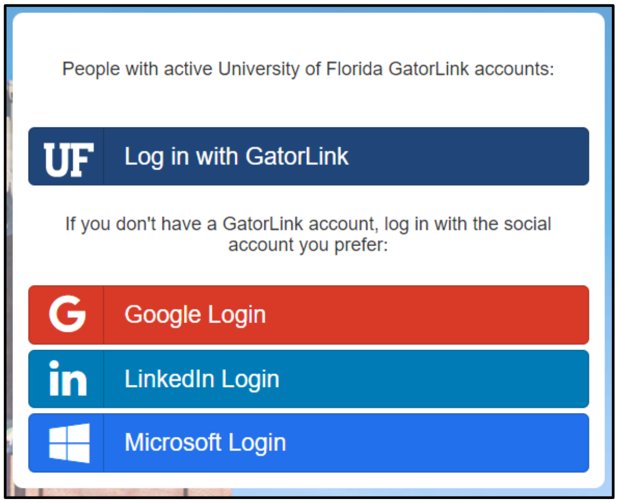
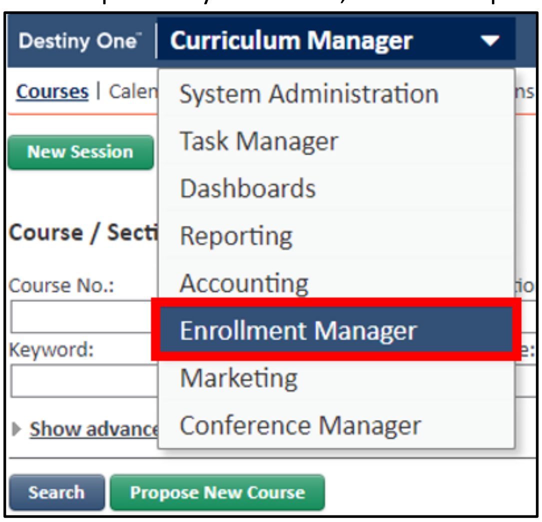
Creating a New Group

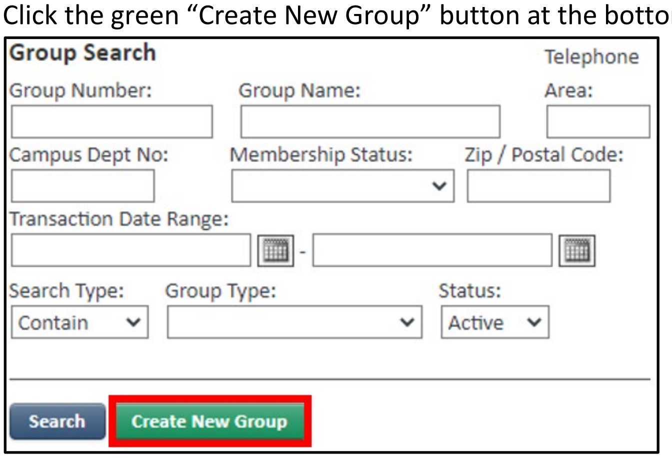
1. Log into Destiny One: uflsv.destinyone.moderncampus.net



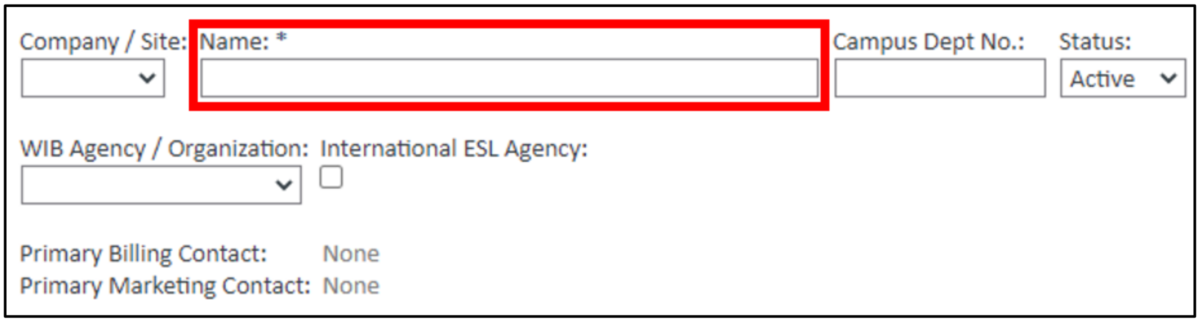
2. At the top left of your screen, use the dropdown menu to switch to the “Enrollment Manager”.



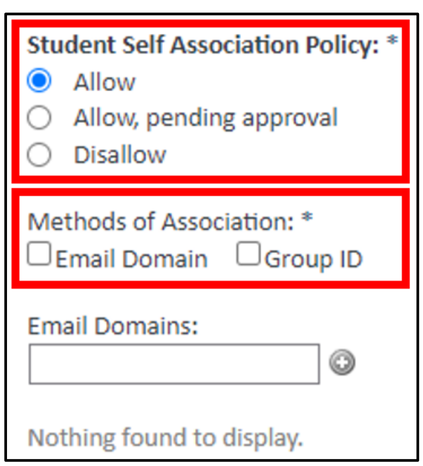
3. Click the green “Create New Group” button at the bottom of the screen.



4. Enter the following required information:
   a. Name: Company/site name.



   b. Student Self Association Policy: Students can associate themselves to groups in the Student View.
      i. In this section, you can select how the student associates himself/herself with the following options:
         1. Allow: Select the radio button for Allow and the Methods of Association opens below it for your further selection. If you select this radio button, you enable a student to associate himself/herself to a group.
         2. Allow, pending approval: Select the radio button for Allow, pending approval and the Methods of Association opens below it for your further selection. If you select this radio button, when student requests association to group, a task generates for the assigned Staff View user to review and approve the association in the Student Group Association Request workflow.
         3. Do not allow: This is the default selection. The students cannot associate themselves to a group.
      ii. Methods of Association:
         1. Email Domain: Add a checkmark to Email Domain and enter the group's email domain in the Email Domain text field and click the add icon. You can add multiple domains. On the Student View if the student's email domain matches any one of the listed group's email domains, the group is presented to the student as an option for self-association. The association is not automatic. **Note:** A table lists every email domain that you add. You can also edit the email domains with the Edit button
         2. Group ID: Add a checkmark to Group ID. On the Student View the user must enter the Group ID to associate with the group.



