

# Online Admissions and Online Reenrollment Guide

3/22/2016 Online Campus Community 7.0 Online Admissions and Online Reenrollment US

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Online Admissions and Online Reenrollment-2016

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# Forms

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With *Forms*, you can create and manage online forms to collect information from website users. When you create forms, you use the Form Designer to create distinct steps and sections, insert instructional text and images, and insert fields to collect data from website users. The available field types include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to users who enter email addresses. These fields on the Common form type do not map to a database outside the program.

The Online Admissions and Online Reenrollment form types allow you to map forms to a database outside the program. On the Form Designer, you can add fields that map to corresponding fields in The Education Edge. This allows you to accept applications online and create and update records in the Admissions Office section of The Education Edge.

**Note:** The Online Reenrollment form type is only available to students who were added to The Education Edge as applicants. If you add a student to the system as a student and no applicant record exists, then the student cannot reenroll on the Online Reenrollment form.

After you design a form, you use a Form Display part to create a landing page on the website. In *Parts*, you create a Form Display part and select the forms to include on the web page. On the website, users view the available forms, and they can click links to start, resume, delete, or print the forms.

**Warning:** To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

For Online Admissions forms, you can also include a link to allow users to review checklist items for their forms.

After you place forms on your website, you manage them in *Forms*. With the Form Designer, you can adjust the forms as necessary, and on the Data tab, you can view summary information about the forms and manage the data that website users submit. After users start form, you can use the Data tab to create PDFs with their data and delete form entries.

For Online Admissions and Online Reenrollment forms, you can also resubmit form data to the Online Admissions and Online Reenrollment Plug-in.

## Online Forms: Process Overview

To create online forms and place them on your website, you must perform several steps in different areas of the program. For Common forms, the fields do not map to another database and the data that website users submit remains in the program.

The Online Admissions and Online Reenrollment form types allow you to map the data that website users submit to The Education Edge. After you install *Online Admissions*, you can create forms with pre-mapped fields that allow you to create and update records in the Admissions Office section of The Education Edge.

**Note:** To install *Online Admissions*, you must select the appropriate options when you install or update Blackbaud NetCommunity. For information about the installation, see the *Infinity Platform Installation and Upgrade Guide*.

### Step 1

To allow users to create and manage online forms, you must provide security rights. To do this, you add the desired form-related rights to a task group. In *Security Assignments*, you then associate the task group with a role or an individual user. In the task group, you can provide users with full supervisor rights in *Forms*, rights to create forms but not edit or delete other users' forms, view-only rights, or limited view-only rights for the form data that website users submit. For more information about security rights, see the *Users & Security Guide*.

### Step 2

To create an online form, go to *Forms* and click **New form**. If you do not want to create a form from scratch, you can copy an existing form, create a form based on a sample in the Samples tab, or import

an XML form. When you create the form, enter a name and select a form type to determine the available elements. The Common form type is available to all users and includes presentation elements and field elements that are available on all forms. The data you collect with Common forms does not map to another database.

**Tip:** When you host multiple sites, you can create forms for individual sites. To do this, log in to the site and create the form. For more information, see the *Administration Guide*.

**Note:** For *Online Admissions*, the Online Admissions and Online Reenrollment form types include mapped fields that allow you to create or update records in The Education Edge.

### Step 3

After you create a form, use the Form Designer's Form builder tab to select the elements to include. To place elements on the form, select them under **Available elements** and drag and drop them to **Selected elements**. To edit properties for an element, place the cursor over the element and click **Edit**. With presentation elements, you can organize the form into steps and sections and add images and instructional text. Each form must include at least one step and one section. With field elements, you can place fields on the form to collect data. Common fields available on all forms include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to the email addresses that users enter.

**Note:** With the Online Admissions and Reenrollment form types, you can include fields that map to The Education Edge. On the Form Designer, you add pre-mapped field sets and then select the fields to include on the form.

### Step 4

After you design the form on the Form builder tab, use the Form Designer's other tabs to enter settings for the form. For information about the Form Designer, see [Design Forms on page 9](#).

- On the Language tab, you can rename labels, headings, and other text for the form.
- On the Properties tab, you can change the form name and description. You can also suspend the form to allow website users to view their statuses but not start or submit forms.
- On the Targeting & security tab, you set the view rights to target the form to specific users.
- On the Login tab, select whether to require users to log in to access the form. You can also select whether to allow users to save and delete forms, and whether to create sign-up transactions in The Raiser's Edge for users who register for your site through the form.

For the Online Admissions and Online Reenrollment form types, you must require users to log in.

- On the Payment tab, select whether to charge a fee when users submit the form.
- On the Submit settings tab, select whether to use the default confirmation screen when users submit forms or to design your own. Click **Acknowledgement email** to design the email message to send to users to confirm receipt of their form data.

**Tip:** In the form, the email address field is used to send the acknowledgement only if the user is not logged in. If the user is logged in, the acknowledgment email is sent to the email address associated with the login profile account.



- For the Online Admissions form type, on the Checklist status tab, enter settings for the checklist items associated with the form.

### Step 5

After you complete the form, you can place it on your website. To do this, you create a Form Display part in *Parts* and select the forms to include on the part. When you place the part on a web page, it acts as a landing page for users to access your online forms. On this page, a list of available forms appears, and after website users start forms, they can view the statuses and resume, delete, and print forms. On the Form Display part, you also enter login settings for users who access the page. For more information about the Form Display part, see the *Parts Guide*.

### Step 6

After you place the Form Display part on the website, you return to *Forms* to manage forms. On the Data tab, you can view summary information about forms and manage the data that website users submit. On the Summary tab, the grid displays the number of forms started and completed for each form on the website. On the Detail tab, you can edit the data that website users enter on the forms. For more information about the Data tab, see [Manage Data from Online Forms on page 25](#).

## Design Forms

When you create online forms for your website, you use the Form Designer to include presentation elements and field elements. Presentation elements include steps, sections, images, and text. Forms are organized into steps and sections, and each form requires at least one step and section before you can add other elements. Field elements include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to the email addresses that users enter. These fields do not map to a database outside of the program. When you add multiple steps to a form, website users page through the form from one step to the next. If you charge a fee for users to submit the form, the payment information appears as an additional step.

In addition to presentation elements and field elements that are available on all forms, the Online Admissions and Online Reenrollment form types allow you to add pre-mapped field sets that map to corresponding fields in The Education Edge. With these form types, you can accept applications online and map the data that users submit to The Education Edge. After you add a field set to an Online Admissions or Online Reenrollment form, it appears under **Available elements** and you can add its fields to the form.

After you complete a form, you use a Form Display part to place it on the website. On the web page with the part, website users can access all forms that you include on the part. From the web page, users can start forms, view their statuses, and resume, delete, and print forms.

For Online Admissions forms, you can also allow users to review checklist items.

For more information about the Form Display part, see the *Parts Guide*.

After you place the Form Display part on the website, you return to *Forms* to manage your forms. You can use the Form Designer to adjust the forms as necessary, and on the Data tab, you can view summary information about the forms and manage the data that website users submit. On this tab, you can view overall statistics for each form and access the data that website users enter on the forms. You can also create PDFs with user data.

For Online Admissions and Online Reenrollment forms, you can also resubmit form data to the Online Admissions and Online Reenrollment Plug-in.

For more information about the Data tab, see [Manage Data from Online Forms on page 25](#).

### > Create a form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. Click **New form**. The Form Designer appears.

If you do not want to create a form from scratch, you can copy a form or use a sample as a starting point.

- To copy a form, locate it in the *Forms* gallery and click **Click here to copy this form**. On the Copy Form screen, enter a name, select a folder, and click **Next**. The Form Designer appears, and you can edit the form as necessary.
- To copy a sample form, locate it on the Samples tab and click **Click here to copy this sample**. On the screen that appears, enter a name, select a folder, and click **Next**. The Form Designer appears, and you can edit the form as necessary. For information about samples, see [Sample Forms on page 24](#).
- If you previously exported a form or sample in Blackbaud NetCommunity, you can import the XML to create a copy of the form. To create the XML, you click **Click here to export this form** or **Click here to export this sample** in the *Forms* gallery. To import the XML, you click **Import form**. On the Import Form screen, enter a name, select a folder, and paste the XML in the **Form XML** field. Click **Next**. The Form Designer appears, and you can edit the form as necessary.

**Warning:** You must copy and paste the XML from *Notepad* or another text editor. If you copy the XML directly from an XML editor or web browser, the Form Designer cannot create the form.

**Form Designer**

**Configure form**

On the Form Designer, you can create a form to collect data from website users. Enter a form name and description, and select a form type. If the form type connects to a database, you can access fields and code tables from that database, and you can use the data that users submit to create or update records. The Common form type does not connect to a database. For this form type, you can store data in the program, print a copy, and export it to another program.

Form type: \*  
Common

Form description:  
<Enter a name for this form >

Form name: \*  
<Enter a name for this form >

Folder:  
Forms

☐ Suspend form

To prevent users to start or submit forms but still allow them to access the status of completed forms, select this checkbox.

Next Cancel

3. In the **Form type** field, select the form type. The form type determines the elements that are available for the form.

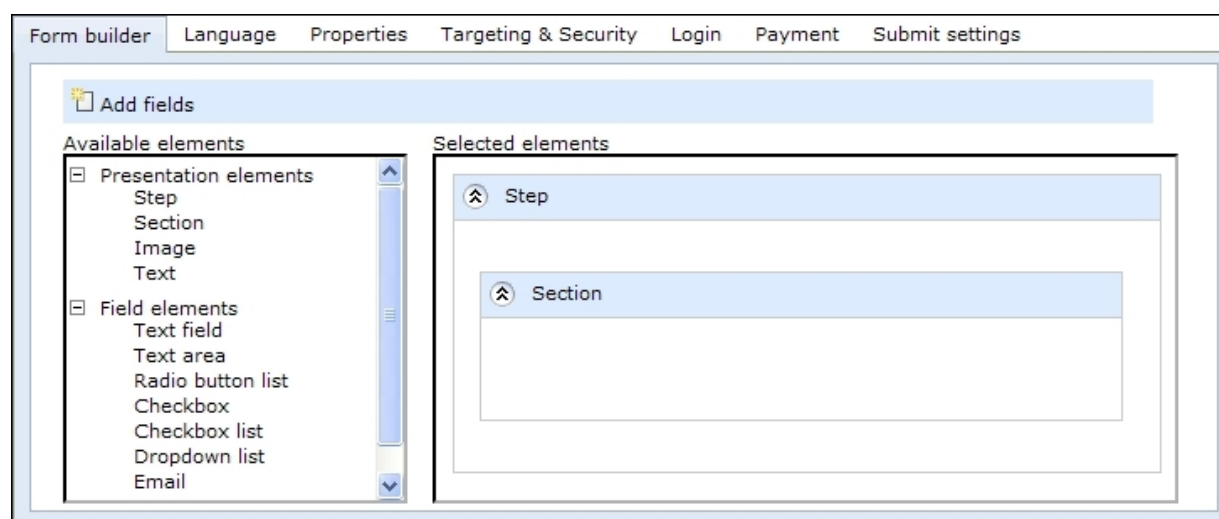
- The Common form type only includes presentation elements and field elements that are available on all forms. Fields on a Common form do not map to another database.

For users with *Online Admissions* you can access code tables from The Education Edge on Common forms.

- With Online Admissions and Online Reenrollment form types, you can access fields and code tables from The Education Edge. These form types allow you to create or update records in The Education Edge with data that website users submit. On the Form Designer, you add pre-mapped field sets and then select the fields to include on the form

**Note:** The Online Reenrollment form type is only available to students who were added to The Education Edge as applicants. If you add a student to the system as a student and no applicant record exists, then the student cannot reenroll on the Online Reenrollment form.

4. In the **Form name** and **Form description** fields, enter a name and description for the form.
5. In the **Folder** field, select a folder to store the form. By default, the program uses the **Forms** root folder.
6. To prevent website users to start or submit the form, select **Suspend form**. This allows website users to view the statuses of their forms but not start forms or submit data. You can use this checkbox to enforce submission deadlines and still allow users to monitor their statuses online.
7. To design the form, click **Next**. The Form builder tab appears.



8. Under **Available elements**, the Form Designer displays the Common presentation elements and field elements that are available for all forms. To design the form, click and drag elements from **Available elements** to **Selected elements**. Under **Selected elements**, click and drag items to arrange the order for the website.
  - Under **Presentation elements**, select items to organize the form. With steps, you create distinct portions of the form for users to page through. With sections, you group elements within each step. Each form requires at least one step, and each step requires at least one section because you cannot place other elements directly on steps. You can also add images and text as necessary.
  - Under **Field elements**, select fields to collect data from website users. The Common field elements include the text field, text area, radio button list, checkbox, checkbox list, dropdown list, and a special email field that sends confirmation email messages to the email addresses that users enter. These fields do not map to a database outside of the program.
  - For Online Admissions forms, the **Applicant** category automatically appears. The fields in this category map to The Education Edge.
  - For Online Reenrollment forms, the **Student** category automatically appears. The fields in this category map to The Education Edge.

**Note:** To edit element properties such as labels, style sheets, and validators, place the cursor over an element in **Selected elements** and click **Edit**. An element properties screen appears. For information about properties of presentation elements and field elements, see [Properties of Form Elements on page 29](#).

9. With Online Admissions and Reenrollment form types, you can add field sets that map to corresponding fields in The Education Edge. After you add field sets, they appear as categories under **Available elements**, and you can add their pre-mapped fields to the form to create or update records in The Education Edge. To expose field sets, click **Add fields**. The Add fields screen appears.

**Add Fields**

To add mapped fields, select a category and a field set. The category from Available elements determines the available field sets. The category can be the record type that the fields map to, or it can be a field set that contains its own secondary field sets.

Map fields to:

Field set:

Name:

- a. In the **Map fields to** field, select the category in **Available elements** to add the field set to. The category determines the available field sets. It can be the record type that fields map to in the source field database, or it can be a field set that was added to the form that contains secondary field sets.

**Note:** For Online Admissions and Online Reenrollment form types, the **Applicant** and **Student** field sets appear as categories under **Available elements** when you create forms. Initially, you can only add field sets to these categories, but when you add field sets such as Address, Medical, and Individual Relationship, they become categories in the **Map fields to** field.

- b. In the **Field set** field, select the field set to add to the form. After you add a field set, it appears as a category or subcategory under **Available elements**, and you can add its fields to the form. The fields map to corresponding fields in the source database, and you can create or update records with data that website users submit in these fields.

For information about the field mappings between Online Admissions and Online Reenrollment forms and The Education Edge, see [Online Admissions and Online Reenrollment Field Mapping on page 67](#).

- c. In the **Name** field, enter the name to appear under **Available elements**. For example, you can name Individual Relationship field sets for the relationship to the applicant, such as "Mother" or "Father."
- d. On Online Reenrollment forms, to display data in the field set from The Education Edge, select **Include Education Edge data**. When users edit the data on their forms, you can process their changes in the Online Admissions and Online Reenrollment Plug-in to update records in The Education Edge.

**Warning:** If you clear **Include Education Edge data**, the program also clears it for any secondary field sets because it can no longer determine where to map those fields. For example, when an Address field is associated with a Student field set and you clear the **Include Education Edge data** checkbox for the Student field set, the program also clears it for the Address field set because the address fields are no longer associated with a record in The Education Edge. To reselect the

checkbox, you must edit each field set separately. If you reselect the checkbox for the Student field set, the Address field set does not inherit the selection.

For the Student field set, the program pulls data from the student record associated with the website user. For the Address field set, the program pulls the primary address for the student, individual, or organization.

For the Individual Relationship or Organization Relationship field sets, additional options appear to map the field sets to relationships in The Education Edge. Under **Options**, select the relationships to pull data from and click **Add**. The relationships appear under **Selections**. The form uses the first available relationship that is not already mapped to another field set.

**Warning:** If you import an XML copy of a form from a different database, you must re-map the Individual Relationship and Organization Relationship field sets to relationships in The Education Edge. The XML copy of the form cannot retain these relationship filters because the relationship code IDs do not match from one database to another.

- e. Click **Save**. You return to the Form Designer. You can include additional field sets as necessary.
  - f. To add mapped fields to the form, click and drag them from **Available elements** to **Selected elements**.
10. To rename the labels, headings, and other text that appears on the form, select the Language tab. For information about the Language tab, see the *Website Design Guide*.
  11. To assign website security rights for users and roles, select the Targeting & Security tab. For information about the Targeting & Security tab, see the *Website Design Guide*.
  12. To select login settings for the form, go to the Login tab.

Form builder Language Properties Targeting & security **Login** Payment Submit settings Checklist status

☒ **Require login** Select whether to require users to log in before they can view the form. You enter the login settings on the Form Display part.

☒ **Allow users to save form**

☒ **Allow users to delete a form**

**Apply as**  
Allow users to apply as:  
**Applicants and selected relationships** Select the users who can submit applications. You can require applicants to apply, or you can allow other users to apply on their behalf. When users apply, the program adds them as users in **Admissions Office** with rights to access online modules.

Select the relationships who can apply on behalf of applicants:

- ☒ Aunt
- ☒ Benefit Provider
- ☒ Benefit Recipient
- ☒ Brother
- ☐ Brother-in-Law
- ☐ Contact

☐ **Create Raiser's Edge sign-up transactions** Select whether to send sign-up information to The Raiser's Edge when users save or complete this form.

☐ **Allow only one form submission** Select whether to restrict a user to being able to only fill the form out once.

13. To require website users to log in to access the form, select **Require login**. Additional login options appear.

**Note:** The Online Admissions and Online Reenrollment form types require users to log in. For these form types, **Require login** is selected by default and you cannot clear it.

- To allow website users to save their data on a form and return to it later, select **Allow user to save form**.
- To allow website users to delete a form and not submit it, select **Allow user to delete a form in progress**.
- For Online Admissions forms, in the **Allow users to apply as** field, select the users who can submit applications. You can require applicants to apply themselves, allow applicants and selected relationships to apply, or require users with selected relationships to apply on behalf of applicants. If you allow other users to apply on behalf of applicants, select the relationships to allow.
- For Online Reenrollment forms, under **Reenroll as**, select the relationships who can reenroll on behalf of students.

**Note:** If you allow users to apply on behalf of applicants, you must add an Individual Relationship field set to the form and include the **Last name** and **Relationship** fields. This ensures that the users are linked to individual records in The Education Edge. Users select a relationship when they log in, and then select it again on the form. For the Individual Relationship field sets where the

relationships match, the program creates or updates individual records in The Education Edge and links them to website users. If you only allow one relationship type to apply on behalf of applicants, you can set it as a default and hide the **Relationship** field on the form.

