OA_APPLCATION & ENROLLMENT
# Table of Contents

Viewing & Filtering Applicants ............................................................................................................... 4
  Where to Find New Applicants ........................................................................................................... 5
  Viewing your Applicant Pool .............................................................................................................. 9
  Save Filter Settings ............................................................................................................................ 12
  Adding Columns to the Roster & Sorting Columns ............................................................................. 14
  Bulk Editing via the Roster .................................................................................................................. 17
  Filtering and Bulk Editing Custom Fields ............................................................................................ 19

Tagging Applicants ................................................................................................................................. 22
  Tagging Applicants via Roster ............................................................................................................. 23
  Tagging Applicants via Applicant Profile ........................................................................................... 26
  Automatically Tagging Applicants ...................................................................................................... 28

Reviewing & Completing Forms ............................................................................................................. 31
  Adding a New Inquiry or Applicant ..................................................................................................... 32
  Reviewing an Application .................................................................................................................... 33
  Editing an Application ........................................................................................................................ 38
  Exporting Forms to PDF ...................................................................................................................... 40
  What to do when 'Email has already been taken' .............................................................................. 41

Statuses & Re-Applying .......................................................................................................................... 43
  Changing an Applicant's Status and Sending Automated Notifications ........................................... 44
  Editing Status History ........................................................................................................................ 47
  Editing Statuses and Creating Sub-Statuses ....................................................................................... 54
  Applicants Re-Applying for a Different Academic Year .................................................................... 56

Tasks & Notes ........................................................................................................................................ 58
  Adding & Editing a Task....................................................................................................................... 59
  Viewing Tasks ..................................................................................................................................... 65
  Adding and responding to an internal note ......................................................................................... 68

Removing Duplicates & Linking Families ............................................................................................... 72
  Merging Applicants ............................................................................................................................ 73
  Linking Siblings ................................................................................................................................. 76

Additional Resources ............................................................................................................................ 79
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Digest</td>
<td>80</td>
</tr>
<tr>
<td>Viewing your Applicant Dashboard</td>
<td>83</td>
</tr>
<tr>
<td>Assigning Student and Parent ID Numbers</td>
<td>85</td>
</tr>
<tr>
<td>Activating Parent Accounts</td>
<td>88</td>
</tr>
<tr>
<td>Editing &amp; Re-Sending Recommendation Requests</td>
<td>91</td>
</tr>
<tr>
<td>Audit Log</td>
<td>94</td>
</tr>
</tbody>
</table>
Viewing & Filtering Applicants
Where to Find New Applicants

There are three main ways to find new applicants:

1. Daily Digest
2. Latest Activity
3. Applicants Roster

Daily Digest

The Daily Digest is an email that any admin user can receive on a daily basis. It includes information on the Inquiries, Applicants, and Admitted Students from the previous 24 hours, as well as on other activities in the system such as submitted forms and documents, interviews scheduled, etc.

Configuring Daily Digest Settings

Navigate to Settings > School Settings > Academic Information to choose what time of day the Daily Digest is sent. Click Save Changes.
Each admin user can subscribe to the Daily Digest, or it can be enabled for them, via Settings > Staff Directory and click on the name of that user.

Scroll down to the Notifications section and check the box for Send Daily Digest Email & Scheduled Export. Click Save Changes.
**Latest Activity**

At the bottom of the Admin Dashboard, under the Latest Activity, you will see a summary of the most recent activity in OpenApply. This will indicate:

- New applicants, who have recently applied
- Changes in Admissions Status (e.g. Students who are admitted)
- Notes from Interviews or Internal Notes between Admissions Staff
- Updates to Applicant Profiles (e.g. Family updating their address, transcript uploads)

All activity is shown by default, with the most recent activities at the top.

Click the Filter dropdown to view specific types of activity (e.g. Student Message, Comment, Status Change).

---

**Applicants Roster**

Click on Inquiries or Applicants on the left panel. The applicants are displayed with key information in columns.

