Achademix

Student Data Management

Managing Student Activity (Part #1)

Student Records, Pathway Enrollment, Assessment & Initial Payments

CODELEVEL SERVICES LLC

Agenda

In this session users will learn how to enter student records, track required documents and assessment scores, enter notes and register and enroll students into Pathways.

- Entering New Students
- Entering Student Assessment Scores
- Registering and Enrolling Students in Pathways
- Taking Initial Payments
- Running a Deposit

Student Module

Working with Student Information…

Sessions

- Information
- Documents
- Enrollments
- Attendance
- Grades

Quick access to your students information…

easily accessing those students currently enrolled.

Student Module

Information: Student Contact and Demographic data. This is "static" data that is not related to any Pathways for which the student may be enrolled.

Documents: The Student File. This session provides a listing of documentation provided by, or for, the student such as Required Entry Forms, Activity History and General Notes.

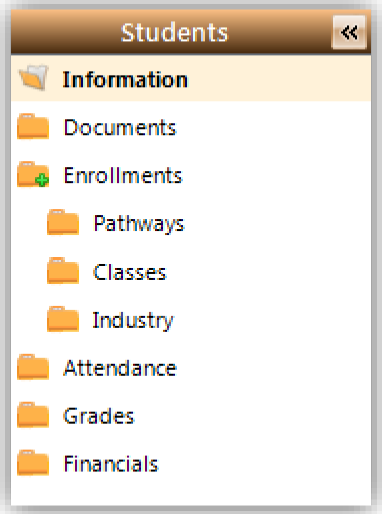
Enrollments: General term used for associating a student with the following:

- Pathways: Full-time Program

Attendance: Student Attendance Records (Not covered in this training session)

Grades: Student Grade and Performance Information (Not covered in this training session)

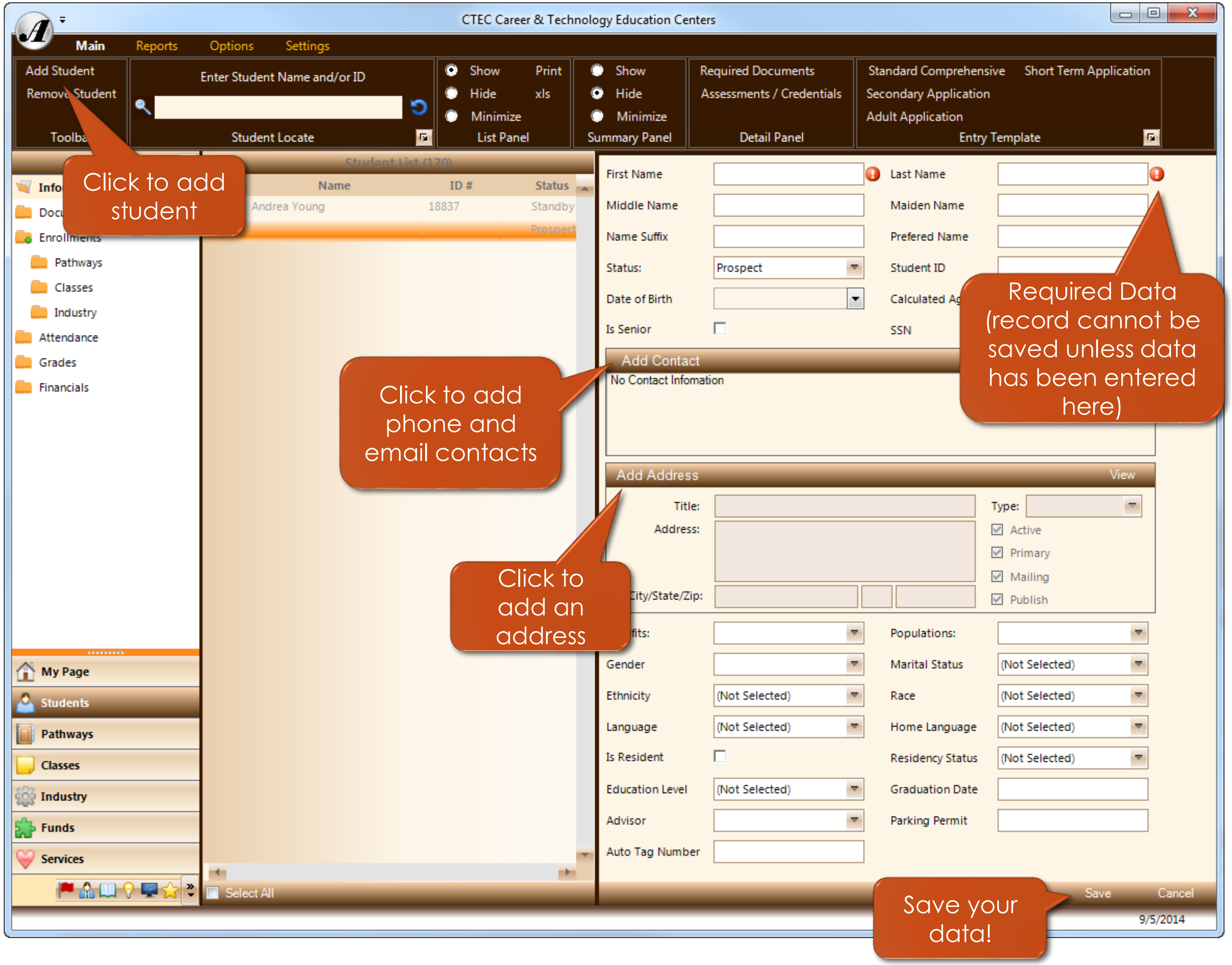
Financials: The Student Account (Charges, **Payments**, Financial Assistance)



Adding a New Student

BASICS

1. Navigate to the Student Module - **The default session is "Information", though be sure this is the selected session before moving to Step 2.**
2. In the Ribbon, select "Add Student"
3. The Detail Panel will become ready to receive new data, thus it is here where you can begin to enter the student's information
4. Once you have entered all applicable data, click on "Save" at the bottom of the screen



Student Information

All "Searchable" options using #POP

Key Information

1. First and Last Name (required)
2. Phone and Email
3. Address

Auto Filled Data (can be overridden)

1. Preferred Name
2. Student ID
3. Status (The system maintains control over this data and will change it as different events occur during normal operations. **Do not attempt to change this field manually unless you are making the student Inactive.** Note that if an immediate update does not occur after enrollment, etc., it will be auto corrected before the next day.)

