



# SchoolMint Enroll Lottery Webinar Series

# Meet the Hosts

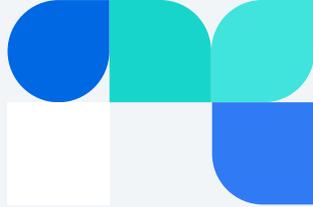


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Presenter



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Customer Experience Specialist  
Chat and Q&A





## Session 1 Goals

- Understand Application Processing
- Learn Effective Communication Strategies
- Awareness of Lottery Setting Considerations



# Logistics



Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end

- Ask general questions throughout by clicking **Q&A**
- Send site specific questions to [schoolmint.zendesk.com](https://schoolmint.zendesk.com)

Survey at the end

# Session 1:

# Preparing for Success





# The Lottery Module in SchoolMint Enroll

When there are more students who want to attend a school/program than seats available, a lottery can be run. A lottery is a fair and equitable placement process organizations can utilize to place students who want to attend their school(s).

For most organizations, there will be a single application window, the lottery will be run, and then students offered seats will accept/decline and continue on to register at the school (either within Enroll or utilizing the school's external registration process). There are some organizations who have the application window open after the lottery is initially run, and will continue to place students throughout the year.

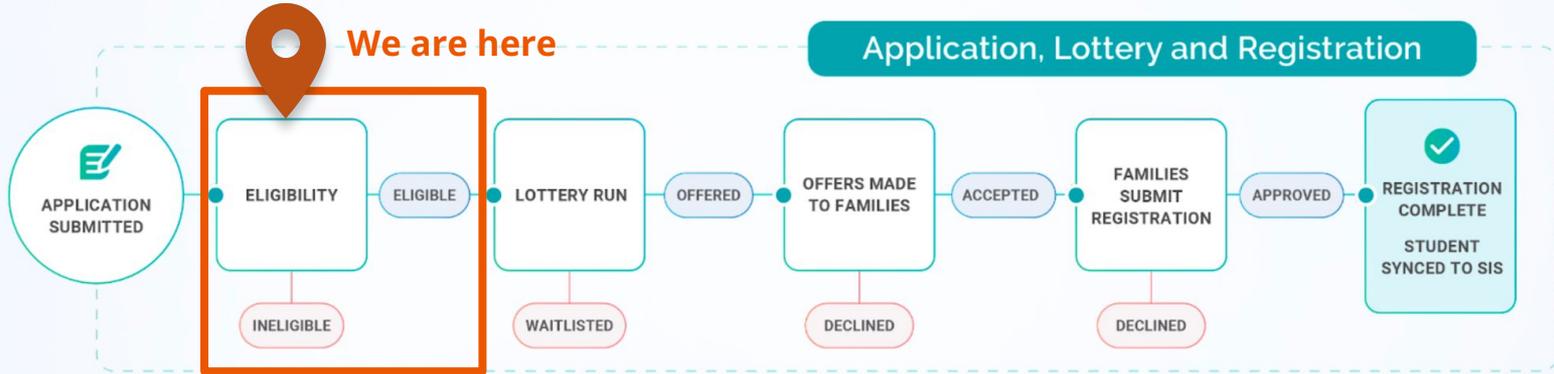
Lotteries will vary from very simple to very complicated. Every organization's lottery process can and will be different, so it's important to understand all the different ways a lottery can run and function on Enroll.



