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GETTING STARTED

HOW DOES SOMEONE IN MY ORGANIZATION REGISTER TO USE CALYNX?

You or the new registrant may contact datasupport@collegefutures.org with the new registrant's:

1. Name
2. Email address
3. Phone number and
4. Reason for requesting access.

The requester will receive registration instructions by email. The registration email is unique to the email address to which it is sent and should not be shared.

Please add datasupport@collegefutures.org to the requester's address book to ensure the registration link does not get treated as junk mail/spam.

THE CALYNX HOMEPAGE

ANNOUNCEMENTS AND FEATURED CONTENT

Once you are logged-in to CALynx, the **Homepage** will be an ongoing source for important announcements and featured, relevant content.

CALYNX MAIN MENU

STUDENTS/[AND ENROLLMENT]

1. Add/update student-level data for the current academic year
2. Add/update post-secondary enrollment details for students you are already tracking.
3. Add information or upload documents verifying post-secondary enrollment details.

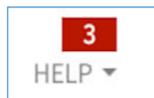
When it's time to enter your data, visit the [applicable section below](#) for more details.

REPORTS

1. Access various reports/dashboards/analytical tools that provide insight into your data and aid in the completion of its entry.

HELP/CALYNX SUPPORT

View **Frequently Asked Questions (FAQs)** or view/download this **User Guide** as a “print-friendly” PDF document.

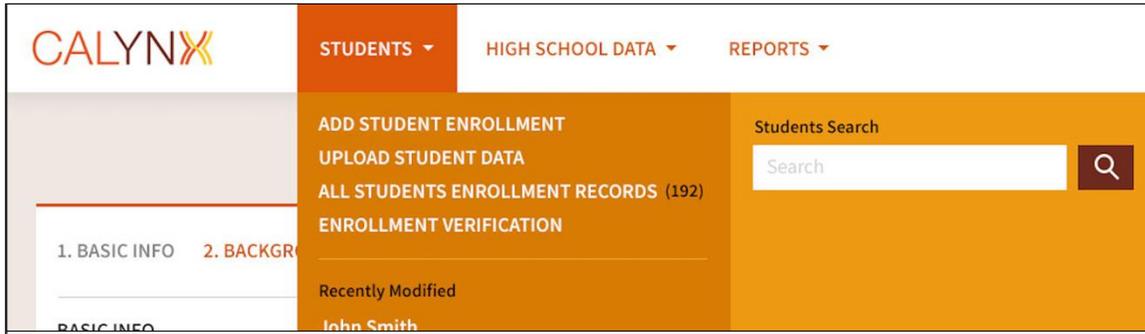


Select **Help Requests** to submit any support related requests or concerns. Then watch for a number to appear in the navigation, typically within one business day, indicating that unread replies are waiting.

USER PROFILE

Selecting your username provides access to any editable portions of your user profile, including the ability to change your password, and allows you to logout of CALynx.

STUDENTS/ENROLLMENTS



Add Student/Enrollment – Allows the addition of a new student/enrollment for the current academic year.

Upload Student Data – Save time and avoid the need to enter each student individually by uploading a spreadsheet containing data for multiple students/enrollments. [Please notify Data Support if you wish to use this option by sending an email to datasupport@collegefutures.org.]

All Students Enrollment Records – View all student/enrollment data entered to-date by your organization. From this list you can

- Update current academic-year student/enrollment data
- Add enrollment data to prior years' students by creating a current academic-year record and adding current academic-year enrollment details.

Enrollment Verification – View all enrollment records of your students that matched with the National Student Clearinghouse and/or enter enrollment information yourself to verify a student's post-secondary enrollment.

ADDING NEW STUDENTS/ENROLLMENTS TO CALYNX

There are **two ways** that students/enrollments can be added to CALynx:

OPTION 1: ADD STUDENTS/ENROLLMENTS USING WEB FORMS - BY ENTERING IN EACH STUDENT'S BASIC, BACKGROUND, AND EDUCATION INFORMATION USING THE ADD STUDENT/ENROLLMENT SCREENS.

