

K12 Enrollment Service UX Blue Print

User Information Background Expectations	Family signs up for Online School		User Information Background Expectations
	Margie chooses to enroll in an online school.	Margie is looking forward to her daughter's first day of online school. "I regret there she needs to select a school, request permission to transfer, select & upload documents to enroll and set up her equipment before school can start."	
User Information Background Expectations	1. Margie does a google search and selects K12.com because her neighbor's child also goes to that online school. She is confident in her neighbor's choice.	👍	User Information Background Expectations
	2. Margie selects "enroll" and is taken to K12.org site K12.com & creates a legal guardian account and is taken to PParentK12.com. (1 min)	👍	
User Information Background Expectations	3. Margie returns Ohio Virtual Academy and is presented with CHSA forms and documentary requirements at CHSAK12.com. (20 min)	👍👎	User Information Background Expectations
	4. Margie doesn't complete the enrollment process because she needs to find & then upload her forms. Her daughter's hour time & is frustrated. (10 min)	👎👎	
User Information Background Expectations	5. After several hours she receives an encouraging call from an enrollment rep who answers some of her questions. She feels relieved. (20 min)	👍	User Information Background Expectations
	6. She contacts her local school district to inform them of her desire to enroll in CHSA and asks them to send a transfer document to CHSA. The school already knows what address to send the document to.	👍👍	
User Information Background Expectations	7. The district's head teacher or not the document has been received and calls customer service who tells her it has not get arrived but to give it 5 more days.	👍👎	User Information Background Expectations
	10 days later, she returns to K12.com. logs in and is taken to her information for the CHSA enrollment. She sees that the school has sent the document and it was accepted. She completes uploading her documents. (20 min)	👍	
User Information Background Expectations	9. She awaits an email response from K12, or CHSA, who's uncertain who, about the acceptance of her 9-year-old daughter into the school.	👍	User Information Background Expectations
	16. She logs in at K12.com and is taken to the Parent Portal where she confirms that all of her documents have been received and accepted.	👍	
User Information Background Expectations	13. 10 days later she receives an enrollment acceptance email from K12, tells her she'll receive a computer & printer & invites her to online summer camp. She doesn't have time to take her daughter through an online camp and hopes she can understand the program later.	👍	User Information Background Expectations
	2. A week later the CHSA principal sends her an email welcoming her and her daughter by name, to the school & tells her the start date. The email points to their policy page at CHSA.com	👍	
User Information Background Expectations	13. It's 2 weeks before the first day of school & she hasn't received the computer or printer. She is panicking and calls K12's customer service.	👍👎	User Information Background Expectations
	14. Customer service tells her the computer & printer and all her child's texts and workbooks will be shipped tomorrow and arrive in 7 days.	👍	
User Information Background Expectations	16. Margie receives an email informing her that her supplies will arrive tomorrow and she is to use her student's ID number to log into the computer	👍	User Information Background Expectations
	16 days later Margie receives a box with a computer, printer and 50 other items her child will use for school. She's grateful & overwhelmed.	👍👍	
User Information Background Expectations	17. Margie opens the computer and is challenged by how to log in. She finds the nuclear email and is reminded to use her daughter's student ID number.	👍	User Information Background Expectations
	18. She uses it to log into the computer and is presented with 3 clickable icons. One is labeled "Open Portal". It is an advertisement for her student with instructions on how to set up the BVE, and the printer and then how to log into the school.	👍	
User Information Background Expectations	19. Margie is able to successfully follow the directions, but she's puzzled because school starts in a few days and she still doesn't know what classes or teachers are assigned to her daughter.	👍👎	User Information Background Expectations
	-1. Marketing team has optimized the SEO so that the K12.com website appears near the top of the page		
User Information Background Expectations	-2. The Enrollment team receives her enrollment request in their Salesforce portal and her account is assigned to an Enrollment Manager		
	-3. Salesforce communicates with NetSuite (CHSA) that there is an enrollment in the pipeline for CHSA		
User Information Background Expectations	-5. An enrollment associate is assigned to call Margie about her application and offer assistance and encouragement in the enrollment process.		
	-6.3 The agent records in Salesforce the call record		
User Information Background Expectations	-7. The customer service system recognizes her phone number and assigns her to an enrollment agent.		
	-15. The agent confirms her information with Salesforce and notes that the transfer document has not been received. He tells Margie about average turn around times and encourages her.		
