# Welcome to OpenApply



Thank you for signing up with OpenApply! We hope you find it effective as your paperless admissions office.

Please find enclosed our QuickStart guides to help you make full use of OpenApply.

Yours sincerely,

The Open Apply Team

At Faria Systems Inc.

## Up and running in one week!



Send us your forms



We set up your account within 48 hours



Configure Settings & Payment



Your admissions office is paperless!



Contact Us!

We are available 24 hours a day, Monday to Friday. Website: http://openapply.com

+1 866 297 7022

+44 208 133 7489

Email: support@openapply.com

+852 8175 8152

+61 2 8006 2335

Integrated Information Systems for International Education

# **Getting Started**

## Who's involved in setting up OpenApply?

Admissions staff are the primary users of OpenApply. During the setup, the Admissions team will want to ensure that all key forms are organised correctly and that the Admissions settings are configured with year levels, enrolment, admissions checklists and tour preferences set.

We recommend reviewing the **Build Forms**, **Configure Settings**, **Admissions Cycle** and **Re-enrolment** guides.

**Academic staff** may be given access to OpenApply to review applications and to participate in admissions decisions.

We recommend reviewing the Admissions Cycle and Re-enrolment guides.

**Technology staff** are responsible for setup, linking to OpenApply from the main school web page, provisioning access to OpenApply, preparing the Excel import file for adding currently enroled students, and integration with the school's student information system. We can also assist you in syncing OpenApply with ManageBac and iSAMS.

We recommend reviewing the **Configure Settings**, **Enable Online Payments** guides and **FAQs**.

**Billing & Finance** are responsible for defining invoice settings and enabling online payment.

We recommend reviewing the Enable Online Payments guide and FAQs.

## **Checklist of Items**

Key items to have ready at hand:

#### Forms

- Application for Admission
- Supplementary
- 🥝 Re-enrolment
- Registration of Interest / Enquiry
- Questionnaire & Recommendation

## Admissions

- Enrolment Capacity
- Campuses
- Status & Notifications
- Applicant Checklist
- 7 Tours

### **Payments & Invoicing**

- Payment Methods
- Invoice Options

## **Re-Enrolment**

Oeadlines

# **Build Forms**



## Send us your Forms The recommended way

Simply e-mail your admissions and enrolment forms to support@openapply.com. We will build them for you within 48 hours, usually less.

**Time Required** 15 - 20 minutes Who's involved? Admissions Office

Once your forms have been built, you can still easily make changes or add new fields with our form editor.

OpenApply 🖷 Op	enApply - Demo Account				Ompuse	Here & Sugar
Drag to Add a Field		Form Editor			Back to Forms Save Changes	Preview
Fuids Settings		Title *		Tag		
		No-Enrolment Form				
Control Navigation		Eruble payment O	Confirm without payment			
# Applicant		Ves No	O Wes			
Name	Тури	Fee				
Absent Days	Single-line Test	\$ 550.00				
Address.	Multi-line Text.					
Address (2)	Multi-line Text.					
Applicant Lives With *	Multiple Choice					
Applied Before	Multiple Choice	Erabled Arnder form in 2 columns				
Campus *	Dropdown Menu	Description				•
City of Birth *	Single-line Text	Please confirm your enrollment for the 2016-	2017 academic year and ensure	that your contact details are up	to date.	

# What type of forms are supported in OpenApply?

## **Application for Admission**

Application forms are used by new families to apply to your school. They will collect basic demographic and academic information for the applicant and family. An online payment option additionally simplifies the process.

## **Supplementary**

Supplementary forms are used to collect health, extracurricular activities and other information about the applicant.

## **Re-enrolment**

Re-enrolment forms are used to confirm re-enrolment for the upcoming academic year and can be used to ensure that each family's contact details are accurate and up-to-date.

## **Registration of Interest / Enquiry**

Enquiry forms are used by new families to express interest in applying to your school. They are more concise and allow the family to provide their contact information and proposed grade of entry.

#### Tour

Tour forms are used to collect information about families prior to their school tour.

## Questionnaire

Questionnaire forms efficiently and securely collect teacher and personal recommendations online.

