

Application Process Automation

Workflows | Connection Requests | Event Registration | Groups



Our Needs

1. Application form for families to apply to our K-12th homeschool co-op
2. Track applicant status
3. View admissions numbers
4. Schedule Meet & Greet
5. Small amount of admin time

Application Form

Workflow + Groups + Connection Requests

1. Family fills out the application using the form option in workflows
2. Workflow finds/creates the parent(s) and student(s)
3. Workflow adds the student(s) to a group based on grade
4. Workflow creates a connection request for the primary parent under “Application Submitted” status
5. Workflow adds an activity with the application form link to the connection request
6. Workflow emails parent a confirmation email with a payment link

Application Payment

Event Registration + Workflow + Connection Requests

1. Family fills out the event registration to pay the application fee
2. Event registration completion triggers a workflow
3. Workflow finds the connection request of the primary parent
4. Workflow adds an activity that a payment is made
5. Event registration sends confirmation email with a link to schedule a Meet & Greet

Schedule Meet & Greet

Event Registration + Workflow + Connection Requests

1. Family chooses a Meet & Greet and fills out the event registration
2. Event registration triggers a workflow
3. Workflow finds the connection request of the primary parent
4. Workflow adds an activity that a Meet & Greet is scheduled
5. Workflow updates the connect request status to “Meet & Greet Scheduled”

Send Enrollment Forms

Connection Requests + Workflows

1. **Staff** triggers a workflow from the connection request once family is approved to send the enrollment form email and update the status to “Enrollment Forms Sent”
2. Family completes enrollment forms using the form workflow action
3. Workflow sends a confirmation email with an enrollment payment link

Enrollment Payment

Event Registration + Workflow + Connection Requests + Groups

1. Family fills out the event registration to pay the enrollment fee
2. Event registration completion triggers a workflow
3. Workflow finds the connection request of the primary parent
4. Workflow adds an activity that a payment is made
5. Workflow makes student(s) Active in the grade group
6. Event registration sends confirmation email with information for ordering uniforms and choosing high school classes

Manual vs Automated

Manual staff actions within process: 1

Automated actions within process: 19

Manual needs after initial set up:

- Creating Meet & Greet instances each month
- Creating High School payment links after enrollment and class selection
- Combining connection requests / activities if both parents took turns in process

Connection Request Board

Connect Classes Students

▼ Opportunities

+ Add Request

All Connectors

⚙ Sort: Last Activity

▼ Filters

🏠 All Campuses

📄 List

Application Submitted0

Meet and Greet Scheduled0

Application Review0

Waitlist0

Enrollment Forms Sent1

Need to Pay Enrollment2

Completed Enrollment Payment93

Closed/Not Enrolling37

Sara Woll

📅 7 - 28d📄 121d

Jennifer Weber

📅 5 - 18d📄 19d

Ebonee Bell

📅 7 - 28d📄 89d

Krysta Graham

📅 11 - 3d📄 127d

Darrin Meacham

📅 12 - 6d📄 183d

Latisha Guinn

📅 11 - 8d📄 213d

Tom Carter

📅 8 - 8d📄 169d

Merissa Valenzuela

📅 3 - 4d📄 17d

Steve Ginder

📅 9 - 28d📄 122d

Nicole Rector

📅 4 - 28d📄 183d


Andrea Murphy

📅 8 - 28d📄 143d

Connection Request Example

Connection Request

Connect Classes StudentsActiveCompleted Enrollment Payment



Jane Smith
Contact Information




Connector

Unassigned

Person Profile

Request Date
6/11/2022 (11 weeks)

Placement Group
None Assigned



Olson Farms

15

VIEW APPLICATION FORM

New Family

#1 Olivea 8th Grade

#2 Roman 1st Grade

#3

#4

#5

#6

#7

Connection Request Attributes

Available Workflows

Send Application Payment Reminder Email from CR

Send Enrollment Form Email from CR

Send M&G Email from CR


Edit

Transfer

View History

Connect

Activities				Add Activity
Date	Activity	Connector	Opportunity	
7/6/2022	Form Enrollment payment completed.		Connect Classes Students	X
7/6/2022	Form Students made Active		Connect Classes Students	X
6/21/2022	Form Enrollment Forms Signed; Payment Link Sent		Connect Classes Students	X
6/20/2022	Emailed Enrollment Form Email Sent	Luisa Jackson	Connect Classes Students	X
6/12/2022	Form Meet and Greet scheduled for Friday, June 17th at 2:00 PM		Connect Classes Students	X
6/11/2022	Form Application payment completed.		Connect Classes Students	X
6/11/2022	Form VIEW APPLICATION FORM New Family #1 Olivea 8th Grade #2 Roman 1st Grade #3 #4 #5 #6 #7		Connect Classes Students	X
6/11/2022	Emailed Payment Link Emailed		Connect Classes Students	X



