RGM- Recruitment Help Guide

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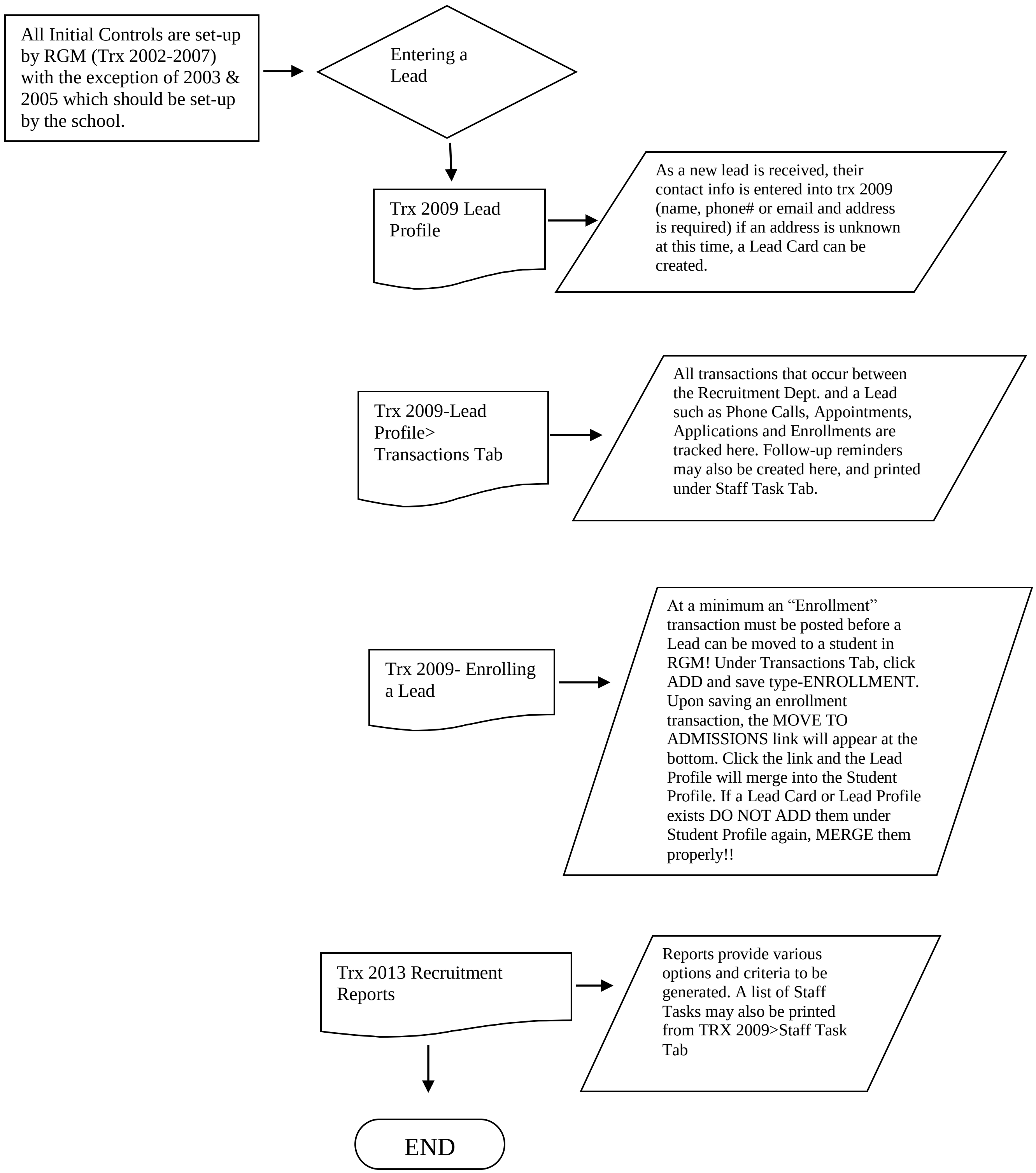
Recruitment Flow Chart



Media Types [2002]

KEY	CODE	MEDIA NAME	ACTIVE RECORD
000001	BB	BILLBOARD/DISPLAY	YES
000002	DM	DIRECT MAIL/FLIERS	YES
000003	EVT	EVENT/FAIR	YES
000004	WEB	INTERNET	YES
000005	NP	NEWSPAPER	YES
000006	PB	PHONE BOOK	YES
000007	PUB	PUBLICATIONS	YES
000008	RAD	RADIO	YES
000009	REF	REFERRAL	YES
000010	TV	TV ADVERTISEMENT	YES

Module Description

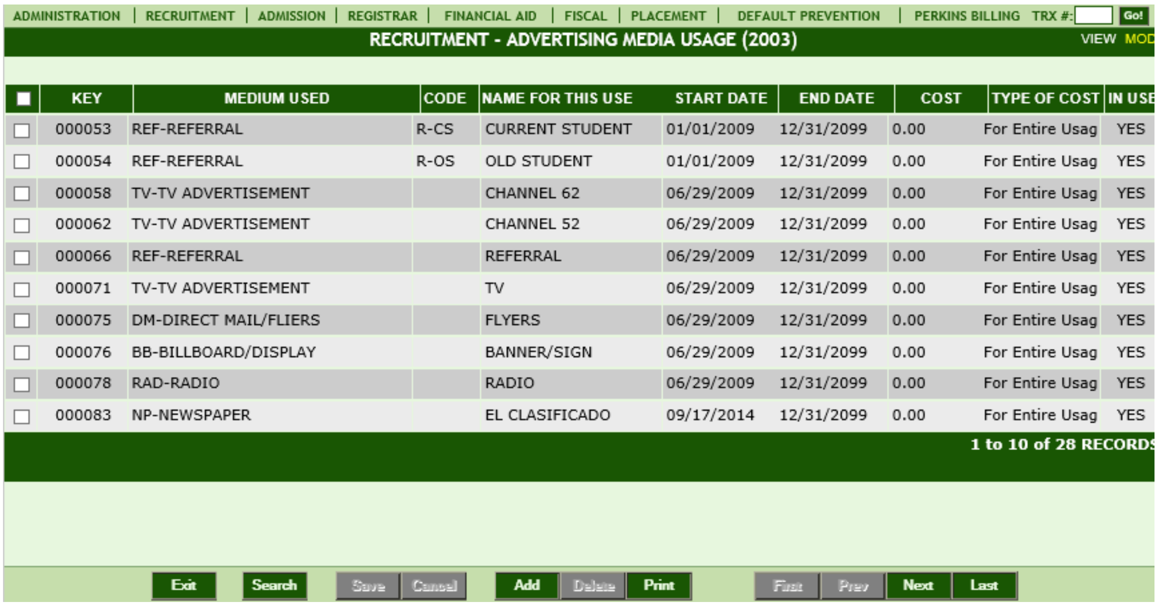
This module enables you to create the global controls that categorize the media types for the Advertising Media Usage. Media Types are the media that initially brought the lead to the school.

Examples: Billboard, Flyers, Internet, Newspaper, Television, Yellow Pages and Walk-Ins.

The data entered can be used to evaluate the effectiveness of advertising campaigns and other recruitment efforts and is available in reports. The Media Type is assigned to a student under the Lead Profile.

Field	**Description**
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Code	An abbreviation used in reports
Media Name	A name for the Media Type.
Active Record	Specifies whether the record is in use or inactive

Advertising Media Usage [2003]



	KEY	MEDIUM USED	CODE	NAME FOR THIS USE	START DATE	END DATE	COST	TYPE OF COST	IN USE
	000053	REF-REFERRAL	R-CS	CURRENT STUDENT	01/01/2009	12/31/2099	0.00	For Entire Usag	YES
	000054	REF-REFERRAL	R-OS	OLD STUDENT	01/01/2009	12/31/2099	0.00	For Entire Usag	YES
	000058	TV-TV ADVERTISEMENT		CHANNEL 62	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000062	TV-TV ADVERTISEMENT		CHANNEL 52	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000066	REF-REFERRAL		REFERRAL	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000071	TV-TV ADVERTISEMENT		TV	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000075	DM-DIRECT MAIL/FLIERS		FLYERS	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000076	BB-BILLBOARD/DISPLAY		BANNER/SIGN	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000078	RAD-RADIO		RADIO	06/29/2009	12/31/2099	0.00	For Entire Usag	YES
	000083	NP-NEWSPAPER		EL CLASIFICADO	09/17/2014	12/31/2099	0.00	For Entire Usag	YES

Module Description

Media is categorized further using the [2003] Advertising Media Usage Control and the following information is recorded: Medium Used, Name for this use, Start Date, End Date, Cost and Type of Cost. Reports can then be generated to show the cost per lead and other valuable statistics.
The Advertising Media Usage is assigned to a student under the Lead Profile.

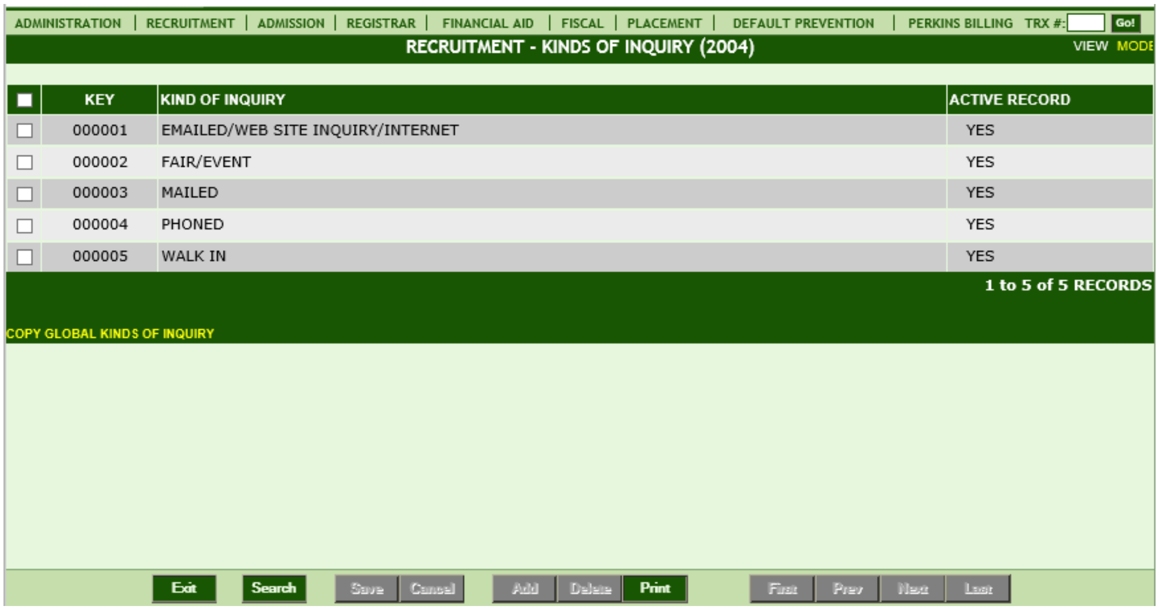
TIP: Choose **For Entire Usage**: use when the charge is for a total cost for a specific duration of time such as Yellow Pages yearly cost. **Per Lead** is used when a school is charged by the lead for a specific cost such as an internet lead.

Note: The system will not allow you to delete a record if it is has been selected and used in a Lead Profile. Instead modify the effective End Date.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Medium Used	Media type that initially brought the lead to the school
Code	An abbreviation used in reports
Name for this Use	A name for a specific Advertising media Usage.
Start Date	Date when Advertising Media Usage will take effect. If you want to **ADD** a new Advertising Media Usage, don't modify the existing one. Add a new one

End Date	Date when Advertising Media Usage will be in effect. If you want to ADD a new Advertising Media Usage, don't modify the existing one. Add a new one
Cost	This is the total cost of the Advertising Media for the date range.
Type of Cost	**For Entire Usage**: use when the charge is for a total cost for a specific duration of time such as Yellow Pages yearly cost. **Per Lead** is used when a school is charged by the lead for a specific cost such as an Internet lead.
In Use	Yes- this Media Type will display under Media dropdown in Lead Profile. No- this Media Type will no longer display in Lead Profile.

Kinds of Inquiry [2004]



Module Description

This module enables you to create the global controls for Inquiry Types. Inquiry Types are used by recruiters to note how the lead contacted the school.

