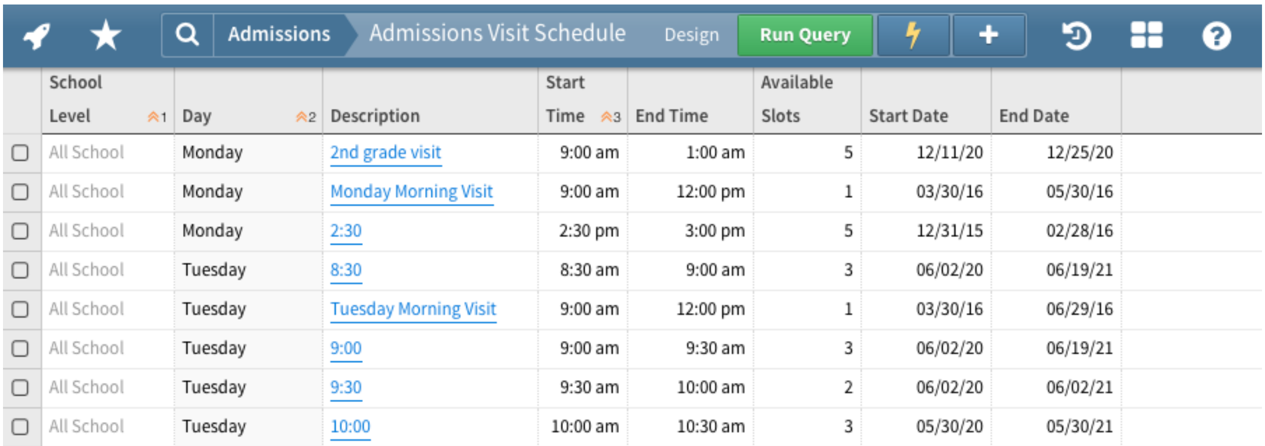
Admission Visit Configuration & Overview

Updated May 05, 2021

Overview

Use Visit Tracking in Veracross to track visit dates, times, participants (such as interviewers and tour guides), and other details. The Admissions Calendar can be set up to track open visit slots, upcoming visits, and even visits that were cancelled.

