



RIO EDUCATION

Standard Process Flows

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Implementing RIO: Process Flows

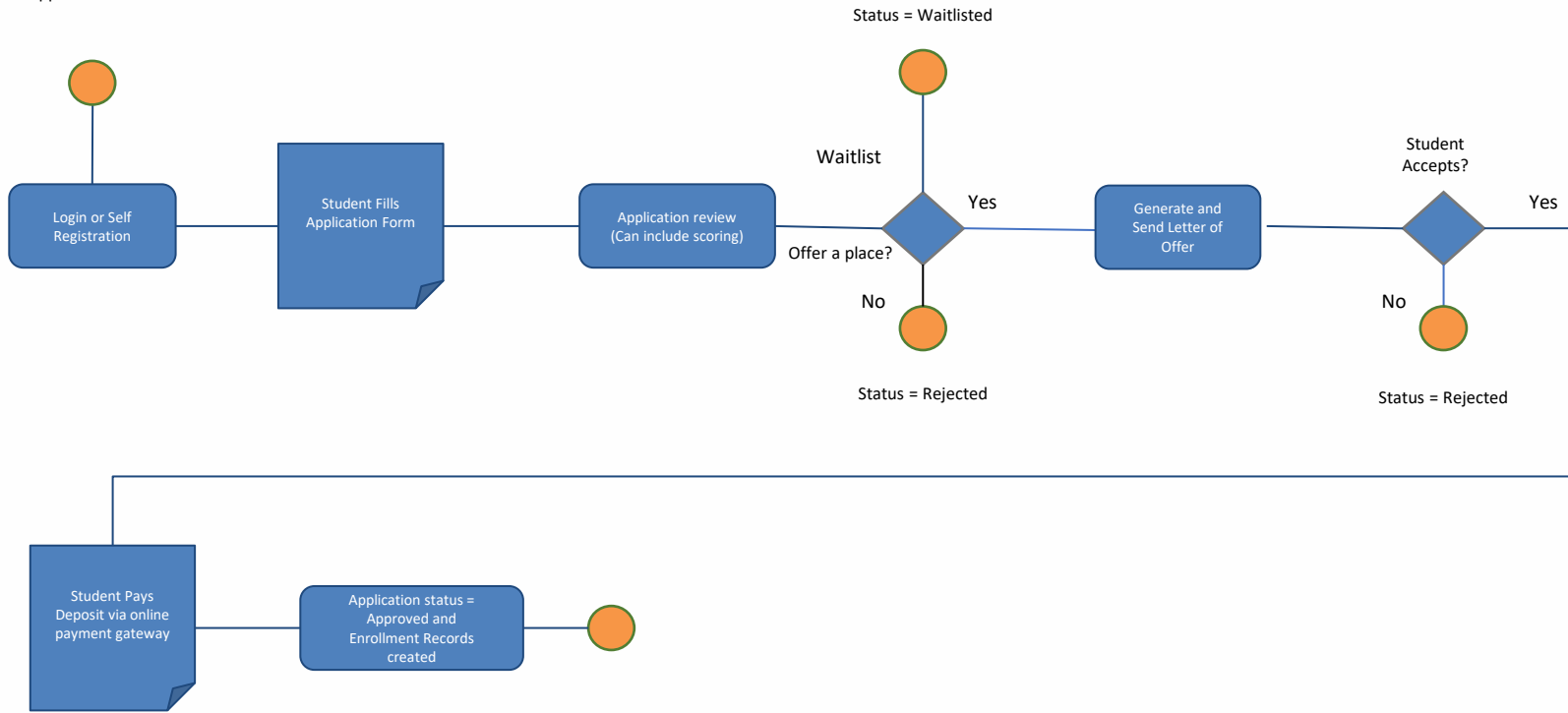
Looking at more detail around RIO Education modules

- Out of the Box Flows that RIO Provides
- Highlighting where some customisation is normally Required

