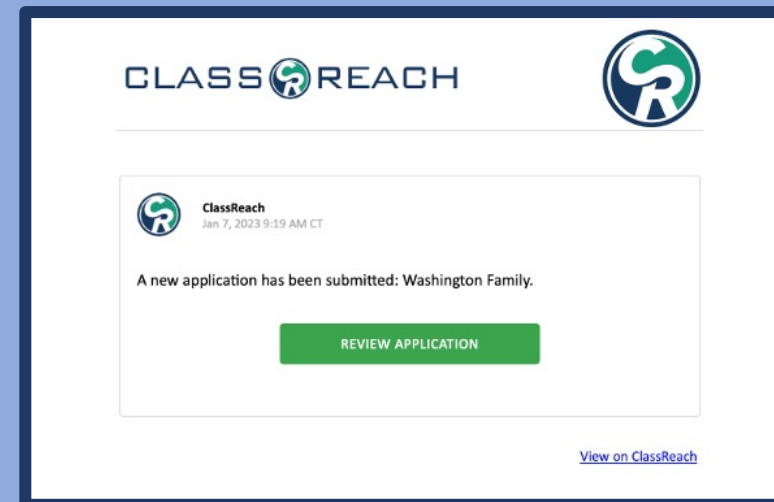




Applications & Admissions Workflow

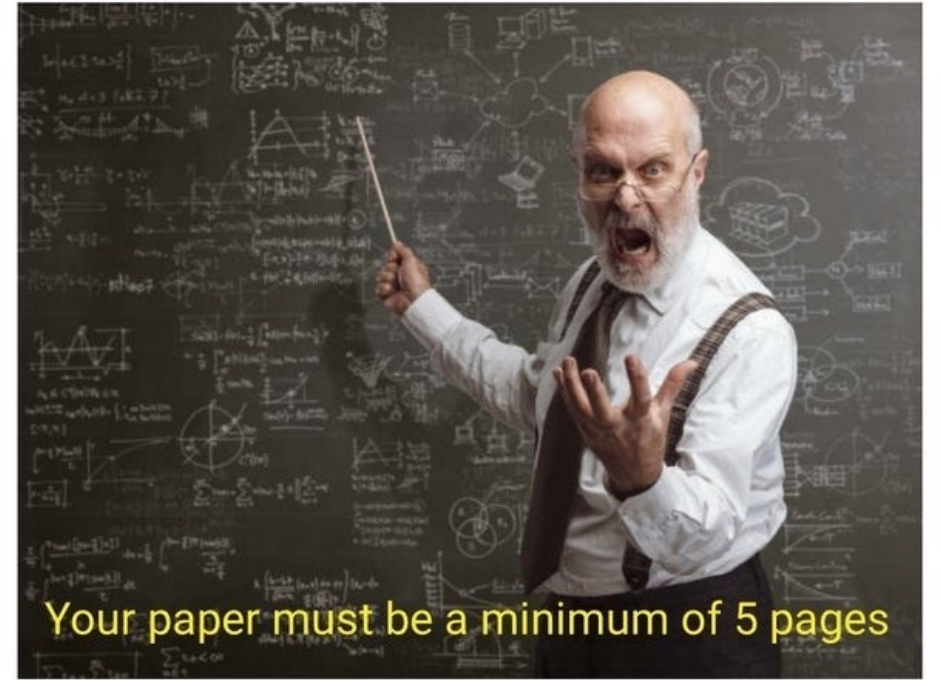
2024-2025

Steve and Amy Maus



References

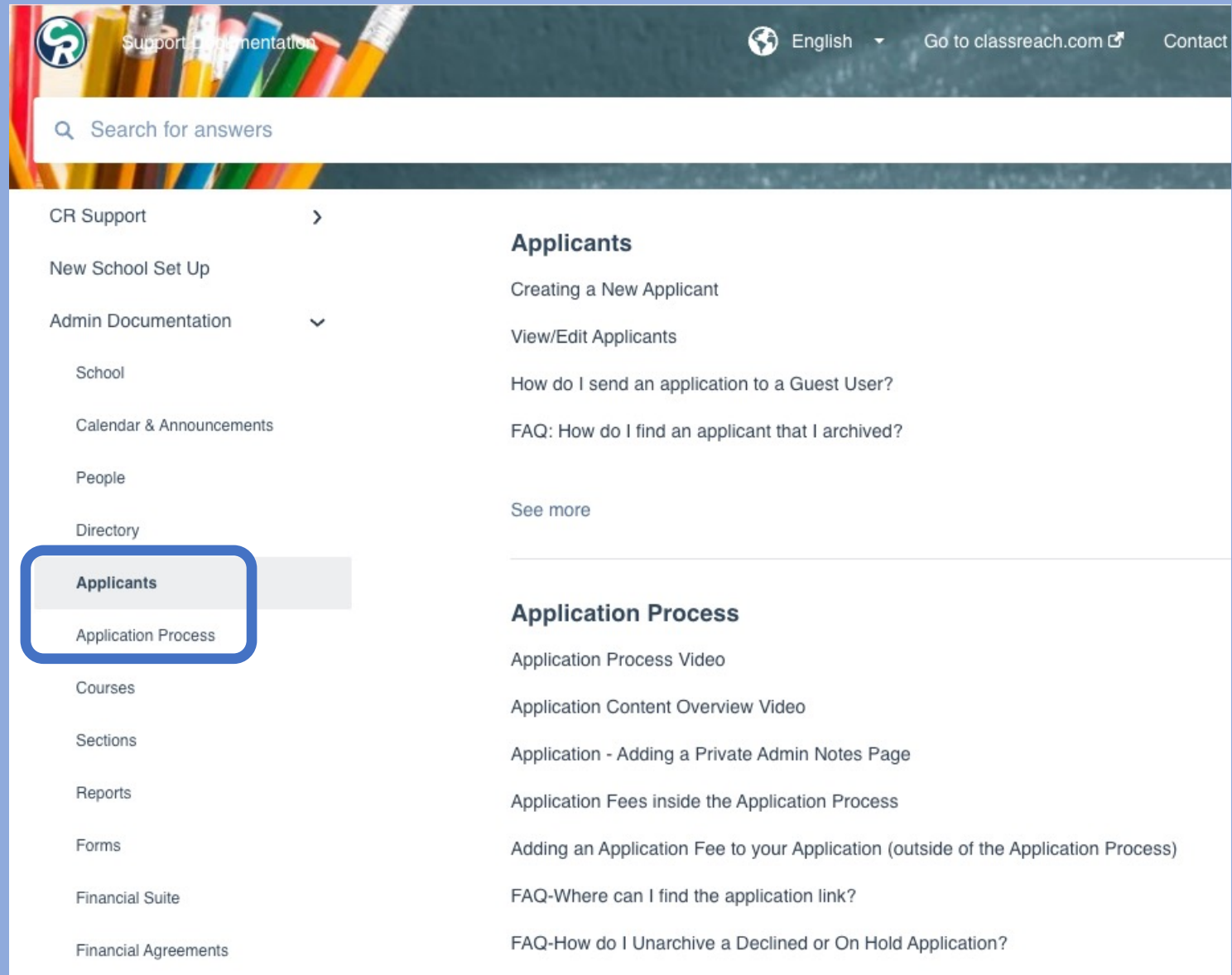
Schools:



