

# Admissions Process in FACTS SIS

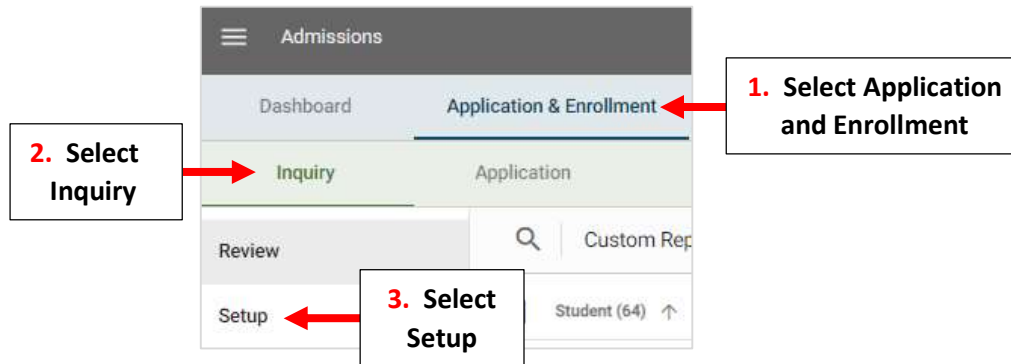
**\*Please Note: New School Year MUST be Created before Starting Admissions for the New Year\***

The following guide will walk you through the process of:

1. Setup of Inquiry Form for New Year      Pages 1 - 3
2. Copy Application Packet                    Pages 4 - 7
3. Copy Enrollment Packet                    Pages 8 - 12
4. Importing a New Application              Pages 12 - 17

## 1. Setup Inquiry Form for New Year

Once logged into FACTS please select **Admissions > Application and Enrollment > Inquiry > Setup**

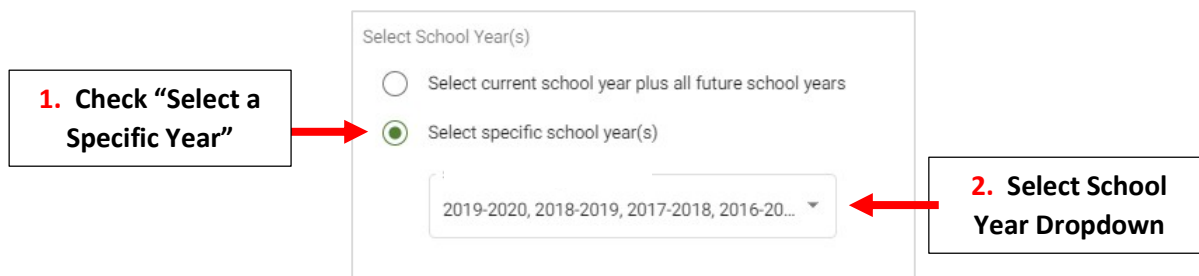


Inquiry Setup is divided into three distinct areas:

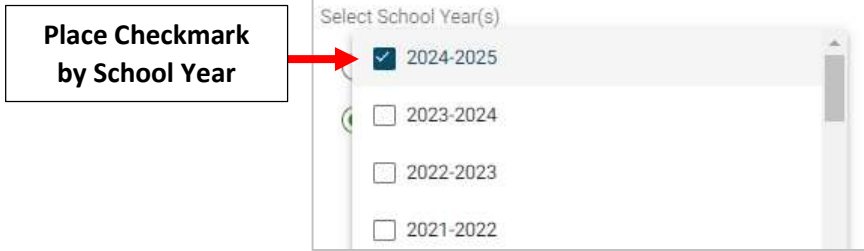
1. Inquiry Settings to select which grade levels to collect inquiries for, or copy the form URL to publish on your school website.
2. Inquiry Form allows you to customize the text and questions on your form so you ask the right questions, every time.
3. Inquiry Submission allows you to customize the submission email, setup email notifications to notify your admissions staff, and more.

### 1. Inquiry Settings

Scroll down to **Select School Year(s)**. By Default, all School Years are available for Inquiry, Check **"Select a Specific Year"**. Select **School Year** Dropdown



Place a **Checkmark** by School Year to allow for Inquires to be Submitted



Place Checkmark by School Year

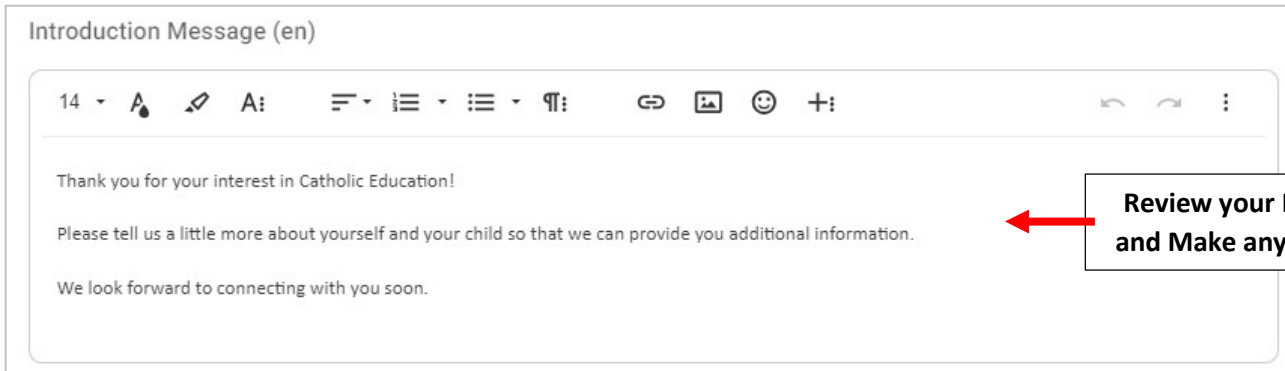
Select **Save** to **Save** your Changes



