



# **SchoolMint** Enroll **3.0**

Target Date: August 26, 2025



# Enroll 3.0 Features

- Common App
- Autofill fields
- Accessibility Updates
- New Seeder Site for Single Site Orgs
- Nested Filters in Reports/ Dynamic Views



Feature Highlight

# Common App



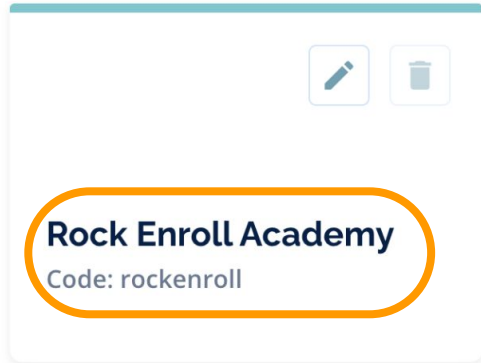
# Link Organizations

## School Groups

Linked organizations will appear in the School Groups area of the Common App Organization. The school code will be automatically set using the Participating Organization's domain.

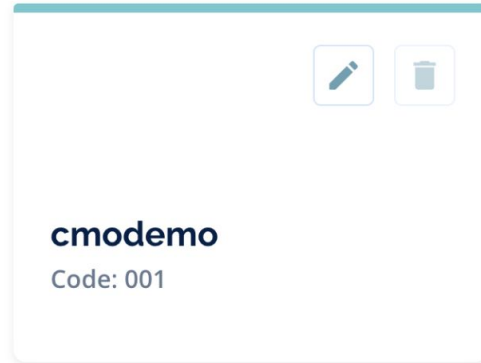
### School Groups

Add, edit, and delete schools groups for use within the system.



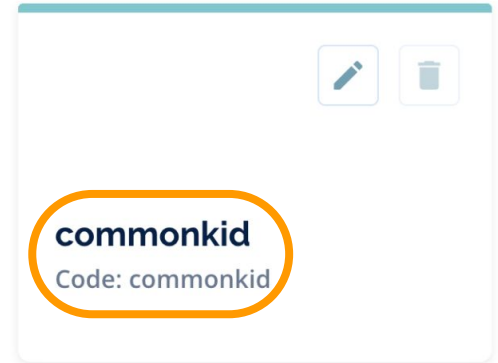
Rock Enroll Academy  
Code: rockenroll

This card represents a school group. It features a teal header bar and two icons in the top right corner: a pencil for editing and a trash can for deletion. The name 'Rock Enroll Academy' and its code 'Code: rockenroll' are displayed in the center. The name and code are enclosed in a rounded orange border.



cmodemo  
Code: 001

This card represents a school group. It features a teal header bar and two icons in the top right corner: a pencil for editing and a trash can for deletion. The name 'cmodemo' and its code 'Code: 001' are displayed in the center.



commonkid  
Code: commonkid

This card represents a school group. It features a teal header bar and two icons in the top right corner: a pencil for editing and a trash can for deletion. The name 'commonkid' and its code 'Code: commonkid' are displayed in the center. The name and code are enclosed in a rounded orange border.

# Link Organizations

Send Programs from the Participating Organization to the Common App Organization

RE Ins Band Fall: [Edit](#) Cancel Save Program

**PROGRAM INFORMATION** APPLICATION SETTINGS SCHOOLFINDER

School\*  
Rock Enroll Instrumental

Program Category\*  
Fall Courses

Program Name\*  
RE Ins Band Fall

Program Abbreviation  
RBF

Program Enabled

Enable in Common App

You will create your schools, programs, and grade data in the Participating Organization

To sync the programs that will participate in the Common App process the user can set the individual program or use the bulk setting.