User Information Background Expectations	-17.2 After the call the agent enters a note in Margie's record about the conversation and it is saved in Salesforce		
	-18. The student transfer document is received, scanned and associated with Margie's enrollment record.		
User Information Background Expectations	-19.1 The document is assigned to an enrollment evaluator for review via NetSuite. Once reviewed and approved the document status is changed to assigned to Salesforce.		
	-19.2 Once the enrollment form is completed it is sent to an enrollment evaluator for review in NetSuite. The evaluator reviews and approves the documents. The status of the enrollment changes to approved and it is opened in the CHSA Enrollment Manager for review.		
User Information Background Expectations	-19.3 The CHSA Enrollment Manager reviews the application to reconcile against the school's enrollment limit for her Exam day. She approves enrollment in NetSuite, notes that this is a new student, just a new enrollment, and the data from NetSuite is copied and transferred to TVA. The NetSuite enrollment updates the Salesforce record for Margie to enroll later		
	-19.1. Salesforce initiates a email letter to welcome Margie and her daughter and suggests they join an online summer camp to learn how to use the Online School during their summer vacation.		
User Information Background Expectations	-19.1.3 TVA initiates a record in Jira for the hardware group to confirm Ohio Dept. of Ed standards for hardware equipment and generates a packing list of CHSA items.		
	-19.1.2 The Jira Packing List queries the hardware department to image a laptop specifically to Margie and CHSA's specifications. The hardware department installs the image onto a laptop. Upon completion, the hardware associate updates the completion status in Jira and puts the laptop on the loading dock, attaching a label with Margie's address, serial, etc.		
User Information Background Expectations	-19.1.3 The packing list is assigned to a printer in Jira who pulls together the package, signs a label sent in from TVA and enters the shipping date into Salesforce. It is waiting pickup from the shipper on the dock.		
	-19.1.2 Customer service recognizes Margie's number and sends her to an enrollment associate. He confirms her information then looks into Salesforce and notes that the shipment will leave tomorrow. He estimates the typical arrival time and reassures her that her supplies are on the way.		
User Information Background Expectations	-19.1.1 The customer service agent records the conversation in Salesforce		
	-19.6. Upon picking up the shipment, the loading dock records the departure date in Jira, Salesforce & TVA.		
User Information Background Expectations	-19.1.1 Salesforce automatically sends Margie an email informing her of the shipment with instructions on how to log in to the computer.		
	-19. The shipper's system communicates with the shipping department about the arrival of the computer. The shipping department batch loads the data into NetSuite which informs Salesforce of the computer's arrival.		
User Information Background Expectations	-19.7 Margie sees the email/placement for her personal email to receive log-in instructions.		
	-19.8. Margie's login to the computer initiates a call to the Hardware Dept.'s log system that the student has accessed the computer at a specific date and time.		
Background Technology Product Resources	Assessment	System	Team
	-19.1 K12.org site communicates to Salesforce to create a new legal guardian account for Margie. The data collected in the form is stored in their legal guardian account.	Web Portal, Salesforce	Applicants, Marketing & Enrollments
Background Technology Product Resources	-19.2 States her name assigns the account to an Enrollment Manager and puts her status status to "enroll" in an enrollment's.	SalesForce	Enrollments & Applicants
	-19.3 PParentK12.com communicates Margie's selection of CHSA to Salesforce which in turn communicates via NetSuite to CHSA Enrollment Admin a enrollment is in the enrollment pipeline.	PParent, NetSuite, CHSA NetSuite	Enrollments CHSA
Background Technology Product Resources	-19.4 Upon entering CHSA, Margie is taken to CHSAK12.com & presented with documentary requirements for enrolling in CHSA	CHSAK12.com	Enrollments
	-19. An enrollment associate is in the Salesforce daily advice panel and is used to call Margie. The associate selects the link, and her data appears while the computer reads the phone call. The associate discusses her enrollment and answers any questions she has. The associate encourages her to continue.	SalesForce Associate's view	Enrollments Advisors
Background Technology Product Resources	-19. After the call the enrollment associate records relevant information in the notes section for Margie's enrollment account.	SalesForce Enrollment Account Notes	Enrollments Advisor
	-19. The enrollment agent answers the call with Margie's Salesforce enrollment data in front of her. He confirms her identity via her phone number, email and address.	Phone system, Sales Force	Enrollments Advisor & Applicant