The Real World:



References



The screenshot shows the ClassReach website interface. At the top, there is a navigation bar with the ClassReach logo, a search bar, and links for 'Support Documentation', 'English', 'Go to classreach.com', and 'Contact'. Below the navigation bar is a search bar with the text 'Search for answers'. The main content area is divided into two columns. The left column contains a navigation menu with the following items: 'CR Support', 'New School Set Up', 'Admin Documentation', 'School', 'Calendar & Announcements', 'People', 'Directory', 'Applicants', 'Application Process', 'Courses', 'Sections', 'Reports', 'Forms', 'Financial Suite', and 'Financial Agreements'. The 'Applicants' item is highlighted with a blue rounded rectangle. The right column contains two sections: 'Applicants' and 'Application Process'. The 'Applicants' section includes links for 'Creating a New Applicant', 'View/Edit Applicants', 'How do I send an application to a Guest User?', 'FAQ: How do I find an applicant that I archived?', and 'See more'. The 'Application Process' section includes links for 'Application Process Video', 'Application Content Overview Video', 'Application - Adding a Private Admin Notes Page', 'Application Fees inside the Application Process', 'Adding an Application Fee to your Application (outside of the Application Process)', 'FAQ-Where can I find the application link?', and 'FAQ-How do I Unarchive a Declined or On Hold Application?'.

Support Documentation

English

Go to classreach.com

Contact

Search for answers

CR Support

New School Set Up

Admin Documentation

School

Calendar & Announcements

People

Directory

Applicants

Application Process

Courses

Sections

Reports

Forms

Financial Suite

Financial Agreements

Applicants

Creating a New Applicant

View/Edit Applicants

How do I send an application to a Guest User?

FAQ: How do I find an applicant that I archived?

See more

Application Process

Application Process Video

Application Content Overview Video

Application - Adding a Private Admin Notes Page

Application Fees inside the Application Process

Adding an Application Fee to your Application (outside of the Application Process)

FAQ-Where can I find the application link?

FAQ-How do I Unarchive a Declined or On Hold Application?

Overview

- Types of Applications
- Application Settings
- The Application Process
- Editing the Application
- The Inquiry Form
- Admissions Workflow

**This webinar assumes a basic understanding of ClassReach applications and the application process

There are TWO Applications!

1. Family Application

2. Student Application

The Student Application

The screenshot displays the 'User Profile' page for a user named 'Toucan'. The page is divided into several sections:

- User Profile:** A red header bar with the text 'User Profile'. Below it is a navigation bar with tabs for 'Bird', 'Teresa (You)', 'Larry', 'Big', 'Tweety', 'Baby', 'Dave', and 'Toucan'. The 'Toucan' tab is currently selected.
- Bird Family:** A section with a red header bar containing the text 'Bird Family'. Below it is a navigation bar with tabs for 'Directory (New)', 'General', 'Contacts', 'Medical', and 'Settings'. The 'Settings' tab is currently selected.
- Student Applications:** A red header bar with the text 'Student Applications'. Below it is a table with one row of data:

Student Name	Status	Start Date	Action
Toucan	Approved	Started on Oct 26, 2023	Go to Application

Below the table is a green button with a plus sign icon and the text 'New Student Application'.

- [School Settings](#)
 - [School Information](#)
 - [Login Page Settings](#)
 - [Billing](#)
 - [Academic Levels](#)
 - [Academic Terms](#)
 - [Grading Units](#)
 - [Data Copier](#)
 - [Imports](#)
- [People Settings](#)
 - Applications**
 - [People Forms](#)
 - [Directory \(NEW\)](#)
- [Course Settings](#)
 - [Course Options](#)
 - [Course Registration](#)
 - [Departments](#)

Applications

- Application Forms
- Application Fees
- Confirmations
- Notification Subscribers
- Applicant Emails
- Affirmation

Your school's application link is

<https://classreach.classreach.com/Apply>

The forms contained below are intended to act as pages in the application process. A new family application will have a digital page following order: Family, Guardians, Students. Before submitting the application families have the opportunity to review the complete summary page and make any needed changes before submitting.

Existing families/students are directed to the student application using the same link from above.

Important Notes: Guardian Names, Student Names, Guardian Emails, Application Year, and Academic Level are all included as default. You DO NOT need to add those fields to your form.

Family Application Form

This form is part of your school's online Application process. Applicants will be asked to fill out this information for their Family when applying.

Guardian Application Form

This form is part of your school's online Application process. Applicants will be asked to fill out this information for each Guardian in their Family when applying.

Student Application Form

This form is part of your school's online Application process. Applicants will be asked to fill out this information for each Student in their Family when applying.

Applications

Applications

- Application Forms
- Application Fees
- Confirmations
- Notification Subscribers
- Applicant Emails
- Affirmation**

Require Affirmation before starting Application?

