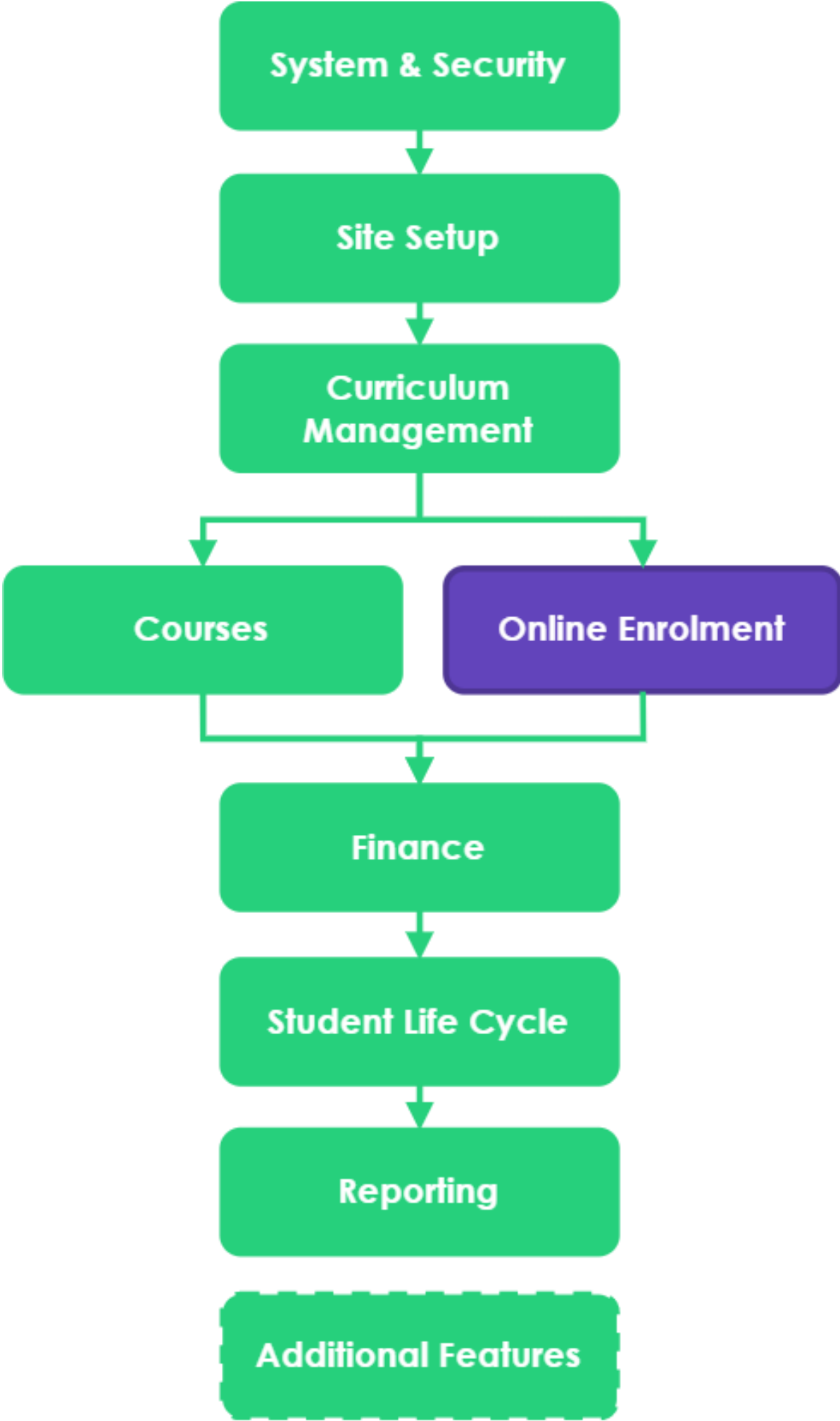


# Topic 5.2 - Online Applications and Enrolments



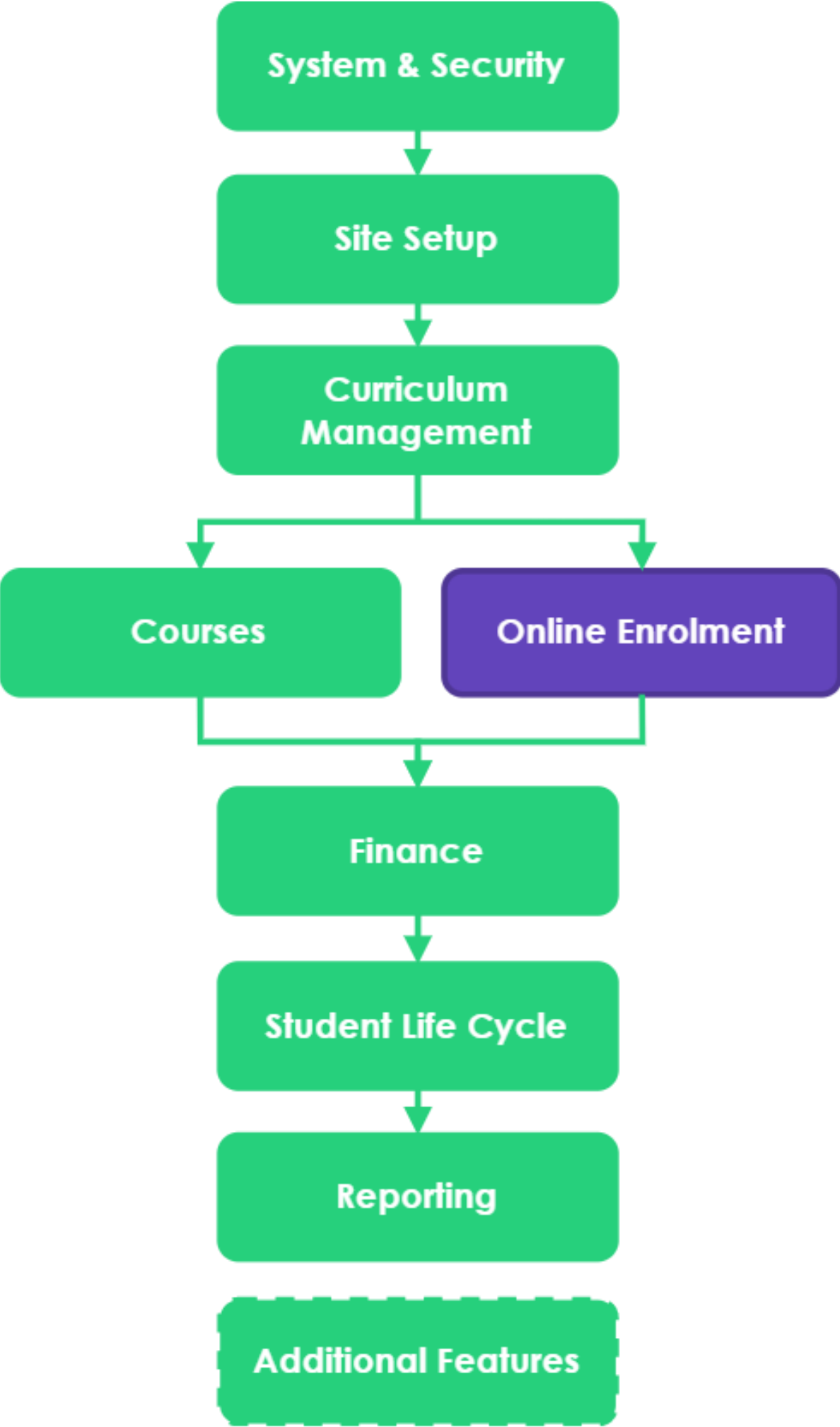
# Agenda



## Topics Covered

- 1 Online Course Forms
- 2 Kanban
- 3 Automated Communication
- 4 Feedback Forms
- 5 Staff Notifications
- 6 Payments
- 7 Duplicate Records
- 8 Online Application Demonstration

# Agenda



## Learning Objectives

- 1 Create/edit a course form
- 2 Link a course form to a course
- 3 Set up the Kanban status'
- 4 Set up course application status'
- 5 Create and link email templates for the course application status'
- 6 Set up a Feedback Form
- 7 Allow staff notifications
- 8 Understand where payments can be taken (covered in Finance session)
- 9 Merge duplicate records
- 10 Process an application within the course application view

