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## Introduction

This document describes key steps for successfully setting up Sentral Enrolment module for current and alumni student enrolments. This module is useful for all Independent schools/colleges setup on Cloud Enterprise to record student, household, staff and roll class data. Enrolments data becomes your data layer source and populates all Sentral modules. It integrates with the Admissions and Fees & Billings modules and captures relevant data to assess current enrolments.

A detailed description for the setup of Enrolment has been provided as well as a **checklist** of tasks that need to be reviewed on a periodic basis.

## Considerations, Dependencies and Pre-Requisites

This section highlights the key areas that the school administration staff need to consider prior to setting up the Sentral Enrolments.

### 3.1 Data Migration vs Manual data entry

There are 3 ways to populate data into enrolments.

- Manual Data entry – Schools can be taught how to enter student, household, staff and roll class data directly into the Enrolments module. Handy if you did not have a previous database software or you are a small school.
- Import a populated CSV file - schools that have used other third part SAS or SIS systems can populate Sentral's formatted CSV file. There is a requirement by the school to prefill this CSV as Sentral do not extract form other third parties. Handy if you have historical data or a large school whereby manual entry would be too arduous.
- Sync Data from other system and Import CSV – for efficiency, some schools wish to sync to their current database (Sentral only do this for a handful of other systems) so they can start the process of Module rollout. At the same time, the CSV (as per the step above) is populated with data and a cutover date is nominated to Go Live with Sentral enrolments. Handy if data migration is not urgent nor Rollout of Fees & Billings.

### 3.2 Enrolments module (mandatory)

For the Enrolments module to operate, you must have administration access as a user.

Schools can opt to implement only Enrolments module or implement both Enrolments & Admission module. You must decide on one prior to implementation of this module. Here are the considerations;

1. **Use Admissions & Enrolments –**
  - a. Keep future and current enrolments quite separate.
  - b. Project future enrolment placements and statuses-at-a-glance
  - c. Works well for schools who require a formalised application process & waitlist.
  - d. Data collection here can be basic and grow over time
2. **Use Enrolments only -**
  - a. Admissions become pending enrolments within Enrolments module.
  - b. Pending enrolments are not presented in Enrolment dashboard.
  - c. Works well for schools who have a less formal approach and do not have waitlists.
  - d. Data collection here is very detailed as if the child was enrolled.

### 3.3 Roles and Responsibilities Setup

The Enrolments module is a powerful module with many features and functions that can address the school's enrolment stages. Administration of this module is usually assigned to a select group of staff with access to all the functionality in the module. As such, the school will be responsible for applying access levels for staff which will determine what actions they can perform in the module.

## Setup Enrolments

The following is a description of the setup for each area required to capture relevant enrolment data. These details will guide you through the essential configurations you need to setup in Enrolments. Settings that are not explained in this guide can be configured later. The configurations can be found via **Enrolments module > Setup Enrolments**.

### 4.1 General

#### 4.1.1 School Setting (mandatory)

This allows the school to decide on what fundamental settings will be needed. Not all fields require assessment now however there are those that do need attention prior to Go live.

- School name
- Student & Staff Code Generator- decide how student & Staff id codes will be generated
- Use Admissions module – refer to point 3.2 ABOVE.

#### 4.1.2 Academic Periods (mandatory)

Academic Periods are essential to establishing the academic school year and defines the student enrolment dates. Use the default setting to ensure that the New academic period can sync data and pick up new records and active students.

#### 4.1.3 Additional Fields

Staff can add extra data collection fields for students, staff and households. Staff should create categories first for easier management and then fields for those categories. These appear on the individual overview page > additional fields.

Examples: staff notes, specialist report, has staff affiliation, WWCC

Schools can select if this is a global setting that applies to all campuses and set as a flag.

#### 4.1.4 Year Levels (mandatory)

Schools Year are essential to define both for the current year group for students as well as the year group they progress too.

#### 4.1.5 Enrolment Statuses (mandatory)

Define all Enrolments statuses (stages) according to your school processes. Sentral supplies already built-in statuses or you can create new categories & enrolments statuses. A decision needs to be made if any of these are shown in Admissions.

#### 4.1.6 Departure Reasons (mandatory)

Current students do leave schools for various reasons. This area enables you capture that detail according to the criteria the school wish to collect data for.