Multiple Select Drop Down List

- Populations

Click outside the list to close it once your selections are made

Helpful Assistant

- Default area code is set to "740"
- Phone numbers will auto format, only enter the "numbers", no hyphens or parenthesis
- SSN will auto format, do not put in the hyphens

Duplicate Student Check

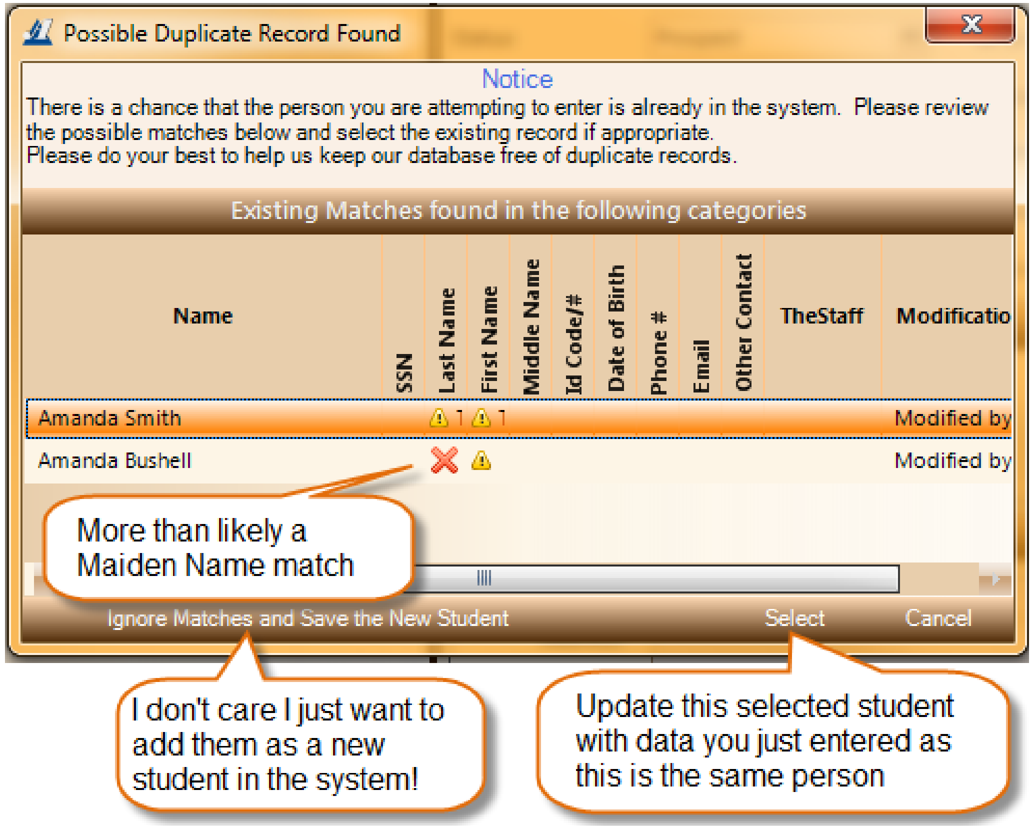
When a new student record is saved for the first time the system will evaluate the new entry against all existing student records in an attempt to locate any possible matches that are already in the database.

The more initial data that can be provided as a new student is entered, the better the matching results.

First name will also review against the name in the Preferred Name field.

Last name will also review against the Maiden Name field.

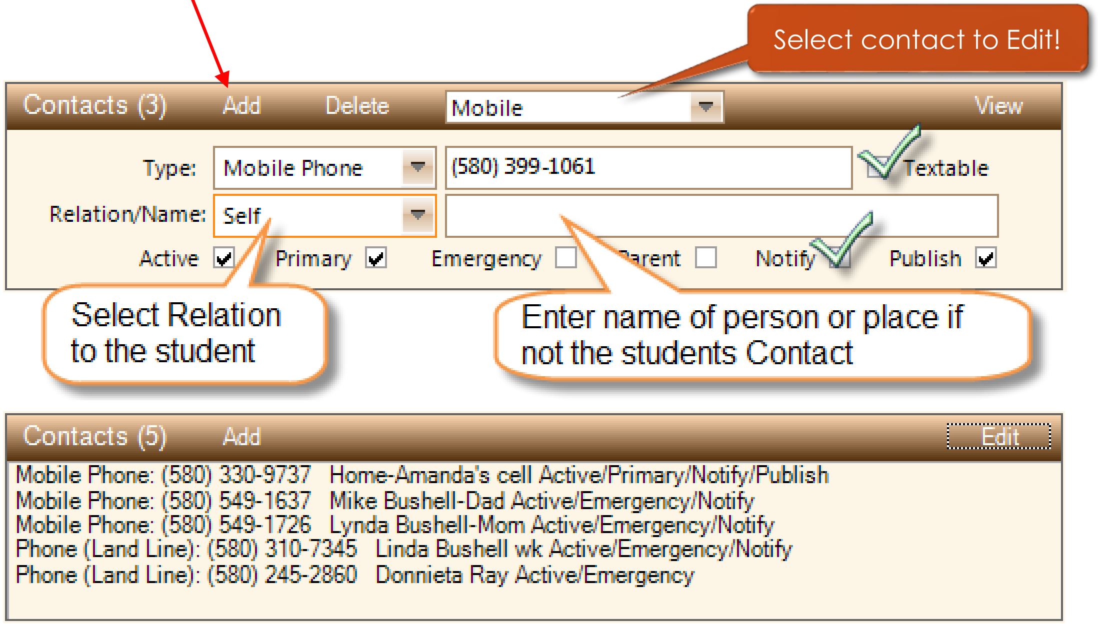
If no matches are found, the new student record is saved and you will not see this dialog.



Contacts and Addresses

Contacts: Unlimited

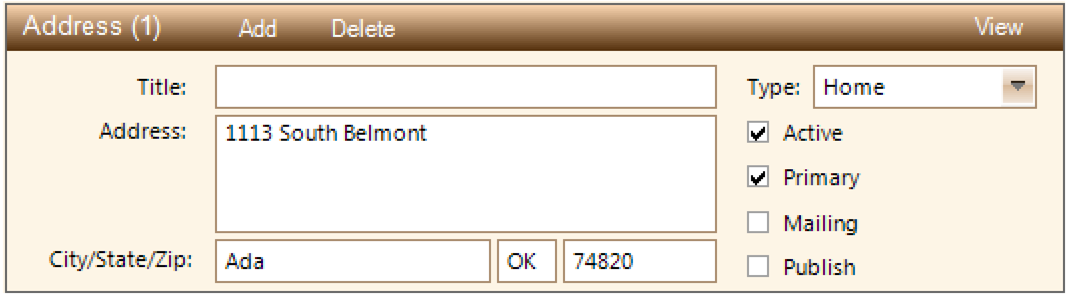
DO NOT DELETE old (once valid) contact information. Just uncheck the "Active" box and add your new contact information.



Addresses: Unlimited

DO NOT DELETE old addresses, simply uncheck the "Active" box and add your new address.

Do not put anything in the Title field unless it needs to be something different than the student's name (i.e. Parents Name, Employer's Name, etc.).

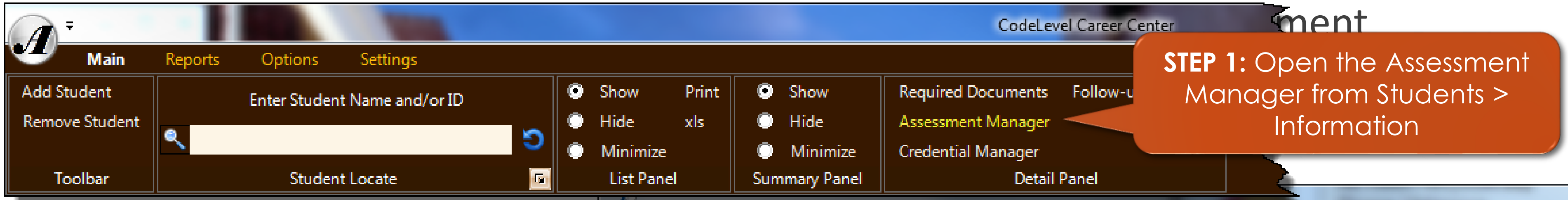


Contacts and Addresses (continued)

Options

- **Active** – If checked, this contact is current and may be used as a valid contact method. If unchecked it is no longer valid and should only be used for reference.
- **Primary** – If checked, this contact will receive first consideration when the system is locating contact information to place on reports or in summary screens.
- **Emergency** – If checked, this contact number will appear on the student summary panel in **bold red** print for quick access.
- **Parent** – If checked, this contact is considered a parent contact only.
- **Notify** – If checked, this contact can be used as a method to send information to the student by the means indicated.
- **Publish** – If checked, this contact information may be presented on a public form (i.e. web site)
- **Textable** – If checked, this indicates that this mobile phone can receive text messages.
- **Mailing** - If checked, this address will get first consideration when printing mail to addresses.