1. Click the three dots icon to customise which columns are shown
2. Choose to show the Application Date (and/ or Enquiry Date) column and click Save to display this column
3. Click the small arrow icon on the Application Date column to sort by Application Date. Click again to show the most recent applicants first
<table>
<thead>
<tr>
<th>Programme</th>
<th>Student Name</th>
<th>Year Group</th>
<th>Status</th>
<th>Application Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>Ada Junior</td>
<td>Kindergarten</td>
<td>Applied</td>
<td>Jul 24, 2018</td>
</tr>
<tr>
<td>Secondary</td>
<td>Adele Esposito</td>
<td>Grade 9</td>
<td>Applied</td>
<td>Sep 24, 2017</td>
</tr>
<tr>
<td>Middle</td>
<td>Tobino Marchesi</td>
<td>Grade 7</td>
<td>Admitted</td>
<td>Sep 22, 2017</td>
</tr>
<tr>
<td>Primary</td>
<td>Django Reinhardt</td>
<td>Grade 1</td>
<td>Admitted</td>
<td>Sep 21, 2017</td>
</tr>
<tr>
<td>Middle</td>
<td>Elina Natesdottir</td>
<td>Grade 7</td>
<td>Declined</td>
<td>Sep 19, 2017</td>
</tr>
<tr>
<td>Primary</td>
<td>Bonnie Butler</td>
<td>Grade 1</td>
<td>Wait-listed</td>
<td>Sep 17, 2017</td>
</tr>
<tr>
<td>Middle</td>
<td>Kelly Rozhal</td>
<td>Grade 7</td>
<td>Applied</td>
<td>Sep 16, 2017</td>
</tr>
<tr>
<td>Primary</td>
<td>Samuel Eppelbaum</td>
<td>Kindergarten</td>
<td>Applied</td>
<td>Sep 15, 2017</td>
</tr>
</tbody>
</table>
Click on Inquiries, Applicants, Students, or Alumni on the lefthand navigation panel. This tutorial will use Applicants as the example, but the filter and export options are same for all four categories.

The applicants are displayed with key information in columns. Select applicants to perform bulk actions, for example adding tags or sending checklist reminders.

Click Filter to further refine your selections. Your filter selections can be saved for future use, so for example if you regularly review Primary applicants for the 2017-2018 academic year, you can save those filter preferences.

Please click [here](#) for more detailed instructions.

The saved filters appear on the lefthand menu.
Once your pool has been selected, you can select all or select individually

**Rearranging Columns**

Easily rearrange information on the screen by clicking Arrange Columns. Drag and drop the fields to alter how information is displayed.

For example, display the Student Name in the lefthand column, followed by Grade, Programme, and Applicant Date.
<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td></td>
</tr>
<tr>
<td>Student Name</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Enrollment year</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Inquiry Date</td>
<td></td>
</tr>
<tr>
<td>Application Date</td>
<td></td>
</tr>
<tr>
<td>Enrollment Date</td>
<td></td>
</tr>
<tr>
<td>Withdrawal Date</td>
<td></td>
</tr>
<tr>
<td>Graduation Date</td>
<td></td>
</tr>
<tr>
<td>Last Update</td>
<td></td>
</tr>
<tr>
<td>Tags</td>
<td></td>
</tr>
</tbody>
</table>

[Buttons: Cancel or Save]
Save Filter Settings

Select Your Tab

Please begin by selecting which category tab on the left hand side of the dashboard you wish to filter by. For this example we will use Applicants, but saving the filter is the same for the different types of categories on your dashboard. From the chosen tab, select the Filter button on the top right to create your filter.

Filtering Results

After selecting the Filter button, choose the applicable fields from the list in order to filter for the desired data. Once completed, select Save Filter Settings to save your current filter.
Filter Name and Save Filter

From the **Save Filter Settings** button, the dropdown box provides the option to enter a *filter name*. After labeling the filter, select **Save**.

New Saved Filter

Once your filter is saved, it will appear on the left hand side under the *Alumni* tab. All saved filters will populate here for easy access.
Adding Columns to the Roster & Sorting Columns

Adding Columns to the Roster

Navigate to one of the rosters on the left hand side: Enquiries, Applicants, Students, Families, or Alumni.

Click the three dot icon near the top right of the roster.

On the dropdown menu, tick the checkbox next to the columns you want to add. If needed, you can drag the individual column upward or downward to change the order of the columns on the roster. Then click Save when you are done.
As a note, if you add columns to any one of the Enquiries, Applicants, Students, or Alumni rosters, the other three rosters will be updated as well. You will need to do this separately with the Families roster.

