

A&E Toolkit



*As always, please feel to reach out for any assistance you may need with admissions or anything else regarding our system.
We are pleased to assist you and your school. Please call: 866.800.6593*



A&E Overview



[More Parent vs Admin Admissions Process Perspectives Flow Charts](#)



ENROLLMENT

[Understanding the Enrollment Queue](#)

[Process Submitted New Student Enrollment Packets](#)

[Compose Enrollment Invitation Emails](#)

[Overview of Returning Student Reenrollment](#)

[Inviting Parents to Reenrollment](#)
Family Portal account required.

[Managing Returning Students in the Queue](#)

[Send Reenrollment Reminder Emails to Parents](#)



APPLICATION

[Getting Admissions Started After Implementation](#)

[Overview of New Student Admissions](#)

[Understanding the Application Queue](#)

[Process Submitted New Student Applications](#)

[Manage New Student Family Information](#)

[Track Application and Enrollment Checklist Items](#)



INQUIRY

[Understanding the Inquiry Queue](#)

Access prospective new student records

[Tracking Prospective Students](#)

[Manage Inquiry Events](#)

Great for open houses & tours!



New Students



OVERVIEW

- **Application** is for **new students**.
- New students must complete an **Application** packet **PRIOR** to completing an **Enrollment** packet.
- Applicants are processed in the **New Students** screen.
- The **New Students** screen displays the status of each inquiry, application and enrollment. *This allows you to pick up where you left off with each one. A history of status changes will display in the application record.*
- The New Students **dashboard** is for tracking where your applicants are in the admissions process. *Refer to this dashboard **regularly** to keep up with your workflow.*

PROCESS

- ✓ [Review the APPLICATION packet & track requirements](#)
- ✓ [Importing](#)
- ✓ [Importing Decision Tree](#)
- ✓ [Invite parents to enroll](#)
- ✓ [Review the ENROLLMENT packet & track requirements](#)
- ✓ [Import the ENROLLMENT packet](#)
- ✓ [Next Steps](#)

The screenshot shows the 'New Students' dashboard interface. At the top, a navigation bar includes 'Dashboard', 'Application & Enrollment', 'New Students' (highlighted), 'Returning Students', 'Reports', and 'Search'. On the right, a dropdown menu for 'Select the school year' shows '2023-2024'. Below the navigation bar, the main content area is titled 'New Students' and contains several icons: a gear (labeled 'Access outstanding enrollment steps'), a download icon, a plus icon, and a filter icon (labeled 'Clear filters/sorts'). Below these icons, there are columns for 'Student', 'Grade', 'School', 'Admissions Status', 'Inquiry', 'Application', and 'Enrollment'. The 'Student' column has an upward arrow icon (labeled 'Sort by column'). The 'School' column has a filter icon (labeled 'Select column filters'). The 'Admissions Status', 'Inquiry', 'Application', and 'Enrollment' columns are grouped under the label 'Access and process student records'. On the right side of the dashboard, there is a section for 'Secondary Enrollment' with the text 'Will populate only if exists for the student'.


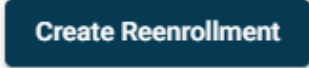


Returning Students



PROCESS

*Check to make sure grade levels are correct before creating the reenrollment records.

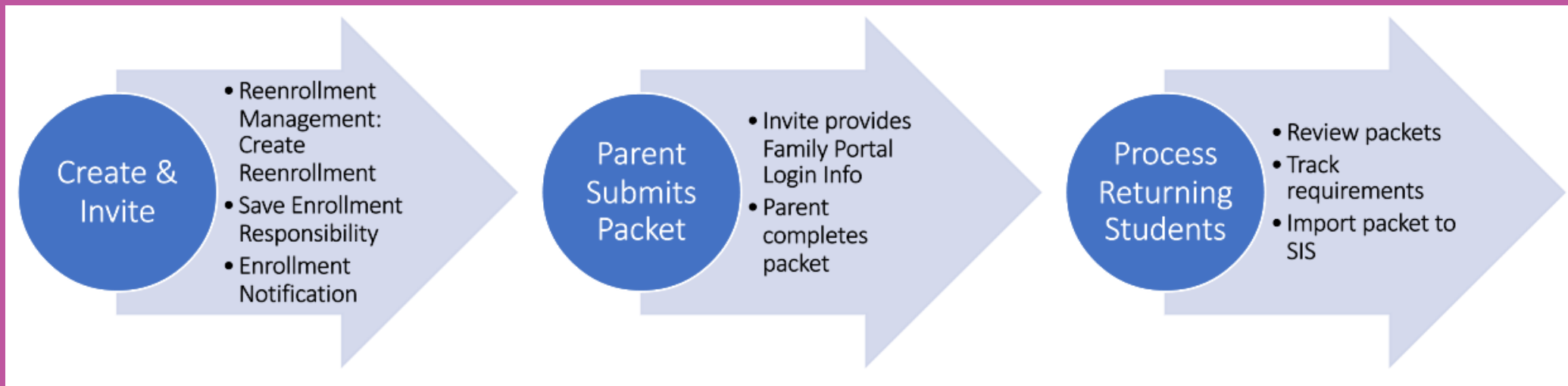
- ✓ Create reenrollment records. Returning Students > Enrollment Setup 
> Reenrollment Management > 
- ✓ Review enrollment responsibility and SAVE.
- ✓ [Send](#) reenrollment invitation emails.
- ✓ Parents submit enrollment packets.
- ✓ [Review](#) and import the submitted packets, tracking any other enrollment requirements, such as physical signatures and documents.
- ✓ [Next Steps](#)

Daily returning student tasks

- ✓ [Process](#) returning students.
- ✓ [Track](#) supplemental enrollment requirements.