Select **Save** to **Save** your Changes

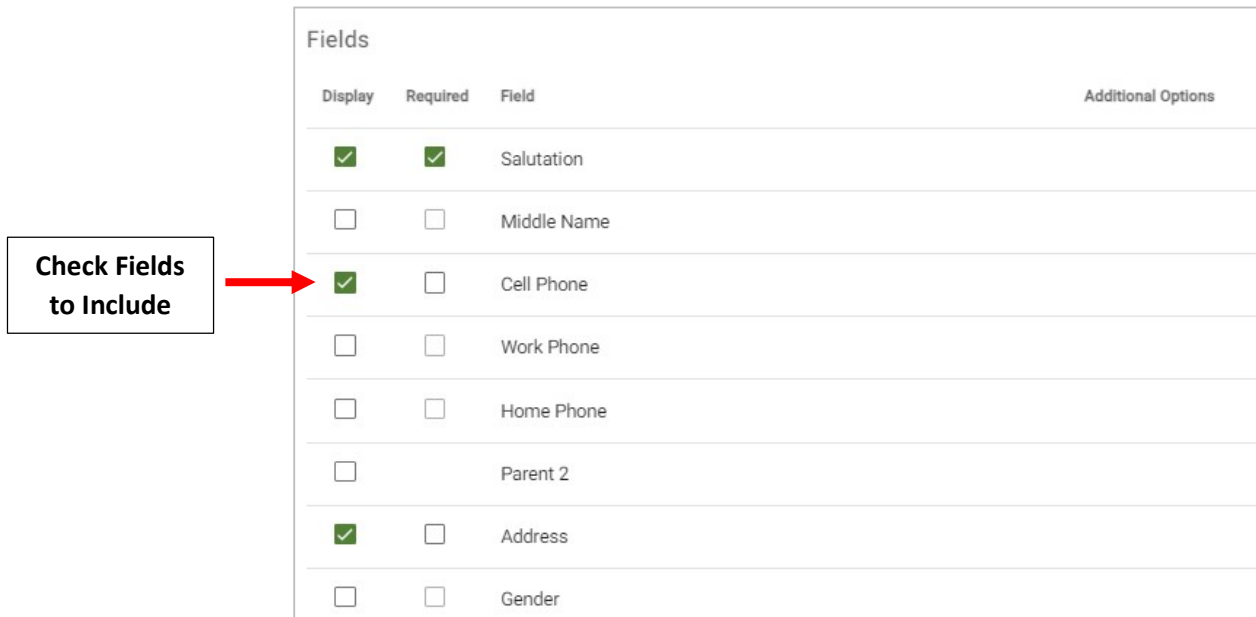
2. Inquiry Setup

**Review** your Introduction Message and make any Changes



Review your Message and Make any Changes

Check **Fields** to Include



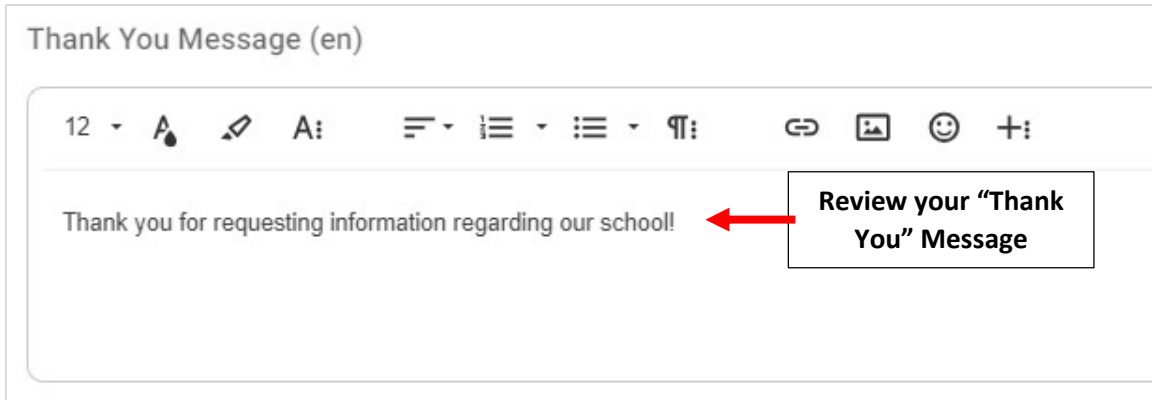
Check Fields to Include

Select **Save** to **Save** your Changes

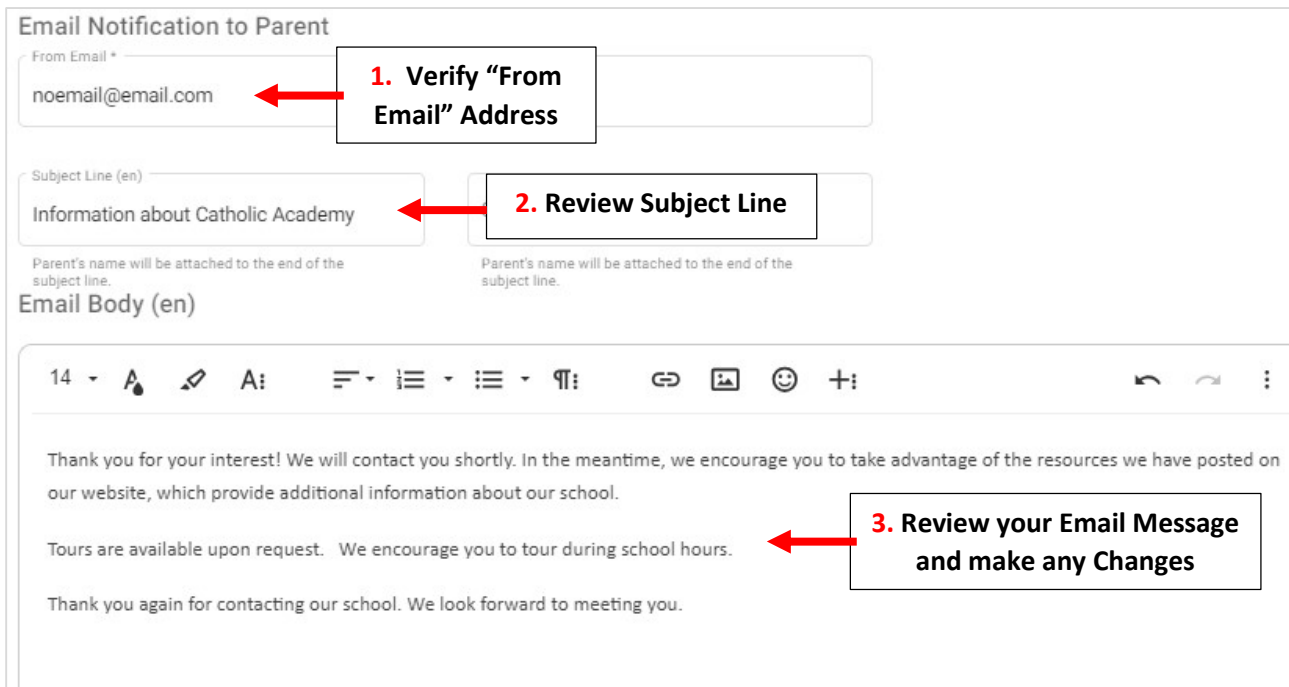


### 3. Inquiry Submission

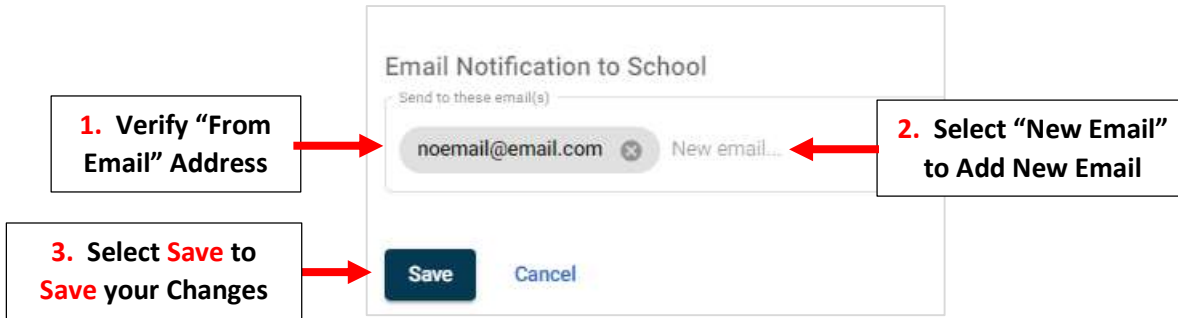
Review your **“Thank You”** Message and make any Changes. This message will be sent when a Parent **Submits** and Inquiry



Verify **“From Email”** Address and **Subject Line**. Review your **Email Message** and make any Changes

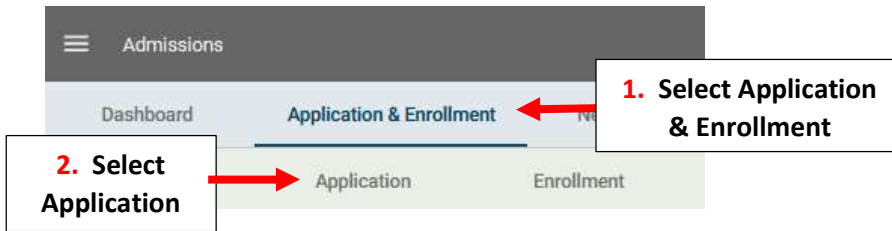


Verify **Email Address** Inquiries will be Sent To. Select **"New Email"** to Add New Email. Select **Save** to **Save** your Changes

