



AERIESCON
S p r i n g 2 0 2 4

Session 200

Aeries Online New Student Enrollment

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STEPS TO SET UP ONLINE ENROLLMENT

➤ **DEFINITIONS**

➤ **DIRECTIONS**

➤ **DOCUMENTS**

Basic Settings – Part 1

- **CURRENT ENROLLMENT YEAR:** The CURRENT school year.
- **PRE-ENROLLMENT:** Enable or Disable Pre-Enrollment: If enabled it allows parent to be able to pre-enroll for the next school year.
- **ENROLLMENT AGE LIMIT:** Define a minimum and maximum age for enrollments. Age is calculated as of July 1 of the current academic year, using the birthdate the parent enters. If the age is outside of the set range, an alert displays and the enrollment stops. User will see the following message “Please enter a valid age in order to continue.”
- **ENFORCE TK BIRTH DATES:** In addition to the set Enrollment Age Limits, when enabled, users will be prevented from enrolling students in Transitional Kindergarten if their birth date does not fall within CDE’s eligibility guidelines. The user will see a message “Please enter a valid age in order to continue.” If this option is not enabled, the user will be able to change the grade level from Transitional Kinder to Kindergarten, for example, and continue through the enrollment process.
 - Transitional Kindergarten eligibility dates:
 - In 2024–25, children are eligible for TK if they turn 5 between September 2 and June 2*,
 - In 2025–26, LEAs are required to make TK available to all children who will have their fourth birthday by September 1* of the school year.
 - *Inclusive of these dates

Link to CDE website: [CDE TK/Kindergarten Enrollment Eligibility](#)

DISTRICT INFORMATION: Your district name here. This text is shown on the Login page.

Basic Settings – Part 2

STREETS TABLE: Options are None, Street Table or DecisionInsite.

None - No address validation is used. Parents can enter any address.

Street Table (set to Yes)- The Street table (STR) is used for School assignments based on the Student Resident Address (STU.RAD). It requires a populated and maintained Street table in Aeries.

If set to use DecisionInsite - they validate the street address and show School assignment. Note: The option to use DecisionInsite only appears in the list to select if the option to *“Use DecisionInsite for Street Validation”* has been enabled in the Aeries Web. Review the documentation [here](#).

LANGUAGE CHOICES: Select which languages to make available to Parents. English is default.

GRADE CHOICES: Select which grade levels the Parents can choose from.

EMAIL CONFIGURATION: The lower portion of the **Basic Settings** tab consists of configuration settings which must be populated correctly in order for the synchronization between Aeries Online Enrollment and Aeries Web to function.

Click here for more information: [Aeries Online Enrollment - Basic Settings](#)

GOOGLE MAPS: If set to Yes it enables the use of Google Maps. This displays a Google map of the School after the School is selected or assigned.

Optional Fields - Yes or No Options

- ❖ ASK FOR A PREFERRED SCHOOL?: If set to yes, this will allow the parent to select a preferred school that exists within your Database
- ❖ ASK FOR STUDENT EMAIL?: If set to yes, this will display a question asking what the student's email is during the enrollment process. Student email is required.
- ❖ ASK FOR US ENTER DATE ?: If set to yes, will display the question "What is the Students US entry date?" during the enrollment process. If set to no, it will hide the question.
- ❖ ASK FOR US PRE-SCHOOL ENTER DATE?/ ASK FOR US SCHOOL ENTER DATE?/ ASK FOR CA PRE-SCHOOL ENTER DATE?: Yes/No
- ❖ ASK FOR BIRTHPLACE: Yes/No. When set to No the Birth city, State and Country fields are hidden.
- ❖ SHOW THE SIGNATURE LINE ON THE CONFIRMATION PAGE: Yes/No
- ❖ ASK FOR SPECIAL ED OR 504 PLAN: These questions are not mandatory. Will be populated if/when the parent completes the data in "Previous Schools"
- ❖ SKIP HOME LANGUAGE SURVEY FOR STUDENT'S WHO HAVE PREVIOUSLY ATTENDED A CALIFORNIA SCHOOL?: If set to Yes, the parent will be asked if the student has previously attended a California school. If set to No, the language survey will be asked normally. *Note: This is only relevant if this page is NOT set to "skipped".*

Optional Pages: Part 1- *Show, Skip, Show (Optional) or Show (Required)*

Show – Display the page to parent during the enrollment process

Skip – Hide the page during the enrollment process

Show (Optional) – Display the page during the enrollment process but not required the page to be completed.

Show (Required) – Display the page during the enrollment process but required the page to be completed.

LANGUAGE INFORMATION: This is your Language Survey

Keep in mind the Correspondence Language, Language Fluency and the Home Language Survey Completed date are NOT part of the Import Process – this is working as designed.

MEDICAL HISTORY PAGE: Codes are pulling from your Code Table (MHS.CD). At this time, no way to limit – this is being addressed through an Aeries Idea.

DOCUMENT'S PAGE: See Documents slide.

DOCUMENTS UPLOAD PAGE: See Documents slide.