#### 4.1.7 Documents

Storage and upload of document that are generic not student specific.

#### 4.1.8 Houses (optional)

Schools can nominate to add School houses to enable the house points module or be able to accurately report student numbers or communicate to various houses.

#### 4.1.9 Medical Condition Types

Staff can add a series of known medical condition types that can then be applied to students. Once create, go to a student summary overview > Medical Data > Has Medical Condition > switch to yes> select from the drop down one of the conditions that was created in the setup area.

#### 4.1.10 Flags (optional)

Flags are a common way to identify a student or groups of students according to certain criteria. Flags are coloured alerts to identify students with medical issues, permission to photograph and so on. Flags can be displayed in various modules as alerts for staff. The options are to Show in Sentral, Fees and Global (all schools in your enterprise).

#### 4.1.11 Consent Types

Students often must be given consent to grant permissions. Staff can add consent types and display as a flag in Sentral. Automatic flag assignment will cause the following flag to be automatically assigned to a student when a relevant consent is provided. When consent is changed the existing flag will be removed and a new one will be applied, if relevant. When consent is deleted the flags will be deleted. This does not differentiate between flags added automatically by consent changes and manually, for example:  
Add flag "TEST FLAG" to student manually, then configure a consent that has YES flag set to "TEST FLAG", then provide NO consent for that student, this will cause the manually added "TEST FLAG" to be removed.

Add Consent Type
✕

Type

Details

Show As Flag in Sentral

*Deprecated. Please use the below options to tie this consent to flag assignment*

**Automatic flag assignment**

---

*Selecting the below options will cause the following flag to be automatically assigned to a student when a relevant consent is provided. When consent is changed the existing flag will be removed and a new one will be applied, if relevant. When consent is deleted the flags will be deleted. This does not differentiate between flags added automatically by consent changes and manually, for example:*

*Add flag "TEST FLAG" to student manually, then configure a consent that has YES flag set to "TEST FLAG", then provide NO consent for that student, this will cause the manually added "TEST FLAG" to be removed.*

Auto assigned flag on YES consent:

None
▼

Auto assigned flag on NO consent:

None
▼

Automatically update flag for existing consent

Save

Cancel

#### 4.1.12 Notes Types

Staff can add note types although there are *builtin* types provided by default.

Once note types have been added. On the student screen in additional fields, if Note Type is toggled Yes, the note type can then be added.

#### 4.1.13 Special Needs Programs

Enables staff to create a list of known programs that can be applied to the student's enrolment. A builtin list across all enterprise will display however schools can add.

#### 4.1.14 State Student Number (Victoria only)

This setting is to sync with VCAA with all new enrolments, update of student details, cancellation of enrolment and student exit.

#### 4.1.15 Year Level Placement (optional)

For schools that require a level of accuracy of student numbers per year groups, this setting enables you to define the number of placements.

#### 4.1.16 Specialties

Applies to staff and enables the school to identify skills for staff.

#### 4.1.17 Roles

Define additional roles to staff, parents, or students within the People module.

#### 4.1.18 Abilities

Add additional information for student abilities eg Swim levels or certification. Staff can tick “Yes” to abilities in the Additional fields section of a student’s summary page to add.

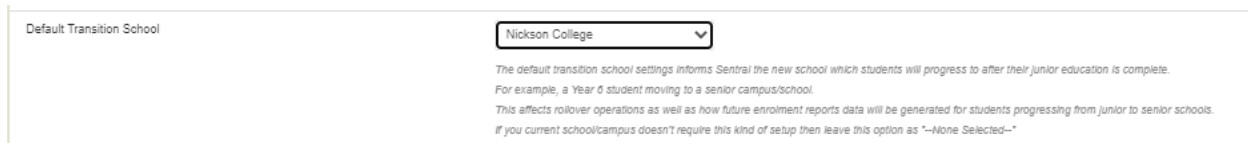
### 4.2 Rollover (mandatory)

At the start of a new school year, schools need to migrate existing students to a new academic period and allocate student to new year groups. This rollover process only gets performed once a year to move students into new year groups, remove exiting students and add new students to academic periods.