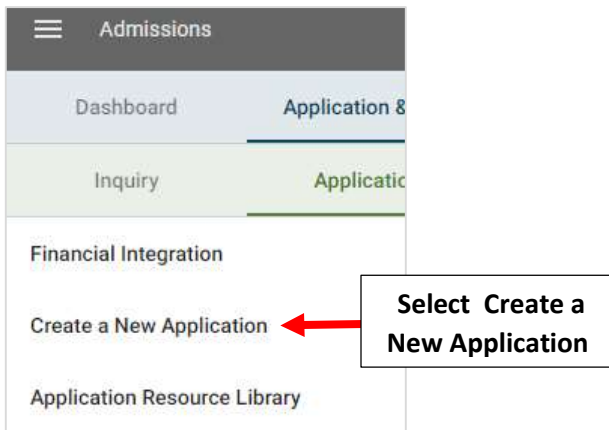


## 2. Copy Application Packet

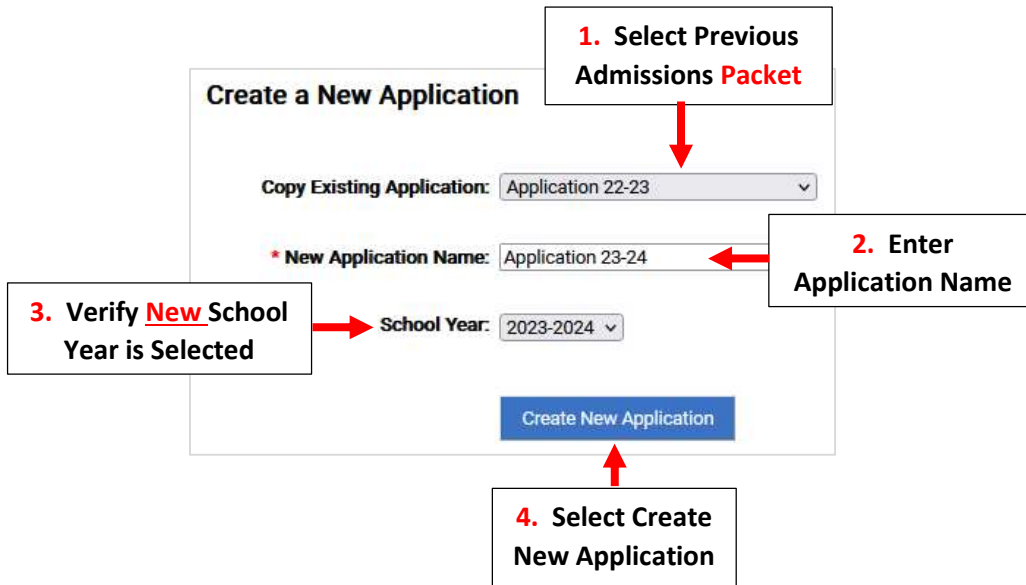
Once logged into FACTS please select **Admissions > Application and Enrollment** and Select **Application**



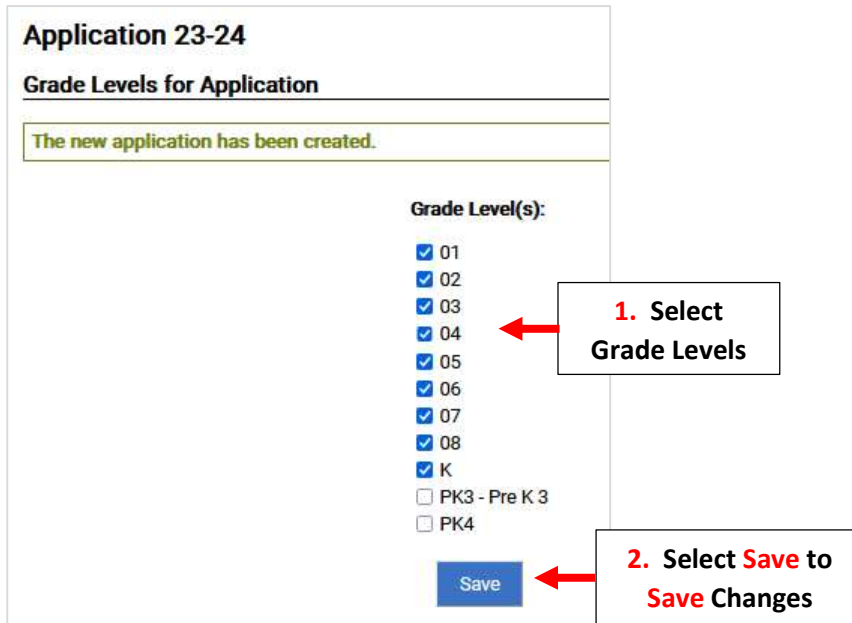
Select **Create a New Application**



Select **Previous Year's** Admissions Packet under **Copy Existing Application** Dropdown. Enter **New Application Name**, Verify **New School Year** is Selected and Select **Create New Application**



Select **Grade Levels** to Include in Application and Select **Save** to **Save Changes**

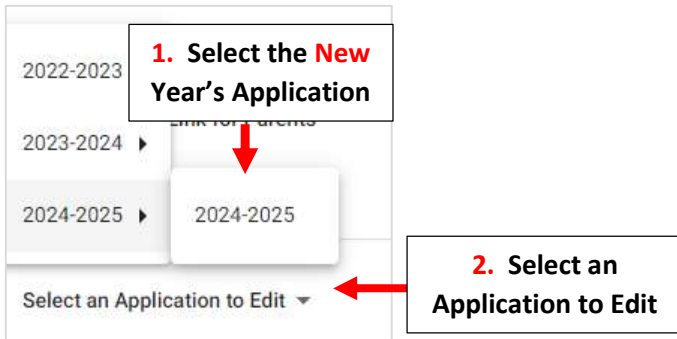


**\*\*Please Note: To Access Application it Must First be Turned "ON"\*\***



You will now need to Update the Instructions and Resource Form.