Optional Pages: Part 2- *Show, Skip, Show (Optional) or Show (Required)*

FAMILY MILIARY, RESIDENT AND FOSTER SURVEYS PAGE: If you choose to ask the Foster, Military & Residence Survey questions in Online Enrollment.

*** The Survey response when using Online Enrollment will display the results as a Program record under Special Programs. It will not be displayed on the Audit pages.*

PLEASE NOTE: there has been a revision to the Residency Survey to update the 2021 CDE Guidelines. For more information, please go to [Residence Survey Changes for the CDE 2021 Housing Questionnaire](#)

Please Note: The majority of translations pull from the COD table in Aeries Web. Before enabling a language, ensure all of the Codes and Questions are translated. The Family Military Survey and the Residence Survey use the translations from Portal Options according to the School the Parent is enrolling for.

OUT OF STATE CONTACT: To collect an out of state contact in case of emergency

LOCAL PHYSICIAN PAGE: If enabled will appear in the contact page in Aeries

PREVIOUS SCHOOL PAGE: Ask for schools attended. This is not mandatory.

IMMUNIZATIONS PAGE: Immunizations page this is commonly Skipped, Parents may enter the information incorrectly. Consult with your Nurses and other Stakeholders. Alternative is to request they upload the immunization card under Document Upload.

Optional Pages: Part 3- *Show, Skip, Show (Optional) or Show (Required)*

PARENT PAGE: Displays the parent page for data entry.

RESTRAINED PAGE: Allows the parent to enter a restrained individual. A contact record will be create as "restrained".

Helpful hints: *Throughout the process save your basic settings located on the bottom of the page*

School Settings

The list of Schools is coming from the Schools currently in your database (LOC)

Add your Schools- depending on how you are rolling this out (pilot program – just add one)

You may enter in an email address (more than one – email address comma NO spaces) this person will be sent a “heads-up email” informing them that a student is ready to be reviewed. You could create a group email for those who are doing more of a Central Enrollment

A program is non-grade specific – when enabled you will have the option of enrolling a student for a grade or a Program (this is not commonly used – if you are considering this as an option, please submit a ticket. This is a very specialized area)

Helpful Hints: If you need to edit the email address for a specific school at this time you will need to delete the school, then add it back in.

Directions

Give parents directions for completing the enrollment.



Questions and Codes – Part 1

WHAT IS AN AUTHORIZATION?: An example of an Authorization would be a question where you want Parent consent. Such as: Allow Student to use the Internet or Allow the student's photo to be published in District Brochures and Press Release. Set the Yes/No Options to match the Authorization Status types defined in your Code Table (AUT.ST & AUD.CD). Post your authorization questions under Code/Question.

ENROLLMENT AGE LIMIT MESSAGE: A default message is posted. You have the ability to customize the message.

ASK ALLOW PORTAL ACCESS/HEADER TEXT FOR "ALLOW ACCESS TO PORTAL PROMPT: If set to Yes, ask "Allow Portal Access" on the Contacts page. It requires an email address be entered for the Contacts that are set to Yes. You can customize this prompt for the header text.

HELP TEXT: Displays when a parent hovers over the Question mark. This message can be customized.

ASK SHOULD A SECOND COPY OF MAIL BE SENT TO THIS CONTACT: If set to Yes, ask for Mail Tag information on a Contact. This field maps to CON.MT in Aeries.

ASK PARENT EDUCATION LEVEL: Enable/Disables asking for Parent Education Level for the Parent/Guardian Contacts.

EMERGENCY CONTACTS ASK FOR EMAIL: If set to Yes, ask for the email address of Emergency Contacts. If set to No, it does not ask for email address of Emergency Contacts and disables asking if the Emergency Contact should have Portal access.

Questions and Codes – Part 2

CONTACT CODES: Contact Code values map to the CON.CD field in Aeries. The codes that are entered must match what is in the Aeries Code Table for CON.CD.

CONTACT RELATIONSHIPS: The values from the drop down list come from the Aeries Code Table (CON.RL). Translations take place in the Code table

***Note:** There is an Aeries idea to add Contact Fields to Online Enrollment - such as Notification Preference, Attendance Notifications, Ed Rightsholders*

GENERAL STUDENT INFORMATION:

Ask Student's State ID: Enable/Disables asking for the Student's State ID

Require Ethnicity : Enable/Disables requiring a value be entered for the Ethnicity of the Student. The question still displays to the Parent

Require Race: Enable/Disables requiring selecting the Race of the student. The question still displays to the Parent.

Please note: These are your Federal questions – when set to NO, it will allow the parent to skip through the process

Questions and Codes - Part 3

SUPPLEMENTAL QUESTIONS:

Supplemental Questions can be added for Parents to answer as a way to capture answers normally given in paper form in addition to the traditional enrollment paperwork. Each question is mapped to a destination table and field in Aeries Web. The current destination tables available to store answers are STU and SUP.

The codes that are set up in the Admin Online Enrollment must match the code value and length that is in the Aeries Code table (COD) for the corresponding STU or SUP field.

For example, field STU.U11 in the Aeries Web is used to store a dropdown of choices with codes A, B, and R.