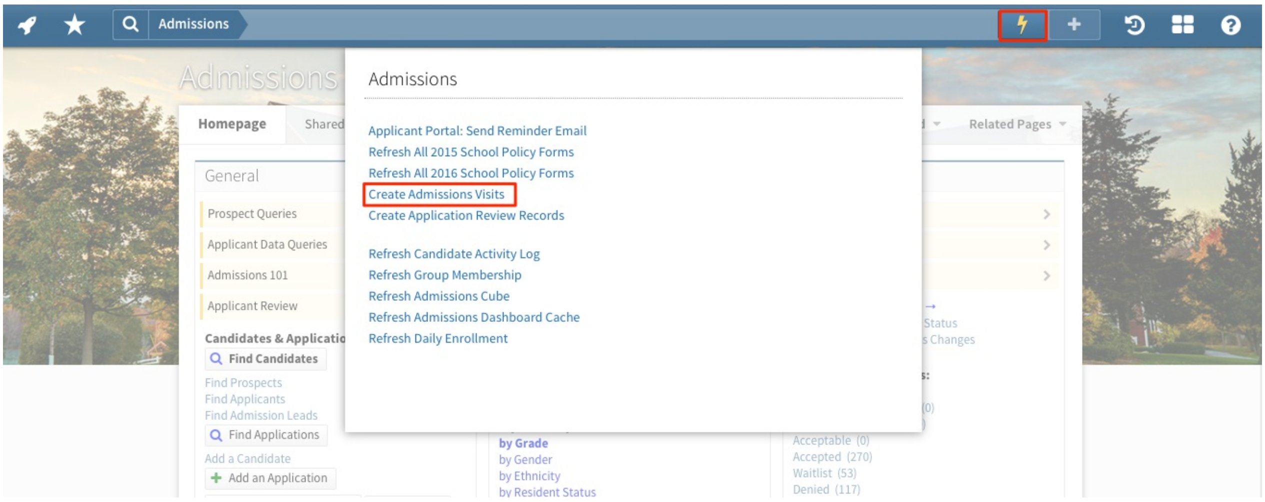
Configuring a Visit Schedule



School Level	Day	Description	Start Time	End Time	Available Slots	Start Date	End Date
All School	Monday	2nd grade visit	9:00 am	1:00 am	5	12/11/20	12/25/20
All School	Monday	Monday Morning Visit	9:00 am	12:00 pm	1	03/30/16	05/30/16
All School	Monday	2:30	2:30 pm	3:00 pm	5	12/31/15	02/28/16
All School	Tuesday	8:30	8:30 am	9:00 am	3	06/02/20	06/19/21
All School	Tuesday	Tuesday Morning Visit	9:00 am	12:00 pm	1	03/30/16	06/29/16
All School	Tuesday	9:00	9:00 am	9:30 am	3	06/02/20	06/19/21
All School	Tuesday	9:30	9:30 am	10:00 am	2	06/02/20	06/02/21
All School	Tuesday	10:00	10:00 am	10:30 am	3	05/30/20	05/30/21

Veracross can pre-populate the Admissions Calendar with visit slots based on a pre-configured schedule. While a configured visit schedule is not necessary for using Admissions Visit functionality, it can save an Admissions team time. View existing visit schedules by clicking on "Admissions Visit Schedule" under Other on the Admissions homepage.

To create a visit schedule, hover over the Add button + Add and select "Admissions Visit Schedule" on either the Admissions homepage or the System homepage. Each visit schedule record should contain the details to help build out the weekly visit slots. Use the fields for day, start and end times, start and end dates, and available slots to specify this information. It is customary for a school to have a large number of schedule records covering each day of the week with different times and different numbers of available slots per schedule record. For each schedule record that is added, a single blank visit record for that day/time slot will be added.



After a visit schedule has been setup, there are two different ways that Veracross will help manage the number of visit slots each day. The first is to create all visit slots at one time. Running the procedure "Create Admissions Visits" from the Action menu will prompt the system to create all blank visit records based on the pre-configured schedule. In order for this procedure to run successfully, the Calendar Day Rotations must previously have been generated. The other option is that Veracross will populate additional visit slots up to the number of possible slots specified by the schedule record each time an open slot is populated with a prospect.

Note that changing visit schedule records after visits have been created will not change the individual visit records.

Visit Schedule Exceptions

There are many reasons why a visit schedule for specific days may deviate from the configured schedule. To that end, it is possible to manage exceptions in the following ways.

Adding an *ad hoc* visit

1. From the Admissions Calendar, double-click in the desired day block (below any links for that day). This will bring up the generic Event screen
2. Specify "Admissions Visit" as the event type, enter a start time, and click Add
3. Refresh the Admissions Calendar

To delete an existing visit

1. Click on the visit slot from the Admissions Calendar, and then click the "delete" button on the detail screen
2. Refresh the Admissions Calendar

To reduce the number of available slots for a given timeslot

This option assumes that all visit slots have not already been created via the system option 'Create

Admissions Visits'. If that procedure has already been run, then use the two options above to manage adding and removing visit slots.

1. From the Admissions Calendar, click the day-of-week link (ex. "Monday")
2. Click the "Admissions Visits" tab
3. Alter the "Available Slots" field for the desired schedule

Configuring Visit Invitation Emails

Veracross supports a number of automated email notifications to help streamline communication as Visits are scheduled. These notifications can be configured to go out to Prospects and their parents, Interviewers, and other participants, such as coaches or program leaders.

Most schools will choose to have an initial "Notification" email sent out by the system within some number of hours of the visit being scheduled (usually within 24 hours). A later "Reminder" email may then be sent some number of days prior to the event, often 7 days before the event. The timing of when those are sent, and to whom they are sent, is configurable as documented below.

Sending Emails: General Configuration

As you'll read below, there are three potential configurable procedure types for when emails may be sent to event invitees. These three potential email notification schedule options are explained in the next section of this article. Prior to that configuration, however, it is important to determine and configure which people might receive an email. Without this first configuration step, no emails of any type will be sent to any Visit event invitees.

To enable visit reminder emails to be sent to Visit invitees, schools will need to configure the "Send Notification" checkbox for each relevant constituent. To do this, run the "Admissions Visit Notifications" query in the Admissions section of the System homepage, check all constituents who should receive notifications, and click "Update Records."

For most schools, the Visit Invitee Notification configuration will function only for the following Visit Roles seen on the "Admissions Visit Notifications" query:

- Prospect
- Interviewer
- Other

Some schools may have custom logic including additional visit roles, but for most schools Prospect, Interviewer and Other are the only visit Roles that allow for emails. For example, adding a visit invitation for someone with the visit role of "Organizer" will *not* result in any emails being sent regardless of configuration on this query.