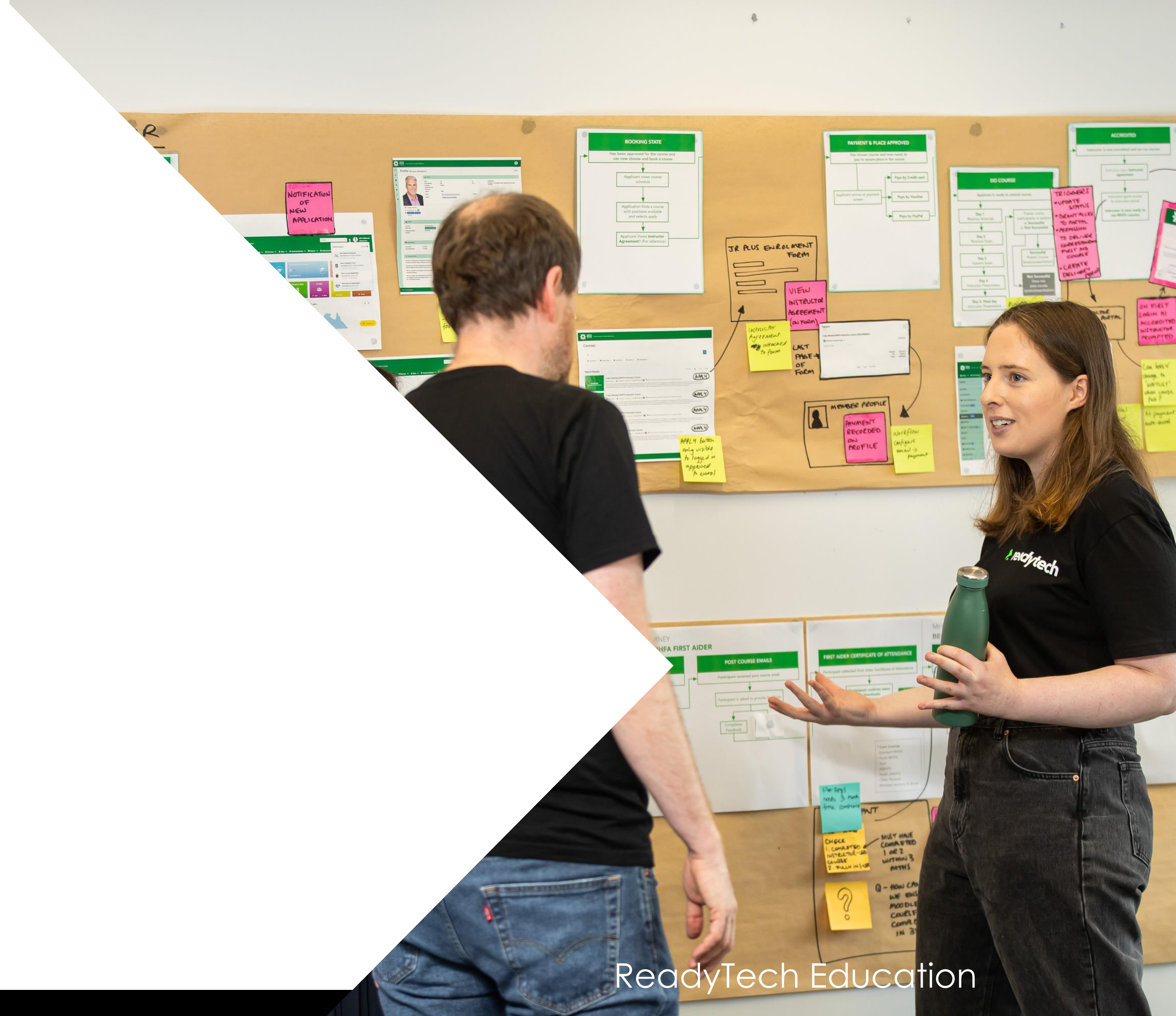




# Recap



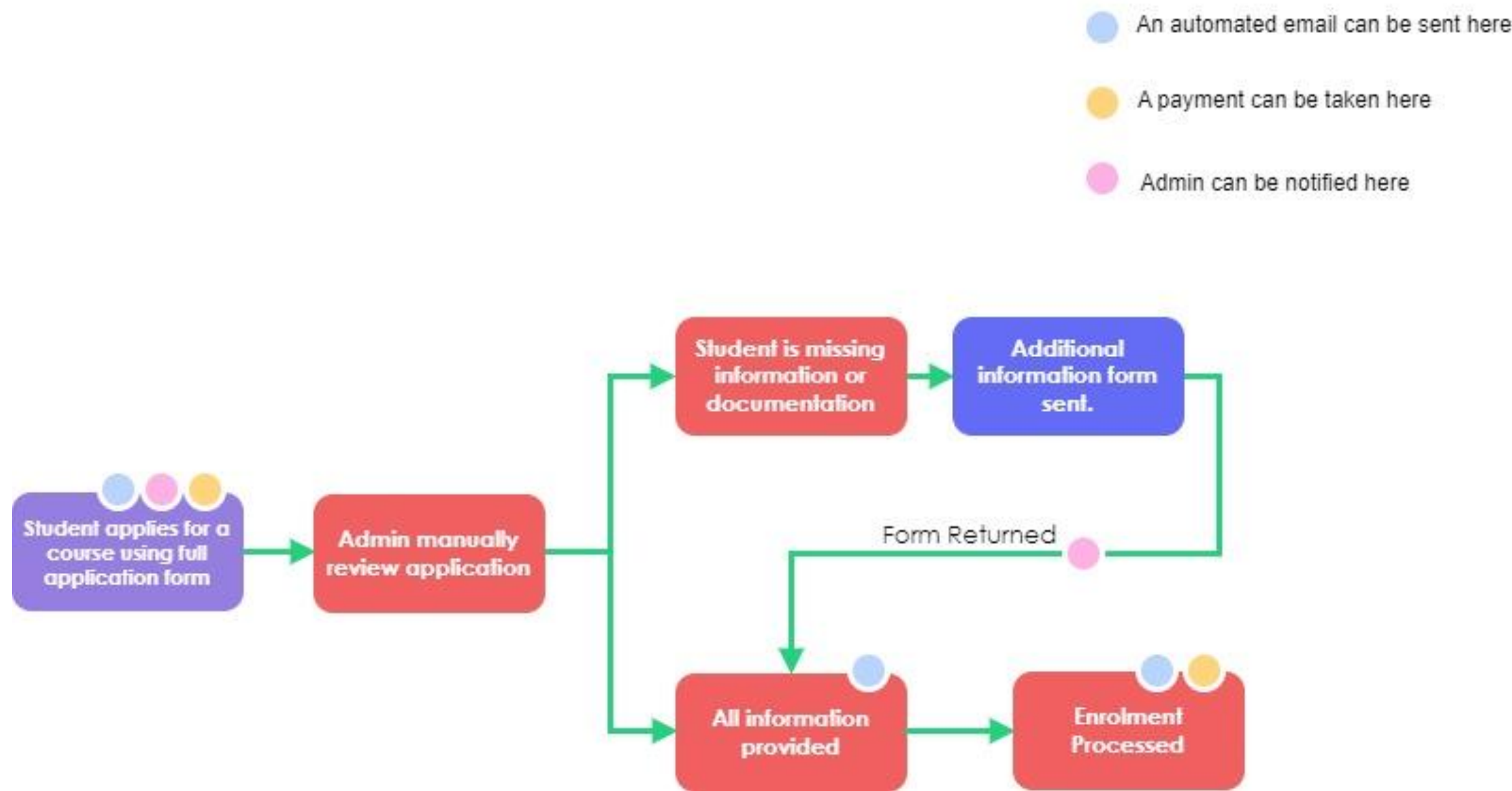
ReadyTech Education





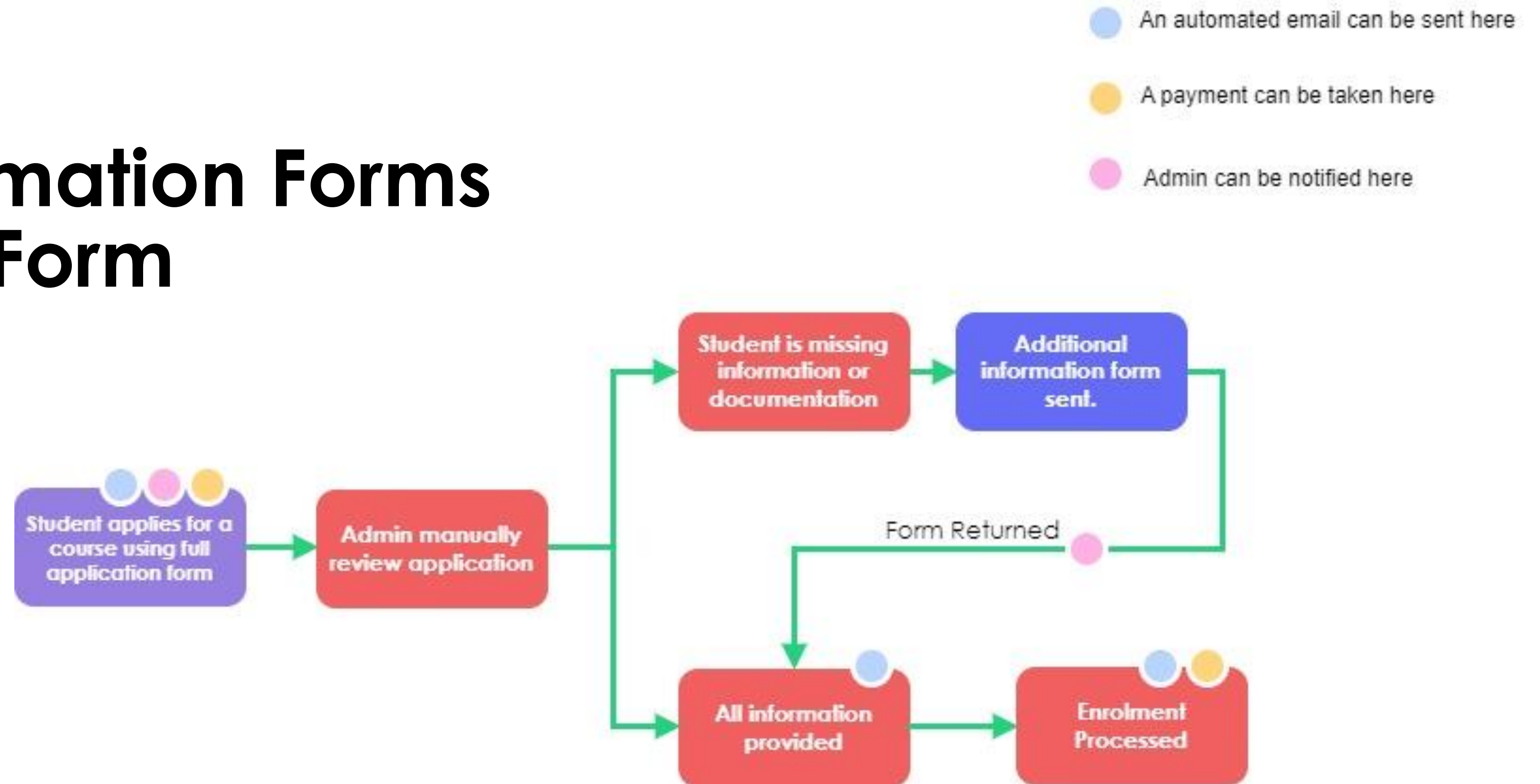
# Suggested Setup

## Standard VET Course



Kanban Status	Course Application Status	Default Email Template
New Applications	Applied	Application Received
	Duplicate	
	Partial	The system sends this automatically
Under Review	Interview	
	In Progress	
Application Incomplete	Compliance Info	Compliance Information Missing
	ID Documents	Identification Documents Missing
Complete	Ineligible	Eligibility Criteria Not Met
	Unsuccessful	Application Unsuccessful
	Withdrawn	Application Withdrawn
	Enrolled	Confirmation of Enrolment

# Additional Information Forms / Full AVETMISS Form




# Feedback Form

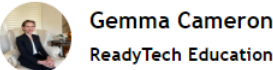
## Creation

Allow you to do collect information based off an individual party records ID

Information collected is automatically loaded into the individual party record

Administration > Forms > Feedback Form > +

 readytech



Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

Party Form

Party Form > List

Online Forms

Statuses

Brands

Search by form:

Search

Name	Category	Form Branding	Assignee	Created by	Created on	Enabled
Additional document upload	Enrolment			BridgetteOnboardingAdmin	17 February 2023 12:57 PM	<div><input type="checkbox"/></div> <div></div> <div></div>

| AVETMISS Details | Enrolment |  |  | BridgetteOnboardingAdmin | 17 February 2023 1:00 PM | ☐ |

1 - 2 of 2

1 Page

Edit Form

Save

Cancel

Details

\*Name:

AVETMISS Details

\*Category:

Enrolment

Branding:

Assignee:

Start Typing...

URL:

https://onboarding.jobreadyplus.com/survey/69234

?party\_identifier={Party Identifier}

Settings

Enabled:

☒

Add to all Host Families:

☐

Allow Party Entity Data Import:

☒

Allow Saving:

☒

Save Expires After (h):

hour(s)

Link:

Make available for all employers:

Make available for all individuals:

Publish to Student Portal:

☐ Services

☐

☒ Form

☐ Submitted Form

# Feedback Form

## Creation

Administration > Forms > Feedback Form > +

The form builder is very similar to the one we used for creating course forms

Modify the AVETMISS and Additional Document Upload forms to suit your organisation

Form Details

✓ Party Form was successfully updated

Edit Copy

**Details**

Name: AVETMISS Details

Category: AVETMISS Details

Web form:

Branding:

Assignee:

URL: https://onboarding.readystudent.com.au/survey/69234?party\_identifier={Party Identifier}

Fields Styles Tools

**Basic**

- Short Answer
- Radio buttons
- Dropdown
- Date
- Digital Signature
- Star Rating
- Properties
- Paragraph
- Checkboxes
- Smart Question
- File
- Tags
- Slider

**Party Entity Data**

- Profile
- Contact
- Contact - Work
- Address - Home
- Address - Billing
- AVETMISS
- Service
- Identification
- Contact - Home
- Address
- Address - Postal
- Contacts
- Agent
- Logistics

**Compliance Data**

- TAS/VIC

**AVETMISS Application Form**

[Click to Add Form Header]

Course 1 2 3 4 5 Success

**AVETMISS Information**

Please complete all required fields below

Labour Force Status

Country of Birth

Town/City of Birth

Citizenship Status

Nationality

Indigenous Status - Are you of Aboriginal or Torres Strait Islander descent?



