Blackbaud Enrollment Management System

Base Implementation - Go Live Planning Guide

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The go-live planning guide is intended to aid Admissions Managers in launching their Enrollment Management System post-implementation. It can be used to plan for the system's launch, to identify any outstanding *homework items* that need to be addressed before launch, and as a resource for onboarding new employees or yearly setup review. In addition, the guide will help eliminate some of the *gotcha's* that may occur during the first weeks of system implementation. Remember that our Customer Support team is ready to help with any issues or questions that may arise!

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Core

Platform managers need to configure options in Core to enable features like drop-down menus for user profiles. To do this, navigate to: *Core > Settings > General Settings > Table Values*.

- Languages
- Citizenship
- Grade levels

Core > Users > User profile settings

- Ethnicity types
- Religion types
- Relationship Types
- Race types
- User name formats
- Gender
- Pronouns

Candidate Profile Settings (Table Values for Enrollment Management)

An admission manager can edit options for various fields used on candidate profiles and checklists. Manage the options from *Enrollment management > Admissions > Admissions setup > Candidate Profile Settings*.

School Branding

Platform managers can control the primary and secondary colors, logo, and logo link within the app. When you choose primary and second colors, they're automatically broken down into five shades throughout the app.

- Update site color settings
- Update app icons and logos
  - **Banner Logo** – must be a PNG file with a max width of 360 pixels and a max height of 60 pixels.
  - **Notification Banner** – must be a PNG file with a max width of 1280 pixels and a max height is 320 pixels.
  - **Homescreen Icon** as a homepage app for mobile phones must be a PNG file sized 152 x 152 pixels.
  - **Homescreen Icon Short Name** – This is the text a user will see under the Homescreen Icon after creating a shortcut (ex: your school's name). There is a 12-character max.
  - **App Favicon** – Images must be in ICO format. The image should be sized at 64 x 64 pixels.
- Set logo URL

Blackbaud ID

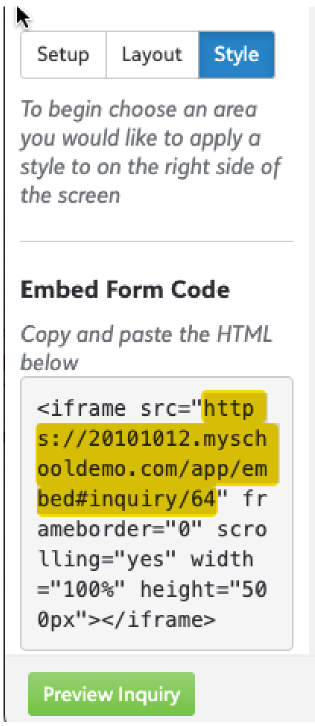
Blackbaud ID allows each user at your school to access Blackbaud products seamlessly. To update the invite sent during the admissions process navigate to *Enrollment management > Communication > Notifications > EMS User Invited to BBID*. For detailed information on how BBID integrates with EMS refer to the EMS K12 BBID Communication documentation. Additionally, you can connect users to BBID via Core. To update the invite sent from Core navigating to *Core > Communication > Notifications > Blackbaud ID Invite*.

Inquiry Forms

- [Blackbaud Recommendations for Building Inquiry Forms]()
- To create or edit an [Inquiry Form](), navigate to Enrollment management > Admissions > Admissions setup > Inquiry forms. For more information on Creating and Editing Inquiry Forms [click here]().
- While in Edit mode, click the Preview Inquiry button on the lower left-hand side of your screen to see the final layout.
- Update/Add any content within the existing inquiry form, including adding or removing any fields.
- Create/complete Confirmation Notification (External to Parent)
    - Enrollment Management > Admissions > Admissions setup > Inquiry forms > click **Settings** next to the Inquiry.
- Create/complete Administration Notification (Internal – Selected School Users)
    - Enrollment Management > Admissions > Admissions setup > Inquiry forms > click **Settings** next to the Inquiry.
- Create any additional inquiry forms as needed, whether internal for the school to complete or external for publishing.
- **REMINDER:** inquiry forms, application forms, contracts, and school forms cannot have fields added or removed when data is associated with them.