Select an Application to Edit and Select the **New Year's** Application you Created



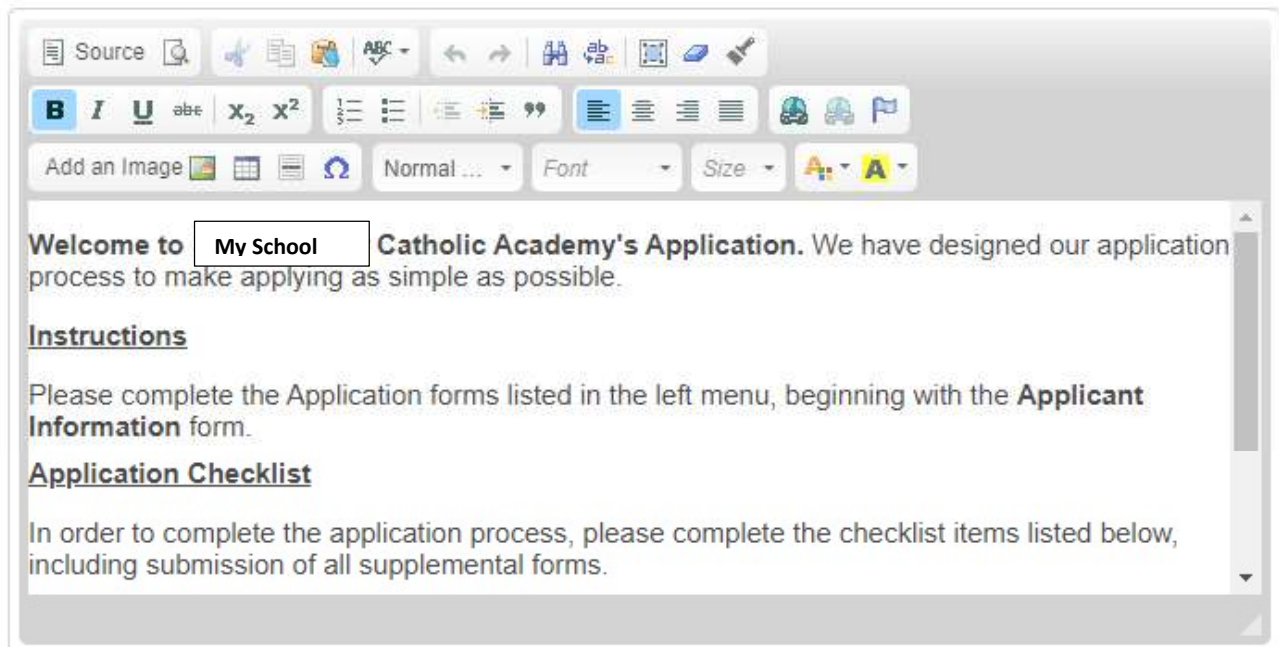
Select **Instructions and Resources**



Please Read through your Instructions and Make Sure all **Dates, Names etc. are Correct**

2024-2025

Instructions and Resources



Once Completed, Select **Save** to **Save** your Changes



Select **Save** to **Save** your Changes

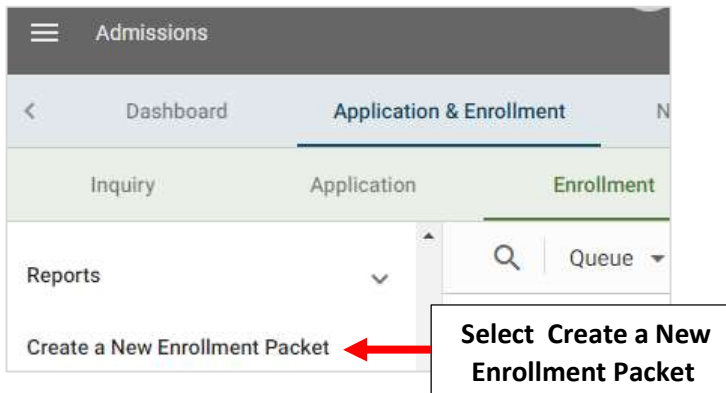


### 3. Copy Enrollment Packet

Once logged into FACTS please select **Admissions > Application and Enrollment** and Select **Enrollment**



Select **Create a New Enrollment Packet**



Select **Previous Year's Enrollment Packet** under **Copy Existing Enrollment** Dropdown. Enter **New Enrollment Packet Name**, Verify **New School Year** is Selected and Select **Create New Enrollment Packet**

A screenshot of the 'Create a New Enrollment Packet' form. The form has the following fields and callouts:

- 1. Select Previous Year's Enrollment Packet:** A dropdown menu labeled 'Copy Existing Enrollment Packet:' with the value '2023-2024 Enrollment Packet' selected.
- 2. Enter New Enrollment Packet Name:** A text input field labeled '\* New Enrollment Packet Name:' with the value '2024-2025 Enrollment Packet' entered.
- 3. Select New School Year:** A dropdown menu labeled 'School Year:' with the value '2024-2025' selected.
- 4. Select Which Students Enrollment Packet Applies To:** A section labeled 'Enrollment Type(s):' with the instruction 'Select which enrollment types this packet applies to. At least one is required.' Below it are two checkboxes: 'Returning Students' and 'New Students', both of which are checked.