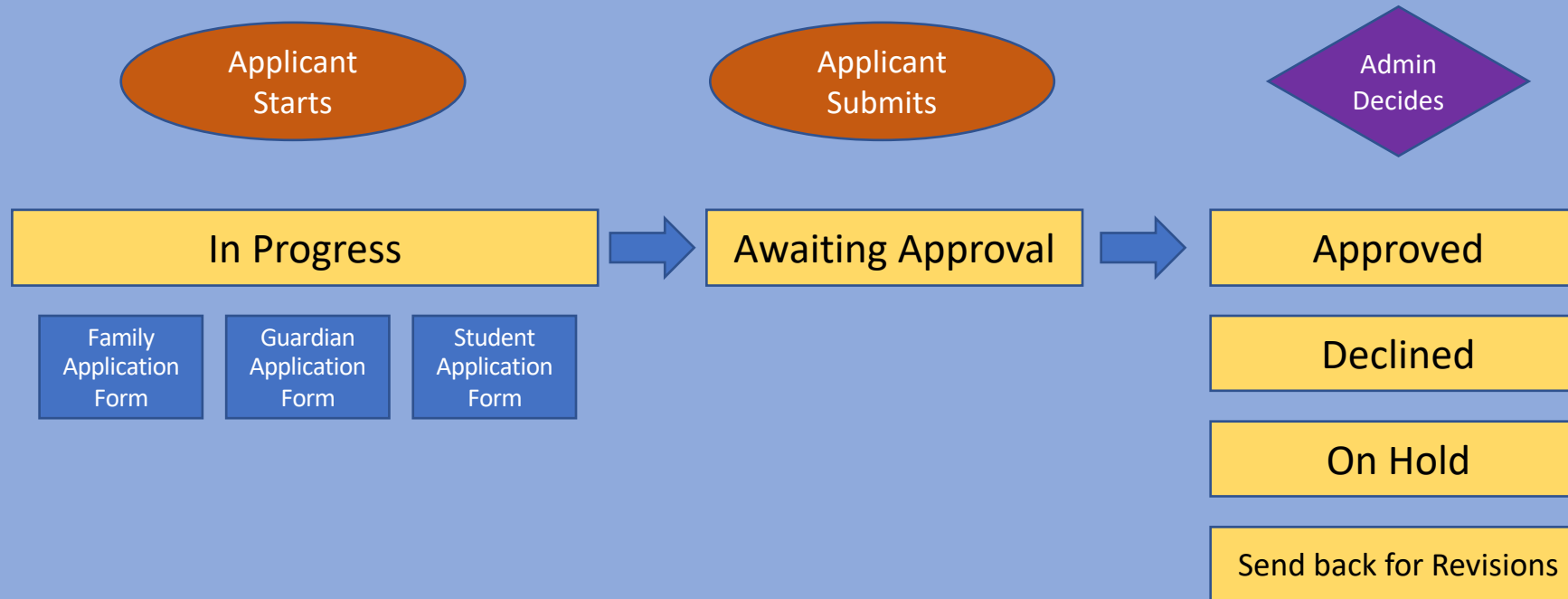
 Yes

Affirmation

Affirmation Description

At our school, we require that prior to submitting an application that you attend a Family Information Meeting. These are scheduled every Monday night from 7:00-8:00 at the school between January and March. Please contact the office at xxx-xxx-xxxx to add you name to our list for one of those meetings. After attending we'd be happy to consider your application.

[School Information](#)[Login Page Settings](#)[Billing](#)[Academic Levels](#)[Academic Terms](#)[Grading Units](#)[Data Copier](#)[Imports](#)



The Application Process

Applicant Starts

Applicant clicks "Apply" link

Applicant goes to ClassReach /apply page

Applicant enters email address and clicks "Submit"


Applicant clicks "Begin Application" link

Applicant enters name, affirms statement by checking the box

Applicant Clicks Begin Application

In Progress

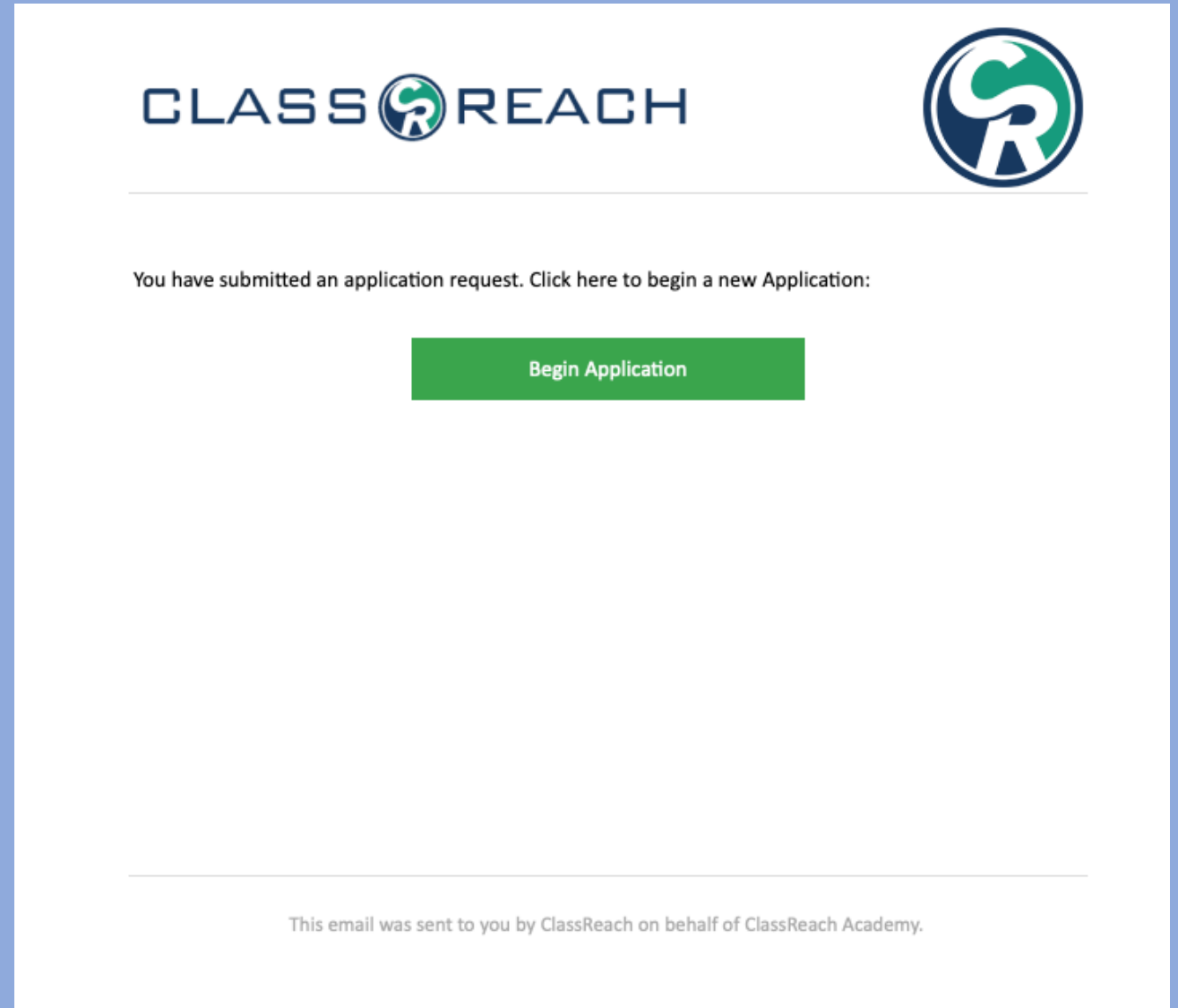
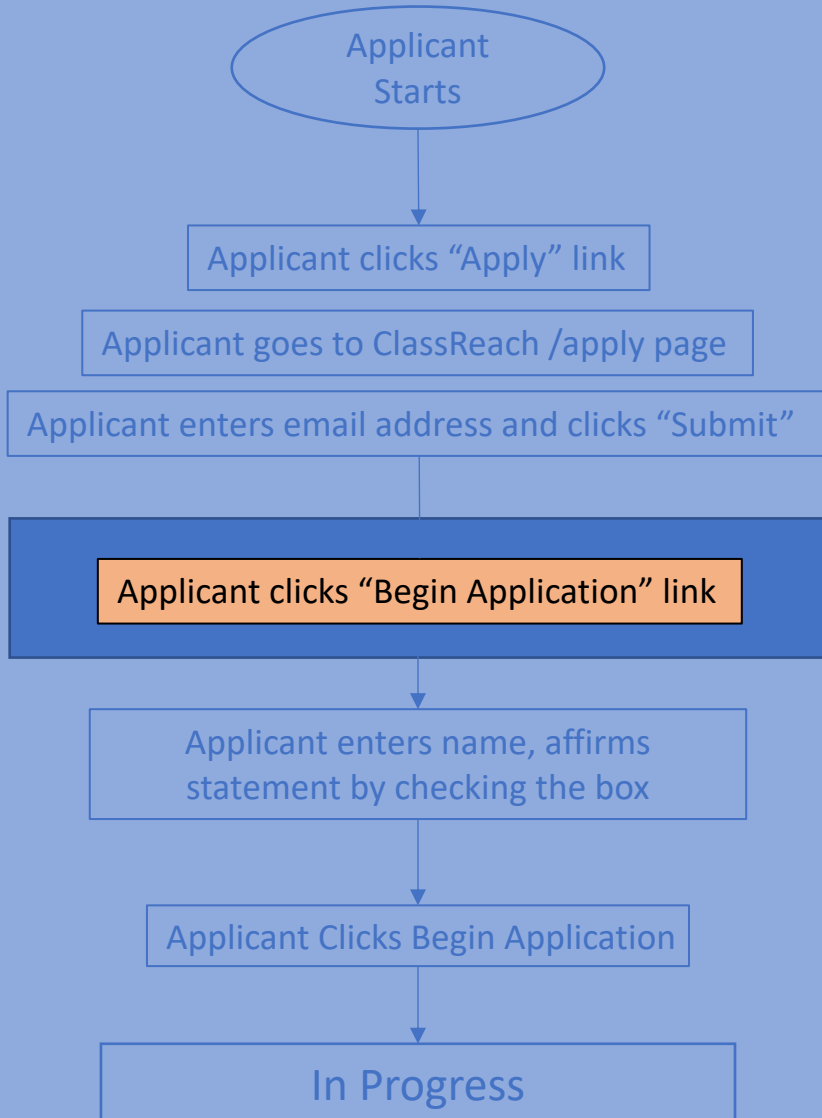
ClassReach Academy