In addition to the configuration listed above, there are three special types of notifications:

- The Visit role "Prospect" is special because the prospect's Parent(s) will also receive the visit notification email, even if the Parent(s) aren't explicitly listed with Visit invitation records
- The Tourguides will get notification and/or reminder emails – whichever types are enabled in configuration described below – if a Tourguide is listed for the event, the event timing fits within the event type configuration explained below, and if the "Admission_Visit_Tour_Guide" email template is present in the school's email template configuration
- Visit invitation emails based on *shared interests* (as documented further down in this article) are *unrelated* to the "Admissions Visit Notifications" configuration described above

Email Templates

Email Templates must also be present in your school's configuration. These are typically configured by Veracross Engineering, but schools may choose to add the templates themselves. Templates with the following Descriptions must be present for the emails to work for the proper roles:

- **"Admissions_Visit_Interviewer"** is the email template that will be sent to anyone invited to the event with the event role of "Interviewer"
- **"Admissions_Visit_Program_Leader"** is the email template that will be sent to anyone invited to the event with the event role "Other"
- **"Admissions_Visit_Prospect"** is the email template that will be sent to anyone invited to the event with the event role of "Prospect," plus, this same email template is also sent to the Parents of the prospect
- **"Admissions_Visit_Tour_Guide"** is the email template that will be sent to a Tourguide configured in the Visit event record

Note that the Email Templates should include one of the words "Notification" or "Confirmation" in the subject line if a typical email scheduling configuration is being used, as described below under "Email Procedure Type 1" and "Email Procedure Type 2." But in final consideration, the email template configuration – including the subject line – is up to the school to configure however they would prefer.

If a school is setting this up for the first time and the Merge Variables are not listed in the template configuration, they should speak with their account manager.

There are **three different** email procedure types described in the following sections. The three procedure types are differentiated from one another along the following two factors:

1. Which Visit events result in emails being sent? In each of the three email procedure types, this is defined in relation to dates: Either in relation to when the Visit event was configured (type 1 below) or in relation to the Visit event date (type 2 sends an email exactly N days before a Visit,

and type 3 sends an email N days or fewer before a Visit as described below)
2. Is the Prospect (and their parents) emailed or not? This is defined in the following three procedures depending on the prospect's event "attendance status". If their attendance status is "Invited," they can be notified using procedure type 1 or 3 below. If their attendance status is "Confirmed," they can be "reminded" using procedure type 2 below.

Please note that regardless of which of the three procedure types are used, apart from the standard feature that uses the attendance status "Confirmed" for the prospect, it is not possible to configure that a certain invitee role receives the "notification" email vs. the "Reminder" emails. For instance, if "Other" role is configured to receive notification (as described above), they will receive all three of the types of notification described below.

Please also note that Veracross Engineering must set up these procedures for individual schools. If schools wish to set up these procedures, they should speak with their Account Manager.

Sending Emails: Email Procedure Type 1: "Initial Notification"

Typically, the first email that Visit event invitees receive is the initial Notification email. The purpose of this email is to send a timely notification to people who have been scheduled for an event – typically, within 24 hours of the event being configured. For most schools, this initial Notification (also sometimes called "Confirmation") email is scheduled to be sent daily in the evening for any event that was scheduled within the past 24 hours.

To be specific, this "Initial Notification" scheduled job does two things every time it runs: (1) It sends emails to Visit event invitees, such as the prospect & parents [if the prospect's attendance status is "invited" at the time the procedure runs], interviewer, coach, and/or tourguide, as long as the event was scheduled and/or updated within the past 24 hours, and (2) it also changes the Prospect's attendance status to Confirmed.

