

WORKFLOW DEFINITION

Standard Re-enrolment Workflow

Who does what, in what order, from launch readiness to Transitioning Years in OpenApply.



PRODUCT

OpenApply

OWNER

Admissions team

VERSION

October 2026

SOURCE

OpenApply Help Centre

How re-enrolment works

Re-enrolment asks every returning family to confirm, decline or hold their place for next year. You prepare the data and settings, invite families from the Re-Enrolment dashboard, chase anyone who hasn't answered, then close the cycle by running Transitioning Years.

Who's involved



Admissions team

Owns the cycle: prepares records, configures settings, sends invitations, chases responses and runs the year transition.



Parents and guardians

Open the secure link, choose Yes, No or Undecided for each child, complete forms and pay if required.



OpenApply

Sends notification emails, records each decision as a re-enrolment status and updates the dashboard and analytics.

Four phases

Phase 1 · Prepare

Clean records, configure settings, emails and forms, exclude non-returners, test.

Phase 2 · Invite & respond

Send initial invitations. Families answer per child before the deadline.

Phase 3 · Track & chase

Monitor statuses, resend reminders, record offline decisions.

Phase 4 · Close & transition

Confirm every decision, check grades, export, run Transitioning Years.

ELIGIBILITY RULE

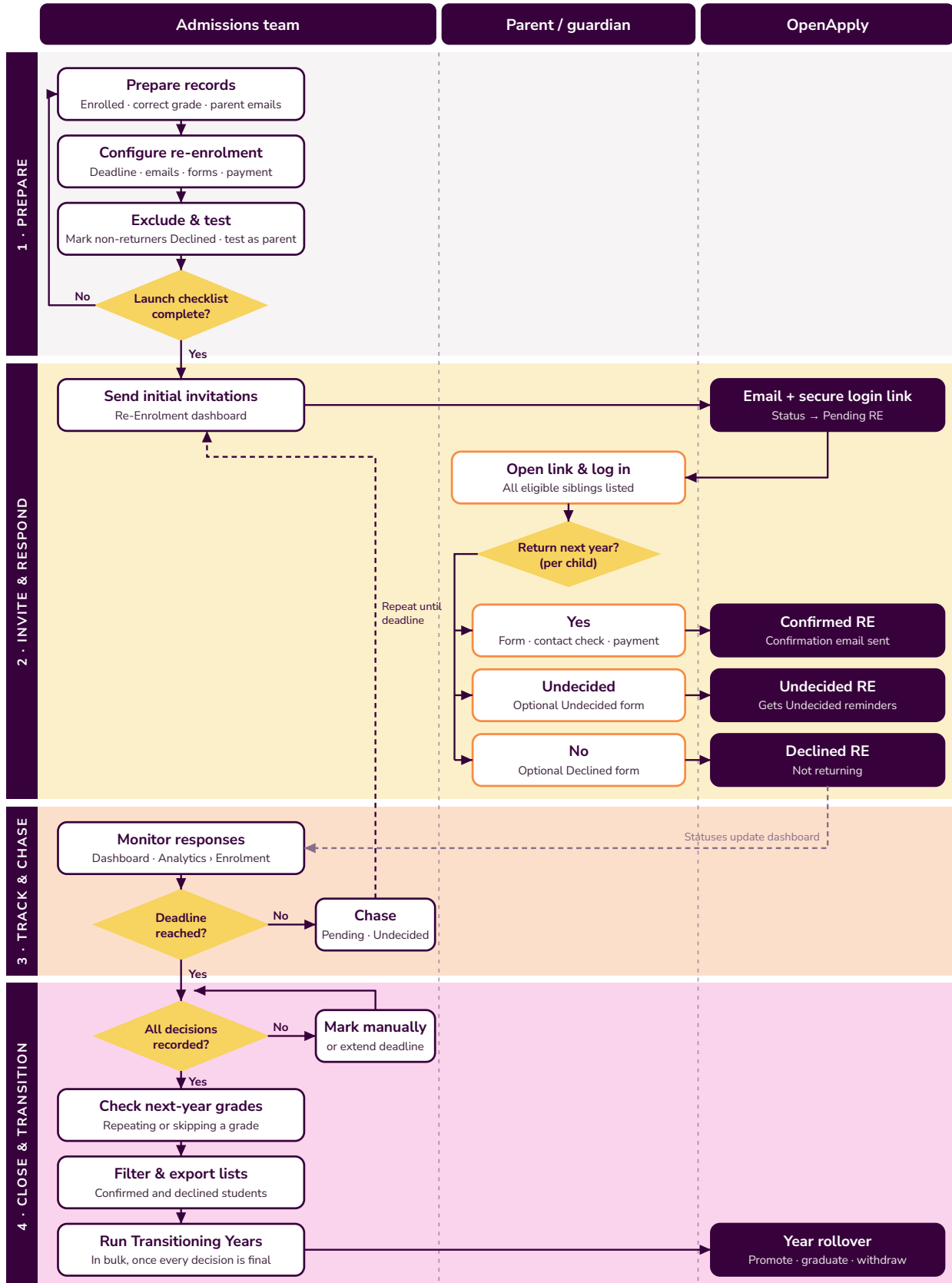
A student only appears on the Re-Enrolment dashboard when their status is **Enrolled**, they're **not in the top grade**, they're **not already enrolled as a new student for next year**, and they're assigned to the **correct current grade**.

