

INQUIRY · DOCUMENTS · ENROLLMENT

Walk each new family from inquiry to enrollment

Keep the inquiry, its documents and the next step close at hand.

Admissions is more than gathering an application. The people welcoming a family need to know what has arrived, who is looking after it and where things stand. Defero keeps the inquiry, its stage, the colleague responsible, notes and supporting documents together in one admissions record.

See where each family stands

Look over the admissions list by year and stage. Keep the stage current so the team can see at a glance where attention is needed.

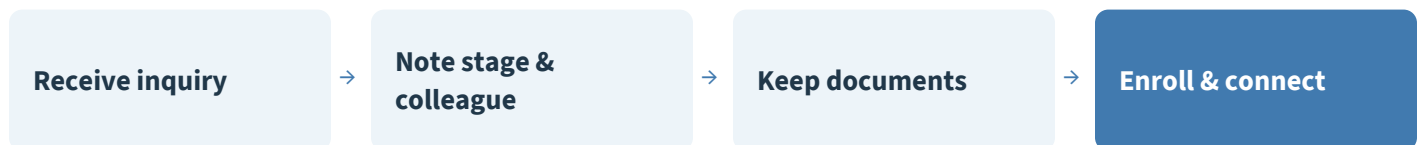
Hand work on with care

Assign a colleague and leave notes alongside the inquiry and documents. Whoever picks it up next finds the whole story in one place.

Let enrollment flow on

When the school says yes, the inquiry becomes a student record, joined to a new or existing household.

How it connects



FICTIONAL EXAMPLE

An inquiry becomes a student record

A fictional family already has a child at the school and inquires for a younger sibling. Admissions staff record the inquiry, attach the application and keep the stage current. When the school approves enrollment in its own way, they choose the existing household, and the new student is joined to the guardians already known.

Begin with one intake: keep its inquiries, stages and colleagues current.

HOW IT WORKS, STEP BY STEP

Keep the path visible

Staff need the Admissions role to work here. The stages follow your school's own way of welcoming families; decisions and follow-up remain with the school.

- 1 Receive the inquiry**

Open Admissions and choose Add inquiry. Enter the child's information and the intended year and grade. Check the list's year and stage filters so you are looking at the right group.
- 2 Note the stage and the colleague**

Open the admissions record. Use Stage to show where things stand and Assign to name the colleague looking after it. Keep both current as the family moves along, so anyone can pick up the thread.
- 3 Keep the documents with the record**

Use the Application, Offer and Contract sections to attach the relevant documents, and add notes for context and next steps. These sections hold your documents; the conversations and signing still happen the school's way.
- 4 Look over before enrolling**

Check the child's details and the school's decision. In Enroll, confirm the grade or classroom and choose New household or Existing household(s). Look carefully at the guardian links before completing enrollment.

A gentle handoff

Fictional example: one colleague receives an application and attaches it to the record. She adds a note about a missing document and assigns the colleague who will follow up. He opens the record and finds the document and note waiting, with no history to piece together from separate inboxes.

PUTTING IT INTO PRACTICE

Give the new student a clean start

A well-kept admissions record leaves the school with connected, dependable information for the child's first day.

Join the right household

Where a family already belongs to the school, choose the existing household or households. Enrollment links the student to the guardians there. Take a moment to confirm, rather than creating a second household because the child is new.

Look over the new student record

After enrollment, check the student's placement, guardian links and contact details. Defero also copies the admissions documents into the student's Files section; make sure the expected files are there and attend to anything missing.

Write down decisions and next steps

Use notes to record decisions and what comes next. Carry out the school's own signing and conversations with the family, then attach the completed documents. That context, beside the stage and the colleague's name, lets the next person pick up the work with confidence.

Before you complete an intake

- ☐ Are the stages and assigned colleagues current?
- ☐ Are the relevant documents and notes attached?
- ☐ Has the school made and recorded its enrollment decision?
- ☐ Have the new student's household links and files been looked over?

A clearer welcome. A better-connected start.

Next: Student and Family Records shows how to tend the relationships and details created at enrollment.