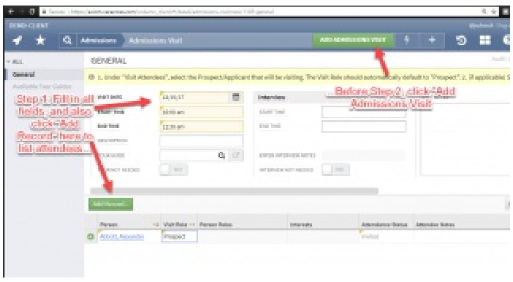
> Note: Other invitees [Tourguide, Interviewer, and Other] will be sent this email (regardless of their attendance status) any time a Visit event has been Updated within the past 24 hours. This could lead to your "Interviewer", "Tourguide", or "Other" invitees receiving multiple emails about an upcoming event in situations where the events are repeatedly updated or modified in the days leading up to a visit. This is by design: Typically an Update to an event *should* result in the various attendees being notified about a change in time or venue, etc. For this reason, best practices encourages either (a) Configuring the Interviewer, Program Leader, and/or Tourguide email templates to refer to the fact that details may change if they get an updated email, and/or (b) Avoid updating Visit Events via Axiom as much as possible so that Event Update Date is not updated, triggering fresh emails to be sent within 24 hours.

The initial Notification email has the following configurable facets:

- “Event_Update_window” is the configurable parameter that defines this particular procedure-scheduled job. This parameter is measured in “Number of Hours.” Typically, this parameter is configured as the value “24”, and is used to answer the question: *which Visit Events should result in Notification Emails being sent?* The answer to that question is, “Any Visit event that’s either been created and/or updated within the past “24” hours before the exact date and time when the procedure runs,” which is, typically, daily at 5pm. Specifics:
    - If the event “Update Date” field is less than or equal to 24 hours before the time when the procedure runs, then email(s) are sent to all configured invitees, and the Prospect’s attendance status is flipped to “Confirmed”.
    - If the Event “Update Date” field is blank, then the procedure defaults to using Event “Input Date.” If the event “Input Date” field is less than or equal to 24 hours before the time when the procedure runs, then email(s) are sent to all configured invitees, and the Prospect’s attendance status is flipped to “Confirmed”.
- The time of day for the Job can be configured. The best practice is 5pm daily, but can be configured to run in the morning instead, if desired.
- The Job that sends emails using the “Event_update_window” parameter is optional, independent of the two other Email options listed further down in this article.

Two common data entry scenarios or use cases might look like this:

- Example 1: On December 4th at 3pm, John Doe registers via the Admission Portal as a Prospect for a visit to occur on December 19th. That visit timeslot was initially created, but left blank, earlier that year in June.
    - Because the school uses this initial Notification,
    - and the job is scheduled for 5pm daily,
    - and the Event_Update_window is configured as “24,”
    - and “Admissions Visit Notifications” is configured to send confirmations to the Prospect visit role,
    - and because the act of scheduling set the Event “Update Date” as “Dec 4, 3:00pm”
    - **then** on December 4th at 5pm, John Doe and his Parents receive the email,
    - and John Doe’s attendance status is flipped from “Invited” to “Confirmed”
- Example 2: On December 9th at 2pm, Admissions staff receive a call from Alex Abbott’s family requesting a visit for December 15th. While on the phone, admissions staff use Axiom to create a new Visit event record, and fill in fields for Date, Time, etc, and add Alex Abbott’s Visit Attendance Record before clicking “Add Visit Record”. See screenshot illustrating this data entry scenario.



- Because the school uses this initial Notification,
- and the job is scheduled for 5pm daily,
- and the Event_Update_window is configured as "24,"
- and "Admissions Visit Notifications" is configured to send confirmations to the Prospect visit role,
- and because this particular act of scheduling set the Event "Update Date" as **blank** in this case, but set the Event "Input Date" as "Dec 9, 2:00pm"…
- **then** on December 9th at 5pm, Alex Abbott and her Parents receive the email
- and Alex Abbott's attendance status is flipped from "Invited" to "Confirmed"

Sending Emails: Email Procedure Type 2: "Reminder" Email

Typically, the second email that Visit event invitees receive is the Reminder email. The purpose of this email is to send a Reminder to people who have been scheduled for an event – typically, 7 days before the Visit. For most schools this Reminder email is scheduled to go daily in the evening.

To be specific, this "Reminder" scheduled job does a few things every time it runs: (1) It sends emails to Visit event invitees, such as the prospect & parents [only if the prospect's attendance status is "Confirmed"], interviewer, coach, and/or tourguide, to remind them of upcoming visits – typically 7 days in advance, and (2) it also changes the Subject line in the email template when it sends the email. If either words "Notification" or "Confirmation" are present in the email template subject line, they will be replaced with the word "Reminder". For example if the email template subject line is configured in Veracross as "Visit *Notification* for {prospect_name}", then this procedure will send an email with the subject as, "Visit *Reminder* for {prospect_name}," and also (3) This procedure will always change the Prospect's attendance status from Invited to Confirmed any time it runs, no matter how many days in advance of the actual event it is run.