However, many of our schools start the process of transitioning students, staff, year, households and roll class for the new year before the current year ends.

1. Schools can setup default transitions (for schools with multiple tenants)
2. Setup and order year level progressions (per tenant)
3. Configure per student special transition situation (exiting or repeating)
4. Ensure students are assigned to correct year levels

#### 1. Default Transition – go to **Enrolment Setup > School Settings > Default Transition School**



Default Transition School

The default transition school settings informs Sentral the new school which students will progress to after their junior education is complete. For example, a Year 6 student moving to a senior campus/school. This affects rollover operations as well as how future enrolment reports data will be generated for students progressing from junior to senior schools. If you current school/campus doesn't require this kind of setup then leave this option as "--None Selected--"

- a. This setting informs Sentral of the new school which student can progress to after junior school is complete. This affects Rollover operations as well as how future enrolments reports data will be generated for students progressing from junior to senior campuses. If you do not require this, leave the setting as none selected.

#### 2. Year level Progression – Go to **Enrolments Setup > Year Levels**

School Years					<a href="#">Add School Year</a>
School Year	Code	School Year Progressing To	Census Year	Actions	
≡ 11	11	12 ▾	Year 11 ▾	<a href="#">Edit</a>	<a href="#">Delete</a>
≡ 10	10	11 ▾	- ▾	<a href="#">Edit</a>	<a href="#">Delete</a>
≡ 9	9	10 ▾	Year 9 ▾	<a href="#">Edit</a>	<a href="#">Delete</a>
≡ 8	8	- ▾	Year 8 ▾	<a href="#">Edit</a>	<a href="#">Delete</a>
≡ 7	7	8 ▾	Year 7 ▾	<a href="#">Edit</a>	<a href="#">Delete</a>

- a. Mandatory Fields and required by Sentral to know which year levels progressions. The ordering is helpful to ensure easy management of year levels data.
3. **Student Transition (optional)** - This is normally done during the year as the school understands that a student will need to repeat or accelerate and want to record it down without having to wait till the end of the year to start on the enrolment's rollover.

**NOTE:** This is not a mandatory step for Enrolment's rollover. You can complete the same set of actions during the rollover process.

Go to Student Enrolment (ie run a student search) and select Repeat/Transfer Student.

Zachary Biddell (Enrolled - Active) ⋮

← Process Student Departure
⇄ Repeat/Transfer Student
More ▾

---

Student Code: STU\_2\_CHIS\_STU000145

- a. This is required when a student at the end of the year will be repeating, moving a particular year level or moving to another school or campus.

### Transfer/Repeat Student

This functionality can be used if the student is not following the standard school year progression at your school. This may be because they are being accelerated to a new year level, are repeating an earlier year level or are transitioning to a new campus. It will take effect when you perform the end of year rollover to create student records for the next academic period.

[Hide Progression Scenarios](#)

Scenario 1: The student is remaining at their current campus next year, but will repeat their current year level.

- Select current school from Target School dropdown
- Select the student's current year level from the Target Year Level dropdown
- Save

Scenario 2: The student is remaining at their current campus this year, but will be enrolled in a year level outside your standard year level progression.

- Select current school from Target School dropdown
- Select the year level the student should be enrolled in next year from the Target Year Level dropdown
- Save

Scenario 3: The student is moving to a different campus.

- Select the school the student will be attending next year from the Target School dropdown
- Select the year level in which the student should be enrolled at their new campus from the Target Year Level dropdown
- Save

Target School

Target Year Level

**WARNING:** If you do not select a specific year level when moving the student to a new campus, the student will be placed in the first available year level in their new campus.

**NOTE:** You do not need to use this functionality if the student is following your standard year level progression, or is transitioning to a your default transition campus because they have completed all available year levels at your school. Standard progression will be handled automatically by the Rollover Task.

### Progression Forecast

Year Level	School	Academic Period
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 3px;">Save</div> <div style="border: 1px solid #0070c0; padding: 5px 15px; border-radius: 3px;">Cancel</div> </div>		

- b. Review the scenarios presented to accelerate, repeat or transfer a student in preparation for end of year Rollover.

The Rollover enables the school/campuses to commence the bulk transitioning of students into year groups and classes for 2021.