Application for ClassReach Academy

Please enter your email address below. A verification email will be sent to the submitted address, if you do not receive this correspondence, please check your spam folder for messages from no-reply@classreach.com.

Email*



Applicant Starts

Applicant clicks "Apply" link

Applicant goes to ClassReach /apply page

Applicant enters email address and clicks "Submit"

Applicant clicks "Begin Application" link

Applicant enters name, affirms statement by checking the box

Applicant Clicks Begin Application

In Progress

Application for ClassReach Academy

Please fill out the information below to get started with your application.

First Name ⓘ *

Last Name ⓘ *

Email

steve.maus@classreach.com

I affirm that I have attended a Family Information Meeting.

At our school, we require that prior to submitting an application that you attend a Family Information Meeting. These are scheduled every Monday night from 7:00-8:00 at the school between January and March. Please contact the office at xxx-xxx-xxxx to add you name to our list for one of those meetings. After attending we'd be happy to consider your application.

 Begin Application

One Family Application

In Progress

Applicant Submits Application

Awaiting Approval

Family
Information
Page 1

Guardian
Information
Page 2

Student
Information
Page 3

Admins work on the application as 3 separate forms as seen here.

People Page

Application is now showing as “In Progress”
on the People Page of the Admin account

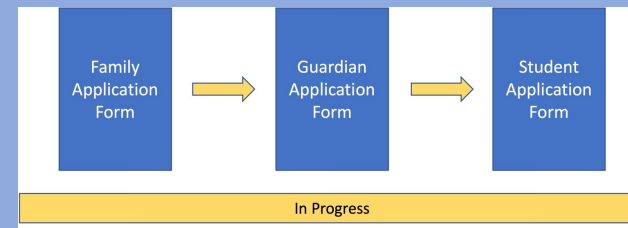
In Progress

Applicant Submits Application

Awaiting Approval

The screenshot shows the CLASS REACH interface. At the top, there is a navigation bar with the CLASS REACH logo, a 'Need Assistance?' button, and a user profile for 'ClassReach Support Admin'. Below this is a secondary navigation bar with tabs for 'School', 'People', 'Courses', 'Reports', 'Forms', 'Financial', 'Messages', 'Discussions', 'Calendar', and 'Settings'. The 'People' tab is active. A search bar is present on the left. The main content area is titled 'People Results' and contains a table of application entries. The 'In Progress' filter is selected in the left sidebar. The table lists three entries: Davis (Applicant - In Progress), Uzumaki (Applicant - In Progress), and Washington (Applicant - In Progress). The Washington entry is highlighted with a red box, and its details are shown in a sub-table below it.

Filter	People Results
Conflicted	<input type="checkbox"/> Davis (Applicant - In Progress) Joy Davis
Applicant	<input type="checkbox"/> Uzumaki (Applicant - In Progress) Naruto Uzumaki
Awaiting Approval	<input type="checkbox"/> Washington (Applicant - In Progress) George Washington Patsy Custis Martha Washington Jack Custis
In Progress	
Approved	
Declined	
On Hold	
Course Registration	



Video of the Steps to Complete the Application

In Progress

Applicant Submits Application

Awaiting Approval

New Family Application for ClassReach Academy

Thank you for your interest in our school! All new families must fill out this Application. You will receive further instructions after you have completed the Application.

Family Last Name*

Which School Year are you applying for?*

Save & Exit

Next

Confirmation Screen

This is the screen that comes up for the applicant after they click “Submit Application”

In Progress

Applicant Submits Application

Awaiting Approval

ClassReach Academy



Application Submitted!

Thank you for submitting an Application! We have been notified, and you will be sent an email once we have approved your Application.

Please follow this link to pay the application fee:

[Click Here to Pay Your Application Fee](#)

Notification Email Sent to Admin

In Progress

Applicant Submits Application

Awaiting Approval

CLASS REACH



ClassReach

Jan 7, 2023 9:19 AM CT

A new application has been submitted: Washington Family.

REVIEW APPLICATION

[View on ClassReach](#)

People Page

Application is now showing as “Awaiting Approval”
on the People Page of the Admin account

In Progress

Applicant Submits Application

Awaiting Approval

The screenshot shows the CLASS REACH interface. At the top, there is a navigation bar with 'School', 'People', 'Courses', 'Reports', 'Forms', 'Financial', 'Messages', 'Discussions', 'Calendar', 'Analytics', and 'Settings'. The 'People' tab is selected. Below the navigation bar, there is a search bar and a 'People Results' section. The 'People Results' section contains a list of applicants, each with a checkbox, a name, and a status. The status for all applicants is '(Applicant - Awaiting Approval)'. The 'Awaiting Approval' status is highlighted in a red box. The list of applicants includes: Duck, Family, Gordon, Hicks, Lopez, Newfam, and Ross. Each applicant has a corresponding family name listed to the right.