Inquiry Embed Code

To [obtain the embed code for the inquiry form](), navigate *to Enrollment Management > Admissions > Admissions setup > Inquiry forms > Edit >* **Style button** (left-hand side). If you only want a link to the form, copy the highlighted section as shown in the sample below.

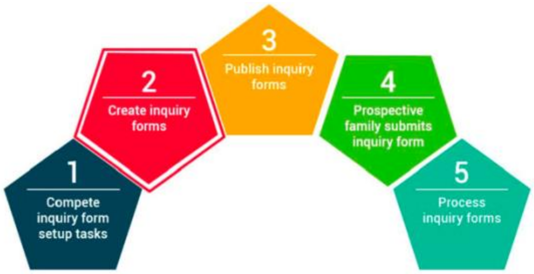


Consider creating multiple inquiry forms:

- Publish one inquiry form on your school's website for prospective families to complete online
- Create a simpler inquiry form for staff members to complete when prospective families call or visit your admissions office

Don't forget to test! Submit new inquiry forms with test data to ensure that they display correctly, and to confirm that the email notifications are worded appropriately.

Creating Inquiry Forms Flow



Application Form

- Blackbaud Recommendations for Building Applications
- To create or edit an Application Form, navigate to Enrollment management > Admissions > Admissions setup > Application forms. For more information on Creating and Editing Inquiry Forms click here.
- While in Edit mode, click the Preview Application button on the lower left-hand side of your screen to see the final layout.
- Update/Add any content within the existing application form, including adding or removing any fields.
- Create/complete Confirmation Notification.
  - Enrollment Management > Admissions > Admissions setup > Application forms > click **Settings** next to the Application.
- Create/complete Administration Notification (Internal)
  - Enrollment Management > Admissions > Admissions setup > Application forms > click **Settings** next to the Application.
- To obtain your application URL navigate to Enrollment Management > Admissions > Select Admissions Setup > Select Application Forms > click **Login Setup.**
  - Copy the URL from the Apply Link section in the Login Setup
  - Consider adjusting your application fee to $1.00 and submitting a test to ensure your payment processing works. When testing is completed, don't forget to change the fee back to the correct value.
- Fee Waivers – You can enable a waiver code if certain users do not have to pay the application fee.

Once you create an application form, you can publish it to families. Families will only see an application form if:

- The form is active.
- The current date falls within the form's publish date range.
- The candidate's entering grade matches one of the grade levels that are associated with the form.

Note: If there are multiple application forms a family could see, ensure your application form names are clear.

Creating Application Forms Flow

Application Fee

- To process application fee payments, your school must create a Blackbaud Payment Services (BBPS) account and a Blackbaud Merchant Services™ (BBMS) account. BBPS is Blackbaud's PCI-compliant vault used to securely store payment data.
- You can establish a default fee amount on each application form. However, in the **Fees Rules task**, you can create rules if certain families should be charged a different amount.

Candidate Progress Text & Admissions Decision Text

- Update your Candidate Progress Text
  - The Admissions Progress page displays a message when prospective families sign into the community. Your school can customize this message in the Candidate Progress Text task. This could include:
    - A welcome message
    - Links to FAQs
    - Admissions office contact information
    - Event information
  - **Note**: This text is universal and cannot be customized by the school or grade level.

- Update your Admissions Decision Text
  - Before your school has published decisions, the Decision page displays a custom message. Your school can edit this in the Decision Text task.
  - The admission decision text will appear on the decision tab when a candidate has no school decision, or the school decision has yet to be published.
  - You can use this message to outline the decision timeline, or if you don't publish decisions online you can use this message to explain how decisions are announced.
  - **Note**: This text is universal and cannot be customized by the school or grade level.

Checklists

Candidate checklists contain all the tasks prospective families must complete during the admissions process. You can choose from various step types based on functionality when building checklists. You can select a step type, if necessary, when adding a step to a checklist. Adding a step type will enable additional functionality. There are currently 18 available step types.