Enable in Common App

## Bulk Actions



Set Finder Settings


Set Common App Programs



Program N

# Link Organizations

Send Programs from the Participating Organization to the Common App Organization

Participating Org			Program Name	Category	Enabled	Open Grades	Actions
<input type="checkbox"/>	31115	CE	Carrot Elementary	Veggie Schools	Y	K, 1, 2, 3, 4, 5	  <a href="#">Disable</a>



Common App Org			Program Name	Category	Enabled	Open Grades	Actions
<input type="checkbox"/>	31169	CE	31115-Carrot Elementary	10521-CHCT	Y	K, 1, 2, 3, 4, 5	  <a href="#">Disable</a>

When the program is enabled for Common App it will send the below details from the Participating Org to the Common App Org

- **Program Details:** Program Name, Grades, and a unique Program Category will be created
- **School Details:** School Name, School Level, School Address, and a unique School Code will be created

# Copy Script

The Centralized Copy Script sends students when they are on the offered lottery list and have accepted their seat.

The screenshot displays the 'Lotteries & Plac...' section in the SchoolMint system. It shows the status of applications for two different grades: Grade 4 and Grade 5. For each grade, there is an 'OFFERED LIST' and a 'WAITING LIST'. The 'OFFERED LIST' for Grade 4 shows two students: Jorge Ibarra and Rebecca Bowman. The 'OFFERED LIST' for Grade 5 shows one student: Jorge Ibarra. The interface includes a navigation bar at the top with various tabs like 'Enroll Dev', 'Release', 'Enroll Ideas', 'Maint', and 'Community'. A video player is visible at the bottom of the screen.

OFFERED LIST *0 Assigned, 1 Seat(s) Available*

No applications on Offered List

WAITING LIST *0 Waitlisted*

No applications on Waiting List

**Grade: 4**

OFFERED LIST *2 Assigned, 1 Seat(s) Available* Grade Published ✓

ID#	Student Na...	Priority	Sub-Lottery	Status	Pool	Rank	Original Rank	Manual Indicator	Published	Offer	Actions
101957...	Ibarra, Jorge	Multiple Priorities (2)	1	✓	1	1	1	1	Yes		⋮
102191...	Bowman, Re...	No Priority	5		1	2	2	0	Yes		⋮

WAITING LIST *0 Waitlisted*

No applications on Waiting List

**Grade: 5**

OFFERED LIST *2 Assigned, 0 Seat(s) Available* Grade Published ✓

ID#	Student Na...	Priority	Sub-Lottery	Status	Pool	Rank	Original Rank	Manual Indicator	Published	Offer	Actions
101957...	Ibarra, Jorge	Multiple Priorities (2)	1	✓	1	1	1	0	Yes		⋮

PE: testing [08/19/2025, 2:00 PM]  
DE: testing [08/19/2025, 1:51 PM]  
OR: testing\_cmodemo Org ID: 10020

# Copy Script

The Centralized Copy Script sends students when they are on the offered lottery list and have accepted their seat.

Identify applications that were copied to participating schools during this date range.

## Common App Students

From

08/01/2025



To

08/31/2025



A new filter is now available in the Participating Organization view. This filter lets users search for applications that were sent using the Copy Script, within a selected date range.

# Site Selection Tool

## Guardian Site Selection Tool



Dashboard



Messages



English



Elizabeth...

2021-...

cmodemo

commonkid

When a student linked to a guardian's account has been sent to a **Participating Organization**, the guardian will have the option to switch to other organizations using the **Site Selection Tool** in the upper-right corner.

Before switching, the guardian will see an alert asking them to confirm that they want to move to another site.

### You're Switching Organizations

#### Welcome to commonkid

Please note that you are leaving your current organization and entering commonkid.

- You may switch sites as many times as needed.

Cancel

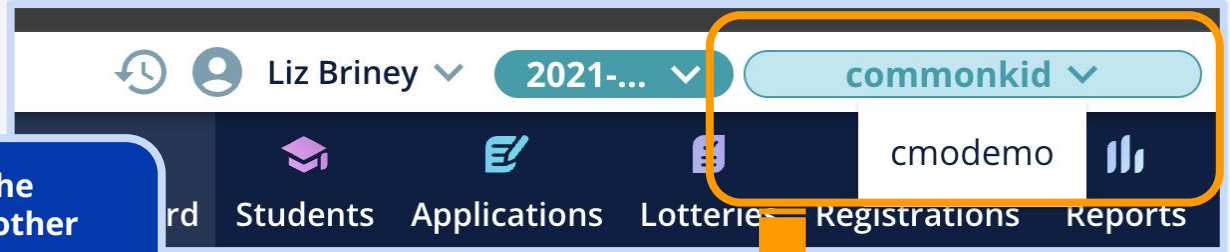
Continue

# Site Selection Tool

## Admin Site Selection Tool

Admins will have the ability to move to other Common App Organizations that are linked when the user exists. In order to move between sites the user must have the permission `Allow Cross-Site Access`.