- For Online Reenrollment forms, under **Students to include**, select the students who can reenroll on the form. You can include all students from The Education Edge, or you can use a query to filter students. For the students you include in the online reenrollment process, the form can prepopulate fields with data from The Education Edge.

**Warning:** If you select a query to filter students and someone deletes the query, the form becomes available to all students. To avoid this scenario, we recommend that you restrict access to the query when you create it in The Education Edge.

- To create constituent records in The Raiser's Edge for any users who register for your website through this form, select **Create Raiser's Edge sign-up transactions**. You enter user login settings for the form on the Form Display part.

**Note:** For Common forms, **Create Raiser's Edge sign-up transactions** is always selected when you require users to log in to access the form.

When a user registers through an Online Admissions or Online Reenrollment form, a signup transaction is sent to The Raiser's Edge. When the user submits the form, the program links that constituent record in The Raiser's Edge to the applicant, student, or individual record in The Education Edge.

**Note:** In The Education Edge, when you convert an individual record to an applicant record, the program assigns a new identification number. However, the Online Admissions and Online Reenrollment Plug-in does not assign new identification numbers. When a user with an existing individual record submits an Online Admissions form, the plug-in converts the individual record to an applicant record but retains the individual's identification number.

- To restrict users to submit a form only one time when they are logged in to your site, select **Allow only one form submission**.

14. To charge a fee when users submit the form, select the Payment tab and select **Charge fee with form**. Additional payment options appear.

**Note:** Fees associated with forms do not generate gift records in The Raiser's Edge. However, you can go to the Data tab in *Forms* to confirm that users paid the fee. Users must pay the fee to submit forms, so if form data appears on the Data tab, users paid the fee. To view details about the payment, you can access your merchant account.



**Form builder**   Language   Properties   Targeting & security   Login   **Payment**   Submit settings   Checklist status

---

☒ Charge fee with form   Select whether to charge users a fee to submit the form, and enter payment settings.

### Fee amounts

Action	Display name	Amount	Criteria

+ Add form fee

### Payment setup

☒ Use payment part   ☐ Proceed directly to payment

Using this option requires that the user be able to save their form. This will allow parents to complete forms for multiple children while submitting only one payment for all the children's forms.

Payment page: \*

Select the page with the shopping cart to process transactions. For the Payment 2.0 part, the program cannot process direct debit on forms. If you select a payment part with only the direct debit option selected, website form users will be unable to proceed to the payment screen.

---

Design an acknowledgement message. On the Payment 2.0 part, you can use the **Combined Acknowledgements** merge field to include this message on the confirmation screen or acknowledgement email that users receive after they check out.

🔍 🔍

**Formatting**   Insert   View

Paste  
 Cut  
 Copy  
[HTML](#)   [Code](#)

Font family ▾   Font size ▾   [List icons] [Link icon] [Unlink icon]  
**B**   *I*   U   ABC   A ▾   B ▾   [Bulleted list icon]   [Numbered list icon]   [Decrease indent icon]   [Increase indent icon]   x<sup>1</sup>   x<sub>1</sub>   ABC ▾

Find  
Format ▾  
 Remove formatting

15. Under Fee amounts, to add a fee amount, click **Add form fee**. The Fee amounts screen appears.
  - a. Enter a name for the form fee.
  - b. Enter the dollar amount for the form fee.
  - c. In the **Criteria** field, select if the form fee applies to everyone or based on how a website user answers a field on the form.
  - d. If you select Based on fields in the form, click **Add a new rule**. The New Rule screen appears.
  - e. Select the step, section, field, and response, that if they choose on the form, the fee is added to the total form fee amount. For example, if a website user answers yes to participation in a club activity, you can charge a conditional fee on only club participants.
  - f. Click **Save**. You return to the Fee amounts screen.
  - g. Click **Save** again. You return to the Form Designer screen. Add as many separate form fees as you need.
16. Under Payment setup, select to use a Payment 2.0 part or to proceed directly to payment with your merchant account.
17. If you select to use a payment part, select the payment page and then write an acknowledgement message.

**Note:** If you select to use the payment part, you first need to set up your payment and merchant information in the Payment 2.0 part before you select it in the form.

18. If you select to use your merchant account, in the **Merchant account** field, select a merchant account such as your organization's IATS account to process credit card transactions received through the form.
  - a. The system supervisor sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.
  - b. To display CAPTCHA text for users to enter before they proceed with the payment, select **Display reCAPTCHA**.
  - c. CAPTCHA is an automated public turing test to tell computers and humans apart to help prevent automated abuse of your website. You enable *reCAPTCHA* in *Administration*. For more information, see the *Administration Guide*.
19. Select the payment methods available to users. Credit cards are allowed by default.
  - To allow users to pay at a later time, select **Bill me later**.
  - To allow users to waive the fee, select **Allow users to waive the fee** and enter a waiver code in the field that appears.

**Warning:** To use the **Bill me later** or Allow users to waive the fee payment options with Online Admissions or Online Reenrollment forms, you must associate the payment with a track and checklist items in The Education Edge. If you do not associate these options with checklist items, the program does not record payment information for these payment types.

20. For Online Admissions and Online Reenrollment forms, in the **Tracks and checklist items** field, select the checklist item to associate with the payment. A track is a series of steps that makes up part of the admissions process, and checklist items are the individual steps that make up the track. For more information about tracks and checklist items in The Education Edge, see the *Configuration Guide*.

When an user pays the fee, the associated checklist item in The Education Edge is marked complete.

21. To edit settings for when users submit the form, select the Submit settings tab.

The screenshot shows the 'Submit settings' tab selected in a form builder interface. The tab bar at the top includes 'Form builder', 'Language', 'Properties', 'Targeting & Security', 'Login', 'Payment', 'Submit settings', and 'Checklist status'. The main content area is titled 'Checklist setting on form submission' and contains the instruction 'Select the checklist item to mark complete when you receive the form.' Below this is a dropdown menu labeled 'Tracks and checklist items:'. Further down, the section 'Confirmation screen' is shown with the instruction 'Specify whether to use the default acknowledgement page or a custom one.' There are two radio buttons: 'Use default confirmation screen' (which is selected) and 'Use custom confirmation screen'.

22. For Online Admissions and Online Reenrollment forms, in the **Tracks and checklist items** field, select the checklist item to associate with the submission of the form. When a user submits the form, the associated checklist item in The Education Edge is marked complete.
23. Under **Confirmation screen**, select whether to use the default screen or create a custom screen.
  - To use the default, select **Use default confirmation screen**.
  - To design the confirmation screen, select **Use custom confirmation screen**. The HTML editor appears. The program's default confirmation screen appears in the HTML editor for you to customize according to your needs.

Edit the content for the confirmation screen. To format the appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

**Warning:** If you customize the confirmation screen and then select **Use default confirmation screen**, your changes to the confirmation screen remain. To remove changes, select **Use custom confirmation screen** and click **Restore default content**.

24. Under **Email alert**, select **Send an email alert when a user submits a form** to send an email to staff members when a website user submits a form.

**Email alert**

☒ Send an email alert when a user submits a form

**Recipients**  
Users and roles:

Select all | None [Add users and roles](#)

Email addresses: ?

Subject: \*

From address: \*

☐ Include form data in the email alert

To display form data in the body of the email alert, select this option. By default, the email links to a PDF version of the form, and when you select this option, the email also includes form data.

25. Under **Recipients**, to send the alert to individual users and users in a role, click **Add users and roles**. The Select users and roles screen appears.

**Select users and roles**

To add users or roles, move them from **Available** to **Selected**. Up to 100 users and roles appear in alphabetical order. To search for additional users and roles, use the **Filter** field.

Filter:

Filter by type:

Both ▼

Available:

- EE users
- Email link
- Gabriel
- ImageOnly
- Katie
- Matthew
- Members

Add >

Add all >>

< Remove

<< Remove all

Selected:

- In the **Filter** field, enter the first letter of the user or role to include.

**Note:** The **Available** box displays 30 users and roles in alphabetical order. Use the **Filter** field to find additional users and roles that do not appear in the box.

- Locate the user or role, and click **Add**. The user appears in the **Selected** box.  
To select multiple users or roles, press **SHIFT** while you select the multiple users, and then click **Add all**. The users appear in the **Selected** box.
- Click **OK**. You return to the Submit settings tab. The users and roles appear in the **Users and roles** box.

- To send the notification to a staff member who does not have a Blackbaud NetCommunity account, enter an email address under **Email addresses**.

**Note:** You can select to send the notification to individual users and users in roles instead of, or in addition to, individuals who do not have a Blackbaud NetCommunity account. When you enter multiple email addresses, separate them by a comma or semicolon.

- Enter a subject in the **Subject** field and an email address in the **From** field for the email alert.
- To display form data in the body of the email alert, select **Include form data in the email alert**. By default, the email links to a PDF version of the form, and when you select this option, the email also includes form data.
- To edit settings for checklist items on Online Admissions forms, select the Checklist status tab.

Form builder Language Properties Targeting & Security Login Payment Submit settings Checklist status

When you create an Online Admissions form, the program can associate it with the tracks and checklist items that are part of your application process. To set up or view the checklist items for a track in **The Education Edge** or **Student Information System**, select **Tracks** in Configuration. To view available checklist items, select **Tables** in Configuration and select the **Checklist Item** table.

### Application checklist items

For Online Admissions forms, website users can view checklist items for the forms they start. You can allow users to view all checklist items, or you can select checklist items to exclude.

☒ Include all checklist items  
☐ Filter checklist items

Select this option to display all checklist items associated with the form. To filter checklist items, select **Filter checklist items**.

### Checklist item status

The status indicates the progress that users make on a checklist item. You can allow users to view checklist items regardless of status, or you can select statuses to exclude so that users can only view checklist items with certain statuses.

☒ Include all statuses  
☐ Filter checklist statuses

Select this option to display checklist items regardless of status. To filter by status, select **Filter checklist statuses**.

30. Under **Application checklist items**, select the checklist items that users can view for their forms. You associate tracks and checklist items with the application in The Education Edge, and the program associates this information with your online forms. Website users can view the status of their checklist items on the form landing page.
  - To allow users to view all checklist items associated with the form, select **Include all checklist items**.
  - To filter the list of checklist items that users can view, select **Filter checklist items**. In the list that appears, select the checklist items to exclude. Website users cannot view the items you select.
31. Under **Checklist item status**, select whether to filter the checklist items that users can view according to the status.
  - To allow users to view checklist items regardless of the status, select **Include all statuses**.
  - To filter checklist items by status, select **Filter checklist statuses**. In the list that appears, select the statuses to exclude. Users cannot view checklist items with the statuses you select.
32. To create an acknowledgement email for website users who submit forms, click **Acknowledgement email**. The Acknowledgement Email screen appears.



# Manage Rules

When you create online forms for your website, you use the Form Designer to include presentation elements and field elements. Presentation elements include steps, sections, images, and text. Forms are organized into steps and sections, and each form requires at least one step and section before you can add other elements. Field elements include text fields, text areas, radio button lists, and more.

In addition to presentation elements and field elements that are available on all forms, the Online Admissions and Online Reenrollment form types allow you to add pre-mapped field sets that map to corresponding fields in The Education Edge. With these form types, you can accept applications online and map the data that users submit to The Education Edge.

To guide users through the form, you can show, hide, require, or disable fields, steps, or sections based on the values users enter in fields with a yes or no, dropdown, or radio button response. Before you set up rules, we recommend you plan out and enter your form first. Then, you can set up field rules, section rules, or step rules. In field rules, you can show, hide, require, or disable fields based on the value entered in a field. For example, if a student says yes, he received his tetanus shot, you can require him to fill out the date of his last shot.

In section rules, you can show or hide sections based on the value the user entered in a field. In step rules, similar to section rules you can show or hide steps based on the value the user entered in a field.

On the Form Designer, Form builder tab, to set up form rules, click **Manage rules**.

Action	ID	Rule
--------	----	------

## > Create a form rule

1. From the Form Designer, Form builder tab, click **Manage rules**. The Rules screen appears.
2. Select which type of rule you want to add, a field rule, section rule, or step rule. Each type of rule has its own tab.
3. Click **Add a new rule**. The New Rule screen appears.

4. In the **If** fields, select the step, section, and field that if a user enters a value, a field, section, or step will show or hide.

**Tip:** You can only create rules for fields with a yes or no, dropdown, or radio button response.

5. In the **is equal to** box, based on the field you chose, select or enter the value.
6. In the **Then** field, if you set up a step or section rule, select Show or Hide. If you set up a field rule, select Show, Hide, Require, or Disable.
7. For field rules, to show, hide, require, or disable a field, select the step and section the field is in and then select the field.  
For section rules, to show or hide a section, select the step the section is in and then select the section.  
For step rules, to show or hide a step, select the step.
8. Click **Save** to add the rule and return to the Rules screen. Continue to add as many form rules as you need.

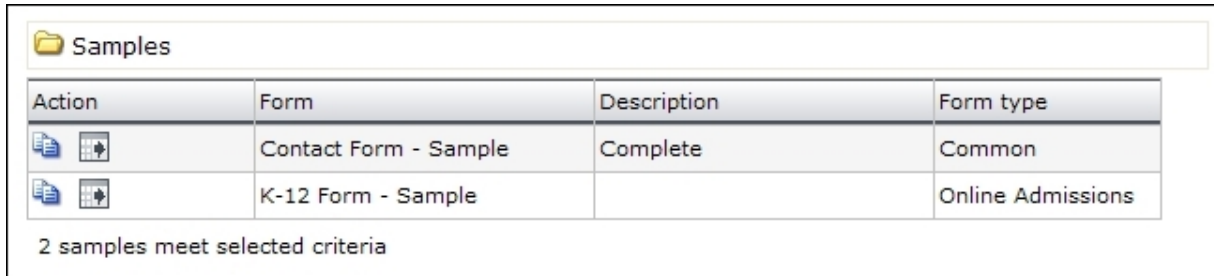
## Sample Forms



In *Forms*, the Samples tab provides sample forms to use as a starting point for new forms. You cannot edit the samples or place them directly on your website through a Form Display part. However, they are useful to save time when you create forms. You can copy a sample form that is similar to the form you want and edit it as necessary.



## ➤ Copy a sample form to design a new form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. Select the Samples tab. The gallery displays the available samples.



Samples			
Action	Form	Description	Form type
	Contact Form - Sample	Complete	Common
	K-12 Form - Sample		Online Admissions

2 samples meet selected criteria

3. To create a form based on a sample, select it and click **Click here to copy this sample**. The Copy Form screen appears.
4. Enter a name, select a folder for the new form, and click **Next**. The Form Designer appears, and you can edit the form as necessary. For information about how to design a form, see [Design Forms on page 9](#).

**Note:** You can also create an XML version of a sample form and use the XML to create a form. To generate the XML, select the sample and click **Click here to export this sample**. To create a form based on the XML, click **Import form**. On the screen that appears, enter a name, select a folder, and paste the XML from *Notepad* or another text editor into the **Form XML** field. Click **Next**. On the Form Designer, you can edit the new form as necessary.

5. Click **Save**. You return to *Forms*.

To post the form on your website, place it on a Form Display part. For information about the part, see the *Parts Guide*.

After you place the form on the website, you can view summary information about the form and manage the data that website users submit on the Data tab. For information about the Data tab, see [Manage Data from Online Forms on page 25](#).

## Manage Data from Online Forms

After you place forms on your website, you can go to *Forms* to manage the data that website users submit. On the Data tab, you can view summary information about the forms, and after users start forms, you can manage their data.

On the Summary tab, the grid displays the number of forms started and completed for each form on the website. On the Detail tab, you can edit the data that website users enter on the forms. You can also delete, export, and print entries. On the Export & Print tab, you can filter your forms to export a group of form data to a .csv file or print the data. On the Payments tab, you can review and export the payment information for each submitted form.

For Online Admissions and Online Reenrollment forms, you can also resubmit form data to the Online Admissions and Online Reenrollment Plug-in.

## ➤ Manage data that website users submit in online forms

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. To view information about the forms on your website and manage the data that website users enter on the forms, select the Data tab.
3. On the Detail tab, entries appear for the data that website users enter. To filter the entries, enter your search criteria and click **Search**. Entries that match your criteria appear.
  - To search a particular site, enter the site in the **Forms created on** field.
  - To search for data from a particular form, select it in the **Form** field.
  - To search for data from a particular form type, select it in the **Type** field.
  - To filter data according to whether users started or completed the form, use the **Status** field.
  - To filter data according to when users completed the form, enter a start date in the **Date completed** field and an end date in the **To** field.

**Note:** The **Date completed** and **To** fields are disabled when you select "All" or "Started" in the **Status** field because you cannot search for forms that were started during a period of time.

- To filter data according to whether you created PDFs, use the **Print status** field.
4. On the Summary tab, statistics appear for all forms on the website. The list includes the number of times website users started and submitted each form on your website.
  5. On the Export & Print tab, you select the criteria to filter forms for print or export. For more information, see [Export or Print Form Data on page 27](#).
  6. On the Payments tab, you can review the payment status for a form and export the payment information to a .csv file. For more information, see [Form Payments on page 28](#).
  7. To manage the data that website users submit, select the Detail tab. Entries that match the search criteria on the Data tab appear.
    - To view a form's data, click a user name under **Name**. An HTML version of the form appears in a separate window. You can use this HTML as a preview before you perform any actions.
    - To create a PDF with user data, select the checkboxes for the data to include and click **Print**. The PDF appears in a separate window. You can save or print the PDF for your records.
    - To create a comma-separated-values file with user data, select the checkboxes for the data to include and click **Export**. The program creates a .csv file that you can edit in Microsoft *Excel*.

**Note:** You cannot create a .csv file with data from multiple forms. All the entries you select must include data from the same form.

- For Online Admissions and Online Reenrollment forms, you can resubmit form data to the Online Admissions and Online Reenrollment Plug-in. For example, if you delete data in the plug-in by mistake, you can resubmit it from the Data tab. You can also resubmit form data to overwrite changes you make in the plug-in. Select the checkboxes for the forms to resubmit, and click **Resubmit**.

**Warning:** If you resubmit a form that you edited but did not process in the plug-in, you lose your changes. The program overwrites the data in the plug-in with the unedited data from the Data tab.

- To delete entries, select the checkboxes and click **Delete**. For example, you may want to delete entries after you process the data.
8. As website users create and submit forms, the program updates the Data tab. To manage the data from your online forms, you will need to monitor the Data tab.

## Export or Print Form Data

On the Export & Print tab, you select criteria to determine which forms you want to print or export from *Forms*. If you select to export form data, you can save or open a .CSV file. If you select to print form data, a new window opens and your data appears as a .PDF file. You can choose to print the data or save the Adobe *Acrobat* file. To print the data, from the browser window, click **File, Print**. Select the name of the printer and your print options, then click **OK**.