OR

OPTION 2 - ADD STUDENTS/ENROLLMENTS BY UPLOADING A SPREADSHEET CONTAINING MULTIPLE STUDENT/ENROLLMENT RECORDS USING THE UPLOAD STUDENT/ENROLLMENT DATA FEATURE.

A combination of these two methods might also be used. For example, students might be initially added via **“Upload”** and then updated with enrollment information, individually, via the **Add Student/Enrollment** screens.

OPTION 1: ADD STUDENTS/ENROLLMENTS USING WEB FORMS

For each student/enrollment you will enter three types of information:

1. **Basic Info** (the required fields to initially create a new student/enrollment record).
2. **Background** which includes demographic information.
3. **Education** which includes post-secondary enrollment(s) details and verification thereof.

BASIC INFO [REQUIRED FIELDS]

The following is true of any new student record:

- The fields required to create the record:
 1. First name
 2. Last name
 3. Date of Birth
 4. High School County
 5. High School District
 6. Program (automatically added)
 7. Academic Year (automatically added)
- For a new student/enrollment record to be added, the record must contain data for all and unique data for at least one of the seven required fields.

STUDENT BACKGROUND INFORMATION

All fields are required unless otherwise specified with your program officer. If form options do not appear adequate to accurately report your data, please contact datasupport@collegefutures.org.

Note: Selection of “Asian” always requires the selection of an Asian or Pacific Islander Sub-Group.

STUDENT EDUCATION INFORMATION [POSTSECONDARY ENROLLMENT(S)]

Education details can be added for the current academic year only, unless a previous year has been specifically reopened for additional data entry, by request.

Add postsecondary enrollment details by first selecting **Add Postsecondary Institution**. Postsecondary institution/enrollment information can be added when the student/enrollment record is initially created or later. See [All Students Enrollments Records](#).

HOW DO I REPORT SEVERAL PSIS IF MY STUDENT IS CONCURRENTLY ENROLLED?

If your student is concurrently enrolled, please add all Postsecondary Institutions where the student is concurrently enrolled. Please select the student’s primary institution by selecting **Primary Institution**.

PREVIOUSLY ENTERED STUDENTS

Based on the minimum, required fields, in the “Basic Info” section, CALynx will determine if you or any other program has already added the student to CALynx, the student was added during a previous academic year, or the student was added during the current academic year.

STUDENTS ENTERED DURING A PREVIOUS ACADEMIC YEAR

You do not have to enter their “Basic Info” or “Background” data again this year. Just navigate to [All Students Enrollment Records](#) to add a new enrollment record for the current academic year for any student whom your organization has already entered.

2011-2012	Amanda	Abarca	12-08-19
 View			
2014-2015	Amanda	Abarca	12-08-19

STUDENTS SHARED WITH OTHER PROGRAMS

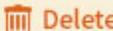
If you receive a notification that your student already exists in the system and works with other programs, this means that another program has already entered your student into CALynx. Included in the notification will be information on the program(s) and data contact(s) that work with the student.

Each program has access to edit all student/enrollment record data entered by any other program that shares a student except the financial aid information entered by other grantees. You may view this information by clicking the link in the notification box.

You may want to keep a record of other programs’ information in case there is a need to coordinate between your organizations. For example, there could be conflicting data about the student that needs further clarification by consulting the other organization. You may access this information again by clicking the link in the notification box.

ALL STUDENTS ENROLLMENT RECORDS

All Students Enrollment Records is a list of all students with their corresponding academic year(s) data. By default, this list displays the current year student/enrollment records.

2015-2016	Diego	Abad
 Edit		
2015-2016	Sina	Abadina

By unselecting the checkbox on the top of the screen, all academic years will be included. Past years’ information can be viewed but cannot be edited.

ADDING CURRENT-YEAR ENROLLMENT FOR A STUDENT ADDED IN A PREVIOUS ACADEMIC YEAR

Find your student’s record from a previous year using **All Students Enrollment Records** and choose the option to create an enrollment record for the current year.