When the user navigates to a new org they will retain the program access from their home organization but will need to be placed into a user group.



### You're Switching Organizations ×

#### Welcome to cmodemo

Please note that you are leaving your current organization and entering cmodemo.

- You may switch sites as many times as needed.
- Your level of access is unique to each site.

Cancel

Continue

# Site Selection Tool

## Admin Site Selection Tool

The screenshot displays the SchoolMint Admin Site Selection Tool interface. At the top, the breadcrumb navigation shows 'cmodemo | Dashboard: 2021-2022'. The user profile 'Liz Briney' is visible, along with a '2021-...' dropdown menu and a 'cmodemo' dropdown menu. The main navigation bar includes 'SchoolMint Enroll' and 'Applications'. A yellow notification banner at the top of the content area reads: 'You are currently logged into cmodemo. Use the Site Selection Dropdown to switch to another site.' Below the banner, the text 'Welcome, Liz!' is displayed.

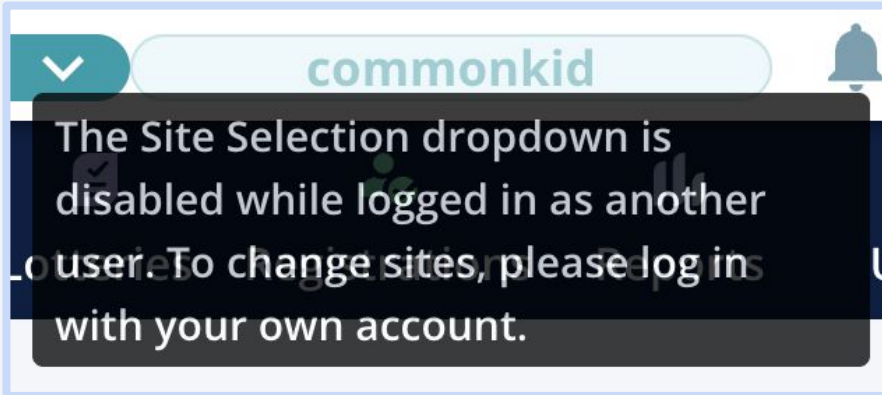
**When an admin navigates to a linked Common App organization that is not their home organization, an alert will appear at the top of the page to let them know they are logged in to a different organization.**

# Site Selection Tool

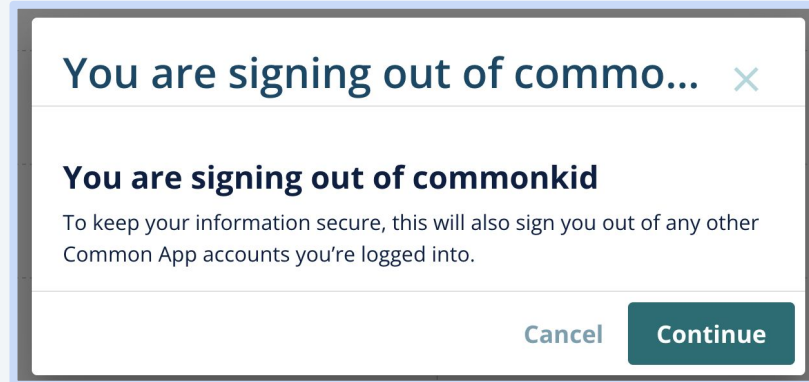
## Security

When using the Login As feature the option to use the Site Selection Tool will be disabled

When a user signs out of a Common App organization they will be signed out of all other Common App organizations where they have a user account.



The Site Selection dropdown is disabled while logged in as another user. To change sites, please log in with your own account.



You are signing out of commo... x

**You are signing out of commonkid**

To keep your information secure, this will also sign you out of any other Common App accounts you're logged into.