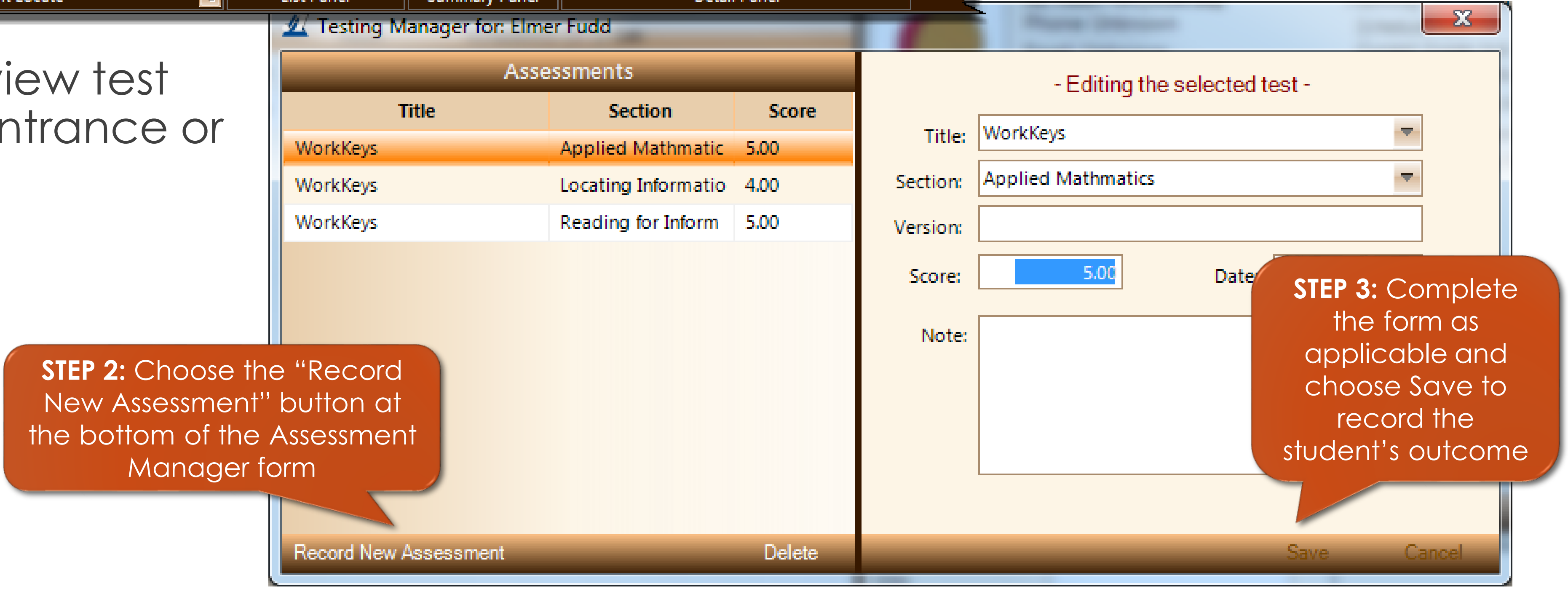
Student Assessments



Record and review test scores for pre entrance or exit exams.

Example:

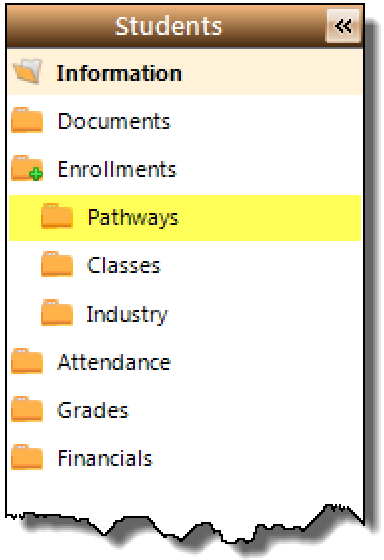
- WorkKeys

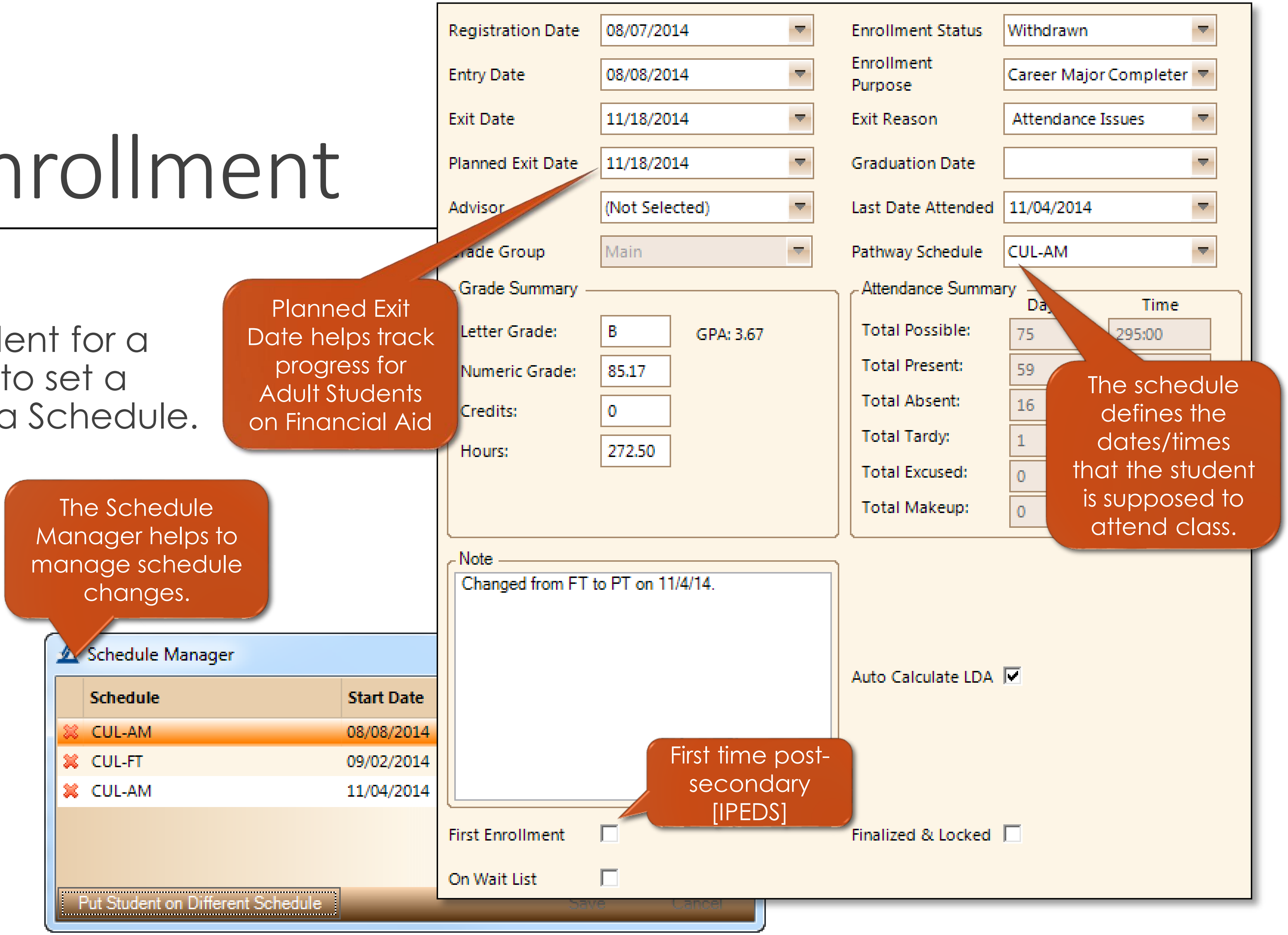


Pathway Enrollment

Full Time Programs

When registering a student for a Pathway it is important to set a Planned Exit Date and a Schedule.





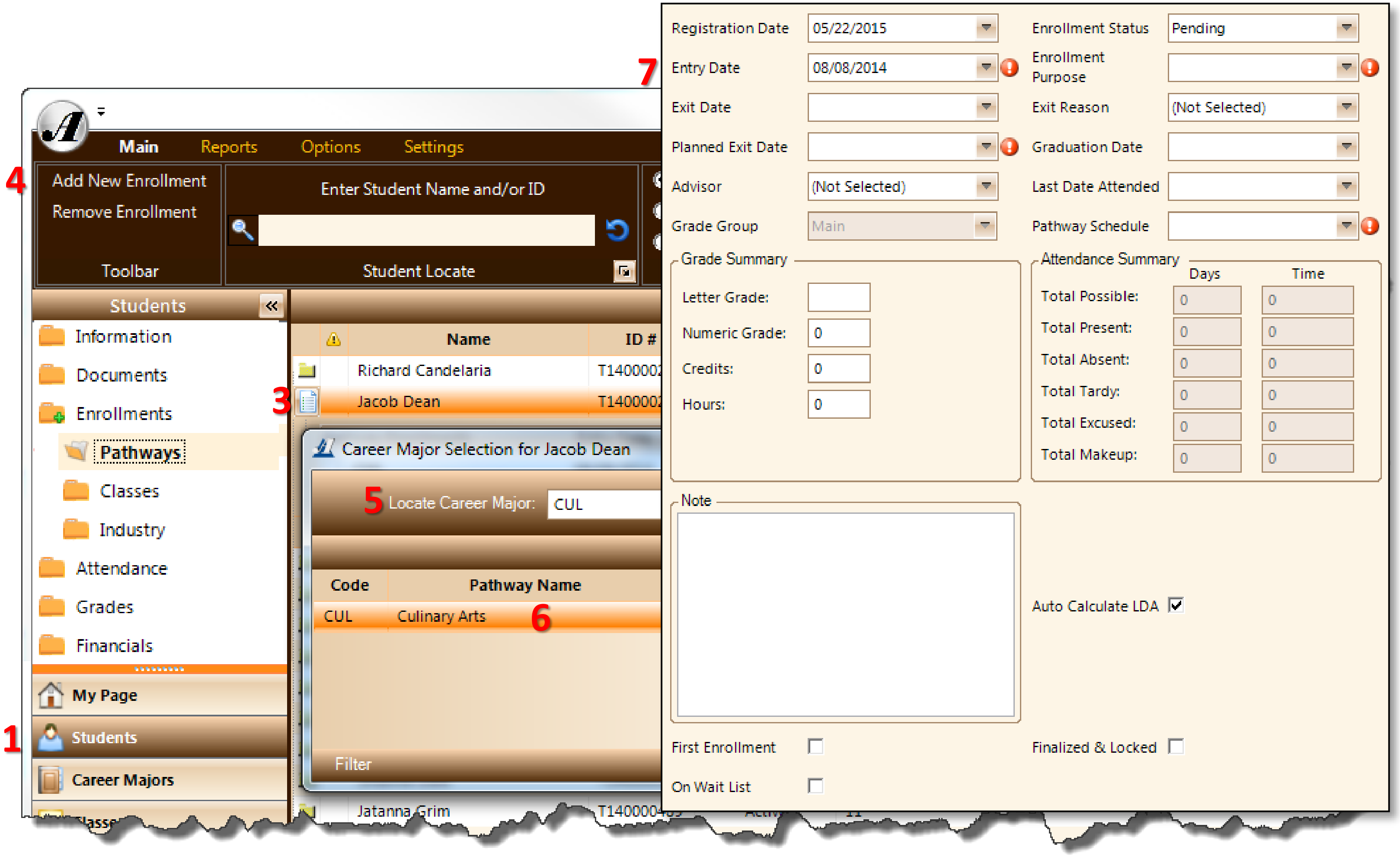
Registering a Student in a Pathway

BASICS

1. Select the Student Module
2. Choose the Enrollment > Pathway Session
3. Locate and select the desired Student in the List Panel
4. On the ribbon, select “Add New Enrollment”
5. In the pop up dialog, search for the Pathway in which to register the student
6. Double-click on the desired Pathway to select
7. In the Detail Panel, complete the required fields, among other applicable data
8. Click “Save”

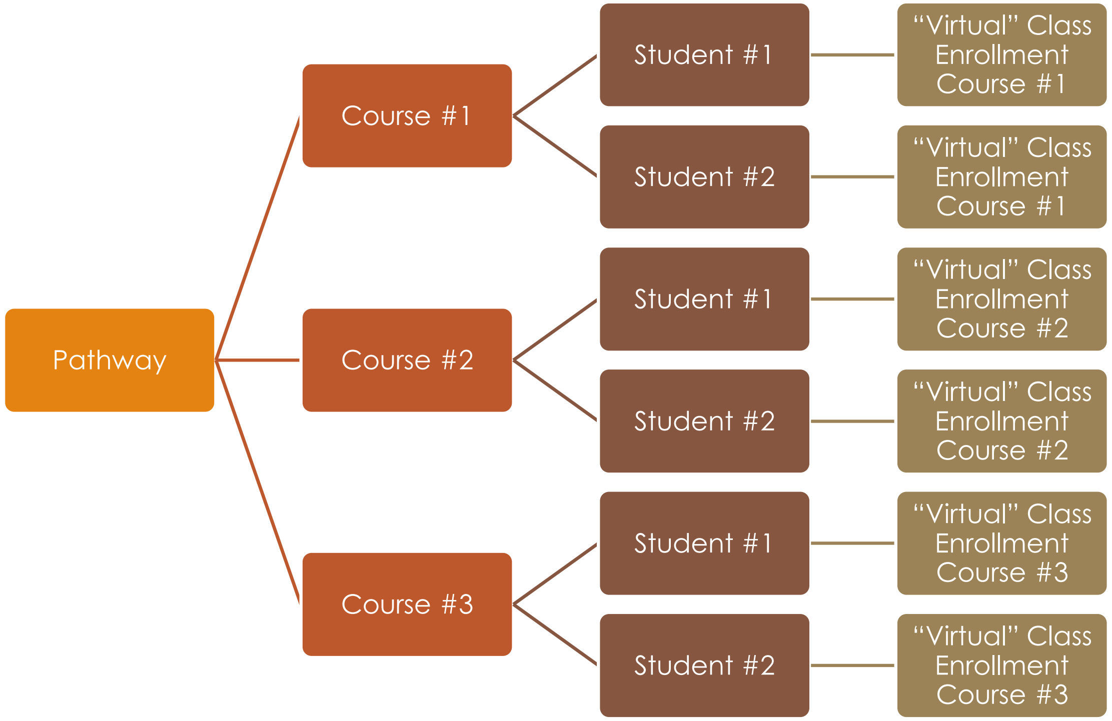
Pathway Registrations can be entered from the Student Module or the Pathway Module.