# Feedback Form

## Sending Feedback Forms

Each feedback form has a unique ID

Using [Party Identifier] at the end of the URL links to a unique party profile

Administration > Forms > Feedback Form > Select Form > Details > URL

This link can be included within an email template

 **Spencer Smith** 00020006



 **Profile**

Title	Dr
First Name(s)	Spencer 

### Form Details

✓ Party Form was successfully updated

Edit

Copy

Details

Name:

Category:

Web form:


Branding:


Assignee:


URL:

AVETMISS Details

Enrolment







[https://onboarding.readystudent.com.au/survey/69234?party\\_identifier={Party Identifier}](https://onboarding.readystudent.com.au/survey/69234?party_identifier={Party Identifier})

# Feedback Form

## Sending Feedback Forms

This link can be included within an email template

Communications > Template

Added details will be merged with the unique party profile

Content

Dear {party[other\_name]},

Upon reviewing your application, it has come to our attention that you did not supply all the requested information.

Please click the following link and fill in all the required fields :[https://onboarding.jobreadyplus.com/survey/69234?party\\_identifier={Party Identifier}](https://onboarding.jobreadyplus.com/survey/69234?party_identifier={Party Identifier})

As we continue to review your application, please access our online Student Portal, where you can view documents related to your application, as well as view your Course Application progress.

Click the below link to activate your account on the student portal:

{party[student\_portal\_activation\_link]}

If you have any questions relating to your application, or the use of the Student Portal, please contact one of our friendly staff on {system[primary\_phone]}.

Party

abn

address\_list

anzsic\_description

contact\_email

contact\_firstname

contact\_method

contact\_name

contact\_phone

Content

Dear {party[other\_name]},

Upon reviewing your application, it has come to our attention that you did not supply all the requested information.

Please click the following link and fill in all the required fields : [https://onboarding.jobreadyplus.com/survey/69234?party\\_identifier={party\[party\\_identifier\]}](https://onboarding.jobreadyplus.com/survey/69234?party_identifier={party[party_identifier]})

As we continue to review your application, please access our online Student Portal, where you can view documents related to your application, as well as view your Course Application progress.

Click the below link to activate your account on the student portal:

{party[student\_portal\_activation\_link]}

If you have any questions relating to your application, or the use of the Student Portal, please contact one of our friendly staff on {system[primary\_phone]}.

Party

abn

address\_list

anzsic\_description

contact\_email

contact\_firstname

contact\_method

contact\_name

contact\_phone

# Feedback Form

## Received Data

A completed form

### AVETMISS Details

Please complete your details below

123

AVETMISS

Unique Student Identifier (USI)  
Don't have a USI? Apply here: <https://www.usi.gov.au/>  

ABC234567V

In which country were you born?  

Australia

Town/City of Birth  

Launceston

Main Language Spoken  

English

What is your Proficiency in spoken English?  

