

REG-Online! Admin

Please remember these important facts when working in the SIS.

The SIS currently enables two menu styles, Classic and Modern. These Manuals are constructed with the Modern Menu in mind. If using Classic, the locations of certain procedures may vary.

REG-Online! Allows families to initially register or update registration records online. No records will be permanent records in your system until you approve and import them.

Set-Up

- **Step 1.** Set School Information Admin»Settings»Set District/School Information

Set School Information

Basic Information

Name: Milestone Academy

CDS code: 19445846013940
(County, District, School)

Attendance District code:

For the purpose of determining In-District students for attendance, use this district code instead.

Address Line 1: 123 Any Street

Address Line 2:

City: Any town

State: CA

Phone 1: 333-555-5555

Fax 1:

Website:

Email:

REG-Online Contact: call 555-555-5555, Mon-Fri 8am-3:30pm or email enrol

If set, this field will replace the Phone 1 field above on REG-Online pages after the text 'For assistance'. For example: 'contact your teacher' will show 'For assistance contact your teacher'.

Timezone: America/Los_Angeles

County: Plumas

Zip Code: 44444

Phone 2:

Fax 2:

School Office Hours: (e.g. "Mon-Fri 8am - 4pm")

Administrator

- The phone number listed on this page will be posted on the public side of the registration window
- Office hours listed on this page will be viewed on the public side of the registration window

- **Step 2.** Set Policies Admin»Settings»Policies

School

Security

Student Portal

Student Registration

1. What SCHOOLYEAR should SHOW on the REGISTRATION FORMS? (Page: effectiveyear) (effectiveyear)

Enter an effective schoolyear. Registration forms will show this schoolyear when displayed before the Cutoff Day policy below. Please use the format as shown below, for example: "2011 - 2012" (Keep in mind the required spacing)

2015 - 2016

2. At what DATE should the REGISTRATION FORM begin DISPLAYING the NEXT SCHOOLYEAR? (Page: newregistration_date) (newregistration_date)

Enter a date for displaying the new registration schoolyear. Registration forms will increment the Effective Schoolyear when displayed on or after this day

All

3. Enable District Level REG-Online? (pubreg_districtlevel)

When enabled - if this school is a district - instead of automatically creating student records within its own scope, an import a child scope can be selected. All REG-Online records and settings will be kept in the district school, while the child scope(s) contain the student records.

All No Yes

4. Next Year Registrations (nextyear_registrations)

Enable the ability to print and display the next schoolyear for registering students when enabled. If a schoolyear has been added that is past the current effective schoolyear - then when printing a students registration you will be prompted to choose which year will be shown on the form. HSLP values will also be adjusted for that year. In addition, REG-Online will have a dropdown for new students to choose which year they are planning to start. If there is not an advanced schoolyear found (For example, if the effective schoolyear becomes the next schoolyear) then this policy will be effectively disabled until another is added.

All No Yes

5. Enable the ORIENTATION SCHEDULER for REG-ONLINE? (Page: pubreg_orientationscheduler) (pubreg_orientationscheduler)

When enabled, timeslots can be created for Orientation meetings.

All No Yes

6. Allow USERS to SELECT the LC they are SIGNING UP for, instead of ONE PER PAGE. (Page: pubreg_orientationchooselc) (pubreg_orientationchooselc)

When disabled, the school will need to give out the exact link for each LC to sign up for. If enabled, the same link is given per LC - as the user chooses which one.

All No Yes

- Choose "Student Registration"
- Review and choose how you want your policies set in this area

Public Registration Administration

- Admin»Public Registration» Admin

- **Header Information:** also available in the Student Info.» Student Registration area and will be discussed again in the Import process below

The screenshot shows the REG-Online software interface. At the top, there are three main sections: Household Statistics, Public Student Statistics, and Public Family member Statistics. Household Statistics shows 0 households with data, 1 empty household, and a total of 11 households. Public Student Statistics shows 7 students missing data, 1 student imported into the SIS, 1 student awaiting import, and a total of 8 students. Public Family member Statistics shows 0 family members missing data, 1 family member imported into the SIS, 2 family members awaiting import, and a total of 3 family members. Below these are sections for Student/Family member Lists, Orientation Scheduler, and Invites/Messages. The Invites/Messages section contains buttons for Start Message, Invite New Message, Invite Returning Message, Invite Household, Missing Data Reminder Message, Update NSLP Reminder Message, Withdraw Message, and Test Message. A configuration section is also visible at the bottom.

- **Invite Messages:** Create messages families will see
 - **Start Message**- body of the email message sent to families when they start the registration process
 - **Invite New Message**- body of the email message sent to a family that you would like to send a personal invitation to and is new to your school. You can use this for a mass email to all your returning families too if they have never used the system before.
 - **Invite Household**- the mechanism used to actually send the emails
 - **NEW**- If you'd like to invite a specific family, click the NEW button. Then enter the email address. New is for families new to REG-online even if the student had been in your school previously.
 - **RETURNING**-If you'd like to invite a specific current family, check off returning button then enter the parent/guardian email addresses and student local IDs. (For directions on how to create this file for upload, see below this section.) Save it in a file or on your desktop. Click choose file and browse for the file. Click Invite.
 - **Reminder Message**- body of email message used to remind parents to start or complete the registration process. When you click the "Send Reminders" button, this message will go out to all families missing data.
 - **Test Message**- If you'd like to see what your messages look like in an email, choose the message type and send yourself an email.