**Sorting Columns**

When you click a **Column Header**, the data in the column will be sorted alphabetically, numerically or chronologically depending on the type of data. If you click the **Column Header** for a second time, the data will be sorted in reverse order.
<table>
<thead>
<tr>
<th>Grade</th>
<th>Name</th>
<th>Status</th>
<th>Year</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Behzad Adham</td>
<td>Applied</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>10</td>
<td>Faria Alkama</td>
<td>Applied</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>3</td>
<td>Shrin Asmnani</td>
<td>Admitted</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>11</td>
<td>Paraskeoula Antoniou</td>
<td>Declined</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>11</td>
<td>Rosalind Arvaddat</td>
<td>Admitted</td>
<td>2016</td>
<td>Female</td>
</tr>
<tr>
<td>8</td>
<td>Laura Artemis</td>
<td>Applied</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td></td>
<td>Lucille Audreto</td>
<td>Applied</td>
<td>2016</td>
<td>Female</td>
</tr>
<tr>
<td>6</td>
<td>Sarah Austin</td>
<td>Waitlisted</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>12</td>
<td>Júlia Abenedo Barros</td>
<td>Applied</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td>2</td>
<td>Neeramma Ashaasundaram</td>
<td>Waitlisted</td>
<td>2016</td>
<td>Female</td>
</tr>
<tr>
<td></td>
<td>Asha Bibebrude</td>
<td>Applied</td>
<td>2017</td>
<td>Female</td>
</tr>
<tr>
<td></td>
<td>Jane Banks</td>
<td>Admitted</td>
<td>2017</td>
<td>Female</td>
</tr>
</tbody>
</table>
Bulk Editing via the Roster

Information can be edited in bulk via the Enquiries, Applicants, Students, and Alumni Rosters, found in the left hand navigation bar. Fields that can be updated include Grade, Status, Enrolment Year, Gender, Student ID, and default and custom fields that are multiple choice, dropdown menu, or checkbox type.

To begin updating, navigate to the desired roster, Filter for the students you would like to update, and click Edit.

Next change the desired fields and click Save. Be sure to save each page that you edit before moving to the next page.
<table>
<thead>
<tr>
<th>Student Name</th>
<th>Year Group</th>
<th>Student ID</th>
<th>Nationality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berki Admann</td>
<td>Grade 6</td>
<td>279</td>
<td>Hungarian</td>
</tr>
<tr>
<td>Faina Alexeeva</td>
<td>Kindergarten</td>
<td>371</td>
<td>Russian</td>
</tr>
<tr>
<td>Shrin Amarnani</td>
<td>Grade 1, Grade 2</td>
<td>220</td>
<td>Indian</td>
</tr>
<tr>
<td>Paraskovula Antoniou</td>
<td>Grade 3, Grade 4</td>
<td>398</td>
<td>Greek</td>
</tr>
</tbody>
</table>
Filtering and Bulk Editing Custom Fields

In OpenApply you can filter by standard options, such as grade, status, gender, etc. as well as filter for custom fields. This allows filtering for any multiple choice, checkbox or dropdown menu field, on any form.

Navigate to the Applicants, Enquiries, Students, or Alumni Roster on the left side navigation panel. Click Filter.

Click Add a new custom Field. Select a Form which contains the field, and then select the Field to filter for. Click Save.

Click within the field to select specific responses to filter for. It is possible to select more than one response, for example, filtering for all American or British applicants in the Nationality field. Click Add a new custom Field again to filter by more than one custom field.

Click Filter Results to view the applicants that meet the filter criteria.
Alternatively, leave the option box empty, then click **Filter Results** to view all responses to the selected custom field on the roster.

This can also be used with **Save Filter Settings** to save this filter for future use.
Bulk Editing a Custom Field

Follow the steps above to display the custom field that you wish to edit. Leave the option box empty to view all responses to the field on the roster or filter for specific responses. Click the blue Edit button to edit the field, and click Save when you are finished.
Tagging Applicants
Tagging Applicants via Roster

Click Applicants, Enquiries or Students on the left side navigation panel to go to the Roster. Select the applicants to be tagged and click Tag.

Type the tag name in the Add Tag field and, if there are multiple tags to be added, enter all of the tag names and separate them with commas. The colour of the tag is grey by default; click on the grey square to change the tag colour. OpenApply will suggest the names of tags that already exist in the system. Click Save to add the tags to selected applicants.
Display Tags on the Roster

Click on the three dots button near the top right of the Applicants, Enquiries or Students roster and check the box for Tags. Click Save. The Tags column will then be displayed on the roster.

Filter Applicants by Tags on the Roster

Click Filter near the top right of the Applicants, Enquiries or Students roster.
Select the **Tags** to filter by and click **Filter Results**. All applicants with any of the **Tags** you selected will be displayed.
Tagging Applicants via Applicant Profile

Tag an Applicant Individually via Applicant Profile

Applicants can be tagged individually via their Applicant Profile.