IMPORTANT

Re-enrolment doesn't move anyone up a grade. Transitioning Years does that: it promotes returning students, graduates the top grade and withdraws leavers. Run it only once every decision is final, or you'll get unexpected results.

Workflow diagram

 Admissions action
 Parent action
 OpenApply (automatic)
 ◆ Decision point
 ---- Loop / data flow



Workflow definition

Each step has one owner and a clear finish line. Step IDs match the diagram's phases, so you can reference them in project plans and handovers.

#	Step	Owner	Where in OpenApply	Done when
PHASE 1 · PREPARE				
1.1	Prepare student records	Admissions	Student profiles	Returning students are Enrolled, in the correct current grade; graduating students sit in the top grade; families are linked.
1.2	Verify parent contacts	Admissions	Student profiles	Every student has at least one valid parent email; duplicates are cleaned up; a test email reaches an internal account.
1.3	Enable re-enrolment and set the deadline	Admissions	Settings › Admissions › Re-Enrolment	Re-enrolment is on, the deadline and academic year are confirmed, and the Undecided option is set as intended.
1.4	Customise notification emails	Admissions	Settings › Admissions › Status & Notification	Initial, Pending, Undecided and Confirmation emails are reviewed, include <code>re_enrollment_url</code> , and explain the deadline and next steps.
1.5	Configure forms, contract and payment	Admissions	Settings › Forms	Re-Enrolment Form is enabled, optional Undecided and Declined forms are set, the contract is customised and payment methods are confirmed.
1.6	Exclude students not invited back	Admissions	Re-Enrolment dashboard	Those students are marked Decline and saved with Confirm Re-Enrolment before any email goes out.
1.7	Run an internal test	Admissions	Parent portal (test family)	A test re-enrolment and payment complete; dashboard statuses and Enrolment Analytics update correctly.
1.8	Launch decision	Admissions lead	—	GATE Every checklist item is done, the team is briefed and the communication plan is ready.