Grade	Applicant Name	Status	Family Name
10th Grade	Duck	(Applicant - Awaiting Approval)	Donald Duck
11th Grade	Family	(Applicant - Awaiting Approval)	Test Family
12th Grade	Gordon	(Applicant - Awaiting Approval)	Cherith Gordon, Wylie Gordon, Tucker Gordon, Cahill Gordon, Titus Gordon
Another random Academic Level	Hicks	(Applicant - Awaiting Approval)	Don Hicks, Terrigan Hicks
Schedule	Lopez	(Applicant - Awaiting Approval)	Vanessa Lopez, Lola Lopez
Conflicted	Newfam	(Applicant - Awaiting Approval)	Papa Newfam, Daughter Newfam, Mama Newfam, Son Newfam
Applicant	Ross	(Applicant - Awaiting Approval)	Betsy Ross, John Ross, Robert Ross

People Page

Application is now showing as “Awaiting Approval”
on the People Page of the Admin account

In Progress

Applicant Submits Application

Awaiting Approval

CLASS REACH

Need Assistance?

ClassReach Support Admin

School **People** Courses Reports Forms Financial Messages Discussions Calendar Analytics Settings

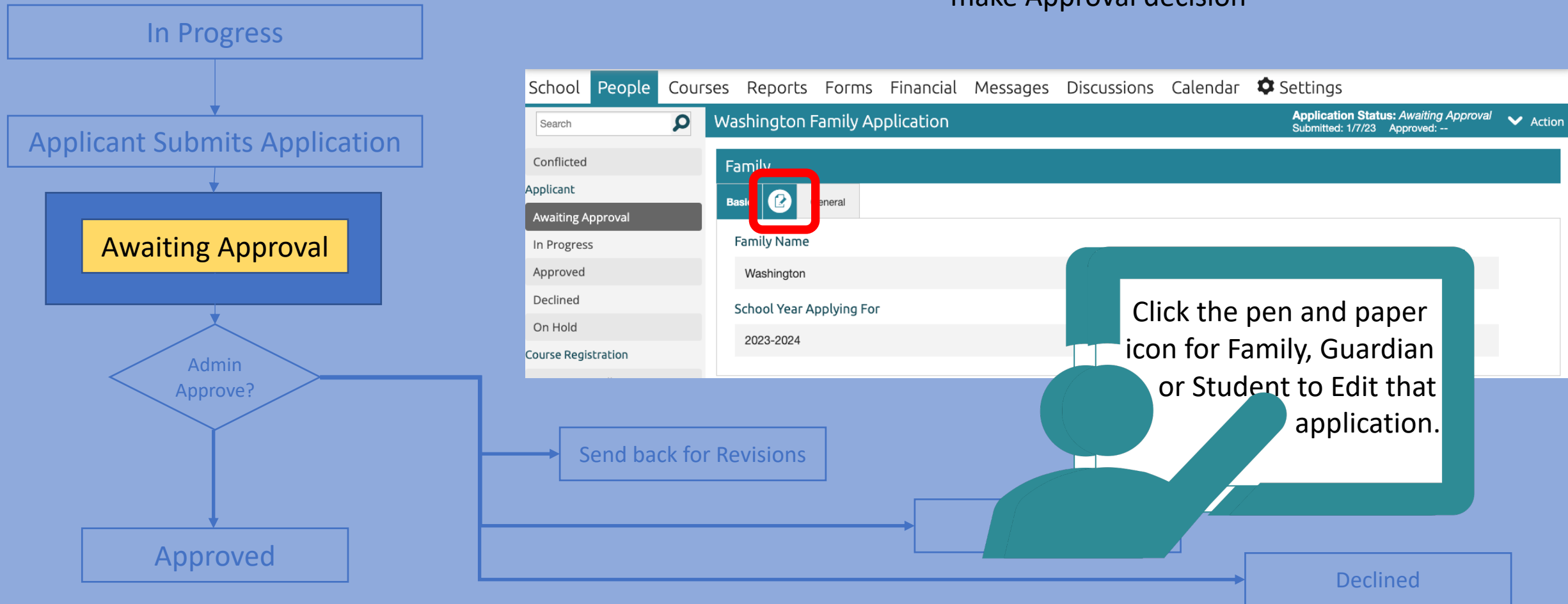
Search People Results

Grade	Applicant	Family Name	First Name	Last Name	Action
10th Grade	<input type="checkbox"/>	Duck (Applicant - Awaiting Approval)	Donald	Duck	
11th Grade	<input type="checkbox"/>	Family (Applicant - Awaiting Approval)	Test	Family	
12th Grade	<input checked="" type="checkbox"/>	Gordon (Applicant - Awaiting Approval)	Cherith	Gordon	Send Welcome Email... Quick Enroll... Archive Convert Guests to Users
Another random Academic Level	<input checked="" type="checkbox"/>	Gordon (Applicant - Awaiting Approval)	Tucker	Gordon	
Schedule	<input type="checkbox"/>	Hicks (Applicant - Awaiting Approval)	Don	Hicks	
Conflicted	<input type="checkbox"/>	Lopez (Applicant - Awaiting Approval)	Vanessa	Lopez	
Applicant	<input type="checkbox"/>	Newfam (Applicant - Awaiting Approval)	Papa Newfa	Mama Newfa	
Awaiting Approval	<input type="checkbox"/>	Ross (Applicant - Awaiting Approval)	Betsy	Ross	
In Progress					
Approved					
Declined					
On Hold					