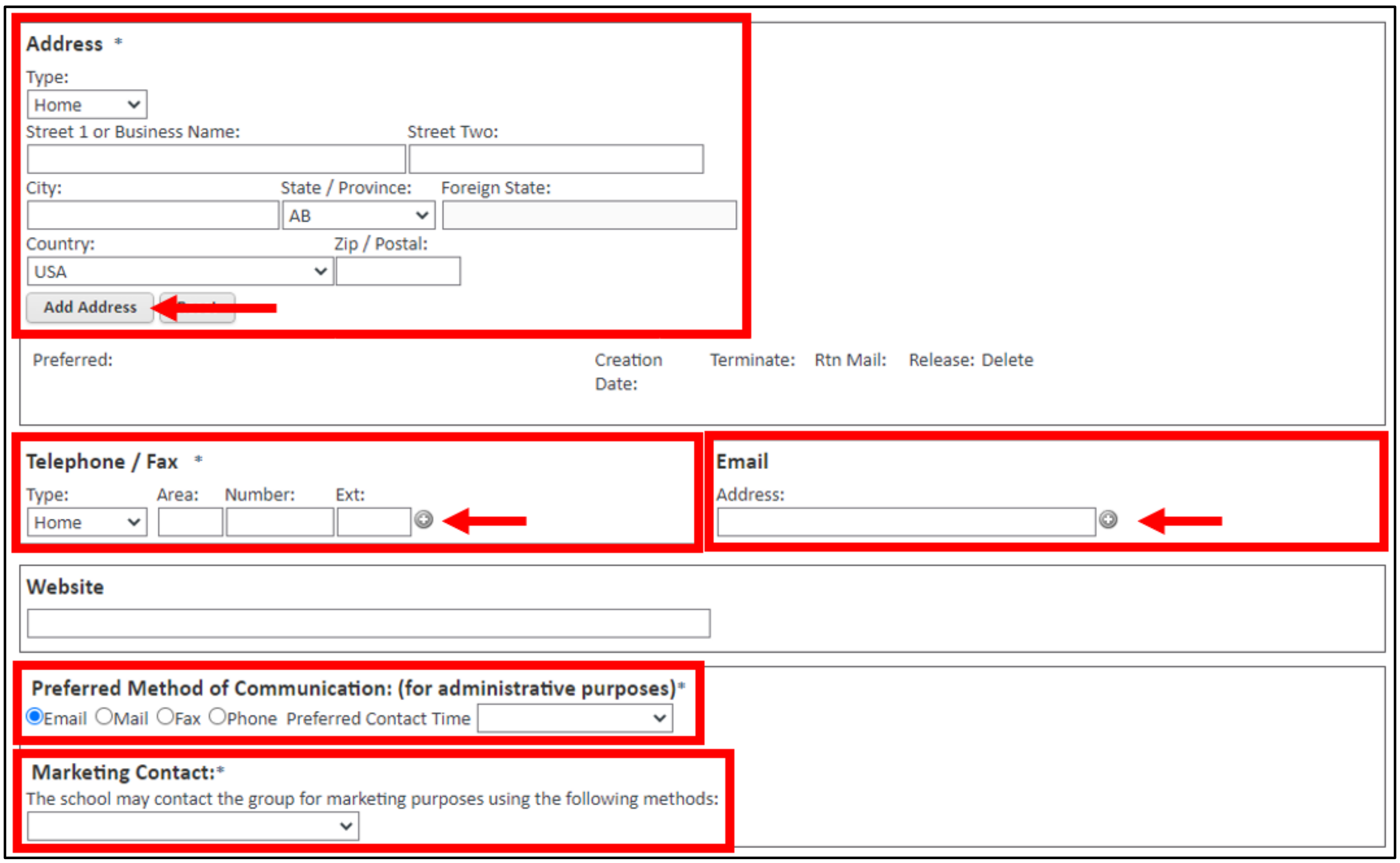
c. Address: Enter all associated address information. At least one address is mandatory. **Note:** You will need to click the “Add Address” button.

d. Telephone/Fax: Enter all associated phone/fax information. At least one phone/fax number is mandatory. **Note:** You will need to click the gray button to add a phone number.

e. Email: Enter all associated email information. At least one email is mandatory. **Note:** You will need to click the gray button to add an email address.

f. Preferred Method of Contact: Select the preferred method of communication. If phone is selected, use the select list to indicate the preferred contact time.

g. Marketing Contact: Select the preferred method for how the school may contact the group for marketing purposes.



5. Enter the following optional features as needed:

   a. Company/Site: Groups can optionally be Companies or Sites, where companies represent the parent organization while sites represent the geographically separate locations of that company. Sites can be associated with companies in a two-level hierarchy. Each company may have multiple sites, but a site can only belong to one company. Field can be left blank if no distinction is provided by group.

   b. Campus Dept No: Campus department number can be entered as needed.

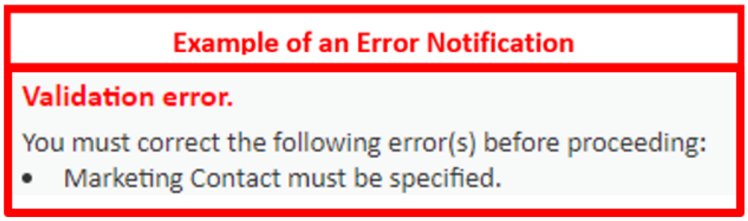
   c. Status: New profiles are set to Active by default. You may choose to amend the status to Inactive if, for example, your school is no longer doing business with the group. Inactive groups are not limited in functionality. For example, inactive groups can be the payor in a group pay transaction.

d. WIB Agency / Organization: WIB is an acronym for Workforce Investment Board or known in some states as Workforce Investment Act Agency. It is essentially a state-sponsored subsidy program to provide those who are unemployed with additional training. When a student enrolls under a WIB or WIA program, the school enrolls them using a Group Profile specifically created for a WIB Agency. They can then bill the cost of the enrollment to the third party WIB agency.
e. Alternative Names: If the group goes by multiple names, use their primary name in the Name field above and enter additional names in the Alternate Names subform. Alternate names do not appear anywhere else in Destiny One.
f. Business License No.: Enter information as needed.
g. Tax Reg No.: Enter information as needed.
h. Account Number: Enter information as needed.
i. Industry: Selects the applicable industry. Available selections will be based on the Industry Preference Table.
j. Total No. of Employees: Enter information as needed.
k. PO Number: This field is a text entry field with no logic. The text in this field is included in the Roll-up Invoice for the company during the Roll-up Invoice Generation.
l. Public View Payment Policy:
    i. Student may invoice group: A student that is a pre-existing member of this group is given the option to invoice (bill) their employer (group) directly rather than paying with a credit card during Public View enrollments. With this option selected, an additional checkbox allows you to indicate if the student must provide their contact or manager's information in the Public View during the checkout process. When the student provides this information, an email is automatically sent to the manager asking him/her to approve or deny paying for the transaction. **Note:** The option to invoice the Group will only be available on the Public View if all items in the student's basket allow group payment.
    ii. Student Pays: The student is not given the option to invoice their employer (group) during Public View enrollments.
m. Group Categories: Enter an applicable category for the group. Available selections will be based on the Group Categories Preference Table.
n. Corporate Admin Portal (CAP): Indicate if the Corporate Admin Portal (CAP) is Enabled or Disabled for the group. When Enabled is selected the Link for the group portal appears.
o. Membership: Schools can sell memberships to companies using special requests. For example, a school can sell annual memberships to a company and in return company employees receive discounts on the school's courses. This section contains details of the membership special request purchased by the group. The Group Profile can hold the details of a single membership. When a group purchases a special request with Fulfillment Details of Membership (as setup on the Special Request page), Destiny One automatically populates most of the fields in the section. Validation prevents a group from purchasing the same membership special request twice. If a group subsequently purchases a different membership special request, Destiny One overwrites the membership information on the profile with the new membership information.
p. Website: Enter the group's website address. The value is for informational purposes and doesn't appear elsewhere in Destiny One. Maximum 255 characters and must have in a valid website format.

q. Profile Holds: If needed, chose the applicable Hold to apply to the group's profile. Available selections will be based on the Active Hold Reasons set up in the System Admin > Enrollment Rules > Hold Reasons. Multiple holds can be added but only one of each hold reason can be added to the same group profile.