# **Best Practices**



**OpenApply is built on the single source of truth principle.** This means that information entered across various stages of the admissions process remains up-to-date, accurate and in sync at all times. Together with built-in form validation, this provides a robust defense against bad data and ensures a sound database. By allowing families and staff to easily update information via any form, you can avoid versioning headaches.

What do we mean? The best example is when families complete re-enrolment, all their historical information is pre-filled in and any updates or changes flow back into the main student profile, so instead of having to complete the form from scratch, they can simply update and confirm.

# What types of fields are supported on OpenApply?

**Single-line Text** is for simple questions requiring one- or two-word answers.

**Multi-line Text** is for more complex questions requiring longer answers.

**Dropdown Menu** is for selecting from a long list of values, such as selecting your country, language, etc.

**Checkboxes** are for questions that require multiple answers, such as languages spoken.

**Multiple Choice** is for questions with one defined answer.

**Grouped Fields** are for complex tables, such as prior school lists or immunisation histories.

**File Upload** is for collecting school reports or allowing parents to upload Word or PDF documents.

**Date** is for indicating dates such as the school enrolment date.

**Year** is used to collect a specific year i.e. 1999 between a defined range (e.g. 1990 to 2010).

URL is used to collect a web address.

E-mail Address is used to collect a valid e-mail.

Number is used to collect a valid integer.

**Decimal Number** is used to collect a more precise value.

**Terms & Conditions** are used to certify acceptance of terms upon submission of each form.

**Signature** is used to collect the e-signature of the parent or applicant upon submission of each form.

# **Configuring Settings**



# **Configure Settings**

**Time Required** 30 - 60 minutes

## Who's involved?

Admissions, Technology & Billing Offices

## **Programmes & Enrolment Capacity**

Define your academic programmes (e.g. IB Diploma, IGCSE, AP, High School, Middle School) and your enrolment capacity i.e. the number of places available in each grade level.

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Prog	ramme	Campuses	Status & Notification	Tours	Open Days	Checklist	Re-Enrolment	Task Types				
Prog	ramm								Years format:	O US system	O UK syst	em
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									Capacity			+
									Capacity			+
	P	re-Kā							Capacity	20	8	+
	K K	indergarten							Capacky	20	8	+
		rade 1							Capacky	20	\$	+
		rade 2										

## Campuses

Indicate any additional campuses. This will be used to organise your admissions and programmes by campus. For example, you can indicate that the **West campus** is for secondary school, whereas the **East campus** is for primary and middle schools.

## **Status & Notifications**

Customise the status levels (e.g. Pending, Applied, Accepted, Waitlisted, etc.) and enable automated e-mail notifications, which will send personalised e-mails to families when a new status level has been set. For example when an applicant is marked as **Accepted**, they will be sent a personalised e-mail based on your template.



Programme Ca	mpuses Status & Notification	Tours Open Days O	heckist Re-Enrolment	Task Types	
mail notifications alg	grment: 🚬 🗐				
atus	Туре	Applicant Messag	je Familj	Message	
S Pending	Pending			•	dd Status Leve
C Applied	Applied				dd Status Leve
S Admitted	Admitted				dd Status Leve
5 Walt listed	Wait-listed				dd Status Leve
3 Declined	Declined			•	dd Status Leve
S Enrolled	Enrolled				dd Status Leve
				m (1)	

## **Tours**

Enable families to schedule visits directly online within a defined range of days and hours (e.g. Mon, Wed & Fri between 8:00 am and 3:30 pm). Share your Open House and orientation days and allow parents to RSVP online.

Below the Tour options, you can also indicate holidays and days when family tours will not be offered. Simply click the date of the month that you would like to skip.

## **Admissions Checklist**

Define your admissions process and requirements by programme. When creating an admissions checklist, you can choose from **four** requirement types:

- **To-Do** allow you to specify tasks, e.g. Taking the SSATs.
- Document Submission allows you to collect documents that families can securely upload, e.g. school reports or transcripts.
- Tours & Forms allow you to require tours or completion of forms.
- Interviews allow you to schedule an interview date & time with a family.