**Form Data**

Detail Summary **Export & Print** Payments

*Select the criteria of the forms to print or export. Since the filters below may not apply to all forms, the program uses only the applicable filters to determine whether to include a form.*

Forms created on:

Form:

Type:

School year apply:

Current grade level:

Status:

Form completed:  From:  To:

Print status:

To filter the forms for export or print, select your filter criteria:

- To print or export data from one site location in your organization, click the binoculars to search for and select the site in the **Forms created on** field.
- To print or export data from a particular form, select it in the **Form** field.
- To print or export data from a particular form type, select it in the **Type** field.
- For Online Admissions forms, to print or export data from a particular school year or grade level, select them in the **School year apply** and **Current grade level** fields.
- To print or export data with a particular form status, select it in the **Status** field.
- To print or export data from a particular date or date range, select it in the **Form completed** field.
- To print or export data based on the print status, select the status in the **Print status** field.



# Properties of Form Elements

After you place elements on a form in the Form Designer, you can edit the properties for the elements. To design the form, drag and drop items from **Available elements** to **Selected elements**. To edit the properties for an element, place the cursor over the element in **Selected elements** and click **Edit**. An element properties screen appears. After you edit the properties, click **Save**. The tables in this section describe the properties for the Common presentation elements and field elements that are available for all forms.

**Note:** Most fields in Online Admissions and Online Reenrollment forms use the same properties as fields in Common forms. However, the properties for the **Current Status**, **Parents Are, Same Address As Applicant**, (organization relationship) **Name**, and **Same Address As Student** fields are different. For information about these field properties, see [Current Status Field on page 37](#), [Parents Are Field on page 38](#), [Education Relationship Name on page 42](#), and [Same Address Field on page 40](#).

## Step and Section Elements

You use the step and section elements to organize the form. With steps, you create distinct portions on your forms for users to page through. With sections, you group elements within steps. Each form requires at least one step, and each step requires at least one section because you cannot place other elements directly on steps.

Option	Function
<b>Label</b>	Enter a label for the step or section.
<b>Hide label</b>	If the label is for internal purposes and should not appear on the website, select <b>Hide label</b> .
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the <i>Website Design Guide</i> .

## Image Element

You use the image element to place images from *Image Library* on the form.

### Option

### Function

<b>Alternative text</b>	Enter text to appear in place of the image if the image is unavailable for any reason.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the <i>Website Design Guide</i> .
<b>Insert image, Remove image</b>	To select an image from <i>Image Library</i> , click <b>Insert image</b> . The Select Image From Image Library screen appears. The image you select appears under <b>Preview</b> . To remove it, click <b>Remove image</b> . For information about <i>Image Library</i> , see the <i>Website Design Guide</i> .

## Text Element

You use the text element to insert instructional text or additional information on the form. The text is not associated with field elements. You can use it to guide users through the form.

Text:

Custom CSS class:

### Option Function

**Text** Enter text to appear on the form. The text element displays up to 500 characters and is not associated with a field element. You can use the text to provide step- or section-level instructions.

**Custom CSS class** To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.

For information about style sheets, see the *Website Design Guide*.

## Text Field, Text Area, and Email Elements

With the text field, text area, and email elements, you can place fields on the form for users to enter data. The text field and email elements are standard fields, while the text area element includes additional space for longer responses.

**Warning:** The email element is a special field that sends confirmation messages to the email addresses that users enter. To collect email addresses but not send confirmation messages, use the text field element.

Label:  ☐ Hide label

☐ Required

Validator:

Validation warning:

Required message:

Character limit:

☐ Hidden

Default value:

Inline help:

☒ Include in export

Custom CSS class:

## Option      Function

<b>Label</b>	Enter a label for the field.
<b>Hide label</b>	If the label is for internal purposes and should not appear on the website, select <b>Hide label</b> .
<b>Required</b>	To require users to enter a value in the field before they can submit the form, select <b>Required</b> .
<b>Required message</b>	If a field is required, enter text to appear beside it when users attempt to submit the form without values in the field.
<b>Hidden</b>	If a field is for internal purposes and should not appear on the website, select <b>Hidden</b> . You must enter a value in the <b>Default value</b> field.
<b>Inline help</b>	Enter instructional text or additional information about the field. A link beside the field allows users to access the text.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.  For information about style sheets, see the <i>Website Design Guide</i> .
<b>Validator</b>	To restrict entries to certain characters or formats, select a validator. For information about the validators, see <a href="#">Validators on page 43</a> .
<b>Validation warning</b>	If you select a validator, a default error message appears in this field. The message appears beside the field when users attempt to submit the form and the field entry does not meet the validator's requirements. You can edit the message as necessary.
<b>Character limit</b>	Enter the maximum number of characters for the field.
<b>Default value</b>	Enter a default value to appear in the field when users start the form.
<b>Include in export</b>	To include the field when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.

## Checkbox Element

With the checkbox element, you can place a standalone checkbox on the form and select whether to select it for users by default.



## Option Function

<b>Label</b>	Enter a label for the checkbox.
<b>Hide label</b>	This option is disabled for the checkbox element.
<b>Required</b>	To require users to select the checkbox before they can submit the form, select <b>Required</b> .
<b>Required message</b>	If the checkbox is required, enter text to appear beside it when users attempt to submit the form without selecting it.
<b>Hidden</b>	If the checkbox is for internal purposes and should not appear on the website, select <b>Hidden</b> . You must select a value in the <b>Default value</b> field.
<b>Inline help</b>	Enter instructional text or additional information about the checkbox. A link beside the checkbox allows users to access the text.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the <i>Website Design Guide</i> .
<b>Default value</b>	Select "Yes" to select the checkbox by default or "No" to clear it.
<b>Include in export</b>	To include the checkbox when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.

## Radio Button List, Checkbox List, and Dropdown List Elements

With the radio button list, checkbox list, and dropdown list elements, you can place fields on the form for users to select responses. You can enter the options for users to select from, or you can import code table values from The Raiser's Edge.

If you have *Online Admissions*, you can also import code table entries from The Education Edge.

## Option      Function

<b>Label</b>	Enter a label for the list.
<b>Hide label</b>	If the label is for internal purposes and should not appear on the website, select <b>Hide label</b> .
<b>Required</b>	To require users to select a value in the list before they can submit the form, select <b>Required</b> .
<b>Required message</b>	If the list is required, enter text to appear beside it when users attempt to submit the form without selecting a value in the list.
<b>Hidden</b>	If the list is for internal purposes and should not appear on the website, select <b>Hidden</b> . You must select a value in the <b>Default value</b> field.
<b>Inline help</b>	Enter instructional text or additional information about the list. A link beside the list allows users to access the text.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.  For information about style sheets, see the <i>Website Design Guide</i> .

## Option      Function

<b>List values (enter values on separate lines)</b>	<p>In the dropdown list, select whether to create a list or import entries from a code table. To create a list, enter values on separate lines. To import code table entries, select the code table. You can edit the code table entries you import, but your changes do not affect the source code table.</p> <p><b>Warning:</b> For checkbox lists, entries cannot include nonaphanumeric characters such as "&lt;," "&gt;," and "&amp;." If you import a code table entry or enter a list item with such characters, no label appears on the form for that entry's checkbox.</p>
<b>List default value</b>	Enter a value to select by default in this list when users start the form.
<b>Allow other</b>	To allow users to enter values not in the list, select <b>Allow other</b> . When users select "Other," a field appears on the form for these values.
<b>Other field character limit</b>	If you allow users to enter their own values, enter the maximum number of characters for the field.
<b>Include in export</b>	To include the list when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.

## File Attachment Element

With the file attachment element, you can place a file attachment upload field on the form for users to upload documents to the form. For each file attachment element, you choose which Documents part to use for file attachment settings. Uploaded documents appear in *Forms* on the Data tab.

After an applicant uploads a document with the file attachment element, when you process the form in the Online Admissions and Online Reenrollment Plug-in, you can then view the documents from the applicant record.

**Tip:** To view a document uploaded through the file attachment element on a form and processed with the Online Admissions and Online Reenrollment Plug-in, in The Education Edge open the applicant record. From the applicant record menu, select **Applicant, Online Files**. All online files uploaded for the applicant appear. Double-click the URL to open any online file.

## Option Function

<b>Label</b>	Enter a label for the field.
<b>Hide label</b>	If the label is for internal purposes and should not appear on the website, select <b>Hide label</b> .
<b>Required</b>	To require users to select a value in the field before they can submit the form, select <b>Required</b> .
<b>Required message</b>	If the field is required, enter text to appear beside it when users attempt to submit the form without selecting a value in the field.
<b>Inline help</b>	Enter instructional text or additional information about the field. A link beside the field allows users to access the text.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the <i>Website Design Guide</i> .
<b>Select document part</b>	To upload files, the file attachment element uses the Document part to determine how files upload. Search for and select a document part to use. You can set up Document parts for each file attachment element used on a form, or create one Document part for all your file attachment needs. For information about the Document part, see the <i>Parts Guide</i> .
<b>Max file size</b>	This field displays the maximum file size allowed for document uploads. To edit the maximum file size, you need to edit the setting on the Document part.
<b>Allowed file types</b>	This field displays the MIME file types allowed for document uploads. To edit the MIME file types, you need to edit the settings on the Document part.

## Option Function

<b>Default file name</b>	Enter a default name for file uploads. If you do not enter a default file name, the file name as uploaded by the user defaults.
<b>Prefix form name</b>	To prefix your file name with the name of the form, select the checkbox. When a user uploads a file, the name will be <form name> - <default file name>
<b>Append applicant name</b>	To append your file name with the name of the applicant, select the checkbox. When a user uploads a file, the name will be <form name> - <applicant name>. If you select to prefix the file name with the form name and append with the applicant name, the name will be <form name> - <default file name> - <applicant name>.

## Current Status Field

The **Current Status** field appears in the Application field set that is a subset of the Applicant field set on Online Admissions forms. This field maps to the **Current status** field on the Applications tab of an applicant record in The Education Edge. When you create an applicant record in The Education Edge, the program requires an entry in the **Current status** field. Therefore, you must include the corresponding **Current Status** field on the Online Admissions form.

The field properties for this field include an extra option that does not appear for Common fields.

Application >> Bio 1/Applications - Current status

Label: 
☐ Hide label

☒ Required

☒ Hidden

Inline help:

Custom CSS class:

☒ Include in export

Options

Inquiry
Accepted - Not Enrolled
In Process
Enrolled

Add
Remove

Selections

Applied

Up
Down

Save
Cancel

## Option Function

<b>Label</b>	Enter a label for the step or section.
<b>Hide label</b>	If the label is for internal purposes and should not appear on the website, select <b>Hide label</b> .
<b>Required</b>	The <b>Current Status</b> field is required by default, and you cannot clear this option.
<b>Hidden</b>	The <b>Current Status</b> field is hidden by default, and you cannot clear this option.
<b>Inline help</b>	Enter instructional text or additional information about the field. A link beside the field allows users to access the text.
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.  For information about style sheets, see the <i>Website Design Guide</i> .
<b>Include in export</b>	To include the field when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.
<b>Options, Selections</b>	In the <b>Options</b> box, select statuses to apply to the application and click <b>Add</b> . The statuses appear in the <b>Selections</b> box. The statuses associate tracks and checklist items with the form. For multiple statuses, the values are applied sequentially in the order you select them, so the form will reflect the last status you select. For example, if you add the Inquiry status and then the Applied status, the <b>Status</b> field in The Education Edge will display the Applied status. In the <b>Selections</b> box, the last status added to the form appears at the bottom of the list.

## Parents Are Field

The **Parents Are** field appears in the Applicant field set on Online Admissions forms. This field allows you to collect information about the relationship between an applicant's parents and create the correct relationships between the individual records in The Education Edge.

The field properties for this field include extra options that do not appear for Common fields.

Applicant >> Relationship - Relationship between parents

Label:  ☐ Hide label

☐ Required

Required message:

Inline help:

Custom CSS class:

☒ Include in export

Who is parent/guardian 1?  Who is parent/guardian 2?

Create spouse relationship between parent/guardian 1 and parent/guardian 2 using:

	Relationship	Reciprocal Relationship	Is Spouse
Single Parent	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
Married	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
Divorced	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
Separated	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>

**Option****Function****Label**

Enter a label for the step or section.

**Hide label**

If the label is for internal purposes and should not appear on the website, select **Hide label**.

**Required**

To require users to select a value in this field before they can submit the form, select **Required**.

**Required message**

If the field is required, enter text to appear beside it when users attempt submit the form without a value in the field.

**Inline help**

Enter instructional text or additional information about the field. A link beside the field allows users to access the text.

Option	Function
<b>Custom CSS class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.  For information about style sheets, see the <i>Website Design Guide</i> .
<b>Include in export</b>	To include the field when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.
<b>Who is parent/guardian 1?</b>	Select an Individual Relationship field set from the form to designate as the applicant's first parent or guardian.
<b>Who is parent/guardian 2?</b>	Select an Individual Relationship field set from the form to designate as the applicant's second parent or guardian.
<b>Create spouse relationship between parent/guardian 1 and parent/guardian 2 using</b>	Select the relationships to create between the individual records for the applicant's parents or guardians. The rows represent the options that website users can select in the <b>Parents Are</b> field, and the values you select in the columns determine the corresponding relationships in The Education Edge. For example, if the first parent or guardian is the mother and the second is the father, then in the <b>Married</b> row, select "Wife" in the <b>Relationship</b> column for the mother's relationship to the father and "Husband" in the <b>Reciprocal Relationship</b> column for the father's relationship to the mother.

## Same Address Field

The **Same Address As Applicant** or **Same Address As Student** checkboxes appear in the Address field set for the Individual Relationship category. This checkbox allows you to share address information on applicant, student, and individual records in The Education Edge.

The field properties for this checkbox include an extra option that does not appear for Common checkboxes.

**Note:** On Online Reenrollment forms, you can map Individual Relationship field sets to relationships in order to pull data from The Education Edge. If you map an Individual Relationship field set and a user selects **Same Address As Student** in an Address field set, the same address appears for the student and the relationship. However, if the user edits the address fields for the relationship, the changes are lost when you process the form. The program only process changes to the address for the student.



Address >> Address - Shared addresses

Label: Same Address As
☐ Hide label

Default value: No

☐ Required

☒ Include in export

Required message: Required

Share with this applicant address:

☐ Hidden

Inline help:

Custom CSS class:

Save

Cancel

Option

Function

<b>Label</b>	Enter a label for the checkbox.
<b>Hide label</b>	This option is disabled for the <b>Same Address As Applicant</b> checkbox.
<b>Required</b>	To require users to select the checkbox before they can submit the form, select <b>Required</b> .
<b>Required message</b>	If the checkbox is required, enter text to appear beside it when users attempt to submit the form without selecting it.
<b>Hidden</b>	If the checkbox is for internal purposes and should not appear on the website, select <b>Hidden</b> . You must select a value in the <b>Default value</b> field.
<b>Inline help</b>	Enter instructional text or additional information about the checkbox. A link beside the checkbox allows users to access the text.
<b>Custom CSS Class</b>	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the <i>Website Design Guide</i> .
<b>Default value</b>	Select "Yes" to select the checkbox by default or "No" to clear it.
<b>Include in export</b>	To include the checkbox when you export data that users submit on the form, select <b>Include in export</b> . To exclude it when you export, clear the checkbox.
<b>Share with this applicant address</b>	Select the address type to share. For example, if you request a primary address and a seasonal address from applicants, select one of these address types to share when users select the <b>Same Address As Applicant</b> checkbox.

## Education Relationship Name

When you add the Education Relationship field set to a form, you can use the **Name** field to show a dropdown of all feeder schools in The Education Edge who appear on at least one student record's education history. For example, you track all the schools students attend before they attend your school. On the form, if applicable, you want students to select one of the schools from the dropdown to show their educational history.

When you add the **Education Relationship Name** field, you can choose which list values to include. Only the schools which appear at least one time on a student's educational history record as a past school with the **Feeder school** checkbox selected in The Education Edge appear in the **List Values** box. You can determine which of those schools appear in the dropdown. For example, you add the **Education Relationship Name** field and label it Previous School. You then choose the six most common schools who you enroll students from to include in the dropdown.

To ensure new applicant records in The Education Edge, with a past school selected or entered on the form, have the **Feeder School** checkbox selected on the educational history record, you need to add the **Education Type** field to the form. After you add the **Education Type** field, edit the settings and select the **Hidden** checkbox and select the **List default value** as Past school. You must use the **Education Type** field with the **Education Relationship Name** field to ensure the applicant record in The Education Edge creates an accurate educational history record.

**Warning:** For existing forms with a **Name** field previously added, you need to remove the existing **Name** field and re-add it for feeder schools to appear.

You can also choose to allow students to enter a school name not listed.

Previous School

Label:  ☐ Hide label

☐ Required

Required message:

☐ Hidden

Inline help:

Custom CSS class:

List Values:

- ☒ Ashley Hall
- ☒ Charleston Day School
- ☒ Chirst Our King Stella Mar
- ☒ Palmetto Christian Academ
- ☒ Porter-Gaud
- ☒ St. Paul's Academy

List default value:

☒ Allow other

Other field character limit:

☒ Include in export

Save Cancel

## Validators

After you add text field, text area, and email elements to forms, you can edit the properties to include validators. Several standard validators are available to ensure that user responses meet your criteria. The following table describes the restrictions that the standard validators enforce, as well as the default error messages that appear when users attempt to save data that does not meet the validator criteria.

Validator	Allows	Default Error Message
Alpha	Upper and lower case letters.	Please enter letters only.
Alphanumeric with spaces	Upper and lower case letters, numbers, and spaces.	Please enter letters, numbers, and spaces only.
Alphanumeric without spaces	Upper and lower case letters and numbers.	Please enter letters and numbers only.
Email	Email addresses with the format <code>youraddress@yourdomain</code> .	Please enter a valid email address with the format <code>youraddress@yourdomain</code> .
Numeric	Numbers (just a string of digits).	Please enter numbers only.
Numeric with decimals	Numbers (just a string of digits) and a decimal.	Please enter numbers and a decimal only.
Social Security number	Numbers and hyphens with the format <code>###-##-####</code> .	Please enter a valid Social Security number with the format <code>###-##-####</code> .
U.S. date	Legitimate date with the MM/DD/YYYY format. Months can take one or two digits, from 1 to 12 or 01 to 12. Days can take one or two digits, from 1 to 31 or 01 to 31. The validator recognizes the number of days in a given month and also takes leap years into account.	Please enter a date with the format MM/DD/YYYY.
U.S. phone	U.S. phone number with area code. The validator requires 10 digits. It allows hyphens or periods to separate the area code and first three digits of the phone number, and it allows parentheses around the area code.	Please enter a 10-digit phone number. You can use hyphens or periods to separate numerals, and you can put the area code in parentheses.
Zip code	5-digit Zip code or 9-digit Zip code with a hyphen after the first 5 digits.	Please enter a 5-digit Zip code or a 9-digit Zip code with a hyphen after the first 5 digits.