Cancel Continue



# Common App

## FAQs & Troubleshooting tips

- School year compatibility - When connecting your Common App organizations, please ensure that you are in the same school year for both organizations.
- Roll Over is currently not available for Common App Orgs - this is a top priority item for an upcoming release.
- The bulk setting for Common App is not working at time of release but will be prioritized for an upcoming release.
- When syncing Programs you will need to set the application process for the program in the Common App org, this data is not sent over.
- When syncing Programs the Program Name, will be prepended with the program ID. This is to help with identifying which organization the program came from but can be edited by the user if they would like to remove it.
- We recommend creating the same form in the Common App organization and in the Participating Organization - the ability to sync the form is a feature being evaluated for an upcoming release.



# Common App

## FAQs & Troubleshooting tips

- The copy script is currently copying siblings linked to a student when the accepting student is copied. This allows the siblings to show up in the Student Module but is not considered a student that is fully copied via the copy script. These students will not show up on the Guardian Dashboard or in the Application Module. We are currently evaluating this behavior to determine changes to be made.
- Users: Only admins with parentOrg as homeOrg can have access to **all** child Orgs (when they have the Allow Cross-Site Access permission), admins with childOrg as homeOrg will only be able to move between their childOrg and parentOrg.



Feature Highlight

# Autofill Fields



# Autofill Fields

Autofill fields for students under the same guardian account.

Order	Form Field Label	Type	Attributes	Autofill Data	Actions
=	* <b>Emergency Contact Name</b> student_annual.emergency1_name	Text	Required: Guardian Disabled:	<input checked="" type="checkbox"/>	
=	* <b>Emergency Contact Phone</b> student_annual.emergency1_phone	Number	Required: Guardian Disabled:	<input checked="" type="checkbox"/>	⋮
=	* <b>Emergency Contact Relationship</b> student_annual.emergency1_relation	Dropdown	Required: Guardian Disabled:	<input checked="" type="checkbox"/>	⋮

Set fields to autofill in the form builder

# Autofill Fields

Autofill fields for students under the same guardian account.

## Emergency Contacts

3/8

One or more fields below can be autofill with saved information. Fields can still be edited after autofill, please confirm.

**Yes, Autofill**

Emergency Contact Name \*

Emergency Contact Phone \*

Emergency Contact Relationship \*

The autofill button will appear above the first field in the form set for autofill. When clicked the data will be copied from the last student completed by the guardian.

We do not recommend using disabled actions when setting a field for autofill capability.

# Autofill Fields

Demo



# Autofill Fields

## FAQs & Troubleshooting tips

- Autofill will be based off of the data for the last student saved.
- When creating the first student on the guardian's account you will not see an option for autofill.
- Autofill is not available for the following form types and field types:
  - Form Types: Recommendations, Recruitment,
  - Field Types: Fields saved to the Application and Registration records, Sibling, Program Choice, File Upload, Events, Signature, Content Snippet
- If a user needs to edit a input from the autofill they are able to do so as long as the field is not set to disabled.
  - We do not recommend using a disabled field setting in combination with the autofill field feature. This can result in inaccurate data or data that cannot be changed from student to student
- If a field was originally filled in using autofill and you later change that field for one student (after their forms are completed), the update will only apply to that student. The change will not carry over to other students.
- The autofill text is editable in platform content:
  - Banner: `formProcess.student.autofill.content`
  - Button: `formProcess.student.autofill.confirm`

# Autofill Fields

## FAQs & Troubleshooting tips

For new orgs the seeder has been updated to have the following fields already set for autofill.

- **Guardian Fields:**

- student\_annual.guardian1\_address
- student\_annual.guardian2\_address
- student\_annual.guardian1\_fname
- student\_annual.guardian1\_lname
- student\_annual.guardian1\_email  
(uses the email input when email is used for signup)
- student\_annual.guardian1\_phone  
(uses the phone input when phone is used for signup)

- **Emergency Contact Fields:**

- student\_annual.emergency1\_name
- student\_annual.emergency1\_relation
- student\_annual.emergency1\_phone
- student\_annual.emergency1\_email
- student\_annual.emergency1\_pickup
- student\_annual.emergency2\_name
- student\_annual.emergency2\_relation
- student\_annual.emergency2\_phone
- student\_annual.emergency2\_email
- student\_annual.emergency2\_pickup
- student\_annual.emergency3\_name
- student\_annual.emergency3\_relation
- student\_annual.emergency3\_phone
- student\_annual.emergency3\_email
- student\_annual.emergency3\_pickup



Feature Highlight

# Nest Filters in Reports & Dynamic Views



# Nested Filters in Reports & Dynamic Views

Create more in depth reports and dynamic views using nested groups.