With our drag-and-drop export templates, you can select the fields you want to include in your export, and also save the template for further use.

Programme Car	трына	Satus & Notification	Tours	Open Days	Checkist	Re-Enrolment	Task Types	
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Primary Middle	Seco	ndary						
When are tours availab	ble?							
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Tuesday								
Wiednesday	70	0 am - 8:00 am 🗢		+ Add Ho	urs	× Sharon Aan	se	

rogramme	Campuses Status & Notification Tours Open Da	ys Checklist Re-Enrollment Task Types		F.
rimary M	liddie Secondary			
Title & Re	equirements	Applicable Statuses		
Sched	dule Tour Visit 🛛 👄 Requires Tour	Punding Applied Administ Walching Declined	G	1
RSVP	for Open House Day - Requires Open Day	Pending Applied Admitted Wait-loted Declared	G	
Subm	it Registration of Interest Acquires Form	Punding Applied Admitted Walkford Deckned	G	
Comp	elete Prior School Questionnaire + Requires Form	Finding Applied Administ Wat-listed Declined	G	
Subm	It School Records  + Requires Document Submission	Prodieg Applied Admined Wak-listed Deckned	Ci	
Subm	it Application 🔶 Requires Form	Punding Applied Administ Wait-listed Deckned	G	
Sched	dule interview  + Requires Interview	Peopleg Applied Admitted Walcasted Declared	G	
Healt	h Form -+ Requires Form	Punding Applied	G	

Export Import Recent Imports			
Export student records from: Applicat	ion for Admission	~	
Status			All   None
Pending 🔽 Applied 🔽 Admitted	Walt-listed Declined	🛿 🔽 Enrolled 💟 Graduated 💟 With	hdrawn
Programme			All   None
🗸 Primary 🔽 Middle 🔽 Seconda	irv		
Export Archived Student			
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Export Archived Student Yes No Export Template Application for Admission			
Sport Archived Student Yes No Doport Template Application for Admission	-		
Sport Archived Student Yes No Doport Templace Application for Admission Application for Admission	Select Al	III Export Fields	Unselect All
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Opport Archived Student       Yes     No       Opport Template       Application for Admission       Sport Fields       Availlable Fields       Application       Torm with payments	Select AI	III Export Fields Applicant ID Student Satus	Unselect All

# **Enable Payments**



## **Enable Payments**

Easily collect application and re-enrolment fees online. Generate invoices, perform reconciliation, and send automated invoice reminders & receipts.

**Time Required** 1 hour to 1 week Who's involved? Billing & Finance Office

## **Configure Payment & Invoice Settings**

Define your invoice preferences, billing currency and payment methods:



Payments		
General Invoices	Notifications	
Payments & Invoicir	enabled	Generate PDF Invoice Preview
Payment me	thods	
Cash	Default *	Cash instructions:
Check		Payment instructions:
		A check is a document that orders a payment of money from a bank account. The person writing the cheque, the drawer, usually has a current account (most English
(mmmm)		

## **Setup Your Payment Account**

In order to accept credit card payments online, you will need to setup an online payment account with any of the following providers:

		USD	EUR	GBP	HKD	AUD	CAD	SGD
stripe	http://stripe.com	$\checkmark$	$\checkmark$	<b>√</b>	<b>√</b>	$\checkmark$	$\checkmark$	
Braintree	http://braintreepayments.com	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	<b>√</b>
PayPal	http://paypal.com	$\checkmark$	$\checkmark$	<b>√</b>	<b>√</b>	$\checkmark$	$\checkmark$	$\checkmark$
CyberSource*	http://cybersource.com	$\checkmark$						
hosted <b>PCI</b>	http://hostedpci.com	$\checkmark$						

**And others:** Authorize.Net, Chase Paymentech, Planet Payment / iPay, WorldPay (XML Direct), Moneris, Network Merchants (NMI), SecureNet, Star Card, PSI Gate, Optimal Payments, Global Collect, Beanstream, AITS, Redecard (Brazil), Firstdata, Vitalpay

# **Manage Payments**



# Via the Applicant Profile



## **Generate Invoices**

Set the issue date and payment amount to generate an individual invoice. Optionally send the invoice via e-mail.

