List	The student would be accepted by the school, but there are no positions available in their grade level.	Temporary status.
Withdrawn	The parent has stopped the admissions process and does not plan to continue.	Ending status.
Rejected	The school has declined admission.	Ending status.
Offer Sent	The student has been accepted and the school is waiting for parent confirmation. Typically, a financial commitment is required. This may be submitted with the enrollment packet.	Application Supplemental Application Forms screen displays for parents. Enables Enrollment for parents to start their packet.
Offer Accepted	The parent has accepted the offer and now needs to complete the Enrollment portion of the admissions process.	Application Supplemental Application Forms screen displays for parents. Enables Enrollment for parents to start the packet.
Offer Declined	The parent has chosen to send the student elsewhere.	Ending status. Application Supplemental Application Forms

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Admission Status	Definition	Function
		screen and Closes Enrollment access.
Finished	All Admissions steps have been completed, and the student may be enrolled.	Ending Admissions status. The system prompts you to mark the student's system status as Enrolled . (If the student is applying for next year, the current system status is Pre-Enrolled .)

- 1. From FACTS SIS, click **E**.
- 2. Click Admissions, then click New Students.
- 3. Click a student record under the Admissions Status column.
- 4. Click UPDATE STATUS.
- 5. Select an Admissions Status, then click Update Status.

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Note

If you have configured <u>automated emails for Admissions status changes</u>, you may edit and send an email after changing the status.

Save Enrollment responsibility

Once the student is ready for enrollment, assign the parent responsible for completing the enrollment process. The New

Students screen displays a green notification when this task is outstanding for any student. **Enrollment Setup** displays the number of students with a status of **Offer Sent** or **Offer Accepted** who need Enrollment Responsibility saved. Parent names in red indicate they have not yet created a **Family Portal** username.

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Note

Enrollment responsibility assigns by default to the <u>Custodial mother</u> living at the same address as the student. If there is no Custodial mother, the Custodial father living at the same address becomes the second default.

- 1. From New Students, click ² to display Enrollment Setup.
- 2. Click Enrollment Responsibility.
- 3. Select the School and Year you are accepting students.

- 4. Select the correct Enrollment Responsible Parent for each student.
- 5. Click Save Enrollment Responsibility.

Invite parents to enroll

Now that the system is prepared for the student's enrollment to begin, invite the parents to log in and start their Enrollment packet. The invitation includes all the instructions parents need, including creating their Family Portal account. See <u>Compose Enrollment Invitation Emails</u> to learn more about this communication. You may only send the initial invitation email once. If you need to resend the email, copy text from the <u>invitation email template</u> and send it from the <u>Enrollment Queue</u>.



Important

You may select to send the Enrollment notification email to the **Enrollment Responsible Parent** or **Both Custodial Parents Within the Same Family**. Once you send the first email invitation, you cannot change your **Send To** selection until the next Enrollment year.

- 1. From New Students, click To display Enrollment Setup.
- 2. Click Enrollment Notification.
- 3. Select a School and School Year.
- 4. Select the Enrollment Type of New Student.
- 5. Click View Recipients.
- Select desired recipients. OR Click Select All.
- 7. Click Send Email.



- Click Preview Email to see what the emails look like and ensure variables display correctly.
- Type your email address and click **Test Email** to send a copy of the email for each selected student to your email address.

Send reminder emails to complete Enrollment

If some parents have started but not submitted their enrollment packets, you may send a reminder email from **Enrollment**. Each time you choose to send a reminder, the system only sends emails to parents who have not submitted as of that moment, so you don't have to worry about parents receiving unnecessary emails.

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Tip Send automatic email reminders using <u>Email Series Manager</u>.

- 1. From Application & Enrollment, click Enrollment.
- 2. Click Email Notification.
- 3. Select a School and School Year.
- 4. Select the Enrollment Type of Unfinished New Student.
- 5. Click View Recipients.
- 6. Select desired recipients.
- 7. Click Send Email.

Process Submitted New Student Enrollment Packets

Purpose	Learn how to process new student enrollment packets in FACTS Application and Enrollment.
Related Articles	Process Submitted Student Applications Manage Admissions Access and Records
Watch a Video	Sync and Import into FACTS SIS How- To Video Video Series: Troubleshoot Enrolling Students Not Displaying in Family Portal

Overview

You may process Enrollment packets for new students in the **New Students** screen, your dashboard for viewing applications and tracking application requirements. Review **New Students** regularly to keep up with your workflow, or wait until prompted by a <u>notification email</u>.