Add Filters

Match **ANY** ALL of the following conditions

Add Condition Add Nested Group

Cancel Apply Filters

Add Filters

Match **ANY** ALL of the following conditions

Value Lookup application.status Operator IS Expected Value Eligible

AND

Value Lookup application.withdrawn Operator IS Expected Value Not Withdrawn

AND

Select Field lottery\_rankings.lott... Operator IS Expected Value offered

AND

Match **ANY** ALL of the following conditions

Select Field programs.categor... Operator IS Expected Value 2042

OR

Select Field programs.categor... Operator IS Expected Value 2296

In reports and dynamic views you know have the ability to add nested filters. The image shown here is a set of filters that answer this request from a current customer:

- application.withdrawn = 0
- AND application.status = 1
- AND lottery\_rankings.lottery\_list = offered
- AND programs.category\_id = 2042
- OR 2296

# Nested Filters in Reports & Dynamic Views

View of report created from the filter set

Report: **Nested Filters Report** Report History Export Back to Reports

35 Records

Applied Filters: application.status IS 1 application.withdrawn IS 0 lottery\_rankings.lottery\_list IS offered **programs.category\_id IS 2042 AND programs.category\_id IS 2...**

status	lottery_list	
Eligible	Offered	
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2296
Eligible	Offered	2296
Eligible	Offered	2296
Eligible	Offered	2296
Eligible	Offered	2042
Eligible	Offered	2042
Eligible	Offered	2042

**Nested filters will display in the same pill**

# Nested Filters in Reports & Dynamic Views

## FAQs

- Nested Filters are available on the following areas
  - Students Module
  - Applications Module
  - Registrations Module
  - Reports Module



Feature Highlight

# Accessibility Updates

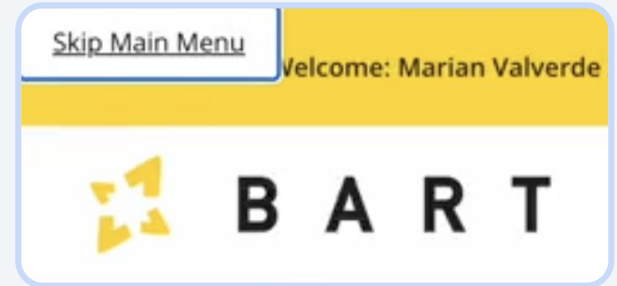


# Improvements for Broader Usability

## 1. Bypass Blocks:

Accessible products need to provide a way to skip repeating content

- Why it's important:** Users reliant on keyboard and screen readers can move around pages efficiently.
- 3.0 Update:** We added an action available only to keyboard and screen reader users that lets them skip the main navigation and go directly to the content.



## 2. Focus Not Obscured

Ensure when an item gets keyboard focus, it is at least partially visible.

- Why it's important:** People who can't use a mouse need to see what has keyboard focus.
- 3.0 Update:** We updated the form flows to make sure fields that have keyboard focus are never behind the "Save and Continue" actions bar and are always visible.



Feature Highlight

# Recruitment

New module powered by SchoolMint Enroll





# Recruitment 3.0 Features

- Forms
- Events
- New Leads Created  
Workflow Notification





Feature Highlight

# Recruitment Forms



# Recruitment Forms

Create and manage forms used in the enrollment process.

[Form Field Download](#)

[Student Information](#) >

**[Recruitment](#)** >

[Registration & Re-reg](#)

[Custom School Tabs](#)

**General Inquiry**  
Form Process  
[Manage Steps](#)

A new Recruitment form type is now available.