Very well

Person

Profile

Compliance

Assessments

AVETMISS

Checks

Career/Employment

Finance

Balance: \$0.00

Schedule

Notes / Checklists 0 +

Email

SMS

Documents 6

Letters & Forms

AVETMISSMargret Stewart (00020032)

Edit

Background

Labour Force Status:Part time employee/02  
Client Identifier:  
  
Country of Birth:Australia  
Town/City of Birth:Launceston  
Nationality:Not Stated  
Indigenous Status:No, Neither Aboriginal nor Torres Strait Islander  
Main Language:English

Citizenship Details

Citizenship Status:Australian Citizenship  
Citizenship Effective From Date:

Citizenship History

School Details

At School:No  
School Level:Year 12/12  
Year Completed:2012  
Learner Identifier (LUI):

Prior Education

Prior Education:No

Disability

Disability:No



# Feedback Form

## Review completed feedback forms

- Full overview of everyone who has a completed a feedback form  
Communications > Feedback > Forms
- Party profile level (individual student)  
Community > List All > select student > Feedback Form > Submitted Forms

You can review the form or assign the form to another party (e.g. staff member)

### Feedback Forms

Search

Enter Name or Party ID

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

Bulk Actions

1 - 6 of 61 Page

ID	Party Name	Party ID	Form Name	Category	Assignee	Created On	Updated On	Status	Last Updated By
FB000006	Stewart, Margret	00020032	Additional document upload	Enrolment		17/2/2023 02:48:14 PM	17/2/2023 02:48:17 PM	Complete	Kaminski, Bridgette
FB000005	Stewart, Margret	00020032	AVET/MASS Details	Enrolment		17/2/2023 02:46:40 PM	17/2/2023 02:46:40 PM	Complete	Kaminski, Bridgette
FB000004	Scott, Sonny	00020001	Additional document upload	Enrolment	Tom Thomas (00020022)	17/2/2023 02:36:46 PM	17/2/2023 02:36:46 PM	Complete	Scott, Sonny

Party Form

Search

Interview Timetable

Details

Notes / Checklists (0)

Documents (6)

Letters & Forms

Feedback Form

savecancel

Party Form

Applicant:Stewart, Margret

Archived:☐

Category:Enrolment

Assignee:

Start Typing...

Status:Complete

ID:FB000005

Conditions on Offer:☐

Interview

Date:

Create Event

Rating:

STATUS UPDATES

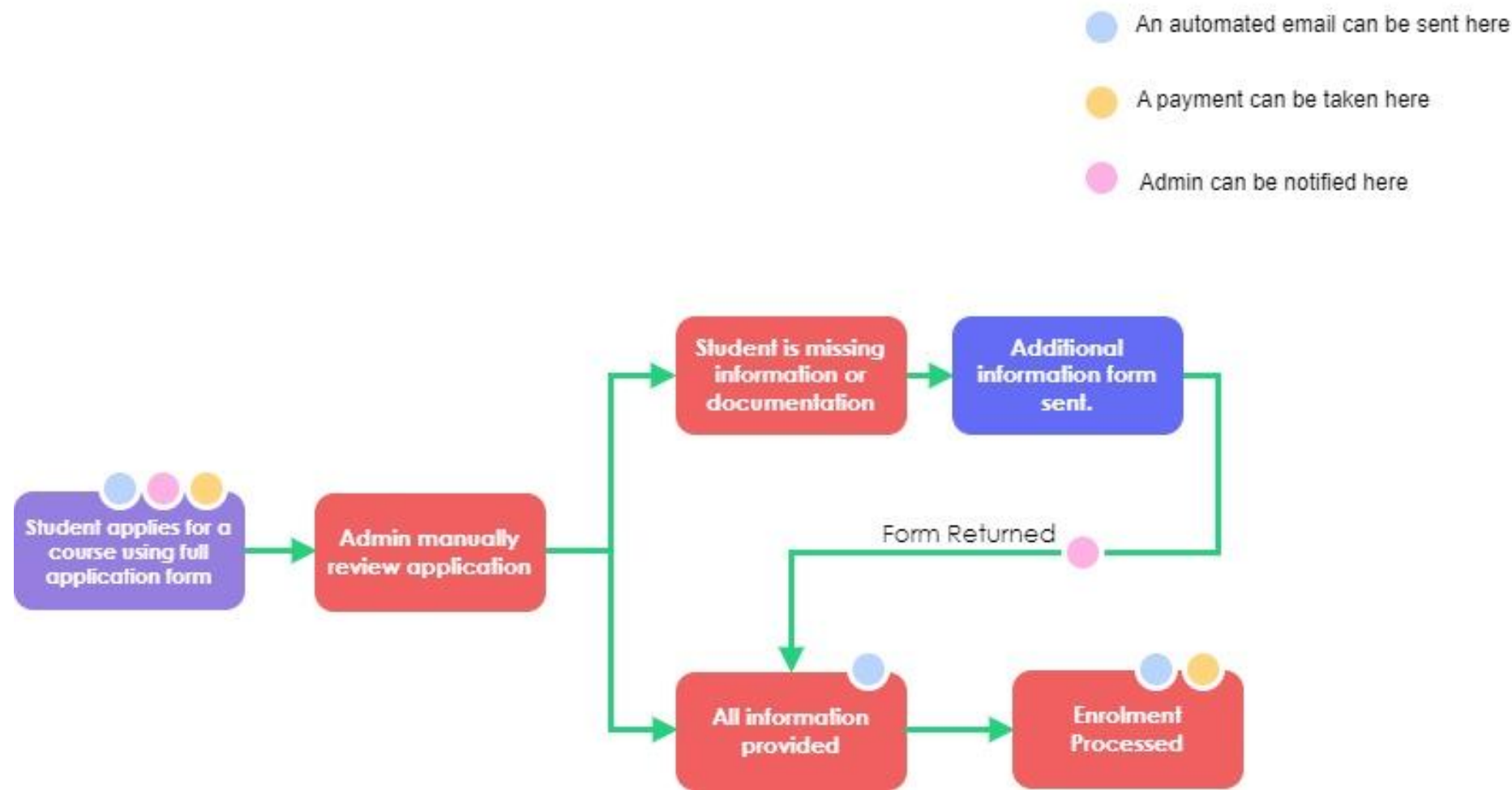
Date/Time	Status	Changed By	Reason
17 February 2023 2:46 PM	Complete	Kaminski, Bridgette	

FORM ANSWERS

Question	Reply
Date of Birth	27/7/1991
Gender	Female
E-mail Address	Bridgette.kaminski+MargretStewart@readytech.io
Mobile Number	0436996633
Unit/Flat Number	12

# Suggested Setup

## Standard VET Course



Kanban Status	Course Application Status	Default Email Template	Feedback Form
New Applications	Applied	Application Received	
	Duplicate		
	Partial	The system sends this automatically	
Under Review	Interview		
	In Progress		
Application Incomplete	Compliance Info	Compliance Information Missing	AVETMISS Details
	ID Documents	Identification Documents Missing	Additional Document Upload
Complete	Ineligible	Eligibility Criteria Not Met	
	Unsuccessful	Application Unsuccessful	
	Withdrawn	Application Withdrawn	
	Enrolled	Confirmation of Enrolment	

# Lets go do it!

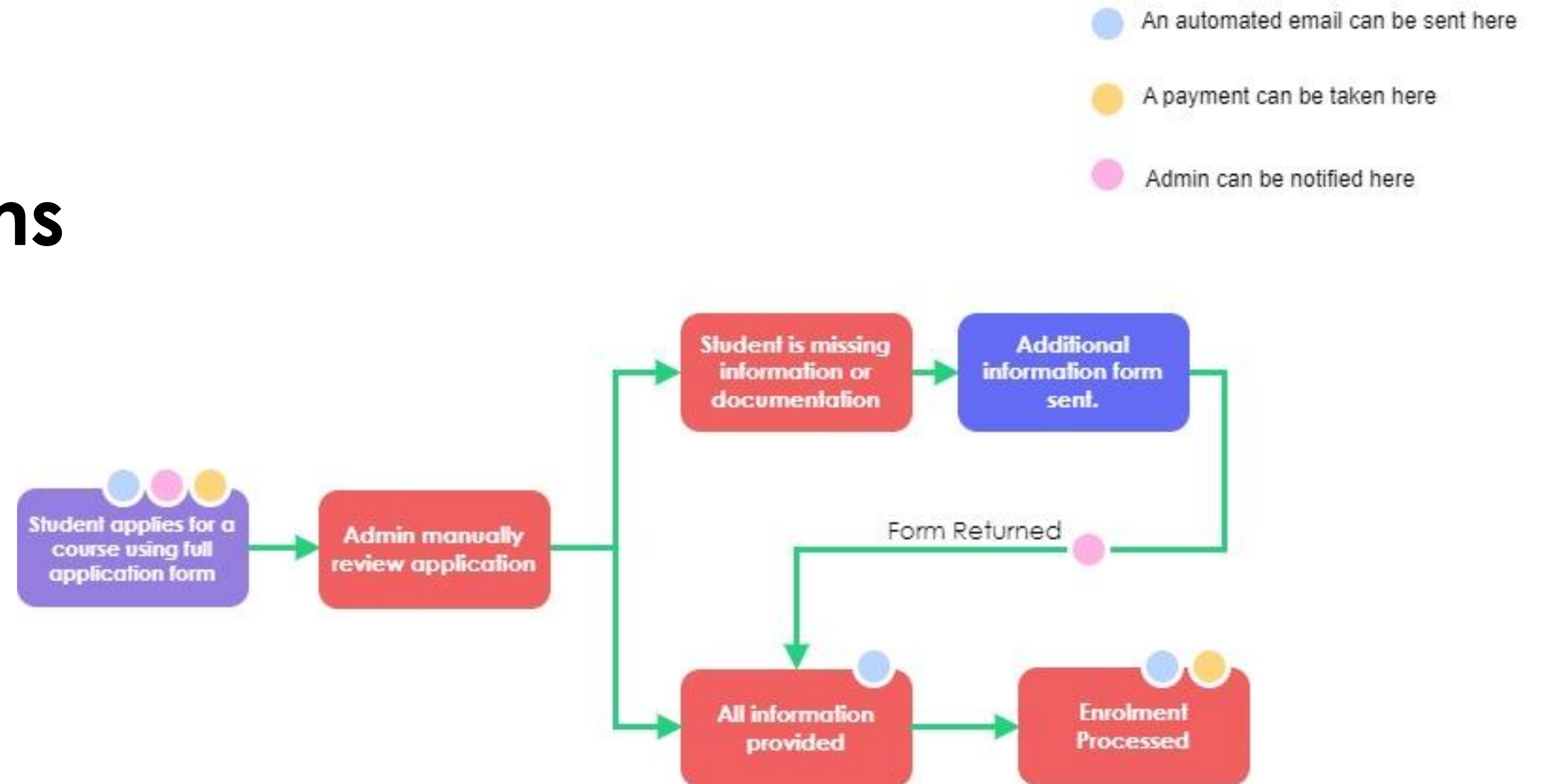
Let's take a look at:

- Feedback forms
- Attaching a form URL to an email
- Viewing a returned form





# Staff Notifications

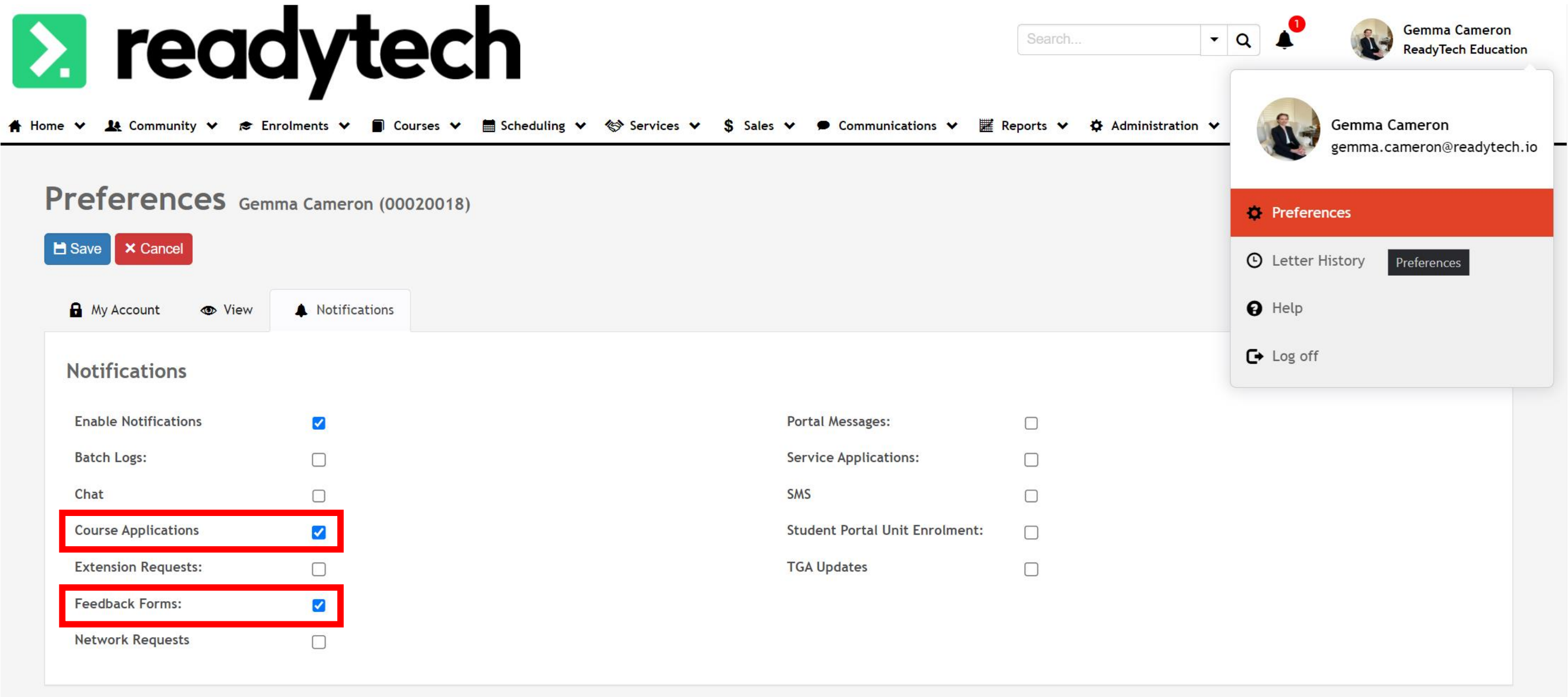


# Notifications

Course applications – receive notifications when a course application is submitted (manual or online)

Feedback forms – receive notifications when a feedback form is submitted

Staff name > Preferences



# Kanban View

Update preferences to always show Kanban view

Staff Name > Preferences

readytech

Search...

Bridgette Kaminski

ReadyTech Education

Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Preferences

Bridgette Kaminski (00020000)

Save

Cancel

My Account

View

Notifications

View

Search results per page100

Course Applications ViewListKanban

Service Applications ViewListKanban

Prospects ViewListKanban

Current Roles

RTO	Role	Description
ReadyTech Education	Administrator	Full System Access/Privileges

Save

Cancel

Bridgette Kaminski

Preferences

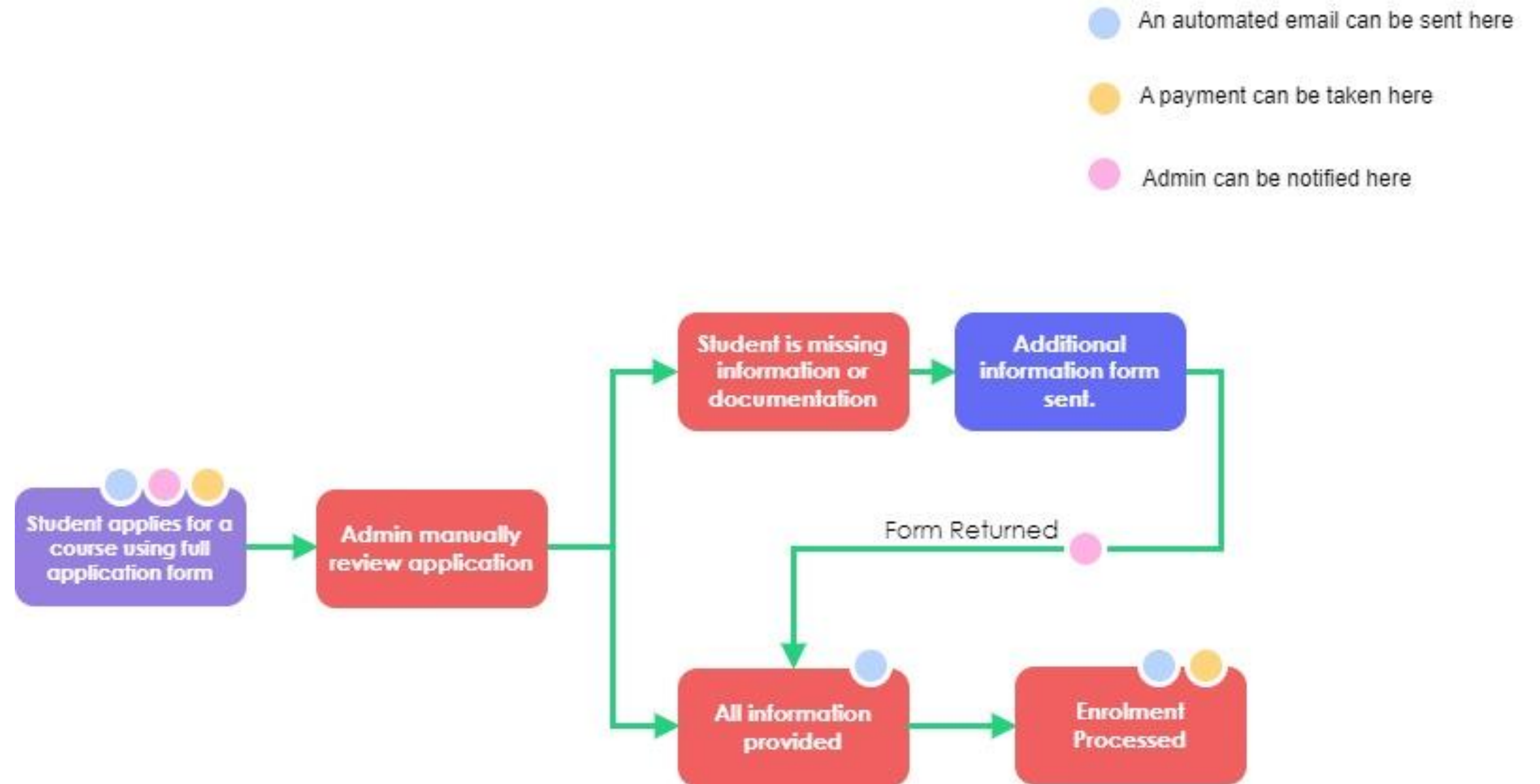
Letter History

Help

Log off



# Payments



# Payments

There are two options for taking payments

1. Payment collected during the initial online application form  
(done by 3<sup>rd</sup> party payment integration)
2. Payments collected post enrollment  
(external to the SMS via invoice or within the Student portal via payment gateway)