Example: Mail, Telephone, Walk-In, Website, etc.
Kind of Inquiry is assigned to a student under the Lead Profile.
The data entered can be used to evaluate the effectiveness of advertising campaigns and other recruitment efforts and is available in reports.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Kind of Inquiry	A name for the *Kind of Inquiry* which is used by recruiters to note how the lead contacted the school. **Example**: Mail, Telephone, Walk-In, Website, etc.
Active Record	Specifies whether the record is in use or inactive

Kinds of Recruitment Transactions [2005]

ADMINISTRATION | RECRUITMENT | ADMISSION | REGISTRAR | FINANCIAL AID | FISCAL | PLACEMENT | DEFAULT PREVENTION | PERKINS BILLING TRX #: Go!

RECRUITMENT - KINDS OF RECRUITMENT TRANSACTIONS (2005)

VIEW MOD

KEY	TRANSACTION DESCRIPTION	IN USE	REQ	
010001	NEW LEAD	YES	YES	TRANSACTION STATUS
010002	PHONE CALL	YES	NO	TRANSACTION STATUS
010003	EMAIL	YES	NO	TRANSACTION STATUS
010004	POSTAL MAIL	YES	NO	TRANSACTION STATUS
010005	APPOINTMENT	YES	YES	TRANSACTION STATUS
010006	APPLICATION	YES	YES	TRANSACTION STATUS
010007	ENROLLMENT	YES	YES	TRANSACTION STATUS
010008	ORIENTATION	YES	NO	TRANSACTION STATUS
010009	PAYMENT	YES	NO	TRANSACTION STATUS
010010	ISIR REQUEST WITH DRN	YES	NO	TRANSACTION STATUS
010011	OTHER	YES	NO	TRANSACTION STATUS

LAST UPDATE: 12/17/2008 09:48:52 DONNAXX5 — 1 to 11 of 11 RECORDS

Exit | Search | Save | Cancel | Add | Delete | Print | First | Prev | Next | Last

Module Description

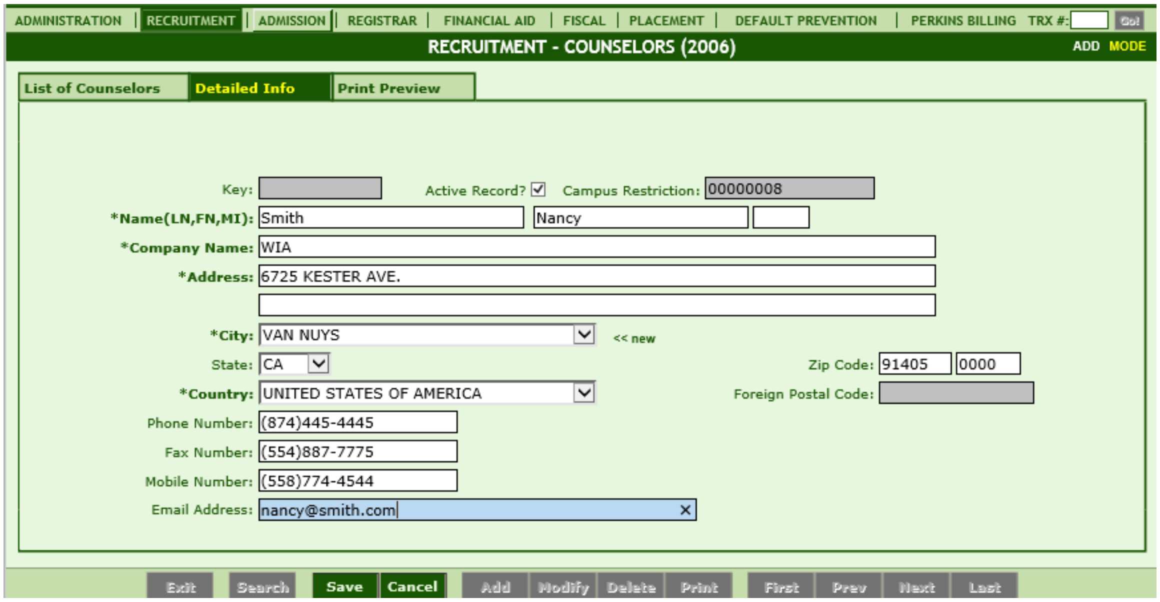
Recruitment Transactions are used to record the efforts or actions used when recruiting and enrolling students. All Transactions are available in an *Efficiency Report* by transaction type as well as other recruitment reports.

NOTE: Modification types: choose whether you want to track a transaction. (In Use = YES). If you do not want to track a particular transaction change In Use to NO. You may also choose whether a transaction will be required. If a transaction is required (Req = YES) then the user must post that transaction before moving a lead to admissions and enrolling. The following three transactions if marked required must be posted in order by the user: Appointment, Application and Enrollment. In other words, the user cannot post an application without first having an appointment posted.

Click **TRANSACITON STATUS** to view the status choices available for each transaction.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus.
Transaction Description	This is a name of the transaction.
In Use	Choose Yes or No to make a transaction available or unavailable in the lead profile.
Req	Choose Yes or No to require a transaction be posted prior to an enrollment.

Counselors [2006]



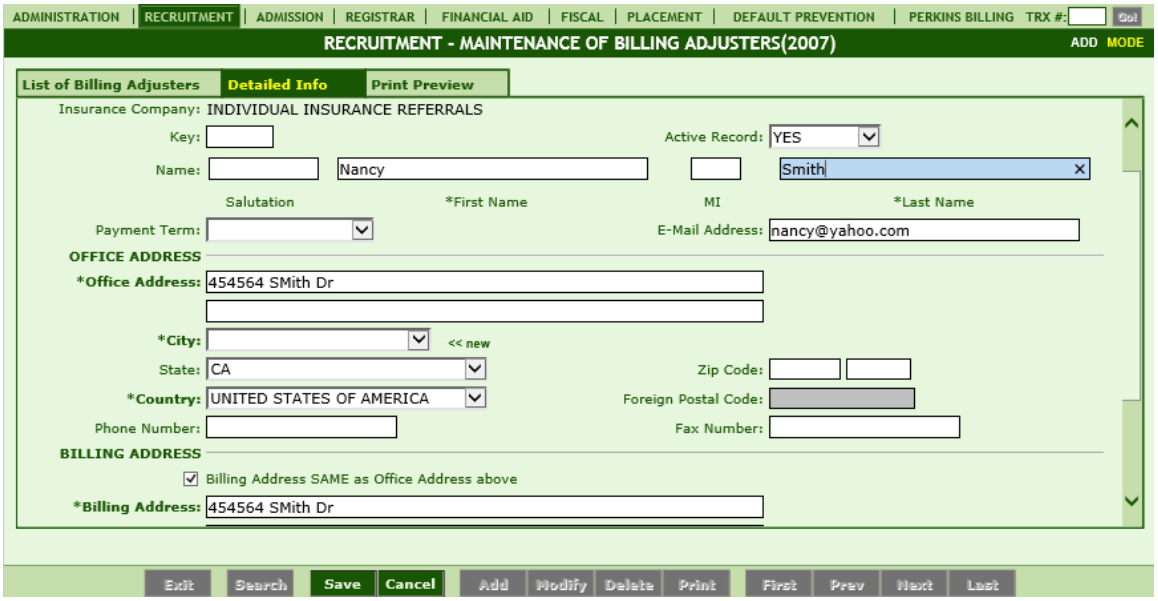
Module Description

Record the Counselors (typically rehab) that work with students in your school in this module. In the Students Profile you will be able to designate which counselors work with a student. Also mail-merge options are available for letters and other documentation and include the details from the Counselors' profiles.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Name (LN,FN, MI)	Name of the counselor (last, first, middle initial)
Company Name	Name of organization the Counselor works for
Address	Counselor's address
City	City
State	State
Zip code	Zip code
Country	Country
Foreign Postal Code	Postal Code of Country if other than United States
Phone Number	Counselor's phone number
Fax Number	Counselor's fax number

Mobile Number	Counselor’s mobile phone number
Email Address	Counselor’s email address

Billing Adjusters [2007]



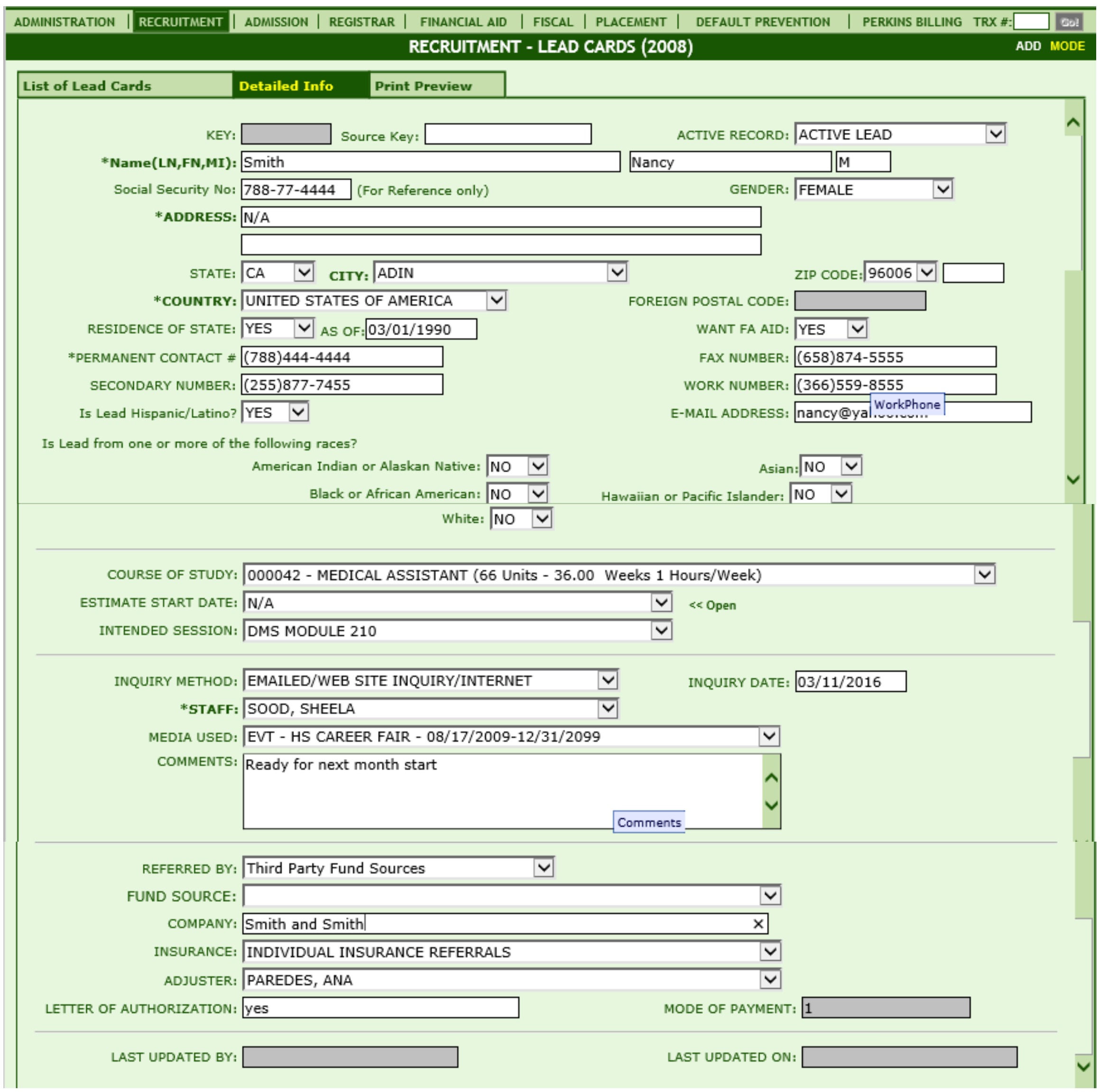
Module Description

Record the Billing Adjusters (Insurance Companies) that work with students in your school in this module. In the Student Profiles you will be able to designate which Billing Adjusters work with a student. Also mail-merge options are available for letters and other documentation and include the details from the Billing Adjusters profile. The options defined in this module are first set-up under Trx 1002 Business Partners with ‘business partner TYPE” as insurance company.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Name	Name of the Insurance Company (salutation, first, middle initial, last)
Payment Term	Refers to the terms of the payments to the school or student on behalf of the student’s school charges
Email address	Insurance Co. email address
Office Address	Insurance Co. address
City	Insurance Co. City
State	Insurance Co. State
Zip code	Insurance Co. Zip code

Country	Insurance Co. Country
Foreign Postal Code	Postal Code of the country if different than United States
Phone Number	Insurance Company phone number
Fax Number	Insurance Company fax number
Billing Address same as office address	Check the box if the office and billing address are the same
Billing Address, City, State, Zip, Country, Foreign postal code, phone numbers	Address and phone number of Insurance Company billing office (if different than above)

Lead Card [2008]

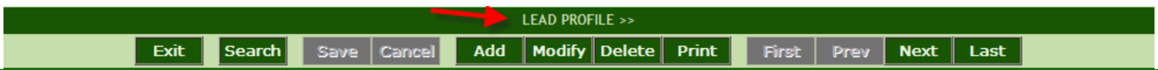


Module Description

The Lead Card allows you to enter an initial lead with as little information as possible. When you access a lead card the page is in ADD MODE and is ready for you to record information about a new lead.

