

# Administration, Troubleshooting, and Maintenance for Online Re-Enrollment

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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

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This article will guide you through the common maintenance and troubleshooting tasks made available on the ORE homepage, as well as give examples of common issues with the enrollment process not immediately solvable on the ORE homepage and how to solve them.

## Common Enrollment Scenarios

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These are common scenarios that you will encounter while administering this process.

### Approving Pending Household Profile Updates

*The link [HPU Updates: Requires Approval](#) displays a list of updates made from an HPU form that requires approval of the school in order for the data to be changed (i.e., has "pending" approval status)*

The report displays the household to which this update applies, the card category from which the change was made, the table name and update user, and the approval status of the update. The Household Profile Update Journal Log is also available from this report. The school administrator can use this report to view a list of all change requests that must be reviewed before they can be committed to the database. Request change approvals are managed using the "Approval Status" dropdown menu options. Once the change request has been updated to an "approved" status, the change will be made in the database.

### Resetting a Contract

From a *Person Enrollment* detail screen, click on the Action menu and run the "Reset Contract Only" procedure. This should be used after doing a test and in cases where parents need to re-start their contract. This process means that:

1. Payment plan and optional extras are wiped out from the contract (*not* the Person record).
2. Signatures are deleted.
3. The *Complete* flag is cleared from the system checklist item *Contract Complete* (ID 35).
4. An activity log entry is created indicating the reset.
5. Contract status is reset to *Not Started*.

## Resetting Re-Enrollment for a Student

NOTE: This should only ever be done during testing. If you're doing this after ORE has launched, that's probably a bad thing!

From a Person Enrollment detail screen, click on the Action menu and run the "TESTING ONLY: Reset Enrollment Test Data" procedure. This will do everything listed above in *Resetting a Contract*, plus:

1. Deletes all person charge records created by online enrollment.
2. Deletes all simple receipt records created by online enrollment.
3. Clears the *Complete* flag and *Notes* of any enrollment checklist item that was updated by vc.web or is one of the following system checklist items: *Payment Received*, *Pre-Enrollment Form*, *Enrollment Agreements*, *Contract Complete*, *Family Info Updated*.
4. If the student was withdrawn online, their *Withdraw Reason* is blanked out and their *Not Re-Enrolling* checklist item's *Complete* flag and *Notes* field are reset.
5. An activity log entry is created indicating the full enrollment reset.
6. Clears the Applied Amounts dictated in the Override Amounts tab.

## Putting a Student "On Hold"

When setting the "On Hold" enrollment checklist item as complete, the student's enrollment status and online enrollment status change to "On Hold". The immediate effect is that their enrollment contract is locked. That means parents can't preview it, update it, or sign it. On the home screen, instead of showing a link to the contract, one of two things will be displayed depending on configuration:

- "Enrollment On Hold"
- A student-specific message that comes from the "On Hold Notes" field on the Person Enrollment record

If a school wants to completely suppress a student from online re-enrollment, they need to clear Person Enrollment flag "Portal Open". Doing this for all students a parent has access to will effectively disable online re-enrollment for a parent.

## Taking a Student Off "On Hold"

Check off the "Portal Open" flag on Person Enrollment and un-complete the "On Hold" enrollment checklist item. You do not have to clear the "On Hold Notes".

## Refunding a Family's Deposit

Refunding a deposit can only be done by logging into the school's payment gateway administration interface such as Authorize.Net. There is no capability to issue a refund from within Axiom. When a refund has been issued, the VCA personnel need to adjust their records to indicate the refund. In the Activity Log of a person's enrollment record the entry for Payment Received will contain the order/receipt number. The school can use this number to find the payment in their payment gateway's admin site.

## "Not Eligible" Enrollment Status

Occasionally, when there is a misunderstanding with how a question is worded on a form in the Admissions Portal, it will eventually translate to a student having the "Not Eligible" Enrollment Status, despite the fact that they are eligible. In most situations, the cause of this is a discrepancy in the Grade Applying For, Year Applying For, or Grade Level between the Application record and the Enrollment record.

