

# KEY WorkFlows

The workflows describe how the user will interact with PEMS. Workflows integrate functions from multiple modules.

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# New Client On Ramp

|            |                                                                                                                            |
|------------|----------------------------------------------------------------------------------------------------------------------------|
| CRM        | Enter lead into CRM, assign a unique client ID                                                                             |
| CRM        | Sign Contract and invoice                                                                                                  |
| Word Press | Stand up Word Press Site                                                                                                   |
| Word Press | Customize Website content with provided graphics.                                                                          |
| Word Press | Customize forms that go into SIS so they all carry the Unique Client ID                                                    |
| Word Press | Client enters proctor information on their website using the provided form - goes into SIS (like student enrollment form). |
| SIS        | Proctor information information goes into the 'proctor' table as unapproved                                                |
| Moodle     | Once approved, proctor account is created in Moodle                                                                        |
| Word Press | Client enters location information on their website using the provided form -                                              |
| SIS        | Home room location form is entered into homeroom table as 'unapproved'                                                     |
| Word Press | Once approved, then the location is available on the Word Press Site as an enrollment location option.                     |

# New Student Intake

## Intake Steps

Intake represents all the steps required to get a student assigned their first courses in Moodle. In PEMS, the HOMEROOM Module is primary used to complete this workflow. However, communication like sending signed contracts to parents and invoicing clients is completed in the CRM module. The PEMS SIS does not provide any capability to store or send (pdf) documents to and from parents or schools. The CRM is used for this function.

The trigger to start the intake process is a parent submitting an enrollment form (gravity form) on the Word Press site. The completion of the process is the assignment of courses in Moodle.

## Part A - Parent Submits Form and is Accepted/Rejected into the SIS

Part A is triggered when a parent signs up for an account on a client(facility) Word Press website. The submitted enrollment form is reviewed and updated then accepted or rejected. Part A ends with the parent being prompted to pay tuition to the client (facility).

| Sequence | Application | Module        | Description                                                                                                  | TEST PLAN                                                                               | Known Issues                      |
|----------|-------------|---------------|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------|
| 1        | Word Press  |               | <b>USER</b> Parent makes Account on enrollment website, verified by email                                    | Sign up for new account, check email received, verify account, check its verified in WP | Email for new site not configured |
| 2        | Word Press  | gravity forms | <b>USER</b> Parent logs in and completes form on Word Press Site to enroll student                           | Complete gravity form                                                                   |                                   |
| 3        | Word Press  | gravity forms | <b>USER</b> Parent signs all legal forms to submit the forms, for both the enrollment client and Studia Nova |                                                                                         |                                   |
| 4        | SIS         | HOMEROOM      | <b>INTEGRATION</b> - Form is entered into <b>applicants table</b> in the SIS                                 | Check form in SIS                                                                       |                                   |

|     |         |          |                                                                                                                                                      |  |  |
|-----|---------|----------|------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| 5   | SIS     | HOMEROOM | <b>USER</b> reviews the form on the dashboard - clicking the form opens the "applicant record"                                                       |  |  |
| 5.1 | asterix |          | <b>USER</b> to validate all information received in form by <b>calling</b> parent (make mobile phone required)                                       |  |  |
| 5.2 | SIS     | HOMEROOM | <b>USER</b> selects correct previous school ( <b>other school</b> ) in the SIS record. (WP does not have select menu, user types in previous school) |  |  |

|     |           |                           |                                                                                                                                                                                                                                            |                                             |  |
|-----|-----------|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|--|
| 5.3 | SIS & CRM | HOMEROOM&<br>CRM Accounts | <p><b>USER</b> - If other school is not in SIS table, user enters new record and then selects the correct school in the <b>SIS record before accepting the student.</b></p> <p>See <i>Suite CRM Integration.</i></p>                       |                                             |  |
| 5.4 | SIS       | HOMEROOM                  | <p><b>USER</b> selects the correct Homeroom from menu (<i>the parent selects location in the WP gravity form, but the location name in WP may not be exact same as homeroom name, therefore allow the user to select correct name</i>)</p> |                                             |  |
| 6   | SIS       | HOMEROOM                  | <p><b>USER</b> - Accept / reject the Student</p>                                                                                                                                                                                           | Check WP status is approved or disapproved. |  |
| 7   | SIS       | STUDENT                   | <p><b>AUTOMATION</b> - create the student record in SIS from the applicant record.</p>                                                                                                                                                     |                                             |  |