> This "Reminder" scheduled job only sends an email to prospects (and their parents) if the Prospect's attendance status is "Confirmed" at the time the procedure is run. Therefore, if the Prospect's attendance status is currently set as "Invited," when this particular procedure is run but neither of the other two procedure types are scheduled, the prospect won't end up receiving any automatic emails. Best practice suggests (a) At least one of the other two notification types should be utilized in addition to this "Reminder," OR, (b) Prospects should always be scheduled with the attendance status of "Confirmed" to utilize this particular email type if your school is not using the other email procedure types.

The "Reminder" email has the following configurable facets:

- "Days_in_advance" is the configurable parameter that defines this particular procedure-scheduled job. This parameter is measured in "Number of Days." Typically, this parameter is configured as the value "7", and is used to answer the question: *which Visit Events should result in Emails being sent?* The answer to that question is, "Any Visit event where the Visit Date is 7 days from today." This could be configured as some value other than "7".

- The time of day for the Job can be configured. The best practice is 5pm daily, but that can be configured to run in the morning instead if desired.
- The Job that sends emails using the "Days_in_advance" parameter is optional, independent of the two other Email options.

If the "Days_in_advance" parameter is set as 7 in configuration, then the "Reminder" email will not send if the event is less than 7 days from "today" when the procedure runs. For instance, if a Visit to occur December 10th is scheduled on December 4th, then the Reminder email will never be sent to these invitees. The invitees will only receive the Notification email that may be sent.

Sending Emails: Email Procedure Type 3: "Notification Window" Email Workflow

This separate notification email workflow is less commonly utilized, but, depending on your school's scheduling policies, this could help cover exceptions.

This Notification Window option might be described as a "hybrid" version of the above two options. Similar to the "Reminder" described above, this Notification Window option sends emails to invitees based on the *number of days before the Event*, but on the other hand, similar to the "Initial Notification" described above, this third option will only email the prospect & parents if *the attendance status is "Invited."* The thing that sets the "Notification Window" type apart from the other two email types is that it will send emails for events that are "7 days *or less*" from today.

To be specific, this "Notification Window" email scheduled job does a few things every time it runs: (1) It sends emails to Visit event invitees, such as the prospect & parents [only if the prospect's attendance status is "Invited"], interviewer, coach, and/or tourguide, to remind them of upcoming visits – typically, if the event is 7 days or less from today, and also (2) This procedure changes the Prospect's attendance status from Invited to Confirmed.

This notification type is unique because it will work for any number of days equal to *or less than* the configured parameter value. For instance, if your school uses the Reminder Email and "Days_in_advance" (procedure type 2 as described above) is set as "7", then people *won't be notified* for events if they happen to be scheduled only 5 or 6 days in advance. But if your school uses the Notification Window email parameter, and the "Notification_window" is configured as "7", then people *will* be notified for events if they happen to be scheduled only 1 or 2 days in advance.

The "Notification Window" email has the following configurable facets:

- "Notification_window" is the configurable parameter that defines this particular procedure-scheduled job. This parameter is measured in "Number of Days." Typically, this parameter is configured as the value "7", and is used to answer the question: *which Visit Events should result in Emails being sent?* The answer to that question is, "Any Visit event where the Visit Date is 7 days *or less* from today." This could be configured as some value other than "7".
- The time of day for the Job can be configured. The best practice is 5pm daily, but can be configured to run in the morning instead, if desired.
- The Job that sends emails using the "Notification_window" parameter is optional, independent of the two other Email options

This third email notification scheduling type sends emails for events that are "7 days *or less"* from today. For prospects and parents, they will only get one email because, after the first time they get an email, their status is flipped from Invited to Confirmed, and they don't get this email if their status is Confirmed. But for other invitees (Tourguide, Interviewer, Other) they will get an email *every day* within the window. So depending on the types of invitees your school uses, this email type may not be right for your school.

Email Notifications In Summary

The emails are sent daily based on a pre-set, configurable time. While the end of the work day (5pm) is the typical choice, this setting can be changed by a Veracross Account Manager.

When inserting a visit, a role is chosen for each person attending with the exception of tour guide, and that is the role that determines which template is used. Tour Guides have a dedicated field on the event that determines the email template they receive.

