

November 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.



November 2020

In This Issue

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It's hard to believe that the calendar year is coming to a close and that online re-enrollment (ORE) is already on the horizon! We know how important strong enrollment is for your school – especially this year – and encourage you to review the following resources as you plan your online enrollment strategy:

- An "ORE quick start guide" that includes video walkthroughs of the key steps.
- A new "Online Enrollment" learning path in Veracross University.
- A number of live sessions in December in Veracross University about online enrollment.

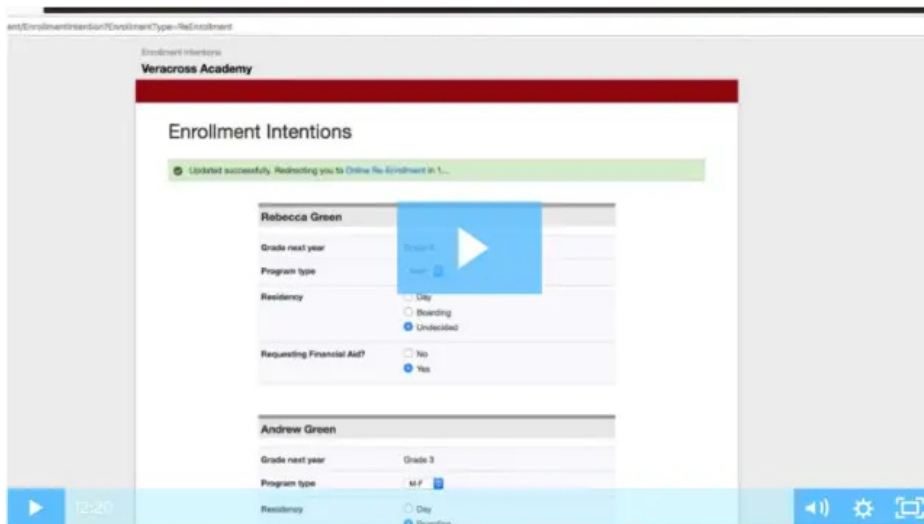
In addition to more details about the above resources, in this digest you will also find webinars and recent/upcoming product releases highlighted. We wish you a safe, productive, and (hopefully by the end of the month, at least!) restful

December!



Sincerely,
Caitlin Parker
Director of Support

Online Re-Enrollment: Need a "Tune Up"?



Online re-enrollment (ORE) is a significant event that impacts your entire school. Because it is also one that typically only rolls around once a year, we want to provide you a quick-start guide for tuning up your configuration and making sure you are ready to launch ORE to parents.

We recommend breaking down your process into several steps:

1. Reacquaint yourself with how ORE works.
2. Agree upon key deadlines, the most important of which is your launch date.
3. Communicate key dates and any major changes to your account manager at least four (4) weeks before your intended launch date.
4. Run the "Start Re-Enrollment" procedure.
5. Run through ORE with a few test cases and take notes on needed updates.
6. Review and update configuration.

7. Thoroughly test.
8. Launch ORE to parents.

This "ORE Tune-Up Quickstart Guide" has several videos and all the checklists you'll need to go through in the coming weeks and months.

[View the ORE Tune-Up Quickstart Guide](#)

If you will be implementing online enrollment for the first time this year, your implementation or account manager will be in touch with you.

To support you in online enrollment, we have two offerings in Veracross University:



- A new "Online Enrollment" learning path
- A number of upcoming live sessions in December covering online enrollment setup and configuration, as well as integration with the business office.

[View the OE Learning Path](#)

[See Upcoming Live Sessions](#)

The Online Enrollment learning path requires a login that is separate from your regular Veracross account. Don't have a login? Reach out to your Veracross point person at your school. Still stuck? [Email us](#) and we'll get you squared away.

Recent Product Update Highlights

This month, we rolled out 31 enhancements and squashed 37 bugs. Here are some recent highlights of new features.