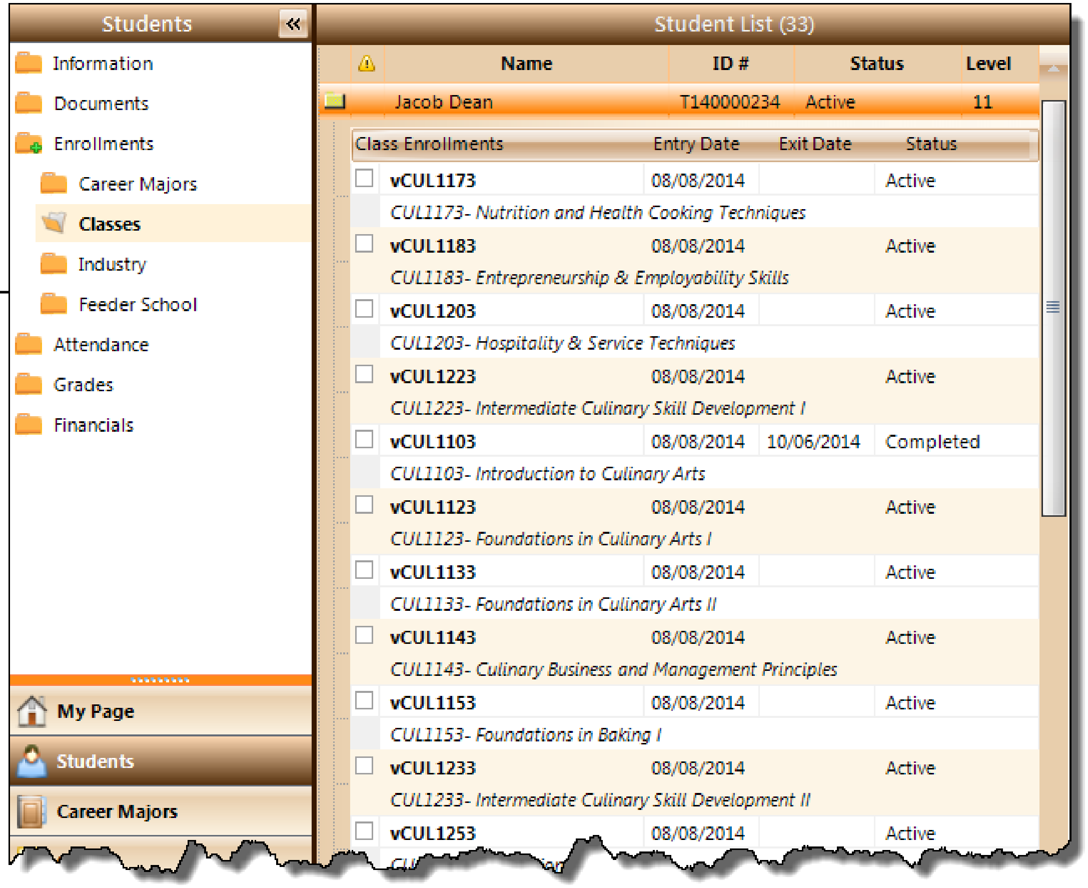
- Enrollment from the Student Module requires the user to select the Pathway when adding a new enrollment.
- Enrollment from the Pathway Module requires the user to select the Student when adding a new enrollment.



Pathway Enrollment (continued)

Things to know…





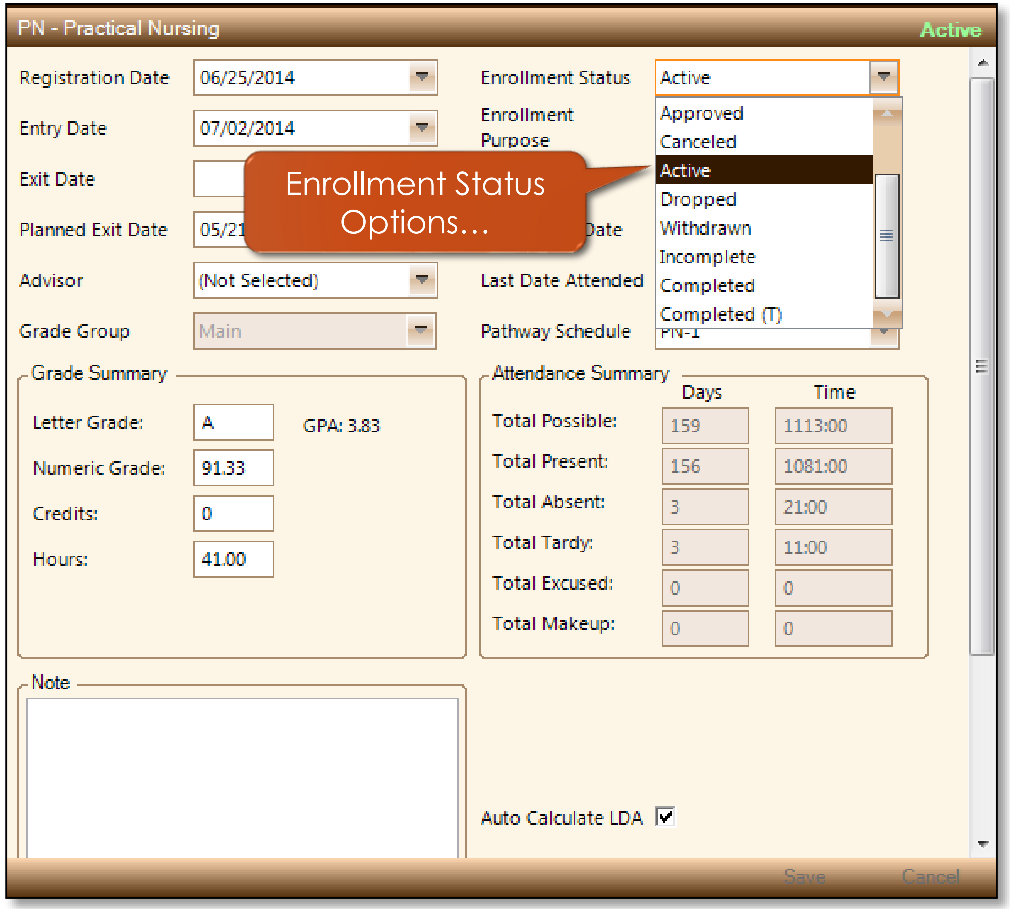
By registering & enrolling a student into a Pathway, the system will automatically create the student's Class enrollment records for each of the Pathway's associated Courses.