Place Check Mark by **Enrollment Responsible Parent** under Packet Type. Check both **Admission Status** and **Reenrollment Status**. This will Automatically Mark the Enrollment Packet **Finished** when it is Submitted by Parent.

Select Create New Enrollment Packet to **Save** Changes

The screenshot shows a form titled "Packet Type: To be filled out by:" with two radio button options: "Enrollment Responsible Parent" (selected) and "Secondary Parent (Typically a signature-only packet)". Below this are two checked checkboxes: "Admissions Status: Mark Admissions Status as Finished when Enrollment Packet is submitted. (only applicable if 'New Students' is selected above for Enrollment Type)" and "Reenrollment Status: Mark Reenrollment Status as Finished when Enrollment Packet is submitted. (only applicable if 'Returning Students' is selected above for Enrollment Type)". There is also an unchecked checkbox for "Enrollment Fee Waived: Parents will not make enrollment fee payment at time of submission". At the bottom is a blue button labeled "Create New Enrollment Packet".

Callouts:

- A box on the left says "Check both Admission Status and Reenrollment Status" with red arrows pointing to the two checked checkboxes.
- A box on the right says "Select Create New Enrollment Packet" with a red arrow pointing to the "Create New Enrollment Packet" button.

Select **Grade Levels** to Include in Enrollment Packet and Select **Save** to **Save** Changes

The screenshot shows a form titled "2024-2025 Enrollment Packet" with a section "Grade Levels for Enrollment Packet". Under "Grade Level(s):", there is a list of checkboxes for grade levels: 01, 02, 03, 04, 05, 06, 07, 08, K, PK3, and PK4. The checkboxes for 01 through 08 and K are checked, while PK3 and PK4 are unchecked. At the bottom is a blue button labeled "Save".

Callouts:

1. Select Grade Levels (with a red arrow pointing to the checked checkboxes)
2. Select Save to Save Changes (with a red arrow pointing to the "Save" button)

**\*\*Please Note: To Access Enrollment Packet it Must First be Turned "ON"\*\***

To **Turn On** New Enrollment Packet Set **Both** In-Progress and New Enrollment Packets to **“On”**. To **Prevent** Parents from creating a New Enrollment Packet, Set **Both** In-Progress and New Enrollment Packets to **“OFF”**. Select **Save** to **Save Changes**

2024-2025

**1. Set Parents can continue working with an In Progress Enrollment Packet to “On”**

Controls

In-Progress Enrollment Packets:  ON - Parents can continue working with an In-Progress enrollment packet.  OFF - Parents cannot continue working with an In-Progress enrollment packet.

When OFF, display this text when parents try to edit an In-Progress enrollment packet:

Note: you can use **\*\*school\_year\*\*** to display this packet's school year to parents.

**2. Set Parents can Start a New Enrollment Packet to “ON”**

Start Enrollment Packets:  ON - Parents can start new enrollment packets.  OFF - Parents cannot start new enrollment packets.

**3. Select Save to Save Changes**

Save

To **Close** the **Previous Year's** Enrollment Packet, Select the **Enrollment Packet**

2022-2023 ▶ Packet Settings

2023-2024 ▶ Enrollment Packet (enroll resp.)

**Select Enrollment Packet**

Select **Controls**.

2023-2024 - Enrollment Packet ▾

Enrollment Packet Settings

Grade Levels for Packet

Controls

**Select Controls**

Set **Both** In-Progress and New Enrollment Packets to **"OFF"**. Select **Save** to **Save Changes**

The screenshot shows the '2024-2025 Controls' section. Under 'In-Progress Enrollment Packets', the 'OFF' option is selected with a checkmark. Below it, a text box contains the message: 'Saint Saviour Catholic Academy is not currently accepting online enrollment packets.' Under 'Start Enrollment Packets', the 'OFF' option is also selected with a checkmark. A blue 'Save' button is located at the bottom. Three red callout boxes with arrows indicate the steps: '1. Select "Off"' points to the 'OFF' checkbox for In-Progress Enrollment Packets; '2. Select "Off"' points to the 'OFF' checkbox for Start Enrollment Packets; '3. Select Save to Save Changes' points to the 'Save' button.

You will now need to Update the Instructions and Resource Form.

Select the **School Year** and the **New Enrollment Packet** to Edit

The screenshot shows a dropdown menu with two options: '2022-2023' and '2023-2024'. The '2023-2024' option is selected. To the right, another dropdown menu is open, showing 'Enrollment Packet (enroll resp.)' as the selected item. Two red callout boxes with arrows indicate the steps: '1. Select the School Year' points to the '2023-2024' option; '2. Select an Enrollment Packet to Edit' points to the 'Enrollment Packet (enroll resp.)' option.