To add a new tag, first navigate to the Applicant Profile and click on the Tags icon, near the top right. Select Add New Tag from the dropdown menu.

Type the tag name in the Add New Tag field. To add multiple tags at the same time, type all of the tag names at the same time, and separate them with commas. The colour of tags are grey by default; click on the grey square to choose another colour for the tag. OpenApply will suggest the names of tags that already exist in the system. Click + to add the new tag.

Editing and Deleting Tags via Applicant Profile

To edit or delete existing tags from an applicant, click on the Tags icon near the top right of Applicant Profile. Select Edit & Delete Tags from the dropdown menu.
All of the existing tags for that applicant will be listed, and the tag name or the colour of the tag can be edited if necessary. If the colour of the tag is edited, then that will change the colour of the tag for all applicants with that tag. Click on the Trash icon to delete the tag. Click to Save any changes.
Automatically Tagging Applicants

Tag Rules

Applicants can be tagged automatically based on the values that applicants select for certain fields on forms.

These are known as Tag Rules. To create or edit Tag Rules, navigate to Settings > Forms and click Tags.
Select a form to show all fields within the form. Select a field to display all values available for that field.

Click to type the tag that you would like to be assigned to any applicants that select that field value, and to choose the colour for that tag.
Scroll down, click **Update Tag Rule** to save the rules you have created.

All tag rules will be visible. Click the pencil icon to edit the tag rule for that field, or the trash icon to delete the rule.

Newly created tag rules will not apply to previous entries, but clicking **Regenerate tags** will apply the rule to all existing applicants.
Reviewing & Completing Forms
Adding a New Inquiry or Applicant

Adding a New Inquiry

To add a new inquiry, click on the Inquiries tab on the lefthand panel.

Complete the information you have about the applicant. As an administrator on the system, you do not have to complete all required fields.

This feature was intended primarily for schools to track inquiries over the phone or allow them to assist parents who cannot fill out the online form directly.

Once the applicant and his/her parents are added to the system, you can send welcome e-mails directly to the parents, prompting them to complete the application.

Adding a New Inquiry via the Dashboard

To add a new inquiry via the Dashboard, navigate to the QuickStart section and click Add New Inquiry.
Reviewing an Application

Search for a Student

Search for a student via the search bar at the top of the screen. Or click on any student name on your Dashboard to review their information.

Student Profile

By clicking on a student name, you can review their full profile, which organizes all of their application information:

- **Status**: The applicant’s current status (e.g. Applied, Accepted, Wait-listed)
- **Tags**: Adds a label to an applicant, which can later be used as a search filter (e.g. Assessed, EAL, Visited)
- **Completed forms**: Shown below the applicant name and includes the main application form.

Underneath the application form information, you can choose to assign tasks connected to the student, review the student’s admissions checklist, leave notes for the family or your colleagues, review and upload files, and schedule tour dates & interviews.
Tasks

Click Add New Task to add a new task for yourself or a colleague.

Describe the task, assign it, indicate the type, due date, and attach any reference files. Your colleague will receive an e-mail notification.

Once the task is added, you can also add comments by clicking on the speech bubble.

Checklist

View the student's progress towards completing the applicant checklist. Add individual checklist items or send an automated reminder.
Notes

Add a note for the parent or an internal note for you and your colleagues. By default, notes are internal.

You can choose to notify your colleague on an internal note, so they receive the message in real-time. If your colleague does not have an account on OpenApply, you can send your note directly to an outside e-mail address.

Files

View all files associated with the student, including those that the applicant has submitted as part of required forms (e.g. School Report, Health Records).

Individually or bulk download the files for further review, or directly upload additional files.
You can also directly edit the name by hovering over the file.

**Tours**

Schedule a tour for the applicant here. The family will automatically be notified via e-mail.

![Tours Schedule](image)

**Interview**

Schedule a tour for the applicant here. The family will automatically be notified via e-mail.
Additional Information

The student profile also includes additional information about:

- Siblings & parents
- Applicant history
- Payment information
- SSAT exam scores (the integration must be enabled first)
- Re-enrollment information (for currently Enrolled students only)
Editing an Application

Editing Application Information

Navigate to a student profile and click on the Edit icon to begin.

From here, you can also select Access & Permissions for the student and family.

- **Locked**: Parents cannot edit any information.
- **Unlocked**: Parents can edit forms and family information.
- **Archived**: This archives the applicant as-is. Most commonly used for applicants who completed an inquiry but failed to continue communicating with the admissions office.
- **Archived as Graduated**: This is available to Enrolled students only.
- **Archived as Withdrawn**: This is available to Enrolled students only.