Program Application



Student Starts
Application Form

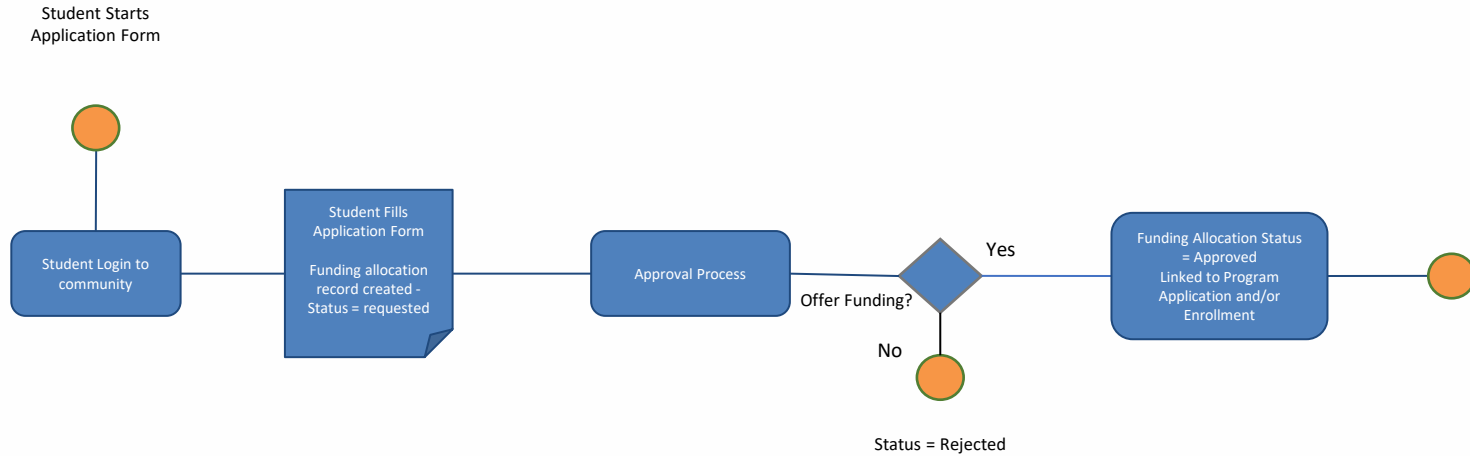


Program Application - Configuration Tasks



- Application form setup - process flow. RIO has some pre-built components that we can share including:
 - Portfolio manager
 - File upload component
 - Referee component
- Review process configuration / setup - E.G set the stages of an application if they are different from Standard, Set any custom scoring requirements
- Template modification for Letter of Offer and confirmation of enrollment. S-Docs standard template provided.
- Payment processing and Deposit handling (Payment gateway setup). We have used Payments2Us and can share some templates if that tool is used.

Funding Application (Scholarship etc)