While these instructions assume you will process each student's Enrollment packet from beginning to end, you may stop after completing any section. The **New Students** screen displays the status of each Enrollment packet and allows you to pick up where you left off with each one. A history of status changes displays in <u>the Enrollment record</u>.

See **Basic SIS Screen Features and Functions** to learn about options available throughout FACTS SIS.



Features and Icons

- Click X to clear all sorts and filters from the screen.
- Click **Click** to assign Enrollment responsibility and send email notifications.
- · Click a column header to sort. By default, the sort order is descending; click again to sort ascending.
- Select an Admissions Status or Enrollment status to access the Admissions Record.
- Select a school year to filter the students displayed.

Enrollment statuses

The Admissions record displays the current status and suggests next steps.

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Packet Status	What does it mean?	What should I do?
Inactive	The parent started the Enrollment packet but has become unresponsive.	N/A
Submitted	The parent submitted the Enrollment packet.	Review, sync, and import the Enrollment packet. <u>Track other requirements on your</u> <u>Enrollment checklist.</u>
In Progress	The parent has started the Enrollment packet but has not submitted it.	Did the parent change their mind, or do they just need more time? You may want to contact them. <u>Inactivate the packet</u> if they do not respond.
Returned to Parent	A staff member returned the Enrollment packet to the parent for them to make edits.	Ensure the parent has been informed about what changes they need to make, and <u>encourage the parent to complete and submit the packet</u> again.
Edited by School	A staff member edited the Enrollment packet but did not review, sync, and import.	Review, sync, and import the Enrollment packet. <u>Track other requirements on your checklist.</u>
Reviewed	A staff member reviewed the Enrollment packet for accuracy but didn't sync and import.	If all requirements are complete, sync and import the Enrollment packet.
Import Setup Saved	A staff member saved progress in syncing for import but didn't complete the import.	Complete syncing and import the Enrollment packet.
Completed	Enrollment packet data has been imported.	Change the Admissions status to Finished. The student has completed the Enrollment process.

Review an Enrollment packet and track requirements

Records display in the **Enrollment** column with a status of **In Progress** after parents have started their packet. You may begin processing after the status changes to **Submitted**. The name of the submitting parent displays in the record. As you review the Enrollment packet, ensure all questions are answered fully and all required documents are attached.

- 1. From **FACTS SIS**, click **E**.
- 2. Click Admissions, then click New Students.
- 3. Click a Submitted record, then click REVIEW ENROLLMENT.
- 4. Review the Enrollment packet.

5. Click Review Complete.

When the packet information is inadequate

If parents have not sufficiently answered a question, return the Enrollment packet to the parent. In other cases, the Enrollment packet may have a minor error. For example, a typo in a previous school name. You may edit the Enrollment packet yourself to maintain consistent data before importing.

Return to Parent

Parents do not have to pay the submission fee again.

- 1. From New Students, select a Reviewed record.
- 2. Click RETURN TO PARENT.
- 3. Type an email to the parents informing them to amend and submit the Enrollment packet again.
- 4. Click Return to Parent.

The Enrollment record displays **Returned to Parent** to show the Enrollment packet was sent back to the parent to make edits.

School Edit

In some cases, you may decide to record the information yourself instead of returning the packet to the parent.

- 1. From New Students, select a Reviewed record.
- 2. Under Forms, click SCHOOL EDIT.
- 3. Click Edit Enrollment to log in as the parent.
- 4. Click Edit next to the packet.
- 5. Make changes.
- 6. Click Submit & Change Status to School Edit.

The Enrollment record displays Edited by School to show the Enrollment packet was edited by a staff member.



Note

- After reviewing an Enrollment packet you may continue to <u>track Application and</u> <u>Enrollment Checklist Requirements</u>.
- To learn how to remind parents to submit Enrollment packets, see <u>Send Enrollment Reminder</u> <u>Emails to New Student Parents</u>.

Sync and import an Enrollment packet

The synchronization step allows you to connect the information from the Enrollment packet to the family created when the student's Application was imported. This allows the system to tie all records together to prevent data duplication. <u>Inactivate an Enrollmentpacket</u> if you decide not to import it.