Send a Welcome Email
Or
Archive the Application

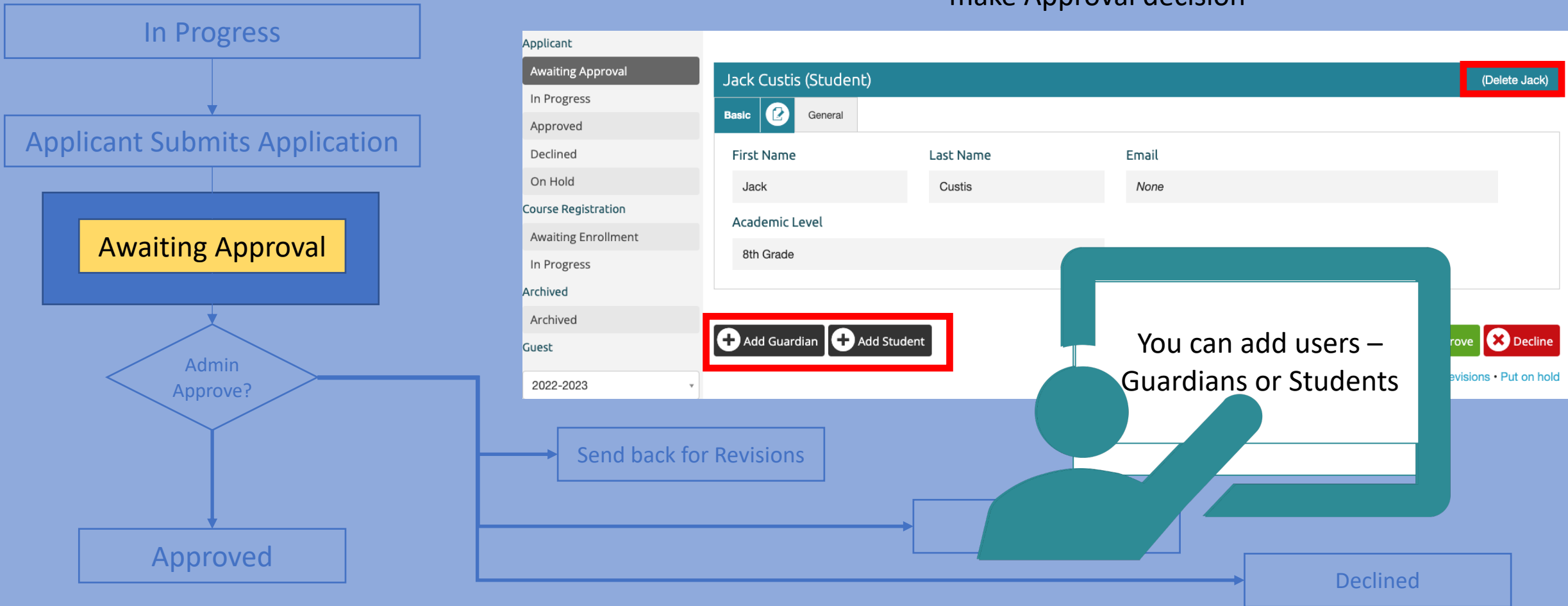
People Page

Admin reads / reviews the Application in order to make Approval decision



People Page

Admin reads / reviews the Application in order to make Approval decision



People Page

Admin clicks on the Application and makes Approval Decision...scroll to bottom of the screen

In Progress

Applicant Submits Application

Awaiting Approval

Admin Approve?

Approved

Send back for Revisions

On Hold

Declined

Applicant

- Awaiting Approval
- In Progress
- Approved
- Declined
- On Hold
- Course Registration
 - Awaiting Enrollment
 - In Progress
- Archived
 - Archived
- Guest

2022-2023

Jack Custis (Student) (Delete Jack)

Basic General

First Name: Jack Last Name: Custis Email: None

Academic Level: 8th Grade

+ Add Guardian + Add Student

Approve Decline

Send back for revisions • Put on hold

Application Sent Back

In Progress

Applicant Submits Application

Awaiting Approval

Admin Approve?

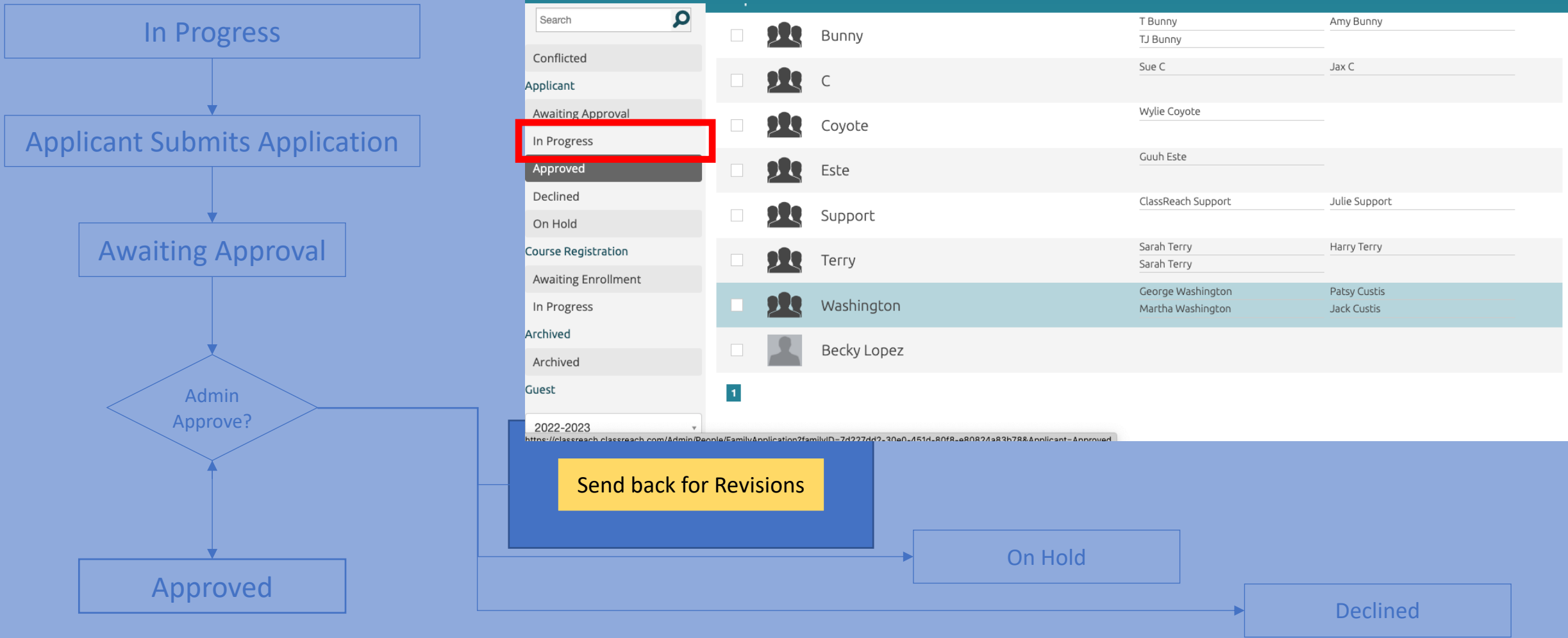
Approved

School	People	Courses	Reports	Forms	Financial	Messages	Discussions	Calendar	Settings
	<input type="checkbox"/> Bunny							T Bunny TJ Bunny	Amy Bunny
	<input type="checkbox"/> C							Sue C	Jax C
	<input type="checkbox"/> Coyote							Wylie Coyote	
	<input type="checkbox"/> Este							Guuh Este	
	<input type="checkbox"/> Support							ClassReach Support	Julie Support
	<input type="checkbox"/> Terry							Sarah Terry Sarah Terry	Harry Terry
	<input checked="" type="checkbox"/> Washington							George Washington Martha Washington	Patsy Custis Jack Custis
	<input type="checkbox"/> Becky Lopez								