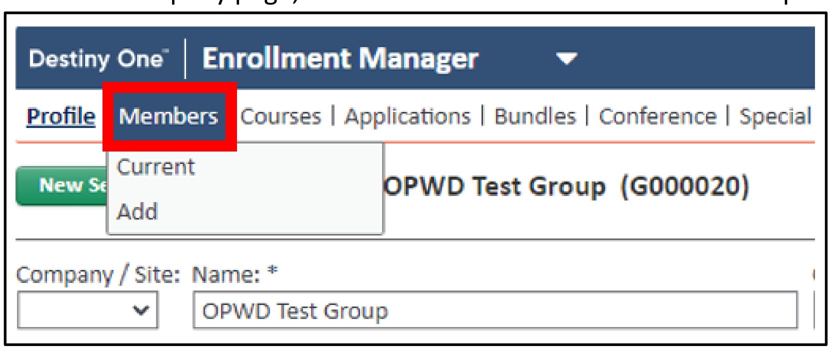
r. Comments: Comments can be made to communicate internal information about the Group.

6. At the bottom of the page, click the Navy "Save" button.

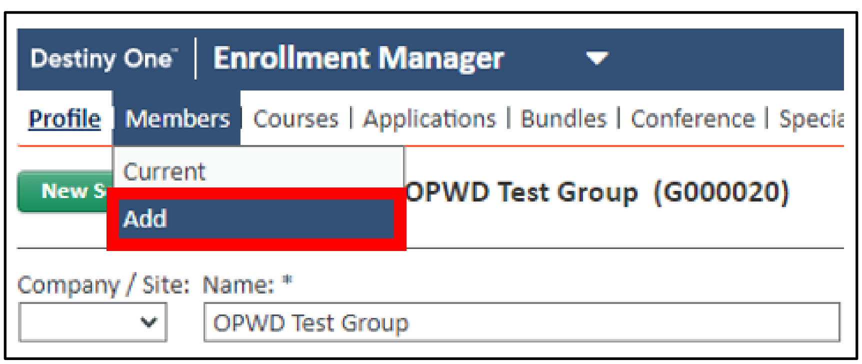


<u>Assigning a Student to a Group:</u>

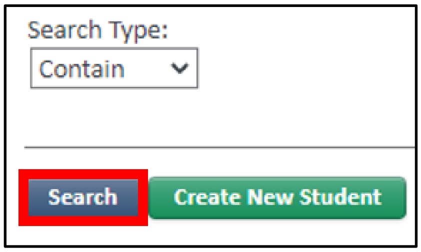
1. From the company page, hover over the "Members" tab at the top.



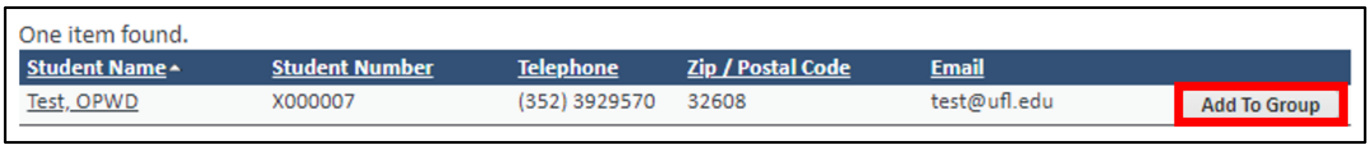
2. Click "Add".



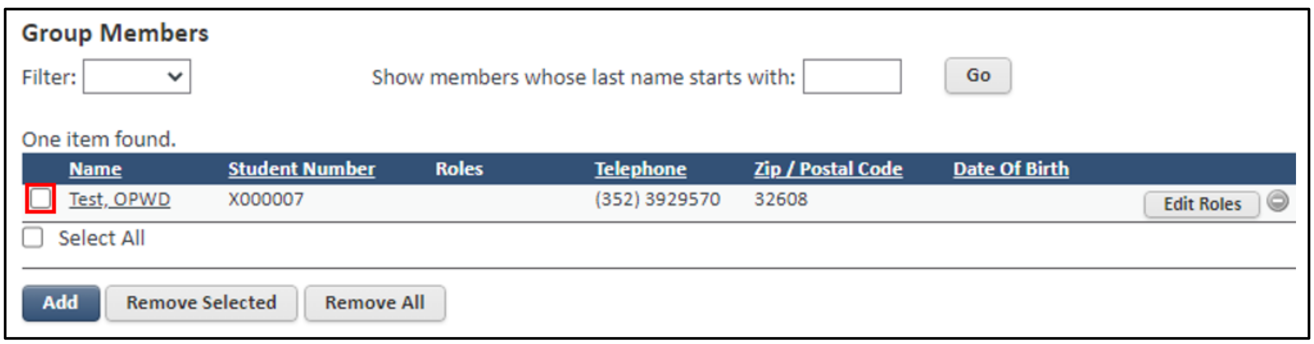
3. Enter the member's information into the search and click the navy "Search" button at the bottom. **Note:** The member will need to be in system prior to attempting to be added to the group.



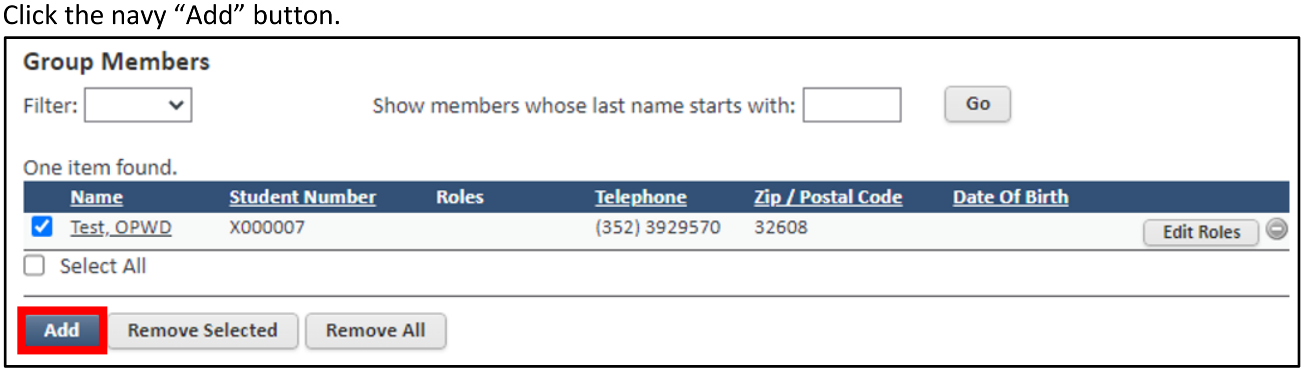
4. Select the gray "Add To Group" button to the right of the desired student's name.