- To access the form, enable the Edit/Create Recruitment Forms user permission.
- The default form for this type is called General Inquiry.
- The General Inquiry form cannot be deleted.

# Recruitment Forms

## General Inquiry: [Edit](#)

### Form Parameters

Form Name\*  
General Inquiry

### Set Lead Attributes on Submitted Forms:

Lead Stage & Status* Interest-Inquiry	▼	+
Default Lead Source* SchoolMint Forms	▼	+
Default Lead Source Detail General Inquiry	▼	+

### After this form is submitted:

Confirmation Message  
<span>Thank you</span> <br> for submitting an inquiry form to {

Redirect to Another Page

You can set the lead attributes for each form directly in the edit form page.

- **Lead Stage & Status** - Set the Stage & Status for a lead when they inquire via the form. You can quickly navigate to the Stages & Statuses management page by clicking the '+' button.
- **Default Lead Source** - A predefined set of lead sources is automatically created in Custom Data. You can add more lead sources at any time by clicking the + button.
- **Default Lead Source Detail** - Add extra information about the lead source, such as the specific form or process the lead completed. This helps you better understand how leads are coming to your organization.

# Recruitment Forms

## General Inquiry: [Edit](#)

### Form Parameters

Form Name\*  
General Inquiry

### Set Lead Attributes on Submitted Forms:

Lead Stage & Status\*  
Interest-Inquiry

Default Lead Source\*

Update the message the Lead will see when the form is submitted

### After this form is submitted:

Confirmation Message  
<span>Thank you</span> <br> for submitting an inquiry form to {

Redirect to Another Page

Not

Se



## Thank you

for submitting an inquiry form to cmodemo.  
We will be in touch soon!

Take the Next Step!

Message shown to Lead

# Recruitment Forms

## General Inquiry: Edit

Cancel

Share/Embed Form

Save

### Form Parameters

Form Name \*

Set the notification template for the form.

To create a new template, click the '+' button. A modal will appear where you can quickly add the new notification template.

Default Lead Source \*

SchoolMint Forms



Default Lead Source Detail

General Inquiry



### After this form is submitted:

Confirmation Message

<span>Thank you</span> <br> for submitting an inquiry form to {

Redirect to Another Page

### Notification to Leads:

Select Notification Template:

Interest Form Submitted



## Add New Communication Template

### General Information

Content Name \*

Type \*

Description

### Information

Use for a Workflow

All Schools/Programs

### Language & Translations

EN

ES

Enter in a Text Message \*

123 characters remaining in your text message

Enter Email Subject Line \*

Cancel

Save Template

# Recruitment Forms

Share/ embed forms

General Inquiry  
Form Process  
Manage Steps

- Edit
- Duplicate
- Delete
- Share/Embed Form

Cancel Share/Embed Form Save

Share Embed

Set lead source on submitted forms and copy link below to share.

Form: General Inquiry

Lead Source\*  
SchoolMint Forms

Lead Source Detail  
General Inquiry

<https://cmodem.undefined/attract/form/202> Copy Link

The ability to share or embed a Recruitment form is available in the 3 dot action menu or when directly editing the form.

- To access the Share/Embed option, enable the Share Recruitment Forms user permission.

# Recruitment Forms

## Adding fields to your forms

Order	Form Field Label	Type	Attributes	Actions
=	* <b>Guardian First Name</b> lead_annual.guardian_first_name	Text	Required: Guardian Disabled:	
=	* <b>Guardian Last Name</b> lead_annual.guardian_last_name	Text	Required: Guardian Disabled:	
=	<b>Email</b> lead_annual.guardian_email	Email	Required: Disabled:	
=	<b>Phone Number</b> lead_annual.guardian_phone	Number	Required: Disabled:	

**When you create a new Recruitment form, four default fields will be included: Guardian First Name, Guardian Last Name, Email, and Phone Number. At least one contact method (Email or Phone Number) is required in order to create a lead.**



Feature Highlight

# Recruitment Events



# Recruitment Events

## Creating a Recruitment Event

### Event Setup: Details

Event name \*  
Open House

Event Category  
Recruitment

Event Type \*  
Open house

Two new fields are now available in the Events module when creating a Recruitment event:

- **Event Category** – Determines which options appear when adding an event to the form. Once set this field is locked and cannot be changed. *(Currently, this field is only available for Recruitment.)*
- **Event Type** – Lets admins define different event types, which can then be used in reporting. This field uses a default custom data source; admins can add additional types using the `+` button to bring up a modal.