Student Enrollment Statuses

Enrollment statuses define the association a student has with a program or course.

These statuses can be broken down into categories as follows:

- **Pre-registration**
  - Interest
  - Pending
  - Pending (T)
- **Registration**
  - Approved
  - Canceled
  - Dropped
- **Enrollment**
  - Active
  - Completed
  - Completed (T)
  - Incomplete
  - Withdrawn



Student Enrollment Statuses
Pre-registration

Interest **–** This option associates the student with a pathway/class as one of an inquiry only. At this stage, no fees are charged, no documents are required, etc. This option is mostly used for marketing purposes and will likely be populated using the Online Registration system, especially for those programs where students must apply to enter.

Not Transcripted

Pending **–** This option is set when the student applies (thus decides to move forward). At this time, documents may be required, fees may be charged as applicable, etc. Likely, when entered by staff, this is the default for pathway enrollments. For classes, which usually require payment up front, a better default would be Approved.

Pending (T) **–** This option specifies that the course was completed at another institution, though has yet to be approved – i.e. set to Completed (T). When this option is used, the Transfer School should also be included.

Not Transcripted

Student Enrollment Statuses
Registration

***Approved* –** This option is set when the student has met all requirements necessary to enter the pathway/class. Their account is usually charged at this time and they are considered pre-rostered.

Not Transcripted

***Canceled* –** A cancellation will likely occur on a 'registration', thus is usually the chosen option for those registrations that were terminated before the start of class. Note that this option may still be selected once the student has gone Active as well. A Canceled status is much like a "deletion" in that it will only be available for marketing purposes and not used for any state or federal reporting.

Not Transcripted

Student Enrollment Statuses

Enrollment

***Active* –** This option is synonymous for "Enrolled", as this is when the registration is officially classified as an enrollment and thus the student is responsible for the associated work. At this stage, the student either has to Complete (transcribed), Withdraw (transcribed), or Drop (not transcribed – time set by policy).

Not Transcripted

***Dropped* –** Just as a cancellation can only occur on a registration, a drop can only occur on an enrollment. This option is set when the student leaves the class/pathway early enough that the enrollment may not be transcripted. This status is another that is not reported on state or federal reports, as it is in effect a cancellation, though after the registration was considered an enrollment. However, due to policy, the student left the class/pathway early enough in the schedule that they may get a partial refund and avoid transcription.

Not Transcripted

Student Enrollment Statuses

Enrollment (continued)

***Withdrawn* –** This option is used when the student leaves the class/pathway before finishing the curriculum and thus did not receive a final grade. When transcripted, **which it will be**, it will show the student's grade as a "W" and no hours or attempted/earned credits will be assigned.

Transcripted

***Incomplete* –** This option is set when the student has met all the schedule requirements, however some academic requirements are still outstanding and no final grade has been issued. An Incomplete should never be considered a "final" status, as they should be resolved with a grade within a certain amount of time. By default, Achademix allows 6 months to resolve the enrollment before notifications begin.

Transcripted

Student Enrollment Statuses
Enrollment (continued)

***Completed* –** This is set when the student has finished all the academic and schedule requirements of the pathway/class. This doesn't mean that they have paid in full, returned all post-enrollment documents, etc. It simply states they completed the curriculum and a final grade has been awarded.

Transcripted

***Completed (T)* –** This option specifies that the course was completed at another institution and should be transcribed with different properties than a Complete. When this option is used, the Transfer School should also be included. When transcripted, these courses may calculate in the GPA, or not as set by policy.

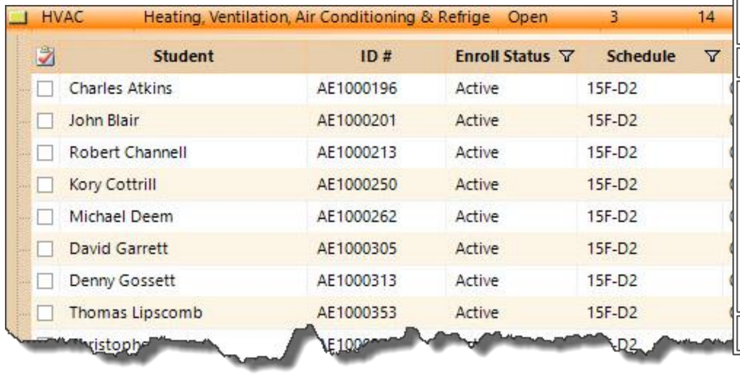
Transcripted

Pathway Rosters

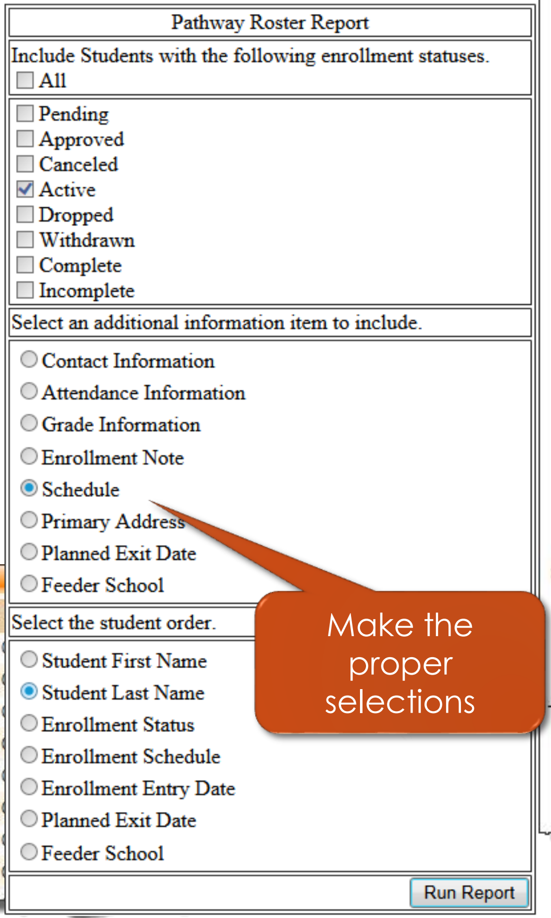
Once the students are enrolled, the Pathway Roster can be generated to display student's by their schedule – 1516F, 1516S, etc.