## **Reconcile Payment**

Mark the payment method (e.g. bank transfer), payment amount and date of payment to reconcile the invoice.

## **Send Receipt**

Once an invoice has been reconciled, you can e-mail a PDF receipt in one click.

# **Manage Admissions**

# **The Admissions Process**



application.

Applied

as The applicant rest has submitted their application with all required documents.



The Admissions team has extended an offer of acceptance to the applicant.



The Admissions team has wait-listed the applicant.



The Admissions

team has declined

to offer a place to

the applicant.

🕗 Enrolled

The applicant has accepted the offer and confirmed their enrolment.



Once you have reached an admissions decision after reviewing an applicant profile, you can mark their admissions status.

- Only admissions staff with admit & enrol permissions can adjust the status.
- There is also a 30-second delay in sending e-mail notifications, so if you have marked the status incorrectly, you can press *Undo* on the Applicant History to reverse your decision.



# **Applicant Dashboard**

The applicant dashboard enables parents to track their admissions status and communication with the school in real-time. When families securely login to OpenApply after submitting their application, they can view their previously submitted application, the admissions status history, their application checklist with completed and pending items, and any outstanding or paid invoices.



# **Applicant Profile**





# **Start Admissions**

**Congratulations! Now that you have set up your OpenApply account, you are ready to go live.** Review your application forms once more for accuracy, invite your colleagues and link to OpenApply from your main school website.

Time Required	Wh
1 hour	Adr

/ho's involved?

Admissions and Technology Offices

## **Review Forms for Accuracy**

Double-check to ensure that all required fields have been added to your forms. Review your application checklist one more time to ensure that it meets your requirements.

Pro Pri	gramme Campuses Status & Notification Tours Open Days Checklist mary Middle Secondary	Re-Enrollment Task Types		
	Title & Requirements	Applicable Statuses		
•	Schedule Tour Visit	Pending Applied Admitted Wait-listed Declined	G	Û
ŀ	✓ RSVP for Open House Day → Requires Open Day	Pending Applied Admitted Wait-listed Declined	G	8
þ	Submit Registration of Interest → Requires Form	Pending Applied Admitted Wait-listed Declined	G	8
	Complete Prior School Questionnaire 🚽 Requires Form	Pending Applied Admitted Wait-Isted Declined	G	Ô
ł	Submit School Records ARequires Document Submission	Pending Applied Admitted Wait-listed Declined	G	Ô
ŀ	Submit Application → Requires Form	Pending Applied Admitted Wait-listed Declined	G	8
	Schedule Interview	Pending Applied Admitted Wait-Ested Declined	G	8
	Health Form   Requires Form	Pending Applied	G	8

## **Invite Colleagues**

Create additional staff accounts for your school admissions, technology & business offices. Permission levels allow different tiers of access.

Staff Directory				WHAT CAN ADMINS DO BEYOND REGULAR
All Departments Re	ad-only Academics Finance	Technology Adm	issions	USERS? Admins can do everything that regular
All Departments			Manage Departments Add New User	users can do, plus they can add new users to the system and change your school's account settings.
Name	Title	Department	Last Login	HOW CAN I RE-SEND WELCOME EMAILS OR
Sharon Aarese	Admissions Director	Admissions	Sep 06, 2015 at 11:18pm	You can click Re-send welcome email
Victor White	Finance Director	Admissions	Sep 07, 2015 at 8:54am	besides the user's name to resend the welcome email to your colleague. This will
Cristina Kreuger	Technology Director	Admissions	Jan 20, 2016 at 7:00pm	allowing them to get started by configuring their password.
Richard Chandler	Academic Director	Academics	Sep 03, 2015 at 9:40pm	

## Link your Admissions Website to OpenApply

Embed the OpenApply button on your school website homepage and create an easy link to your application forms. Choose from three OpenApply button styles: portrait, landscape and banner.



# **The Re-Enrolment Process**

## **Configure Re-enrolment Forms**

You can customise your re-enrolment form via the Forms Editor and also define your re-enrolment fee. Form fields are automatically coded, so that any existing information (e.g. home address) will be pre-filled and seamlessly updated when parents confirm re-enrolment.