Today we are going to look at how to enable a payment on a course form with how to setup the cost being covered in a future session on finance

Administration > Forms > Course Forms > select form > Finance

The screenshot shows the 'Edit Form' interface with three tabs: 'Details', 'Settings', and 'Finance'. The 'Finance' tab is highlighted with a red border. The 'Details' tab shows 'Name: Long Application Form', 'Location: [dropdown]', and 'Branding: RT'. The 'Settings' tab shows 'Enabled: [checked]', 'Login: Optional', 'Disable Party Data Update: [unchecked]', 'Auto Confirm Enrolments: [unchecked]', 'Auto Confirm Services: [unchecked]', and 'Hide from Student Portal: [unchecked]'. The 'Finance' tab shows 'Enable Payments: [checked]', 'Payment Gateway Provider: [dropdown]', 'Payment Option Categories: [dropdown]', and 'Allow Pay Later: [unchecked]'.





# Duplicated Records



# Duplicated Records

## Kanban

Duplication Status - Will flag if two similar applications are submitted in the Kanban at the same time

Administration > Lookups > Course Applications Setup > Statuses

Kanban View will display the duplicate status

Courses > Applications

Course Application

Course Application Status > Details

Online Forms

Statuses

Status Details

Kanban Settings

Brands

Form Preferences

Status

Name: Duplicate

Colour: Duplicate

Kanban Status: New Applications

Default Email Template: ☐

Require Reason: ☐

Duplicate Status: ☒

Offer Accepted Status: ☐

Enabled: ☒

Email Templates

Location

Template

No location-specific email templates set up

Reasons

Reason

Enabled

No reasons set up

Search Results (Kanban)

Switch to List View

1 - 52 of 521 Page



New Applications 15	Under Review 5	Application Incomplete 1	Complete 31
<div>CA00064   OFR00064Emma SummarCSEREA00029Diploma of BusinessDuplicate</div>	<div>CA00055   OFR00055George SleenCSEREA00028Provide First AidMr Theodore AlanIn Progress</div>	<div>CA00060   OFR00060Jan SotherlandsCSEREA00031Advanced Diploma of Music [Music]Miss Bridgette KaminskiID Documents</div>	<div>CA00061   OFR00061Gabrielle StoneCSEREA00031Advanced Diploma of Music [Music]Miss Bridgette KaminskiEnrolled</div>
<div>CA00063   OFR00063Emma SummarCSEREA00029Diploma of BusinessApplied</div>	<div>CA00013   OFR00013Sam SmithersonCSEREA00025Certificate II in GovernmentProf Tom ThomasInterview</div>		<div>CA00059   OFR00059Jonathon SpiritCSEREA00035Certificate I in Agriculture [(smart fee)]Enrolled</div>
<div>CA00062   OFR00062Sara SpiritCSEREA00036Certificate I in Agriculture [(smart fee)]Applied</div>	<div>CA00009   OFR00009Spencer SmithCSEREA00024Advanced Diploma of Building DesignProf Tom ThomasInterview</div>		<div>CA00057   OFR00057Jullian SullivanCSEREA00029Diploma of BusinessMiss Bridgette KaminskiEnrolled</div>
<div>CA00058   OFR00058Sara SlytheCSEREA00035Certificate I in Agriculture [(smart fee)]</div>	<div>CA00006   OFR00006Sam Stark</div>		<div>CA00056   OFR00056Elliot SmithCSEREA00029</div>

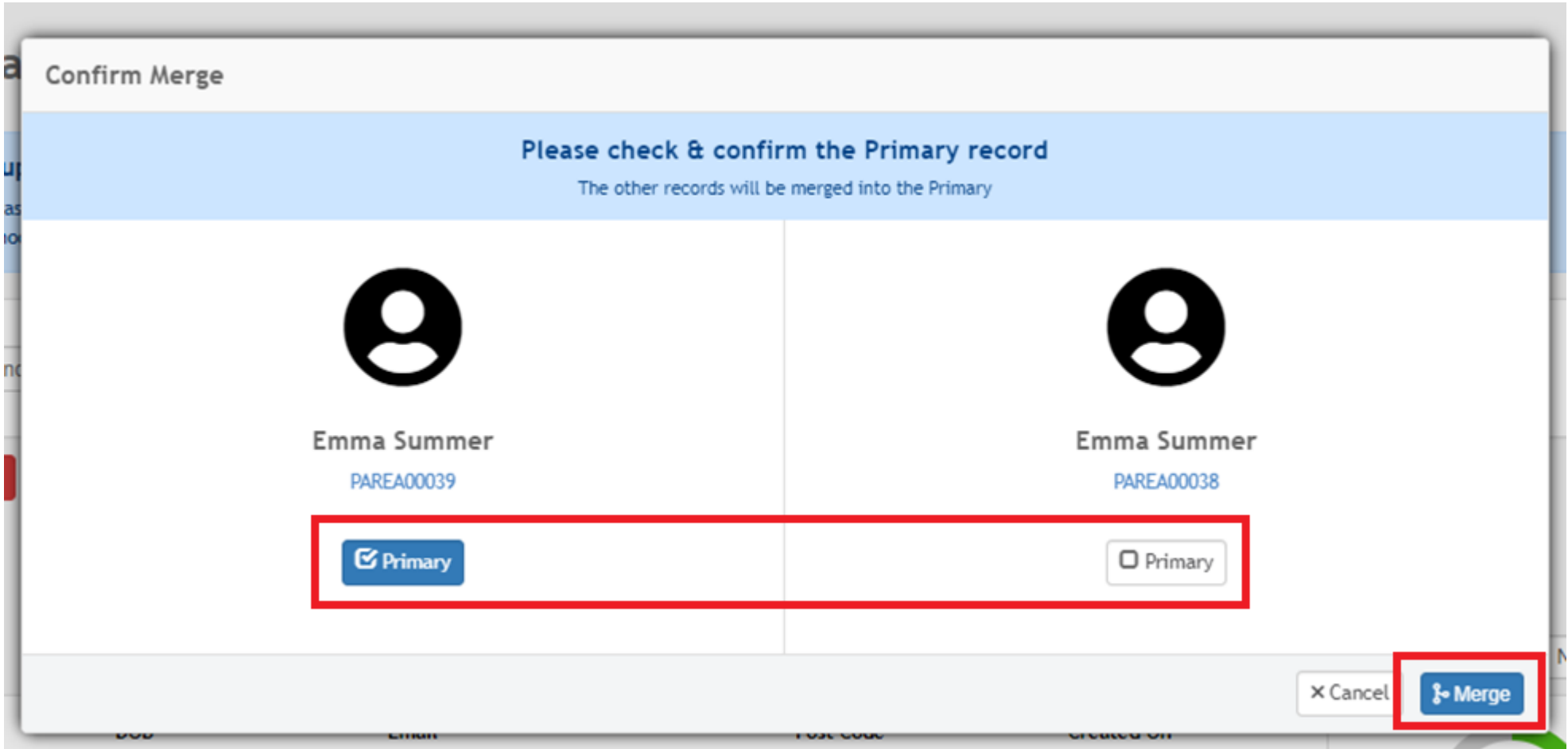
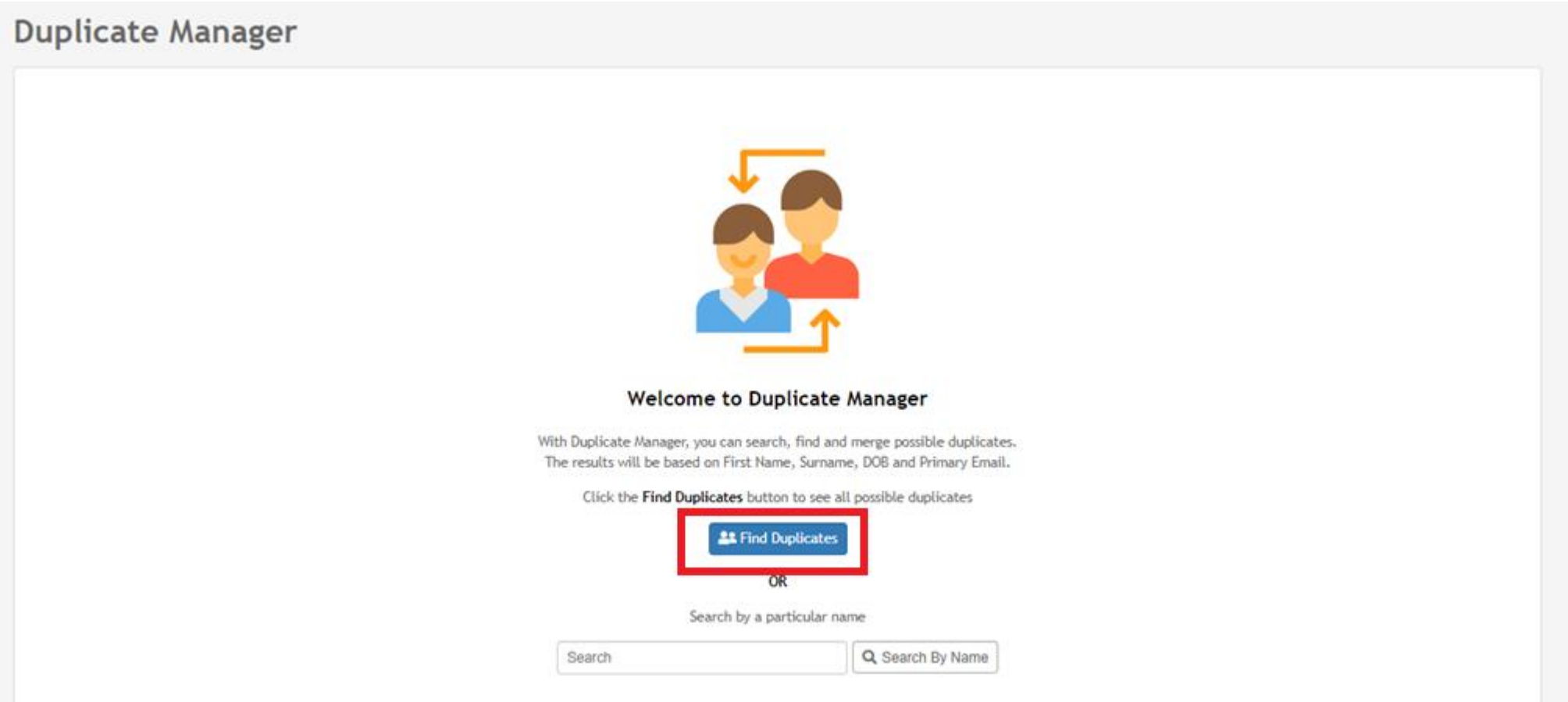
# Duplicated Records