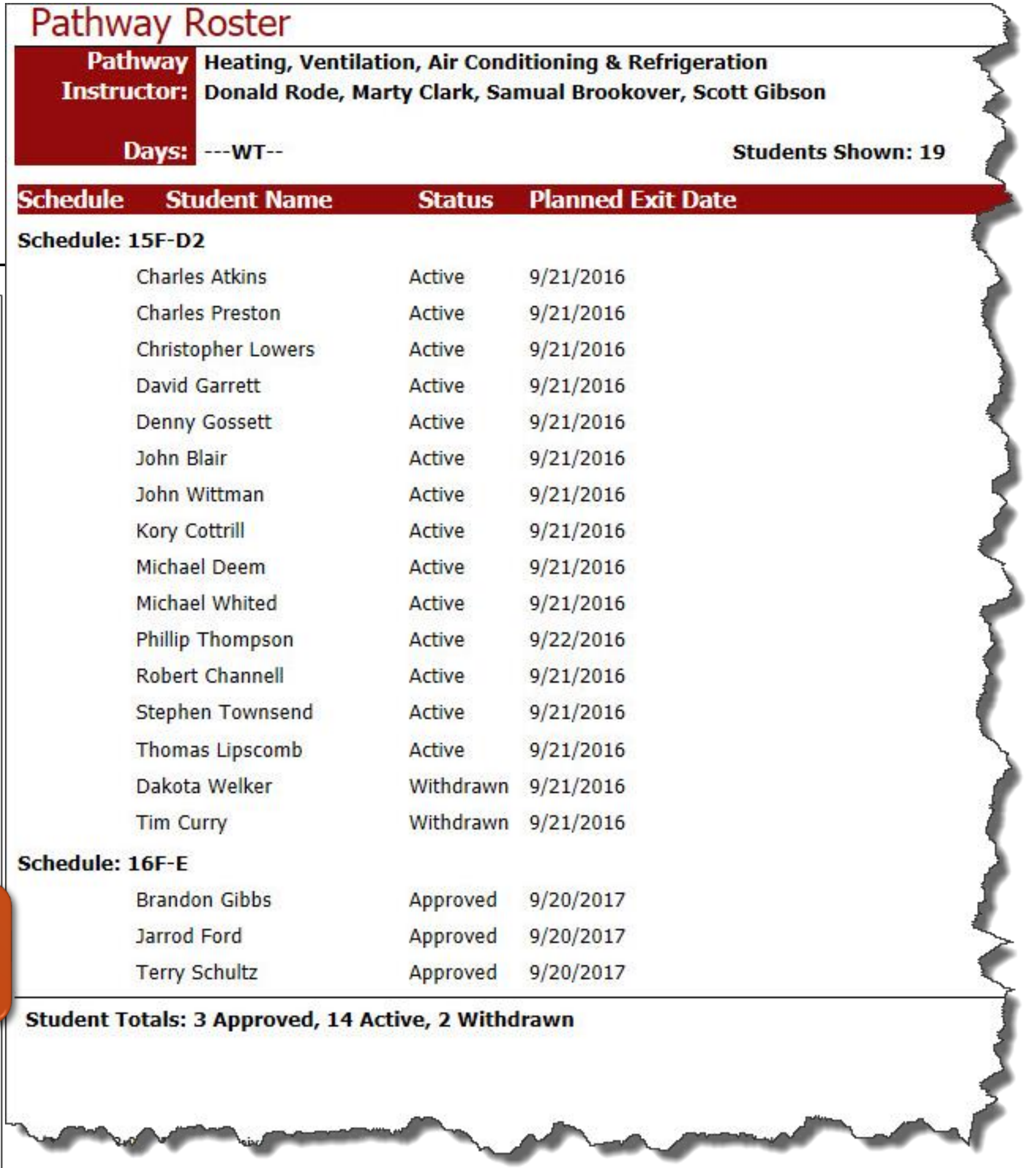
To run the Pathway Roster, navigate to Pathways > Enrollment > Reports > Pathway Enrollment Roster.

Note that from this Enrollment session, you can view all the enrollments right on the screen. Remember, clicking on the headers, such as the Schedule header, will sort by that column.



	Student	ID #	Enroll Status	Schedule
HVAC	Heating, Ventilation, Air Conditioning & Refrige	Open	3	14
☐	Charles Atkins	AE1000196	Active	15F-D2
☐	John Blair	AE1000201	Active	15F-D2
☐	Robert Channell	AE1000213	Active	15F-D2
☐	Kory Cottrill	AE1000250	Active	15F-D2
☐	Michael Deem	AE1000262	Active	15F-D2
☐	David Garrett	AE1000305	Active	15F-D2
☐	Denny Gossett	AE1000313	Active	15F-D2
☐	Thomas Lipscomb	AE1000353	Active	15F-D2





Pathway Roster

Pathway: Heating, Ventilation, Air Conditioning & Refrigeration
Instructor: Donald Rode, Marty Clark, Samual Brookover, Scott Gibson
Days: ---WT--
Students Shown: 19

Schedule	Student Name	Status	Planned Exit Date
Schedule: 15F-D2			
	Charles Atkins	Active	9/21/2016
	Charles Preston	Active	9/21/2016
	Christopher Lowers	Active	9/21/2016
	David Garrett	Active	9/21/2016
	Denny Gossett	Active	9/21/2016
	John Blair	Active	9/21/2016
	John Wittman	Active	9/21/2016
	Kory Cottrill	Active	9/21/2016
	Michael Deem	Active	9/21/2016
	Michael Whited	Active	9/21/2016
	Phillip Thompson	Active	9/22/2016
	Robert Channell	Active	9/21/2016
	Stephen Townsend	Active	9/21/2016
	Thomas Lipscomb	Active	9/21/2016
	Dakota Welker	Withdrawn	9/21/2016
	Tim Curry	Withdrawn	9/21/2016
Schedule: 16F-E			
	Brandon Gibbs	Approved	9/20/2017
	Jarrod Ford	Approved	9/20/2017
	Terry Schultz	Approved	9/20/2017

Student Totals: 3 Approved, 14 Active, 2 Withdrawn

ACHADEMIX: MANAGING STUDENT ACTIVITY (PART 1) – STUDENT ENROLLMENT

Direct Payments

What is a Direct Payment?

Achademix refers to a direct payment as any form of collecting "real" money, such as:

- Cash
- Check
- Credit Card
- EFT (Electronic funds transfer)

In other words, a direct payment will result in money that will appear on that day's deposit report.

