Online Registration Setup

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Overview
Online Registration can be used to allow guardians to verify and update student information, to fill out custom forms, to submit a food service application, make a fee management/food service payment or sign up for childcare.

Online Registration can be setup in two different locations in the software. Regardless of where you access the setup, the screen are the same.

You can setup Online Registration by going to Student Management>Families>Family Access>Online Registration>Setup>Configuration.

You will then select Online Registration Setup.

Within the Online Registration Setup screen, you will click on Edit next to the school year.
The second location you can set up Online Registration is found by going to Student Management>Families>Family Access>Setup>**Configuration**.

You will click on **Entity Configuration**

You will expand Online Registration and click on **Edit** next to the school year.
### Online Registration Configuration

**Start/End Online Registration** – Enter the start and end date for online registration.

**Do Not Display Start and End of Online Registration on the Family Access Calendar** – This option will allow you to remove the Online Registration dates from the calendar in Family Access.

**Rename “Online Registration” in Family Access to** – This option will allow you to change the name of Online Registration as it displays in Family Access.
• **Only Display Online Registration for Students in selected Processing Lists** – Turn on this option to limit access to Online Registration to only students that are included in Processing Lists that can be attached here. Use the Add, Remove, Remove All buttons to update the Processing Lists attached.

![Processing Lists](image1)

After selecting the Add button, you can select an existing Processing List or create a new one, and then with that list highlighted select the Select button to add it. You can then repeat this as needed. As names are updated on the list, they will automatically have their access to Online Registration updated accordingly.

• **Keep Online Registration Open past the End date for Students in Selected Processing Lists** – Turn on this option to allow access to Online Registration outside of the date range entered above for students’ guardians that are included in Processing Lists that can be attached here. Use the Add, Remove, Remove All buttons to update the Processing Lists attached.

![Processing Lists](image2)

After selecting the Add button, you can select an existing Processing List or create a new one, and then with that list highlighted select the Select button to add it. You can then repeat this as needed. As names are updated on the list, they will automatically have their access to Online Registration updated accordingly.

• **Do Not Display Online Registration for Students in specific grade levels** – If this option is selected, Online Registration information will not display for the selected grade levels.
You can select the Grade Level(s) by clicking on the **Select Grade Levels** button. After you select the Grade Level(s), you will click on **Hide**.

- **Allow limited access to Online Registration for Guardians in non-primary Families** – This option will allow families other than the primary family access Online Registration to complete certain items (like verifying addresses and phone number for just their family).
- **Do Not Display Online Registration for Students who are Inactive in Entity ___ and School Year ____** - If this option is selected, only guardians of students who are actively enrolled in the entity for the school year specified will be able to complete Online Registration.
- **Do Not Display Online Registration for Students who were enrolled via NSOE for School Year ____** - If this option is selected, guardians who were student(s) were enrolled via the New Student Online Enrollment for the selected year will not see the Online Registration.
- **Enter a free form message that will display on the Online Registration screen** – The message entered will display after the guardian selects to begin the registration process.
  - **Free Form Message Label** – Enter a heading that will appear above the free form message. If nothing is entered here, the default label of “District Message” will display.
  - **Hide Free Form Message on Navigation Menu** – This will hide the District Message step from appear in the navigation pane that displays on the right of the Online Registration screen for guardians.
  - **Always start on Free Form Message when entering Online Registration** – Select this option to have guardians always enter the Online Registration steps at the District Message even after they have begun the process and have some steps completed. If this option is not selected guardians will return to their first non-completed step when they return to continue Online Registration.
- **Allow Guardians to email questions/concerns while Online Registration is open** – If this option is selected, a hyperlink with display on the Online Registration screen if an email address is entered. The hyperlink that will display states ‘Online Registration Question/Comment?’
- **Email confirmation to all guardians in the Primary Family when Online Registration is completed** – If this option is selected, the guardians of the primary family will receive an email once they mark the registration as complete. This will allow you to customize the body of the email.
- **Email selected staff member when Online Registration is submitted** – If this option is selected, the selected staff member will receive an email each time a guardian submits an Online Registration form.
- **Staff** – Allows you to select the staff member who will receive the emails.
- **Email Body** – Allows you to customize the text that will create the email body, up to 5000 characters, that will be sent to the staff recipient.
Online Registration Steps

- Add a Food Service Application
- Attachment
- Childcare Enrollment
- Custom Form
- Embedded Link
- Link
- Make a Fee Payment
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- Verify Ethnicity/Race
- Verify Skylert Information
- Verify Student Information

Step Completion Buttons can be customized by the district. You can give your users the option to click only the Complete Step # Only button or the Complete Step # and move to Step # buttons, or choose to have Both of those buttons available at the end of every step. If you chose the Complete Step # Only button, users will have to use the button to
mark the step complete and then use the Navigation buttons on the right of the Online Registration screen to move between steps.

**Wall Message** allows you to customize the message that displays on the home screen. You have the options of **Show Default, Hide, or Custom**. If you select **Custom**, another field is enabled, allowing you to enter up to 500 characters of custom text to display to guardians.

The Online Registration Steps can be configured at the bottom of the Online Registration Configuration screen. When configuring a step, you can choose to make the step optional. If a step is flagged as an **Optional Step**, the guardians are not required to complete the step before submitting their Online Registration. You also have the ability to set a range of students to have access to the step based on the selected **Schools** or **Grade Levels**.

As you create steps, if you need to rearrange the order that the steps display for guardians, use the crosshair icon to drag and drop the steps to the appropriate order.

**Add a Food Service Application**

The **Food Service Application** step allows a guardian to submit a Food Service Application through Online Registration.