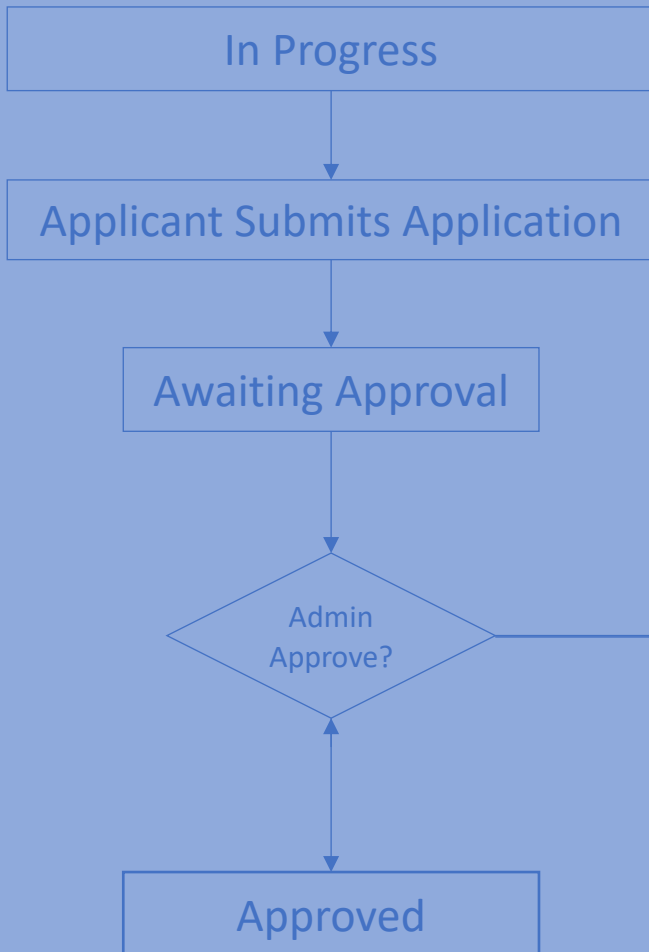
Send back for Revisions

On Hold

Declined



Application moves to Declined



School People Courses Reports Forms Financial Messages Discussions Calendar Settings

Search

<input type="checkbox"/>		Bunny	T Bunny TJ Bunny	Amy Bunny
<input type="checkbox"/>		C	Sue C	Jax C
<input type="checkbox"/>		Coyote	Wylie Coyote	
<input type="checkbox"/>		Este	Guuh Este	
<input type="checkbox"/>		Support	ClassReach Support	Julie Support
<input type="checkbox"/>		Terry	Sarah Terry Sarah Terry	Harry Terry
<input checked="" type="checkbox"/>		Washington	George Washington Martha Washington	Patsy Custis Jack Custis
<input type="checkbox"/>		Becky Lopez		

2022-2023

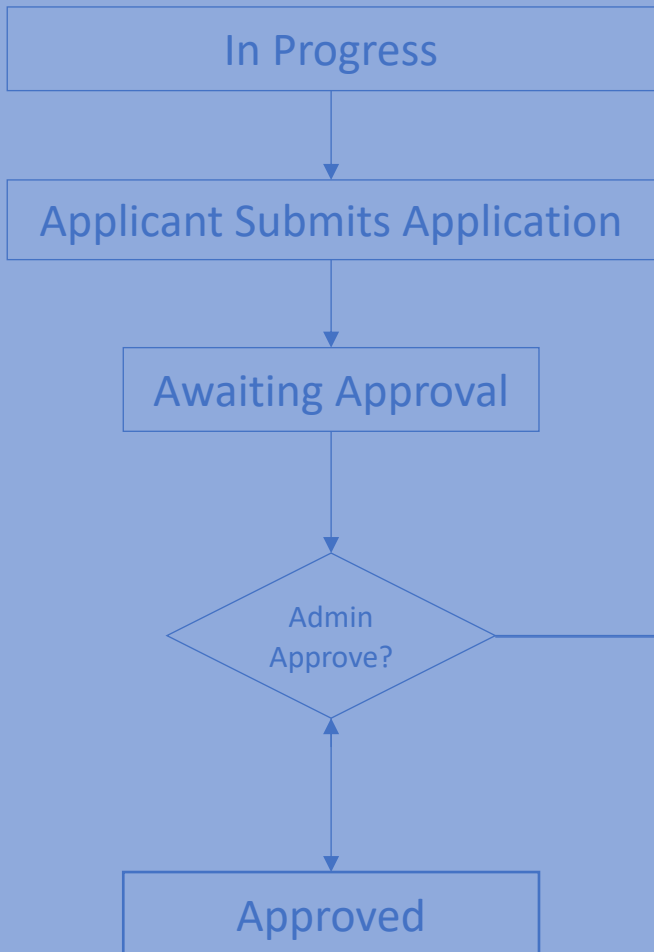
<https://classreach.classreach.com/Admin/People/FamilyApplication?familyID=7d227d42-30e0-451d-80f8-e8082fa83b78&Applicant=Approved>

Send back for Revisions

On Hold

Declined

Application moves to On Hold



School	People	Courses	Reports	Forms	Financial	Messages	Discussions	Calendar	Settings
	Search								
	Conflicted								
	Applicant								
	Awaiting Approval								
	In Progress								
	Approved								
	Declined								
	On Hold								
	Course Registration								
	Awaiting Enrollment								
	In Progress								
	Archived								
	Archived								
	Guest								
	2022-2023								