# Online Admissions and Online Reenrollment Plug-in

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With the Online Admissions and Online Reenrollment Plug-in, you can process the data from your Online Admissions and Online Reenrollment forms. When a website user saves a form on your website, the program stores the data in the website's database. When the user submits the form, the program sends the data to the plug-in, where you can edit it as necessary. You can also search for matching records in The Education Edge for applicants and relationships. When you are satisfied with the data, you can process the form to create and update records in the Admissions Office section of The Education Edge.

From the plug-in, you can also quickly access and manage your online forms, print or access form data, and review payments made through online forms. For more information about how to manage forms, see [Forms on page 6](#).

**Warning:** As an added security measure for hosted Online Admissions and Online Reenrollment users, we removed the embedded Blackbaud NetCommunity links from the Online Admissions and Online Reenrollment Plug-in in The Education Edge. We removed the links because users could manipulate the URL of the embedded links and potentially access unauthorized external sites and harmful content. You can still access the Online Admissions and Online Reenrollment links in Blackbaud NetCommunity *Forms*.

To determine where to store data in The Education Edge, the plug-in uses the mapping schema for the Online Admissions and Online Reenrollment form types. For information about the field mappings between the forms and The Education Edge, see [Online Admissions and Online Reenrollment Field Mapping on page 67](#).

Before you update the plug-in, we recommend you process all the data from your forms. If you do not, you may receive an error the next time you open the plug-in after the upgrade.

**Note:** To install the Online Admissions and Online Reenrollment Plug-in, you must select the appropriate options to install Online Admissions when you install or update Blackbaud NetCommunity. For information about the installation, see the *Infinity Platform Installation and Upgrade Guide*.

## Open the Plug-in

After you install the Online Admissions and Online Reenrollment Plug-in, the Online Admissions and Online Reenrollment links appear on the NetCommunity page in The Education Edge. To access data from online admissions forms in the plug-in, click **Process submitted admissions forms**.

NetCommunity

### Admissions and Reenrollment

[Manage online forms](#)  
[View started and completed forms](#)  
[Process submitted admissions forms](#)  
Downloaded forms to process: 5  
[Process submitted reenrollment forms](#)  
Downloaded forms to process: 5  
[Print or export forms with data](#)  
[Review payments made through online forms](#)  
[View dashboard totals](#)

Settings

Display: Admissions By: Grade level Academic year to calculate: 2012-2013 Filter

Grade level	Forms started	Forms completed	Total applied	Accepted	Accepted still waiting	Accepted coming	Accepted not coming	Wait pooled
Kindergarten	0	0	69	0	37	0	31	1
First Grade	0	0	57	0	37	0	19	2
Second Grade	0	0	44	1	37	6	0	0
Third Grade	0	0	18	0	10	4	1	3
Fourth Grade	0	0	12	1	4	5	1	1
Fifth Grade	0	0	0	0	0	0	0	0

### Students and Parents

#### Profile Updates

Commit changes submitted by parents and students using profile updates on your school's website.

#### Surveys

Process survey responses submitted on your school's website.

### Administration

[Add users to NetCommunity](#)  
Add Applicants, Faculty Access for the Web users and NetClassroom users to NetCommunity.  
Please backup the NetCommunity database before adding users.

[Options](#)  
Define the service URL to use as well as how to import users into Online Campus Community

[Make a suggestion](#)

After you click the link, the plug-in appears. You do not need to enter a user name or password. The plug-in uses your login information for The Education Edge.

**Note:** By default, all users in the Blackbaud NetCommunity supervisor role can access the Online Admissions and Online Reenrollment Plug-in. To provide access to users who are not Blackbaud NetCommunity supervisors, you can create a security group in The Education Edge. For information about security groups in The Education Edge, see the *Administration Guide*.

**Online Admissions and Online Reenrollment**

File Edit Help

Delete Selected Manage Matches Refresh Grid

Submission Information	Match Status	Matching Records
<input type="checkbox"/> <b>Rocko Life Smith</b> Submission date: 01/17/2012 3:34:19 PM Form: OA_HankQG		

Select All View: <All Records> <All Forms>

Page 1 of 1 (1 Records)

Online Admissions and Online Reenrollment

Process Form View Relationship Matches Expand All Collapse All

**Applicant - Applicant Biographical Information**

Name	Form Value	Adjusted Value
First Name	Rocko	Rocko
Middle Name	Life	Life
Last Name	Smith	Smith
Suffix	, Jr.	, Jr.
Preferred Name		
Gender	Male	Male
Social Security Number		

☐ Applicant - Application Information  
☐ Applicant - Applicant Birth Information  
☐ Applicant - Applicant Current School  
☐ Applicant - Applicant Additional Information  
☐ Applicant Address - Applicant Present Address  
☐ Applicant Address - Applicant Contact Information  
☐ Parent/Guardian 1 - Instructions  
☐ Parent/Guardian 1 - Parent/Guardian 1 Biographical Information  
☐ Parent/Guardian 1 - Parent/Guardian 1 Business Information  
☐ Parent/Guardian 1 - Spouse  
☐ Parent/Guardian 2 - Parent/Guardian 2 Biographical Information  
☐ Parent/Guardian 2 - Parent/Guardian 2 Business Information  
☐ Parent/Guardian 2 - Spouse  
☐ Siblings - Applicant Sibling 1  
☐ Siblings - Applicant Sibling 2

From the plug-in, you can manage the admissions forms that users submit on your website. You can edit the data as necessary and search for matching records in The Education Edge for applicants and relationships. When you are satisfied with a form, you can process it to create records in The Education Edge.

For information about how to process data in the plug-in, see [Online Admissions Plug-in on page 48](#).

To process forms, users must have security rights in The Education Edge to create and update records. If you provide access to the Online Admissions and Online Reenrollment Plug-in but do not provide security rights to create and update records, users can view and edit data in the plug-in, but they cannot process forms.

To access data from online reenrollment forms in the plug-in, click **Process submitted reenrollment forms**. After you click the link, the plug-in appears.

Submission Information	Fields with new data	Sections with new data	Fields changed	Sections changed
<b>John Paul</b> Submission date: 01/13/2012 1:14:36 PM Form: HJP_ORE Payment: Waived	0		0	

Name	Record Value	Form Value	Adjusted Value
Record ID	0836	0836	0836
First Name	John	John	John
Middle Name			
Last Name	Paul	Paul	Paul
Suffix			
Nickname			

From the plug-in, you can manage the reenrollment forms that users submit on your website. You can edit the data as necessary and search for matching records in The Education Edge. When you are satisfied with a form, you can process it to update records in The Education Edge.

For information about how to process data in the plug-in, see [Online Reenrollment Plug-in on page 54](#).

## Online Admissions Plug-in

When a website user saves an admissions form, the program stores the data in the website database. When the user submits an admissions form, the program sends the data to the Online Admissions Plug-in. In the plug-in, you can edit the user's data and search for matching records in The Education Edge for the user and any relationships. You can also format how to convert address and name fields. For example, you can convert long name to abbreviation name in address fields, such as Street to St. When you are satisfied with the data, you can process it to create records in the Admissions Office section of The Education Edge.

To access the plug-in, click **Process submitted admissions forms** on the NetCommunity page in The Education Edge. The number below the link indicates how many forms were submitted since you last processed forms on the NetCommunity page.



Online Admissions and Online Reenrollment

File Edit Help

Delete Selected Manage Matches Refresh Grid

Submission Information	Match Status	Matching Records
<input type="checkbox"/> Rocko Life Smith Submission date: 01/17/2012 3:34:19 PM Form: OA_HankQG		

Select All View: <All Records> <All Forms>

Page 1 of 1 (1 Records)

Online Admissions and Online Reenrollment

Process Form View Relationship Matches Expand All Collapse All

**Applicant - Applicant Biographical Information**

Name	Form Value	Adjusted Value
First Name	Rocko	Rocko
Middle Name	Life	Life
Last Name	Smith	Smith
Suffix	, Jr.	, Jr.
Preferred Name		
Gender	Male	Male
Social Security Number		

**Applicant - Application Information**

- Applicant - Applicant Birth Information
- Applicant - Applicant Current School
- Applicant - Applicant Additional Information
- Applicant Address - Applicant Present Address
- Applicant Address - Applicant Contact Information
- Parent/Guardian 1 - Instructions
- Parent/Guardian 1 - Parent/Guardian 1 Biographical Information
- Parent/Guardian 1 - Parent/Guardian 1 Business Information
- Parent/Guardian 1 - Spouse
- Parent/Guardian 2 - Parent/Guardian 2 Biographical Information
- Parent/Guardian 2 - Parent/Guardian 2 Business Information
- Parent/Guardian 2 - Spouse
- Siblings - Applicant Sibling 1
- Siblings - Applicant Sibling 2

The plug-in is divided into two grids. In the records grid on the left, an entry appears for each unprocessed form that a user submits on your website. In the form data grid on the right, data appears for the form you select in the records grid.

In the records grid, each entry displays the name of the user, the date the form was submitted, and the type of form. In this grid, you can delete forms, manage matching records from The Education Edge, and refresh the grid with forms submitted after you opened the plug-in. After the plug-in searches for matching records, matches appear under **Matching Records**.

To edit the data on a form, select it in the records grid. The user's data appears in the form data grid. In this grid, you can edit responses for each field on the form. The form data grid is divided into the same sections that appear in the form. When you select a section, the grid displays the fields for that section and hides all other fields. The **Name** column displays the field names, and the **Value** column displays the data that users submit. You can edit the entries as necessary. For example, you can correct typos or change entries on behalf of users after they submit forms.

The toolbar in the form data grid allows you to process forms and view matches for the user's relationships. When you are satisfied with the form, you can process it to create and update records in The Education Edge. To process a form, click **Process Form**. The plug-in creates or updates records in The Education Edge for the user and any relationships.

**Warning:** Before you process forms, we recommend you close all records in The Education Edge. When the plug-in processes forms with matching records, it updates existing records in The Education Edge. However, if a matching record is open, the update may fail.

## Records Grid

In the Online Admissions Plug-in, an entry appears in the records grid for each unprocessed form that a user submits on your website. Each entry displays the name of the user, the date the form was submitted, and the type of form. After you search for matching records, matches appear under **Matching Records**.

To view and edit the data on a form, select it in the records grid. In the form data grid, the form entries appears. You can edit the data for each field in the form.

Also, in the **Match Status** column, if a user conflict exists, from the menu, select **Edit, Fix user conflict**. The Fix user conflict screen appears for you to select which record to link the user and the completed form.

The toolbar for the records grid allows you to delete forms, manage matching records, and refresh the grid.

- To delete a form, select its checkbox and click **Delete Selected**.
- To search for matching records in The Education Edge, select its checkbox and click **Manage Matches, Calculate Matches**. The plug-in uses the business rules for duplicate user criteria to search the The Education Edge for records that match the data from the forms in the records grid. Any matches appear under **Matching Record**. For information about how to manage matching records, see [Manage Matches on page 58](#).
- To update the records grid with forms submitted after you open the plug-in, click **Refresh Grid**.

Below the records grid, you can select all the forms and filter the forms in the grid.

- To select all forms in the records grid, select **Select All**.

- To filter the entries in the records grid, use the **View** fields. In the first field, select whether matching records exist for the forms. In the second field, select the type of form to include.

## Form Data Grid

In the Online Admissions Plug-in, you can edit the data that applicants submit. In the records grid, select the form. Data from the form appears in the form data grid, and you can edit entries for each field on the form. The form data grid is divided into the same sections as the form. When you select a section, the grid displays the fields for that section and hides all other fields.

Also, if you set format options to convert name and address data, you can view how the data converts before you process the form.

The screenshot shows the 'Online Admissions and Online Reenrollment' application window. The 'Records Grid' on the left lists a submission for 'Allen Apple' with the submission date '12/18/2009 1:15:23 PM' and form 'Online Admissions 1 Build 410'. The 'Form Data Grid' on the right, outlined in red, displays the form fields and their values for this submission.

Name	Value
Title	
Last Name	Apple
First Name	Allen
Nickname	
Gender	Male
Is Latino Hispanic	<input checked="" type="checkbox"/>
Ethnicity	
Social Security Number	345-24-6583
Requests No Email	<input type="checkbox"/>
Religion	
Parents Are	
School Year Apply	Pepperworth Middle School: 2
Grade Level Apply	
Application Type	
Wants School Insurance	<input type="checkbox"/>

Under **Name**, the field names from the form appear, under **Form Value**, the data that users submit appears, and under **Adjusted Value**, the adjusted data based on the format options you set appear. You can edit the entries as necessary. For example, you can correct typos or change entries on behalf of users after they submit forms.

The plug-in automatically saves changes to the form data grid. If you change a form and then select a different form or close the plug-in, the changes are saved when you return. However, the changes are not saved back to *Forms* on the website. That version of the form retains the original responses. If you need to restore an user's original responses, you can delete the form in the plug-in and submit it again from the Data tab in *Forms*.

**Warning:** If an Online Admissions form includes the **Social Security Number** field, the user who processes forms must have security rights to edit personal information. To grant these rights to the user's security group, select **Personal Information** in the **Privileges** box of the Group screen. For more information about security rights in The Education Edge, see the *Administration Guide*.

When you process a form, the plug-in creates and updates records in The Education Edge. The plug-in uses the data on the form data grid to create or overwrite entries for the corresponding fields in The Education Edge. However, if a user leaves fields blank in the form, they do not overwrite existing data. For information about the field mappings between forms and The Education Edge, see [Online Admissions and Online Reenrollment Field Mapping on page 67](#).

**Note:** When you process a form and an applicant has a matching record in your database, the plug-in does not delete existing addresses or contact information. If the data in the form matches the record, the plug-in does not create an entry. If the data does not match, the plug-in creates an entry that takes precedence for that address type or phone type. The existing data becomes a secondary address or phone type. For example, if an applicant submits a home address that does not match the primary home address in your records, the plug-in creates a home address entry and marks it as primary. The original address remains on the record but is no longer the primary home address.

The toolbar for the form data grid allows you to process the form and to view matches for the relationships. When you are satisfied with a form, you can process it to create and update records in The Education Edge. To process a form, click **Process Form**. The plug-in creates or updates records in The Education Edge.

## Process Forms

After you edit a form's data and manage the matching records, you can create or update records in The Education Edge. To move data from the plug-in to The Education Edge, select the form in the records grid. In the form data grid, click **Process Form**.

**Tip:** When you process a form in the plug-in, it must conform to your required field settings in The Education Edge. If a field is required to create a record in The Education Edge, the form must include a value for that field.

The plug-in creates records or updates matching records in The Education Edge and updates the records grid so that the form no longer appears.

**Warning:** Before you process forms, we recommend you close all records in The Education Edge. When the plug-in processes forms with matching records, it creates records in The Education Edge and merges them with existing records. However, if a matching record is open, the merge fails and duplicate records exist in your database.

## How the Plug-in Processes Matching Records

When you process a form, the plug-in creates or updates records in The Education Edge. You can search for and select matching records when you edit a form in the plug-in, but the plug-in also calculates matching records when you process the form. The plug-in uses the business rules for duplicate applicant criteria to search The Education Edge for matching records. You can map the data from the form to the matching record, or you can remove the match.

**Note:** To manually search The Education Edge for matching records, click **Manage Matches**, **Calculate Matches** in the toolbar. The plug-in searches the database for possible matches for the applicant and the applicant's relationships. For more information, see [Calculate Matches on page 58](#).

If a form includes matching records, the plug-in uses the Merge functionality in The Education Edge to combine the data from the new record and the existing record to create a single record. The plug-in can search for matching records for the applicant, relationships, organizations, and roommates. For example, the plug-in can search for individual records that match the applicant's parents and for organization records that match the schools the applicant attended. For more information about the merge process in The Education Edge, see the *Administration Guide*.

When the merge process combines data from a form with an existing record, the data from the form takes precedence and overwrites data on the existing record. For example, if an applicant submits a name that is different than the name on the existing record, the new name overwrites the existing name in your database. However, if an applicant leaves fields blank in the form, the blank fields do not overwrite existing data.

If you process a form and the plug-in finds a matching individual record for an applicant, the plug-in converts the individual record to an applicant record. But if it finds a matching applicant record, no conversion takes place.

**Note:** In The Education Edge, when you convert an individual record to an applicant record, the program assigns a new identification number. However, the Online Admissions and Online Reenrollment Plug-in does not assign new identification numbers. When a user with an existing individual record submits an Online Admissions form, the plug-in converts the individual record to an applicant record but retains the individual's identification number.

## How the Plug-in Processes Shared Addresses

The Online Admissions and Online Reenrollment form types include **Same Address As Applicant** and **Same Address As Applicant** checkboxes to allow you share addresses between the applicants or students and parents or other individuals. When a user selects this checkbox or you select it in the plug-in, the address fields are disabled in the plug-in. This includes the **Country**, **Address**, **City**, **State**, and **Zip code** fields. If the applicant enters address information and then selects the checkbox, the plug-in ignores the data in the address fields and shares the applicant's address information when you process the form. Likewise, if you select the checkbox in the plug-in, the plug-in ignores any data in the address fields.

In addition to address fields, the checkbox allows you to share phone numbers if you allow the phone type to be shared in The Education Edge. When a user selects the checkbox or you select it in the plug-in, the plug-in compares the contact information for the applicant to the contact information for the parent or other individual. If the values match and the phone type can be shared, the plug-in shares the phone number when you process the form. However, if the values don't match or either field is blank, the plug-in does not share the phone number. For more information about shared settings for phone types in The Education Edge, see the *Configuration Guide*.

With shared address records, any change to one record is reflected on the other record. For more information about shared addresses in The Education Edge, see the *Records Guide*.

**Warning:** While the plug-in removes the entry in the records grid after you process a form, it does not remove the instance of the form in *Forms* on the website. If you delete a form in the plug-in, you can resubmit it from the Data tab in *Forms*. To ensure that you do not process forms multiple times, we recommend that you periodically delete entries in *Forms* after you process them in the plug-in. For information about the *Forms*, see the [Forms on page 6](#).

## View Relationship Matches

When the plug-in searches The Education Edge for matching records, it searches for matches for relationships as well as for applicants. For example, if an applicant enters data about parents or siblings, the plug-in searches the database for records that match the relationships. As with the matching records for the applicant, the plug-in uses the business rules for duplicate applicant criteria when it compares records from The Education Edge to relationships. For information about the business rules for duplicate applicant criteria in The Education Edge, see the *Configuration Guide*.