## Duplication Manger

This will locate the duplicates and allow you to merge them, choosing a primary record

Administration > Audit / Logs > Duplicate Manager > Find Duplicates

 Emma Summer PAREA00038	DOB 12/10/1999	Email bridgette.kamisni+emmaMaySummer@readytech.io	Post Code	Created On 16/2/2023	<div><div><div>70% MATCH</div></div><div><div>Merge</div><div>Ignore</div></div></div>
 Emma Summer PAREA00039	DOB 18/10/1999	Email bridgette.kamisni+emmaMaySummer@readytech.io	Post Code	Created On 16/2/2023	



# Duplicated Records

## Merge Parties

Go to Community > List All > Select Student > Admin > Merge Parties

Search for the party record and select them from the list

Merge Parties

Emma Summer (PAREA00039)

Search and select the Party to be merged with Emma Summer (PAREA00039)

Emma Summer

Filters

Saved Filters

Search

Save

Clear

Search Results for ''

1 - 1 of 1

1 Page

Party ID	Name	Known By	Gender	DOB	Email	Phone	Nationality
PAREA00040	Emma Summer		Female	12/10/1999	bridgette.kaminski+emmaMaySummer@readytech.io		

1 - 1 of 1

1 Page

Select

Merge Parties

Emma Summer (PAREA00039)

Search and select the Party to be merged with Emma Summer (PAREA00039)

First Name, Surname, Known By, ID, Email, Phone, Identification

Filters

Saved Filters

Search

Save

Clear

Search Results for ''

1 - 33 of 33

1 Page

Party ID	Name	Known By	Gender	DOB	Email	Phone	Nationality
PAREA00033	Sam Adam		Female		bridgette.kaminski+SamAdam@readytech.io		Not Stated
PAREA00031	Amy Adams		Female	10/8/1991	Bridgette.kaminski+amyAnnAdmins@readytech.io		Not Stated
PAREA00018	Bridgette Admin				bridgette.kaminski+admin@readytech.io		Not Stated

Party > Merge Summary

You are about to merge "Summer, Emma" to "Summer, Emma". Before you do, it is worth using the Audit Trail to extract the details of the 'secondary' record for your future reference. Once the records are merged, the process cannot be reversed.

Please confirm details below:

Merge

Cancel

Secondary (will be deleted)

Party ID

PAREA00040

Title

Summer

Surname

Emma

First Name(s)

Female

Gender

12 October 1999

Date of Birth

Email

Contact Method

bridgette.kaminski+emmaMaySummer@readytech.io

Primary Address

\$0.00

Primary Phone

Balance

Roles

Primary (will inherit secondary data)

Party ID

PAREA00039

Title

Summer

Surname

Emma

First Name(s)

Female

Gender

18 October 1999

Date of Birth

Email

Contact Method

bridgette.kaminski+emmaMaySummer@readytech.io

Primary Address

\$0.00

Primary Phone

Balance

Roles

# Lets go do it!

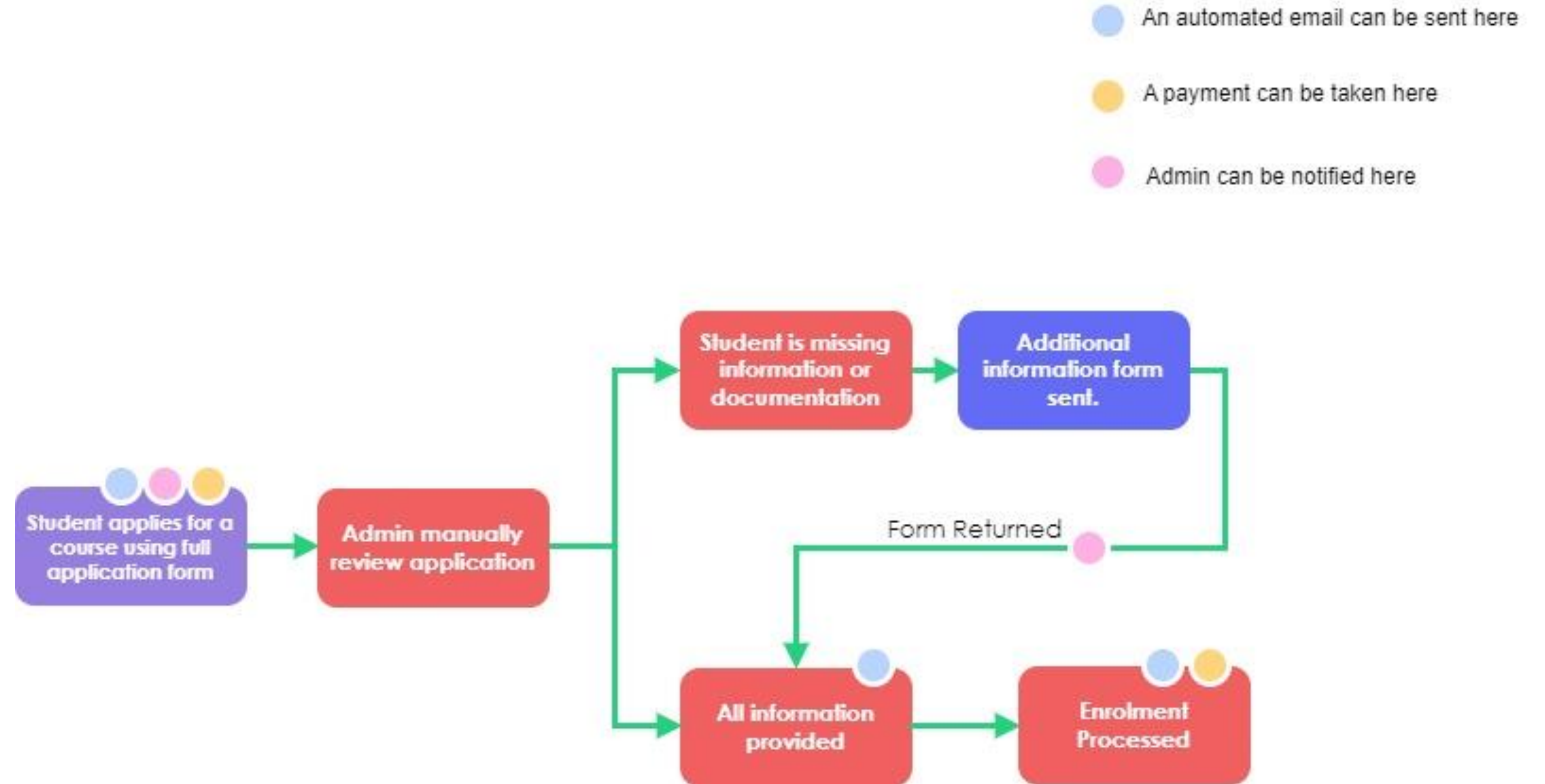
Let's take a look at:

- Enable staff notifications
- Duplicate records





# Walk Through



# Lets go do it!

Let's take a look at:

- Walk through full online enrolment process







# ReadySMS Automated Workflows



ReadyTech Education

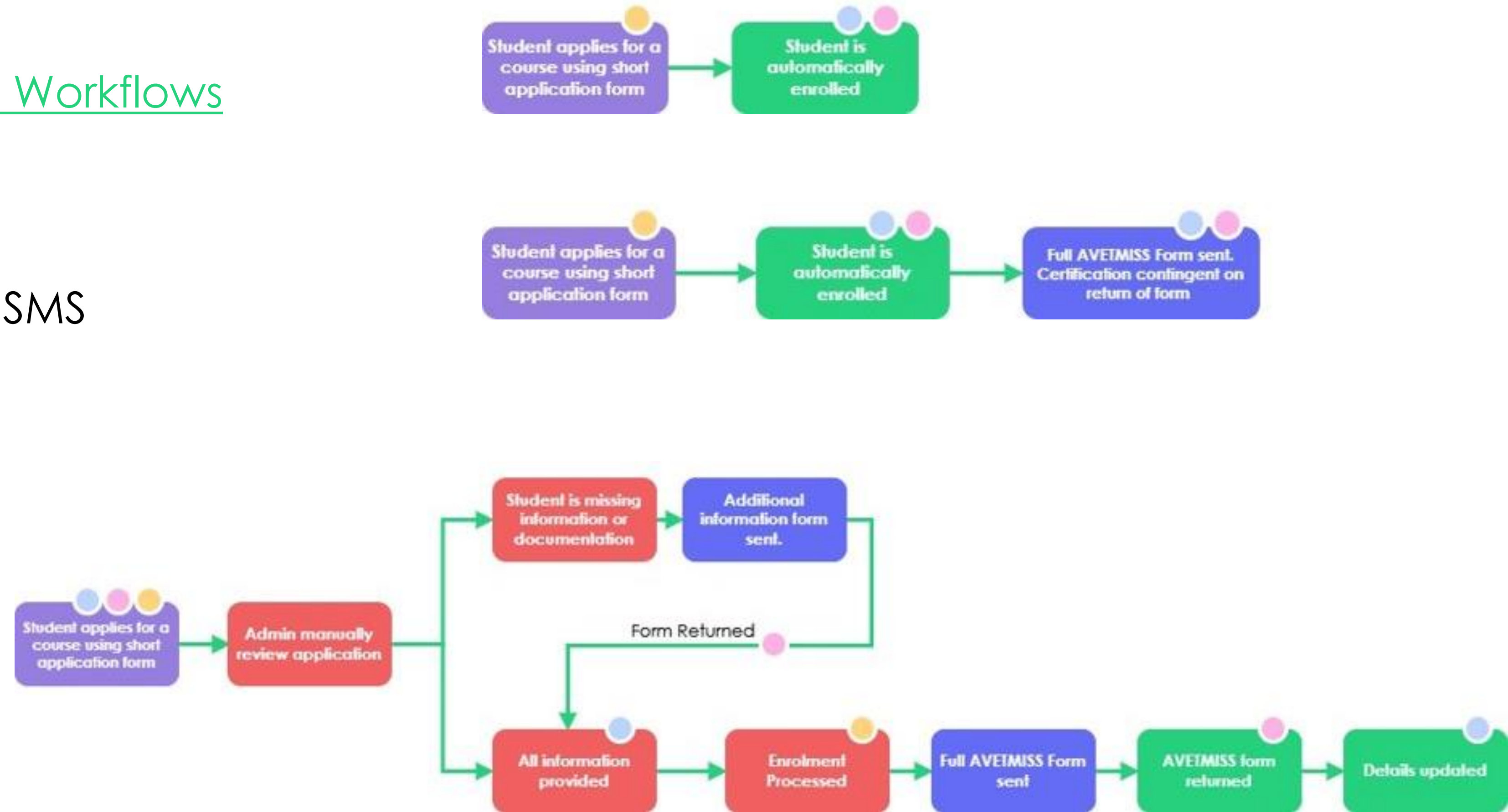


# ReadySMS Automated Workflows

## Where to from here?

Read the [ReadySMS Automated Workflows article](#)

- How to select your workflow
- Setting up the workflow in the SMS





# Summary

## What have we done today?

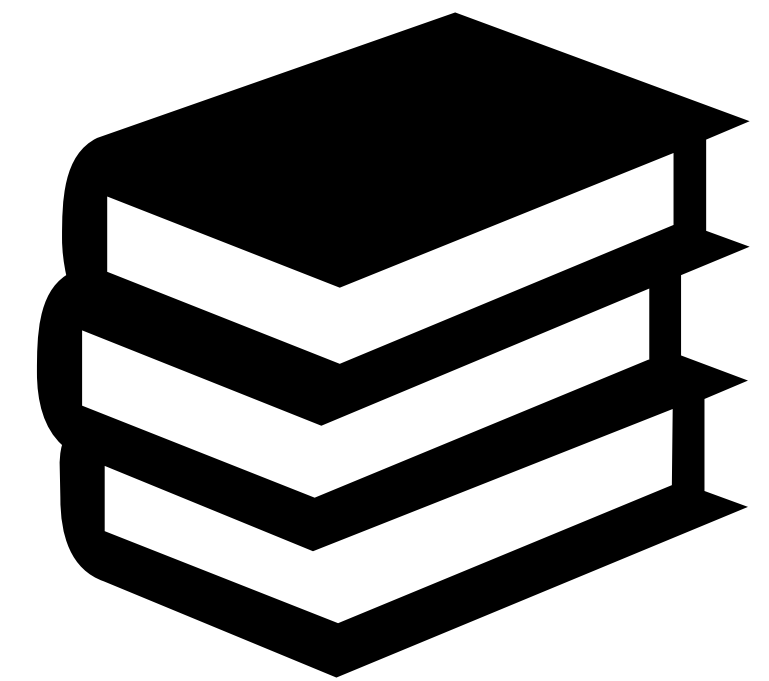
- Example workflow
- Practically setting up the workflow
  - Online course forms
  - Kanban
  - Automated Communication
  - Additional Forms (Information/AVETMISS)
  - Staff Notifications
  - Payments
- Duplicate records



# Action Items

## What do I need to do after today's session?

- Work through the [ReadySMS Automated Workflows article](#)
- Bookmark the [Template Field Mappings Index](#)
- Start considering which workflow is most appropriate for your organisation
- If you're using, set up:
  - Online course form/s
  - Kanban status'
  - Course application status'
  - Email templates to link to course applications
  - Additional forms (Information/AVETMISS)
  - Staff Notifications – if required

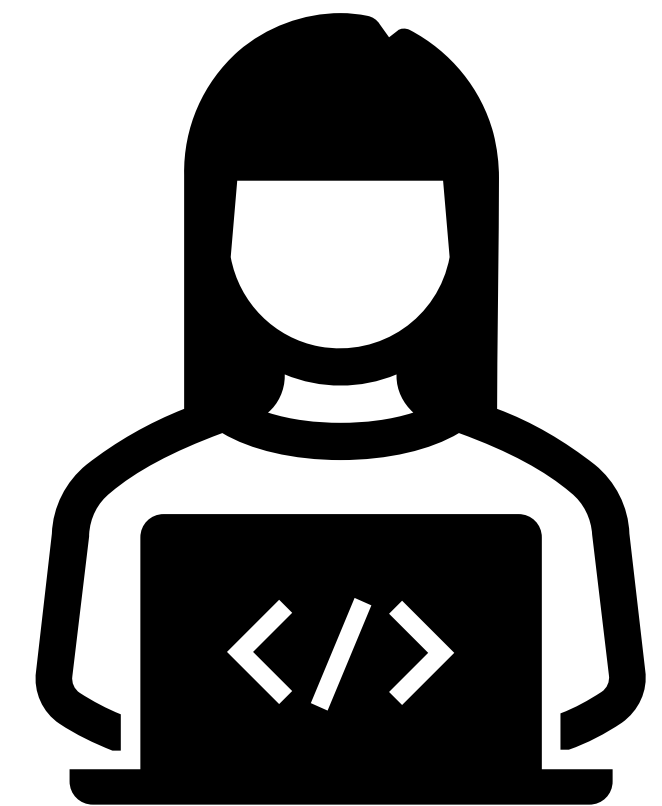


# Enjoyed today's session?

[Please navigate to article here](#)

Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions



# Thank you

For more information please contact:

## Support

- E: [support@ewp.readytech.io](mailto:support@ewp.readytech.io)
- P: 02 9018 5525

## Onboarding

- E: [customeronboarding@ewp.readytech.io](mailto:customeronboarding@ewp.readytech.io)