Funding Application - Configuration Tasks

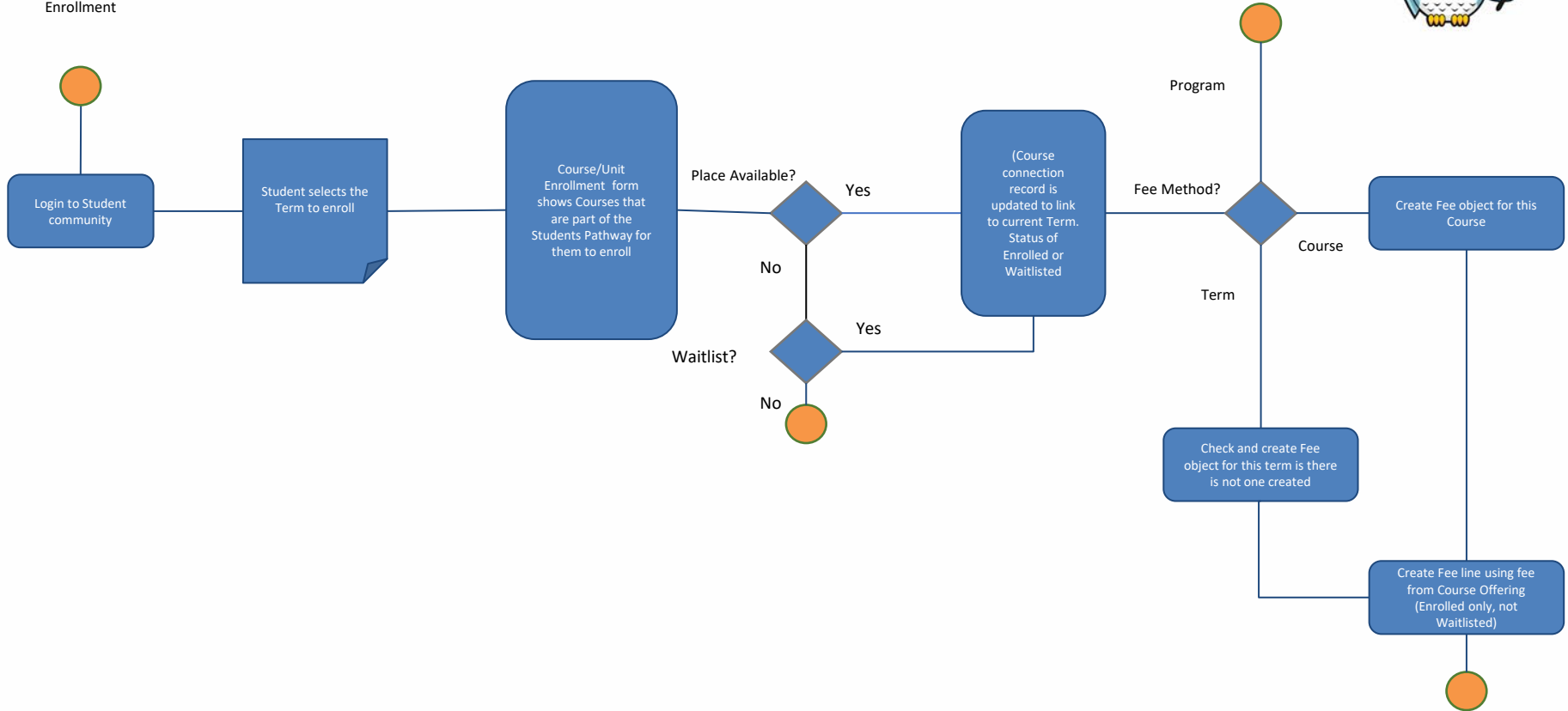


- Funding records setup - Types of Funding (Scholarship, Discount)
 - Funding rules (Amount per student, Amount per term etc) - Data setup/data load
- Application form(s) setup - process flow. Optionally funding applications can be part of program enrollment forms.
- Approval process configuration, including any custom automated approval/rejection criteria. An example of an automated criteria:
 - Applicants with family income over a certain threshold may not qualify
 - Non indigenous students may not qualify for an indigenous scholarship.

Course Enrollment (by student)