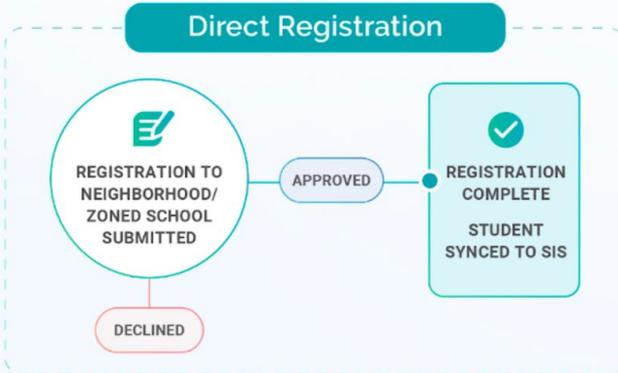
# SchoolMint Enroll | Enrollment Flow

We are here

## Application, Lottery and Registration



## Direct Registration



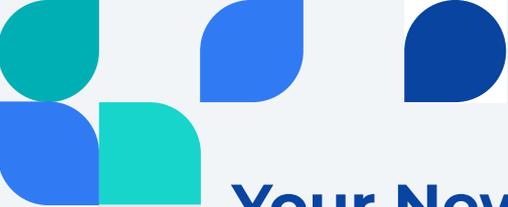
## Re-Registration





# Poll: How prepared do you feel for your lottery?

- I am extremely prepared, and I am confident in a smooth lottery process
- I am somewhat prepared, but not fully confident in my processes
- I am not prepared, and my world is on fire!
- I have to prepare for my lottery?



## Your New Mantra: **Prepare, Practice, Process!**

- You should begin your lottery process **early!**
- Mistakes can happen! But they are easy to catch with **testing!**
- Use the tools Enroll has available for you to **simplify processes!**
- To guarantee good, valid results, **review your applications!**
- **Set a Plan, Start Early, Reduce Stress!**

# How do I ensure I'm prepared for my lottery?



# Step One:

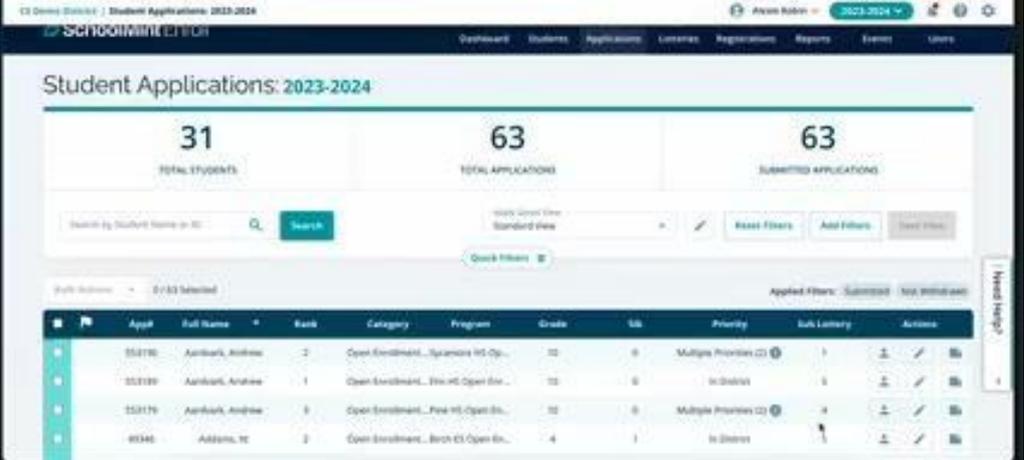
## Review Your Flags



# Reviewing and Dismissing Flags

Flags are a great way to isolate applications that need further review. The best part? They are retroactive!

- Age Verification
- Duplicate Student
- Ineligible due to changes
- Custom Flags



Dashboard | Students | Applications | Lotteries | Registrations | Reports | Events | Users

## Student Applications: 2023-2024

31 TOTAL STUDENTS      63 TOTAL APPLICATIONS      63 SUBMITTED APPLICATIONS

Search by Student Name (or ID)       

Quick Filters:

App#	Full Name	Rank	Category	Program	Grade	Lot	Priority	App Lottery	Actions
552176	Ashbark, Andrew	2	Open Enrollment... Spansia HS Op...		10	0	Multiple Priorities (2)	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
552189	Ashbark, Andrew	1	Open Enrollment... Elm HS Open En...		10	0	In District	0	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
552176	Ashbark, Andrew	3	Open Enrollment... Pine HS Open En...		10	0	Multiple Priorities (2)	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
49346	Adams, TC	2	Open Enrollment... Birch El Open En...		4	1	In District	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**Note:** A flag won't prevent a student from being updated to Eligible or placed on the lottery, but they are important to review to guarantee the best results!