<u>Things To Remember:</u>

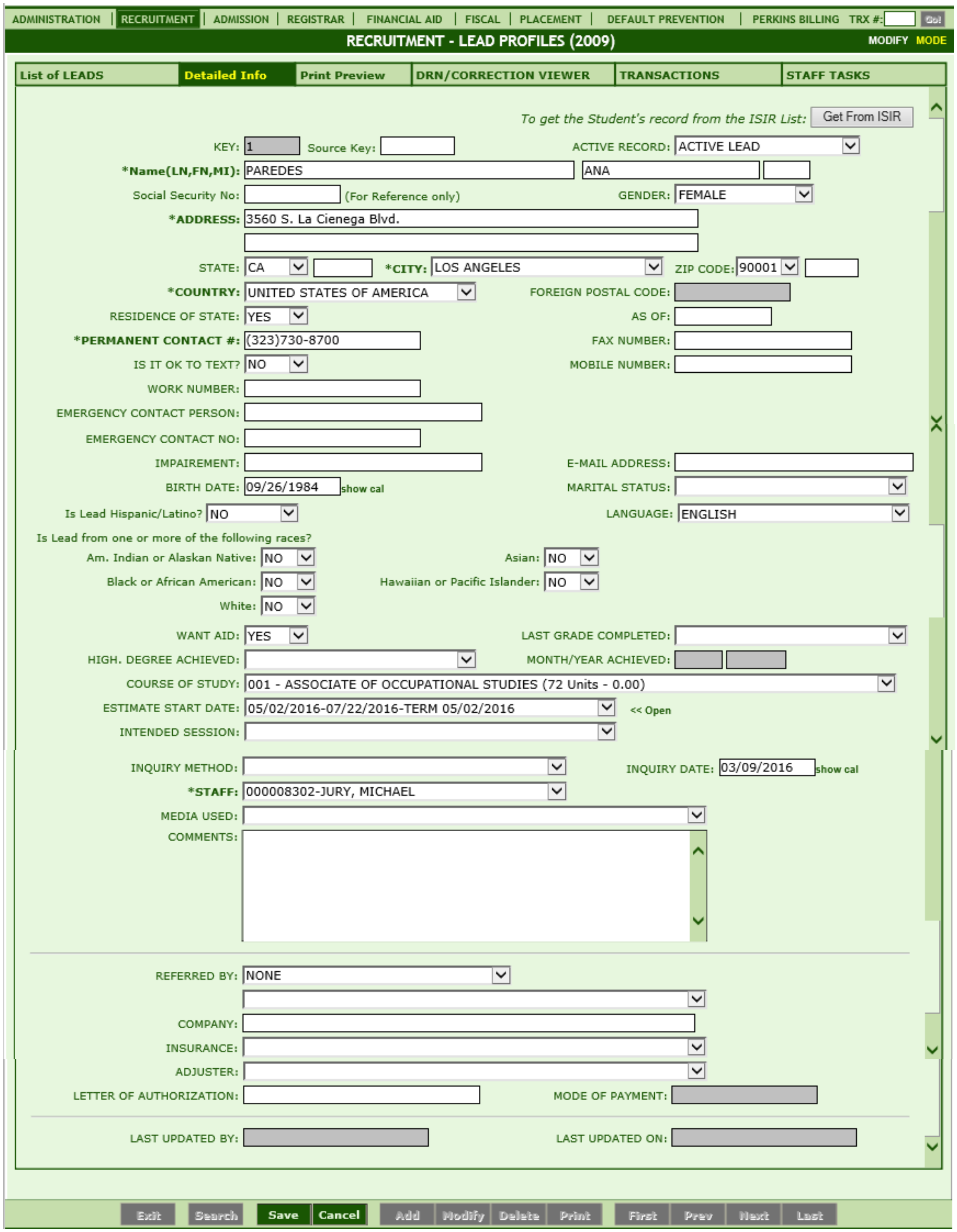
- When the Lead Card is saved it becomes a Lead Profile.
- When a lead is moved to admissions, the students lead card becomes inactive
- Do not use the following characters in the entry of data: “ “ ( ) or the Tab Key i.e.,. Smith, Bob “Rocky” or Smith, Bob (Rocky) and Smith, Bob (tabbed space) Rocky.
- NA (Non-Applicable) can be used for the required fields and has been set to the default value for the address. If you know the lead’s address just type over the NA.
- Once the Lead Card is saved, a Lead Profile becomes available. You will see the following link above the buttons at the bottom of the page. You may click this link to go to the lead’s Lead Profile.



Field	Description
Key	Refers to the number sequentially assigned for each entry
Source Key	Not for manual entry. Refers to how the record was entered.
Active Record	Refers to the Status of the Lead Card/profile
Name (LN,FN, MI)	Name of the lead
Social Security Number	The Lead’s Social Security Number
Gender	The lead’s sex type (female or male)
Address, State, City, Zip code, Country	The Lead’s full address
Foreign Postal Code	Postal Code of the country if other than United States
Residence of State	Yes-if the Lead is a resident of the state listed for their address
As of	Date Lead became a resident of the state above
Want FA Aid	Yes- of Lead is interested in Title IV
Permanent Contact #, Fax Number, Secondary Number, Work Number	Permanent Contact #- Lead’s primary phone number, Fax, Secondary and Work numbers to contact the Lead.
Is Lead Hispanic/Latino?	Yes if Lead is part or full Hispanic/Latino.
Email Address	Lead’s current email address
Races: American Indian or Alaskan Native, Asian, Black or African American, Hawaiian or Pacific Islander, White	If student is not part or full Hispanic/Latino then select the applicable race. Multiple YES are allowed.

Course of Study	The course of study the lead is interested in taking when they initially call the school. The options here are defined under Administration>Program Set-up.
Estimated Start Date	The start date the lead is interested in starting their training for the course of study chosen. Options here are defined under Trx 1020 & 1021. Option to ADD different start date here is allowed.
Intended Session	This is the session type the lead wishes to attend defined in the TRX #3007 Type Flag Definitions
Inquiry Method	This is the leads inquiry method which brought the lead to the school. The dropdown choices are defined in the control TRX # 2004 Kinds of Inquiry
Inquiry Date	The date the lead inquired or contacted the school for information about training
Staff	The staff the lead is assigned to. The dropdown choices are defined by assigning the staff member to the recruitment or admissions department in TRX # 1041 Employees. (employee profile)
Media Used	The media which brought the lead to the school as defined in the control TRX # 2003 Advertising Media Usage
Comments	Note comments that would be potentially helpful for the staff member or school to remember
Referred By	Type of Outside Agency who referred the Lead to the School. Options here are defined under Trx 1002, 2006 & 2007.
Fund Source	More specific type of Outside Agency who referred the Lead to the School. Options here are defined under Trx 1002, 2006 & 2007.
Company	Company Name of referral source.
Insurance	If Lead is being referred to school and an insurance co. is involved in payments of tuition, select this option. Options here are defined under Trx 1002, 2006 & 2007.
Adjuster	Name of Insurance adjuster working with Lead
Letter of Authorization	Type of Authorization Letter provided by third party for payment
Mode of Payment	Refers to how the payments will be submitted to school
Last Updated By	RGM generated field used to note the last staff member who updated the lead card/profile
Last Updated On	RGM generated field used to note the last date the lead card/profile was updated

Lead Profile [2009]



ADMINISTRATION | RECRUITMENT | ADMISSION | REGISTRAR | FINANCIAL AID | FISCAL | PLACEMENT | DEFAULT PREVENTION | PERKINS BILLING TRX #: Go!

RECRUITMENT - LEAD PROFILES (2009) MODIFY MODE

List of LEADS | Detailed Info | Print Preview | DRN/CORRECTION VIEWER | TRANSACTIONS | STAFF TASKS

To get the Student's record from the ISIR List: Get From ISIR

KEY: 1 Source Key: ACTIVE RECORD: ACTIVE LEAD

*Name(LN,FN,MI): PAREDES ANA

Social Security No: (For Reference only) GENDER: FEMALE

*ADDRESS: 3560 S. La Cienega Blvd.

STATE: CA *CITY: LOS ANGELES ZIP CODE: 90001

*COUNTRY: UNITED STATES OF AMERICA FOREIGN POSTAL CODE:

RESIDENCE OF STATE: YES AS OF:

*PERMANENT CONTACT #: (323)730-8700 FAX NUMBER:

IS IT OK TO TEXT? NO MOBILE NUMBER:

WORK NUMBER:

EMERGENCY CONTACT PERSON:

EMERGENCY CONTACT NO:

IMPAIREMENT: E-MAIL ADDRESS:

BIRTH DATE: 09/26/1984 show cal MARITAL STATUS:

Is Lead Hispanic/Latino? NO LANGUAGE: ENGLISH

Is Lead from one or more of the following races?

Am. Indian or Alaskan Native: NO Asian: NO

Black or African American: NO Hawaiian or Pacific Islander: NO

White: NO

WANT AID: YES LAST GRADE COMPLETED:

HIGH. DEGREE ACHIEVED: MONTH/YEAR ACHIEVED:

COURSE OF STUDY: 001 - ASSOCIATE OF OCCUPATIONAL STUDIES (72 Units - 0.00)

ESTIMATE START DATE: 05/02/2016-07/22/2016-TERM 05/02/2016 << Open

INTENDED SESSION:

INQUIRY METHOD: INQUIRY DATE: 03/09/2016 show cal

*STAFF: 000008302-JURY, MICHAEL

MEDIA USED:

COMMENTS:

REFERRED BY: NONE

COMPANY:

INSURANCE:

ADJUSTER:

LETTER OF AUTHORIZATION: MODE OF PAYMENT:

LAST UPDATED BY: LAST UPDATED ON:

Exit | Search | Save | Cancel | Add | Modify | Delete | Print | First | Prev | Next | Last

Module Description

The Lead Profile consists of 6 tabs (List of Leads, Detailed Information, Print Preview, DRN Correction Viewer, Transactions and Staff Tasks.) The first point of entry for a Lead is recording their personal contact information under either Lead Card or Lead Profile (info saved on a Lead Card may also be accessed in a Lead Profile). Lead follow-up efforts are documented on the students Lead Profile as transactions. Also at this time more information is recorded on the Lead Profile Detailed Info tab about the student as it is obtained during the recruitment process.

The Staff Task tab provides a list of task that the recruiter or Admissions Rep needs to follow up on.

Lead Profile:

- If the recruiter or Admissions Rep wants to initially record more detailed information they can create a Lead Profile instead of a Lead Card. The Lead Card opens in ADD mode and is ready for quick entry. .
- The required fields are bolded and marked with an * asterisk. You may document as much detailed information as you would like, but the required fields must be completed in order to save the lead profile.
- When a lead is moved to admissions the student's Lead Profile becomes inactive.

Transactions:

- Required Transactions must be posted in order and have the correct status before posting the next transaction.

  Appointment
    Status: Showed or No Showed
  Application
    Status: Accepted for Enrollment
  Enrollment
    Status: Move to Admissions

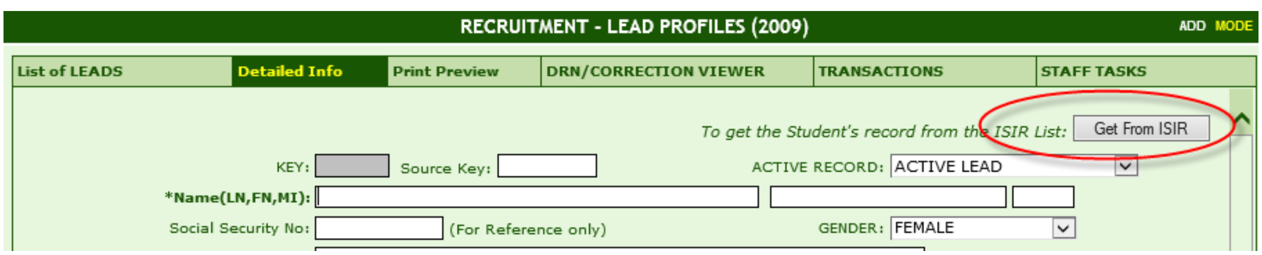
- An Enrollment transaction must be posted with a status of *Move to Admissions* before a lead can be moved to admissions.
- Do not use the following characters in the entry of data: " " ( ) or the Tab Key i.e.,. Smith, Bob "Rocky" or Smith, Bob (Rocky) and Smith, Bob (tabbed space) Rocky.
- NA (Non-Applicable) can be used for the required fields and has been set as the default value for the address. If you know the leads address just type over the NA.