Background Technology Product Resources	-19.1 Looks at her Salesforce enrollment account for her document status for the transfer order from her local school and tells her it has not been received.	SalesForce	Enrollments Advisor & Applicant
	-17.2 After the call the enrollment associate records relevant information in the notes section for Margie's enrollment account.	SalesForce	Enrollments Advisor
Background Technology Product Resources	-18. The student transfer document is received, scanned, uploaded into NetSuite, attached to her enrollment account and the receipt status is changed to received. This status change also occurs in her Salesforce enrollment record.	Screen Scan, NetSuite, Salesforce	Enrollments Mail team
	-19.1 NetSuite runs the transfer document to an enrollment evaluator. She reviews it & confirms it is complete and approve it. The approval is imported to NetSuite via Salesforce. This initiates a change in status for Margie's enrollment account, indicating the transfer document is approved inside Margie's view of her account.	NetSuite, SalesForce, Applicant View Web Portal	Enrollment Document Evaluator
Background Technology Product Resources	-19.2 Margie completes her enrollment application online which updates her record in NetSuite. Once she submits "submit enrollment application" the information is stored and transferred to NetSuite for an CHSA Enrollment Manager to review the attached documents for accuracy & completeness.	Applicant Web Portal, SalesForce & Applicant	Applicants & Enrollment Evaluator
	-19.3 The CHSA Enrollment Manager pulls up her Exam document for projections and searches for Margie's name in TVA to see if she is enrolling. She approves Margie's application in NetSuite which updates Salesforce and she initiates a transfer of relevant data to TVA as an CHSA student of record for Margie and her daughter.	NetSuite, TVA, SalesForce	CHSA Enrollment Manager
Background Technology Product Resources	-19.1.1 the CHSA Enrollment Manager pulls up her Exam document for projections and searches for Margie's name in TVA to see if she is enrolling previously. A Student ID number is assigned to Margie's daughter. A Legal Guardian ID number is assigned to Margie. She approves Margie's application in NetSuite which updates Sales Force and she initiates a transfer of relevant data to TVA as an CHSA student of record for Margie and her daughter.	Exam App, TVA, SalesForce, Applicant Portal	CHSA Enrollment Manager
	-19.6. Margie receives the accepted date in her view after enrollment account which has updated to enroll a new look & feel associated with CHSA.	Applicant	Enrollment
Background Technology Product Resources	-19.7 Salesforce initiates a email letter to welcome Margie and her daughter and suggests they join an online summer camp to learn how to use the Online School during their summer vacation.	Applicant	Enrollments, CHSA & Marketing Teams
	-19.1.3 TVA initiates a record in Jira for the hardware group to confirm Ohio Dept. of Ed standards for hardware equipment and generates a packing list of CHSA items.	Jira Ticket System & Computer	Jira Development & Hardware Acquisition team
Background Technology Product Resources	-19.1.2 The Jira Packing List queries the hardware department to image a laptop specifically to Margie and CHSA's specifications. The hardware department installs the image onto a laptop. Upon completion, the hardware associate updates the completion status in Jira and puts the laptop on the loading dock, attaching a label with Margie's address, serial, etc.	Jira Ticket System	Hardware Prep team
	-19.1.3 The packing list is assigned to a printer in Jira who pulls together the package, places a label sent in from TVA and enters the shipping date into Salesforce. It is waiting pickup from the shipper on the dock.	Jira Ticket System, Label printer, TVA, Salesforce, Shipping scheduler	Warehouse Team & Shipper
Background Technology Product Resources	-19.1.2 Customer service recognizes Margie's number and sends her to an enrollment associate. He confirms her information then looks into Salesforce and notes that the shipment will leave tomorrow. He estimates the typical arrival time and reassures her that her supplies are on the way.	Call Phone system, Salesforce	Enrollments Advisor
	-19.1.1 The customer service agent records the conversation in Salesforce	SalesForce	Enrollments Advisor
Background Technology Product Resources	-19.6. Upon picking up the shipment, the loading dock records the departure date in Jira, Salesforce & TVA.	Jira, Salesforce & TVA	Warehouse Shipping Team
	-19.1.1 Salesforce automatically sends Margie an email informing her of the shipment with instructions on how to log in to the computer.	Salesforce	Enrollments Team
Background Technology Product Resources	-19. The shipper's system communicates with the shipping department about the arrival of the computer. The shipping department batch loads the data into NetSuite which informs Salesforce of the computer's arrival.	Shipper's system, NetSuite & Salesforce	Warehouse Team & Enrollment Team
	-19.8. Margie's login to the computer initiates a call to the Hardware Dept.'s log system that the student has accessed the computer at a specific date and time.	Hardware Logging System	Hardware Team