# Manage Your Duplicate Students

Duplicate students are students who have the same data for the following:

- Student First Name
- Student Last Name
- Student DOB
- Student Grade



**NOTE:** Prevent duplicates from being created in the first place by navigating to **Settings > Forms > Student Information > Edit** and enabling **Do not allow guardians to create duplicate students**

[Click Here: Merging Students Resource](#)

# Step Two:

## Validate Your Priorities



# When to Use Manual vs. Automatic Priorities

## Manual:

The priority has details that need to be processed more thoroughly by an admin, and need to be individually assessed before assignment

## Automatic:

The priority is has little to no approval process for the student to receive the priority. Ideal for schools with many students who are applicable for the priority.

# Managing and Overriding Priorities

## Application > Quick Filters > Priority Dropdown

Admins with edit permissions can go into the **Edit** area of the application, review data as needed, and update manual and/or override the automatic priorities. Don't forget to click **Save Application!**

Priority Name	Settings	Eligible	Ineligible	Pending	Override
Income Eligible	Manual Priority	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	--
Board Member	Manual Priority	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	--
Sibling Applying	Automatic Priority - Assigned by System	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

**Note:** You will need to keep the override ON in order for the override to stick!

# Step Three:

## Updating Application Status



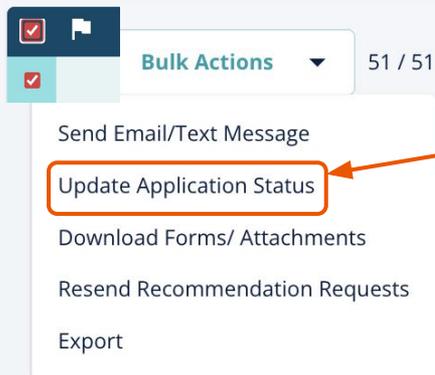
# Update Application Status

Update Applications from **In Processing** to **Eligible** or **Ineligible** for lottery run

**Note: Applications must be in an Eligible status in order to run in the lottery**

## Bulk Update Selected Forms' Statuses:

Filter to find the students you want to bulk update, and use bulk select in the top-left corner



**Note:** Give the system enough time to complete the bulk action—check for any remaining applications in an In Processing status before running the lottery!!

# Control WHEN and IF guardians are notified about their application status!

With our 2.1 Release last year, we added the option to SHOW or HIDE application status on the Guardian Dashboard!

This allows organizations to determine when and if guardians are notified about a change to their application status.

**Settings > Schools/Programs > Manage Programs > Edit > Application Settings**

Show eligibility status on guardian dashboard

#### Notifications to Guardians:

Application Submitted

Application Complete



Application Status Change

Application Eligibility Status Change - Parent Notification



Check out our new status change notifications!

[Click Here to Learn More](#)

# Step Four:

## Review and Update Notifications

# Guardian Notifications: Lottery Email & Text Templates

## Settings > Content/Letters > Email and Text Templates

- Lottery Placement Accepted - Parent Notification
- Lottery Placement Declined - Parent Notification
- Lottery Results - Waiting List
- Lottery Results - Offered
- Lottery Placement Email Consolidated - Sent to All Students Placed

Assign these emails under:

**Schools/Programs > Manage Programs > Edit > Lottery Settings**

## Using Consolidated vs. Individual Placement Notifications

### **Consolidated:**

Sends one email notification to all students placed and what list they are in. Ideal for schools that want to keep notifications to a minimum

### **Individual:**

Sends an email for each placement that the student is in and where they are placed. Ideal for placement-specific verbiage

## Create Custom Notifications for Each Program!

**Enroll has the ability to send program-specific information**

This is great for schools that want to include next steps for their specific enrollment processes, or welcome families in their own, unique way!