Field	Description
Key	Refers to the number sequentially assigned for each entry
Key Source	
Active Record	Refers to the status of the Lead Profile

Name (LN,FN, MI)	Name of the lead (last, first, middle initial)
Social Security Number	The Lead's Social Security Number
Gender	The lead's sex type (female or male)
Address, City, State, Zip code, Country	The Lead's Address, City, State, Zip code, Country
Foreign Postal Code	Postal code of country if different than United States
Residence of State	Yes-Lead is a resident of the State in Current Address. No- Lead is not a resident of the State in current address
As Of	The date the lead became a residence of the state
Permanent Contact Number, Fax Number, Mobile Number, Work number	The Lead's primary phone number, fax number, mobile phone number and work phone number
Is it OK to text?	Yes- indicates the Lead allows receiving a text from school. No- indicates the Lead doesn't want to receive texts from school.
Emergency Contact Person and No.	Refers to the Name and phone number of the person to contact in the event of an emergency regarding the Lead.
Impairment	Listing of any impairments the Lead may have
Email Address	The Lead's email address
Birth Date	The Lead's Date of Birth
Marital Status	Refers to whether the Lead is married or not
Is Lead Hispanic/Latino?	Yes- Lead is of some or all Hispanic/Latino ethnicity. No- Lead is not from any Hispanic/Latino Ethnicity.
Language	Primary Language spoken by the Lead
Is Lead from one of the following Races?	Select the Race(s) of the Lead (multiple Yes answers allowed)
Want Aid?	Yes- the Lead is interested in Title IV Aid. No- Lead is not interested in Title IV Aid
Last Grade Completed	Refers to the last grade level completed by the Lead prior to enrolling into your school
Highest Degree Achieved?	Highest Degree Achieved by the Lead prior to enrolling into your school
Month/Year Achieved?	The Date the Lead Achieved their Highest Level of Education prior to enrolling at your school.
Course of Study	The course of study the lead is interested in taking when they initially call the school
Estimated Start Date	The start date the lead is interested in starting their training for the course of study chosen
Intended Session	This is the session type the lead wishes to attend defined in the TRX #3007 Type Flag Definitions
Inquiry Method	This is the leads inquiry method which brought the lead to the school. The dropdown choices are defined in the control TRX # 2004 Kinds of Inquiry

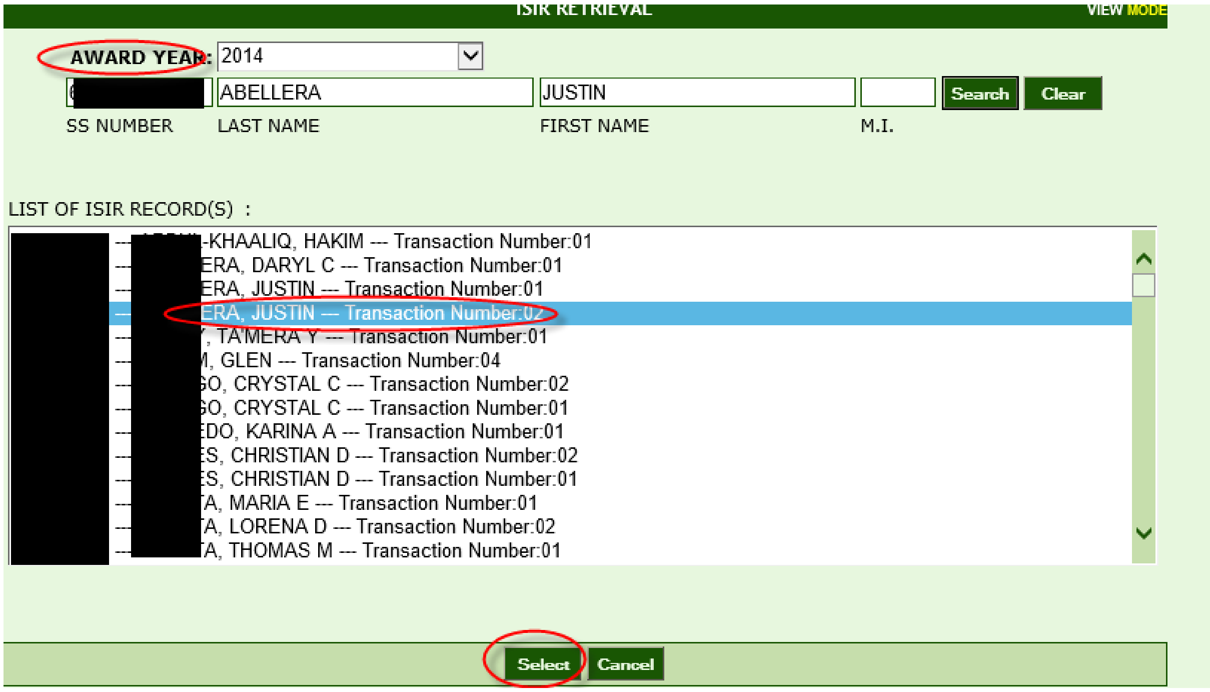
Inquiry Date	The date the lead inquired or contacted the school for information about training
Staff	The staff the lead is assigned to. The dropdown choices are defined by assigning the staff member to the recruitment or admissions department in TRX # 1041 Employees. (employee profile)
Media Used	The media which brought the lead to the school as defined in the control TRX # 2003 Advertising Media Usage
Comments	Note comments that would be potentially helpful for the staff member or school to remember
Referred By	Type of Outside Agency who referred the Lead to the School. Options here are defined under Trx 1002, 2006 & 2007.
Company	Company Name of referral source.
Insurance	If Lead is being referred to school and an insurance co. is involved in payments of tuition, select this option. Options here are defined under Trx 1002, 2006 & 2007
Adjuster	Name of Insurance adjuster working with Lead
Letter of Authorization	Type of Authorization Letter provided by third party for payment
Mode of Payment	Refers to how the payments will be submitted to school
Last Updated By	RGM generated field used to note the last staff member who updated the lead card/profile
Last Updated On	RGM generated field used to note the last date the lead card/profile was updated

Loading the Student Data from the "Get From ISIR Button"



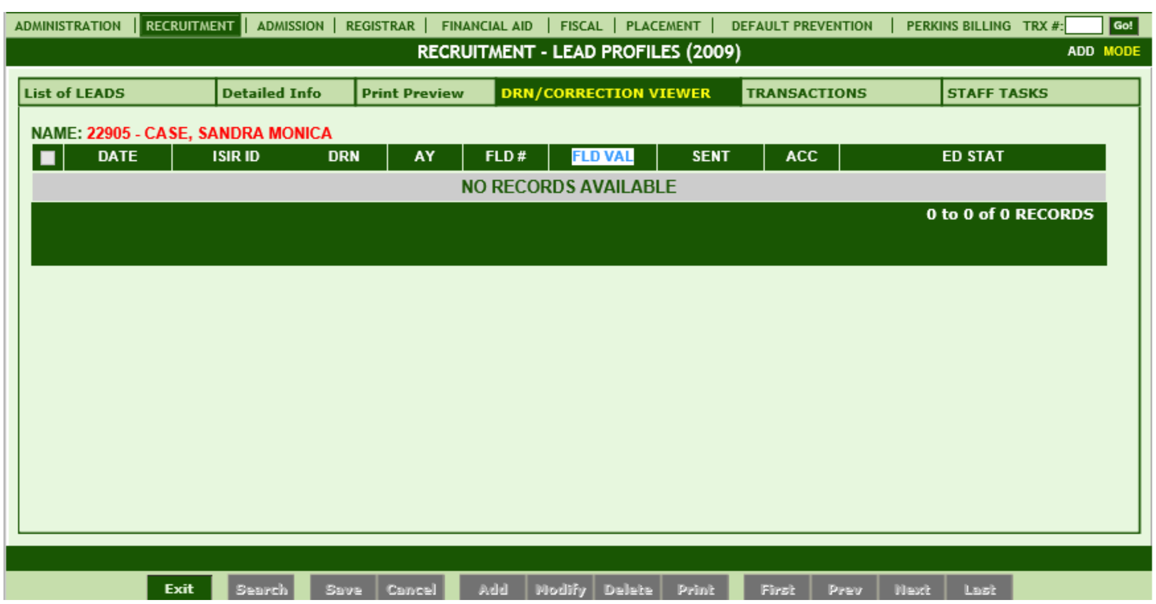
After clicking ADD and prior to entering data into the fields, you may click **GET FROM ISIR** button at the top right. If the prospective student already has an ISIR received in RGM, this will allow their personal data to be copied from the ISIR directly into the Lead Profile.

- Click GET FROM ISIR/Select the Award Year/Click on the selected prospective student/click Select



Once the data from the ISIR is populated into the profile, enter the remaining data and click SAVE

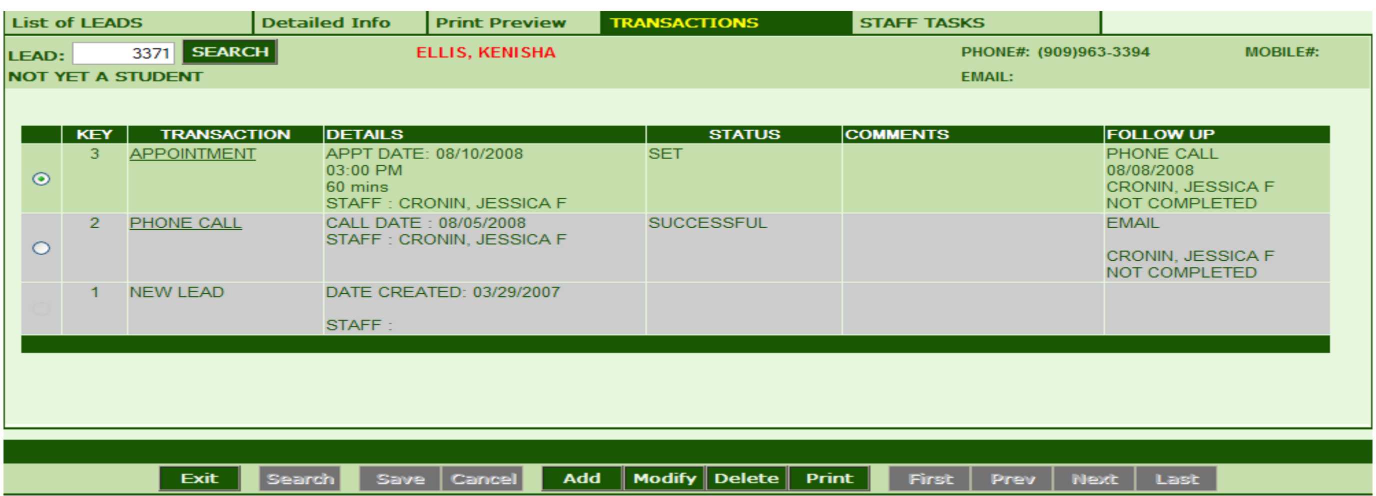
Lead Profile-DRN/Correction Viewer Tab



The DRN Correction Viewer Tab allows you to view the corrections made to a Lead's ISIR as well as enter a DRN number for a Lead to be automatically sent to request their ISIR.

Field	Description
Date	Date the DRN was entered or other ISIR changes were made
ISIR ID	Refers to the ID# of the ISIR
DRN	Refers to the Four digit DRN number assigned to the Lead to request their ISIR
AY	Award Year of the ISIR
FLD#	Field number on the ISIR
FLD Val	Value entered in the selected field on the ISIR
Sent	Status of RGM sending the ISIR correction/DRN #
ACC	Yes or No if the ISIR correction was accepted
ED Stat	Status of receiving the ISIR back from ED with correction made.

Lead Profile-Transactions Tab



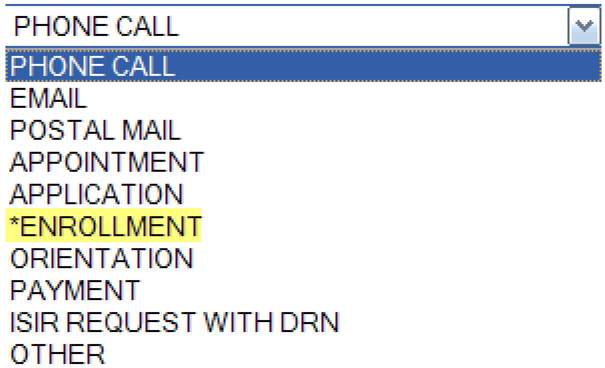
The transactions Tab allows you to track transactions as they occur in the Recruitment process. Transactions to display here are first set-up under Trx 2005-Kinds of Recruitment Transactions. Transactions posted here may also be tracked under Recruitment Reports- Lead List. Follow-up Tasks can be added under this Tab and printed under the Staff Tasks Tab.