Entering an Account Payment

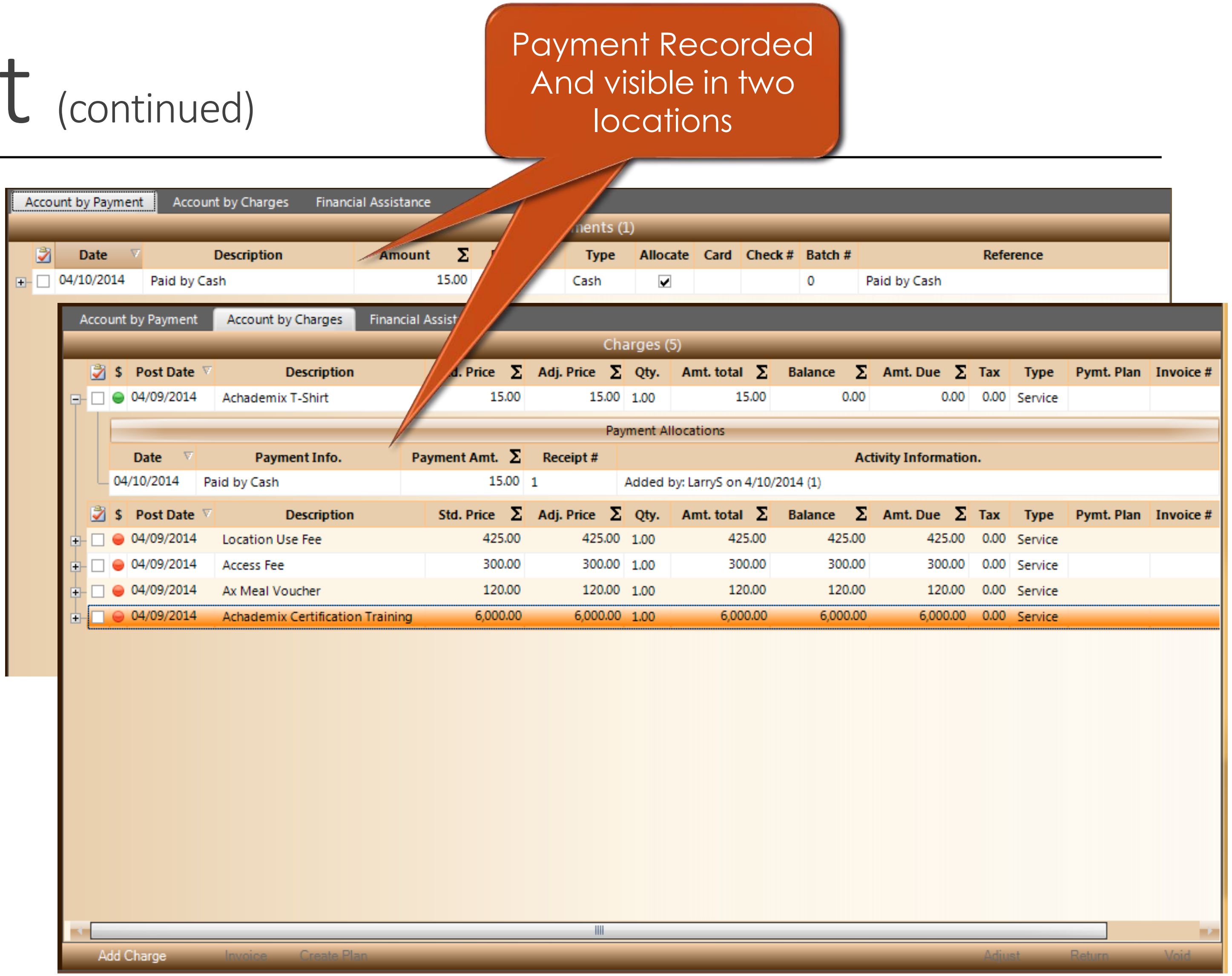
BASIC

1. Locate the account where to post the payment (choose the Module and perform a Search)
2. Select the Financials Session
3. Click on "Take Payment" in the Ribbon
4. Enter the payment amount
5. Use the "Pay" buttons or the payment fields to allocate the payment to charges with unpaid balances
6. Select the payment type and complete the applicable information (if any).
7. Click on the "Save Payment Info." button to record the payment

Notice: You cannot post (save) the payment until it is completely allocated.

Direct Payment (continued)

Now that we have taken a direct payment we can see that payment on both the “Account by Payment” tab and the “Account by Charges” tab (when viewing the detail under the paid charge.)



Notice: A Payment cannot be voided if it has been refunded. Also, a Payment can not be voided after the day it is entered (as it has been deposited).

Review Account Payments

While in a Financials Session, it is easy to review the payments on the account by selecting the “Account by Payment” tab.

Columns

- **Date** – Date payment was received
- **Description** – Information about the payments type or source.
- **Amount** – Amount of the payment
- **Receipt** # - The receipt number
- **Allocate** – check indicates that the payment is allocated
- **Card** / **Check #** - Credit card (last four) or check #
- **Reference** – Additional reference information entered with the payment

Payment Receipt

The information on the receipt explains to the student how much of their total payment was paid to specific charges on their account.

Note that you can reprint a receipt at any time by locating the payment and right-clicking on it.

Northeast Technology Center
6195 W. Highway 20
Pryor, OK 74362
Phone: 918-825-5555

Receipt of Payment

Receipt # A106A

Received By: 3

Daffy Duck

Payment		Method	Received
5/19/2015	Paid by Check	Check# 12011	$274.00

Charge		Allocation
5/19/2015	Supply Fee - Sem 1	$75.00
5/19/2015	Welding On-Line Curriculum Access Fee	$99.00
5/19/2015	Welding Textbooks	$100.00

Daily Deposit Report by Income Account

This report is to be accompanied by the money received for the day. The amount of money (cash, checks, credit card slips) should all match the totals shown on this report before submission. The Deposit Report can be found under My School > Reports

Daily Deposit Report

Received: Tuesday, May 19, 2015
Users: All

Total Deposit $274.00

Charged	Charge Description	Account	Paid	Receipt #	User	Cash	Check	Credit	EFT
Cost Center: 0001-002									
5/19/2015	Welding On-Line Curriculum Access Fee	Daffy Duck	5/19/2015	A106A	BrianH		$99.00		
5/19/2015	Welding Textbooks	Daffy Duck	5/19/2015	A106A	BrianH		$100.00		
			0001-002 Cost Center Totals:		**$199.00**	$0.00	$199.00	$0.00	$0.00
Cost Center: 0001-003									
5/19/2015	Supply Fee - Sem 1	Daffy Duck	5/19/2015	A106A	BrianH		$75.00		
			0001-003 Cost Center Totals:		**$75.00**	$0.00	$75.00	$0.00	$0.00
					Totals:	$0.00	$274.00	$0.00	$0.00
					Total Deposit:	**$274.00**			

Daily Deposit Report

Received: Tuesday, May 19, 2015
Users: All

Total Deposit $274.00

Receipt Number

Who received the payment

Method of payment

Charged	Charge Description	Account	Paid	Receipt #	User	Cash	Check	Credit	E
Cost Center: 0001-002									
5/19/2015	Welding On-Line Curriculum Access Fee	Daffy Duck	5/19/2015	A106A	BrianH		$99.00		
5/19/2015	Welding Textbooks	Daffy Duck	5/19/2015	A106A	BrianH		$100.00		
	0001-002 Cost Center Totals:				**$199.00**	$0.00	$199.00	$0.00	$0.00
Cost Center: 0001-003									
5/19/2015	Supply Fee - Sem 1	Daffy Duck	5/19/2015	A106A	BrianH		$75.00		
	0001-003 Cost Center Totals:				**$75.00**	$0.00	$75.00	$0.00	$0.00
					Totals:	$0.00	$274.00	$0.00	$0.00
					Total Deposit:	**$274.00**			

Revenue Account Totals

Receipt # A106A

Received By: 3

Payment		Method	Received
5/19/2015	Paid by Check	Check# 12011	$274.00

Charge		Allocation
5/19/2015	Supply Fee - Sem 1	$75.00
5/19/2015	Welding On-Line Curriculum Access Fee	$99.00
5/19/2015	Welding Textbooks	$100.00

All information provided on the receipt that is given to the student is also found on the deposit report. This relieves the school of having to print their own copy of the receipt, as:

1. the data is stored in the system and be reprinted at anytime, and

2. the information is submitted on a comprehensive report lessening paper usage (cost of paper/ink/printer maintenance/etc.).

This concludes your training exercise.

Achademix: Student Management (Part 1)

In this session, we covered entering student records, tracking required documents and assessment scores, entering notes and registering/enrolling students into classes.

Make sure you understand how to work with students in Achademix and let us know if you have any questions.

Reference Documents

OSB7 - Student Search Directives
OSB8 - Pathway & Class Search Directives
OSB13 - Student Required Document Tracking
OSB17 - Student Status vs. Enrollment Status
OSB21 - External Testing & Assessments

www.Achademix.net

All Processes shown and presented are subject to change without notice.