

Managing Admissions, Enrollment, and Re-Enrollment Exceptions

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

The purpose of this documentation is to explore the various workflows Veracross suggests for managing Admissions and Enrollment process exceptions.

Read more about [migrating and copying admissions data](#)

Admissions Exceptions

Applicant was accepted for a future school year, but later decided to enroll mid-year for the current school year.

Example: Mike was accepted to the 16-17 school year for 5th grade, but later the family decides to enroll him mid-year as a 4th grader in the 15-16 school year.

The data should reflect that the student applied for the current school year, not a future year. To do this, run the "Move Admissions Candidacy Backwards One Year" procedure from the applicant's admission record.

Veracross: Sandbox

Admissions Admission Candidate 61816: Test, Mike - Applicant

UPDATE [Lightning Bolt Icon] +

GENERAL Admin

PERSONAL

CREATE ADMISSION PORTAL ACCOUNT

REMOVE ADMISSION PORTAL ACCOUNT

SEND VC WELCOME EMAIL

MOVE ADMISSION CANDIDACY FORWARD ONE YEAR

MOVE ADMISSION CANDIDACY BACKWARD ONE YEAR

COPY ADMISSION CANDIDACY (EXCL. WEB FORMS) FORWARD ONE YEAR


COPY ADMISSION CANDIDACY (INCL. WEB FORMS) FORWARD ONE YEAR

RE-SYNC ADMISSION CANDIDACY

ACTION

ADD CORRESPONDENCE...

ADD APPLICATION

- Navigate to the applicant’s person record.
- From the Action menu , run the procedure “Move Admissions Candidacy Backwards One Year.”
- After the procedure has run, the Year Applying For and the Grade Applying For values will both have been decremented (decreased) by one year/grade level.

Application is for the incorrect grade.

Example: A Pre-k student is entering Kindergarten in the coming year, but the school has decided instead to accept the student for Pre-k.

Veracross: Sandbox

Main Application 3400: Test, Mike - 4

UPDATE [Lightning Bolt Icon] +

GENERAL Last Modified: Mon 5:03 am - Mar 07 2016 by @jjpf

Applicant

NAME Test, Mike

ADMISSIONS CANDIDATE... View Candidate Profile

CURRENT GRADE Pre-K

YEAR APPLYING FOR (APP.) 16-17

GRADE APPLYING FOR Pre-K

RES. STATUS APPLYING F... None

FINANCIAL AID REQUESTED Pre-K

Status

INQUIRY DATE

APPLICATION DATE Feb 27, 2009

VISIT DATE

ADMISSION COUNSELOR <None Specified>

INTERVIEWER <None Specified>

ADMISSION CODE

LIKELY TO YIELD <None Specified>

Admission

DECISION

DECISION DATE

Enrollment

DECISION

DECISION DATE

DECLINE REASON

Kindergarten

Grade 1

Grade 2

Grade 3

Grade 4

Checklist Item

Scheduled Date	Completed Date	Complete	Up Comp	Follow Up Date	Notes

Change the applicant’s Grade Applying For.

- On the application, change the Grade Applying For value to the correct grade.


- Note: If the application is un-editable, go to the “Other” tab and unlock the application. It will be “locked” if the application status had previously been set to one of the “decision” statuses (accepted, denied, etc.).

Applicant submitted an application for this year when they meant to apply for next year.

Example: Mike submitted an application for 15-16 when he really wanted to apply for 16-17.

The screenshot shows the Veracross Sandbox interface for an admission candidate named 'Test, Mike'. The 'Action' menu is open, and the option 'Move Admission Candidacy Forward One Year' is highlighted with a red box. A red arrow points to the lightning bolt icon in the top right corner of the interface.

The admissions data for this current year needs to be moved to next year. To do this, run the “Move Admissions Candidacy Forward One Year.” Note: You can run this procedure regardless of whether or not the application status is “Accepted” or “In Progress,” etc.