|    |            |                    |                                                                                                                                                                                    |  |  |
|----|------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| 8  | SIS        | STUDENT            | <b>AUTOMATION</b> - create all the student term records needed for the student until the end of their current grade span. <b>3.</b><br><a href="#">Create Student Term Records</a> |  |  |
| 9  | Word Press |                    | <b>INTEGRATION</b> - Parent is notified student is accepted, status is changed in the Parent's WP account.                                                                         |  |  |
| 10 | Word Press | PayPal integration | <b>USER</b> Parent is able to pay with paypal the <u>client</u> (facility account).                                                                                                |  |  |

## Part B - Gather Required Documents from Parents or Other Schools - Mainly CRM functions

Trigger - a new opportunity record is made in Suite when the student is accepted in the SIS. This function alerts the CRM user to start getting the required documentation from parents and schools to support the enrollment. Suite is also used to send invoices to the client(facility), ensuring that every students is billed for. Part B ends with a status change to the student record that allows the student to be provided log-ins to Moodle.

| Sequence | Application | Module | Description                                                                                                                                                                                     | TEST PLAN | Known Issues |
|----------|-------------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|--------------|
| 1        | CRM         |        | <b>INTEGRATION</b> - When the student is accepted, Suite CRM records are created. The parent is a contact record the student is an opportunity .<br>See <a href="#">Suite CRM Integration</a> . |           |              |

|   |                                                |                   |                                                                                                                                                                                                                                     |  |  |
|---|------------------------------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| 2 | CRM<br><i>add \$\$ sig<br/>module to SUITE</i> | (no dev required) | <b>USER</b> sends Parent an e-sign document to dis enroll student from previous school and enroll in Studia Nova ( <i>contract pdf template in Suite</i> )                                                                          |  |  |
| 3 | CRM                                            | (no dev required) | <b>USER</b> Once above document is signed, an invoice is sent to the <u>client</u> (facility account) for the new student, and/or notification based on billing terms.                                                              |  |  |
| 4 | CRM                                            | (no dev required) | After the parent esigns the document request, the pdf is emailed to the other school to request transcripts.                                                                                                                        |  |  |
| 5 | SIS                                            | STUDENT           | <b>USER</b> (or future <b>INTEGRATION</b> ) updates the student record as active.                                                                                                                                                   |  |  |
| 6 | SIS                                            | HOMEROOM          | <b>USER</b> creates student logins                                                                                                                                                                                                  |  |  |
| 7 | Word Press                                     |                   | <b>INTEGRATION</b> - Update word press site with student logins so that they may be provided to the <u>proctor</u> who provides them to the student.<br><br>Also make the logins known to the parent account in the wordpress site. |  |  |

|   |     |  |                                                                                                                                                           |  |  |
|---|-----|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| 8 | SIS |  | <b>AUTOMATION</b> - Auto-assign the first course that provides students directions on how to use Moodle, and have them complete their initial assessment. |  |  |
|---|-----|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|

## PART C - Assessment and Course Assignment

Part C intakes the student's initial academic assessment scores and allows the admin user to select the correct program of study based on the student's assessment scores.

| Sequence | Application        | Module | Description                                                                                                                                                               | TEST PLAN | Known Issues |
|----------|--------------------|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|--------------|
| 1        | Moodle or other??? |        | Students use the Edwiser in Moodle from to self-enter their scores from IXL. Use the Edwiser activity. Or there may be another way to do this. Make the proctor do this?? |           |              |
| 2        | SIS                |        | <b>USER</b> - Admin reviews assessment data, makes determination on which program to assign.                                                                              |           |              |
| 3        | SIS                |        | <b>AUTOMATION</b> - Based on the assigned program, SIS automatically creates the student's enrollments.                                                                   |           |              |

|   |     |  |                                                                                                              |  |  |
|---|-----|--|--------------------------------------------------------------------------------------------------------------|--|--|
| 4 | SIS |  | <b>INTEGRATION -</b><br>After review of enrollments, the admin triggers the enrollments in courses in Moodle |  |  |
|---|-----|--|--------------------------------------------------------------------------------------------------------------|--|--|

## Student Intake UI

### PART A - Applicant record to Student Record

student lead 1

E

student lead 2..