Add Multiple Candidates on an Inquiry Form

The image shows a screenshot of a web form titled "Inquiry Life" for an admission process. The form is set against a background of a school campus with green hills. At the top, there is a logo and the text "Inquiry Life". Below that, a message says: "Thank you for your interest in [INSERT SCHOOL NAME]! Please fill out this form and we will be in touch to discuss the next steps in the admission process." The form is divided into sections: "Candidate Information" and "Parent Information". The "Candidate Information" section includes fields for "FIRST NAME *", "MIDDLE NAME", "LAST NAME *", and "SUFFIX" (with a dropdown menu set to "-None-"). There is also a "PREFERRED NAME" field. Below these are radio buttons for "GENDER" with options "Male", "Female", and "Gender Non-Conforming". There are three dropdown menus for "CURRENT GRADE", "GRADE APPLYING FOR *", and "YEAR APPLYING FOR *", each with a "Select One" label and a small "x" icon. At the bottom of the form, a red arrow points to a button labeled "Add Another Candidate".

If you are using our new Admission Portal 3 platform, you will be excited to see that we have added this parity feature: the ability to add multiple prospects to a single inquiry form, streamlining the process for families with multiple children applying to your school.

[Read the full update at Learn](#)

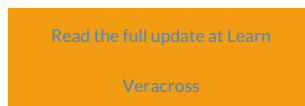
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VC Pay AutoPay Batch Integrity

INTEGRITY REPORT					
Integrity Checks - Batch Item		Integrity Checks - Invoice		Integrity Checks - Batch	
Integrity Checks - Ignore					
Integrity Type Info					
	Category	Integrity Type	Last Modified	Record Count	
▲ Critical (1 record)					
	Reminders	No reminder email sent	10/20/2020	<u>1</u>	
SUM				1	
▲ High (1 record)					
	Reminders	Batch Item modified after initial reminders sent	10/20/2020	<u>2</u>	
SUM				2	
▲ Medium (2 records)					
	Reminders	Checked off Resend Reminder Email flag but did not run Resend Reminder Notifications menu item	10/20/2020	<u>2</u>	
	Amount	Contains both an override amount and pending payments	10/21/2020	<u>3</u>	
SUM				5	
▲ Low (2 records)					
	Amount	AutoPay amount is "significantly" greater than other amounts in batch	10/21/2020	<u>1</u>	
	Amount	Large overdue amount	10/20/2020	<u>2</u>	
SUM				3	

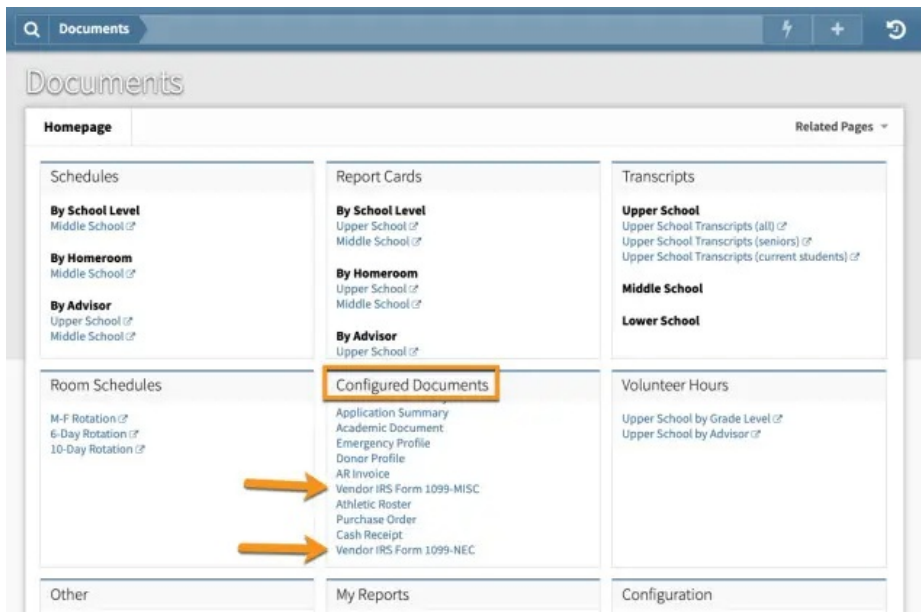
We rolled out AutoPay batch integrity checks that allow you to review potential data issues or constraints that need to be resolved on the back end or by contacting parents prior to approving the AutoPay batch.