Editing Parent and Guardian Information

To edit Parent & Guardian information, navigate to the student’s profile and click on the Edit icon in the Parent & Guardian section.
You can edit basic information here, and also link or de-link parents to the child.
Exporting Forms to PDF

Exporting to PDF

To export an application form to PDF, click on the Vertical Dot icon next to the applicant's name.

You can choose to export all forms or specific forms.

To export the forms and exclude fields that were not completed, navigate to your Settings > General and set your PDF options. (Online vs Print versions.)

The Print version will print a complete copy of your application form(s) so that a parent may complete it by hand.
What to do when 'Email has already been taken'

Schools sometimes receive the message 'Email has already been taken' when updating a parent's email in the Applicant Profile. This is due to the email address already existing for another parent. In OpenApply, each parent must have a unique email address.

Below are the likely scenarios and how to resolve them.

1. If you know the email is used by someone else, the other parent of the student for example, then you should find out the correct contact information for the new parent.

2. If you are not aware that another parent has this email, navigate to the Families Roster and search the email.
If the email is used by a different parent, we recommend contacting the parents, finding out their correct email address and updating it for the existing parent if needed.

If the email is used by the same parent, i.e. there is a duplicate, you will need to link the siblings and merge the duplicate parents. You can find instructions here.

3. If you cannot find the parent email on the Families Roster, click on the Orphaned Parents button.

Search for the email address to see if there is an Orphaned Parent with the same email. If so, tick the box to the right of the Orphaned Parent and click Delete.

After you have resolved any issues with the duplicate email, you will be able to update the Applicant Profile without receiving an error.
Statues & Re-Applying
Changing an Applicant's Status and Sending Automated Notifications

Via the Applicant Profile

You can easily update the Applicant status (e.g. Applied to Admitted) by changing the levels from the dropdown menu. You can only choose from valid statuses that come next in the status sequence. For example, if you would like to change an applicant who is Applied to Enrolled, you must first change them from Applied to Admitted, then Admitted to Enrolled. To see a list of all valid sequences, click here.

Only certain Administrators have the ability to admit and enrol students. This permission level can be assigned via the Settings > Staff Directory tab.

Next select an effective date for the status by updating Effective On. The Effective On date determines when the status change will become effective in your analytics. The Effective On date defaults to today's date, or the date of the current status, if that is in the future.
Sending Your Status Change Notifications

If you have automatic status notifications enabled for the new status, the box to send this notification will be ticked by default. You can untick the box if you do not wish to send the automatic status notification. You can select a date under Notification On for the notification to be sent. If you choose a future notification date, then the Status History on the parent account will not be updated until that date.

You can set the automated email via Settings > Admissions > Status & Notification and click on the status to edit the status message.

If your admissions deadlines are fixed, you can choose to send admissions notifications in bulk after your deadline date has passed.
Undoing a Status Change

If a status is changed in error, or if a decision has been changed, it is possible to undo the most recent status change, to roll the status of the applicant back to the previous status. Scroll down to the Applicant History, and click Undo on the right panel of the applicant profile. In the example below, this would put the student back to Admitted, from Enrolled.
Editing Status History

Identifying Applicants with a Broken Status History

On the Inquiries, Applicants, Students, and Alumni Rosters, applicants with an invalid status history can easily be identified by an orange warning triangle next to the applicant's name. Click on the applicant to view their Applicant Profile and resolve this.

The warning is also shown on the Applicant Profile under the current status. Click Fix it to bring up the Status Editor.
You can also click the pencil icon next to Applicant History to bring up the Status Editor. If a recent status change was made in error, you can simply click Undo to roll back to the previous status.

**Editing the history to resolve issues or to add previous statuses**

When viewing the Applicant History Status Editor for an applicant, any invalid status changes will be highlighted by an orange warning triangle. If you hover over the warning triangle, the system will notify you why this status history was invalid. In this case, the applicant has the Applied status twice in a row, so the error message shows "Applied cannot follow Applied".
In this example, we can resolve the broken history by clicking the trash can to delete the additional Applied status.

**Re-Ordering Statuses**

Other invalid status histories can be resolved by editing the **Effective On** date, if status changes are in the wrong order.
In the following example Admitted is before Applied. This can be resolved by setting the Effective On date for Admitted to be after the Effective On date for Applied.