Student Starts Enrollment



Course Enrollment - Configuration Tasks

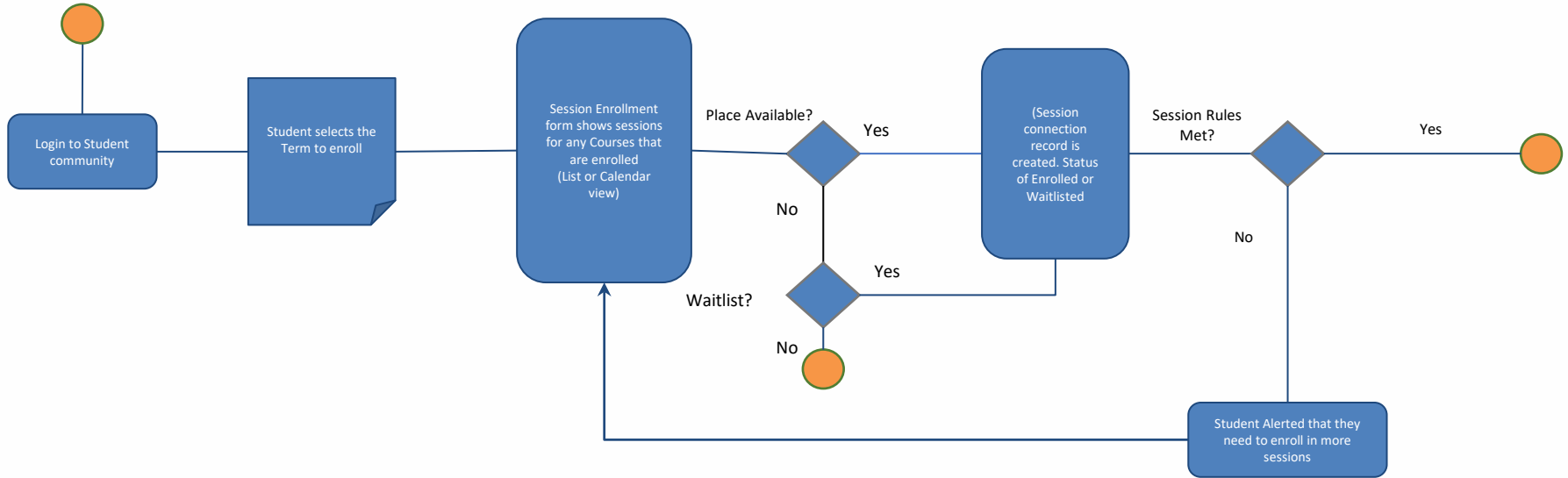


- Fee setup - Need to ensure that the correct fee processes are set
 - For Term (accumulated course fees) - Ensure that all course offerings get the right fees allocated.
 - For Term (Set Fee) ensure that the custom trigger to create the fees is created based on the school requirements
 - For Variable fees (X amount full time vs, per course for part time) set the rules for determining the applicable fee type.
- Pathway Setup - Need to ensure that the pathways are all set correctly for each program.
 - Determine if Auto Enrollment components are required and configure them. Determine if the student selects the next term to enroll, or that is automated.
- Prerequisites Setup
 - ensure all the correct prerequisites are set for the units.
- Course Offering Session Instructions setup

Session Enrollment (by student)



Student Starts Enrollment



Session Enrollment - Configuration Tasks

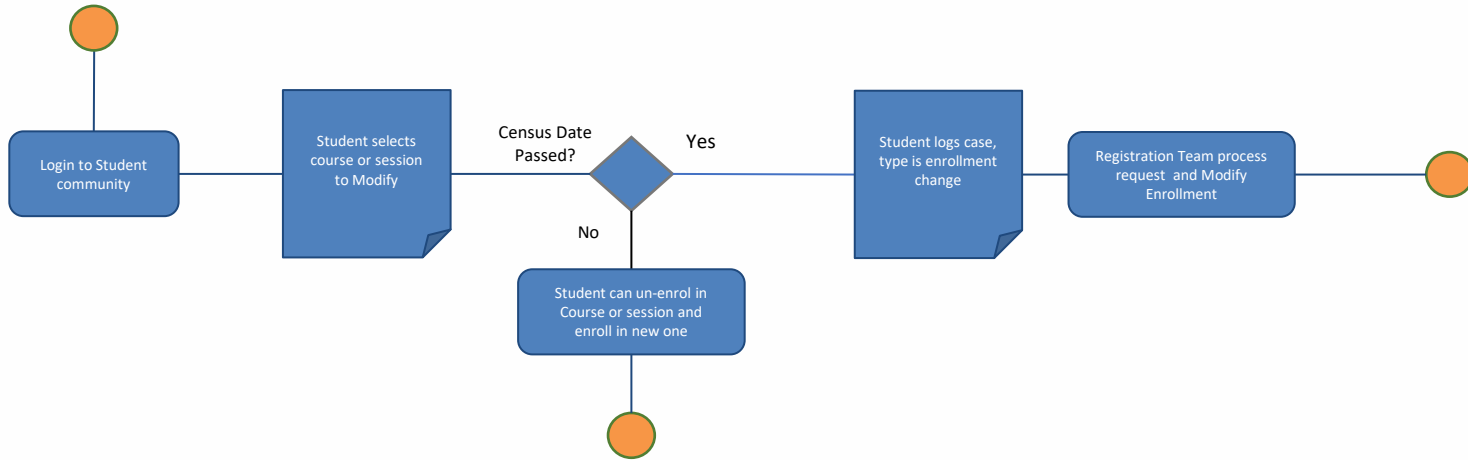


- Course Offering Session Instructions setup
- Auto Enroll vs Manual into sessions decision / Setup
- Waitlist rules and process setup. Currently there is no default process for waitlisted students to be offered places when they come available. That needs to be setup per school based on the process they want.