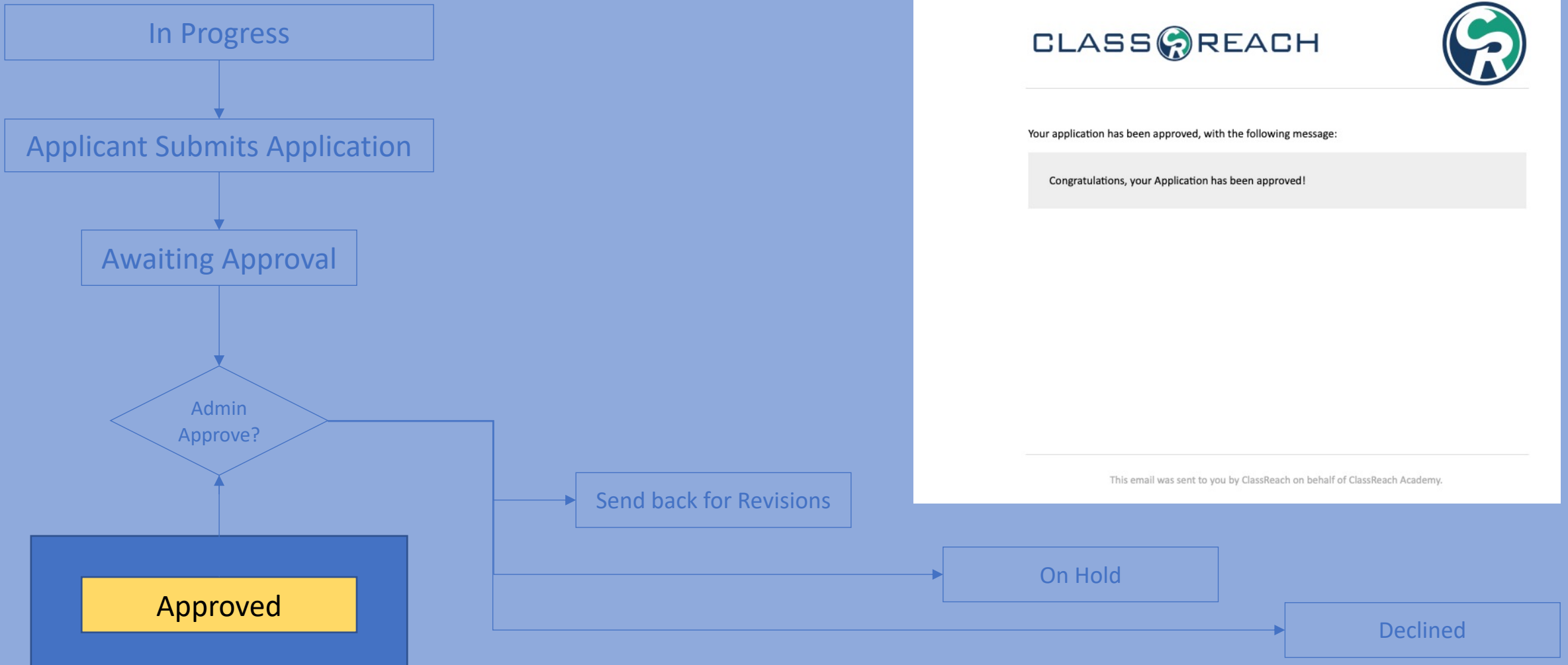
<input type="checkbox"/>		Bunny	T Bunny	Amy Bunny
<input type="checkbox"/>		C	TJ Bunny	
<input type="checkbox"/>		Coyote	Sue C	Jax C
<input type="checkbox"/>		Este	Wylie Coyote	
<input type="checkbox"/>		Support	Guuh Este	
<input type="checkbox"/>		Terry	ClassReach Support	Julie Support
<input type="checkbox"/>		Washington	Sarah Terry	Harry Terry
<input type="checkbox"/>		Becky Lopez	Sarah Terry	
<input checked="" type="checkbox"/>		Washington	George Washington	Patsy Custis
<input type="checkbox"/>			Martha Washington	Jack Custis

Send back for Revisions

On Hold

Declined

Applicant Sent Approval Email



Editing the Application

The screenshot displays the CLASS REACH interface for editing a Family Application Form. The main window is titled "Family Application Form" and contains a sidebar with a "General" tab selected. Under "General", the "Address" field is highlighted with a green box. A red arrow points from this box to a larger, detailed view of the "Address" field in the "Family Info Form" window. This detailed view shows fields for "Address Line 1", "Address Line 2", "City", "ST", "Zip", and a checkbox for "Is International Address?".

Linked Field

The Inquiry Form

- Used to begin the process and request an application
- A Guest Form that can be sent to anyone or posted on the website
- A mechanism to manage admissions workflow

An Admissions Workflow

- To manage all the steps and not miss anything
 1. Inquiry Form
 2. Application
 3. Enrollment Form

Admissions Workflow

Step 1

Inquiry Form

- Send Application
- Reference Letters
- Interview scheduling
- Interview notes
- Assessment of students
- Application Fee Paid
- Headmaster Approval

Admissions Step 1 - Inquiry Form
Action

Form
Settings
Responses

Form Settings
Confirmations
Admins
Workflow
Payments

A workflow allows you to process form responses in a timely and organized manner.

You can create a series of steps and add people to approve the response at each step of the process.

The last step of a workflow cannot be deleted. To delete the last visible step, you will first have to add a new step. To remove all steps, click the button below to disable the entire workflow.

Submitted

+

Admin Acknowledge Interest Form Submitted

+

Family Auto-Sent the Application Link

+

Admin Acknowledge Application Submitted

+

Family Auto Sent the Pastoral Reference link

+

Admin Acknowledge Pastoral Reference Steps Completed

+

Family Auto Sent the Interview Scheduling Link

+

Headmaster Acknowledgement Interview Steps Completed

+

Family Auto Sent the Assessment Scheduling Link

+

Admin Acknowledge Assessment Steps completed

+

Finance Acknowledge Application Fee is Paid
(Delete)

+

Admin Acknowledge All Application Steps Completed

+

Headmaster Approve/Decline Application

Admissions Workflow

Step 2

Application Forms

Admissions Step 1 - Inquiry Form Action Preview

Form Settings Responses

Form Settings Confirmations Admins Workflow Payments

A workflow allows you to process form responses in a timely and organized manner.

You can create a series of steps and add people to approve the response at each step of the process.

The last step of a workflow cannot be deleted. To delete the last visible step, you will first have to add a new step. To remove all steps, click the button below to disable the entire workflow.

The diagram shows a horizontal line with a circle at the start labeled "Submitted". Below the line are two rows of steps, each with a plus icon to its left and a circle to its right. The steps are:

- Admin Acknowledge Interest Form Submitted
- Family Auto-Sent the Application Link
- Admin Acknowledge Application Submitted
- Family Auto Sent the Pastoral Reference link
- Admin Acknowledge Pastoral Reference Steps Completed
- Family Auto Sent the Interview Scheduling Link
- Headmaster Acknowledgement Interview Steps Completed
- Family Auto Sent the Assessment Scheduling Link
- Admin Acknowledge Assessment Steps completed
- Finance Acknowledge Application Fee is Paid (Delete)
- Admin Acknowledge All Application Steps Completed
- Headmaster Approve/Decline Application

Admissions Workflow

Step 3

Enrollment Form

- Gather more data
 - Contacts
 - Medical
 - Tuition Payment options
- Enrollment Fee
- Enroll in classes
- Financial Agreement completed, signed, published

Admissions Step 3 - Enrollment Form ▼ Action

Form Settings | Settings | Responses

Form Settings | Confirmations | Admins | Workflow | Payments

A workflow allows you to process form responses in a timely and organized manner.

You can create a series of steps and add people to approve the response at each step of the process.

The last step of a workflow cannot be deleted. To delete the last visible step, you will first have to add a new step. To remove all steps, click the button to disable the entire workflow.

```
graph LR; S1((Submitted)) --- S2((Finance Acknowledge Enrollment Fee Paid)); S2 --- S3((Admin Acknowledge Students enrolled in classes)); S3 --- S4((Finance Acknowledge Financial Agreement Published)); S4 --- S5((Approved));
```

Q & A