Want to learn more about AutoPay batch integrity? Check out [the live session recordings in Veracross University](#).



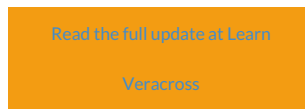
Not using VC Pay but interested in learning how it streamlines tuition management for parents and your business office? Contact [Don Humpton](#).

1099 Functionality Now Supports New IRS Requirements

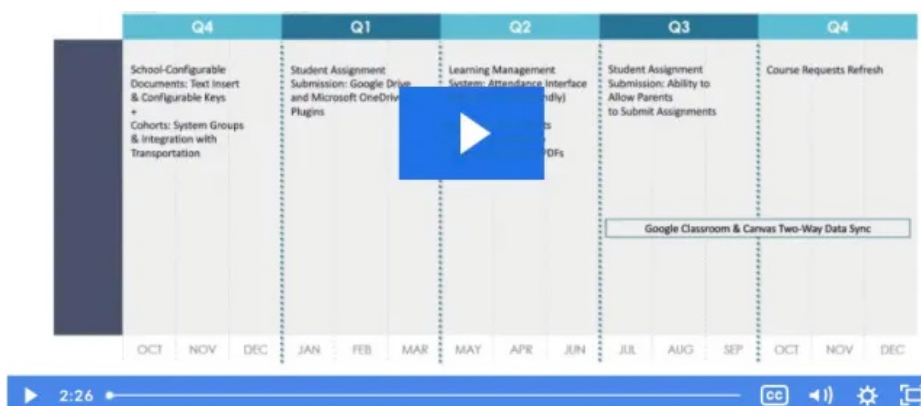


We updated our 1099 functionality to support the new IRS requirements for 1099-MISC and 1099-NEC.

Want to learn more about 1099 functionality? We have *two live sessions coming up in December* in Veracross University.



Product Roadmap



We released our updated product roadmap, presented in a series of videos for each major product area.



Read the full update at [Learn](#)

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Upcoming Webinars



We hope you can join us for these webinars! All of our upcoming and recorded webinars are available at [Learn Veracross](#). Here is what's coming up soon:

Going Digital: Three Ways to Target Prospects and Increase Conversion

Dec 8, 2020 01:00 PM Eastern— Register now

With open houses, tours, and in-person events no longer a viable option, many schools are looking to digital marketing methods to engage prospective families. Attend this webinar to hear Brian Stith, executive director of marketing and admissions at Carmel Catholic High School (Mundelein, Illinois) describe how his school's implementation of a digital strategy has not only sustained enrollment during the COVID-19 pandemic but over the past ten years led to:

- *Increased student ethnic diversity by 59% (2008 - current)*
- *Increased non-traditional (non-Catholic student enrollment) by 42% (2008- current)*

The Next Normal: Student Health and Risk Management in 2021 and Beyond

Dec 10, 2020 01:00 PM Eastern — Register now

From our friends at Magnus Health: Independent schools developed a wide range of reopening plans this fall and determining the

"right" answer for each school was highly individualized. Now, as we begin moving into enrollment season and budgeting discussions, while there is still no single "right" answer, schools are still required to translate learnings from this fall into strategic plans for the spring and beyond.

Please join us as we reconvene the three panelists from our June webinar "Student Health in a CV-19 World" where they will share lessons learned from the strategies they implemented this fall, as well as implications for the spring and beyond.

This webinar will cover:

- Lessons learned from return to school in 2020
- Implications for spring 2021 and next school year
- Approach to planning, strategy and budgeting for 2021-2022

Developing a Cinderella Strategy: Finding Dollars and Donors in Unlikely Places

Dec 15, 2020 01:00 PM Eastern – Register now

*With many schools anticipating a budget deficit and significant increases in financial aid awards, advancement offices are being asked to close the gap. Attend this webinar to hear Graham Honaker and Jerry Logan, authors of *The Cinderella Strategy: The Game Plan Behind Butler University's Rise to Prominence*, describe how Butler's innovative and counter-cultural approach to fundraising grew the school's endowment by \$100 million, and nearly doubled its average annual giving.*



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