Course/Session Enrollment Modification request



Student Starts
Enrollment



Enrollment Modification- Configuration Tasks

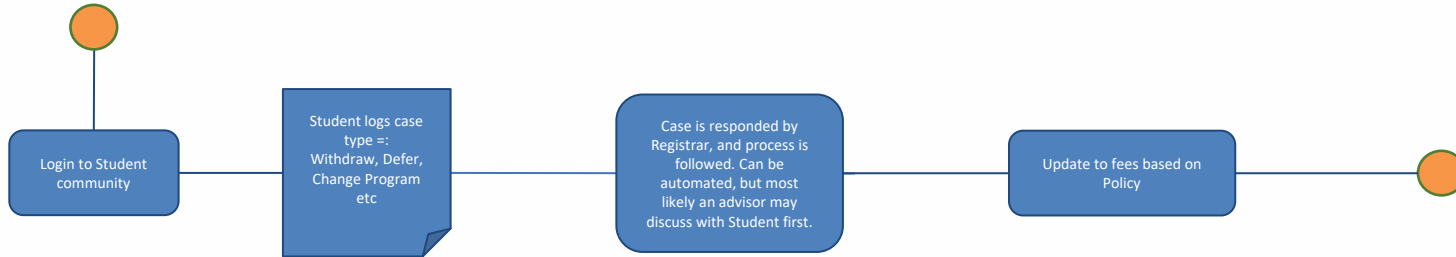


- Census dates and Enrollment open/Close Dates configured
- Case Types configured, Case queues set with the correct users.
- Funding rules defined for changes after census - E.G
 - is there a penalty for withdrawing and changing.
 - If invoice is already generated does another need to be manually sent

Program Enrollment Modification request



Student Starts
Enrollment

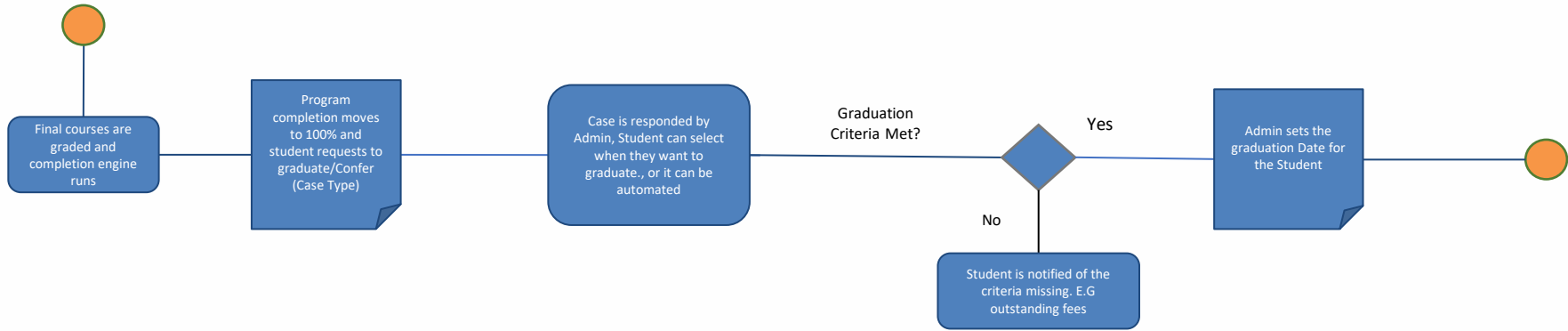


Program Enrollment Modification- Configuration Tasks



- Census dates and Enrollment open/Close Dates configured
- Case Types configured, Case queues set with the correct users.
- Funding rules defined for changes after census - E.G
 - is there a penalty for withdrawing and changing.
 - If invoice is already generated does another need to be manually sent
- For program changes, automation configured from the case status, to trigger the change in program. There are pre-defined triggers in RIO that can be used to transfer the grades from one program to the other (Part of the credit recognition triggers).

Program Completion (Graduation)