Adding a Transaction Record:

1. If there are existing record(s) to display the screen will list all transaction entered and maintained in the system. To add or create a record, click the **ADD** button on the toolbar. To MODIFY an existing transaction, click the **MODIFY** button on the toolbar.

NOTE: The NEW LEAD transaction is automatically generated by the system when the Lead Card/Profile is saved and cannot be deleted or modified.

2. Choose from one of the following transactions available in the Transactions dropdown menu:

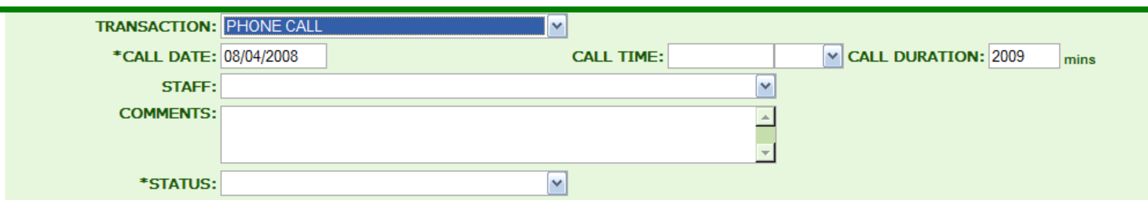


NOTE: Required transactions are marked with an asterisk. Required fields are defined in TRX # 2005 Kinds of Transactions. See the help files for TRX # 2005 Kinds of Transactions for more detailed information.

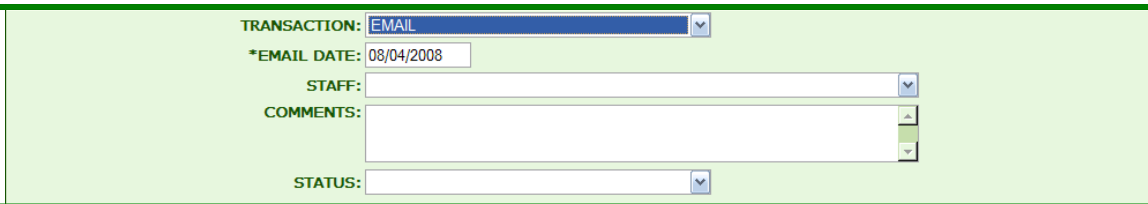
3. When all necessary entries have been made, save the created record by clicking the **SAVE** button on the toolbar. If you want to cancel the process, just click the **CANCEL** button and the system will bring you back to View Mode.

TRANSACTION FIELD DESCRIPTIONS

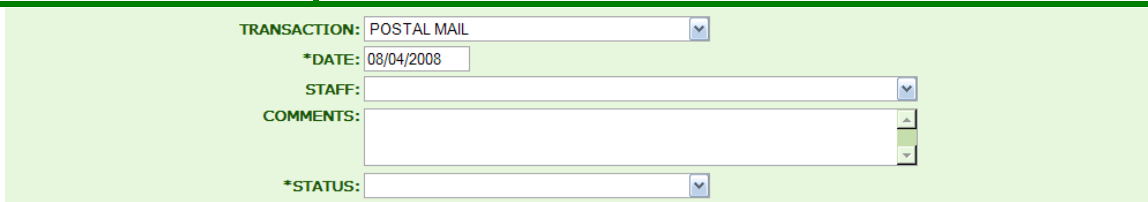
Fields that are common to all transactions are only listed once



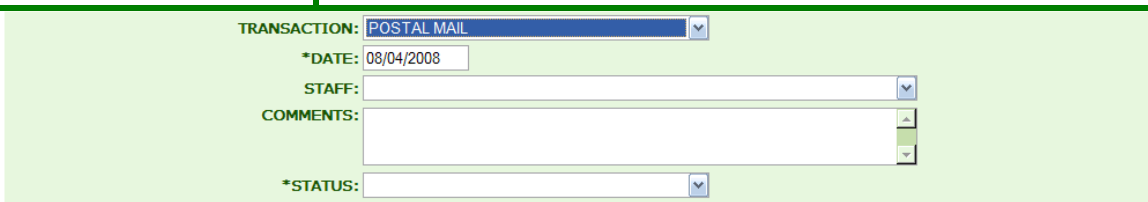
Phone Call Fields	Descriptions
Call Date, Time & Duration	Enter the date, time and call duration in minutes
Staff	Choose the staff member assigned to the transaction
Comments	The comment box is for the transaction comments and follow up task comments
Status	Successful: if you were able to talk to the lead then it is successful. If you were not able to talk to the lead, left a message, etc, it is unsuccessful and if you were able to schedule an appointment then post a status of Scheduled Appointment. After saving an appointment transaction will automatically open in add mode for the appointment to be posted.



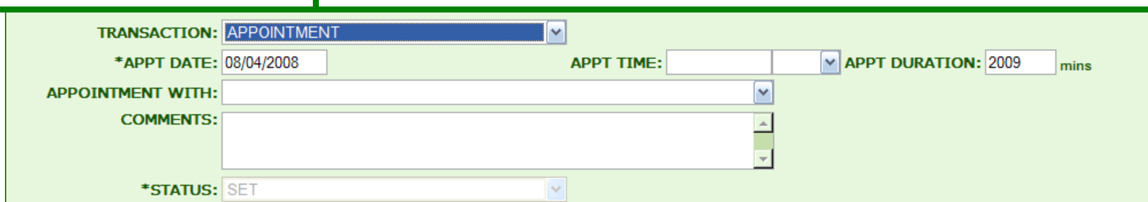
Email Fields	Descriptions
Email Date	The date the email was sent



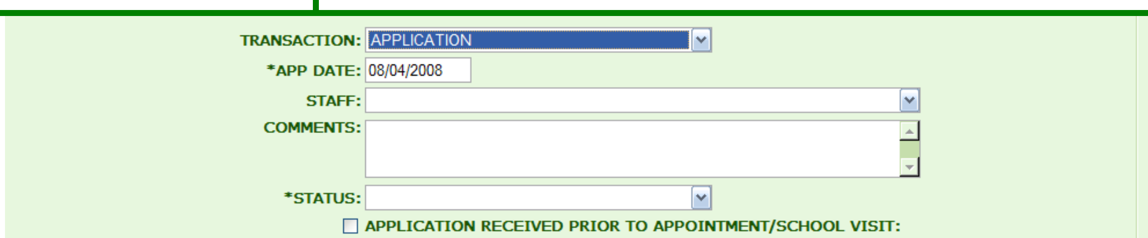
Postal Mail Fields	Descriptions
Postal Mail Date	The date the postal mail was mailed



Appointment Fields	Descriptions
Appt Date, Time & Duration	The date & time of the appointment and expected appointment duration in minutes. The system will not allow you to over book
Appointment With	The staff member the appointment is with

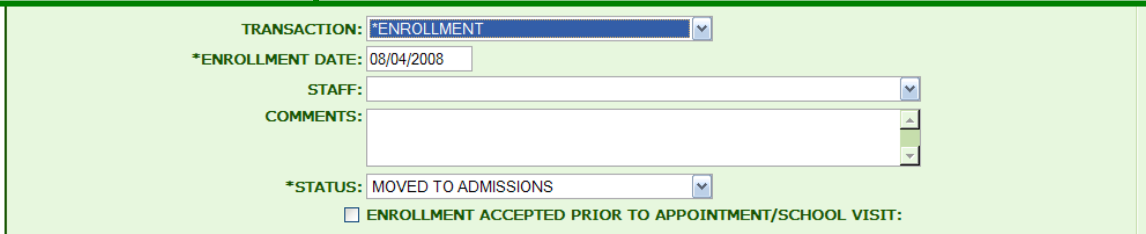


Application Fields	Descriptions
Application Date	The date the application was received
Application Received Prior To Appointment/School Visit	If the application was received prior to the appointment/school visit check this box (Ex. application forms and fees sent via mail prior to visiting the school).

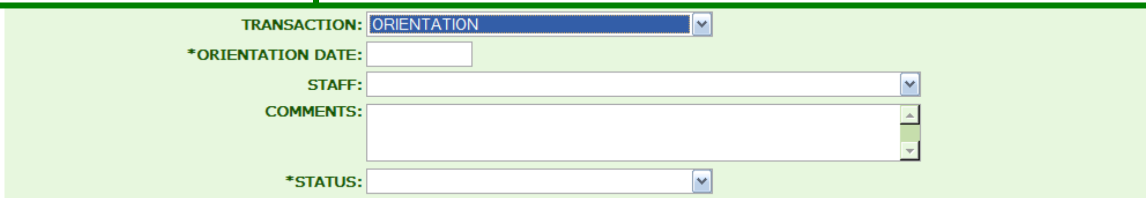


Enrollment Fields	Descriptions
Enrollment Date	The date the enrollment agreement was completed.

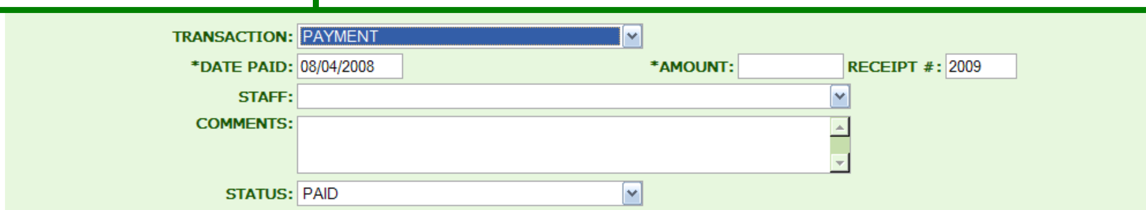
Enrollment Accepted Prior To Appointment/School Visit	If the enrollment was received prior to the appointment/school visit check this box (Ex. application and enrollment forms sent via mail prior to visiting the school).



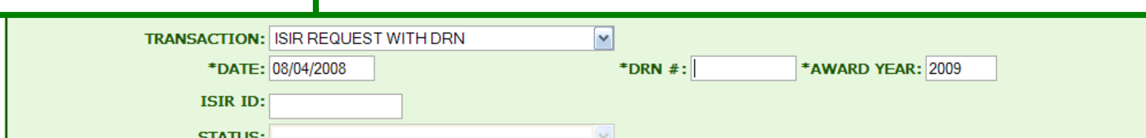
Orientation Fields	Descriptions
Orientation Date	The date of the student's scheduled orientation.



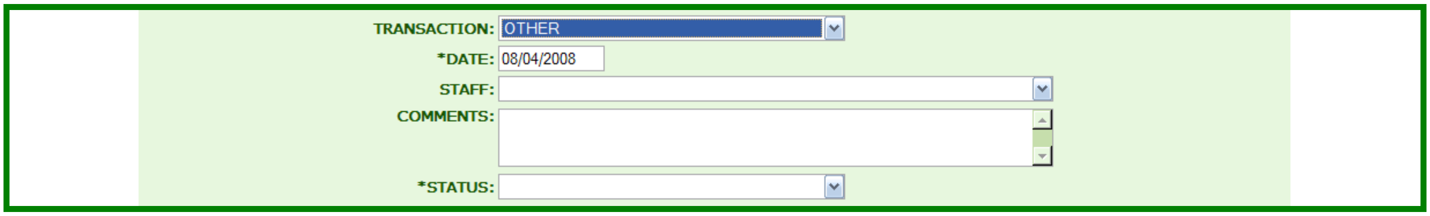
Payment Fields	Descriptions
Date Paid	The date the school received the money from the lead/student.
Amount	The amount the school received from the lead/student.
Receipt #	The receipt number issued



ISIR Request with DRN Fields	Descriptions
Date	The date the DRN request was made
DRN #	The DRN #
Award Year	The award year
ISIR ID	The ISIR ID

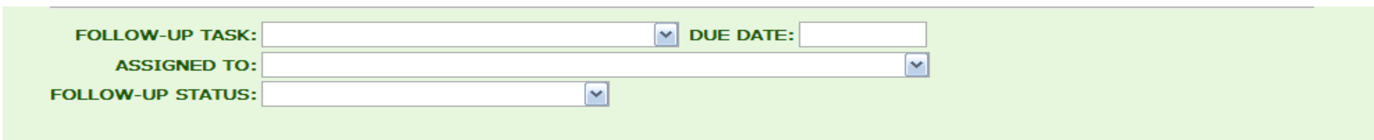


Other Fields	Descriptions
Date	The date of the Other transaction

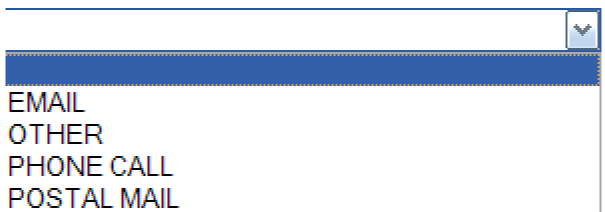


CREATING A FOLLOW-UP TASK RECORD

1. If there are existing record(s) to display, the screen will list all Follow-Up Tasks entered and maintained in the system. To add or create a record, click the **ADD** button on the toolbar. To MODIFY an existing transaction, click the **MODIFY** button on the toolbar.