5. Select the checkbox next to the student's name.

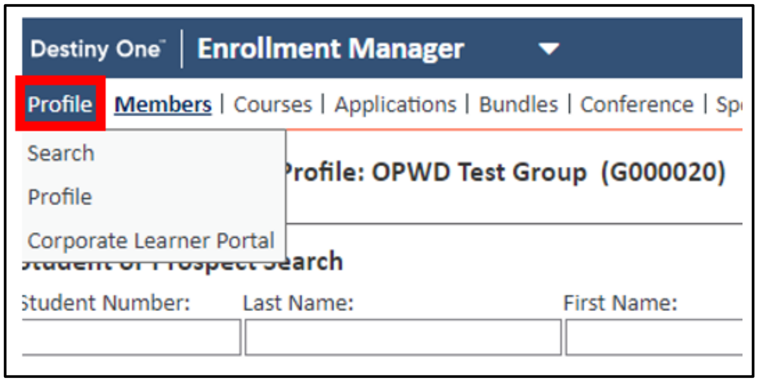


6. Click the navy "Add" button.

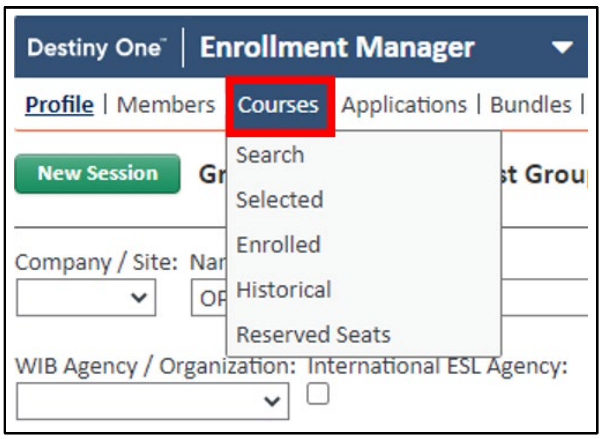


Registering, Invoicing Students for a Course Under a Group, & Adding Payments

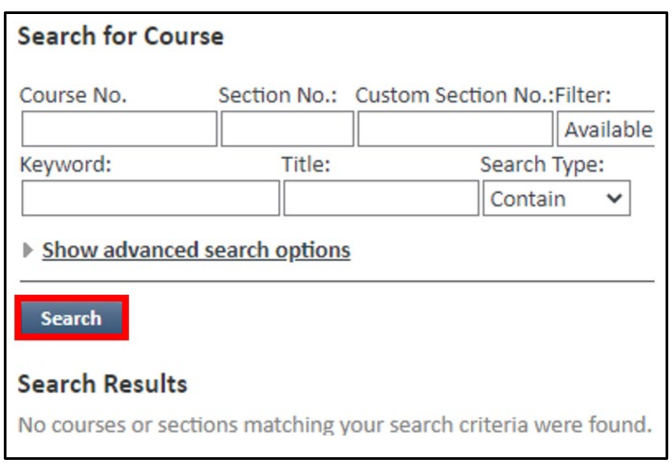
1. Confirm that you are under the correct group by selecting the "Profile" tab to return to the Group Profile. If you do not have the proper group select, search for the group and select it. **Note:** If you want to register a student and invoice their group, you will need to have the group selected prior to registration and invoicing. If the student is selected, then the course and invoicing options will only appear under the Student Profile.



2. From the Group Profile, click the "Courses" tab.

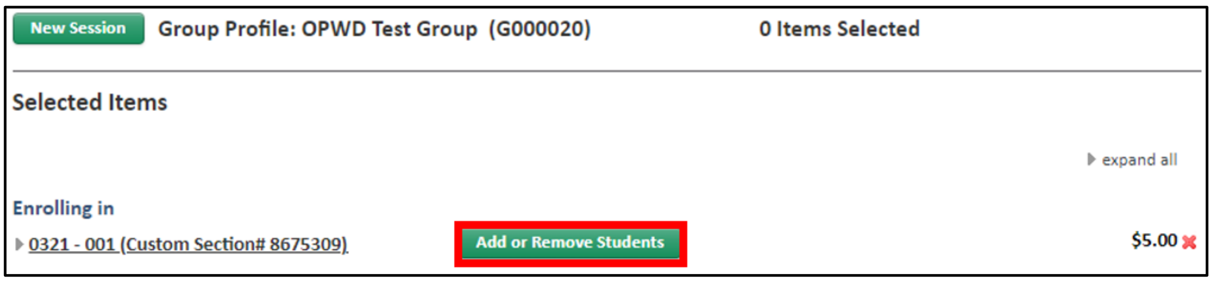


3. Enter the course information into the search and click the navy "Search" button at the bottom.



4. Click the navy “Register” button on the far-right side of the course you want to register students in.

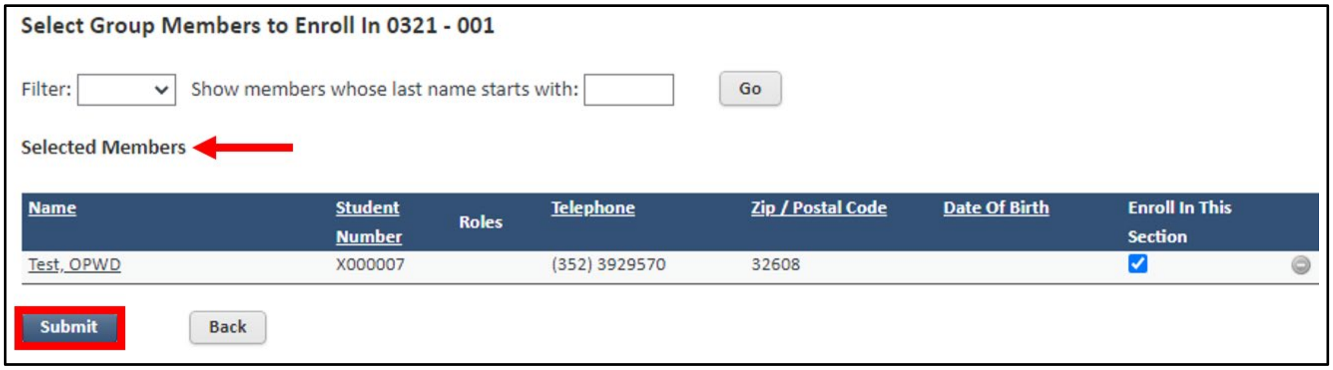
5. Click the green “Add or Remove Students” button.