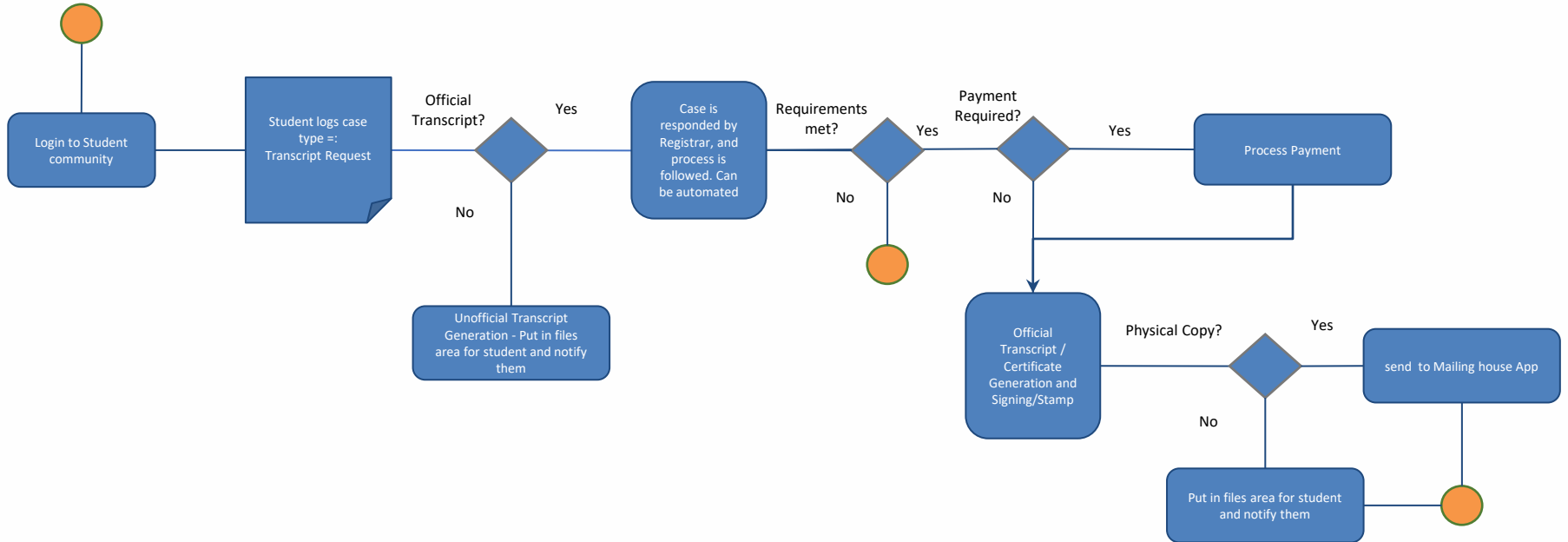


Program Graduation- Configuration Tasks



- Determine if graduation should be automated on completion, or requested by students.
- Case Types configured (Graduation), Case queues set with the correct users.
- Completion/Graduation rules defined: e.g
 - outstanding fees - may block graduation
- Notifications for students. - May be success plans if SAL is used, or a notification with details of the steps required to graduate.

Transcript/Certificate Generation request

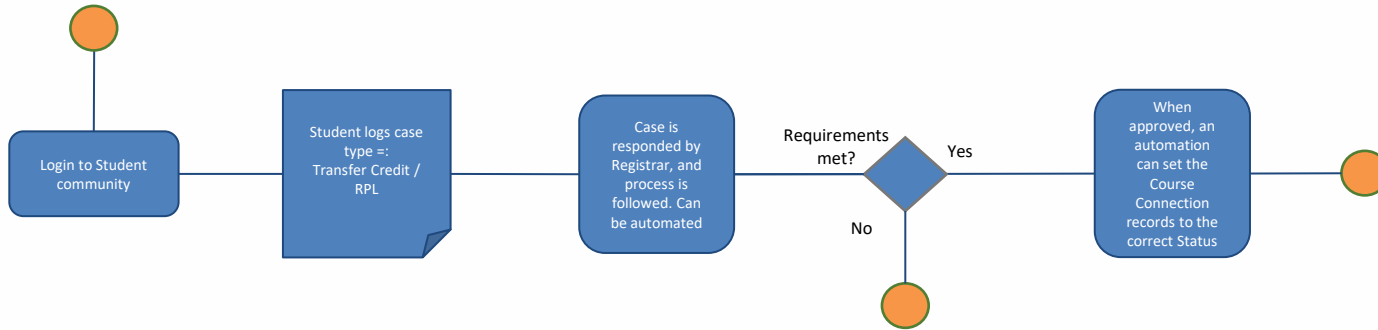


Transcript / Certificate- Configuration Tasks



- Edit/Generate templates (S-Docs provided as base)
- Configure requirements (No debt etc). Same as for Graduation
- Case Types configured (Transcript / Certificate request), Case queues set with the correct users.
- If Physical printing / Mailing required then integrate to app to handle that.
- Notifications for students. - send notification, possibly through a case response.
- Possibly automate/trigger from graduation request process?
- Setup payment processing

