Online Registration – Monitoring Progress and Approving Submissions

Overview

Once Online Registration is enabled and parents start submitting forms for approval, the district may track who uses Online Registration, who has begun the process, who has submitted forms, and whose forms have been approved. This document tells how to do this as well as how to review then approve or reject a family's forms once they have been completed and submitted. Much of monitoring parent progress uses the Student Data Grid. For details on how to use the grid, please see Student Data Grid on the Tyler SIS support site.

Monitoring Progress

Path: View/Maintain > Student > Student Data Grid and Groupings

To track the progress of online registration, the Student Data Grid for the *Future* academic year can be used to:

- Get counts of families with forms in progress, submitted, and/or approved.
- Email reminders to parents who have not completed and submitted their forms.

Set the Grid Option for **Display only one row per Family** to prevent information from being repeated in the grid multiple times (once for each student in the family). Select **Actions > Grid Options**.

- Click the **Select Columns to Display** icon to use to facilitate this:

  - **Online Reg Start Date** – The date on which the online registration page on the parent portal was first accessed by this family for this site-year. If this date is not blank, it indicates the family has at least looked at the forms. They may have completed all of the forms but forgot to click **Submit**. If reminder emails are going to be sent to all the parents who have not completed their registrations yet, you may wish to separate this group and tailor the email to them differently than the one to those who have not even been to the page yet.

  - **Online Reg Submit Date** – The date on which the forms were submitted to the district from the parent portal.

  - **Online Reg Accept Date** – The date on which the forms were accepted and processed by district staff.

School Alerts

Users with Main Menu and applicable permissions see the **School Alerts** panel on the Home Page.

SCHOOL ALERTS

Discipline
No Referrals Waiting for Admin
No Referrals Admin is Reviewing

Update Household Data
ON for Past, Current Year
No entries to Review

Online Registration
Active in Year 2021 (All)
1 entries to Review in Year 2021

The bottom section of this panel shows for which years Online Registration is active and the count of entries in the logged in year that are waiting for review. The status for each year also shows whether Online Registration is active for Regular (indicating the grade levels) and / or Quick Registration. The line showing entries awaiting review is a link to the Review Online Registration From Portal screen.

Auto Accept

On the Parent Student Portal Configuration screen, the fields on the system forms can be marked **auto accept**, indicating that changes entered for them do not need to be reviewed. Some fields, such as cell number, are not things which need to be validated by staff, so there is no need to view these changes on the review screen. In addition, if none of the changes on a submission need to be reviewed (any changes on system forms were to fields marked auto accept and there are no fields on the custom forms marked as requiring approval), the submission is approved automatically without requiring any interaction by staff.

Reviewing Submitted Forms

Path: View/Maintain > Student > Review Online Registration from Portal

All forms submitted via online registration must be processed by district staff before they become official. The entire collection of forms submitted by each family appears as a single entry on the list of submissions awaiting approval.

REVIEW ONLINE REGISTRATION FROM PORTAL

ZZHS - 2021 (Future) Edwards High School - 2020-21

Done Edit Cancel

From Portal | Select View

Status Review

Submit Date / Time	Submitted By Parent	Student	QR / Grades	+Fam	+Stu	Notes
07/25/20 10:40 AM	Barker, Joe	Barker, Debbie (ZZMS 08) / Barker, Michelle (ZZHS 12) / Barker, Max (ZZNE 04) / Barker, Jeanne (ZZHS 12)	All		1	
01/20/20 03:48 PM	Bruni, Bev	Cole, Bailey (ZZNE 05) / Cole, Nickolas (ZZNE 02)	All			

The QR/Grades column shows the grades for which Online Registration was open at the time each submission was sent. This can be a helpful reference. For example, if some of the students in the family appear to be missing from the submission, this column likely shows that Online Registration was only open for specific grades.

When you are logged into the Central Office site (if you have access), all submissions are listed. When logged into any other site, only submissions from families who have at least one student enrolled at the current site are be listed. The list can be filtered using the fields on the Select View tab.

Enter the filtering criteria then click **Update Display** to return to the Review tab with the filter applied.

To review a submission, click the **Select** icon ▶.

All changes made on System forms as well as anything marked as Must be Approved By Staff displays on this screen. This allows for review of this data before the submission is accepted.

The **Notes** field can be used if you decide not to process this submission right away and want to remember why. The Notes show in the right column on the **Review Online Registration from Portal** screen.
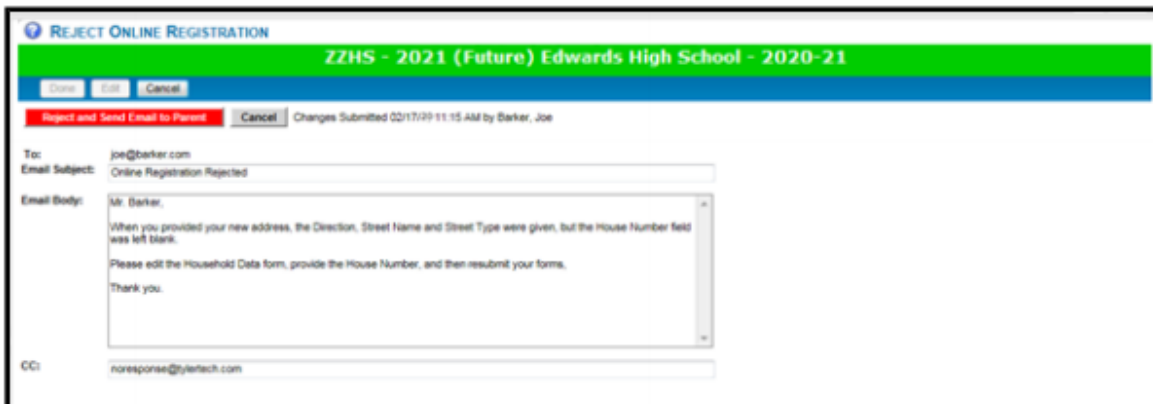

NOTE: Once a submission is accepted or rejected, it is removed from the list, so the Notes are no longer visible.

