

ROI Report: Fields Needed From Your SIS

What to pull and send so we can build the same Inquiries, Applications, and Enrollments report

Before You Pull the Reports

- **School years:** Select all school years from the start of your relationship with Tassel through the current year, and keep every year going forward included. This lets us track trends across the full engagement rather than a single snapshot.
- **Save your report template:** Each of these reports can be saved as a template in your SIS, including the columns you choose and the order they appear in. Save it once so the same layout regenerates every time.
- **Save your year selection:** The selected school years can also be saved with the template, so you don't need to re-select them on each run.

1. Inquiries Report

These FACTS fields are standard for every school. The tour fields (highlighted) are the exception; they may differ by school.

Field Name	Notes
Student	Standard FACTS field. Generic across all school SIS setups. Last, First format with total count.
Status	Standard FACTS field. Generic across all school SIS setups.
Grade	Standard FACTS field. Generic across all school SIS setups.
School Year	Standard FACTS field. Generic across all school SIS setups.
School	Standard FACTS field. Generic across all school SIS setups.
Inquiry Date	Standard FACTS field. Generic across all school SIS setups.
Parent 1 First Name	Standard FACTS field. Generic across all school SIS setups.
Parent 1 Last Name	Standard FACTS field. Generic across all school SIS setups.
Parent 1 Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Parent 1 Email	Standard FACTS field. Generic across all school SIS setups.
Parent 2 First Name	Standard FACTS field. Generic across all school SIS setups.
Parent 2 Last Name	Standard FACTS field. Generic across all school SIS setups.
Parent 2 Email	Standard FACTS field. Generic across all school SIS setups.
Parent 2 Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Campus Visit Date	Tour indicator. Shared FACTS field present in most setups, so include it.
Set Up Tour	Tour indicator. Yes/No-style field showing a tour was scheduled.

Important: tour fields vary by school. “Campus Visit Date” and “Set Up Tour” are the tour fields in this template, but your school may track tours differently. Please include **every field that indicates an inquiry toured**: scheduled tour dates, completed-visit flags, tour status fields, and any **checklist items** (e.g., a “Campus Tour” checklist step) that record a tour took place. When in doubt, include the field; we would rather have an extra tour-related column than miss one.

2. Applications Report

All standard FACTS fields, generic across school SIS setups.

Field Name	Notes
Student	Standard FACTS field. Generic across all school SIS setups. Last, First format with total count.
Grade	Standard FACTS field. Generic across all school SIS setups.
Status	Standard FACTS field. Generic across all school SIS setups.
School Year	Standard FACTS field. Generic across all school SIS setups.
School	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Email	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) Email	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) First Name	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Last Name	Standard FACTS field. Generic across all school SIS setups.

3. Enrollments Report

All standard FACTS fields, generic across school SIS setups.

Field Name	Notes
Student	Standard FACTS field. Generic across all school SIS setups. Last, First format with total count.
Grade	Standard FACTS field. Generic across all school SIS setups.
School	Standard FACTS field. Generic across all school SIS setups.
Status	Standard FACTS field. Generic across all school SIS setups.
Submit Date	Standard FACTS field. Generic across all school SIS setups.
Packet Name	Standard FACTS field. Generic across all school SIS setups.
School Year	Standard FACTS field. Generic across all school SIS setups.

Field Name	Notes
Enrollment ID	Standard FACTS field. Generic across all school SIS setups.
Packet Type	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) First Name	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Last Name	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Email	Standard FACTS field. Generic across all school SIS setups.
Parent 1 (House 1) Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) First Name	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) Last Name	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) Email	Standard FACTS field. Generic across all school SIS setups.
Parent 2 (House 1) Cell Phone	Standard FACTS field. Generic across all school SIS setups.
Enrollment Type	Standard FACTS field. Generic across all school SIS setups. New vs. Returning.