To view the matching records for relationships, select the form in the records grid. In the form data grid, click **View Relationship Matches** in the toolbar. The Relationship Matches screen appears. On this screen, you can manage the connections between an applicant's relationships and existing records in The Education Edge. For more information about relationship matches, see [View Relationship Matches on page 61](#).

## Add Code Table Entries

The mapped fields on your Online Admissions and Online Reenrollment forms use the same code tables as their corresponding fields in The Education Edge. This allows website users to select the same options as in The Education Edge. However, you can edit field properties to allow users to enter options that are not in the code tables, and in the plug-in, you can enter your own options. When you process forms with these new entries, you can add them to the code tables in The Education Edge.

To enter a new value for a code table in the plug-in, select the field in the **Value** column of the form data grid. You can edit the values users enter or enter your own options. You can only enter new options in fields where you are able to edit the code table in The Education Edge.

Before you can process a form with new code table entries, you must add the entries to the code tables. To do this, select the form in the records grid and click **Process Form**. The Add Code Table Entries screen appears. This screen lists all new code table entries and includes the code tables to modify and the steps and sections where the field appears on the online form. To add entries to the code table, click **Process**. To edit entries, click **Cancel** and edit the field in the **Value** column of the form data grid.

## Online Reenrollment Plug-in

When a website user saves a reenrollment form, the program stores the data in the website database. When the user submits the form, the program sends the data to the Online Reenrollment Plug-in. In the plug-in, you can edit the user's data and search for matching records in The Education Edge for the user and any relationships. You can also format how to convert address and name fields. For example, you can convert long name to abbreviation name in address fields, such as Street to St. When you are satisfied with the data, you can process it to create or update records in The Education Edge.

To access the plug-in, click **Process submitted reenrollment forms** on the NetCommunity page in The Education Edge. The number below the link indicates how many forms were submitted since you last processed forms on the NetCommunity page.

**Online Admissions and Online Reenrollment**

File Edit Help

X Delete Selected Manage Matches Refresh Grid

Submission Information	Fields with new data	Sections with new data	Fields changed	Sections changed
<input checked="" type="checkbox"/> Michael Richard Andrews Submission date: 01/30/2012 3:58:20 PM Form: Brent ORE Rules Payment: Completed	0		0	
<input type="checkbox"/> Michael Richard Andrews Submission date: 02/01/2012 9:43:43 AM Form: Brent ORE Rules Payment: Waived	2	Student Medical Information - New Allergies or Medical Conditions	0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:39:48 PM Form: HJP_ORE Payment: Waived	0		0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:42:21 PM Form: HJP_ORE Payment: Waived	1	Student Information - Student Progression Entries	1	Student Information - Student Progression Entries

Select All View: <All Forms>

Page 1 of 1 (6 Records)

Process Form View Relationship Matches Expand All Collapse All

**Student Information - Biographical**

Name	Record Value	Form Value	Adjusted Value
Title			
First Name	Michael	Michael	Michael
Middle Name	Richard	Richard	Richard
Last Name	Andrews	Andrews	Andrews
Suffix			
Suffix2			
Nickname	Mike	Mike	Mike
Birth State	South Carolina	South Carolina	South Carolina
Birth Country	United States	United States	United States

Online Admissions and Online Reenrollment

The plug-in is divided into two grids. In the records grid on the top, an entry appears for each unprocessed form that a user submits on your website. In the form data grid on the bottom, data appears for the form you select in the records grid.

In the records grid, each entry displays the name of the user, the date the form was submitted, the form name, and the payment status. You can also quickly see which sections contain new data, how many fields have been changed compared to what currently exists on the record, and which sections contain the changed fields.

In this grid, you can delete forms, manage matching records from The Education Edge, and refresh the grid with forms submitted after you opened the plug-in.

To edit the data on a form, select it in the records grid. The user's data appears in the form data grid. In this grid, you can edit responses for each field on the form. The form data grid is divided into the same sections that appear in the form. When you select a section, the grid displays the fields for that section and hides all other fields. However, you can also use the **Expand All** and **Collapse All** buttons to show or hide all the sections. The **Name** column displays the field names, the **Record** column displays what appears on the record in The Education Edge, and the **Form Value** column displays the data that users submit. In the **Adjusted Value** column, you can edit the entries as necessary. For example, you can correct typos or change entries on behalf of users after they submit forms.

The toolbar in the form data grid allows you to process forms and view matches for the user's relationships. When you are satisfied with the form, you can process it to create and update records in The Education Edge. To process a form, click **Process Form**. The plug-in creates or updates records in The Education Edge for the user and any relationships.



**Warning:** Before you process forms, we recommend you close all records in The Education Edge. When the plug-in processes forms with matching records, it updates existing records in The Education Edge. However, if a matching record is open, the update may fail.

## Records Grid

In the Online Reenrollment Plug-in, an entry appears in the records grid for each unprocessed form that a user submits on your website. Each entry displays the name of the user, the date the form was submitted, the name of the form, and the payment status. For each submitted entry, you can also see the number of fields with new or changed data and the names of the form sections with new or changed data.

The screenshot shows the 'Online Admissions and Online Reenrollment' application window. The top toolbar includes 'File', 'Edit', and 'Help'. Below the toolbar is a menu bar with 'Delete Selected' and 'Manage Matches'. A 'Refresh Grid' button is in the top right. The main area is a table with the following columns: 'Submission Information', 'Fields with new data', 'Sections with new data', 'Fields changed', and 'Sections changed'. The table contains four rows of data for different users and forms. Below the table is a 'View: <All Forms>' dropdown and a 'Page 1 of 1 (6 Records)' indicator. The bottom section shows a detailed view of a form titled 'Student Information - Biographical' with fields for Name, Title, First Name, Middle Name, Last Name, Suffix, Suffix2, Nickname, Birth State, and Birth Country, each with a 'Record Value', 'Form Value', and 'Adjusted Value'.

Submission Information	Fields with new data	Sections with new data	Fields changed	Sections changed
<input checked="" type="checkbox"/> Michael Richard Andrews Submission date: 01/30/2012 3:58:20 PM Form: Brent ORE Rules Payment: Completed	0		0	
<input type="checkbox"/> Michael Richard Andrews Submission date: 02/01/2012 9:43:43 AM Form: Brent ORE Rules Payment: Waived	2	Student Medical Information - New Allergies or Medical Conditions	0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:39:48 PM Form: HJP_ORE Payment: Waived	0		0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:42:21 PM Form: HJP_ORE Payment: Waived	1	Student Information - Student Progression Entries	1	Student Information - Student Progression Entries

Name	Record Value	Form Value	Adjusted Value
Title			
First Name	Michael	Michael	Michael
Middle Name	Richard	Richard	Richard
Last Name	Andrews	Andrews	Andrews
Suffix			
Suffix2			
Nickname	Mike	Mike	Mike
Birth State	South Carolina	South Carolina	South Carolina
Birth Country	United States	United States	United States

To view and edit the data on a form, select it in the records grid. In the form data grid, the form entries appears. You can edit the data for each field in the form.

Also, if a user conflict exists, from the menu, select **Edit, Fix user conflict**. The Fix user conflict screen appears for you to select which record to link the user and the completed form.

The toolbar for the records grid allows you to delete forms, manage matching records, and refresh the grid.

- To delete a form, select its checkbox and click **Delete Selected**.



- To view applicant or relationship matches in The Education Edge, select its checkbox and click **Manage Matches**, **View Applicant Matches** or **View Relationship Matches**. For information about how to manage matching records, see [Manage Matches on page 58](#).
- To update the records grid with forms submitted after you open the plug-in, click **Refresh Grid**.

Below the records grid, you can select all the forms and filter the forms in the grid.

- To select all forms in the records grid, select **Select All**.
- To filter the entries in the records grid, use the **View** fields. In the first field, select whether matching records exist for the forms. In the second field, select the type of form to include.

## Form Data Grid

In the Online Reenrollment Plug-in, you can edit the data that students submit. In the records grid, select the form. Data from the form appears in the form data grid, and you can edit entries for each field on the form. The form data grid is divided into the same sections as the form. When you select a section, the grid displays the fields for that section and hides all other fields.

Also, if you set format options to convert name and address data, you can view how the data converts before you process the form.

The screenshot shows the 'Online Admissions and Online Reenrollment' application window. The top menu bar includes 'File', 'Edit', and 'Help'. Below the menu is a toolbar with 'Delete Selected', 'Manage Matches', and 'Refresh Grid' buttons. The main area is divided into two sections. The top section is the 'Records Grid' with columns: 'Submission Information', 'Fields with new data', 'Sections with new data', 'Fields changed', and 'Sections changed'. It lists four records for Michael Richard Andrews and John Paul. The bottom section is the 'Form Data Grid' for the 'Student Information - Biographical' form. It has columns: 'Name', 'Record Value', 'Form Value', and 'Adjusted Value'. The 'Name' column lists fields like Title, First Name, Middle Name, Last Name, Suffix, Suffix2, Nickname, Birth State, and Birth Country. The 'Record Value' column shows the data from the linked student record, and the 'Form Value' column shows the data submitted by the user.

Submission Information	Fields with new data	Sections with new data	Fields changed	Sections changed
<input checked="" type="checkbox"/> Michael Richard Andrews Submission date: 01/30/2012 3:58:20 PM Form: Brent ORE Rules Payment: Completed	0		0	
<input type="checkbox"/> Michael Richard Andrews Submission date: 02/01/2012 9:43:43 AM Form: Brent ORE Rules Payment: Waived	2	Student Medical Information - New Allergies or Medical Conditions	0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:39:48 PM Form: HJP_ORE Payment: Waived	0		0	
<input type="checkbox"/> John Paul Submission date: 02/06/2012 4:42:21 PM Form: HJP_ORE Payment: Waived	1	Student Information - Student Progression Entries	1	Student Information - Student Progression Entries

Select All View: <All Forms>

Page 1 of 1 (6 Records)

Name	Record Value	Form Value	Adjusted Value
Title			
First Name	Michael	Michael	Michael
Middle Name	Richard	Richard	Richard
Last Name	Andrews	Andrews	Andrews
Suffix			
Suffix2			
Nickname	Mike	Mike	Mike
Birth State	South Carolina	South Carolina	South Carolina
Birth Country	United States	United States	United States

Under **Name**, the field names from the form appear, under **Record Value** the data from the linked student record in The Education Edge appears, under **Form Value**, the data that users submit appears,

and under **Adjusted Value**, the adjusted data based on the format options you set appear. You can edit the entries as necessary. For example, you can correct typos or change entries on behalf of users after they submit forms. When you review the entries, sections with new or changed field information highlight. Sections with new data highlight in green. Sections with data that is different from the value on the record in The Education Edge highlight in yellow.

The plug-in automatically saves changes to the form data grid. If you change a form and then select a different form or close the plug-in, the changes are saved when you return. However, the changes are not saved back to *Forms* on the website. That version of the form retains the original responses. If you need to restore an user's original responses, you can delete the form in the plug-in and submit it again from the Data tab in *Forms*.

When you process a form, the plug-in creates and updates records in The Education Edge. The plug-in uses the data on the form data grid to create or overwrite entries for the corresponding fields in The Education Edge. However, if a user leaves fields blank in the form, they do not overwrite existing data. For information about the field mappings between forms and The Education Edge, see [Online Admissions and Online Reenrollment Field Mapping on page 67](#).

The toolbar for the form data grid allows you to process the form and to view matches for the relationships. When you are satisfied with a form, you can process it to create and update records in The Education Edge. To process a form, click **Process Form**. The plug-in creates or updates records in The Education Edge.

## Manage Matches

In the toolbar for the records grid, you can manage matching records for your forms. The plug-in uses business rules for duplicate user criteria to search The Education Edge for records that match the forms in the records grid. For information about the business rules for duplicate user criteria in The Education Edge, see the *Configuration Guide*.

After you search for matching records, you can view matches, select whether to map data from the form to a matching record, remove the link between a form and a matching record, and manage matching records for relationships. If the plug-in does not find matching records, you can also search the database to create matching relationships between an applicant and a record in The Education Edge.

**Warning:** When you process a form with matching records, the plug-in updates the existing record's corresponding fields in The Education Edge with data from the form. For more information about how the plug-in processes matching records, see [Process Forms on page 52](#).

## Calculate Matches

To determine whether records in The Education Edge match a form in the records grid, click **Manage Matches**, **Calculate Matches** in the toolbar. The plug-in searches the database for possible matches for the user and any relationships. After the search, any matches appear under **Matching Records** in the records grid and on the Relationship Matches screen.

**Note:** You use **Manage Matches**, **Calculate Matches** to manually search The Education Edge for matching records, but the plug-in also automatically calculates matching records when you process forms. For more information, see [Process Forms on page 52](#).

The plug-in uses business rules for duplicate user criteria to search The Education Edge for records that match the forms in the records grid. For information about the business rules for duplicate user criteria in The Education Edge, see the *Configuration Guide*.

## View Applicant Matches

When the plug-in finds a matching record, you can view the matching record to compare it to the applicant's data. When the plug-in finds multiple matches, you can view each record and select the one to map to the applicant.

When the plug-in finds a single match for an applicant, it automatically maps the applicant to the matching record. To view the record, select the applicant in the records grid and click **Manage Matches**, **View Applicant Match(es)**. The record from The Education Edge appears. You can compare it to the form data grid to determine whether to update the record with the applicant's data. To remove the link between the applicant and the record, click **Manage Matches**, **Remove Applicant Match(es)**.

When the plug-in finds multiple matching records for an applicant, it does not map the data to a record. Each possible match appears in the **Matching Record** column. To map the applicant to a matching record, you must select it. To view the matching records and select the match, select the applicant in the records grid and click **Manage Matches**, **View Applicant Match(es)**. The Multiple Matches screen appears.

Multiple Matches

Multiple matches for Do C Allen found. Please specify if any of these matches are correct.

Open Record

Match To?	Name	Type	Record ID
<input type="checkbox"/>	Mr. Douglas Allen	Individual	IND184
<input type="checkbox"/>	Mrs. Dorothy Kathleen Allen	Individual	IND185

Do C Allen will not be matched to an existing record.

OK Cancel

- To view a matching record, select it in the grid and click **Open Record**. The record from The Education Edge appears.
- To map the applicant to a matching record, select its **Match To?** checkbox and click **OK**. You return to the plug-in, and the other matching records no longer appear in the **Matching Record** column.

**Note:** After you select a matching record, you cannot use the **Calculate Matches** option to restore possible matches. However, to search for matching records in The Education Edge, you can click **Manage Matches, Add a Match to Applicant**. For more information, see [Add a Match to Applicant on page 60](#).

## Remove Applicant Matches

When the plug-in finds matching records in The Education Edge, it displays the matches under **Matching Records** in the records grid. If the plug-in finds a single matching record, it automatically maps the applicant to the matching record so that when you process the form, it merges the applicant data with data from the record. If the plug-in finds multiple matching records, you must select the matching record for the applicant.

If you do not want to map an applicant to a matching record in The Education Edge, you can remove the match from the records grid. To remove the connection between the applicant and the matching record, select the form in the records grid and click **Manage Matches, Remove Applicant Match(es)** in the toolbar. Under **Match Status**, the status is cleared, and under **Matching Records**, all matches are removed.

**Note:** After you remove the matches for an applicant, you cannot use the **Calculate Matches** option to restore the possible matches. However, to search for matching records in The Education Edge, you can click **Manage Matches, Add a Match to Applicant**. For more information, see [Add a Match to Applicant on page 60](#).

## Add a Match to Applicant

If the plug-in fails to find a matching record for an applicant, you can manually search for matching records in The Education Edge. For example, if an applicant enters a nickname in the **First Name** field of the form and your duplicate applicant criteria requires an exact match in this field, the plug-in will not find a matching record. However, if you know a record exists for the applicant, you can search for the record and map the applicant's data to the existing record.

To search for a matching record, select a form in the records grid and click **Manage Matches, Add a Match to Applicant** in the toolbar. On the search screen that appears, enter data for the applicant and click **Find Now** to search The Education Edge. To map the applicant to a record, select it in the grid and click **Open**. The matching record appears in the **Matching Record** column.

Open

Find: Individual Search using query: <Default>

Options

Find Individuals that meet these criteria: ☐ Exact match only

Last name: Affiliation:

First name: Last modified by:

Record ID: Last modified on: any time

SSN:

Hide Filters Clear Filters Previous Filters Filters are not applied Find Now Open Cancel

Press F7 to zoom

The **Add a Match to Applicant** task is disabled for applicants when a matching record already exists in the **Matching Record** column.

## View Relationship Matches

In addition to matching records for applicants in The Education Edge, the plug-in also searches for matching records for relationships. For example, if a form includes data about parents and siblings, the plug-in searches the database for records that match the relationships. As with matching records for applicants, the plug-in uses the business rules for duplicate applicant criteria when it compares records from The Education Edge to relationships on a form. For information about business rules for the duplicate applicant criteria in The Education Edge, see the *Configuration Guide*.

To view matching records for relationships, select the form in the records grid and click **Manage Matches, View Relationship Matches** in the toolbar. The Relationship Matches screen appears. This screen displays the relationships on the form, and after the program calculates matching records, any matches appear under **Matching Record(s)**.

Relationship Matches

Matches for the relationships and education information of adgasg sadgasdga asdgsadg have been found.

View Match(es) Remove Match(es) Add a Match

Application Section	Relationship	Relationship Name	Match Status	Matching Record(s)
Relationship - Mother to Applicant	Mother	sdagsadg asdfghasdfh		
Relationship - Father to Applicant	Father	asdghsdfag asdfsadg		
Relationship - Sibling 1	Aunt	asdgsdsag asdgsad		
Relationship - Sibling 2	Benefit Recipient	sagawds asdgsad		
Relationship - Sibling 3				
Relationship - Sibling 4				
Relationship - Counselor to Current school	Employer	354534		
Relationship - Father to Business	Employee	asdghsadg		
Relationship - Mother to Business	Employee	SADGSDA		
Current School Education	Education	asdgsadg		
Additional Secondary School 1 Education	Education	67687		
Additional Secondary School 2 Education	Education	sdafigsa		
Additional Secondary School 3 Education	Education	sadgsadg		
College 1 Education	Education	asdgsadg		

OK Cancel

From the Relationship Matches screen, you can view matching records, select a match to use when the plug-in finds multiple matches, search The Education Edge for matching records, and remove the connection between a relationship and a matching record. After you edit the relationship matching, click **OK** to save your changes.