#	Step	Owner	Where in OpenApply	Done when
PHASE 2 · INVITE & RESPOND				
2.1	Send initial invitations	Admissions	Re-Enrolment › Send Re-Enrolment Notifications › Send Initial Re-Enrolment Reminders	You've confirmed the email count and invitations have gone to every family with status Not Sent.
2.2	Deliver invitation	OpenApply	Automatic	Each family receives a unique, password-free login link. Students show as Pending RE.
2.3	Open link and log in	Parent	Email link or parent dashboard	The parent sees every eligible child, including siblings.
2.4	Choose an option for each child	Parent	Re-enrolment page	Yes , No or Undecided is selected for every child.
2.5	Complete forms and pay	Parent	Re-Enrolment Form, payment step	Required fields, contact details and any payment are submitted before the deadline.
2.6	Record the decision	OpenApply	Automatic	Status changes to Confirmed, Undecided or Declined RE. Confirmed families get the Confirmation email.
PHASE 3 · TRACK & CHASE				
3.1	Monitor responses	Admissions	Re-Enrolment dashboard; Analytics › Enrolment	You know how many students are Confirmed, Pending, Undecided and Declined, by grade.
3.2	Chase families who haven't decided	Admissions	Dashboard › Resend Pending / Resend Undecided Reminders; envelope icon on the Applicant Profile for one family	Reminders have gone to every Pending and Undecided family.
3.3	Record decisions made outside the form	Admissions	Applicant Profile (pencil icon) or dashboard in bulk, then Confirm Re-Enrolment	Phone, email and in-person decisions are reflected in OpenApply.
3.4	Extend the deadline if needed	Admissions	Settings › Admissions › Re-Enrolment	The new deadline is saved and reminders are resent.

#	Step	Owner	Where in OpenApply	Done when
PHASE 4 · CLOSE & TRANSITION				
4.1	Confirm all decisions are recorded	Admissions	Re-Enrolment dashboard	GATE No student is left Pending or Undecided.
4.2	Check next-year grades	Admissions	Re-Enrolment dashboard	Students default to the next grade. Anyone repeating or skipping a grade has been edited.
4.3	Filter and export lists	Admissions	Re-Enrolment dashboard filters	Confirmed and declined lists are exported for reporting and handover.
4.4	Run Transitioning Years	Admissions	Transitioning Years (bulk)	Run once, after every decision is final.
4.5	Year rollover	OpenApply	Automatic	Returning students are promoted, the top grade graduates and leavers are withdrawn.

Re-enrolment statuses

Status	Meaning	Next action
Not Sent	Eligible, but no invitation has gone out yet.	Send initial invitations (2.1).
Pending RE	Invited, no response yet.	Resend Pending Reminders (3.2).
Undecided RE	The family responded but hasn't made a final choice.	Resend Undecided Reminders, follow up personally (3.2).
Confirmed RE	The student is returning.	None. Include in the confirmed export (4.3).
Declined RE	The student isn't returning.	Include in the declined export; withdrawn at Transitioning Years.

Notifications and exceptions

Notification emails

Set these up under Settings › Admissions › Status & Notification. Each one supports mail-merge values. Always include `re_enrollment_url` so families log in without a password.

Email	Goes to	Sent from
Initial Reminder	Families with status Not Sent	Send Initial Re-Enrolment Reminders (2.1)
Pending Reminder	Families who haven't responded	Resend Pending Reminders (3.2)
Undecided Reminder	Families who chose Undecided	Resend Undecided Reminders (3.2)
Re-Enrolment Confirmation	Families who confirmed	Automatic on confirmation (2.6)

Exception handling

Situation	What to do
A family missed the deadline	Extend the deadline in Settings › Admissions › Re-Enrolment, then resend reminders. Or record their decision manually (3.3).
A family didn't get the email	Check the parent email on the student profile, resend from the dashboard or the Applicant Profile envelope icon, and ask them to check spam.
A student is missing from the dashboard	Check the eligibility rule: Enrolled, not top grade, not already a new enrolment for next year, correct current grade.
Next-year grade is wrong	Edit the re-enrolment grade on the dashboard before you run Transitioning Years.
Counts look wrong	Make sure changes are saved, clear dashboard filters, and check Analytics for the right academic year.

PAYMENT DECISION

If families must pay to confirm, enable **only electronic payment methods**. If you allow offline payment, families can submit without paying and OpenApply won't record a payment, so you'll need to reconcile it separately.

Sources: OpenApply Help Centre, Re-Enrolment section: QuickStart Guide; Launch Readiness Checklist; Configuring your Re-Enrolment Preferences; Sending Re-Enrolment Email Notifications; Tracking your Re-Enrolment Status; Marking Re-Enrolment Manually; Parent Guide to completing Re-enrolment; Filtering and Exporting Re-enrolled Students.