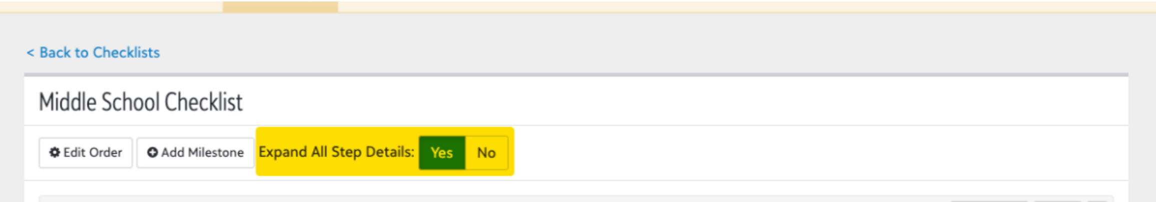
It is best practice to add the checklists to your test candidate and view it from a parent's perspective by impersonating the parent of your test candidate. Click here for more details on how to add a checklist to a candidate.

To create or edit a candidate checklist, navigate to **Enrollment management > Admissions > Admissions setup > Checklists.**

- **Establish Initial Settings -** You must enter the **checklist name** and determine if the checklist is **active or inactive**.
- Statuses – these define what milestone a candidate can have throughout the admissions process.

- Steps – checklists contain a series of steps that provide prospective families and your admissions office with a to-do list. You can associate steps with a **step type** to enable additional functionality. There are 20 available step types.
    - How does the Online Transcript Request checklist step work?
    - What is the difference between Recommendation and Online Recommendation?
    - How do I add Miscellaneous File Types to select when using the Miscellaneous File step on a checklist?
    - **Name Pronunciation** – you can create a checklist step for name pronunciation. Adding it allows the candidate or the parent of the candidate to record their name. For a parent to record a candidate's name, the Parent of Candidate role must have Name Pronunciation **Edit** access for the Candidate role under **Core, Security, Profile access, Profile relationships access.**

- Milestones – allow you to group checklist steps into different phases of the admissions process.
- Step Description - optional but provides the candidate parent additional detail. Enable the "Expand All Step Details" option, and they will automatically see the step description.



Process Inquiry and Application Forms

After a prospective family has submitted an inquiry, admissions managers and staff must process the inquiry from *Enrollment management > Home > Inquiries*.

After a prospective family has submitted an application, admissions managers and staff must process the application from *Enrollment management > Home > Applications*.

- Enable the **Create New User Account** to create a new user in the database or select **Update existing user account** to merge the records in the database.
    - **Check for duplicate users**: If the prospective family submitted information on an inquiry or application form that matches an existing user in your database, you should review the accounts and determine if they should be merged or remain separate.
    - **Create a new user account:** If you determine that the prospective family does not already exist in your database, you can create a new user account.

- When processing Applications, Inquiries, or Event Registrations. You have access to **Edit Users**, enabling you to modify user information entered on the form. A list of users appears on the left, and each can be selected to change data like **Prefix**, **First Name**, **Home Phone**, **Data of birth**, and more.

Enrollment Contracts

To create or edit a contract, navigate to **Enrollment management > Admissions > Contracts > Manage contract forms.** Review/Update the following within the body of the contract. There are various elements and blocks you can add to your contract.

- **Student** - show information about the candidate/student (including first name, last name, grade, date of birth, and entering year)

- **Special Consideration** - show any Special Contract Text. This text is based on information that (re)enrollment managers enter in a candidate's/student's profile.

- **Fees Schedule** - enter fees that will appear on the contract (such as tuition or graduation fees)
  - For Tuition Management, integrated contracts fees pull in from your Tuition Management account.
  - Financial Aid - in the Fee Schedule block, select **Yes or No** to display or hide the financial aid information on the contract. For Tuition Management integrated contracts, you must add the Financial Aid to the contract template

- **Payment Plans** - select which payment plans are available on the contract.
  - For Tuition Management integrated contracts, payment plans pull in from your Tuition Management account.
  - Tuition Insurance – you can determine if tuition insurance is optional or required for each payment plan.