# Drag to Add a Field Term Editor Term Editor In the Samage International Samage International Samage In the Samage International Samage In the Samage International Samage Internati

## **Define Re-enrolment Settings**

Set your re-enrolment deadline to a fixed date (e.g. Mar 15) and customise your re-enrolment notification e-mail template.

Admissions Preferences		
Programme Campuses Status & Notification Tours	Open Days Checklist Re-Dynalment Task Ty	200
Re-Enrollment Preferences		
Inable Re-Enrolment O Erection	Deadline: Mar 01, 2016	=
		Sive Dunges

## Send Re-enrolment Forms

Once you are ready to open re-enrolment for parents, you can bulk send re-enrolment e-mails to all families whose children are set to the Enroled status. (Note: applicants & families that have just been accepted in your current admissions period will not receive re-enrolment notifications)







Clicking the re-enrolment link will securely log parents in to the re-enrolment form. The re-enrolment form is pre-filled with existing family information.



Upon submission, family information is updated automatically on the applicant profile.



# **Re-enrolment Dashboard**

The re-enrolment dashboard enables you to monitor overall re-enrolment in real-time and to bulk confirm re-enrolment for many students at once. You can easily filter re-enrolment by program or grade level to see the status of a particular cohort, or bulk re-send re-enrolment notifications via e-mail.



## General

## What is OpenApply?

OpenApply simplifies the admissions process for families and schools by providing a convenient alternative to paper forms, and by providing an integrated system to support the internal admissions process from first inquiry to enrolment.

#### How much does OpenApply cost?

OpenApply is free for applicants & families, but it is provided as an annual subscription service to schools.

## What do I need to use OpenApply?

OpenApply is a web-based application that is hosted on our servers. All you need is an internet connection and a modern web browser with JavaScript enabled.

We recommend using Google Chrome for the best experience, but Safari 5, Internet Explorer 9 or Firefox 12 all work fine on Macs & PCs.

## Who is behind OpenApply?

OpenApply is a service provided by Faria Systems Inc. We design integrated information systems for international education to support schools for the future and to eliminate paperwork.

## Setup

## What do I need to get setup?

Setting up OpenApply is quick and easy. All you need is a copy of your existing application forms in Word or PDF format.

After signing up, we build in your application forms within 48 hours and work with you to configure your school's account, so that the admissions process reflects your school's requirements.

#### How do I sign up for OpenApply?

You can sign up directly at http://openapply.com. You can also call us at +1 866 297 7022 or +852 8175 8152.

## **Support & Training**

## Where can I get help if I have a question?

You can visit our Online Support Center to browse our Help tutorials. You can also e-mail us or call us at +1 866 297 7022 or +852 8175 8152 any time. We take great pride in providing responsive, friendly and helpful support.

## What kind of support do you offer?

We provide support by e-mail and telephone. We are available 24 hours a day, Monday to Friday. We also provide free one-on-one online training sessions for your Admissions team during the setup phase to help them get acquainted with OpenApply and to walk through all key parts of the system.

## **Technical**

## Where is OpenApply hosted?

OpenApply is hosted in the cloud at the iWeb Montreal data center.

## How secure is OpenApply?

Prospective applicants & families can visit your Admissions page, but in order to submit an application, they must first create an account by providing their e-mail address and setting a password.

By default, all application forms use 256-bit SSL encryption to ensure that data is encrypted during submission to your school.

The OpenApply admissions panel is a password-protected system. It is not publicly accessible and access is restricted to your school admissions team.

#### Are my files backed up?

Yes, files are backed up in real-time on redundant RAID storage locally, and disk images are backed up daily at the data center. Records are also encrypted, and backed up off-site at a separate facility three times each week.

#### Can I export my information from OpenApply?

You can export applicant and family information in PDF, Excel or CSV format. All information stored on OpenApply is exportable.



# The Paperless Admissions Office



## A service of



**Integrated Information Systems** for International Education

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The Faria Education Group is a leader in international education systems & services.