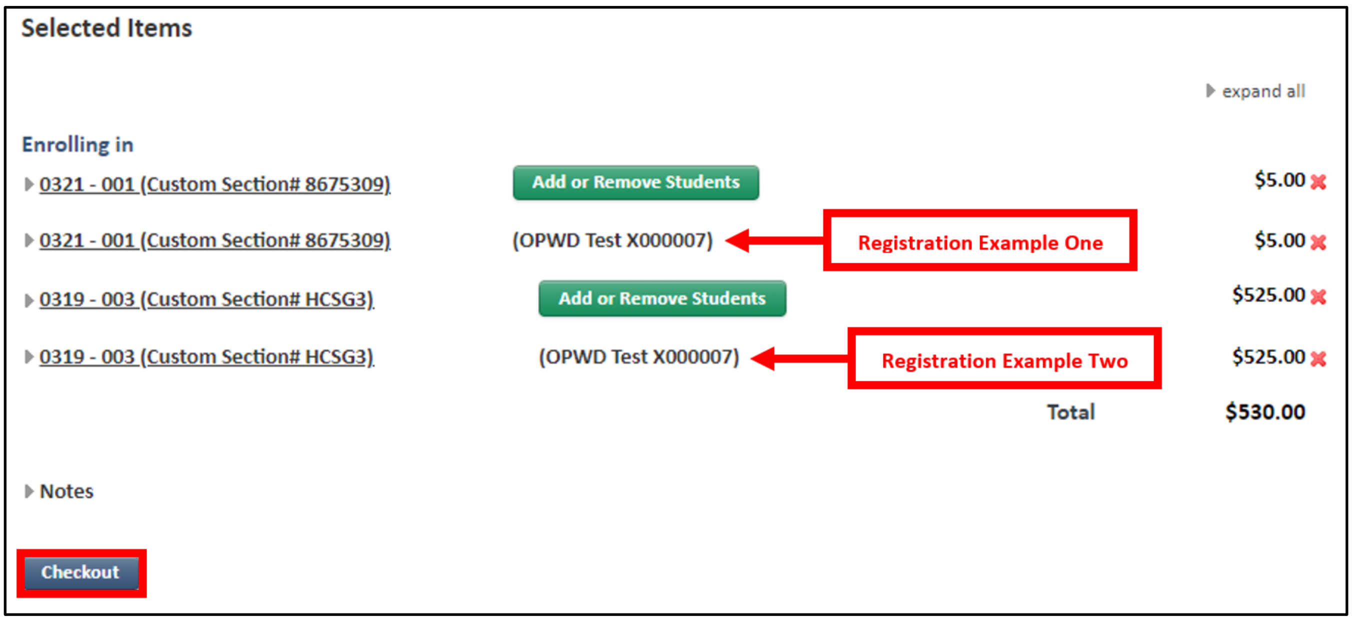
6. Select the checkbox associated with the student’s name under the “Enroll In This Section” on the far-right side.

7. Click the “Add” button.

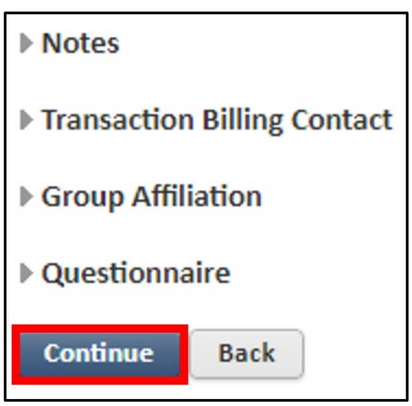
8. Under the "Selected Members" section, the student you added will appear with the "Enroll in this Section" box selected. Select the navy "Submit" button. Repeat Steps 2-8 for each student and/or course.



