Overview of FACTS SIS Admissions and Enrollment Procedures

Overview:

The new FACTS SIS (Student Information System) platform will offer robust tools and options for schools to use to manage the enrollment process. Between resources provided on the ADW Principals Page and FACTS HubHelp, users can find a range of documents and videos that cover tasks from initial setup and managing prospective students to processing applications, handling enrollment packets, and concluding the admissions year.

Staff in charge of enrollment need to be able to master the following

1. **Managing Prospective Students (Inquiry Process):**

   - **Creating Inquiry Records:** Manual creation for walk-ins, call-ins, or siblings. Automated creation when parents submit online requests.

   - **Tracking Interactions:** Logging interactions with prospective students within their inquiry record and checklist.

   - **Updating Inquiry Status:** Reflecting the student's progress (Active, Progressed, Inactive, Applicant). "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."

   - **Linking Inquiries and Applications:** Connecting inquiry records to application records for data integrity and reporting.

   - **Direct link to inquiry form** Schools can create a direct link to the Application & Enrollment inquiry form to allow browsing parents to easily see the option if they are not yet ready to apply. "Schools typically label the link or button Request More Information."

2. **Processing New Student Applications:**

   - **Reviewing Applications:** Ensuring completeness and accuracy of application packets. The New Students screen displays the status of each application packet.

   - **Application Statuses:***Inactive:* The parent started the Application, but has become unresponsive.

   - *Submitted:* The parent has submitted the application.

   - *In Progress:* The parent has started the Application, but has not submitted it.

   - *Returned to Parent:* A staff member has returned the Application to the parent for them to make edits.

   - *Edited by School:* A staff member has edited the Application, but didn't review, sync and import.

- *Reviewed:* A staff member has reviewed the Application for accuracy, but didn't sync and import.

- *Import Setup Saved:* A staff member has saved progress in syncing for import, but didn't complete the import.

- *Completed:* Application data has been imported.

3. **Returning Applications:** Sending applications back to parents for corrections or further information. "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."

4. **School Edits:** Making direct edits to the application data by logging in as the parent.

5. **Syncing and Importing Applications:** Connecting applicants to existing families within FACTS SIS to prevent data duplication. "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."

6. **Changing Admissions Status:** Updating the student's admission status (e.g., Offer Sent, Offer Accepted, Withdrawn, Rejected, Finished).

7. **Saving Enrollment Responsibility:** Assigning a parent responsible for completing the enrollment process.

8. **Inviting Parents to Enroll:** Sending email notifications with instructions to begin the enrollment packet.

Financial Management:

1. **Mapping Students to the Financial System:** Mapping brand new families and assigning financial terms to new students of existing families.

2. **Entering Transactions:** Adding charges for tuition, fees, etc., either in mass, individually, or using rate tables.