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- 1. From New Students, select a record ready for import.
- 2. Click START IMPORT.
- 3. Select a FACTS SIS household.
- 4. Select a Student, Parents, and Grandparents if they are already in the system.
- 5. Click Import into Enrollment, then click Yes.

Next steps for enrolled students

Based on <u>packet settings</u>, both the student's Admissions status and system status may automatically change when the parent submits their Enrollment packet. If this is not true for your packets, <u>manually change the student's admission</u> <u>status</u> to **Finished** and <u>system status</u> to **Enrolled** or **Pre-Enrolled**, depending on the school year.

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Note

Once a student has an **Enrolled status**, there are a few steps to ensure they are ready to start school.

- Enroll in <u>classes</u>.
- Manage the family's Family Portal access.
- Manage the family's Financial Responsibility settings.

Manage Admissions Access and Records

Purpose	Manage application access, disable outdated years, and address duplicate records for new students to close the admissions season and prepare for next year in FACTS Application and Enrollment.
Related Articles	Manage Application Parent Accounts Process Submitted New Student Enrollment Packets Checklists for Admissions New School Year Procedures
Watch a Video	Inactivate Application and Enrollment Packets How-To Video No More Forms Home in Backpacks Q&A Video

Overview

Managing Admissions settings allows schools to ensure their system accurately reflects open application periods and prevents errors such as parents applying for the wrong school year. Once all students are enrolled, schools should disable outdated application years and ensure only the desired years remain available. This process includes disabling parent access to application accounts during off-season periods and addressing duplicate or incorrect application records to maintain accurate reporting.

See **Basic SIS Screen Features and Functions** to learn about options available throughout FACTS SIS.

End the admissions year

Once all students are enrolled, ensure the system only allows applications for the specific school years offered, and errors are avoided, such as parents applying for the wrong school year. For example, if you want to accept applications for 2024-2025 and 2025-2026, but not 2023-2024, then you must disable 2023-2024.

For step-by-step instructions for changing Application and packet settings, see <u>Copy and Control Application &</u> <u>Enrollment Packets</u>.

Additionally, if your school only offers Admissions during a specific part of the year, you should disable the system during the time period you are not accepting new applications.

- 1. From FACTS SIS, click **E**.
- 2. Click Admissions.
- 3. Click Application & Enrollment, then click Application.
- 4. Click Admissions Setup, then select the Additional Settings tab.
- 5. Under Parent Access Status, select Disabled.
- 6. Type a message to display for parents who try to create or log in to an Application account.
- 7. Click Save.

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Note

Though rare, you may also disable the Inquiry form.

Inactivate Application and Enrollment packets

In sporadic cases, parents may create duplicate Applications or duplicate Enrollment packets may exist in the Enrollment queue, which makes Admissions reports inaccurate. When this occurs, you may inactivate the Application or Enrollment packet. Schools using secondary Enrollment packets may also want to inactivate records listed under **Secondary Enrollment**.

Use this checklist to determine if and how an Application should be deleted or inactivated.

Note Checked items are retained online for a user logged into the same computer using the same browser. The Reset button clears all checklists on the page.

Delete or inactivate an Application checklist

1. Verify that the Application should be removed.

The Application was created by mistake.

The parent started a new Application for the same student.

The parent submitted a duplicate Application for the same student.

The Application was created by school staff as a test.

2. Determine if an Application should be deleted or inactivated.

Delete an Application if the parent has not submitted it. See Manage Parent Application Accounts.

Inactivate an Application if the parent has already submitted it. See <u>Completing New Student</u> Admissions.



Important

Do not delete applications unnecessarily. For example, do not delete an application because the parent decided not to continue the application process since the incomplete application contributes to the total number of applicants for the year in Admissions reports.

- 1. From Admissions, click New Students.
- 2. Under the Application column, click the status of the record you wish to inactivate.
- 3. Click , then click Inactivate Application.
- 4. Click Inactive Application to confirm.
- 5. Click New Students.
- 6. Under the Enrollment column, click the status of the record you wish to inactivate.
- 7. Click , then click Inactivate Enrollment.
- 8. Click Inactivate Enrollment to confirm.

Link Inquiry to applicants

Clean up Inquiry records by linking inquiries to applicants or inactivating records. See <u>Tracking Prospective Students</u> to learn about inactivating records and <u>linking Inquiry with applicants</u>.