**Changing the Enrolment Year of a Status**

Other invalid status histories can be resolved by changing the Enrolment Year, if for example an applicant applied, was declined, and then applied again.
In the following example, the applicant was Pending then Declined for 2015-16, then successfully applied again for the subsequent year. This can be resolved by changing the Enrolment Year for the second Pending status and for the Applied status to 2016-2017 Academic Year.

Adding Previous Statuses

Previous or missing statuses can be inserted if necessary using the Add button.

In the following example, this can be used to add an Admitted status in between Applied and Enrolled.
This can also be used to add information for previous enrolment years.

**Valid status histories**

For reference, the following status histories are valid:
OpenApply has several statuses built-in to organize the movement of an applicant through the entire admissions process. The names of these statuses can be edited to fit your admissions process via Settings > Admissions > Status & Notification.

To edit a status name, click on the desired status (e.g. Applied) and update the text in the 'Name' field. In this example, we changed Applied to Registered. Once completed, click Save Changes at the bottom of the page.
Creating a Sub-Status

To create a sub-status, click + Add Status Level next to the respective status. In this example, we will add a status level to Wait-Listed.

After clicking + Add Status Level, a box will drop-down for you to enter the Name of sub-status and Responsible Party. Type the desired name of your sub-status in the text box titled Name of sub-status and specify the Responsible Party. Note: the Responsible Party indicates whether the decision for the status was made by the school or by the family.
Applicants Re-Applying for a Different Academic Year

If an applicant was declined for, or withdrawn from, an academic year, they may wish to re-apply for a subsequent academic year.

If their status is still showing as Applied (or another status), you should first ensure that they are marked as Declined or Withdrawn. In this case, the applicant was Declined for 2016-2017 Academic Year, but now wishes to re-apply. First, click the pencil icon to edit the applicant.
Edit the **Enrollment Year** to the new academic year for which the applicant is now re-applying. In this case, the applicant is now applying for 2017-18. If you would like the family to be able to edit the forms that they have already submitted, so that they can update their application, select **Unlocked** on the right panel, under Access & Permissions. Otherwise, be sure that **Locked** is selected. Click to **Save Changes**.

You can now change the status from Declined (or Withdrawn) to Pending. From Pending, you can then change the status to Applied if necessary. The applicant history will correctly reflect the fact that the applicant applied for one year, was declined, has now re-applied, and this will also be reflected in any analytics.

More information on the applicant history can be found at [Editing Status History](#)
Tasks & Notes
Adding & Editing a Task

In OpenApply, you can add a Task for yourself or a colleague via the Admin Dashboard or Applicant Profile. This allows you to keep track of open items across the team and ensure that nothing is falling through the cracks.

Adding a Task via the Admin Dashboard

Navigate to Dashboard > Tasks and click Add New Task.

![Tasks](image)

Add a name for your task and select the related student.
Select an assignee under Assign to and choose a Due Date. Tick the Notify via Email checkbox to send a notification to the assignee both when the task is created and on the due date.

Tasks are categorised by Type. To edit existing types or add a new type, click Edit Task Types. Finally, you can add a Note or Attach a File. Click Save Task when done.
Editing a Task via the Admin Dashboard

Reassign a task by clicking the assignee name and selecting a new name from the dropdown. Click on the name of the task to make further edits.

On the task editing page, you can change the assignee under Assigned to, select a new Due Date or click on the trash icon on the top right side to delete the task.

By clicking on the pencil icon near the top right, you will be able to edit further information:
1. Edit the Task Name
2. Change the Type
3. Edit any Task Type
4. Add or edit a Note
5. Attach a File

Add a Task via the Applicant Profile

Navigate to the Applicant Profile, and click Add New Task under the Tasks tab.

Add a name under Task, select the assignee and choose a due date.

Tick the Notify via Email checkbox if you’d like the assignee to receive a notification when the task is created and on the due date.
You can also edit **Task Types**, select a **Type**, add a **Note** and **Attach a File**. When you are done, click **Save Task**.

**Edit a Task via the Applicant Profile**

Click the name of a task to edit.

On the task editing page, you can change the assignee under **Assigned to**, select a new **Due Date** or click the **trash icon** to delete the task.
Click on the pencil icon near the top right side, to edit further information:

1. Edit the Task Name
2. Change the Type
3. Edit all Task Types
4. Add or edit a Note
5. Attach a File
Viewing Tasks

You can view tasks for all students on the Admin Dashboard or for individual students on the Applicant Profile.

Viewing Tasks via the Admin Dashboard

You can see all the incomplete tasks directly on the Admin Dashboard, displayed chronologically by due date. Tasks that do not have due dates will appear last.