9. When all students have been registered, select the navy "Checkout" button.



10. Review the information and then click the navy "Continue" button.



<u>Below are Instructions on How to Make Various Payments:</u>

<u>Invoice:</u> Step 11

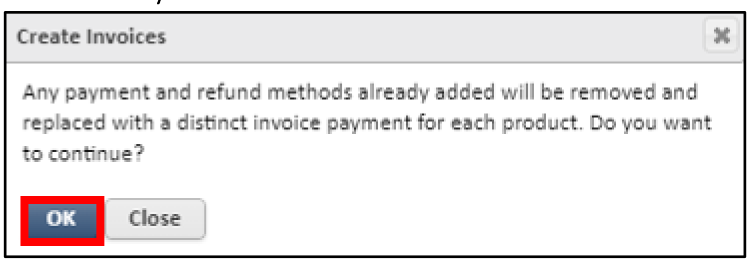
<u>Check:</u> Step 12

<u>Credit Card:</u> Step 13

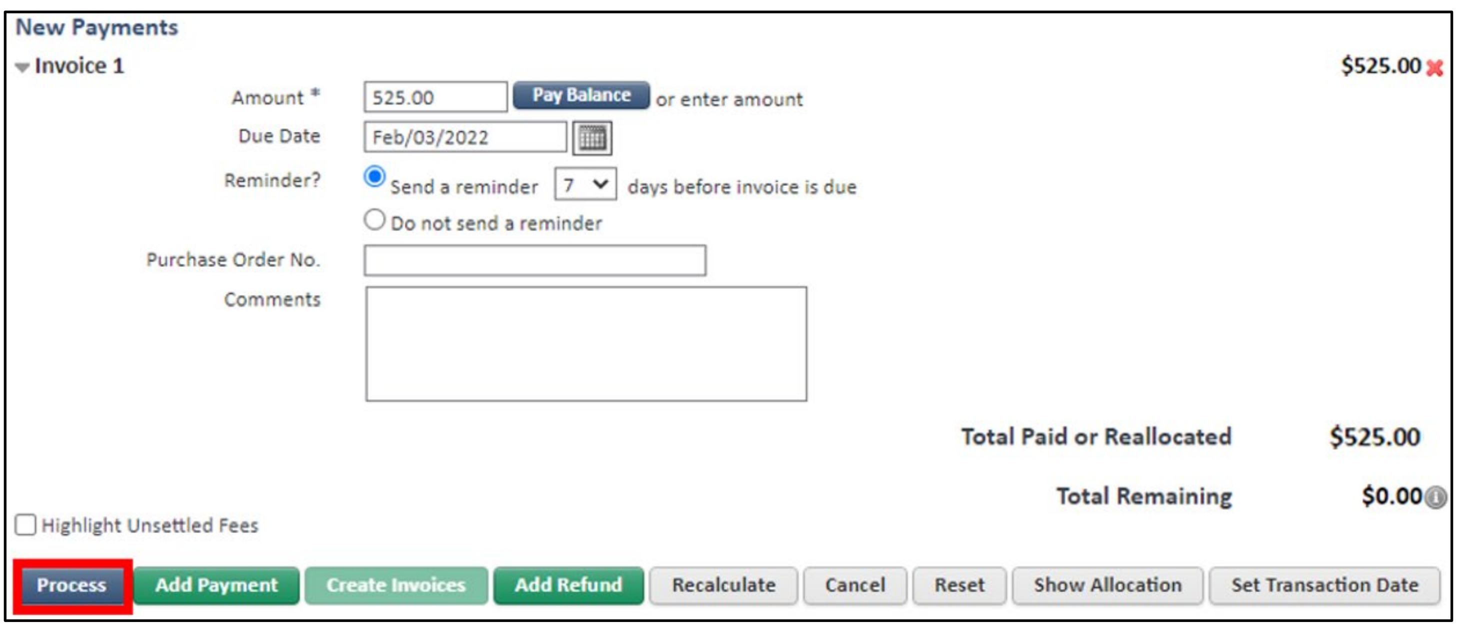
<u>Bank Wire/Journal Entry:</u> Step 14

11. **<u>To Generate an Invoice:</u>**
    a. Scroll down and click green "Create Invoices" button. **<u>Note:</u>** If the "Create Invoices" does not work, you can use the "Add Payment" button and select the "Invoice" option.

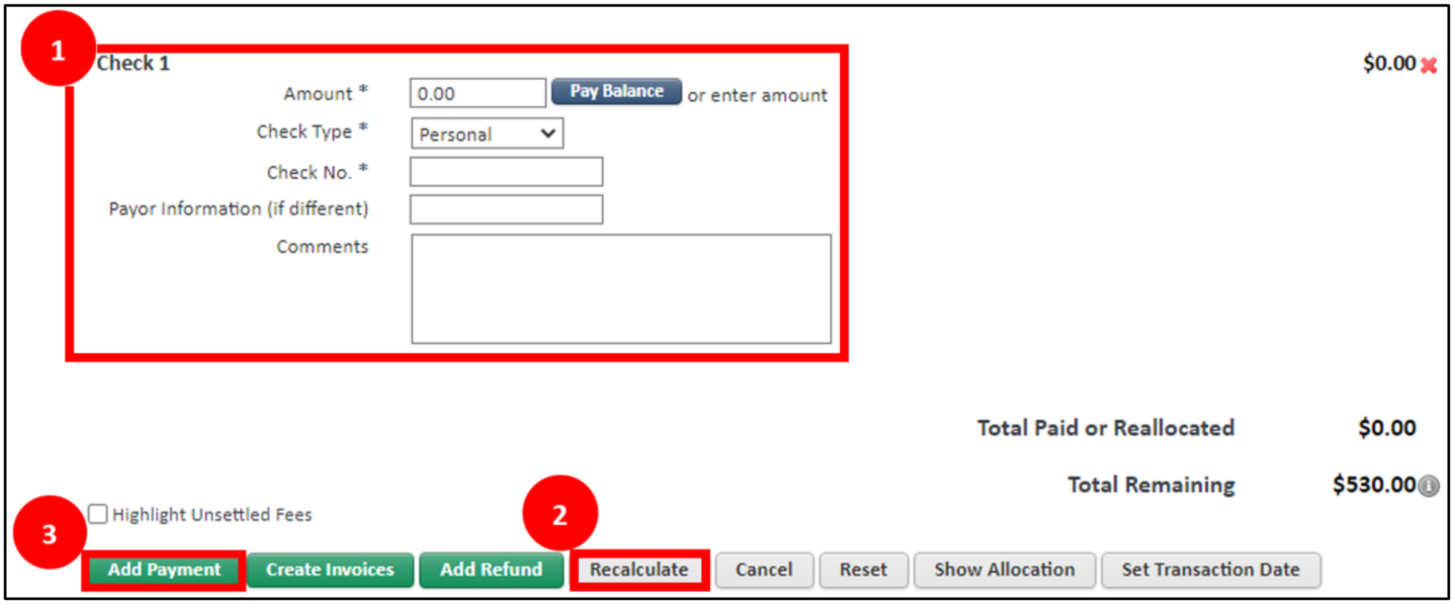
    b. Click the navy "OK" button.



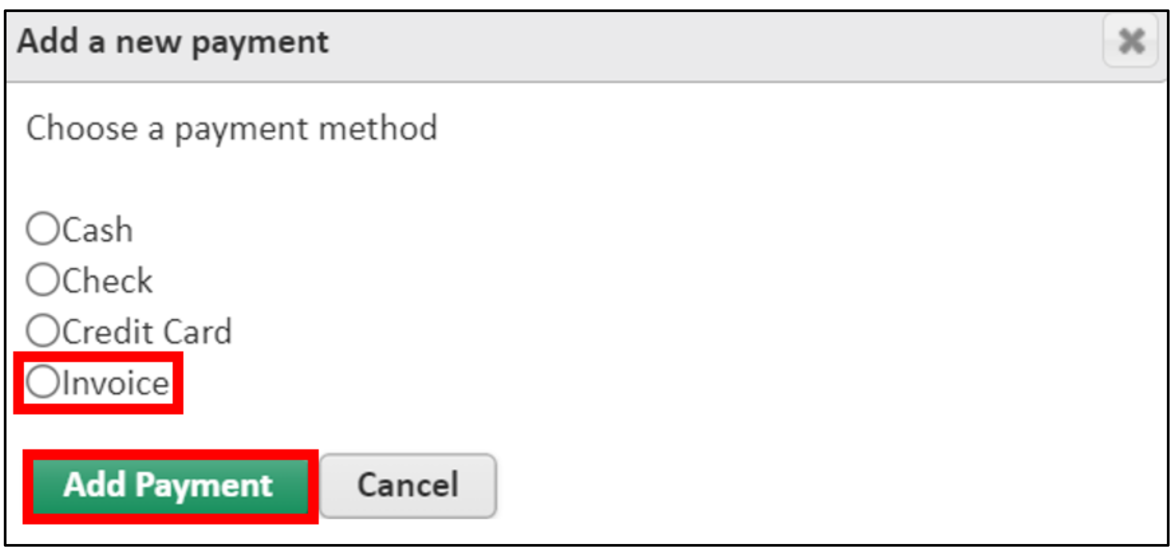
    c. The invoice(s) will be generated and reflected on the screen. Adjust the reminder setting and add a Purchase Order Number and comments as needed. Select the navy "Process" button at the bottom of the screen.



12. **<u>For a Check Payment:</u>**
    a. <u>For a Partial Payment:</u>
        i. Enter the check information and amount.
        ii. Click the "Recalculate" button.
        iii. Click the "Add Payment" button.