Rejecting a Submission

If there is a question about the changes or more information is needed, the submission can be rejected by clicking **Reject** (click the **Select** icon ▶ and click **Reject**). When clicked, a screen appears providing fields to create an email to be sent back to the parent explaining why the submission was rejected.

When a submission is rejected, <u>all</u> the forms are unlocked again, allowing the parent to make any necessary changes and resubmit. The Status of the forms changes back to Complete and all the data entered is retained, but the View links change back to Edit, allowing modifications to be made to the forms. The Online Reg Submit Date is also cleared to indicate the district is again waiting for this family to submit their forms.

Accepting a Submission

If all the submitted data appears okay, click **Accept and Process**. When this is done, several things happen:

- Changes made on the System forms are stored in the database.

- User-defined database fields are updated with data from any **Text with link to DB** fields.

- Electronic copies of each of the forms are created and attached to each of the students in the family.

- An email is sent to the parent stating that the submitted forms have been accepted and processed.

> The Online Registration forms that you submitted for 2021 have now been accepted and processed.
>
> Thank you.

Re-opening a Submission

The **Status** field on the **Select View** tab allows you to select between:

- **Review** – submissions that are awaiting approval
- **Accepted** – submissions that have already been reviewed and accepted.

Switching to **Accepted** and clicking **Update Display** shows a grid with information about all the submissions that have been approved.

NOTE: The Accepted column normally shows the date and time when the submission was approved and the name of the user who approved it. If a submission is auto-accepted (because the only fields changed where marked auto-accept), this column shows **Auto Accepted**. For auto accepted submissions, the date and time of acceptance are the same as the Submit Date/Time.

To re-open a submission, click the **Reopen** icon in the first column. This opens a screen like the one for rejecting a submission, allowing you to email the parent letting them know their submission has been reopened, why it was reopened (what they need to change), and that they need to go to the portal and resubmit.
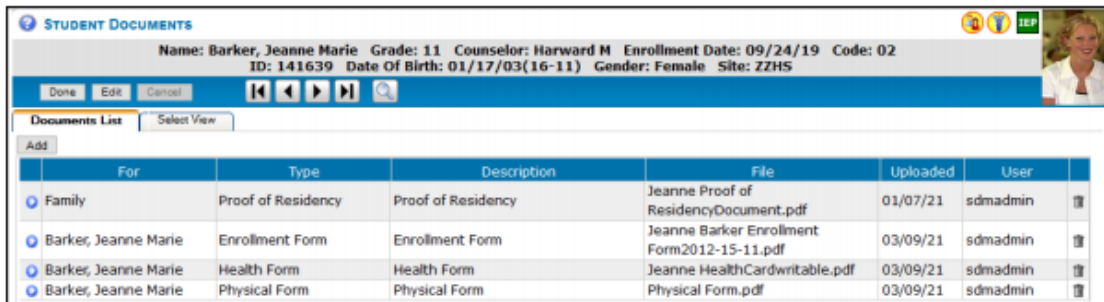
Viewing the Saved Copies of the Submitted Forms
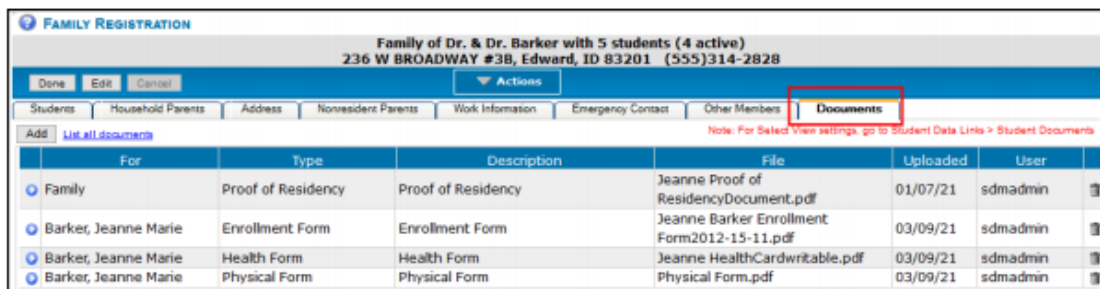
Path: View/Maintain > Student > Student Documents

or View/Maintain > Student > Family Registration and Search

To view the electronic copies of the forms, go to **Student Data Links > Student Documents** and select a student. Separate documents are created for family and student forms, and within those two categories, the forms may be separated further, depending on the Document Type settings assigned to the forms.

The documents can also be accessed from the **Documents** tab on the **Family Registration** screen.

The documents can also be viewed using the Student Documents Report. For details on that report, see *Student Documents Report* on the Tyler SIS v9 support site.

> **NOTE**: Once the PDF is created, the system sees it simply as a file with text in it. It does not have any way of knowing what forms are contained within that PDF. Therefore, it is recommended that separate Document Types be created for each form that may need to be printed out so that a separate PDF is created for each form. Doing so has two advantages:
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> - When a specific form for a student needs to be accessed, it can be opened directly rather than the user having to figure out which PDF it is in and then having to scroll thru a the PDF to find it.
>
> - When running the Student Document report, it is possible to select a single form to print rather than having to print a PDF that contains multiple forms.