

# July 2020 Client Digest

Updated Jul 22, 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 Veracross Product Recent updates have been migrated to the [Product Updates](#) section of the [Veracross Community](#). Please update your bookmarks.



## July 2020

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Summer greetings! As you have been preparing for a variety of reopening scenarios, we have been spending time listening and adjusting our own plans to help you be as prepared as possible for different scenarios. In this month's digest, I'd like to highlight a few recent developments and look ahead to what we have planned in the coming weeks:

- Looking back, in March, we added a "Virtual Meeting URL" field to class records, so you could publish meeting links directly in your portal for easy access. We followed that up by [adding the field to the import type](#), so you can include meeting URLs if you are importing classes. We recently made it faster to [add security roles to multiple](#)

people, and even more significantly, just last week we made the close-school-year procedure entirely self-service

- Looking ahead, we have three big product updates for you: (1) new cohort records to manage in-person/remote learners, (2) a simple COVID screening form, and (3) new academic document publishing workflows.

We remain grateful for the feedback we have received as we have talked with so many of you. If you'd like to connect, please [fill out this form and we'll be in touch](#)



Sincerely,  
Jessica Wallis  
Vice President of Product Management

## New Features Coming Soon

August is shaping up to be a very busy month!

### Cohort Records

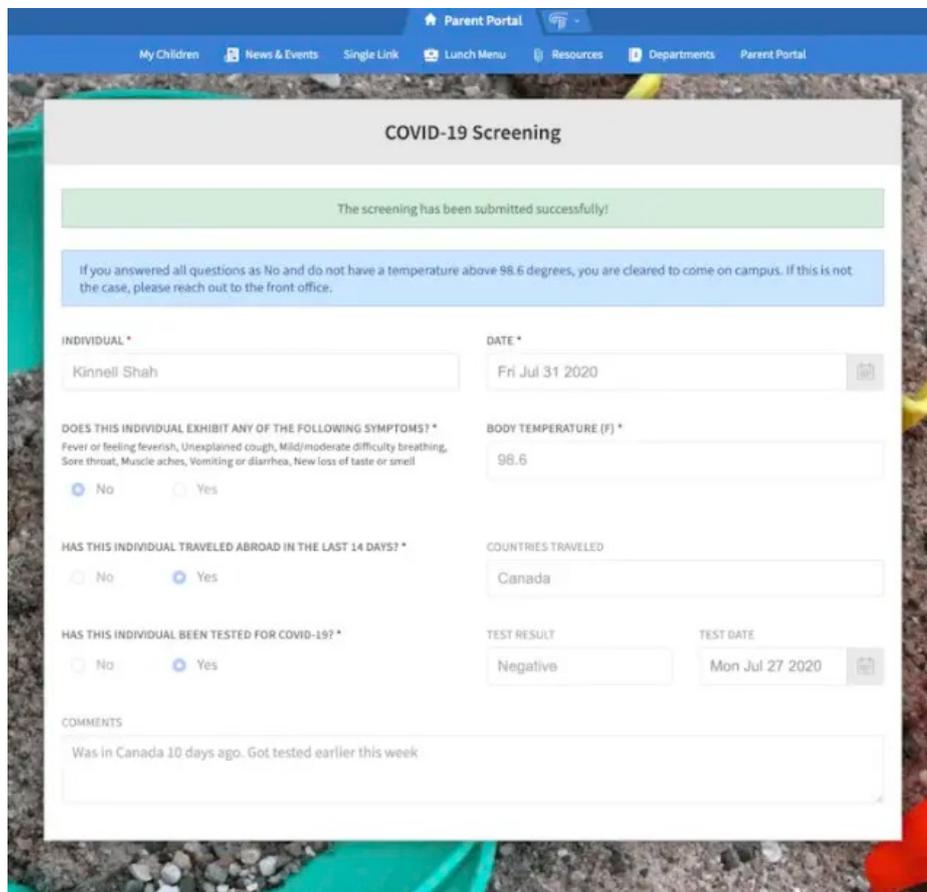
Actually, this feature is available today! In our ongoing effort to help you better manage complex scheduling scenarios this fall, particularly cohorts or pods of in-person and remote learners, we are rolling out a new cohort record type in Veracross. It is a way of modeling the answer to the question, "When will a particular group of students be expected to attend classes in person and when will they be expected to attend remotely?"

[Read more about cohorts.](#)

### Simple COVID Screening Form

Many of you are planning on implementing some sort of health screening form as a prerequisite to returning to campus. In August, we will roll out a simple

screening form you that can deploy in your parent and student portals. Each form will present questions aligned with current CDC guidelines. Keep an eye out for the update in August.