Tick the checkbox to the left of the task to mark it as complete. To view completed tasks, click +View Completed To Do’s+.

To see tasks assigned to a certain person only, click the dropdown menu on the top right side and select the name.
Click the **speaking bubble** to view the comments on a task. The number in the bubble indicates the number of comments.
Viewing Tasks via the Applicant Profile

Navigate to the Applicant Profile to view tasks for the individual applicant under the Tasks tab.

Tick the checkbox to the left of the task to mark it as complete. To see all the completed tasks, click +View Completed To Do's+.

Click the speaking bubble to view all the comments on a task. The number in the bubble indicates the number of comments.
Adding and responding to an internal note

Add an Internal Note

In OpenApply, you can add an Internal Note to the Applicant Profile for internal communications, to keep track of verbal communication, or to reference information in the future.

Navigate to the Applicant Profile and click on the Notes tab. If you want to notify colleagues of the note by email, select their name(s) from the dropdown menu under Cc:. If you don't select a name, then the note will be recorded on the account, but no one will be notified by email.

Enter your text in the box. If needed, click Attach File to attach an internal file to this note. Please make sure the radio button for Mark this as an internal note is selected and then click Add Note.
View Internal Notes

Under **Latest Activity**, select **Comment** from the dropdown menu next to **Filter**. All notes will display below including both internal and external ones.
Responding to Internal Notes

Hover your mouse over the note and you will be able to see three icons under the timestamp. Click on the Arrow icon to reply.

Select if you would like to Cc: a colleague, add your text, and click Reply to send your response.
Removing Duplicates & Linking Families
Merging Applicants

If the same applicant exists twice in your system, the applicants can be merged, so that their activities, notes, and files can be combined, and the data from their applications can be merged into a single application form. Duplicate applicants can occur if a parent submits two applications for the same child using different email addresses. First, navigate to the applicant profile that you would like to be merged. In this example, we will navigate to the profile for Samuel with the 'Pending' status, so that we can merge him into the applicant with the 'Applied' status.

Click the pencil icon to edit the applicant
Click **Merge Applicant**

Search for, and select, the applicant you would like to merge them into, then click **Merge**
Select the data you would like to keep for each field, from each applicant

When you have completed selecting the data, scroll to the bottom, click **Merge** and the applicants will be merged.

The parents may also exist twice in the system; advice on how to merge duplicate parents can be found [here](#).
Linking Siblings

If applicants on your system have the same parents but are not displayed as Siblings, the family information can be edited to reflect this relationship. In this example, Chloe, Rachel, and Henry are siblings, but only Rachel and Henry have parent information listed.

To begin, first navigate to the applicant's Profile. Please do this for the applicant with the incorrect parent information, in this case, Chloe.

Under Parents & Guardians on the right, please click the Edit icon.

Next, click Link Parents.
If the Applicant Has No Parents

You can link an applicant to existing parents by clicking the + Link Parent button. Search for the correct parents, and click the Add button. Applicants that share the same parents are treated as siblings. So, Chloe, Rachel, and Henry will now all appear linked as siblings.

If the Applicant Has Duplicate Parents

If the applicant's parents are duplicates in the system, then click the Merge icon.
Select the correct parent to merge to, and click the **Merge Contacts** button.

Choose which information you would like to keep and click the **Merge** button. Now, Chloe's parents will be the same as Henry's and Rachel's.
Additional Resources
The Daily Digest is an email that any staff user can sign up to receive on a daily basis. It includes information on the previous day's Inquiries, Applicants, and Admitted Students, as well as on other activities in the system such as submitted forms and documents, interviews scheduled, etc.
Configuring Daily Digest Settings

Via Settings, School Settings, Academic Information you can choose what time of day the Daily Digest is sent. Once you are done, click Save Changes.
Each staff user can sign up for the Daily Digest email via Settings, Staff Directory and clicking on their name. Scroll down to the Notifications section and tick the Send Daily Digest Email & Scheduled Export Checkbox. Once you have made your selection, click Save Changes.
Viewing your Applicant Dashboard

Dashboard

After logging in, you will be directed to the Dashboard.

The Dashboard shows key metrics of the admissions season, including inquiries, applications, and latest activity. From here, you can navigate to individual students, analytics, re-enrolment, or payment information.

Your admissions calendar is also visible on the right, displaying tours, open days, and interviews.

Tasks

Assign tasks directly on the Dashboard for your admissions team. View completed and pending tasks to ensure followup is happening smoothly across the team.