Invite Household

New: Households that have not yet been created in REG-Online will be sent the Start Message Email, along with instructions on creating a household. The household records will be automatically created - and the link in the email will let them create a password to start the process immediately.

Email Type: **Returning:** Households that already registered will be sent the Invite Message, and a link to login. If any emails are found with no matching household login - it will display them as errors.

Single Invite Household

Email address:

(Optional) Specify a Students ID to send the information needed for the household to add students already in the SIS (Re-enroll Current Student).
Students ID:

Mass Invite Households

Alternatively, you can upload a CSV with Email addresses, and each one will be sent an invite email. Each Email should be on its own row.

Example:
test@gmail.com
anothertest@gmail.com
someemail@gmail.com

(Optional) You can also specify Students IDs along with each email to send out. The order should be: "email", student ID on each row. (A comma as the separator)

Example:
test@gmail.com, 29344
anothertest@gmail.com, 23495
someemail@gmail.com, 29955

School Pathways has created a Create-A-Report you can use to invite families to start the re-enroll process. Look for "REG-Online Invite (Parent Email/Student ID)"

Configuration

Below is a list of buttons to choose for configuration

- **Re-Validate All Households**- If required values have been changed, use this button (only at the beginning of REG Online for a new school year)
- **Required Student Values**- Set your student values
- **Required Guardian Values**- Set your guardian values
- **Required Household Values**- Set your household value

Documents, Contacts & Agreements

Set-up Documents

- **Signed Documents**
 - Decisions can be made on this page about enabling certain documents needing signatures
 - How often the documents need to be signed
 - Why each signature is required
 - Which signatures are required and gives you the ability to view the message that is viewed when the parent/guardian are signing
- **Uploaded Documents**

If you'd like to require parents/guardians to upload documents to the REG-Online system:

 - **Step 1.** Choose to Add a New Document Type
 - **Step 2.** Enter new document information and click create a new document
 - **Step 3.** Create New Document and SAVE
 - **Mass Import Households**- Ability to mass import all students in the Re-enroll process. This feature is not available for new enrollments.
 - **Export Student Status Report**- Gives you a report of all students by household that have entered data on students

• Import Process

- **Step 1.** Find the import area Admin»Student Information»Pub Reg. Import
- **Step 2.** Each button allows you to do different processes. Choose the appropriate filters to show the list as you need it displayed

The screenshot shows the 'Showing All Households' page. At the top, there are search fields for Household Last Name, E-mail Address, Student First Name, Household Phone Number, Student Last Name, and Birthdate. Below these are several filter options:

- Household Status: Show All (radio button selected), Empty Households, Withdrawn Households.
- Record Status: With at least one record... (radio button selected), Awaiting Data, Needs Review, Awaiting Import, Already Imported.
- Update Criteria: and updated after: 12/30/2015, with Households starting with: All.

A red box highlights the 'Show Options' dropdown menu, which contains:

- Show any household.
- Show only households with Linked students with no current enrollment record.
- Show only households with Linked students with a current enrollment record.
- Show only households with Unlinked students.

At the bottom, there is a summary table:

Counts		
10 Households	14 Students	12 Family Members
10 Households	13 Students Awaiting Data 0 Students Needing Review 0 Students Awaiting Import 1 Student	3 Unlinked Students 10 Linked Students 0 Unlinked Students 2 Family Members Awaiting Data 0 Linked Students 0 Unlinked Students 2 Family Members Needing Review 0 Linked Students 2 Family Members Awaiting Import 0 Linked Students

Buttons at the bottom include: Back, Pre-Enroll 'Schools', Update List (highlighted with a blue arrow), Merge Two Selected Households, Print Selected Student Registrations, Delete Selected Records, and Unlink Selected Records.

- Show Options-Show all household documents, show student documents, show all student notes, show all passwords, and show deleted records
- Show All- shows all families (households) that have taken part in the REG-Online system will be displayed by family
- Show Awaiting Data-Any families/students with missing data will be listed
- Show awaiting import- If a student's import is green, it's a returning student. If it's yellow, the parent/guardian had noted the student as new to your school
- Show already imported
- Show Empty Households- Those families that have started the process but never entered a student. These are often families who ran into difficulties and may have called you for help. They might also be families that were curious about the process but were hesitant to continue.
- **Step 3.** Click Import:
 - If a new student is in the system, you will be presented with the best matches (on Name and Birthdate).
 - Click a match and then NEXT. If no matches are found, click the Create a New Student Record button. Save the new student record
 - If the student is a returning student, you will be shown the new values that you will be importing. Click SAVE to import the new values
 - The field name is the first column. Make sure all fields are correct and complete by viewing what the parent/guardian has entered (blue column) with what will be imported (right column.) You can change what they have entered by entering data in the right column. Or you can request the family to update the registration
 - When complete click SAVE. This will import the registration record into the SIS. You do not need to save again once the registration view appears but you can change or add extra fields and save again

Students will then be found on the intake roster, unless the student is given an immediate enrollment.

When you are importing a student that is already in your system, you will get more information to check. The Student's Value column shows what is currently in the SIS.

For additional assistance please call us at 866-200-6936.

— Last Updated by [Bailey Higgins](#) on 2016/03/28 18:46

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