The screenshot shows a web interface for a COVID-19 screening form. At the top, there is a navigation bar with links for 'My Children', 'News & Events', 'Single Link', 'Lunch Menu', 'Resources', 'Departments', and 'Parent Portal'. The main heading is 'COVID-19 Screening'. A green banner indicates 'The screening has been submitted successfully!'. Below this, a blue box contains instructions: 'If you answered all questions as No and do not have a temperature above 98.6 degrees, you are cleared to come on campus. If this is not the case, please reach out to the front office.' The form fields are as follows:

FIELD	VALUE
INDIVIDUAL *	Kinnell Shah
DATE *	Fri Jul 31 2020
DOES THIS INDIVIDUAL EXHIBIT ANY OF THE FOLLOWING SYMPTOMS? * <small>Fever or feeling feverish, Unexplained cough, Mild/moderate difficulty breathing, Sore throat, Muscle aches, Vomiting or diarrhea, New loss of taste or smell</small>	<input checked="" type="radio"/> No <input type="radio"/> Yes
BODY TEMPERATURE (F) *	98.6
HAS THIS INDIVIDUAL TRAVELED ABROAD IN THE LAST 14 DAYS? *	<input type="radio"/> No <input checked="" type="radio"/> Yes
COUNTRIES TRAVELED	Canada
HAS THIS INDIVIDUAL BEEN TESTED FOR COVID-19? *	<input type="radio"/> No <input checked="" type="radio"/> Yes
TEST RESULT	Negative
TEST DATE	Mon Jul 27 2020
COMMENTS	Was in Canada 10 days ago. Got tested earlier this week

*A preview of the COVID screening form.*

## New Academic Document Publishing Workflow

We are rolling out a new way to publish academic documents — generally, report cards and progress reports — at the end of each grading period. This new process gives you significantly more control over how and when you publish your documents to the parent and student portals. You will use this new process when you publish your first progress report or report card in the 2020-2021 school year.

[Read more about the forthcoming academic document publishing workflow](#)

# Updating Pronoun Selection Interface

To make interacting with pronouns more inclusive in Axiom and the household profile update (HPU) in portals, we will update the title of the "Pronoun Override" field to simply "Pronouns."

## Upcoming Veracross Connect Sessions



Veracross Connect is running virtually this year! Check out these sessions coming in July as well as the recordings of [those that have already run](#). All times are EDT (GMT-4).

### Admissions Sessions

- Re-envisioning Your Applicants' Journey (Part 2): Lessons Learned from Spring Virtual Visits  
August 4, 2020 at 11am Eastern Time [Register](#)
- How Durham Academy Designed an Application Process with their Families in Mind  
August 11, 2020 at 1pm Eastern Time [Register](#)
- Re-envisioning Your Applicants' Journey (Part 4): Strategies for Effective Communication in a COVID-19 World  
August 25, 2020 at 1pm Eastern Time [Register](#)

### Fundraising Sessions

- Fundraising and COVID-19 (Part 1): Understanding the Impact of COVID-19 on Your School's Development Revenue  
Aug 20, 2020 1:00 PM Eastern Time [Register](#)
- Fundraising and COVID-19 (Part 2): Using Targeted Outreach to Meet Revenue Goals  
Aug 27, 2020 1:00 PM Eastern Time [Register](#)

[Discover all upcoming sessions](#)

[Discover all recordings](#)

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# Recent Product Updates

In June, we squashed 17 bugs and published 4 enhancements. Here is a highlight of recent product updates. Find them all at [Learn Veracross](#).

- **Virtual Meeting URL Column in the Class Data Import Type:** You may remember that, in response to the COVID-19 situation, we introduced a Virtual Meeting URL field to class records back in March 2020. We've now included a column for this field in the Class Data import type. This value should be the URL of the virtual meeting for this particular class.
- **Self-Service Close School Year Procedure:** This was a big one! With the end of the academic year comes the need to close the school year in Veracross. The "traditional" workflow was that you would review various data questions outlined in documentation, then submit a ticket in our support portal, at which point our engineers would run a series of scripts that closed the year. Indeed, many of you have already completed this process for the 19-20 school year. But now, we have a new self-service "close school year" procedure accessible right in Axiom. This means that you can close your own school year in Veracross.
- **"Obsolete" Flag on Alternate Block Schedules:** In our ongoing effort to help schools better manage complex scheduling scenarios this fall, we've added the ability to mark alternate block schedules obsolete. This enhancement allows you to simplify your list of active alternate block schedules and reduce time spent scrolling through the dropdown when applying an alternate block schedule.
- **Adding and Removing People To and From Security Roles:** Adding and removing security roles isn't generally a daily task, but when it comes up, you now have the ability to expedite the process in Axiom. Navigating to an individual's security admin detail screen is still the best way to modify an individual user's security roles, but you now have the ability to add and remove people to and from a security role directly on the security role detail screen. This can be handy if you have lots of new faculty to give new faculty security roles or a similar task.

## Veracross University: New Content Available

We recently added a new **Accounts Payable** learning path.

We currently have **41 live sessions** scheduled next month. Led by Veracross instructors, these sessions typically run 30 minutes and are interactive, so bring your questions and ideas to share. They are intended to extend the "how-to" video-based learning, so they focus on workflows and "connecting the dots" among areas of functionality.



[View All August Live Sessions](#)



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