The Online Enrollment side must also set up with the same code values of A, B, and R to match. These are questions that may be asked that would not be addressed through a Document or Authorization.

Sample question : Is your student receiving Special Education services (IEP)?

These questions may be set up as a Yes/No or you could create a custom dropdown list.

Your questions maybe mapped to the STU Users Fields (STU.U1 –STU.U13) on the Demographic page or to the Supplemental Table.

Please note: this area supports translations

Admin User

Admin Users area is where you can create additional Administrator logins for the Online Enrollment configuration.

NOTE: All new administrator logins default to the password "changeme". The first time the new Admin account logs into the Admin module with the "changeme" password, they must set a new password.

After a user name has been created, it shows under the **Admin Users** tab. There is an **Edit** and **Delete** option next to it.

Helpful Hint: only one admin user should make changes at one time

Documents

What documents are you requiring parents review?



Documents

Documents can be displayed for Parents to view and print during the enrollment process. Documents viewed by the Parent are logged in the DCL table in the AeriesRegistration database. If an enrollment containing documents viewed is imported into Aeries, a corresponding Document Confirmation (DCL) record is also added.

This give you the opportunity to present Documents to your Parents you want them to review. For example, a Student Handbook.

Configuration of these Documents is in Aeries under > Portal Options > Portal Documents

For documentation on Portal Documents [Click Here](#)

Documents used for Online Enrollment are shared with those used in the Parent Data Confirmation process. Documents need to be uploaded through the Portal Documents page.

Navigate to **School Info > Portal Management > Portal Documents.**

For Districts that prefer to use a separate Document Management System and only show links in Online Enrollment for the Parents to click on, this can be accomplished by placing the links in a document and saving the document as a .config file.

NOTE: the .config extension needs to be added to the **Allowed Files** list on **District Settings**

****Best Practice: Post only documents that are reviewed once during enrollment.***

Documents Upload

This will allow your Parents the opportunity to upload the documents that your District mandates as part of the enrollment application process such as:

- Current utility bill
- Birth certificate
- Immunizations records

Displayed you will see the allowed file types – used to prevent Parent from Uploading unwanted file types

Code Table – you may create a new category & subcategories (DOC.CT, DOC.SCT)

You may decide to make some of your Documents that are being requested a requirement when this option is checked the Parent will not be allowed to proceed unless a document has been provided)

Decide the security area - This is up to each District (consult with your Stakeholders as needed)

***This area supports translations*

Custom Text

Custom Text tab allows a District to define what text is displayed to the Parent when using enrolling a Student.

The **Custom Text** supports translations for each language selected on the **Basic Settings** tab. This text usually consists of instructions to Parents and explanations of different options available

The **Custom Text** area boxes have Rich Text Editor capabilities to add hyperlinks, images and formatting options for font and background colors.

The **Custom Text** boxes each have a **Reset** button. The reset button can be used to set an individual custom text box back to the default system text if available. *NOTE: When using a Reset button, it also removes the translations for that specific Custom Text box.*

Each **Custom Text** box has a **Preview** button that allows the Admin to quickly preview the appearance of the Custom Text on the page (this is the parent view). **Preview** is done for each Custom Text box and language individually.

This area supports Translations – The Custom text for each Language selected on the Basic settings tab will need to be translated by the District in the Custom Text area.

***Helpful Hints:** Use the Preview feature to see where the text will appear in the parent view . You can add hyperlinks, formatting options for font and background colors . When Translating use, the show in English – helps to save time During the translation do not have multiple tabs open.*

Some Areas to Review

Make sure all codes are mapped and translated (if appropriate)

Make sure you have added your Schools – in the School Settings tab

Create a test student in other languages (looking for missing translations)

Custom Text – Show the English version when working on your Translations – use the preview option

On the optional Pages Section – make sure the settings are set to **SHOW OR SKIP**

Race and Gender are fixed codes - go to the District Code table to add your translations

Define the User fields in Demographics for the supplemental questions.

Helpful Hint

Translations that need to be done within the Online Enrollment Admin System Settings for:

- *Custom Text*
- *Questions & Codes - Authorizations Questions & Supplemental Questions*
- *Contact Relationship - need to be translated within the Code Table (they will not be displayed translated in Spanish within the OE Admin System Settings)*

Go to the Source

Supporting Articles maybe found in Freshdesk <https://support.aeries.com/>

<https://support.aeries.com/support/solutions/articles/14000078615-aeries-online-enrollment-admin-settings>

<https://support.aeries.com/support/solutions/articles/14000082170-aeries-online-enrollment-parent-process>

<https://support.aeries.com/support/solutions/articles/14000082171-aeries-online-enrollment-importing-students>

<https://support.aeries.com/support/solutions/articles/14000114309-portal-document-requests>

<https://support.aeries.com/support/solutions/articles/14000071659-parent-data-confirmation-setup#documents>

Helpful Hint: follow the revision notes to be notified of Updates

THANK YOU!

Please take a moment to complete our session survey.

<http://surveys.aeries.com/s3/AeriesCon-Session-Feedback-Survey-Spring-2024>



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