Workflows List

Application Process

- Application Form for New Families
- Application for Returning Families
- Enrollment Forms
- High School Class Selection

Person Records

- Child Create
- Parent 1 Update
- Parent 2 Create / Update

Connection Request

- Add Application Payment Activity
- Add Enrollment Payment Activity
- Add Meet & Greet Scheduled Activity
- Make Students Active
- Send Enrollment Form Email
- Update State to Connected

Event Registrations

- Application Payment - 1 instance for all families
- Meet & Greet Scheduling - 1 instance per meeting
- Enrollment Fee + K-8th Tuition Payment - 1 instance for all families
- 9th-12th Tuition Payment - 1 instance for each high school student
- Uniform Ordering - 1 instance for all families

Groups

- 2 groups per grade:
 - Upcoming / Enrolled: all students who enrolled - Active Status
 - In Progress:
 - students who are in the pipeline - Pending Status
 - students who chose not to enroll - Inactive Status

Admissions Dashboard

NUMBERS BY GRADE

ELEMENTARY

Kindergarten

Enrolled: 24
Pending Payment: 0
In Progress: 1
Inactive: 7

1st Grade

Enrolled: 19
Pending Payment: 0
In Progress: 2
Inactive: 9

2nd Grade

Enrolled: 19
Pending Payment: 0
In Progress: 1
Inactive: 6

3rd Grade

Enrolled: 12
Pending Payment: 0
In Progress: 2
Inactive: 5

4th Grade

Enrolled: 16
Pending Payment: 0
In Progress: 1
Inactive: 3

5th Grade

Enrolled: 17
Pending Payment: 0
In Progress: 1
Inactive: 3

6th Grade

Enrolled: 18
Pending Payment: 0
In Progress: 4
Inactive: 6

MIDDLE

7th Grade

Enrolled: 15
Pending Payment: 0
In Progress: 1
Inactive: 2

8th Grade

Enrolled: 13
Pending Payment: 0
In Progress: 1
Inactive: 1

HIGH

9th Grade

Enrolled: 3
Pending Payment: 0
In Progress: 1
Inactive: 3

10th Grade

Enrolled: 10
Pending Payment: 0
In Progress: 0
Inactive: 0

11th Grade

Enrolled: 1
Pending Payment: 0
In Progress: 0
Inactive: 1

Totals

Enrolled: 167
Pending Payment: 0
In Progress: 15
Inactive: 44

NUMBERS BY STATUS

APPLICATION SUBMITTED

Total

Children: 0
Families: 0

MEET AND GREET SCHEDULED

Total

Children: 0
Families: 0

APPLICATION REVIEW

Total

Children: 0
Families: 0

WAITLIST

Total

Children: 0
Families: 0

ENROLLMENT FORMS SENT

In Progress

3rd Grade 1
5th Grade 1
7th Grade 1

Total

Children: 3
Families: 1

NEED TO PAY ENROLLMENT

In Progress

4th Grade 1
6th Grade 2

Total

Children: 3
Families: 2

COMPLETED ENROLLMENT PAYMENT

Enrolled

Kindergarten 24
1st Grade 19
2nd Grade 19
3rd Grade 12
4th Grade 16
5th Grade 16
6th Grade 18
7th Grade 15
8th Grade 13
9th Grade 3
10th Grade 10
11th Grade 1

Total

Children: 166
Families: 92

CLOSED/NOT ENROLLING

In Progress

Kindergarten 1
1st Grade 2
2nd Grade 1
3rd Grade 1
6th Grade 2
8th Grade 1

Inactive

Kindergarten 7
1st Grade 9
2nd Grade 6
3rd Grade 5
4th Grade 3
5th Grade 3
6th Grade 4
7th Grade 2
8th Grade 1
9th Grade 3
11th Grade 1

Total

Children: 52
Families: 38



Contact Info

ITOWN Church | Fishers, Indiana

Melissa Drexler

mdrexler@itownchurch.com

@mdrexler on Rocket.Chat