**Step 1:** Create the Academic Period/Years (Ensure these are correct reference previous academic periods of unsure prior to set up).

Go to **Enrolments Setup > Rollover**



Confirm the academic year which is ending and the new one that is commencing.

Select Academic Period Review Year Level Allocation Customise Student Allocation Roll Class Allocation Final Review

---

**End Of Year Preparation**

The End of Year process will migrate existing students to the academic period selected below. Confirm the academic year which is ending and the new one that is commencing.

Current Academic Period: 2020 ( 01/01/2020 to 31/12/2020 )

New Academic Period: 2021 ( 01/01/2021 to 31/12/2021 )

[Continue](#)

**Step 2:** Review Year Level Allocation – Review the summary display which shows the different transition actions to be undertaken by the rollover process and how many students are involved in each of the transition actions.

You can also click the Recalculate Student Transitions button to recalculate the counts in case you have made changes in Enrolments for the students. Please note that clicking this button will reset the allocations saved in the next step of this process.

[Recalculate Student Transitions](#)

This page shows how many students will be transitioning to a new year level and what year level they are transitioning to. In this information looks incorrect please review your year levels here and make sure School Year Progressing To is set correctly. The following transitions are currently setup to promote students:

Current Year Level		New Year Level	Students Transitioning
12	→	Exiting	66
	→	Exiting	3
11	→	Exiting	1
11	→	12	79

**Step 3:** Customise Student Allocation – select a Year level to view first and then specify if that student is not continuing or is repeating.

Select Academic Period Review Year Level Allocation Customise Student Allocation Roll Class Allocation Final Review

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**Customise Student Allocations** Select Year Level To View Students [Select](#)

Surname	First Name	Allocation
Simpson	Dwight	<a href="#">Not Continuing</a>
McKay	Jamison	<a href="#">Not Continuing</a>

Each Progression option has an explanation so users can understand what they are doing.

Customise Student Allocations (Year Level) Select Year Level To View Students [Select](#)

Before you commence rollover, ensure your year level progression has been set correctly under the Year Levels menu. If required for your school, ensure that the Default Transition School is set under the School Settings menu.

As part of the rollover process, you will be presented with the following options:

- Promote Normally** - This will move the student to the next available year level as defined by the "School Year Progressing To" settings under the Year Levels menu. "Normal" year level progression may be customised to suit your school's needs and should handle the majority of your students.
- Repeat Year Level** - This will create a record for the student in your next academic period, while keeping the student in their current year level. Used for students who are "repeating" their current year.
- Not Continuing** - This will not create a record for the student in your next academic period, and the student's departure will be processed. Used if the student is leaving your school and not transferring to another school available in your system.
- Promote to Alternate School & Year Level** - This will allow you to customise the progress of the student. The student may be transferred to a different school within your system, and/or moved to a year level that differs from your normal progression settings. Students may skip forward year levels or be placed in earlier year levels using this option.
- Skip** - The system has detected that the student has a future enrolment record for the next academic period. As a result, no new enrolment record is to be created.

[Show Less](#)

Ensure that you save your allocations via the Save Allocations button at the bottom of the page before changing year level selection or navigating away from the allocations page.

## Rollover Report

Data will display ID, first name and surname, student code, status, past year and future year level.

Rollover Report							
Academic Period		2019					
School Name		Caulfield					
Current Year Level		7					
Future Year Level		7 8					
Status: Choose a value... Promote Normally Repeat Year Level Not Continuing Promote To Alternate Year Level Skip							
#	First Name	Family Name	Student Code	Status	Past Year Level	Future Year Level	
1	Bill	Alexopoulos	85216	Skip	7	8	
2	Hayden	MacPhee	85837	Skip	7	8	
3	Cameron	Hawkins	86528	Skip	7	8	
4	Mia	Kirkham	86548	Skip	7	8	
5	Millicent	Pyman	86870	Skip	7	8	

## Post Rollover

Rollover only creates new enrolments records in the new year for students. The Sentral system requires an internal Rollover to occur which is performed in January. Until this happens, do NOT perform importing of 2021 data into Sentral e.g. timetable data.

You can create the new year's roll classes in Enrolments after the rollover in order to place the students in their new 2021 roll classes.