Quick Start

From the Dashboard, you can also directly add a new Inquiry, schedule a Tour, or RSVP for an Open Day. This is an easy and fast way to take down information from walk-in prospects or families that call on the phone.
Latest Activity

Under the Latest Activity, you will see a summary of Admissions activity. This feed will indicate:

- New applicants, who have recently applied
- Changes in Admissions Status (e.g. Students who are admitted)
- Notes from Interviews or Internal Notes between Admissions Staff
- Updates to Applicant Profiles (e.g. Family updating their address, Transcript upload)

We show all information by default, but have included a Filter dropdown that allows administrators to view specific types of information or changes on their account (e.g. Student Message, Comment, Status Change).

This information is also e-mailed every 24 hours to users who have the Daily Digest enabled.
Assigning Student and Parent ID Numbers

In OpenApply, students have two types of ID number, an Applicant ID and Student ID, which are found on the top right corner of the Applicant Profile.

**Applicant ID** is assigned automatically by OpenApply to all applicants, and cannot be changed.

**Student ID** is entered manually by admin, and can be used to help match students to their IDs from your Student Information System, for example.

**Parent ID** numbers can also be manually assigned to each parent, and are found by clicking on the parent's name on the right panel of the Applicant Profile.

Manually Assigning a Student ID Number

To manually assign a Student ID number, navigate to the Applicant Profile. Click on the Key icon on the top right corner to edit the Student ID number. Then click the Save button.
Manually Assigning a Parent ID Number

To manually assign a Parent ID number navigate to the Applicant Profile. Click on the Pencil icon to edit the parent information.

You can edit the Parent ID in the Parent ID field. When you are done click the Save Changes button.
Activating Parent Accounts

Click on the **Families** tab on the left panel. Under the **Families** tab, Parents are displayed with key information in columns. Select parents to perform bulk actions, for example **Activate Parent Accounts**, **Enable Notifications** or **Re-send Welcome Emails**. When activating parent accounts, the parents will automatically receive the Applicant & Family Welcome e-mail, allowing them to set their password and log-in for the first time.

Click **Filter** to further refine your selections.

Once your pool has been selected, you can select all or select individually.

**Parent Icons**

Icons next to each parent name indicate whether the parent is has an account, is enabled to receive e-mail notifications or have verified their e-mail address:

1. Key icon - parent has an activated account, and can log into OpenApply
2. Envelope Icon - parent is enabled for e-mail notifications, and will receive e-mails sent through OpenApply
3. Check mark icon - parent has verified their e-mail address, and is able to use LaunchPad Single Sign On
These icons can also be viewed on the right panel of the applicant profile.

Rearranging Columns

Easily rearrange information on the screen by clicking **Arrange Columns**. Drag and drop the fields to alter how information is displayed.

For example, display the Children in the lefthand column, followed by Parent One Name, Parent One Employer, etc.
Orphaned Parents

These are parents on the system whose student accounts were deleted, rendering them “orphans.” We recommend bulk deleting these parent accounts, as they will not be able to complete a new application while their e-mail addresses remain on the system.

If you see a parent that should be linked to a child, navigate to the student profile and Edit the Parent & Guardian information. You’ll be able to link the parent to the student.
Editing & Re-Sending Recommendation Requests

A parent may enter incorrect recipient details for a recommendation request, or a recipient may contact you directly if they are having difficulty completing an OpenApply questionnaire (recommendation / reference). In this case, it can be necessary to edit the recipient details or to re-send the request.

Editing Recipient Details

Navigate to the Applicant Profile. Click the Pencil icon to edit the applicant.

1. On the right panel, click on the name of the questionnaire/recommendation form to edit
2. Check and update the teacher details to whom the request will be sent
3. Ensure Send Email is selected
4. Save Changes
5. Click the applicant's name to exit edit mode and return to the applicant profile
Re-Sending a Recommendation Request

Navigate to the Applicant Profile. Click More, then click on the name of the recommendation form.

If the questionnaire/recommendation request was previously sent to the recipient, you can see who the request was sent to and when it was last sent. Click Send Again to re-send the request.
If the request was not previously sent to the recipient, click **Send Now** to send the request.
Audit Log

General Audit Log

The Audit Log can be accessed via Settings, Audit Log. It provides a comprehensive change-log of the actions taken on your account. You can find information for the time and date the change was made, who made the change, which applicant it applied to, and the content of the change.

Individual Applicant's Audit Log

An Audit Log for each individual applicant is available via the Applicant Profile. This log provides information on changes made for the specific applicant.