

Launching Online Enrollment to Parents

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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.](#)

For instructions for launching online re-enrollment to parents, [click here](#).

Pre Launch

Ensure there are Accepted Applicants for the Current Admissions Year

All New Enrollment queries only return records associated with accepted applicants. If there are no accepted applicants in the system, these queries will come back empty.

Creation of Person Enrollment Records

There is no gap between the time a school accepts an applicant and the time when the system initializes online enrollment for that applicant. The procedure that creates Person Enrollment Records will run as soon as the application status is changed to an option where the category is Accepted.

There is no longer any need for schools to manually run "Create Missing Person Enrollment Records" from the Admissions menu.

Ensure all Parents have proper Access and Permissions

Open the "New Enrollment Access and Permissions" report under Online Enrollment > Launch Prep. Ensure all parents who should be able to access the enrollment portal have some form of Online Enrollment Access. If the school is using the HPU, you'll want to ensure that all parents with standard access have HPU checked off so they can update the applicant's information on the HPU.

Ensure all Accepted Applicant Parents have Accounts

On either the Admissions or System homepage, click on the lightning bolt in the upper right-hand

corner. Create Parent of Applicant accounts by running the “Create Parent of Applicant Accounts” procedure under the User Accounts menu (this action may need to be turned on by your Account Manager). This will create portal login accounts for anyone with enrollment access to an accepted applicant.

*Schools with a rolling admissions process can also use this procedure to create accounts throughout the admission year.

Please Note: Standard access is automatically added for all Parent of Applicant records that are created by an online application submission.

Troubleshooting Account Creation Issues

There are a few data-integrity-related situations which can prevent parent of applicant accounts from being created. These situations should be documented in the “Parent Account Status” field in the Find New Enrollment query. The most common problem occurs at schools where usernames are created from a person’s email_1. If the applicant parent record is a duplicate record of a pre-existing person record, Veracross will prevent a user account from being created because a user with the email-based username already exists in the database (and Veracross does not allow duplicate usernames). For the same reason, user accounts will not be created for people who share an email. The first person processed will get a user account, the second (and following) will not.

If the Find New Enrollments query shows data-integrity problems in the “Parent Account Status” field, you must resolve the underlying data-integrity issues and then re-run “Create Parent of Applicant Accounts” before proceeding.

Sending Enrollment Emails in Batch

Schools can target all parents of newly enrolling applicants via the “All Online Enrollment Recipients” system group. Membership in this group requires a person meets the following four criteria:

- Has enrollment access to the applicant
- The applicant’s enrollment portal is open
- The applicant’s enrollment has an enrollment type of “New Enrollment”
- Applicant’s Online Enrollment Status is one of the following:
 - Eligible – at least 1 contract prerequisite has been met
 - Contract Open – all contract prerequisites have been met
 - Contract Complete – contract has been completed, no further action required from students/parents
 - Complete – the student is considered newly enrolled or re-enrolled

The Veracross system refreshes group membership during the nightly processes. Axiom users can

refresh membership manually using the “Refresh Group Membership” on the main System menu.

This group can be used to send an email to all parents of newly enrolling students.

Schools should use the `{vc:enrollment_link}` merge field within their email to include an auto-login link that parents can use to access the enrollment portal.

Note:

There are 2 additional related system email groups that may also be of interest.

1. “Online Enrollment Recipients In Process” – returns adults that meet the following criteria:

- Has OE access for a student.
- Enrollment Type for student is “Enrollment”.
- Applicant’s enrollment portal is marked as “open”.
- Applicant’s Online Enrollment Status is “(2/4) Contract Open”, or “(3/4) Contract Complete”.

2. “Online Enrollment Recipients Completed” – returns adults that meet the following criteria:

- Has OE access for a student.
- Enrollment Type for student is “Enrollment”.
- Applicant’s enrollment portal is marked as “open”.
- Applicant’s Online Enrollment Status is “(4/4) Complete” and the adult does not have another student whose enrollment status is NOT “(4/4) Complete”.

Sending One-off Enrollment Emails

Configuring the Enrollment Email Template

Schools can send Enrollment Portal welcome emails one family at a time. This email is sent via Axiom and is tied to the “Enrollment” Email Template.

This template accepts the following variables:

- `{informal_salutation_hh}` => example: “Dear John and Suzzy”
- `{salutation_hh}` => example: “Dear Mr. and Mrs. Jones”
- `{first_name}` => example: “John”
- `{nick_name}` => example: “Chip”
- `{enrollment_link}` => auto login link to enrollment
- `{household_pk}` => example: “31353” (Household ID)
- `{grade_level}` => example: “Grade 4”

- {school_year} => example: "2015"
- {school_year_long} => example: "2015-2016"

Sending the Enrollment Email

To send this email to each person with enrollment access to a child, open the child's household detail and select "Send Enrollment Email" from the Admin menu (if this isn't turned on, speak to your Account Manager to turn it on)

If you would like to test the email, use the following strategy:

1. Find a household with parents in it that have no email_2
 2. Move each parent's email_1 to email_2
 3. Put your email in email_1
 4. Send the email via Admin > Send Enrollment Email
 5. Check your inbox
 6. When done, reset parent emails to how you found them
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