- To view the data on a matching record and to select a match to use when the plug-in finds multiple matches, click **View Match(es)**. For a single match, the record from The Education Edge appears. For multiple matches, the Multiple Matches screen appears. To view the data for a matching record from this screen, select it in the grid and click **Open Record**. To map the relationship to a record, select the checkbox in the **Match To?** column and click **OK**. For more information, see [View Applicant Matches on page 59](#).
- To remove the connection between a relationship and a matching record, click **Remove Match (es)**. Under **Match Status**, the status is cleared, and under **Matching Records**, all matches are removed.
- To search for a matching record in The Education Edge, click **Add a Match**. On the search screen that appears, enter data for the relationship and click **Find Now**. To map the applicant to a record, select it in the grid and click **Open**. The matching record appears under **Matching Record(s)**.

## Format Address and Name Fields

From the plug-in task bar, you can set options for how to convert the format of address and name fields. Based on the options you set, the plug-in converts the data in forms before they become records in The Education Edge. For example, you prefer to format your name and address fields all in

uppercase. Based on this option, the forms data converts all name and address fields to uppercase before they become records. After you set up how to convert your form data, current forms not processed and future forms will convert to the new format.

For name and address fields, if you choose to use **Proper Case Capitalization**, the first letter of each word capitalizes and the first letter after an apostrophe capitalizes. However, "of," "the," "and," "or," "a," "an," and "von" will always be lower case.

To format phone fields, in the Registrar's Office, you can edit the **Phone Type** table in *Configuration, Tables*.

You can format the following fields for address abbreviations, such as long name to abbreviation:

- Applicant — Address
- Parents, Individuals — Address
- Medical — Address

You can format the following fields for address and name fields, such as proper case capitalization and uppercase:

- Applicant — Last name, First Name, Middle Name, Nickname, Maiden Name, Address, City, Birth City
- Roommate — Last name, First Name, Middle Name, Nickname
- Organization — Name
- Medical — Physician Name, Health Care Provider, Policy Contact Name, Address, City
- Parents, Individuals — Last name, First Name, Middle Name, Nickname, Maiden Name, Address, City, Birth City

### ➤ Format form data address and name fields

1. On the navigation bar, click NetCommunity. The NetCommunity page appears.
2. Click Admissions and Online Reenrollment. The Online Admissions and Online Reenrollment plug-in appears.
3. On the task bar, select **Edit, Options**. The Edit Options screen appears.
4. Under **Address Abbreviations**, select how to format the form data for address abbreviations.

**Tip:** The pre-populated list of abbreviations provided is based on the United States Postal Service standards.

5. In the grid, edit the long name and abbreviations as needed.
6. Under **Format Address and Name Fields**, select how to format the form data for address and name fields.
7. Under **Colors**, set the colors to use for the form data cells modified by a user, modified by the settings in Edit Options, and those data cells that are read-only.
8. Click **Save**. You return to the plug-in. To see how the data converts with the new options, in the toolbar for the records grid, click **Refresh Grid**.

**Tip:** Form data doesn't convert until you click **Process Form**. However, in the form data grid, before you process a form you can compare the form's original field values to the adjusted value based on the options you set. We recommend you verify information displays correctly before you process the form.

## View Dashboard Statistics

In the Online Admissions and Online Reenrollment plug-in, you can now see statistics on your forms. To view a full screen of the dashboard, click **View dashboard totals**.

**NetCommunity**

**Admissions and Reenrollment**

[Manage online forms](#)  
[View started and completed forms](#)  
[Process submitted admissions forms](#)  
 Downloaded forms to process: 10  
[Process submitted reenrollment forms](#)  
 Downloaded forms to process: 7  
[Print or export forms with data](#)  
[Review payments made through online forms](#)  
[View dashboard totals](#)

**Settings**

Display: Admissions By: School Academic year to calculate: 2013-2014 Filter

School	Forms started	Forms completed	Total applied	Accepted	Accepted still waiting	Accepted coming	Accepted not coming	Wait pooled	ac
Pepperworth Middle School	0	0	0	0	0	0	0	0	
Pepperworth Upper School	1	5	2	0	2	1	0	0	
Pepperworth Lower School	0	0	0	0	0	0	0	0	
Summer Camp	0	0	0	0	0	0	0	0	

**Students and Parents**

**Profile Updates**  
 Commit changes submitted by parents and students using profile updates on your school's website.

**Surveys**  
 Process survey responses submitted on your school's website.

**Administration**

[Add users to NetCommunity](#)  
 Add Applicants, Faculty Access for the Web users and NetClassroom users to NetCommunity.  
 Please backup the NetCommunity database before adding users.

[Options](#)  
 Define the service URL to use as well as how to import users into Online Campus Community

[Make a suggestion](#)

In the **Display** field, if you have both Online Admissions and Online Reenrollment forms, you can select to display the totals for one type of form or the totals for all.

In the **By** field, you can display totals by school or by grade level.

In the **Academic year to calculate** field, select the school year to filter the results.

In the dashboard, for any column with a number other than zero in it, click the number to see the list of students.

To change the dashboard settings, click **Settings**.



**Reenrollment**

☒ Invited back Any student with a student progression entry

☒ Coming back Contract status:

☒ Contract withheld Contract status:

☒ Still waiting Contract status:

☒ Not returning Contract status:

☒ Percentage coming back Coming back column/Invited back column

**Admissions**

☒ Forms started

☒ Forms completed

☒ Total applied Any student with an application in The Education Edge

☒ Accepted Status:

☒ Accepted still waiting Status:

☒ Accepted coming Status:

☒ Accepted not coming Status:

☒ Wait pooled Status:

☒ Wait pool accepted Status:

☒ Wait pool denied Status:

☒ Total coming Status:

☒ Percentage enrolling Total coming column/total accepted column

For applicants, use the  to determine where to count the information

**Totals**

You determine what columns appear for the forms and how many seats are available per grade level.

## Search Forms

On the NetCommunity page in The Education Edge, you can search for a specific user's form. To find a specific user's form, under **Admissions and Reenrollment**, click **Search for a user's form**.

Form first name:	Form last name:	User name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Forms created on:	Form:	
Blank Client Site	All forms	
Form completed:		
Doesn't apply	From: <input type="text"/>	To: <input type="text"/>
Form last accessed:		
Doesn't apply	From: <input type="text"/>	To: <input type="text"/>
<b>Filter</b>		

Enter in the criteria for the form you need to find. Click **Filter**. The forms matching the criteria appear. You can click the form's name to view the form information.

# Online Admissions and Online Reenrollment Field Mapping



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Activity Fields .....	68
Address Fields .....	69
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With *Forms*, you can create and manage online forms to post on your website. In *Forms*, you use the Form Designer to create distinct steps and sections for the online form, insert instructional text and images, and add fields to collect data from website users. For more information about how to create forms, see [Forms on page 6](#).

To map fields from the website to The Education Edge, you must install *Online Admissions*. The Online Admissions and Online Reenrollment form types include pre-mapped field sets that you can add to your forms. In the Form Designer, you place fields on the form and edit their properties as necessary. After users submit forms on your website, you can process their data with the Online Admissions and Online Reenrollment Plug-in and create and update records in the Admissions Office section of The Education Edge.

To determine where data that users submit on a form appears in The Education Edge, refer to the following tables. These tables describe how the fields on forms map to The Education Edge.

**Warning:** If a field is required in The Education Edge, you must include it on your forms and edit the field properties to require users to complete it. Without data from required fields, you cannot successfully process applications in the Online Admissions and Online Reenrollment Plug-in. By default, the **Last name** and **Current status** fields are required in The Education Edge, and the **School apply** field is required when you have multiple schools. You must include these three fields on your Online Admissions forms. If your organization requires additional fields in The Education Edge, you must include them on the form and edit their field properties to require the fields.

# Activity Fields

The Activity field set includes fields that maps to the Activities tab of an applicant record in The Education Edge.

On Online Admissions forms, this field set is only available for the Applicant category.

This field set is not available on Online Reenrollment forms.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Category	Applicant	Activities tab (open Activity screen)	Category
Activity	Applicant	Activities tab (open Activity screen)	Activity
Comments	Applicant	Activities tab (open Activity screen)	Comments

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Rating</b>	Applicant	Activities tab (open Activity screen)	<b>Rating</b>
<b>Role Or Position</b>	Applicant	Activities tab (open Activity screen)	<b>Role/Position</b>
<b>Date From</b>	Applicant	Activities tab (open Activity screen)	<b>Date from</b>
<b>Date To</b>	Applicant	Activities tab (open Activity screen)	<b>Date to</b>
<b>Hours Per Week</b>	Applicant	Activities tab (open Activity screen)	<b>Hours/Week</b>
<b>Weeks Per Year</b>	Applicant	Activities tab (open Activity screen)	<b>Weeks/Year</b>

**Warning:** By default, some Activity fields inherit character limits from The Education Edge. These limits are 255 characters for the **Comments** field, 12 characters for the **Date From** and **Date To** fields, three characters for the **Hours Per Week** field, and two characters for the **Weeks Per Year** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Date From** and **Date To** fields use the U.S. date validator, and the **Hours Per Week** and **Weeks Per Year** fields use the Numeric validator. For information about validators, see [Validators on page 43](#).

## Address Fields

The Address field set includes fields that map to the Addresses tab of an applicant, student, individual, or organization record in The Education Edge. These fields also map to the Bio 1 tab of an applicant, student, or individual record and the Organization tab of an organization record. When you add an Address field set to a form, it includes the Address Details field set.

On an Online Admissions form, you can add this field set to the Applicant, Education Relationship (Organization), Individual Relationship, and Organization Relationship categories. After you add an Address field set, you can add the Attribute and Contact Info field sets to the Address category.

On an Online Reenrollment form, you can add this field set to the Student, Individual Relationship, and Organization Relationship categories. After you add an Address field set, you can add the Contact Info field set to the Address category.

**Note:** The Physician's Address, Primary Insurance Address, and Secondary Insurance Address field sets include a subset of the fields in the Address field set. However, they do not include the Address Details subset, and you cannot add the Attribute field set to them.

**Warning:** When you enter any address information in The Education Edge, the program requires an entry in the **Address** field. For example, to enter a city, you must enter an address. Therefore, to include Address fields on a form, you must include the **Address** field because you need data from required fields to successfully process applications in the Online Admissions and Online Reenrollment Plug-in. To collect data from Address fields but not the **Address** field, you can hide the **Address** field on the form and enter a default value. For information about how to adjust field properties, see [Properties of Form Elements on page 29](#).

**Warning:** When the **Is Primary Address** checkbox from the Address Details field set is selected for an address, the address information also appears on the Bio 1 tab in The Education Edge. If you do not include the checkbox on a form, all addresses will be secondary addresses in The Education Edge. To make an address the primary address by default, you can place the checkbox on the form and then set the default to true and hide it in field properties.

**Note:** The Address field set only includes a **Same Address As Applicant** or **Same Address As Student** field when you add the field set to an Individual Relationship category.

**Note:** The Address field set only includes the **Same Address As Applicant** field when you add the field set to an Individual Relationship category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Country</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Country</b>
<b>Address</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Address</b>
<b>City</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>City</b>
<b>State</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>State</b>
ZIP	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	ZIP

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>NZSuburb</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Suburb</b> (appears only when "New Zealand" is selected in the <b>Country</b> field)
<b>NZCity</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>City</b>
<b>County</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>County</b>
<b>Region</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>Region</b>
<b>CART</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>CART</b>
<b>Same Address As Applicant</b>	Individual	Addresses tab (on Address screen, click <b>Shared Addresses</b> )	<b>This address is shared with</b> grid on the Shared Addresses screen
<b>Same Address As Student</b>	Individual	Addresses tab (on Address screen, click <b>Shared Addresses</b> )	<b>This address is shared with</b> grid on the Shared Addresses screen

**Warning:** By default, some Address fields inherit character limits from The Education Edge. These limits are 150 characters for the **Address** field, 20 characters for the **CART** field, 50 characters for the **City** field, and 10 characters for the **ZIP** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **ZIP** field uses the Zip code validator. For information about validators, see [Validators on page 43](#).

## Address Details Fields

The Address Details field set is a subset of the Address field set. When you add an Address field set to a form, it includes the Address Details field set. This field set includes fields that map to the Addresses tab of an applicant, student, individual, or organization record in The Education Edge. These field also

map to the Bio 1 tab of an applicant, student, or individual record and the Organization tab of an organization record.

**Note:** The Physician's Address, Primary Insurance Address, and Secondary Insurance Address field sets include a subset of the fields in the Address field set, but they do not include the Address Details field set.

**Warning:** When you select **This is a seasonal address** in The Education Edge, the program requires entries in the **from** and **to** fields. Therefore, to include any one of the **Is Seasonal Address**, **Seasonal From**, or **Seasonal To** fields on a form, you must include all three. If you do not include all three and a website user provides data for one of the fields, you cannot successfully process the application in the Online Admissions and Online Reenrollment Plug-in because data from required fields is missing.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Address Type</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Address type</b>
<b>Address Description</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>Description</b>
<b>Is Primary Address</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>Primary address</b>
<b>Valid Address From</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>This is a valid address from</b>
<b>Valid Address To</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>to</b>
<b>Is Seasonal Address</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>This is a seasonal address</b>
<b>Seasonal From</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>from</b> (enabled only when <b>This is a seasonal address</b> is selected)
<b>Seasonal To</b>	Applicant, Student, Individual, or Organization	Addresses tab (on Details tab of Address screen)	<b>to</b> (enabled only when <b>This is a seasonal address</b> is selected)

**Warning:** By default, some Address Details fields inherit character limits from The Education Edge. These limits are 61 characters for the **Address Description** field, 20 characters for the **Valid Address**



**From** and **Valid Address To** fields, and 10 characters for the **Seasonal From** and **Seasonal To** fields. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Valid Address From**, **Valid Address To**, **Seasonal From**, and **Seasonal To** fields use the U.S. date validator. For information about validators, see [Validators on page 43](#).

## Applicant Fields

The Applicant field set includes fields that map to the Bio 1 and Bio 2 tabs of an applicant record in The Education Edge. When you create an Online Admissions form, the Applicant field set appears automatically and it includes the Application and Medical field sets.

On an Online Admissions form, you can add the Activity, Address, Applicant Degree, Attribute, Education Relationship, Financial Aid, Individual Relationship, Notepad, Organization Relationship, Roommate, and Test Score field sets to the Applicant category.

This field set is not available on Online Reenrollment forms.

**Warning:** When you create an applicant record in The Education Edge, the program requires an entry in the **Last name** field. Therefore, you must include the **Last name** field on Online Admissions forms. Without data from required fields, you cannot successfully process applications in the Online Admissions and Online Reenrollment Plug-in.

**Warning:** If you include the **Marital Status** or **Maiden Name** fields on an application but do not enable the corresponding fields in The Education Edge, the Online Admissions and Online Reenrollment Plug-in cannot process the data. To enable the fields in The Education Edge, select **Display Marital Status and Maiden Name fields for Students and Applicants** under **General** in **Configuration, Business Rules**.

**Note:** To allow students to select multiple ethnicities, the **Ethnicity** field changed from a dropdown list to a checkbox list in *Online Admissions 6.25*. If you update from a previous version, the **Ethnicity** field remains a dropdown list on any existing forms where it was in use. To update the field, remove it from the form and add it again.

**Warning:** When you import code table entries from The Education Edge for the **Ethnicity** field, the entries cannot include nonalphabetic characters such as "<," ">," and "&." If a code table entry includes such characters, no label appears on the form with the checkbox for that entry.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Last name	Applicant	Bio 1 tab	Last name
First Name	Applicant	Bio 1 tab	First Name
Middle Name	Applicant	Bio 1 tab	Middle Name

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Title</b>	Applicant	Bio 1 tab	<b>Title 1</b>
<b>Title2</b>	Applicant	Bio 1 tab	<b>Title 2</b>
<b>Suffix</b>	Applicant	Bio 1 tab	<b>Suffix 1</b>
<b>Suffix2</b>	Applicant	Bio 1 tab	<b>Suffix 2</b>
<b>Nickname</b>	Applicant	Bio 1 tab	<b>Nickname</b>
<b>Gender</b>	Applicant	Bio 1 tab	<b>Gender</b>
<b>Social Security Number</b>	Applicant	Bio 1 tab	<b>SSN</b>
<b>Current Grade</b>	Applicant	Bio 1 tab	<b>Current grade</b>
<b>Requests No Email</b>	Applicant	Bio 1 tab	<b>Requests no email</b>
<b>Inquiry Date</b>	Applicant	Bio 1 tab	<b>Inquiry Date</b>
<b>Is Latino Hispanic</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Is Latino/Hispanic?</b>
<b>Ethnicity</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Ethnicity</b>
<b>Religion</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Religion</b>
<b>Church Affiliation</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Church affiliation</b>
<b>Citizenship</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Citizenship</b>
<b>First Language</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>First language</b>
<b>Language Spoken At Home</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Language spoken at home</b>
<b>Years In US</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Years in US</b>
<b>Height</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Height</b>
<b>Weight</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Weight</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Marital Status</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Marital status</b> (appears only when selected under <b>General</b> in <b>Configuration, Business Rules</b> )
<b>Maiden Name</b>	Applicant	Bio 1 tab (click <b>Demographics</b> )	<b>Maiden name</b> (appears only when selected under <b>General</b> in <b>Configuration, Business Rules</b> )
<b>Visa Status</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa status</b>
<b>Visa Number</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa number</b>
<b>Visa Type</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa type</b>
<b>Visa Issued</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa issued</b>
<b>Visa Expires</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa expires</b>
<b>Passport Number</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Passport number</b>
<b>Passport Expires</b>	Applicant	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Passport expires</b>
<b>In-State Resident</b>	Applicant	Bio 2 tab	<b>In-state resident</b>
<b>Resident Years</b>	Applicant	Bio 2 tab	<b>for ____ year(s)</b> (enabled only when <b>In-state resident</b> is selected)
<b>Resident Months</b>	Applicant	Bio 2 tab	<b>____ month(s)</b> (enabled only when <b>In-state resident</b> is selected)

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Resident County</b>	Applicant	Bio 2 tab	<b>in ____ county</b> (enabled only when <b>In-state resident</b> is selected)
<b>Bus Route</b>	Applicant	Bio 2 tab	<b>Bus route</b>
<b>District</b>	Applicant	Bio 2 tab	<b>District</b>
<b>Birth Date</b>	Applicant	Bio 2 tab	<b>Birth date</b>
<b>Birth City</b>	Applicant	Bio 2 tab	<b>City</b>
<b>Birth City NZ</b>	Applicant	Bio 2 tab	<b>City</b>
<b>Birth State</b>	Applicant	Bio 2 tab	<b>State</b>
<b>Birth Suburb</b>	Applicant	Bio 2 tab	<b>Suburb</b> (appears only when "New Zealand" is selected in the <b>Country</b> field)
<b>Birth Country</b>	Applicant	Bio 2 tab	<b>Country</b> (appears only when certain countries are selected in the <b>Country</b> field)
<b>Birth County</b>	Applicant	Bio 2 tab	<b>County</b>
<b>Residence Hall</b>	Applicant	Bio 2 tab	<b>Residence hall</b> (appears only when Residence Life is installed)
<b>Private Room</b>	Applicant	Bio 2 tab	<b>Private room</b> (appears only when Residence Life is installed)
<b>Source</b>	Applicant	Bio 2 tab	<b>Source</b>
<b>Contact Method</b>	Applicant	Bio 2 tab	<b>Contact method</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Parents Are	Individual	Relationships tab	Determines relationship between the individual records for the parents. Relationship is displayed in the <b>Relationship</b> and <b>Reciprocal Relationship</b> columns on the parent records.