- Navigate to the candidate’s person record.
- From the Action menu , select the procedure “Move Admissions Candidacy Forward One Year.”

This will now update the Application, the Application checklist items, the Inquiry, and the Person detail screen to be the year applying for one year ahead of where it previously had been. Grade Applying for is also increased one year.

Applicant is “rolled over” to be considered the following year.

Example 1. James applied for 16-17, but was officially “waitlisted” and the school would like to “roll over” their candidacy to be considered for 17-18.

Example 2. Cindy initially applied for 16-17, but the family later says they wish to apply for 17-18

and it is the school's policy to retain the original 16-17 application for reporting purposes.

If the school wishes to copy forward the candidacy in exactly its current state (copying the application if there is one, the decision on the application, the inquiry, etc.), there are two menu options available:

1. Copy Admissions Candidacy (Incl. Web Forms) Forward One Year.
2. Copy Admissions Candidacy (Excl. Web Forms) Forward One Year.

Two major benefits of these menu options are

1. The data is copied requiring very little manual effort.
2. Because it's copied, not just moved, the data will still allow for complete reporting on previous admissions years counts of inquiries, applications, etc.

These menu options do the following:

- Copies the application in its current state (with decisions), with the year increased by one.
- Copies the checklist in its current state, with the year increased by one on each checklist item.
- Copies the "admission history" forward (which runs the Admission Portal), with the year increased by one.
- Copies the inquiry, with the year increased by one.
- Increases the person's Year Applying For by one to keep everything in sync.
- **Optional:** All the previously completed webforms (such as the online application form, demographic form, etc.) can be copied forward *or* the school can choose the menu option that excludes webforms in the copy. This would allow the candidate's family to fill out the online forms again.

*These menu options **do not** increase the Grade Applying For.* If by copying the admissions candidacy forward the prospect or applicant should be considered for a higher grade level as well, then the school may manually change the "Grade Applying For" on the candidate's record.

Applicant has already "rolled over" to be considered the following year, but we wish to accept them for the current year after all

Example: James applied for 17-18, but was officially "waitlisted" and the school would like to "roll over" their candidacy to be considered for 18-19. Then a spot re-opened for 17-18, so we really want to accept him for 17-18 even though all his current data says 2018.

If a rollover has occurred already but the school wishes to accept the candidate for the "previous" admissions year after all, the process to make the change is not complicated. The following rules apply in circumstances where:

- The candidate's current Year Applying For is "YYYY" (e.g. 2018)
- But the candidate also has a full complement of "archived" or old admissions data for "YYYY"-1 (e.g. 2017). For this reason, "move candidacy" will not be feasible because there's already data in the targeted year.
- And the YYYY (e.g. 2018) Person_admission record "is current" value is YES, while the YYYY-1 (e.g. 2017) Person_admission record "is current" value is NO.

Here are the steps to follow.