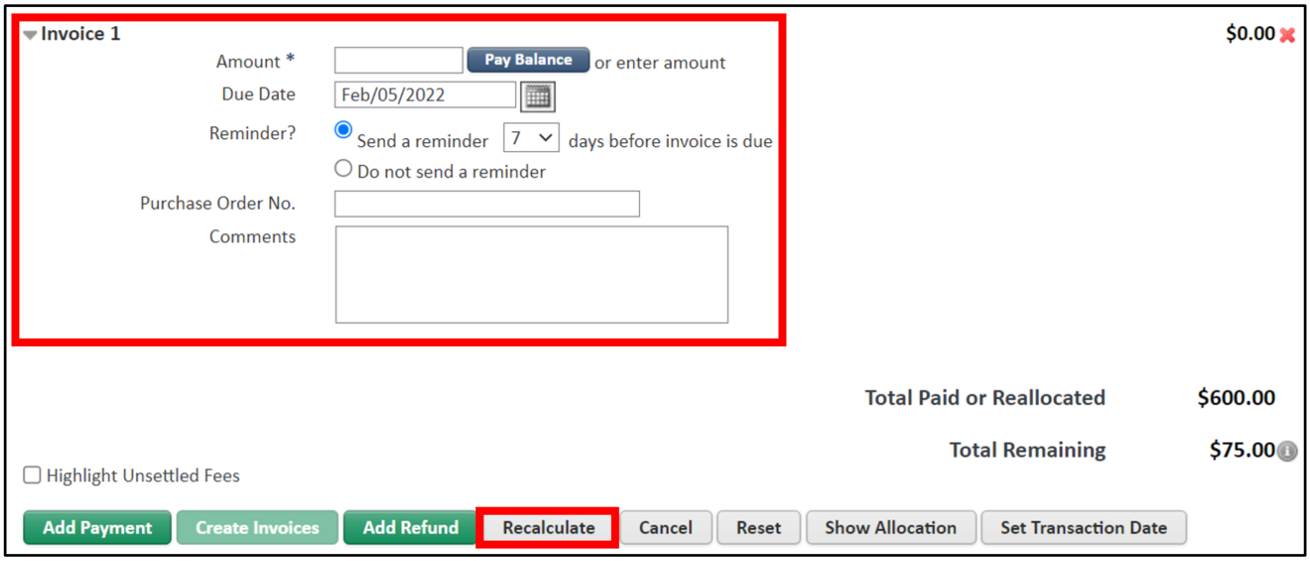


        iv. Select the "Invoice" option.
        v. Click "Add Payment" button.



vi. Enter the remaining balance into the "Invoice 1" amount box. Adjust due date and reminder as needed.

vii. Click the "Recalculate" button.



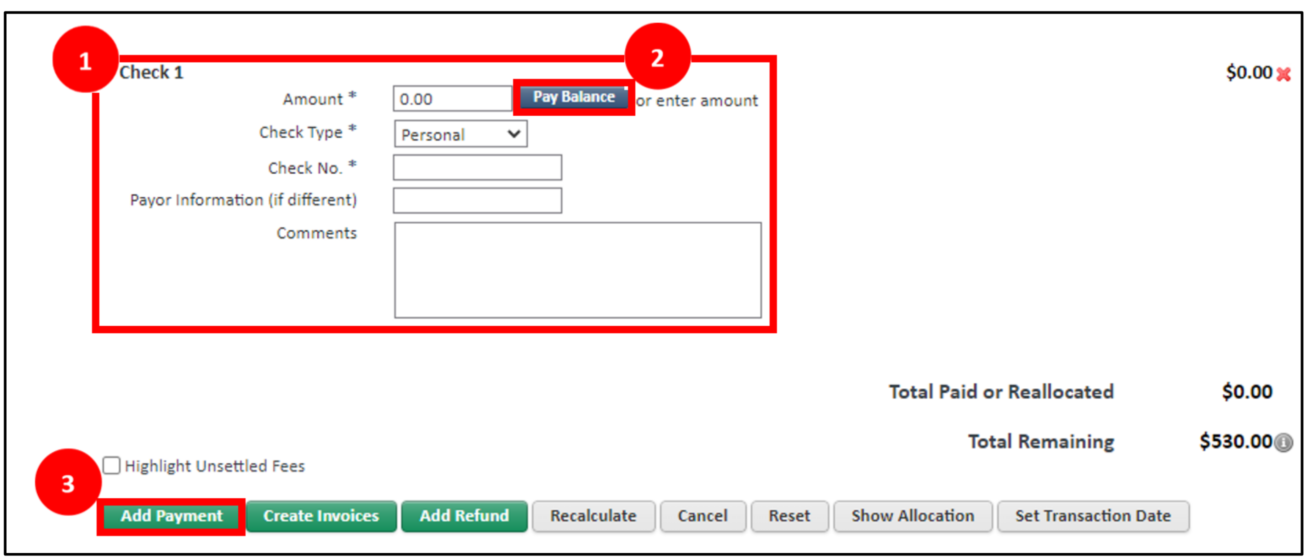
viii. Click the "Process" button. **Note:** The "Process" button only appears when the "Total Remaining" is $0.00.

b. For a Full Payment:

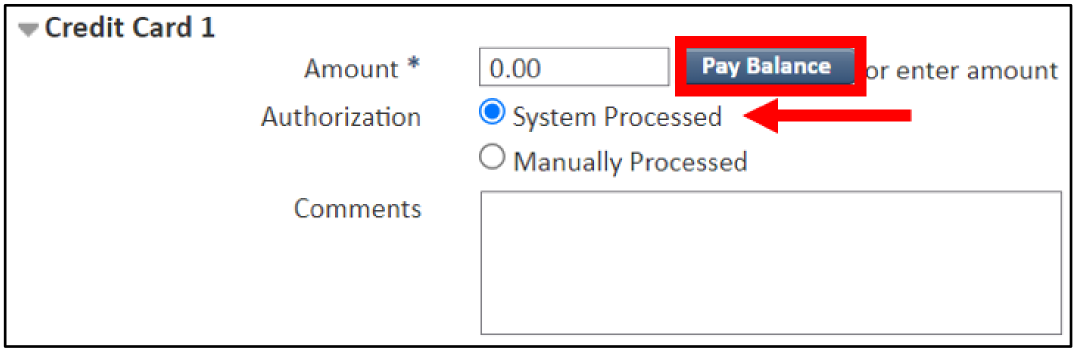
i. Enter the check information and amount.

ii. Click the "Pay Balance" button.

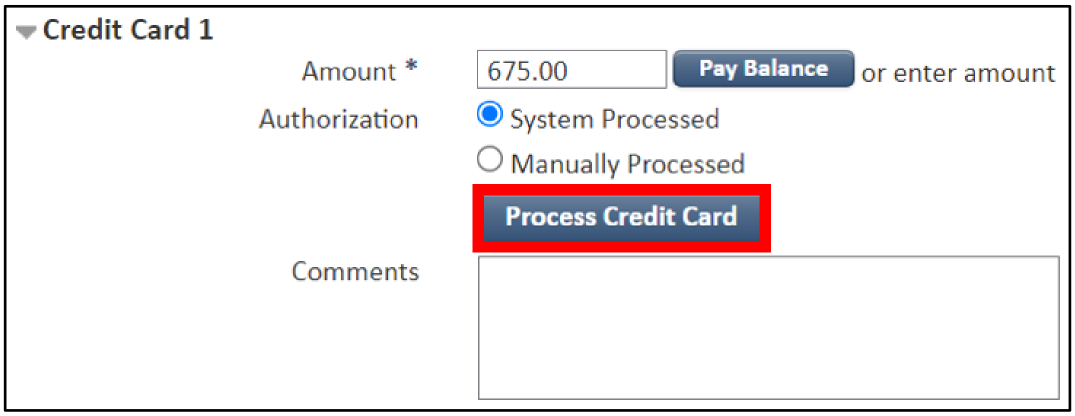
iii. Click the "Process" button.