- **Deposit Options** - enable constituents to pay the contract deposit. This block appears in the deposit section by default. The deposit section only appears for families if the block settings are established.
  - For Tuition Management, integrated contracts, a deposit is applied towards tuition and fees and will reduce the amount due. If you have a registration fee that is in addition to your tuition and is due at the time of contract submission, you should use an enrollment fee.

- **Policy** - enter text for the contract policy.
  - You can use the policy block or various text and header elements for your contract context and policy. Each text element has a max of 4,000 characters.
  - You can use multiple text elements throughout the contract, but the policy block can only be used once.

- **eSignature** - requires constituents who are responsible signers to enter their signature. Click on the Block Settings to customize the following:
  - *Agreement Text* – must be acknowledged before a parent views the contract.

- If **All Signatures Required** is selected, each responsible signer must log into their respective accounts to sign before the contract is fully submitted. There can only be two responsible signers for Tuition Management integrated contracts.

- **Create/Complete Remind Notifications – *if needed.***
    - *Enrollment Management* > *Contracts* > *Manage contract forms* > Click **Settings** next to the contract. The reminders are sent at midnight based on the due date of the contract and the frequency of the reminder.

- **Create/Complete Confirmation Notification**
    - You can set up an email notification ("Online Contract Submitted - Administration") to alert the school when a family submits their contract.
    - Additionally, you can customize the confirmation emails ("Online Contract Submitted" and "Online Contract Processed") that are sent to a family when they submit their contract and when their contract has been processed.
        - *Enrollment management* > *Communications* > *Notifications*
        - Select **Filter** > **ReEnrollment** from the **Categories** > **Apply filters.**
        - Click on the **ellipsis** and select edit next to the notifications

Additional Contract Resources

- Publish Contracts
- Generate Contracts
- Contracts in Profiles
- Process Contracts
- Contracts List
- Bulk Record Financial Aid
- Editing Contract Values for a Student
- Tuition Management Integration

If using Tuition Management integrated contracts, this video gives you an overview of the parent experience. It is a bit outdated but gives you a general idea.

Internal Candidate Notes

When it comes to admissions, there are lots of calls, conversations, and observations that need to be tracked along the way.

- **Internal Candidate Notes** gives you dedicated space to keep your thoughts, notes, and whatever else is needed.
- From the **Candidate Record** tab, there is a **Internal Notes** area where you can add your freeform details. Add a **Title**, **Note type, Date**, and **Details**, which display in chronological order and who created it at a glance.
- If you want to customize your notes types, go to **Admissions Setup > Candidate profile settings** and then edit the **Internal Note Types** section to create your own. You can also deactivate, delete, and reorder them around as well.

Enrollment Management Official Notes

You can compose Enrollment Management Official Notes to communicate with current candidates, incoming students and past candidates. Because official notes are associated with a candidate's record, admissions staff can use them to track all communication with a candidate's family. You can also use official notes to annotate the records of past candidates.

- **Initial Contact:** The first interaction prospective families have with your school, usually with the admissions office.
- **Subsequent Communication**: Once a prospective family decides to apply, consistent, clear, and helpful communication every remaining step of the way.

You must establish initial settings and manages communication. This includes but is not limited to

- Official Note Notifications
- Official Note Types
- Official Note Templates
- Monitoring Teams
- View & Compose Official Notes

Admissions Management (Day-to-Day Processing)

- Create New Inquiry **–** you can complete an inquiry form for a prospective student/family. If a family calls the admissions office, the inquiry data can be manually collected/entered.

- Create New Candidate **–** you can create new candidates by turning an existing constituent (e.g., a sibling already in the database) into a candidate. You can also attach a new candidate to a constituent already in the database (e.g., parents of an existing student).

- Candidate Lists - you can use the Candidates List to search for candidates using specified criteria, such as all candidates who have requested financial aid, were wait-listed, or applied to a certain grade.
    - Candidate lists can be saved for future use after you adjust a list to show only the information you want.
    - Select Export to download a comma-separated value (.CSV) file of the list.