Monthly/yearly Admin user tasks

- ✓ Create reports to better understand your pipeline.
- ✓ Modify your checklists, reenrollment packet questions, or other materials to make reenrollment more efficient.





Tuition Contracts



If your parents sign contracts **DURING** the **Enrollment Packet**, you **don't** need to invite them to sign.

If you have multiple signers, secondary parents will be automatically invited once enrollment responsible parents' sign.

If your parents sign contracts **AFTER Enrollment Packets are completed**, use the following steps once financial agreements are finalized.

1. From **Enrollment**, click **Tuition Contracts** dashboard.
2. Select **Assigned** to view only individuals that have not been invited.
3. Move your mouse cursor over a column to display the filter icon to filter the list.
4. Select students to display the "**Send Invitation**" option.
5. Click **Send Invitation** to email parents.
6. Select **Invited** to review those currently invited and the status of the contracts.



Troubleshooting Part 1



How do I prevent creating duplicates in your system?

While going through the import process for a packet, you'll see a step labeled **"Sync Setup Saved."** It's imperative that you synchronize current families/individuals with their existing IDs in the system. If the family/family individual doesn't appear automatically when establishing person-to-person connections, you'll need to verify this individual is new to your system and then select **"new"**.

- ✓ **Find their ID (main menu > families > search family last name > select family individual & get their ID top right)**
- ✓ **Navigate back to admissions > sync setup saved, and look them up by ID, making sure that we are tying them to someone already in the system.**

How do I relocate packets to an alternate year or different grade level?

This process is necessary when dealing with scenarios such as a parent submitting an application/enrollment packet for an **incorrect school year or mistakenly selecting the wrong grade level**. Additionally, it might be applicable if you initially anticipated a student's promotion to the next grade, but subsequently decide that retention is more suitable, even after the family has already finished the application/enrollment packet.

Steps to rectify these situations effectively:

- ✓ **Main Menu > Admissions > Application & Enrollment > Application (or Enrollment) > Application Parents (Enrollment Parents) > Type in Parents last name > search > you will then click where it says "# student application" ("# student enrollments) > then select "Assign to Different App" ("Assign to Different Packet") > You will see what their current packet is tied to and then below that you will see a drop-down box. From that drop down box, select the correct packet under the correct school year and grade level > then select "Submit"**

Once you have moved the packet(s) to the correct school year/grade level, you will need to update their admissions record as well. **Steps to update admissions record:**

- ✓ **Main Menu > Admissions > Search > type in students last name, click "Search" > you should see a record type: Admissions, you will want select where it says "finished, offer sent, offer accepted, App Submitted" > then on the left-hand side you will see drop down boxes, you will then want to update the Admission School Year and/or Grade level > save it on the bottom left-hand side.**

SUPPORT

As always, please feel to reach out for any assistance you may need with admissions or anything else regarding our system. We are pleased to assist you and your school. Please call: **866.800.6593**

REMINDER

The FACTS SIS & Admissions Support Line is for **STAFF only**. Parents must reach out to the school for assistance accessing the Family Portal.

[Additional Troubleshooting & FAQs](#)



Troubleshooting Part 2



When searching for a student, what happens when you see an admissions record **highlighted in red**?

An admissions record highlighted in red should not cause concern. This indicates that no grade level has been designated for that particular admissions record.

✓ **Click on the admissions status > on the left-hand side, choose a grade level in the drop-down box > save changes in the bottom left corner. After you hit return, you will now see that the row is no longer highlighted in red.**

How do I edit an inquiry form?

It might become necessary to perform these steps if you encounter a situation where altering the initially listed year or grade is required based on the parent's input. Similarly, if a parent initially applied for a specific grade level but subsequent discussions reveal a more appropriate grade for the child, these updates become relevant.

Here's how to carry out these adjustments:

✓ **Main Menu > Admissions > Application & Enrollment > Inquiry > Select the student's name that you wish to make changes to > towards the bottom left of the page, select the student's name under "Forms" > then select the pencil icon at the top, to the right of where it says "Inquiry Form" > make the changes you wish to then be sure to SAVE at the top – "Save Form"**

How do I un-import an already submitted application or enrollment packet?

You might find it necessary to perform this action when you've imported a packet, but now there are changes needed to be made.

✓ **You will need to reach out to your account manager or our Helpline. They will be able to un-import that packet for you.**

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Tips for Success

Here are a few tips and tools for you to grow in your use & knowledge of FACTS Admissions!



Admissions Videos

How-To Videos teach a single concept or how to use a screen in FACTS SIS.

Training Class Videos provide instruction on the use of multiple screens in an SIS area.

Q&A Videos answer many FAQs questions related to tasks performed in FACTS SIS.



Refresher Trainings

Attend live refresher webinars with our Enrollment Management Specialists!

Check your FACTS HOME screen or Admissions in Hub-Help to Register!

FACTS[^]SPACE

Give Feedback and Join a Community!

[Click here to join our FACTS[^]SPACE Crew!](#)

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