### Event Types

Data Source Name \*  
Event Types

Order	Option Value	Label (only if different than value)	Default	Actions
=	Option Value * Open house	Label Open house	<input checked="" type="radio"/>	+
=	Option Value * School tour	Label School tour	<input type="radio"/>	+
=	Option Value * Audition	Label Audition	<input type="radio"/>	+
=	Option Value * Testing	Label Testing	<input type="radio"/>	+
=	Option Value * Information Session	Label Information Session	<input type="radio"/>	+

# Recruitment Events

Adding event fields to your forms

## Event Setup: Details

Event name \*  
Open House

Event Category  
Recruitment

Event Type \*  
Open house

Field Type \*  
Scheduling/Events

Field Label \*  
Open House

## Step 2: Add Field

When adding a Scheduling/ Event field type to the Recruitment form the admin will only see event types that are set with the Recruitment category from the event set up.

Event

Event Type(s)

Select Event(s) \*

Open House

restrictions



# Recruitment Events

## Lead View of a Recruitment Form with an Event

Thank you for your interest in Rock Enroll Academy, please submit this form and we will contact you with next steps.

Guardian First Name \*

Guardian Last Name \*

Email

Phone Number  
( ) - -

**Open House**

**Open House** **Book Session**

The Lead will see the option to book an event when completing the inquiry form.

Guardian First Name \*

### Open House

New Family Open House

Select a session below. Length: 120 min.

< Sat, Aug 30th, 2025 >

Location & Details	Time
Open House:	05:00
School House Q	PM

# Recruitment Events

## Events on the Leads Table

<input type="checkbox"/>	Guardian Name	Student Name	Current Grade	Incoming Grade	Lead Source	Lead Source Detail	Lead Stage	Lead Status	Last Contact
<input type="checkbox"/>	Nicole Colyer				Phone		Interest	Contacted	
<input type="checkbox"/>	Alfredo Campos				SchoolMint Ads	In Person	Interest	Inquiry	
<input type="checkbox"/>	Abraham Meza				SchoolMint Forms	General Inquiry	Prospect	RSVP'd to Eve...	2025-08-20 12:28
<input type="checkbox"/>	Tassnim Alkusaimi				SchoolMint Forms	General Inquiry	Prospect	Attended Eve...	2025-08-20 12:28
<input type="checkbox"/>	Caitlin Mayer				SchoolMint Forms	General Inquiry	Prospect	RSVP'd to Eve...	2025-08-20 11:48

When a lead books an event, their Lead Stage will automatically update to `Prospect` (showing they are a warmer lead), and their Lead Status will update to `RSVP'd to Event`.

If a lead is not linked to a student, the Student Name column will display `No student name was provided`.

<input type="checkbox"/>	Guardian(s) Name	Student Name
<input type="checkbox"/>	Caitlin Mayer	No student name was provided
<input type="checkbox"/>	Tassnim Alkusaimi	No student name was provided
<input type="checkbox"/>	Abraham Meza	No student name was provided



Feature Highlight

# Recruitment Workflow Notification



# Recruitment Workflow Notification

## Notifications: Add New

Cancel

Save Notification

### This Workflow Notification is For:

Select \*

Recruitment

### Primary Settings:

Workflow Notification Name \*

New Lead Created

Description

Notify admin when a new lead is created

216 characters remaining

### Admins to Notify: (At least one required\*)

Select User Group(s) to Notify

Super Admin

Enter Email Address(es) to Notify

1500 of 1500 email addresses allowed

### Admin Notification Types:

Select Communication Template \*

New Lead Created

+

### Notification Trigger \*:

Select a Notification Trigger \*

New Leads Created

Include manually added leads

**Add a workflow notification for Recruitment. This notification is triggered when a new lead is created (using the "New Lead Created" trigger) and is sent to admins. Custom notification triggers are not available at this time.**

**Thank you!**