**Warning:** By default, some Applicant fields inherit character limits from The Education Edge. These limits are 50 characters for the **First Name**, **Maiden Name**, **Middle Name**, and **Nickname** fields; 12 characters for the **Height**, **Passport Expires**, **Social Security Number**, **Visa Expires**, **Visa Issued**, and **Weight** fields; 60 characters for the **Passport Number**, **Visa Number**, and **Birth City** fields; three characters for the **Years In US** and **Resident Years** fields; 100 characters for the **Last name** field; 11 characters for the **Birth Date** field; and two characters for the **Resident Months** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Passport Expires**, **Visa Expires**, **Visa Issued**, and **Birth Date** fields use the U.S. date validator, and the **Social Security Number** field uses the Social Security number validator. Also, the **Resident Months** and **Resident Years** fields use the Numeric validator, and the **Weight** and **Years In US** fields use the Numeric with decimals validator. For information about validators, see [Validators on page 43](#).

## Applicant Degree Fields

The Applicant Degree field set includes fields that map to the Bio 1 tab of an applicant record in The Education Edge.

On Online Admissions forms, this field set is only available for the Applicant category.

This field set is not available on Online Reenrollment forms.

**Warning:** The Applicant Degree fields only map to corresponding fields in Blackbaud Student Information System. You should not include the fields on applications that map to The Education Edge.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Degree Sought</b>	Applicant	Bio 1 tab (click <b>Degrees</b> )	<b>Degree sought</b>
<b>Major Or Minor Interests</b>	Applicant	Bio 1 tab (click <b>Degrees</b> )	<b>Major/Minor Interests</b> (enabled only when <b>Degree sought</b> is selected)
<b>Concentration Or Option Interests</b>	Applicant	Bio 1 tab (click <b>Degrees</b> )	<b>Concentration/Option Interests</b> (enabled only when <b>Major/Minor Interests</b> is selected)

## Application Fields

The Application field set is a subset of the Applicant field set. When you add an Applicant field set to a form, it includes the Application field set. It set includes fields that map to the Applications tab of an applicant record in The Education Edge.

The **Application Type**, **School Apply**, **Year Apply**, **Grade Level Apply**, **Current Status**, **Status Date**, and **Status Reason** fields also map to the Bio 1 tab of an applicant record

This field set is not available on Online Reenrollment forms.

**Warning:** When you create an applicant record in The Education Edge, the program requires entries in the **School apply**, **Grade left**, and **Current status** fields. Therefore, you must include the corresponding fields on your Online Admissions form. Without data from required fields, you cannot successfully process applications in the Online Admissions and Online Reenrollment Plug-in. However, if you do not want to collect this data from applicants, you can hide the fields on the form and enter default values. For information about how to adjust these field properties, see [Properties of Form Elements on page 29](#).

**Warning:** The **Grade Level Apply**, **Grade Enrolled**, and **Grade Left** fields only map to corresponding fields in The Education Edge. If you include **Grade Level Apply** on applications that map to Blackbaud Student Information System, you will receive an error when you process applications in the Online Admissions and Online Reenrollment Plug-in. We also recommend that you do not include **Grade Enrolled** and **Grade Left** fields on applications that map to Blackbaud Student Information System.

**Note:** The **School Year Apply** field presents applicants with the options available in **Configuration, Academic Years** in The Education Edge. The selection users make in this field maps to both the **School apply** and **Year apply** fields.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Application Date	Applicant	Applications tab	Application date
School Year Apply	Applicant	Applications tab	School apply and Year apply
Grade Level Apply	Applicant	Applications tab	Grade apply
Term Apply	Applicant	Applications tab	Term apply
Application Type	Applicant	Applications tab	Application type
Board Type	Applicant	Applications tab	Board type apply
Date Enrolled From	Applicant	Applications tab	Date enrolled from
Date Enrolled To	Applicant	Applications tab	to
Grade Enrolled	Applicant	Applications tab	Grade enrolled
Graduation Date	Applicant	Applications tab	Graduation date
Class Of	Applicant	Applications tab	Class of
Grade Left	Applicant	Applications tab	Grade left
Reason Left	Applicant	Applications tab	Reason left
Current Status	Applicant	Applications tab	Current status
Status Date	Applicant	Applications tab	Status date
Status Reason	Applicant	Applications tab	Status reason
Geographic Market	Applicant	Applications tab	Geographic market

**Warning:** By default, the **Class of** field inherits a four-character limit from The Education Edge. If you increase the character limit in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Application Date**, **Date Enrolled From**, **Date Enrolled To**, and **Graduation Date** fields use the U.S. date validator, and the **Class Of** field uses the Numeric validator. For information about validators, see [Validators on page 43](#).

## Attribute Fields

The Attribute field set includes fields that map to the Attributes tab of an applicant, student, individual, or organization record in The Education Edge.

On an Online Admissions form, you can add this field set to the Applicant, Address, Education Relationship, Education Relationship (Organization), Financial Aid, Individual Relationship, and Organization Relationship categories.

On an Online Reenrollment form, you can add this field set to the Student category.

When you add an Attribute field set to a form, you must select an attribute type. The record type determines which attribute types are available. For example, when you add an Attribute field set to the Applicant category, you select from the attribute types for applicant records in *Configuration* in The Education Edge. For information about attributes in The Education Edge, see the *Configuration Guide*.

**Warning:** To ensure that you do not delete attribute information in the Online Admissions and Online Reenrollment Plug-in when you match to record of a different type, the same attributes must exist for both record types. For example, you can match an individual record from a form to a faculty record in the database. If an attribute type exists for individual records in *Configuration* but not for faculty records, the plug-in will not add the attribute to the faculty record when you process the transaction.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Attribute type	Applicant, Student, Individual, or Organization	Attributes tab	<b>Attribute Type</b>
<b>Description</b>	Applicant, Student, Individual, or Organization	Attributes tab	<b>Description</b>
<b>Comments</b>	Applicant, Student, Individual, or Organization	Attributes tab	<b>Comments</b>

**Warning:** By default, the **Comments** field inherits a 50-character limit from The Education Edge. If you increase the character limit in the Form Designer, you may lose data that website users submit.

## Contact Info Fields

The Contact Info field set includes fields that map to the Addresses tab of an applicant, student, individual, or organization record in The Education Edge. These field also map to the Bio 1 tab of an applicant, student, or individual record and the Organization tab of an organization record.

On an Online Admissions form, you can add this field set to the Address, Physician’s Address, Primary Insurance Address, and Secondary Address Insurance categories.

On an Online Reenrollment form, you can add this field set to the Address, Physician’s Address, Primary Insurance Address, and Secondary Address Insurance categories.



Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Contact Type</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Contact Type</b>
<b>Contact Number</b>	Applicant, Student, Individual, or Organization	Addresses tab (on General tab of Address screen)	<b>Contact Number</b>

**Warning:** By default, the **Contact Number** field inherits a 50-character limit from The Education Edge. If you increase the character limit in the Form Designer, you may lose data that website users submit.

## Education Relationship Fields

The Education Relationship field set is a subset of the Education Relationship (Organization) field set. It includes fields that map to the Education tab of an applicant record in The Education Edge. When you add the Education Relationship field set to a form, the Education Relationship field set appears as a subset of the Education Relationship (Organization) category.

On an Online Admissions form, you can add the Attribute and Notepad field sets to the Education Relationship category.

This field set is not available on Online Reenrollment forms.

**Warning:** The **Major** field only maps to the corresponding field in Blackbaud Student Information System. You should not include the field on applications that map to The Education Edge.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Record Type	The Education Edge Field
<b>Education Type</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Education type</b>
<b>Feeder School</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Feeder school</b>
<b>Date Enrolled From</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Date enrolled from</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Record Type	The Education Edge Field
<b>Date Enrolled To</b>	Applicant	Education tab (on Education tab of Education screen)	<b>to</b>
<b>Grade From</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Grade from</b>
<b>Grade To</b>	Applicant	Education tab (on Education tab of Education screen)	<b>to</b>
<b>Reason Left</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Reason left</b>
<b>School Status</b>	Applicant	Education tab (on Education tab of Education screen)	<b>School status</b>
<b>Graduation Date</b>	Applicant	Education tab	<b>Graduation date</b>
<b>Class Of</b>	Applicant	Education tab (on Education tab of Education screen)	<b>Class of</b>
<b>GPA</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>GPA</b>
<b>Class Rank</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>Class rank</b>
<b>Class Rank Out Of</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>out of</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Record Type	The Education Edge Field
<b>Credits Awarded</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>Credits awarded</b>
<b>Credits Awarded Out Of</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>out of ____ attempted</b>
<b>Degree Or Diploma</b>	Applicant	Education tab (on Performance History tab of Education screen)	<b>Diploma</b>
<b>Major</b>	Applicant	Education (on Performance History tab of Education screen) tab	<b>Major</b>

**Warning:** By default, some Education Relationship fields inherit character limits from The Education Edge. These limits are 100 characters for the **Education Type** field; 12 characters for the **Date Enrolled From**, **Date Enrolled To**, and **Graduation Date** fields; nine characters for the **Class Rank**, **Class Rank Out Of**, **Credits Awarded**, and **Credits Awarded Out Of** fields; 16 characters for the **GPA** field; and four characters for the **Class of** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Date Enrolled From**, **Date Enrolled To**, and **Graduation Date** fields use the U.S. date validator, the **Class Of**, **Class Rank**, and **Class Rank Out Of** fields use the Numeric validator, and the **GPA**, **Credits Awarded**, and **Credits Awarded Out Of** fields use the Numeric with decimals validator. For information about validators, see [Validators on page 43](#).

## Education Relationship (Organization) Fields

The Education Relationship (Organization) field set includes fields that map to the Organization tab of an organization record in The Education Edge. When you add the Education Relationship field set to a form, the Education Relationship (Organization) category includes the Education Relationship field set.

On an Online Admissions form, this field set is only available for the Applicant category. You can add the Address, Attribute, Individual Relationship, Notepad, and Organization Relationship field sets to the Education Relationship (Organization) category.

This field set is not available on Online Reenrollment forms.

The **Name**, **Type**, and **GPAScale** fields also map to the Education tab of applicant records. The **Name** and **Type** fields map to the **School name** and **Organization type** field on the Education tab of the Education screen. The **GPAScale** field maps to the **GPA** field on the Performance History tab.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Name</b>	Organization	Organization tab	<b>Name</b>
<b>Classification</b>	Organization	Organization tab	<b>Classification</b>
<b>Type</b>	Organization	Organization tab	<b>Type</b>
<b>Accreditation</b>	Organization	Organization tab	<b>Accreditation</b>
<b>Source</b>	Organization	Organization tab	<b>Source</b>
<b>Location</b>	Organization	Organization tab	<b>Location</b>
<b>Marking System</b>	Organization	Organization tab	<b>Marking system</b>
<b>GPAScale</b>	Organization	Organization tab	<b>GPA scale</b>

**Warning:** By default, some Education Relationship (Organization) fields inherit character limits from The Education Edge. These limits are 100 characters for the **School Name** field, 51 characters for the **Accreditation** field, and 50 characters for the **Marking System** fields. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Financial Aid Fields

The Financial Aid field set includes fields that map to the Financial Aid tab of an applicant record in The Education Edge.

On an Online Admissions form, this field set is only available for the Applicant category. You can add the Attribute field set to the Financial Aid category.

This field set is not available on Online Reenrollment forms.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Academic Year</b>	Applicant	Financial Aid tab	<b>Academic year</b>
<b>Financial Aid Desired</b>	Applicant	Financial Aid tab	<b>Financial aid desired</b>
<b>Family Income</b>	Applicant	Financial Aid tab	<b>Family income</b>
<b>Adjusted Family Income</b>	Applicant	Financial Aid tab	<b>Adjusted family income</b>

**Warning:** By default, the **Family Income** and **Adjusted Family Income** fields inherit a 20-character limit from The Education Edge. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Individual Relationship Fields

The Individual Relationship field set includes fields that map to the Bio 1 tab of an individual record. When you add the Individual Relationship field set to a form, the Individual Relationship category includes the Individual Relationship (Relationship) field set.

On an Online Admissions form, you can add the Address, Attribute, Individual Relationship, Notepad, and Organization Relationship field sets to the Individual Relationship category. And you can add the Individual Relationship field set to the Applicant, Education Relationship (Organization), Individual Relationship, and Organization Relationship categories.

On an Online Reenrollment form, you can add the Address and Organization Relationship field sets to the Individual Relationship category. And you can add the Individual Relationship field set to the Student category.

**Warning:** When you create an individual record in The Education Edge, the program requires an entry in the **Last name** field. Therefore, you must include the **Last name** field on your Online Admissions and Online Reenrollment forms. Without data from required fields, you cannot successfully process applications in the Online Admissions and Online Reenrollment Plug-in.

**Note:** To allow students to select multiple ethnicities, the **Ethnicity** field changed from a dropdown list to a checkbox list in *Online Admissions* 6.25. If you update from a previous version, the **Ethnicity** field remains a dropdown list on any existing forms where it was in use. To update the field, remove it from the form and add it again.

**Warning:** When you import code table entries from The Education Edge for the **Ethnicity** field, the entries cannot include nonalphanumeric characters such as "<," ">," and "&." If a code table entry includes such characters, no label appears on the form with the checkbox for that entry.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Last name	Individual	Bio 1 tab	Last name
First Name	Individual	Bio 1 tab	First Name
Middle Name	Individual	Bio 1 tab	Middle Name
Title	Individual	Bio 1 tab	Title 1
Title2	Individual	Bio 1 tab	Title 2

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Suffix</b>	Individual	Bio 1 tab	<b>Suffix 1</b>
<b>Suffix2</b>	Individual	Bio 1 tab	<b>Suffix 2</b>
<b>Gender</b>	Individual	Bio 1 tab	<b>Gender</b>
<b>Social Security Number</b>	Individual	Bio 1 tab	<b>SSN</b>
<b>Nickname</b>	Individual	Bio 1 tab	<b>Nickname</b>
<b>Birth Date</b>	Individual	Bio 1 tab	<b>Birth date</b>
<b>Deceased</b>	Individual	Bio 1 tab	<b>Deceased?</b>
<b>Birth Country</b>	Individual	Bio 1 tab	<b>Birth country</b>
<b>Birth State</b>	Individual	Bio 1 tab	<b>Birth state</b>
<b>Birth City</b>	Individual	Bio 1 tab	<b>Birth city</b>
<b>Birth City NZ</b>	Individual	Bio 1 tab	<b>Birth city</b>
<b>Birth County</b>	Individual	Bio 1 tab	<b>Birth county</b> (appears only when certain countries are selected in the <b>Birth country</b> field)
<b>Birth Suburb</b>	Individual	Bio 1 tab	<b>Birth suburb</b> (appears only when "New Zealand" is selected in the <b>Birth country</b> field)
<b>Requests No Email</b>	Individual	Bio 1 tab	<b>Requests no email</b>
<b>Is Latino Hispanic</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Is Latino/Hispanic?</b>
<b>Ethnicity</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Ethnicity</b>
<b>Religion</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Religion</b>
<b>Church Affiliation</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Church affiliation</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Citizenship</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Citizenship</b>
<b>First Language</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>First language</b>
<b>Language Spoken At Home</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Language spoken at home</b>
<b>Years In US</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Years in US</b>
<b>Height</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Height</b>
<b>Weight</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Weight</b>
<b>Marital Status</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Marital status</b>
<b>Maiden Name</b>	Individual	Bio 1 tab (click <b>Demographics</b> )	<b>Maiden name</b>

**Warning:** By default, some Individual Relationship fields inherit character limits from The Education Edge. These limits are 12 characters for the **Birth Date**, **Height**, **Social Security Number**, and **Weight** fields; 50 characters for the **First Name**, **Middle Name**, **Maiden Name**, **Nickname**, and **Birth City** fields; 100 characters for the **Last name** field; and three characters for the **Years In US** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Birth Date** field uses the U.S. date validator, and the **Height** and **Weight** fields use the Numeric with decimals validator. Also, the **Social Security Number** field uses the Social Security number validator, and the **Years In US** field uses the Numeric validator. For information about validators, see [Validators on page 43](#).

## Individual Relationship (Relationship) Fields

The Individual Relationship (Relationship) field set is a subset of the Individual Relationship field set. It includes fields that map to the Relationships tab of an applicant, student, or individual record in The Education Edge. When you add the Individual Relationship field set to a form, the Individual Relationship (Relationship) field set appears as a subset of the Individual Relationship (Individual) category.

**Warning:** The **Spouse** field only maps to the corresponding field in Blackbaud Student Information System. You should not include the field on applications that map to The Education Edge. For

applicants to select a spouse in this field on an Online Admissions or Online Reenrollment form, a record for the spouse must already exist in the database.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Relationship</b>	Applicant, Student, or Individual	Relationships tab	<b>Relationship</b>
<b>Reciprocal Relationship</b>	Applicant, Student, or Individual	Relationships tab	<b>Reciprocal Relationship</b>
<b>Emergency Contact</b>	Applicant, Student, or Individual	Relationships tab	<b>Emergency Contact</b>
<b>Lives With Applicant</b>	Applicant, Student, or Individual	Relationships tab	<b>Lives with Applicant</b>
<b>Spouse</b>	Applicant, Student, or Individual	Relationships tab	<b>Spouse</b>
<b>Notes</b>	Applicant, Student, or Individual	Relationships tab	<b>Notes</b> (at the bottom of the tab)

**Warning:** By default, the **Reciprocal Relationship** field inherits a 50-character limit from The Education Edge. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Reciprocal Relationship** field uses the Numeric validator. For information about validators, see [Validators on page 43](#).