Both Prospects and Parents of Prospects receive emails based on the Prospect Visit role given to the prospect associated with the event. Both parties' email uses the template called Admission Visit Prospect. Tour Guides and Interviewers receive their named templates respectively. The template for Admission Visit Program Leader gets sent to people who were given the participant role of 'Other.'

When do emails go out?

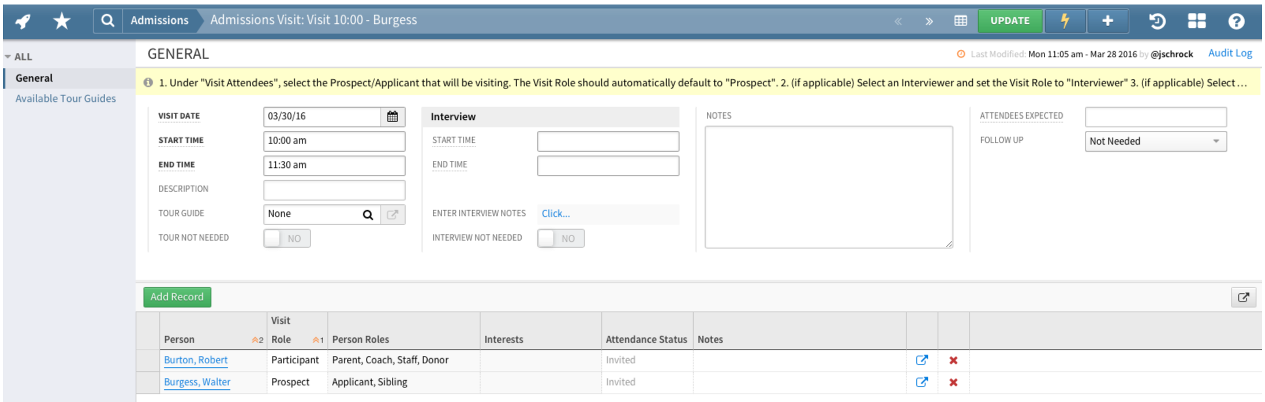
There are a few options for controlling when emails go out. It is simplest to have the automated emails go out twice for the Prospect and parent: once as the notification and once as a reminder. For other invitees like Interviewer, they may get more emails depending on which notification types are used, and whether Events are being "Updated" regularly (see details about email procedure Type 1 or 3 above).

Common Configuration Setups

- Andrews Academy prefers to notify families and interviewers with automatic emails within 24 hours of the scheduling of a visit, and again 10 days before the visit date. So they have configured both the “Prospect” and “Interviewer” visit attendee roles to receive notifications; and they have email procedure type 1 and 2 configured, with the “Event_update_window” parameter configured as “24” for their school, and the “Days_in_advance” parameter configured as “10” for their school. As a result, every single Visit, as long as it’s scheduled at least a day in advance of the actual date, receives the initial Notification email based on the 24-hour window; and most visits also receive a Reminder email 10 days before the event, but any visit that was scheduled less than 10 days before the event would never receive that Reminder email. With this configuration, Interviewers may end up getting more than one of the Notification emails any time a Visit is modified or changed (e.g. if the date or time of the event are changed), but this is fine because Interviewers know to expect updates from time to time. Andrews Academy also configures Tourguides for visits, but instead of using automated email notifications, they choose to notify the Tourguides of their schedules via other means, such as the student portal calendar, so they deleted the “Admission_Visit_Tour_Guide” email template from their Veracross Email Templates configuration.
- Bremer Boys School prefers to avoid sending more than one email to any constituency; and they also want to be able to invite and notify Interviewers, Tourguides, Coaches, and any other possible invitee. So to accomplish this, they have configured Prospect, Interviewer, and Other visit roles to receive notifications, and only configured the Procedure Type 2 as described above, to only send the “Reminder” email. (Instead of calling it a Reminder email, they changed the email subject line to “Visit Notice”). The “Days_in_advance” parameter has been configured as 7 for this school, so this “Visit Notice” email is sent just once, 7 days in advance of any visit. To maintain integrity in their scheduling of visits, Bremer Boys School Admissions department maintains a policy that visits must ALWAYS be scheduled at least 7 days in advance of the visit date so that the parameter set as “7” guarantees that each visit has notifications.
- Crysanthemum Country School wants to send a notification to all attendees 7 days in advance of the visit, and also a “countdown” type reminder to the interviewer and tourguide. To accomplish this, they have configured Prospect and Interviewer visit roles to receive notifications, and they only configured the Procedure Type 3 as described above. They want the first notification to be sent 7 days in advance of the visit, so the “Notification_window” parameter has been configured as 7 for this school. As a result, exactly 7 days before the event, the Prospect and their parents will get an email, which also automatically flips their attendance status to “confirmed”. And starting 7 days before, and every following, the Interviewer gets an email notice reminding them of the upcoming visit. If they wish to reschedule a Visit with a different date or time, they simply modify the information on the existing Visit record in Veracross, and change the Prospect’s attendance back to “Invited,” which will cause the email notification to be sent again to that prospect and their parents one more time.