Select **Instructions and Resources**

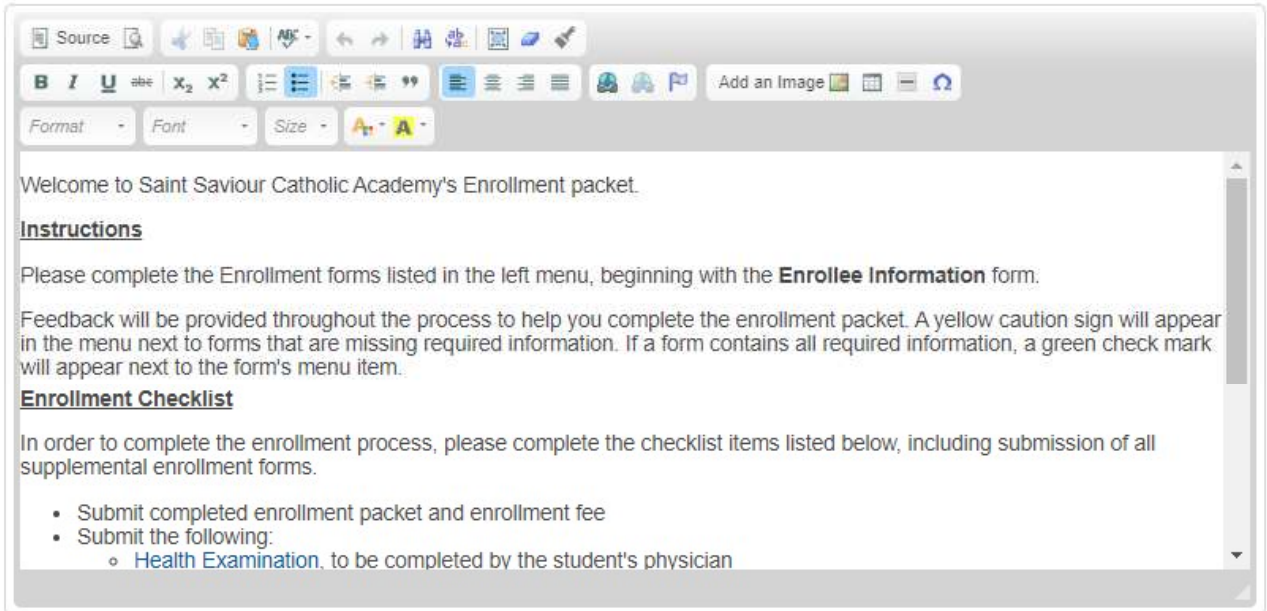
The screenshot shows a 'Form Selection' menu with four options: 'Edit List', 'Instructions & Resources', and 'Applicant Information'. The 'Instructions & Resources' option is selected. A red callout box with an arrow points to this option, containing the text 'Select Instructions and Resources'.

Please Read through your Instructions and Make Sure all **Dates, Names etc. are Correct**

2024-2025

**Instructions and Resources**

[View Seed Content Provided by FACTS SIS](#)

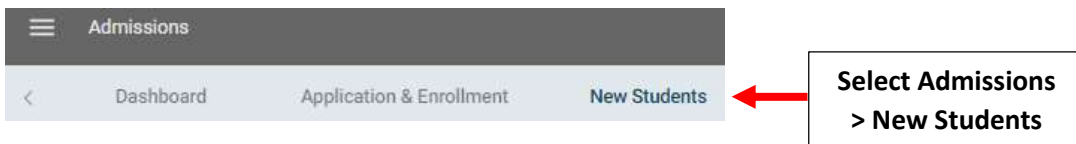


Once Completed, Select **Save** to **Save** your Changes



#### 4. Importing a New Application

Once logged into FACTS please select **Admissions > New Students**



## 1. Review Application

Click on **Submitted** in the Application Column for the Student you would like to Import

Student (30)	Grade	School	Admissions Status	Inquiry	Application ↓
Abraham, Sally	01	Premier Academy		Online Applicant	Submitted
Adams, Frank	PK3	Premier Academy			Submitted
Anderson, Penny	01	Premier Academy			Submitted

Click on Submitted

Select **Review Application**

**Submitted**

Next Step - Application Review  
Verify all required items have been submitted with the application.

[REVIEW APPLICATION](#)   [RETURN TO PARENT](#)

Select Review Application

Once Information is Verified Select **Review Complete**

Admissions

Dashboard   Application & Enrollment

← **Review Complete** →

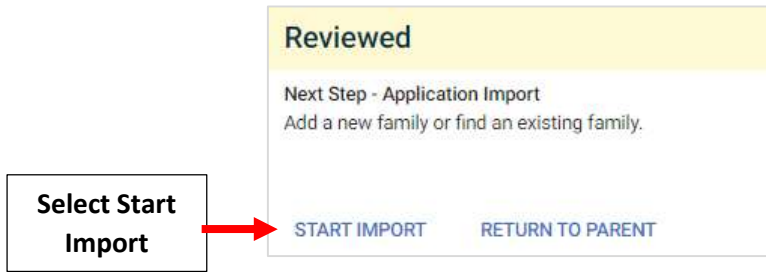
Select "Review Complete"