13. **<u>For a Credit Card Payment:</u>** **<u>Note:</u>** For partial payments follow steps 12-a-ii through 12-a-viii.
    a. Ensure the "System Processed" option is selected.
    b. Click the "Pay Balance" button.

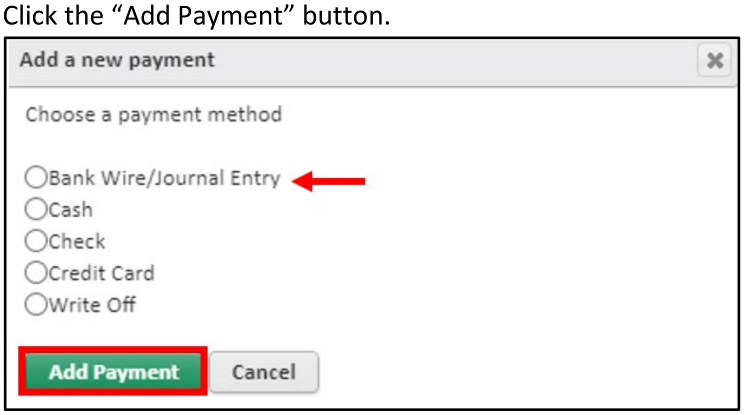


    c. Click the "Process Credit Card" button.

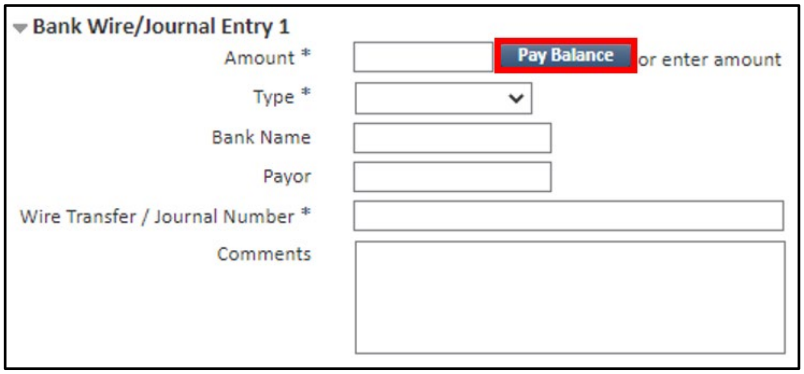


14. **<u>For a Bank Wire/Journal Entry:</u>** **<u>Note:</u>** For partial payments follow steps 12-a-ii through 12-a-viii.
    a. Click the "Add Payment" button.

    b. Select the "Bank Wire/Journal Entry" option.
    c. Click the "Add Payment" button.

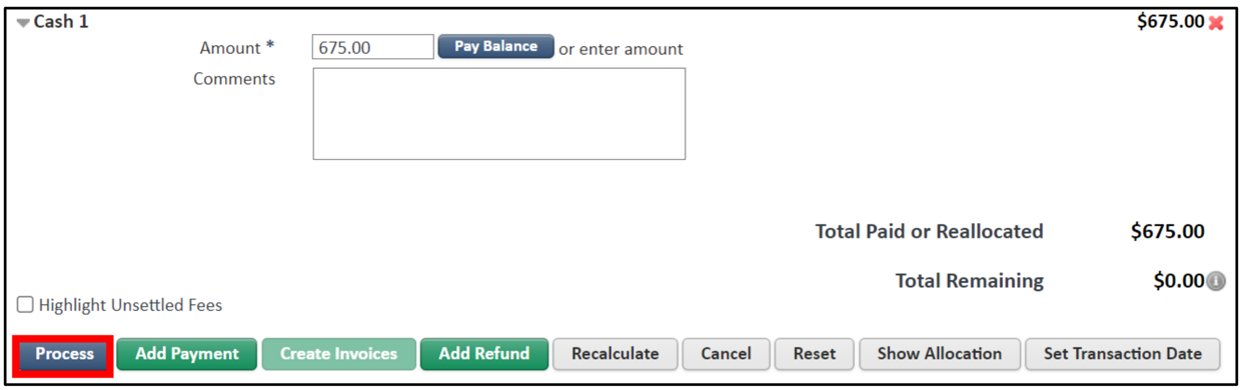


d. Click the "Pay Balance" button.

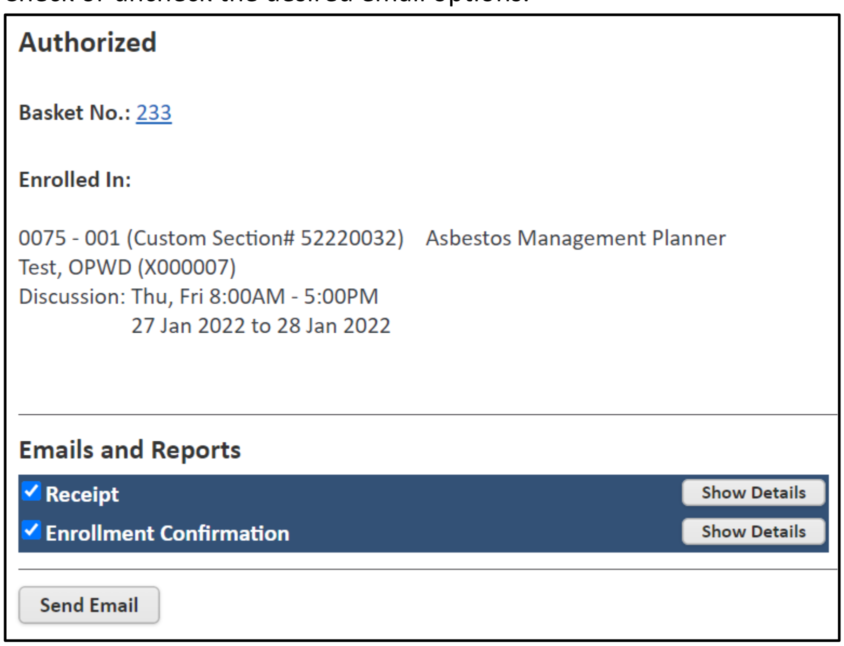


e. Enter the needed payment info.

f. Click the "Process" button.



15. Once the payment/invoice is processed and the registration is committed, the "Authorized" page will appear. Check or uncheck the desired email options.



16. Click the "Send Email" button to send a copy of the receipt/invoice and enrollment confirmation to the email address on file.