Managing Admissions Visits

The primary place Admissions Visits are managed is via the Admissions Calendar. The Admissions Calendar will show gray links for any unscheduled visit slots, bold blue links for any scheduled future visits that have yet to take place, or plain (non-bold) blue if a scheduled visit has already taken place. Clicking on any one of the visit links will pull up the visit detail screen, which contains the information pertaining to the visit.



The visit detail screen is where the details of the visit are tracked. It is common to use the Description field to indicate when the visit differs from a regular on campus visit (for example, a Skype Interview). Time fields exist for both the overall visit as well as the interview should it be necessary to track different parts of the visit.

The visit detail screen also contains the Attendees input grid where different visit participants are tracked. The following Visit Roles should be used when scheduling visits:

- Prospect
- Interviewer
- Teacher
- Parent
- Other

Typically, although Parent may be explicitly listed as attendees, that doesn't define the emails that they receive: Emails are sent to them via the Prospect's attendance record.

As noted above in the section pertaining to email notifications, the roles of Prospect, Interviewer, and Other can be configured to receive interview notifications and reminders.

The Attendees list includes an Interests field that will pull all inserted interests that exist on the prospect. The Attendance field will be moved from Invited to Confirmed once a notification goes out. As noted above, it is possible to mark the attendance status to Confirmed to avoid that initial email notification.

It is up the user to mark a visit attendance status Attended or Did Not Attend to indicate whether or not the visit took place.

Learn more about How to Schedule an Admissions Visit.

Inviting Coaches and other Program Leaders to a Visit

Coaches and other Program Leaders can be invited automatically to Admission Visits based on shared interests with a prospective student. In addition, a minimum proficiency can be specified so that coaches or program leaders only get automatically assigned to a visit when a prospect has a specific proficiency in their subject of interest.

Configuring these invitations requires four steps.

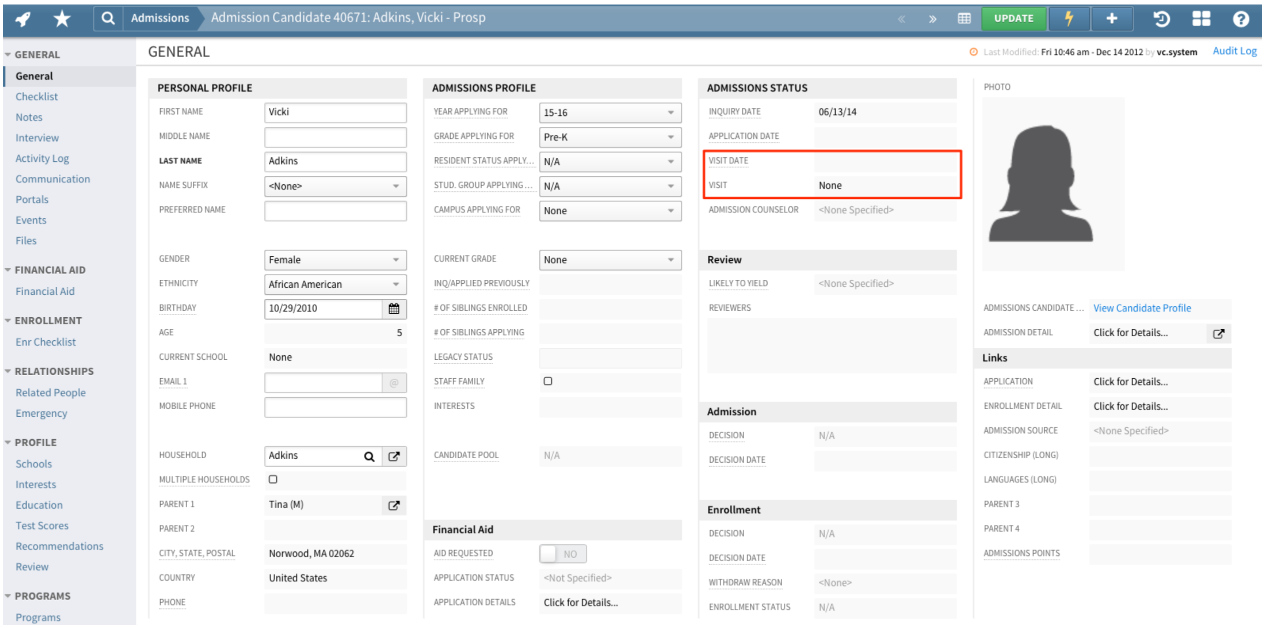
1. Run the “Person Interests” report from the System home page (Configuration -> Admissions/Enrollment)
2. Check the “Create Admissions Visit Invitiations” field for the relevent interests
3. (Optional) Select the appropriate “Minimum Proficiency Level”