**Attachment**

The **Attachment** step will allow a guardian to upload an electronic file (a PDF, image, Word document, etc...) for the district to review. This could be used to attach some form of proof of residency, or to complete an optional form that needs a physical signature. The Attachment option can be selected multiple times when configuring Online Registration.

- **Select Attachment Types** – Select the Attachment Type codes that guardians will be able to upload a file for. You will also be able to mark whether an individual type is required or not. The codes are created under Student Management>Student>Student>Setup>Codes>Attachment Types. After you have selected the attachment types, you will click on **Hide**.
Childcare Enrollment

The Childcare Enrollment step will allow guardians to enroll their child in a childcare program that has been set up administratively. This option will only display if your district is using the Fee Management module and has Childcare enabled.

- **Allow Primary Family to select a T-Shirt Size for Child** – This option will allow a guardian to select his/her child’s t-shirt size.

Custom Form

The Custom Form step allows you to select a Custom Form that has been built to be filled out by guardians as part of Online Registration. Custom Forms can be created by going to Student Management>Students>Students>Setup>Configuration>Custom Forms Setup or Student Management>Family>Family>Setup>Configuration>Custom Forms Setup. The Custom Form option can be selected multiple times when configuring Online Registration.

It is a good idea to use the Enter Freeform Message option to give specific directions on how the guardian is supposed to update the attached form. Especially if the form being used is a Multiple form per record (should they add a new copy of the form, or edit an existing copy of it).
• **Allow All Families to update this Custom Form** – Select this option to allow guardians in any of the student’s families to update the information in a Student Custom Form. If this is not selected, only the guardians in the student’s first family will have the ability to update a Student Custom Form. Family Custom Forms specific to the individual Families, so this option does not have an effect on those.

**Embedded Link**

The **Embedded Link** allows the guardian to view a URL within the Family Access Online Registration screen. The Embedded Link option can be selected multiple times when configuring Online Registration.

**Link**

The **Link** step will allow a URL to be added to Online Registration. You can use the Label to enter more information regarding the Link. If you select to use the Link option as a step, the URL will open another screen/tab depending upon the browser. The Link option can be selected multiple times when configuring Online Registration.
Make a Fee Payment

Make a Fee Payment allows guardians to submit a fee payment. Fees must be assigned to the payor and the district must be using Fee Management. In order to see the ‘Make a Fee Payment,’ you must have a 3rd party credit card vendor configured within the Vendor Setup (Product Setup> Skyward Contact Access>Student Management>Configuration).

Make a Food Service Payment

Make a Food Service Payment allows guardians to submit a food service payment. The district must be using the Food Service module and a 3rd party credit card payment vendor must be configured within the Vendor Setup (Product Setup> Skyward Contact Access>Student Management>Configuration).

Verify Ethnicity/Race

Verify Ethnicity/Race allows guardians to verify their child’s ethnicity and race.
- **Preview Letter** – Allows you to view the letter guardians will see prior to verifying the Ethnicity/Race in Online Registration.
- **Edit Letter** – You will select this option if you want to make modifications to the letter displaying in Online Registration.
- **Set Validation to** – This option allows to determine if someone administratively needs to approve the student’s ethnicity/race.

Verify Skylert Information
Verify Skylert Information allows guardians to control which notifications they receive and how they receive them.

Verify Student Information

Verify Student Information allows guardians to review and request changes to their child’s information. You will need to click on Setup Fields to determine the fields guardians will be able to view in Online Registration. Guardians can request changes to Student Information, Family Information, Alert/Emergency Information, Emergency Contact and/or Health Information.
Online Registration in Family Access

Guardians will click on the Online Registration tab and then click on their Child’s Name to complete the Online Registration process within Family Access.

Add a Food Service Application

Guardians can click on the Add a Food Service Application if you select this as a step in the Online Registration process. If you flag the steps as optional, the I have completed this step option will display in black and also mention that it is an optional step.
Attachment

The guardian can select the **Choose File** button to browse for and select the file they want to add to one of the available Attachment Types. If a type was marked as required, it will have an asterisk (*) next to it. A file must be selected for these types before being able to complete the step.
The guardian can click on **Childcare Enrollment** to select the Childcare Program and complete the enrollment screen.
This is the Childcare Program Enrollment screen in which guardians can select the Childcare Program.
Custom Forms

The guardian will be able to update the Custom Form immediately if the form is set up as a Single Form.

If the Custom Form was set up as a Multiple Form per record, the guardians will have to select the Add button to create a new copy of the form for their student, or Edit to update an existing version of the form.
When a guardian clicks on the Embedded Link step, the URL will open within the Online Registration screen.
If a link has been created as a step for Online Registration, the guardian will click on the label name of the URL. The link will then open in a new window/tab depending upon the browser.
Make a Fee Payment

Guardians will click on **Make a Fee Payment**.

The guardian will select the fees to be paid and then click on **Pay with ____**.
Make a Food Service Payment

Guardians can click on **Make a Food Service Payment**.

The guardian will enter the **Payment Amount** and the click on the **Pay with ____** button.
After reading the Ethnicity/Race letter, the guardian will click on the **Continue** button.

The guardian will answer the two questions concerning their child’s Ethnicity/Race.
The guardian can update their contact information and options used with the Skylert/School Messenger system.
Verify Student Information

Guardians will be able to view and update the fields selected within the Online Registration Configuration. They will click on each of the different areas (Student Information, Family Address, Family Information, Emergency Information, Emergency Contacts and/or Health Information) to verify the information.
Complete Online Registration

The final step of the Online Registration process is to **Complete Online Registration**. The guardian will verify that all steps required have been marked as complete. After verifying the steps, the guardian will click on the **Submit Online Registration** button.

After selecting **Close and Finish**, the guardian will receive a message stating that the Online Registration was successfully completed.