

Modern Admissions and Records Process: Step-by-Step Checklist

Use this checklist to modernize your admissions and records processes.
Check off each task as you complete it.

1. Map Your Admissions Stages Clearly

- ☐ List every admissions step (inquiry, application, interview, decision, enrollment).
 - ☐ Assign staff responsibilities for each stage.
 - ☐ Standardize forms and email templates.
 - ☐ Set internal deadlines to keep the process moving.
 - ☐ Visualize your pipeline in a Kanban board or workflow management tool.
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2. Define Your Record-Keeping Categories and Policies

- ☐ Categorize records: personal info, guardian data, academic history, health, compliance docs.
- ☐ Define required fields and data retention policies.
- ☐ Set access permissions based on staff roles.
- ☐ Document your data storage and backup policies.

3. Centralize All Data in One Location

- ☐ Choose a secure, compliant cloud platform.
 - ☐ Migrate historical data from paper or spreadsheets.
 - ☐ Organize folders or database fields by year and cohort.
 - ☐ Link admissions documents directly to student records.
 - ☐ Ensure version control and audit logs.
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4. Empower Staff with Clear Processes and Permissions

- ☐ Develop a process manual for staff training.
 - ☐ Assign user roles within your SIS or file storage.
 - ☐ Schedule regular training sessions on admissions best practices.
 - ☐ Establish escalation paths for admissions issues.
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5. Regularly Audit Records for Completeness and Compliance

- ☐ Conduct quarterly reviews of student files.
- ☐ Identify and fill missing mandatory information.
- ☐ Monitor access logs for unauthorized views.
- ☐ Run annual compliance checks.
- ☐ Update workflows based on evolving school needs.