Tour Guides

Unlike other participants, a Tour Guide gets specified on the Visit detail screen in the Tour Guide field. If the System Profile Code ‘Admissions Tour Guide’ has been tagged to those eligible to be Tour Guides, then the Available Tour Guides tab can be used to help find a Tour Guide. Veracross will match on interests, gender, resident status, and common schools.

In addition, student Tour Guides will have their class schedules checked to avoid any conflicts between scheduled classes and the visit start and end times.

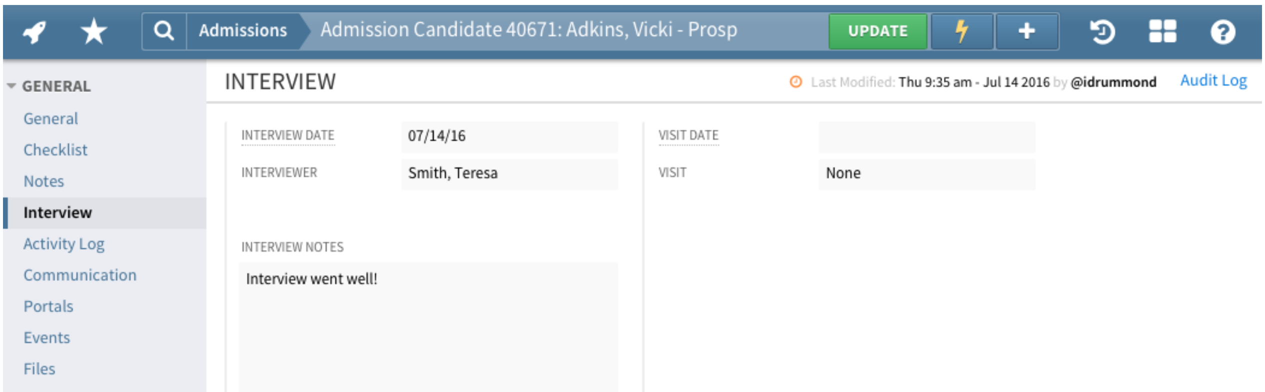
Where to view Scheduled Visits



When a visit has been scheduled, the visit date and a link to the visit will show up on the new Prospect/Applicant detail screen General tab. This gives users a quick look to see if a visit has been scheduled, including a quick link to the visit record itself.

If the Admissions Visit date changes, the changed date will propagate from the visit event record to the visit date on the Prospect/Applicant detail screen.

Interview Details



Interviews are one of the main focuses of an Admissions Visit. The Interview tab on the Prospect/Applicant detail screen gets data directly from a scheduled visit. While initially the fields are blank, after the visit has been scheduled, fields for Interview Date, Interviewer, Visit date, and Visit will display data being pulled directly from the visit. Note that these fields should not be used to schedule a new visit, but are used to display an already existing visit. There is a use case for updating data in these fields. Learn more about Admissions Visits (light).

If multiple visits exist for a prospect or applicant, the visit associated with the prospect or applicant's year applying for and grade applying for will display. This is most often the case when a candidate has gone through the admissions process in a past year.

The Interview Notes field on the Interview tab of the Prospect/Applicant detail screen is the primary place where interview notes should be stored. If multiple interviews occur, each interviewer should put his or her initials before typing notes into the field.