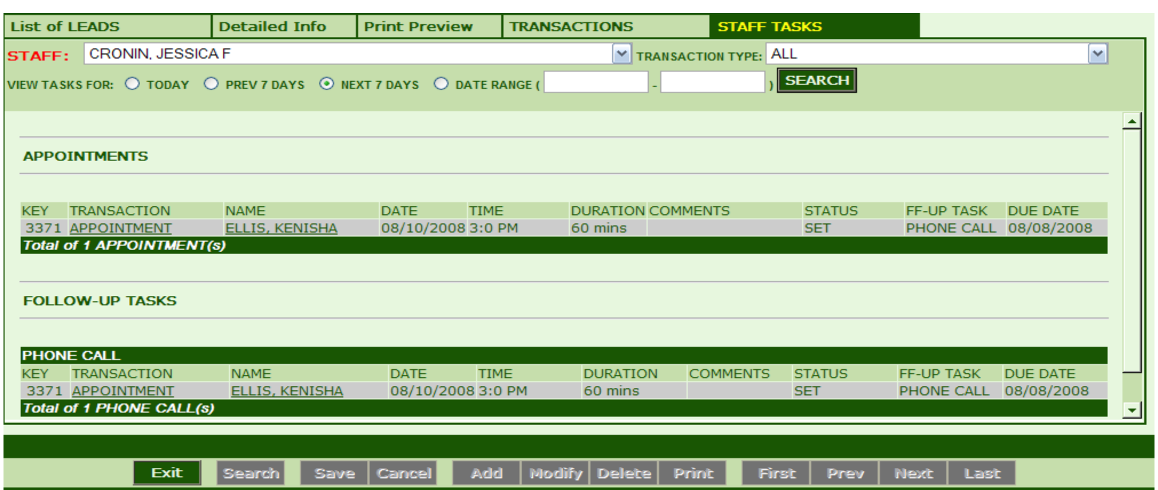


2. Choose from one of the following transactions available in the Follow-Up Task dropdown menu:



3. When all necessary entries have been made, save the created record by clicking the **SAVE** button on the toolbar. If you want to cancel the process, just click the **CANCEL** button and the system will bring you back to View Mode.

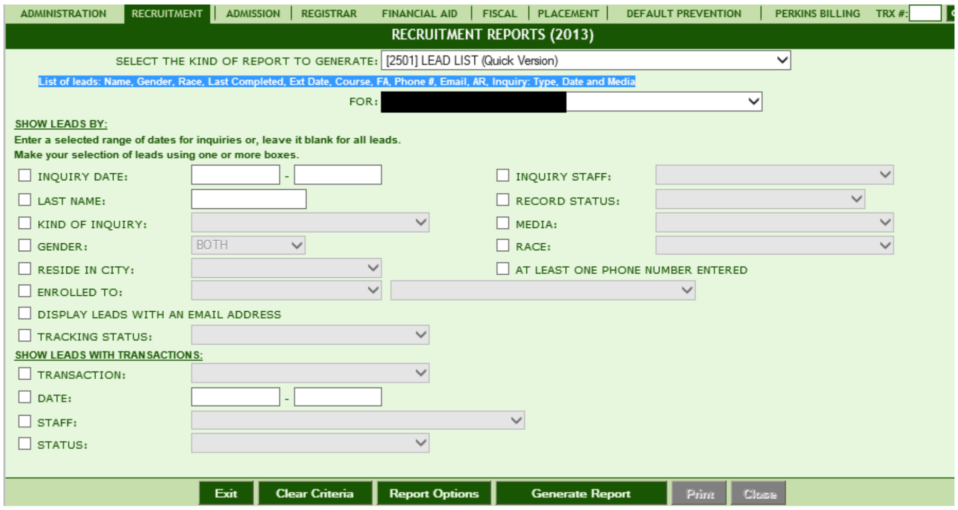
Lead Profile- Staff Tasks Tab



You can view your Follow-up Tasks from the Staff Task tab. If you have permission to view other staff member's tasks then choose the staff member's name from the Staff dropdown menu. Appointments are also listed as well as any reassigned leads assigned to the Recruiter or Admissions Rep. Click the lead, task or appointment and update the status as needed.

Recruitment Reports [2013]

Recruitment Reports>2501 Lead List Report



The **Lead List Report** can be generated using any of the following criteria:

Inquiry Dates, Name, Staff, Gender, Inquiry Type (Internet, Event, Walk-In, Mail, Phone), Inquiry Status (Active or Inactive), Media Type, Race, Only with Phone # or Email, City, Program of Interest, Transaction Status (New Lead, Appointment Set/Show, Application accepted, Enrolled)

Recruitment Report Criteria	Descriptions
Inquiry Date	Refers to the date the Lead contacted the school to inquire about attending. Date comes from “Inquiry Date” located in Lead Card/profile
Inquiry Staff	Refers to the Admissions Representative assigned under the Lead Card/profile.
Last Name	Refers to the Lead’s Last name in the Lead Card/profile
Record Status	Active Vs Inactive: When a Lead Card/Profile is “Moved to Admissions” and a Student Profile is saved, the Lead Profile becomes Inactive.
Kind of Inquiry	Refers to the method stated in the Lead Card/profile used to contact the school i.e. Mailed, phoned, emailed. Options here are defined under Trx 2004 and assigned to each Lead under 2008/2009.
Media	Refers to the Media Type used to capture the Lead. Options here are defined under Trx 2002 and assigned to each Lead under 2008/2009
Gender	Refers to the Lead’s Gender in the Lead Card/profile
Race	Refers to the Lead’s Gender in the Lead Card/profile
Reside in City	Refers to the city of residency in the Lead Card/profile.

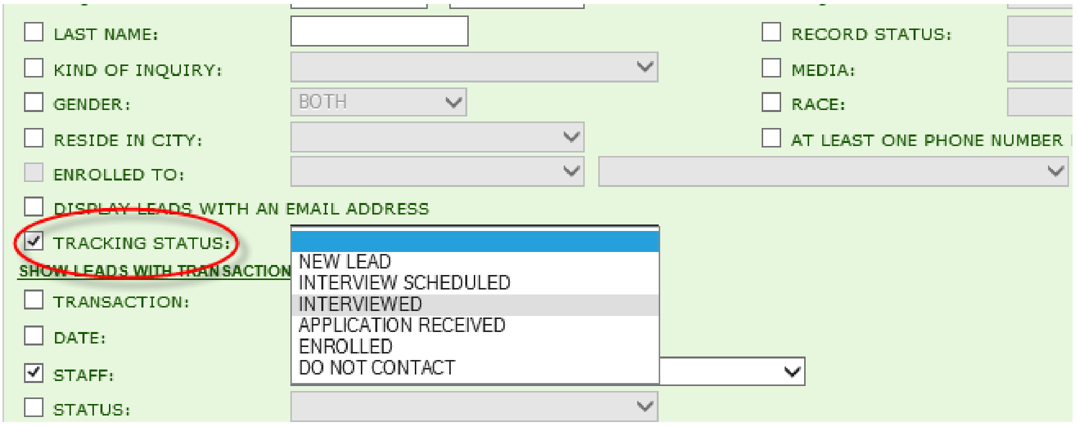
At least one phone number entered	Will only display those Leads with a phone number in the Lead Card/profile.
Enrolled to	Refers to the Program of Interest in the Lead Card/profile.
Display Leads With an Email Address	Will only display those Leads with an email address in the Lead Card/profile.
Tracking Status	Refers to the "current" transaction tracking status assigned under the Lead Profile- Transactions Tab. Options are New Lead, Interview Set, Interviewed, Applicant, Enrolled Do not Contact.
Transaction	Will generate Leads with any of the selected transactions posted under Lead Profile-Transactions Tab. Unlike "tracking status", the selected transaction doesn't need to be their "current" transaction status.
Date	Refers to the selected transaction occurring within this date range
Staff	Refers to the school staff who performed the selected transaction
Status	Refers to the current status of the selected transaction

Any of the following data options can be displayed on the Student List Report by making the selection under Report Options:

☑	GENDER	☑	LAST GRADE COMPLETED
☑	ADDRESS	☑	TARGET DATE
☑	CITY	☑	TARGET COURSE
☑	STATE	☑	WANT FINANCIAL AID
☑	ZIP CODE	☑	PHONE NUMBER
☑	BIRTH DATE	☑	E-MAIL ADDRESS
☑	HIGHEST DEGREE ACHIEVED	☑	ADMISSION REPRESENTATIVE
☑	MONTH & YEAR ACHIEVED	☑	INQUIRY METHOD
☑	RACE	☑	INQUIRY DATE
☑	MEDIA USED	☑	RECORD STATUS
☑	TRACKING STATUS	☐	SOURCE KEY
☐	MOBILE NO.		

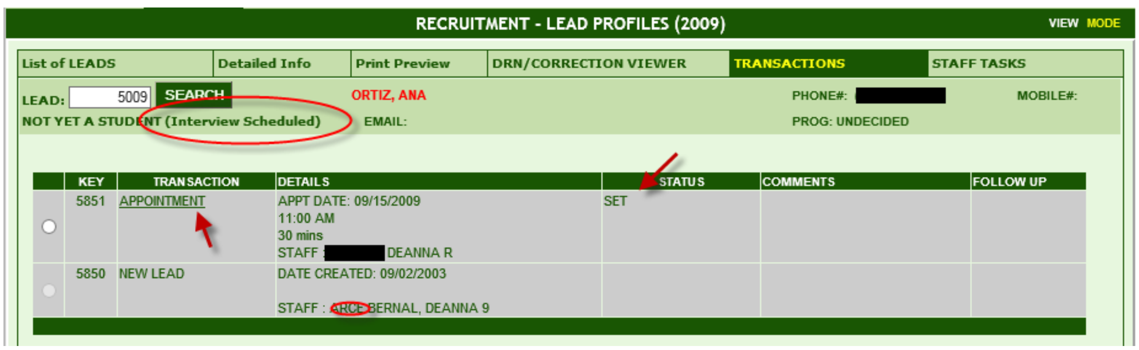
Generating the Lead List Report by Transaction Status:

To generate the report by Transaction status (i.e. prospective students who have not yet scheduled a recruitment interview, OR scheduled an interview but have yet to interview with admissions, OR interviewed but have yet to submit an application, OR have been interviewed and submitted an application but have yet to enroll), Use the "**Tracking Status**" dropdown from the report criteria.

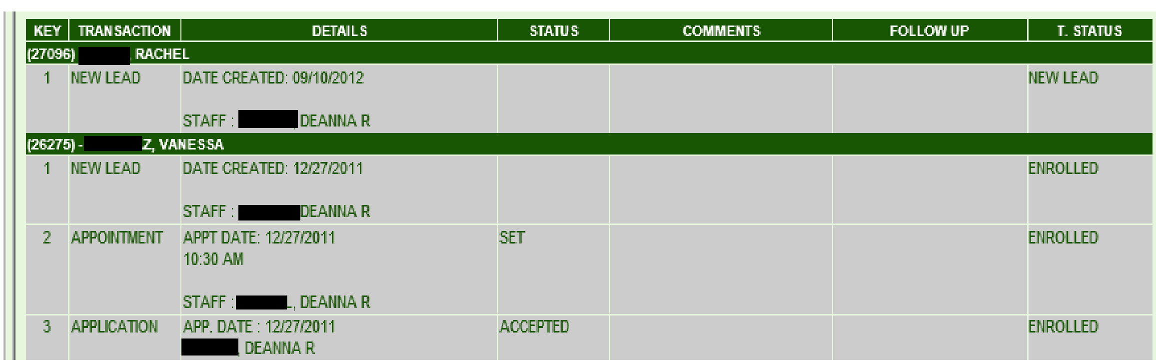


“Tracking Status” refers to the “<u>CURRENT</u>” Recruitment transaction status of each prospective student under the TRANSACTIONS TAB in the Lead Profile trx 2009 (see screen shot below).