Review the Rollover report and just cross check any student that has been skipped during this process.

### NOTE:

The Rollover will ignore students without a current year level assigned or if they already have a future enrolment record.

Enrolment's rollover will not provide ability to set roll classes. Assigning students to roll classes will need to be completed outside of the enrolment's rollover process.

### NOTE:

Students who are deemed as leavers via the rollover process will have an end date applied to their current enrolment record and the alumni status applied. The student will be active in datalayer until the leaving/end date is greater than the current date.

## 4.3 Data

This data screen displays duplicated student contact relationships enabling schools to ratify and clean any duplications.

### 4.3.1 Student Contact Relationships

A new Student Contact Relationships export that can be accessed via Enrolments Exports, which will export data around students and all their linked contacts and relationship to said contacts. The export contains records for active students.

Fields include;

- School Code - the school code of the school where export is generated
- School Name - the name of the school where export is generated
- Enrolment Status - the most current enrolment status of the student

- Year Level - the year level related to the most current enrolment status of the student
- Roll Class - the roll class related to the most current enrolment status of the student
- Academic Year - the academic period related to the most current enrolment status of the student
- Enrolment Date - the enrolment date of the student
- Start Date - the start date of the most current status of the student
- Exit Date - the end date of the most current status of the student
- Contact Mobile Number - the mobile number of the contact with relationship to the student
- Contact Email - the email address of the contact with relationship to the student
- Contact Priority - the priority number of the contact with relationship to the student
- Contact Receives Absences - Y/N for this permission of the contact with relationship to the student
- Contact Authorised Pickup - Y/N for this permission of the contact with relationship to the student
- Contact Emergency Contact - Y/N for this permission of the contact with relationship to the student
- Contact Primary Contact - Y/N for this permission of the contact with relationship to the student
- Contact Lives With - Y/N for this permission of the contact with relationship to the student
- Contact Receives Reports - Y/N for this permission of the contact with relationship to the student
- Contact Receives Correspondence - Y/N for this permission of the contact with relationship to the student
- Contact Receives Portal Access - Y/N for this permission of the contact with relationship to the student

## Appendix A: Summary Checklist

So, you've scanned the detailed document and are wondering what's next? This table gives you a road map in concise, easy to read steps of how to get your Admissions module up and running in no time.

<b>MODULE</b>	<b>CHECKLIST</b>	<b>REVIEW FREQUENCY</b>
<i>School Settings</i>	<ul style="list-style-type: none"> <li>• Are you using Admissions module?</li> <li>• Add School Name</li> <li>• Set student &amp; staff generation code</li> <li>• Do you need to include alumni in your selections?</li> </ul>	Once
<i>Academic Periods</i>	<ul style="list-style-type: none"> <li>• Have you set up your academic periods?</li> </ul>	Ongoing
<i>Year Levels</i>	<ul style="list-style-type: none"> <li>• Have your setup year levels and rollover year groups?</li> </ul>	Once
<i>Enrolment Statuses</i>	<ul style="list-style-type: none"> <li>• Have you aligned categories and enrolments status according to current school policies?</li> <li>• Are the categories and statuses sequential?</li> <li>• DO you show/hide these in Admissions?</li> </ul>	Ongoing
<i>Departure Reasons</i>	<ul style="list-style-type: none"> <li>• Have you captured the reason for student depart?</li> </ul>	Once
<i>Houses</i>	<ul style="list-style-type: none"> <li>• Have you added Houses?</li> </ul>	Ongoing
<i>Flags</i>	<ul style="list-style-type: none"> <li>• Have you added coloured alerts to flag student/s throughout Sentral?</li> </ul>	Ongoing
<i>State Student Number</i>	<ul style="list-style-type: none"> <li>• VIC ONLY- enables a sync with VCAA</li> </ul>	once
<i>Year Level Placement</i>	<ul style="list-style-type: none"> <li>• Have you set your placement numbers for each year group?</li> </ul>	ongoing
<i>Rollover</i>	<ul style="list-style-type: none"> <li>• Have you completed the rollover steps to move students to new year groups?</li> </ul>	Once - Start of ever year
<i>Review</i>	<ul style="list-style-type: none"> <li>• Assess the configuration and adjust accordingly</li> </ul>	ongoing