Should this be the case, double-check with people who can confirm the correct values for each of these, and once the correct information is known, navigate to the student's Application detail screen from their Admissions History, unlock the application if needed, correct the needed values, and click "Update".

## Regular Usage, Maintenance & Upkeep

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This section details regular maintenance and situations that may occur related to upkeep of Online Re-Enrollment.

### Using the Enrollment Log

From the *Person Enrollment* detail you'll see a *Log* tab. This log is a history of everything that happened during the student's enrollment process, by whom, and when. Log event types include:

- Setting the withdraw reason (from the withdraw form)
- Setting the withdraw notes (from the withdraw form)
- Selecting a payment plan (contract)
- Selecting a tuition payment method (contract)
- Opting in or out of optional extras (contract)
- Contract signed

- Contract reset
- Full enrollment reset
- Payment received

Each log entry contains the date and time, the username, and when available, a link to their Person record. Log records can not be deleted or edited by anyone. Only those with SysAdmin and Admissions\_1 security roles are able to see this log.

## Sending Confirmation Emails to Families

For information on sending confirmation emails based on contract completion or online enrollment completion, [click here](#).

## Quickly Enabling/Disabling Payment Plans

Often throughout the course of the year, you will want to disable and re-enable various payment plans at different times. An easy way to do this is to navigate to the payment plans query on the Online Re-Enrollment homepage, clear the value from the "Web Description (Required)" column, and click Update. Because this is required, it will no longer be available once cleared. To re-enable it, re-populate this value and click Update.

## End of the Season Maintenance

At the end of each online enrollment year, schools are strongly encouraged to "Close" the enrollment portal for the enrollment year by using Batch Update on the "Is Portal Open" field to NO. Among other reasons, one important reason to close the enrollment portal is that the "Send Household Enrollment Email" procedure - which can be used to send one-off System emails to a single household, with enrollment instructions, and an auto-login link for enrollment - uses merge fields to personalize the system email which depends on the "Is Portal Open" status.

## Reporting

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This details ways to report on this process.

### Online Enrollment Status Reports (who is where in the process)

From the **Online Enrollment** homepage run the **Find Re-Enrollment** or the **Find New Enrollment** query.

The Online Enrollment Status column indicates where the student is in the enrollment process.

1. **On Hold:** See above.

2. **Not Eligible:** Person is not a student, is missing an enrollment checklist, or has an invalid Enrollment Status and is thus is not eligible to use online enrollment.
3. **Eligible:** Person is allowed to (re-)enroll online but their contract is not yet open because they haven't finished contract prerequisites (policies, profile update).
4. **Contract Open:** All contract prerequisites are complete and the parents are now able to open and complete the contract.
5. **Contract Complete:** All required contract signatures have been received. The contract is complete, locked, and archived.
6. **Paid:** Payment has been received. This status is skipped for schools who do not have a payment checklist item.
7. **Complete:** All online enrollment tasks are complete.

The **Enrollment Completed Date** column can be used to determine when an individual has completed enrollment or re-enrollment. When an applicant or student's enrollment status is updated to Newly Enrolled or Re-Enrolled, the overnight process will populate the Enrollment Completed Date field with the date of the most recently completed, required (re)enrollment checklist item. Schools are able to overwrite this date if necessary.

*The Enrollment Completed Date can also be found on the Person Enrollment Record and on the Admissions and Enrollment Checklist tabs on the Student Detail Screen.*

## Enrollment Reports

On the Online Enrollment Homepage under the Status section there are three categories:

1. "Done" includes reports for Recently Completed Contracts and Recent Payments.
2. "In Progress or On Hold" includes reports for Contracts that are Awaiting Signatures, Missing Required Contract Signatures and Students who are On Hold.
3. "Not (Re-)Enrolling" includes reports for Students who are Withdrawing and new enrollees who have Declined Enrollment.

*Note: The Declined Enrollment report under the (Not Re-) Enrollment category shows all New Enrollments for the current admissions year that have the Enrollment Status of Declined Offer.*

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