Once an Interview is scheduled, the status is “Interview Scheduled” until the status of that appointment is changed to “SHOWED”, at that time the Lead’s status will change to “Interviewed”. The status will change from “Interviewed” to “Application Received” upon posting an “Application” transaction. Finally the status will change to “Enrolled” upon posting an enrollment transaction



Recruitment Reports>2502 Lead Transactions Report



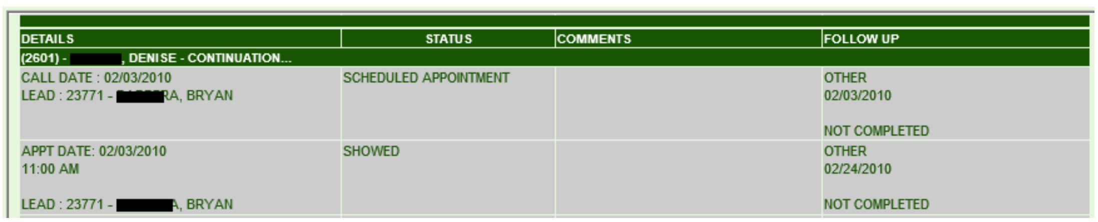
KEY	TRANSACTION	DETAILS	STATUS	COMMENTS	FOLLOW UP	T. STATUS
(27096) [redacted] RACHEL						
1	NEW LEAD	DATE CREATED: 09/10/2012 STAFF : [redacted] DEANNA R				NEW LEAD
(26275) - [redacted] Z, VANESSA						
1	NEW LEAD	DATE CREATED: 12/27/2011 STAFF : [redacted] DEANNA R				ENROLLED
2	APPOINTMENT	APPT DATE: 12/27/2011 10:30 AM STAFF : [redacted], DEANNA R	SET			ENROLLED
3	APPLICATION	APP. DATE : 12/27/2011 [redacted] DEANNA R	ACCEPTED			ENROLLED

The **Lead Transaction Report** is a Transaction Listing for each Lead: Details, Staff, Status, Comments and Follow-up will display.

Report Labels	Descriptions
Key	Refers to the Lead Key assigned automatically to each prospective student upon saving a Lead Card or Lead Profile.

Transaction	Refers to the Transactions posted under Lead Profile- Transactions Tab
Details	Refers to the transaction date, staff assigned to the transaction and any other specifics entered or selected under each transaction
Status	Refers to the current status assigned to each transaction under Lead Profile- Transactions Tab
Comments	Refers to the comments entered under each transaction by the Staff member under Lead Profile- Transactions Tab
Follow UP	Refers to the follow up assignments added to each transaction under Lead Profile- Transactions Tab
T. Status	Refers to the status of the Lead record, if the lead was already enrolled it will display "Enrolled" if the record is not yet enrolled, it will display "Lead"

Recruitment Report>2503 Transactions by Staff Report

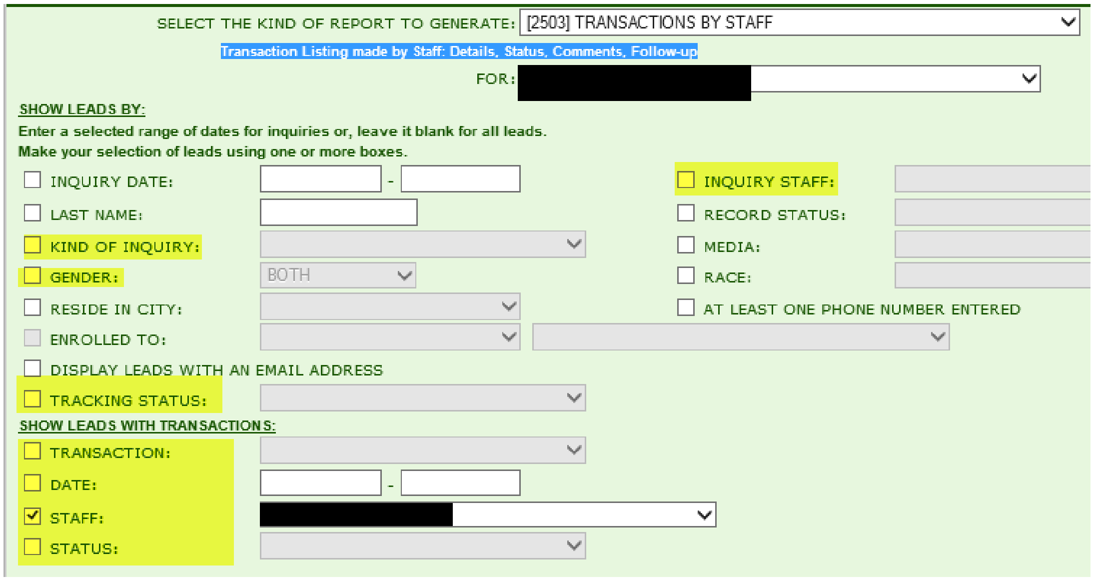


DETAILS	STATUS	COMMENTS	FOLLOW UP
(2601) - [redacted], DENISE - CONTINUATION...			
CALL DATE : 02/03/2010 LEAD : 23771 - [redacted], BRYAN	SCHEDULED APPOINTMENT		OTHER 02/03/2010 NOT COMPLETED
APPT DATE: 02/03/2010 11:00 AM LEAD : 23771 - [redacted], BRYAN	SHOWED		OTHER 02/24/2010 NOT COMPLETED

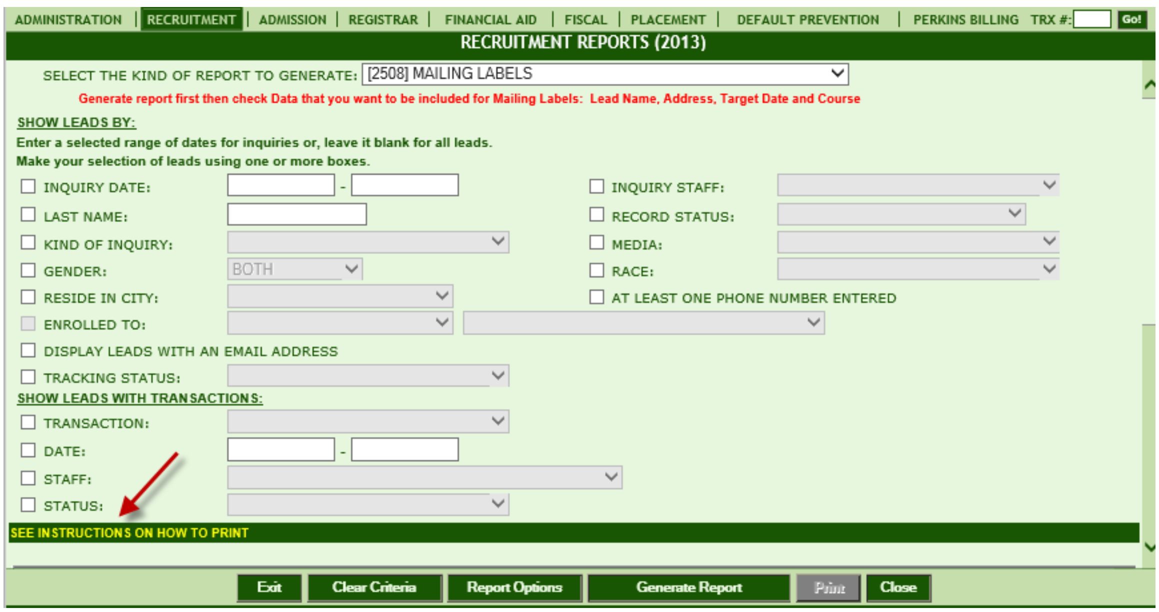
The **Transactions by Staff Report** is separated by recruitment staff and displays their recruitment transactions including each prospective student's name, all recruitment transactions posted including the status, comments and follow ups.

Report Labels	**Descriptions**
Details	Refers to the transaction date, staff assigned to the transaction and any other specifics entered or selected under each transaction
Status	Refers to the current status assigned to each transaction under Lead Profile- Transactions Tab
Comments	Refers to the comments entered under each transaction by the Staff member under Lead Profile- Transactions Tab
Follow UP	Refers to the follow up assignments added to each transaction under Lead Profile- Transactions Tab

This report can be generated using any of the following highlighted criteria:

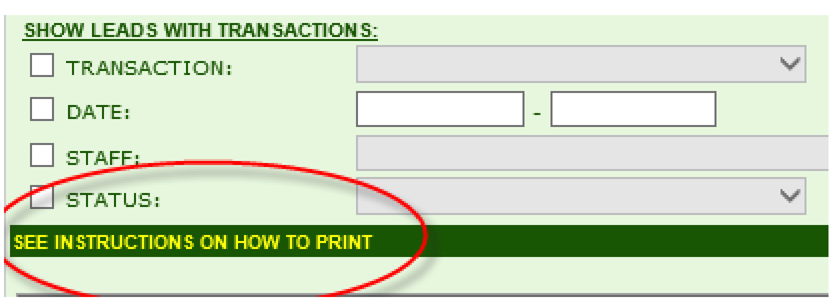


Recruitment Reports>2508 Mailing Labels Report

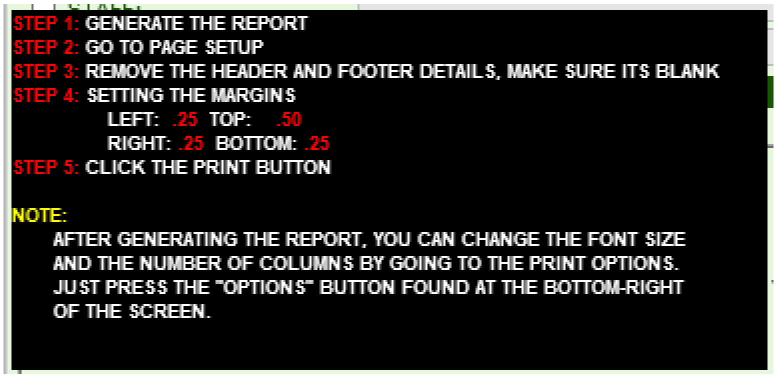


Mailing Labels allow you to generate the report first then check Data that you want to be included for Mailing Labels: Lead Name, Address, Target Date and Course.

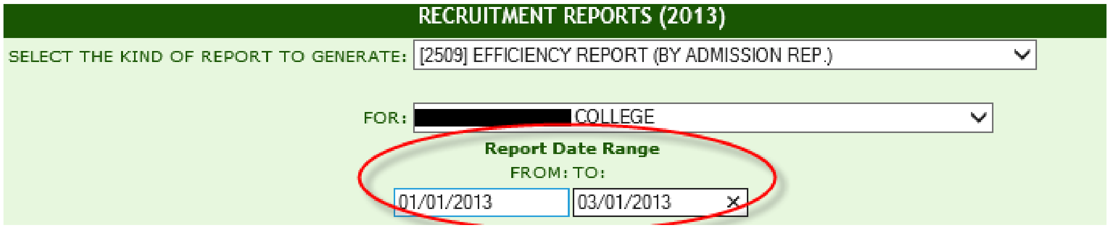
TIP: After generating the report, a link to view Print Instructions will appear in the Top Left Side of the report, place your mouse over this link to view.



Print Instructions will appear for page setup as shown below.



Recruitment Reports>2509 Efficiency Report



The **Efficiency Report** can display all conversion rates for each Admissions Representative.

The name of each Admissions Rep, their Leads, Interviews scheduled, Interviewed, Applications, Enrollments, Actual Starts, Graduates, Graduate Licensing Exams and Graduate Placement are analyzed.

All sections are broken down by Media Type, and Conversion Rates are provided for the following: Leads to Appointments, Appt. Set to Appt. show, Interviews to Enrollments, Applications to Enrollments, Leads to Enrollments, Enrollments to Actual Starts, Leads to Graduates, Interviews to Graduates, Enrollments to Graduates, Actual Starts to Graduates.