- Enroll & Inactivate Candidates
    - After a **candidate is admitted**, you must **enroll them**. The user's role changes from Candidate to Incoming Student (future school year) or Student (current school year)
    - When a **candidate does not complete** the admissions process or is **denied admission**, the next step is to **Inactivate**. Inactivating a candidate changes the role from Candidate to Past Candidate. This does not remove any admissions profile data from the user.

- Re-Apply & Re-Activate Candidates - you can Re-Apply or Re-Activate a candidate. These tasks most commonly occur when a candidate declines acceptance or drops out of the process and ultimately decides to attend.
    - **Re-Activate** - if this decision occurs in the same school year, the candidate is re-activated.
    - **Re-Apply** - if the decision occurs in a future school year, the candidate must be re-applied.

Potential Duplicate Users

During enrollment and admissions season, consider reviewing potential duplicates more often. Individuals with matching names, email addresses, or wireless phone numbers are automatically considered potential duplicate users. For each set of possible duplicates, the name of the newer user and the date the user was created appear in a column on the left. *Core > Users > Potential duplicate users*.

Handle Profile Changes

Platform managers and contact card managers should regularly review data changes made to user profiles. The report is an audit history of all profile changes that user's made themselves and that other managers made on their behalf. Changes in the report already appear on user profiles. *Core > Users > Handle profile changes.*

Much of the data that populates the Candidate Profiles originates from prospective families. However, each family is likely to provide information differently.

For example, some families may enter “Avenue” while others enter “Ave.”

Even within your own admissions office, one staff member may enter a phone number with dashes while another uses periods. It is important for you to establish standards for how you want the data to appear, document those standards, and communicate those standards to everyone who works in your office.

Useful Links

- EMS Roles & Responsibilities - most employees responsible for updating user profile data should have the contact card manager role instead of the platform manager role.
- Overview: Admissions Process
- Admissions Set Up
- Admissions Management (Day-to-Day Processing)
- Annual Procedures - Platform Managers must complete several tasks each year to successfully close out the current year and prepare for the upcoming year. Depending on which modules are used at your school, some of these tasks may not be applicable.

Enrollment Management System Features

- Admissions Events Management
- Admissions Reports
- Admissions Scheduling
- Candidate Lists
- Committee Review
- Communications
- Financial Aid
- Enrollment Contracts
- School Forms
- Student Checklists

Helpful Blackbaud Support YouTube Videos

- What are Student Checklists?
- What is Self Scheduling?
- What is Events Management?
- Committee Review: Setup and Creating Committees
- Committee Review: Reviewing and Submitting Feedback
- Online Recommendations: Using Candidate Recommendation Forms
- Online Recommendations Creating a Ratings Matrix

Additional Resources

Blackbaud Support - our Customer Support team is ready to help via chat.

- Knowledgebase
- Education Management Help Center
- 1.800.468.8996, option 1 (Phone Directory).
- Status Page

BlackbaudU Campus

Blackbaud University's Training Central system is now BlackbaudU Campus. Improve your organization with Organizational Best Practices workshops and take advantage of our *Basics* eLearning, free to all customers.

Blackbaud K-12 Community

The Community is a place for members to connect, share best practices, and support each other in a peer-to-peer based ecosystem of good.

K-12 Idea Bank

Post suggestions for future product updates, vote and comment on others' ideas. Ideas that gather a lot of votes are reviewed by our product managers, as we value each organization's unique insight.

On-Demand Resource Library

Your customer success team has developed content designed to empower you to use your Blackbaud products to their fullest potential.

Subscribe to "What's New"

To receive email notifications when the What's new update appears, make sure to subscribe to the K-12 community's blog by logging into the community site and selecting the **Subscribe** button.

To manage your community subscriptions:

1. Log into the community and locate your name and profile picture in the upper right corner.
2. Select the drop-down arrow and select **My Account.**
3. From the My Account page, select the **Subscriptions** tab and scroll down to the **Blogs** section.
4. Locate **Blackbaud K-12 Education solutions Blog**. If you want to be notified as soon as the What's new content goes live on the community, select the **Instant** option. You can also opt for **Daily** and **Weekly** notifications.
5. Scroll to the end of the page and select **Save changes**.