Application Status is now **Reviewed**

Grade	School	Admissions Status	Inquiry	Application ↑
06	Premier Academy		Status is now Reviewed	Reviewed

## 2. Import Application into Admissions

Select **“Start Import”** to begin Import Process



**New Families:** If Family is New to the School, All Dropdowns will be set to **“New”**. Verify Student Information and Parent(s) Names are Correct than Select **Import into Admissions**

← Application Import

Save Import Settings  
Import into Admissions

3. Select Import into Admissions

Show Instructions

**Penny Anderson**

Household # 1

	Application	FACTS SIS
Household:	Anderson, Matthew Anderson, Alisha 700 Lincoln Avenue Loveland, CO 98674 USA	-- New --
Student:	Anderson, Penny T	-- New -- + Find Student
Parent:	Anderson, Matthew	-- New -- + Find Parent
Parent:	Anderson, Alisha	-- New -- + Find Parent

1. Verify Information is Correct

2. All Dropdowns will be set to "New"

**\*\*\*Please Note: Families with Multiple Household will Need EACH Household Verified\*\*\***

Notice: This application has two households.

	Household # 1	Household # 2
Household:	Leitch, Mark Leitch, Phelecia 4117 5th Ave. Fort Worth, TX 76244 USA	FACTS SIS -- New --
Student:	Leitch, Joshua David	-- New -- + Find Student
Parent:	Leitch, Mark	-- New -- + Find Parent

Verify Household #1

Notice: This application has two households.

Household # 1		Household # 2	
Application		FACTS SIS	
Household:	Leitch, Phelecia 4117 5th Ave. Fort Worth, TX 76244 USA	?	-- New --
Student:	Leitch, Joshua David		-- New --
Parent:	Leitch, Mark		

Verify Household #2

**Existing Families:** If the Family currently Exists FACTS will **Suggest a Match**. Click **Dropdown** to Select Family

### Jaxson Baker

Household # 1	
Application	
Household:	Baker, Matt 123 Facts Way Lincoln, NE 68505 USA
FACTS SIS	?
	Select Household
	1 suggested match

Click Dropdown to Select Family

Select **Family** from Dropdown or if Family is **Not** a Match leave as **New**

Household # 1	
Application	
Household:	Baker, Matt 123 Facts Way Lincoln, NE 68505 USA
FACTS SIS	?
	Baker, Phillip and Polly
	1 suggested match

Select Family from Dropdown

Verify Student Information and Parent(s) Names are Correct and the Dropdowns are either set to **Existing** Family Member or Set to **New**. Select **Import into Admissions**

← Application Import

Save Import Settings
Import into Admissions

3. Select Import into Admissions



## Jaxson Baker

Household # 1

Application	FACTS SIS
<b>Household:</b> Baker, Matt 123 Facts Way Lincoln, NE 68505 USA	Baker, Phillip and Polly (1598039002) 1 suggested match
<b>Student:</b> Baker, Jaxson	-- New -- <a href="#">+ Find Student</a>
<b>Parent:</b> Baker, Matt	-- New -- <a href="#">+ Find Parent</a>

**1. Verify Information is Correct**

**2. Select from Dropdowns or Set to New**

When Import is Complete, Application will Display as **"Import Completed"**

Student (35)	Grade	School	Admissions Status	Inquiry	Application
Koller, HAley	05	Premier Academy			In Progress
Leitch, Joshua	11	Premier Academy			Import Setup Saved
					Import Completed

**Displays as Import Completed**


### 3. Finish Application and Create Enrollment Record

Once Imported the Admission Status will now Display as **"Submitted"**. Once All Forms and Registration Fees have been Collected for Student, Click on the Admission Status **"Submitted"**

Student (35)	Grade	School	Admissions Status	Inquiry	Application
Koller, HAley	05	Premier Academy			In Progress
Rogers, Michael	11	Premier Academy	Submitted		Import Completed

**Click on the Admission Status "Submitted"**

Select **Update Status**

  
Inquiry    Application    Enrollment

**New Student - Submitted**

Status: Submitted  
Grade: 01  
Year: Premier Academy: 2018-2019

[UPDATE STATUS](#)

**Select Update Status** (points to UPDATE STATUS)

Change Status to **Finished** and Verify **Grade Level** is Correct. Check **“Mark Student as Pre-Enrolled”** and Select **Update Status**

**Update Admissions Status**

Status: **Finished** (1. Change Status to Finished)

Grade: **01** (2. Verify Grade Level)

Year: Premier Academy: 2018-2019  
: 2024-2025

Admissions Finished  
Do you want to update the SIS Student status?  
 Mark Student as Pre-Enrolled (3. Check “Mark Student as Pre-Enrolled”)

Cancel    **Update Status** (4. Select Update Status)

Status is now **“Finished”** and Student will Appear in FACTS SIS with a Status of **Pre-Enrolled** in the SIS

Student (7)	Grade	School	Admissions Status
Rogers, Michael	01	Premier Academy	<b>Finished</b> (Status is now Finished)

**School Information**

Current: Pre-Enrolled (Status is now Pre-Enrolled)  
Next: Enrolled - Pre-K