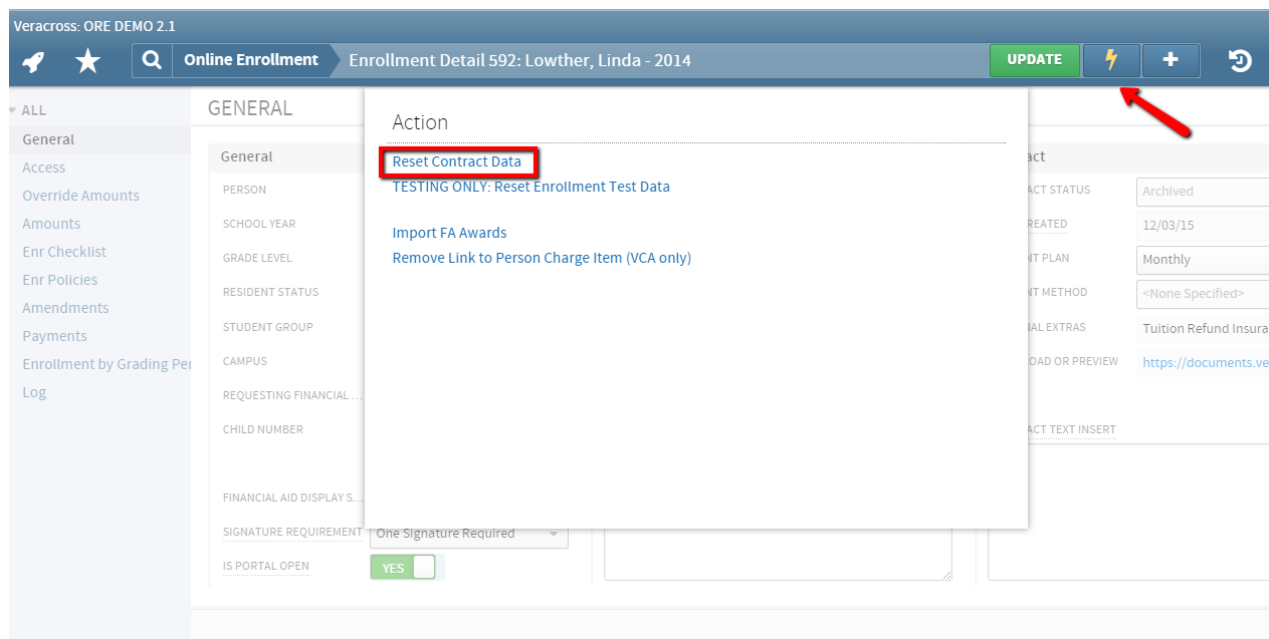
1. Open the admission candidate detail for the candidate, the screen seen in the above screenshot.
2. Decrement "Year Applying For" and "Grade Applying For" fields by 1: E.g. change "Year Applying For" back to 17-18, and also change "Grade Applying For" down by 1 as well.
3. Click the green "update" button on that detail screen to save the change
4. Then open the Action menu and run the "Resync Admissions Candidacy" procedure, that will tell the system that their 17-18 application – the year you just changed the kid's record to, in step 2 – is the current, or now "active" one.
5. Then "accept" the kid's application by changing the admissions decision to some accept value
6. Finally, delete all the 18-19 admissions data. This last step is not urgent: It is ONLY vital if the student matriculates and enrolls, and/or if you are running reports on the 18-19 admissions pipeline: because the existence of 2018-19 admissions application data would both interfere with the student's Re-Enrollment process later in the future, and it would also interfere with 2018-19 pipeline reports where you wouldn't wish to see that student's info counted. In other words, "re-sync candidacy" back does NOT delete the 18-19 data: That will all still be in place and is likely unwanted after the process that has been done to accept the kid for 17-18. The Admissions Data that you should delete comprises: (a) Individual events for the 18-19 year, e.g. "initial inquiry received"; (b) "Application" record for the 18-19 year, (c) Checklist items for the 18-19 year, and (d) Admission History records for the 18-19 year for that individual.


Enrollment Exceptions

Family signed a contract with incorrect information.

Example: A family re-enrolled for 6th grade when their child should have re-enrolled into 5th grade, resulting in an incorrect Grade Applying For.


The best way to resolve this is to reset the contract. The steps to take are:



1. Navigate to the enrollment detail for the person in question.
2. From the Action menu  , run the procedure “Reset Contract Data.”
3. Instruct the family to log into the Enrollment Portal, correct the incorrect data, and re-sign the contract.

Additional Clean-up

Depending on policy configuration, it may be necessary to change the policies that apply to this enrollment as they are grade level-specific. In this example, the school may have policies that apply to incoming 6th graders that do not apply to 5th graders. To manage these policies:

- Navigate to the “Enr Policies” tab on the Enrollment detail.
- Remove the incorrect policies.
- Overnight, the correct policies that apply to this Grade Applying For will be populated onto the Enrollment record. To force this, run the procedure “Refresh all YYYY School Policy Forms” from the Action menu  on the Admissions Homepage.