## Medical Fields

The Medical field set is a subset of the Applicant and Student field sets. When you create a form, the Applicant or Student category includes the Medical field set. This field set includes fields that map to the Medical tab of an applicant or student record in The Education Edge. The Medical category includes the Physician's Address, Primary Insurance, and Secondary Insurance field sets. You can add the Medical Condition and Medical History field sets to the Medical category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Wants School Insurance</b>	Applicant or student	Medical tab (select <b>General</b> )	<b>Wants school insurance</b>



Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Permission To Treat	Applicant or student	Medical tab (select <b>General</b> )	Permission to treat
Physician Name	Applicant or student	Medical tab (select <b>General</b> )	Physician name
Preferred Hospital	Applicant or student	Medical tab (select <b>General</b> )	Preferred hospital
Notes	Applicant or student	Medical tab (select <b>Notes</b> )	Notes

**Warning:** By default, some Medical fields inherit character limits from The Education Edge. These limits are 60 characters for the **Physician Name** field and 1,000 characters for the **Notes** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Medical Condition Fields

The Medical Condition field set includes fields that map to the Medical tab of an applicant or student record in The Education Edge. You can add the fields set to the Medical category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Allergy Or Condition	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Allergy/Condition
Effective Date	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Effective Date
End Date	Applicant or student	Medical tab (select <b>Conditions/History</b> )	End Date
Comments	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Comments

**Warning:** By default, the Medical Condition fields inherit character limits from The Education Edge. These limits are 60 characters for the **Allergy Or Condition** field, 12 characters for the **Effective Date** and **End Date** fields, and 255 characters for the **Comments** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Effective Date** and **End Date** fields use the U.S. date validator. For information about validators, see [Validators on page 43](#).

## Medical History Fields

The Medical History field set includes fields that map to the Medical tab of an applicant or student record in The Education Edge. You can add the field set to the Medical category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Date	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Date
Category	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Category
Description	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Description
Comments	Applicant or student	Medical tab (select <b>Conditions/History</b> )	Comments

**Warning:** By default, some Medical History fields inherit character limits from The Education Edge. These limits are 12 characters for the **Date** field and 255 characters for the **Comments** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Notepad Fields

The Notepad field set includes fields that map to the Notes to tab of an applicant, individual, or organization record in The Education Edge.

On an Online Admissions form, you can add this field set to the Applicant, Education Relationship, Education Relationship (Organization), Individual Relationship, and Organization Relationship categories.

This field set is not available on Online Reenrollment forms.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Type</b>	Applicant, Individual, or Organization	Notes tab (on Notes screen)	<b>Type</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Description</b>	Applicant, Individual, or Organization	Notes tab (on Notes screen)	<b>Description</b>
<b>Title</b>	Applicant, Individual, or Organization	Notes tab (on Notes screen)	<b>Title</b>
<b>Author</b>	Applicant, Individual, or Organization	Notes tab (on Notes screen)	<b>Author</b>
<b>Note</b>	Applicant, Individual, or Organization	Notes tab (on Notes screen)	<b>Notes</b>

**Warning:** By default, some Notepad fields inherit character limits from The Education Edge. These limits are 255 characters for the **Description** field and 50 characters for the **Title** and **Author** fields. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Organization Relationship Fields

The Organization Relationship field set includes fields that map to the Organization tab of an organization record. When you add the Organization Relationship field set to a form, the Organization Relationship category includes the Organization Relationship (Relationship) field set.

On an Online Admissions form, you can add the Address, Attribute, Individual Relationship, Notepad, and Organization Relationship field sets to the Organization Relationship category. And you can add the Organization Relationship field set to the Applicant, Education Relationship (Organization), Individual Relationship, and Organization Relationship categories.

On an Online Reenrollment form, you can add the Address field set to the Organization Relationship category. And you can add the Organization Relationship field set to the Individual Relationship category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Name</b>	Organization	Organization tab	<b>Name</b>
<b>Classification</b>	Organization	Organization tab	<b>Classification</b>
<b>Type</b>	Organization	Organization tab	<b>Type</b>
<b>Accreditation</b>	Organization	Organization tab	<b>Accreditation</b>
<b>Source</b>	Organization	Organization tab	<b>Source</b>

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
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<b>Location</b>	Organization	Organization tab	<b>Location</b>
<b>Marking System</b>	Organization	Organization tab	<b>Marking system</b>
<b>GPAScale</b>	Organization	Organization tab	<b>GPA scale</b>

**Warning:** By default, some Organization Relationship (Organization) fields inherit character limits from The Education Edge. These limits are 100 characters for the **Name** field, 51 characters for the **Accreditation** field, and 50 characters for the **Marking System** fields. If you increase the character limits in the Form Designer, you may lose data that website users submit.

## Organization Relationship (Relationship) Fields

The Organization Relationship (Relationship) field set is a subset of the Organization Relationship field set. It includes fields that map to the Relationships tab of an organization record in The Education Edge. When you add the Organization Relationship field set to a form, the Organization Relationship (Relationship) field set appears as a subset of the Organization Relationship (Organization) category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
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<b>Relationship</b>	Organization	Relationships tab	<b>Relationship</b>
<b>Reciprocal Relationship</b>	Organization	Relationships tab	<b>Reciprocal Relationship</b>
<b>Primary Business</b>	Organization	Relationships tab	<b>Primary Business</b>
<b>Position</b>	Organization	Relationships tab	<b>Position</b>
<b>Department</b>	Organization	Relationships tab	<b>Department</b>
<b>Contact Type</b>	Organization	Relationships tab	<b>Contact Type</b>
<b>Primary Contact</b>	Organization	Relationships tab	<b>Primary Contact</b>
<b>Notes</b>	Organization	Relationships tab	<b>Notes</b>

**Warning:** By default, the **Position** field inherits a 50-character limit from The Education Edge. If you increase the character limit in the Form Designer, you may lose data that website users submit.

# Physician's Address

The Physician's Address field set is a subset of the Medical field set. When you create a form, the Applicant or Student category includes the Medical field set, which in turn includes the Physician's Address field set. It includes fields that map to the Medical tab of an applicant or student record in The Education Edge. You can add the Contact Info field set to the Physician's Address category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Country	Applicant or student	Medical tab (select <b>General</b> )	Country
Address	Applicant or student	Medical tab (select <b>General</b> )	Address
City	Applicant or student	Medical tab (select <b>General</b> )	City
State	Applicant or student	Medical tab (select <b>General</b> )	State
ZIP	Applicant or student	Medical tab (select <b>General</b> )	ZIP

**Warning:** By default, some Physician's Address fields inherit character limits from The Education Edge. These limits are 150 characters for the **Address** field, 50 characters for the **City** field, and 10 characters for the **ZIP** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **ZIP** field uses the Zip code validator. For information about validators, see [Validators on page 43](#).

# Primary Insurance Fields

The Primary Insurance field set is a subset of the Medical field set. When you create a form, the Applicant or Student category includes the Medical field set, which in turn includes the Primary Insurance field set. It includes fields that map to the Medical tab of an applicant or student record in The Education Edge. In addition, the Primary Insurance category includes the Primary Insurance Address field set.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Is Primary	Applicant or student	Medical tab (select <b>Insurance</b> )	Primary Insurance
Health Care Provider	Applicant or student	Medical tab (select <b>Insurance</b> )	Health care provider (under <b>Primary Insurance</b> )
Policy Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Policy number
Policy Contact Name	Applicant or student	Medical tab (select <b>Insurance</b> )	Policy contact name
Contact Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Contact number
Group Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Group #
Related As	Applicant or student	Medical tab (select <b>Insurance</b> )	Related as
Contact Birth Date	Applicant or student	Medical tab (select <b>Insurance</b> )	Contact birth date

**Warning:** By default, some Primary Insurance fields inherit character limits from The Education Edge. These limits are 255 characters for the **Health Care Provider** field, 60 characters for the **Policy Contact Name**, **Contact Number**, and **Group Number** fields, and 12 characters for the **Contact Birth Date** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Contact Name** field uses the U.S. phone validator, and the **Contact Birth Date** field uses the U.S. date validator. For information about validators, see [Validators on page 43](#).

## Primary Insurance Address Fields

The Primary Insurance Address field set is a subset of the Primary Insurance field set in the Medical category. When you create a form, the Applicant or Student category includes the Medical field set, which in turn includes the Primary Insurance field set and its Primary Insurance Address field set. It includes fields that map to the Medical tab of an applicant or student record in The Education Edge. You can add the Contact Info field set to the Primary Insurance Address category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Country	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	Country
Address	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	Address
City	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	City
State	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	State
ZIP	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	ZIP

**Warning:** By default, some Primary Insurance Address fields inherit character limits from The Education Edge. These limits are 150 characters for the **Address** field, 50 characters for the **City** field, and 10 characters for the **ZIP** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **ZIP** field uses the Zip code validator. For information about validators, see [Validators on page 43](#).

## Roommate Fields

The Roommate field set includes fields to identify an applicant's roommate. The entries in these fields are used to locate matching applicant or student records in The Education Edge and then specify the roommate on the applicant's record. The data in these fields does not update information on the roommate's applicant or student record. This field set is only available for the Applicant category.

This field set is not available on Online Reenrollment forms.

Default Field Label on Online Admissions Form	Searches for Match On	Maps To
<b>First Name</b>	Bio 1 tab of applicant or student records	<b>Roommates</b> field on the Bio 2 tab of the applicant record

**Default Field Label on Online Admissions Form****Searches for Match On****Maps To**

<b>Middle Name</b>	Bio 1 tab of applicant or student records	<b>Roommates</b> field on the Bio 2 tab of the applicant record
<b>Last name</b>	Bio 1 tab of applicant or student records	<b>Roommates</b> field on the Bio 2 tab of the applicant record
<b>Nickname</b>	Bio 1 tab of applicant or student records	N/A
<b>Social Security Number</b>	Bio 1 tab of applicant or student records	N/A

**Warning:** By default, the Roommate fields inherit character limits from The Education Edge. These limits are 50 characters for the **First Name**, **Middle Name**, and **Nickname** fields, 100 characters for the **Last name** field, and 12 characters for the **Social Security Number** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Social Security Number** field uses the Social Security number validator. For information about validators, see [Validators on page 43](#).

## Secondary Insurance Fields

The Secondary Insurance field set is a subset of the Medical field set. When you create a form, the Applicant or Student category includes the Medical field set, which in turn includes the Secondary Insurance field set. It includes fields that map to the Medical tab of an applicant or student record in The Education Edge. In addition, the Secondary Insurance category includes the Secondary Insurance Address field set.

**Default Field Label on Online Admissions Form****The Education Edge Record Type****The Education Edge Tab****The Education Edge Field**

Is Primary	Applicant or student	Medical tab (select <b>Insurance</b> )	Primary Insurance
Health Care Provider	Applicant or student	Medical tab (select <b>Insurance</b> )	Health care provider (under <b>Secondary Insurance</b> )
Policy Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Policy number



Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Policy Contact Name	Applicant or student	Medical tab (select <b>Insurance</b> )	Policy contact name
Contact Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Contact number
Group Number	Applicant or student	Medical tab (select <b>Insurance</b> )	Group #
Related As	Applicant or student	Medical tab (select <b>Insurance</b> )	Related as
Contact Birth Date	Applicant or student	Medical tab (select <b>Insurance</b> )	Contact birth date

**Warning:** By default, some Secondary Insurance fields inherit character limits from The Education Edge. These limits are 255 characters for the **Health Care Provider** field, 60 characters for the **Policy Contact Name**, **Contact Number**, and **Group Number** fields, and 12 characters for the **Contact Birth Date** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Contact Name** field uses the U.S. phone validator, and the **Contact Birth Date** field uses the U.S. date validator. For information about validators, see [Validators on page 43](#).

## Secondary Insurance Address Fields

The Secondary Insurance Address field set is a subset of the Secondary Insurance field set in the Medical category. When you create a form, the Applicant or Student category includes the Medical field set, which in turn includes the Secondary Insurance field set and its Secondary Insurance Address field set. It includes fields that map to the Medical tab of an applicant or student record in The Education Edge. You can add the Contact Info field set to the Secondary Insurance Address category.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Country	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	Country

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
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Address	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	Address
City	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	City
State	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	State
ZIP	Applicant or student	Medical tab (select <b>Insurance</b> and click <b>Health care provider</b> )	ZIP

**Warning:** By default, some Secondary Insurance Address fields inherit character limits from The Education Edge. These limits are 150 characters for the **Address** field, 50 characters for the **City** field, and 10 characters for the **ZIP** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **ZIP** field uses the Zip code validator. For information about validators, see [Validators on page 43](#).

## Student Fields

The Student field set includes fields that map to the Bio 1 and Bio 2 tabs of a student record in The Education Edge. When you create an Online Reenrollment form, the Student field set appears automatically and includes the Medical field set.

This field set is not available on Online Admissions forms.

On an Online Reenrollment form, you can add the Address, Attribute, and Individual Relationship field sets to the Student category.

**Warning:** When you create an applicant record in The Education Edge, the program requires an entry in the **Last name** field. Therefore, you must include the **Last name** field on Online Admissions forms. Without data from required fields, you cannot successfully process applications in the Online Admissions and Online Reenrollment Plug-in.

**Warning:** If you include the **Marital Status** or **Maiden Name** fields on an application but do not enable the corresponding fields in The Education Edge, the Online Admissions and Online Reenrollment Plug-in cannot process the data. To enable the fields in The Education Edge, select **Display Marital Status and Maiden Name fields for Students and Applicants** under **General** in **Configuration, Business Rules**.

**Warning:** When you import code table entries from The Education Edge for the **Ethnicity** field, the entries cannot include nonaphanumeric characters such as "<," ">," and "&." If a code table entry includes such characters, no label appears on the form with the checkbox for that entry.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
Last name	Student	Bio 1 tab	Last name
First Name	Student	Bio 1 tab	First Name
Middle Name	Student	Bio 1 tab	Middle Name
Title	Student	Bio 1 tab	Title 1
Title2	Student	Bio 1 tab	Title 2
Suffix	Student	Bio 1 tab	Suffix 1
Suffix2	Student	Bio 1 tab	Suffix 2
Nickname	Student	Bio 1 tab	Nickname
Gender	Student	Bio 1 tab	Gender
Requests No Email	Student	Bio 1 tab	Requests no email
Is Latino Hispanic	Student	Bio 1 tab (click Demographics)	Is Latino/Hispanic?
Ethnicity	Student	Bio 1 tab (click Demographics)	Ethnicity
Religion	Student	Bio 1 tab (click Demographics)	Religion
Church Affiliation	Student	Bio 1 tab (click Demographics)	Church affiliation
Citizenship	Student	Bio 1 tab (click Demographics)	Citizenship
First Language	Student	Bio 1 tab (click Demographics)	First language
Language Spoken At Home	Student	Bio 1 tab (click Demographics)	Language spoken at home
Years In US	Student	Bio 1 tab (click Demographics)	Years in US
Height	Student	Bio 1 tab (click Demographics)	Height

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Weight</b>	Student	Bio 1 tab (click <b>Demographics</b> )	<b>Weight</b>
<b>Marital Status</b>	Student	Bio 1 tab (click <b>Demographics</b> )	<b>Marital status</b>
<b>Maiden Name</b>	Student	Bio 1 tab (click <b>Demographics</b> )	<b>Maiden name</b>
<b>Visa Status</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa status</b>
<b>Visa Number</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa number</b>
<b>Visa Type</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa type</b>
<b>Visa Issued</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa issued</b>
<b>Visa Expires</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Visa expires</b>
<b>Passport Number</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Passport number</b>
<b>Passport Expires</b>	Student	Bio 1 tab (click <b>Visa/Passport</b> )	<b>Passport expires</b>
<b>In-State Resident</b>	Student	Bio 2 tab	<b>In-state resident</b>
<b>Resident Years</b>	Student	Bio 2 tab	<b>for ____ year(s)</b> (enabled only when <b>In-state resident</b> is selected)
<b>Resident Months</b>	Student	Bio 2 tab	<b>____ month(s)</b> (enabled only when <b>In-state resident</b> is selected)
<b>Resident County</b>	Student	Bio 2 tab	<b>in ____ county</b> (enabled only when <b>In-state resident</b> is selected)

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Bus Route</b>	Student	Bio 2 tab	<b>Bus route</b>
<b>District</b>	Student	Bio 2 tab	<b>District</b>
<b>Birth Date</b>	Student	Bio 2 tab	<b>Birth date</b>
<b>Birth City</b>	Student	Bio 2 tab	<b>City</b>
<b>Birth City NZ</b>	Student	Bio 2 tab	<b>City</b>
<b>Birth State</b>	Student	Bio 2 tab	<b>State</b>
<b>Birth Suburb</b>	Student	Bio 2 tab	<b>Suburb</b> (appears only when "New Zealand" is selected in the <b>Country</b> field)
<b>Birth Country</b>	Student	Bio 2 tab	<b>Country</b> (appears only when certain countries are selected in the <b>Country</b> field)
<b>Birth County</b>	Student	Bio 2 tab	<b>County</b>

**Warning:** By default, some Student fields inherit character limits from The Education Edge. These limits are 50 characters for the **First Name**, **Maiden Name**, **Middle Name**, and **Nickname** fields; 12 characters for the **Height**, **Passport Expires**, **Visa Expires**, **Visa Issued**, and **Weight** fields; 60 characters for the **Passport Number**, **Visa Number**, and **Birth City** fields; three characters for the **Years In US** and **Resident Years** fields; 100 characters for the **Last name** field; 11 characters for the **Birth Date** field; and two characters for the **Resident Months** field. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Passport Expires**, **Visa Expires**, **Visa Issued**, and **Birth Date** fields use the U.S. date validator. Also, the **Resident Months** and **Resident Years** fields use the Numeric validator, and the **Weight** and **Years In US** fields use the Numeric with decimals validator. For information about validators, see [Validators on page 43](#).

## Test Score Fields

The Test Score field set includes fields that map to the Test tab of an applicant record in The Education Edge. This field set is only available for the Applicant category.

This field set is not available on Online Reenrollment forms.

Default Field Label on Online Admissions Form	The Education Edge Record Type	The Education Edge Tab	The Education Edge Field
<b>Test Type</b>	Applicant	Tests tab	<b>Test Type</b>
<b>Subtest</b>	Applicant	Tests tab	<b>Subtest</b>
<b>Date</b>	Applicant	Tests tab	<b>Date</b>
<b>Score</b>	Applicant	Tests tab	<b>Score</b>
<b>Stanine</b>	Applicant	Tests tab	<b>Stanine</b>
<b>Percentile1</b>	Applicant	Tests tab	<b>Percentile 1</b>
<b>Percentile2</b>	Applicant	Tests tab	<b>Percentile 2</b>

**Warning:** By default, some Test Score fields inherit character limits from The Education Edge. These limits are 12 characters for the **Date** field, 15 characters for the **Score** field, one character for the **Stanine** field, and three characters for the **Percentile1** and **Percentile2** fields. If you increase the character limits in the Form Designer, you may lose data that website users submit.

**Note:** By default, the **Date** field uses the U.S. date validator, and the **Score**, **Stanine**, **Percentile1**, and **Percentile2** fields use the Numerical with decimal validator. For information about validators, see [Validators on page 43](#).