2011-2012	Amanda	Abarca	12-08-19
 View			
2014-2015	Amanda	Abarca	12-08-19

ENROLLMENT VERIFICATION

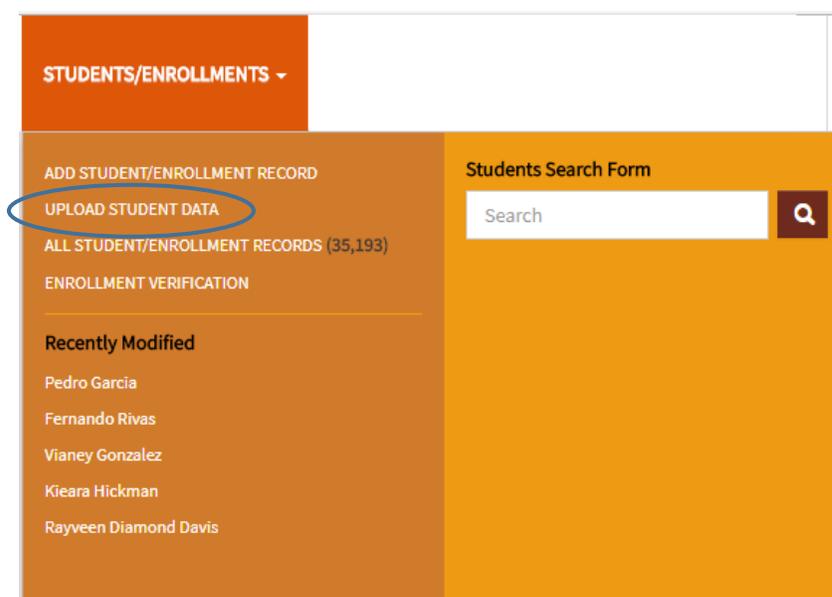
Once a post-secondary enrollment/institution has been added, you'll need to add enrollment verification. Navigate to the **Enrollment Verification** screen. The list initially displayed includes all students with current academic year enrollments for whom no verification has been entered.

Uncheck the checkbox at the top of the screen to see similar enrollments for which verification has been added as well.

Most enrollments will be verified by College Futures Foundation by matching the students with National Student Clearinghouse post-secondary enrollment data. However, for those students/enrollments that are not or cannot be verified in this manner, manual verification is necessary. This is completed by uploading documentation that verifies the student's enrollment.

OPTION 2: UPLOAD STUDENT DATA

1. Select "Upload Student Data" from the Students/Enrollments drop-down menu



2. Download your Student/Enrollment Data Upload template. Please review all the sheets in the workbook before entering in your data.

DATA UPLOAD

Student/Enrollment Data Upload

Step 1: Review the [Data Upload](#) section of the [CALynx User Guide](#)

Step 2: Download your [Student/Enrollment Data Upload Template](#)

Step 3: Add current-year enrollment data for previously entered students as well as all information currently available for new students.

Step 4: Upload data

No file chosen

3. Once you have uploaded your data, you can review the log which shows which records were successfully uploaded into CALynx, and which require your attention before uploading. You can also look at the Previous Uploaded Logs to either download the previous files you have uploaded or review the log reports from previous uploads.

Previous Upload Logs

Your Organization Name	10_18_2017_15_31_32_usr_353_1508373117.xlsx Log
	10_18_2017_13_40_24_usr_353_1508367343.xlsx Log
	10_13_2017_14_41_44_usr_353_1507931257.xlsx Log
	10_18_2017_15_35_40_usr_353_1508373315.xlsx Log
	10_13_2017_14_48_37_usr_353_1507931710.xlsx Log

SELECT LOG

STUDENT/ENROLLMENT FAQ

HOW DO I ERASE OR DELETE A STUDENT FROM CALYNX?

To erase a student's information from our database, you will need to submit a help request.

HOW DO I ADD/UPDATE STUDENT/ENROLLMENT DATA FOR A PRIOR ACADEMIC YEAR?

Grantees are only able to add or edit student/enrollment data for the current academic year. If you need to edit data from prior years, you can submit a help request or email datasupport@collegefutures.org.

FINISHED ENTERING CURRENT YEAR DATA?

Congratulations! Now that your data has been entered, simply email Lauren Salazar at lsalazar@collegefutures.org to let us know that you are complete for the current academic year.