Credit Transfer / RPL request



Credit Transfer / RPL- Configuration Tasks



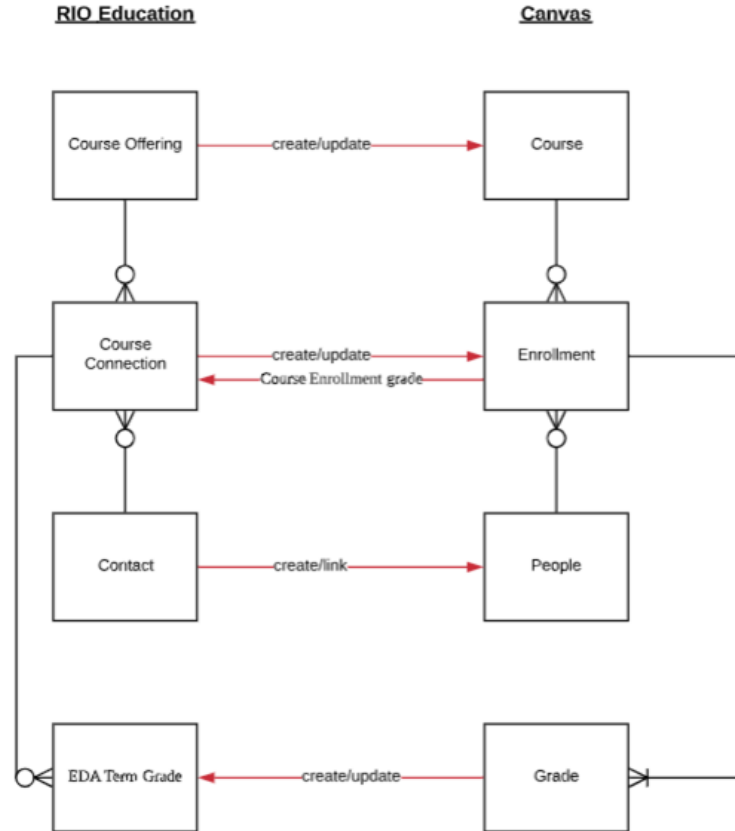
- Determine request process (One RPL per case, or Multiple)?
- Case Types configured (Credit Transfer), Case queues set with the correct users.
- Some schools may want to have a list of predefined schools and courses that they match automatically with Credits. If this is the case, then the Student can select the courses from a list that they have completed and an automation can set them, when the transcript is verified.
- Option - Students pick from a list of courses in the program they are enrolled that they want credit for. Admin staff just verify/approve the request based on documented proof, and the system automates the creation of the records.
- Notifications for students. - send notification, possibly through a case response.

Canvas / LMS Integration flows



The following are the standard (Common) synchronisations:

1. Salesforce course offering > create/link > Canvas course
2. Salesforce contact > create > Canvas people
3. Salesforce course connection > create/update > Canvas enrollment
4. Canvas Assignment grade > create/update > Rio Ed Grade (along with Term grade if not present)
5. Canvas Course enrollment grade > update Course Connection grade points

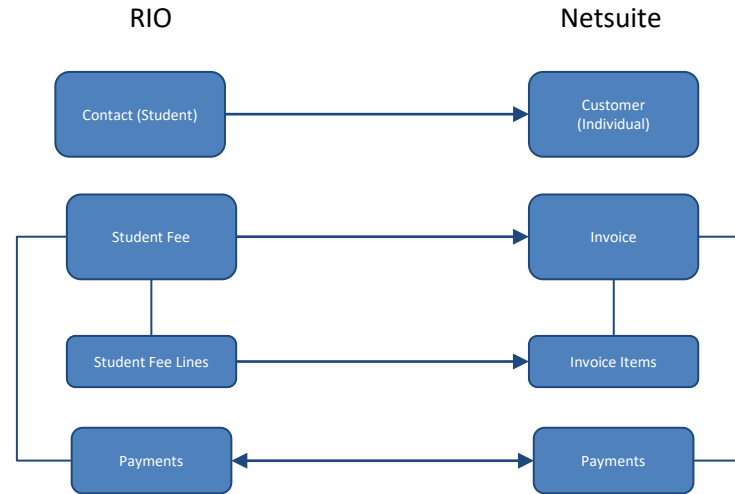


LMS Integration - Configuration Tasks



- RIO Connect has preconfigured flows as per the previous slide.
- If another integration tool is used then the pattern can still be followed.
- By default we normally just take the final grade into the Course Connection.
- The Grade Settings are used in the course connection to map between the grade score (Numerical value, normally out of 100) and the Grade Value (A, A+ or Credit, Distinction etc)

Finance Integration flows - Netsuite



- Fees are generated / Mastered in RIO
- PDF Invoices can be generated in RIO or Netsuite and sent to students.
- See video example here



Need Help?



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Log a case by emailing
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