Leads:

Leads

Admiss. Rep. Name	TONY S	DEANNA R	S, TAYLOR S	KELLY H	NICHOLAS H	Total
NO MEDIA	1 (2.22%)	3 (6.67%)	2 (4.44%)	1 (2.22%)	38 (84.44%)	45
[BILLBOARD/DISPLAY] Building		10 (34.48%)		1 (3.45%)	18 (62.07%)	29
[DIRECT MAIL/FLIERS] Flyers		1 (100.00%)				1
[INTERNET] Search Engine		65 (58.56%)		5 (4.50%)	41 (36.94%)	111
[INTERNET] Web Site		26 (100.00%)				26
[NEWSPAPER] LA Times					1 (100.00%)	1
[PHONE BOOK] White/Yellow Pages		1 (100.00%)				1
[REFERRAL] Accrediting Agency		2 (100.00%)				2
[REFERRAL] CLC Faculty/Staff Member		2 (66.67%)			1 (33.33%)	3
[REFERRAL] Clinical Site				1 (33.33%)	2 (66.67%)	3
[REFERRAL] FRIEND		24 (52.17%)		1 (2.17%)	21 (45.65%)	46
[REFERRAL] Graduate		9 (56.25%)		1 (6.25%)	6 (37.50%)	16
[REFERRAL] Student		4 (30.77%)			9 (69.23%)	13
TOTAL	1 (0.34%)	147 (49.49%)	2 (0.67%)	10 (3.37%)	137 (46.13%)	297

Appointments Set:

Admiss. Rep. Name	[redacted], DEANNA 9	[redacted], DEANNA R	[redacted], MARK	[redacted], NICHOLAS H	Total
NO MEDIA		2 (2.27%)		41 (46.59%)	43
[BILLBOARD/DISPLAY] Building			1 (2.78%)	6 (16.67%)	7
[BILLBOARD/DISPLAY] SCHOOL SIGN				1 (100.00%)	1
[INTERNET] GRADUATE REFERRAL				1 (100.00%)	1
[INTERNET] Search Engine		1 (0.88%)		2 (1.75%)	3
[INTERNET] Web Site		28 (49.12%)		3 (5.26%)	31
[NEWSPAPER] PENNY SAVER	1 (100.00%)				1
[REFERRAL] CLC Faculty/Staff Member		2 (40.00%)			2
[REFERRAL] Counselor				1 (100.00%)	1
[REFERRAL] FRIEND		5 (8.93%)		5 (8.93%)	10
[REFERRAL] Graduate		4 (16.67%)		4 (16.67%)	8
[REFERRAL] Student		1 (5.88%)		3 (17.65%)	4
[TV ADVERTISEMENT] WEB SITE			1 (100.00%)		1
TOTAL	1 (0.88%)	43 (38.05%)	2 (1.77%)	67 (59.29%)	113
Efficiency: Leads converted to Appointments		29.25%		48.91%	

Interviews:

Interviews

Admiss. Rep. Name	Total
TOTAL	0
Efficiency: Appt. Set converted to Appointments Show	

Applications:

NO MEDIA		2 (0.93%)			40 (18.69%)	42
[BILLBOARD/DISPLAY] Building				1 (1.75%)	6 (10.53%)	7
[BILLBOARD/DISPLAY] SCHOOL SIGN					1 (25.00%)	1
[INTERNET] GRADUATE REFERRAL					1 (25.00%)	1
[INTERNET] Search Engine		2 (1.59%)			2 (1.59%)	4
[INTERNET] Web Site		30 (18.52%)	1 (0.62%)		4 (2.47%)	35
[NEWSPAPER] PENNY SAVER	1 (25.00%)					1
[REFERRAL] CLC Faculty/Staff Member		2 (18.18%)				2
[REFERRAL] Counselor					1 (25.00%)	1
[REFERRAL] FRIEND		5 (5.62%)			6 (6.74%)	11
[REFERRAL] Graduate		4 (8.33%)			4 (8.33%)	8
[REFERRAL] Student		1 (3.85%)			2 (7.69%)	3
[TV ADVERTISEMENT] WEB SITE				1 (25.00%)		1
TOTAL	1 (0.85%)	46 (39.32%)	1 (0.85%)	2 (1.71%)	67 (57.26%)	117
Efficiency: Interviews converted to Applications						

Enrolled:

[INTERNET] GRADUATE REFERRAL					1 (25.00%)	1
[INTERNET] Search Engine		2 (1.59%)			2 (1.59%)	4
[INTERNET] Web Site		30 (18.52%)	1 (0.62%)		4 (2.47%)	35
[NEWSPAPER] PENNY SAVER	1 (25.00%)					1
[REFERRAL] CLC Faculty/Staff Member		2 (18.18%)				2
[REFERRAL] Counselor					1 (25.00%)	1
[REFERRAL] FRIEND		5 (5.62%)			6 (6.74%)	11
[REFERRAL] Graduate		4 (8.33%)			4 (8.33%)	8
[REFERRAL] Student		1 (3.85%)			2 (7.69%)	3
[TV ADVERTISEMENT] WEB SITE				1 (25.00%)		1
TOTAL	1 (0.85%)	46 (39.32%)	1 (0.85%)	2 (1.71%)	67 (57.26%)	117
Efficiency: Applications converted to Enrollments	100.00%	100.00%	100.00%	100.00%	100.00%	
Efficiency: Leads converted to Enrollments		31.29%			48.91%	
Efficiency: Interviews converted to Enrollments						

Actual Starts:

[INTERNET] GRADUATE REFERRAL						1 (16.67%)	1
[INTERNET] Search Engine		1 (0.78%)				2 (1.55%)	3
[INTERNET] Web Site		27 (12.50%)	1 (0.46%)			5 (2.31%)	33
[REFERRAL] CLC Faculty/Staff Member		2 (15.38%)					2
[REFERRAL] Clinical Site		1 (20.00%)					1
[REFERRAL] Counselor						1 (20.00%)	1
[REFERRAL] FRIEND		4 (3.39%)	3 (2.54%)			3 (2.54%)	10
[REFERRAL] Graduate		4 (6.78%)	1 (1.69%)			4 (6.78%)	9
[REFERRAL] Student		1 (3.57%)				1 (3.57%)	2
TOTAL	3 (2.59%)	43 (37.07%)	7 (6.03%)		1 (0.86%)	62 (53.45%)	116
Efficiency: Leads converted to Actual Starts		29.25%				45.26%	
Efficiency: Interviews converted to Actual Starts							
Efficiency: Enrolled converted to Actual Starts		93.48%	700.00%		50.00%	92.54%	

Graduates:

Graduates

Admiss. Rep. Name	[redacted], TONY S	[redacted], DEANNA 9	[redacted], DEANNA R	[redacted] JORGE G	[redacted], MARK	[redacted] SHEELA N	Total
NO MEDIA	1 (0.33%)		10 (3.34%)	7 (2.34%)			18
[BILLBOARD/DISPLAY] Building				1 (1.43%)			1
[INTERNET] GRADUATE REFERRAL		1 (16.67%)					1
[INTERNET] Web Site			8 (3.70%)	2 (0.93%)		3 (1.39%)	13
[REFERRAL] FRIEND			6 (5.08%)	7 (5.93%)	1 (0.85%)	1 (0.85%)	15
[TV ADVERTISEMENT] Cable						1 (100.00%)	1
TOTAL	1 (2.04%)	1 (2.04%)	24 (48.98%)	17 (34.69%)	1 (2.04%)	5 (10.20%)	49
Efficiency: Leads converted to Graduates	100.00%		16.33%				
Efficiency: Interviews converted to Graduates							
Efficiency: Enrolled converted to Graduates		100.00%	52.17%	1700.00%	50.00%		
Efficiency: Actual Starts converted to Graduates			55.81%	242.86%	100.00%		

No Shows

Admiss. Rep. Name	UNASSIGNED	[redacted] DEANNA R	[redacted] JORGE G	[redacted], NICHOLAS H	Total
NO MEDIA	1 (0.33%)			14 (4.68%)	15
[BILLBOARD/DISPLAY] Building				3 (4.29%)	3
[BILLBOARD/DISPLAY] SCHOOL SIGN				1 (16.67%)	1
[INTERNET] Web Site		2 (0.93%)		1 (0.46%)	3
[REFERRAL] FRIEND		1 (0.85%)	1 (0.85%)	1 (0.85%)	3
[REFERRAL] Graduate				2 (3.39%)	2
TOTAL	1 (3.70%)	3 (11.11%)	1 (3.70%)	22 (81.48%)	27

Withdrawal

Admiss. Rep. Name	[redacted] DEANNA R	[redacted], KESHA S	[redacted] JORGE G	[redacted] SHEELA N	[redacted] NICHOLAS H	Total
NO MEDIA	4 (1.34%)	1 (0.33%)	1 (0.33%)		2 (0.67%)	8
[INTERNET] Web Site	4 (1.85%)			1 (0.46%)		5
[REFERRAL] Clinical Site	1 (20.00%)					1
[REFERRAL] FRIEND			1 (0.85%)			1
TOTAL	9 (60.00%)	1 (6.67%)	2 (13.33%)	1 (6.67%)	2 (13.33%)	15

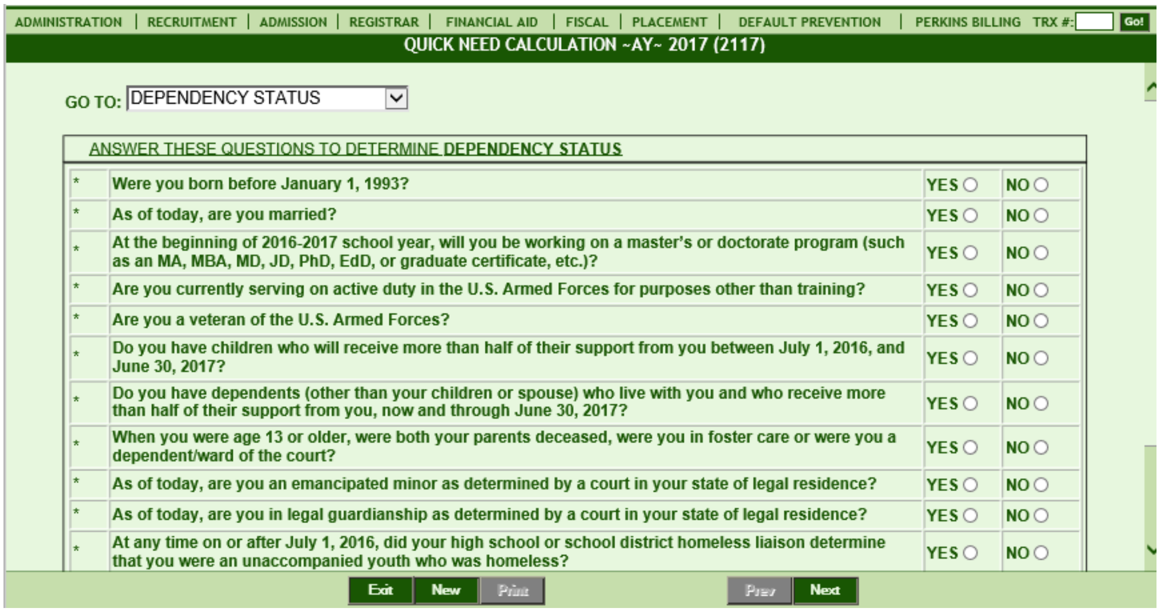
Pass License Exams

Admiss. Rep. Name	Total
TOTAL	0

Placed in Field

Admiss. Rep. Name	UNASSIGNED	[redacted] DEANNA R	[redacted] CLAIRE	[redacted] JORGE G	[redacted] SHEELA N	Total
NO MEDIA	8 (2.53%)	8 (2.53%)		1 (0.32%)		17
[BILLBOARD/DISPLAY] Building	1 (1.41%)					1
[BILLBOARD/DISPLAY] SCHOOL SIGN			1 (14.29%)			1
[INTERNET] Web Site		14 (6.01%)			3 (1.29%)	17
[REFERRAL] FRIEND	2 (1.56%)	4 (3.13%)		1 (0.78%)	3 (2.34%)	10
[REFERRAL] Graduate					1 (1.67%)	1
[REFERRAL] Student					1 (3.45%)	1
[TV ADVERTISEMENT] Cable					1 (50.00%)	1
TOTAL	11 (22.45%)	26 (53.06%)	1 (2.04%)	2 (4.08%)	9 (18.37%)	49

Quick Need Calculations



Module Description

This module enables you to easily and quickly determine an estimated EFC of a lead or student by providing basic information (Name and SS number are NOT required). Compared to the FAFSA module, the FAO can input less data - enough to compute and arrive at an estimate of the EFC. The data entered here can be that of students or leads not yet posted in the system, unlike in FAFSA where the student or lead profile must be created.

Things To Remember:

- Unlike the FAFSA module, data entered here will NOT be saved, but the Results Calculation Page can be printed before exiting.
- Basic information required to compute the EFC: Marital Status, Residence, No. of people in household, No. of people who will be in college, Income data, and Parent's data (if Dependent.)