Current student is repeating or skipping a grade

In order to have a student repeat or skip a grade, simply set the “Grade Applying For” field to whatever grade they are entering. The proper order of the steps is:

1. After “Start Re-Enrollment” has been run (which typically is only performed once, at the outset of the enrollment season),
2. ... Then change “Grade Applying For” to whichever grade level the student is entering for next year, such as repeating the same grade or skipping.

For example, for students currently enrolled in 7th grade, the system default for “Grade Applying For”

will be 8th grade. To repeat the grade, set “Grade Applying For” to 7th. For skipping a grade, set “Grade Applying For” to 9th grade.

That field can most easily be found on the Enrollment Checklist tab on the Student Detail. (On the Enrollment Checklist Tab, the field name is abbreviated as “Grade Level.”) The “Grade Applying For” field can also easily be pulled into any Find Students query and updated via the query results. Importantly, the Person field is the one that needs to be updated.

Under normal operations, “Grade Applying For” will automatically be set to the “next” grade level after their current grade when “Start Re-Enrollment” is run, so this kind of update only needs to be considered for these rare exceptions.

A new student has just entered mid-year, and should now be eligible for “Re-Enrollment” for the next year

Once the parents have gone through New Enrollment, and if the student has already entered the school (entry date is in the past), they are now eligible for Re-Enrollment. In order to allow access to Re-Enrollment, you first need to navigate to the student’s Enrollment Checklist tab.

From there, update their Grade Applying For to the next grade level and their Year Applying For up one. This should generate the Re- Enrollment Checklist items and update their Enrollment Status to Pending Re-Enrollment.

When you have done this, you will want to run the Create Missing Enrollment Records procedure from the Online Enrollment Homepage to create the Enrollment Detail record for the next year.

Once the Enrollment Detail has been generated for the next (RE-enrollment) school year, you can have the parents log in to complete the Re-Enrollment process when you have opened the Re-Enrollment Portal.

On the off chance that something remains out of sync after following those steps, check to verify that “Enrollment History” record(s) exist for the current school year. These are generated automatically after the entry date. They are the records that indicate the year/grading period that a student is actually enrolled as a student. Workarounds may require that you occasionally add “Enrollment History” records manually. If this ever does occur, please submit a ticket indicating the scenario where the student’s Entry Date was in the past, but Enrollment History records weren’t created automatically by the system. Once Enrollment History records are created, use the Online Enrollment Homepage Menu and run “Create Missing Enrollment Records,” “Update Enrollment Type,” and “Refresh (next year) Enrollment Checklists” in order to refresh everything.

Student initially declines an Enrollment offer, but then changes their mind

Sometimes, a student declines an enrollment offer, but then changes their mind and decides to accept it. In order to update this, navigate to the “Enr Checklist” tab of the student’s Enrollment Detail screen and then perform the following steps:

1. Un-check the “Declined Offer” checklist item, and then click Update.
2. Check any other checklist item and then un-check that item. This will force the enrollment status to update.
3. Student will then be able to Accept the Enrollment offer, if they so choose.

Student enrolls but then decides not to attend the school

If a student accepts the enrollment offer, but then changes their mind and decides to not attend the school, handle it in one of two ways depending on when they make their decision:

- If they decide to not attend before the school year begins, fill out a “Withdraw Reason” and check the “Declined” checklist item.
- If they attend school for one or more days (even if just one), they should be considered withdrawn: fill out a “Withdraw Reason” and populate an exit date.

Re-Enrollment Exceptions

Student re-enrolls but then decides not to attend the school

If a student initially accepts the re-enrollment offer, but then later decides not to attend the school, handle it in one of two ways depending on when they make their decision:

- If they decide not to re-enroll before the school year begins, check the ‘Not Re-Enrolling’ checklist item and this will automatically correct during the overnight scripts.
 - If they attend school for one or more days (even if just one), they should be considered withdrawn: fill out a “Withdraw Reason” and populate an exit date.
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