E

student field

student field

student field

Location from Word Press Site

Select Homeroom

+

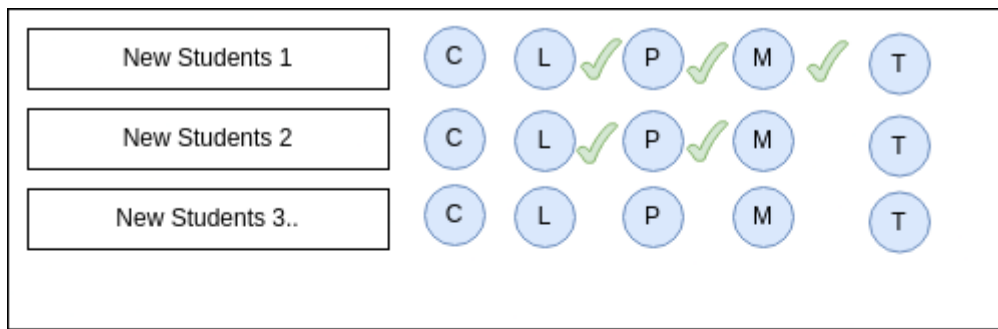
Previous School text fields

Select Previous School (other schools)

+

ACCEPT STUDENT

### PART B & C - Enroll Student in Courses



C

Opens the suite CRM Opportunity Record so the user can send out the PDF records request.

**PART B**

L

Log-in creation page - create student logins then automatically update Word Press Site.

P

Assign program page and edit enrollments

M

Show related enrollment records and allow user to batch enroll in Moodle. Show that the process was completed.

T

Once the previous school sends the transcripts, update the student credits. After this step is complete, there are not more student intake steps.

### **PART C VIEW P - Assign program:**

Show:

- Student Name, grade level, first student term name

- Assessment data history:

Select:

- Program of Study [ *programs menu* ]

*based on the selected program, list template records below:*

|                         |                   |                                                   |                    |
|-------------------------|-------------------|---------------------------------------------------|--------------------|
| term 1 - grade x term x | button            | <no student term found>                           |                    |
| template 1              | <i>enroll&gt;</i> | <i>create enrollment record based on template</i> | <i>delete/edit</i> |
| template 2              | <i>enroll&gt;</i> |                                                   |                    |
| template 3..            | <i>enroll&gt;</i> |                                                   |                    |
| term 2 grade x term x   |                   | student term 1                                    |                    |
| template 1              | <i>enroll&gt;</i> |                                                   |                    |
| template 2              | <i>enroll&gt;</i> |                                                   |                    |
| template 3..            | <i>enroll&gt;</i> |                                                   |                    |
| term 2 grade x term x   |                   | student term 2                                    |                    |
| template 1              | <i>enroll&gt;</i> |                                                   |                    |
| template 2              | <i>enroll&gt;</i> |                                                   |                    |
| template 3..            | <i>enroll&gt;</i> |                                                   |                    |
|                         |                   |                                                   |                    |

### **SAVE PROGRAM**

- When the user changes the program, change the list on the left side.
- If the user makes enrollment records, then changes the program, always show all enrollment records made on the left side
- Allow the user to delete/edit the enrollment record.

### **PART B View M - Moodle Enrollment UI - per Student View**

Student Name

Select Term

Enroll All

Enrollment 1

M



Enrollment 2

M

Enrollment 3

M

- User can click each M button to enroll the student in the courses in Moodle, or the user can enroll on in a batch process.

**PART B View M - Moodle Enrollment UI - All Students View**

Show same as above but all student enrollments for current term

**T - Enter Transcript -TBD**

# Advancement

# **Adjust Program of Study**

# **Student Close Out**