### Step One:

Under Settings > Content/Letters > Email and Text Templates, click Add New Template

### Step Two:

Name your new content, set the Type as Lottery, and include the text and email information you want to provide (if you have custom translations, remember to translate!), and Save

### Step Three:

Under Settings > Schools/Programs > Manage Programs > Edit > Lottery Settings, assign your updated email to the appropriate program

## Admin Notifications: Lottery Email & Text Templates

Settings > Content/Letters > Email and Text Templates

- Lottery Placement Accepted - Admin Notification
- Lottery Placement Declined - Admin Notification



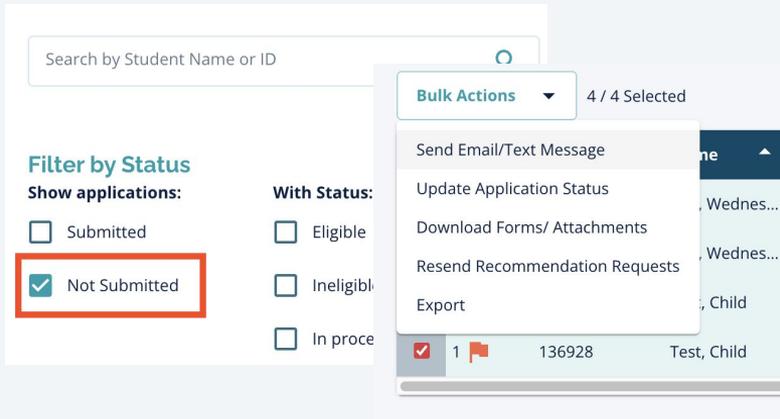
Try out our new Workflow Notifications!

[Click Here to Learn More](#)

# Pro Tip: Bulk Email your Unsubmitted Applicants!

**Under Application > Quick Filters, you can filter for Not Submitted applications**

After filtering, you can bulk email those parents to remind them that the lottery window is approaching in an effort to guide them towards completing the form.



Search by Student Name or ID

**Filter by Status**  
**Show applications:**

- Submitted
- Not Submitted

**With Status:**

- Eligible
- Ineligible
- In process

**Bulk Actions** 4 / 4 Selected

- Send Email/Text Message
- Update Application Status
- Download Forms/ Attachments
- Resend Recommendation Requests
- Export

<input checked="" type="checkbox"/>	1	136928	Test, Child
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# Practice, Practice, Practice!

Go through your process **in your Sandbox site** to get familiar with your flows if you aren't confident yet on Production!

If possible, we recommend doing your prepare steps **as soon as applications start to come in** in order to help reduce stress and time spent processing all at once!





# Quiz: What is your new mantra for lottery?

- Start Late, Don't Test, Be Last Minute!
- Prepare, Practice, Process!
- Pray, Pray, Pray!

# Lottery Session 2:

## Running a Smooth Lottery

- Utilizing Lottery Designs for Efficiency
- Ensuring Correct Settings for Runtime
- Handling Unexpected Challenges

February 8, 2024

[Click Here to Register](#)

**Zendesk**

**Help Articles**

**Webinar Recordings and Slide Decks**

**Issues, Bugs, and General Q&As**

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

# Questions & Answers

<b>When changing a student's status to Eligible, does this automatically remove any flags on a student's record?</b>	No, it will not. To dismiss the flag you will click on the flag icon > Review > Dismiss.
<b>When you change a students status to eligible, does it send the guardian a notification?</b>	Refer to <a href="#">This Slide</a> or check out our <a href="#">Enroll User Guide!</a>
<b>When merging students, if a student is a duplicate, but one has an application in the previous year, should we use the profile with the older application as a source student? If so, will we have to resubmit their application for the current student on their behalf?</b>	This is up to the admin's discretion! You'll typically want to go with the most up-to-date data, and your source student should be the one with the most accurate student profile data (first/last name, dob, ID, etc). However, the merge tool allows you to select each data point from both students you want to use, and even what application form(s) should be connected!
<b>Is there a way use Workflow Notifications for notes?</b>	No, you are not able to set a workflow notification for notes, but this is a great <a href="#">feature request</a> to add to our Community Portal!
<b>A way to add notes using the bulk feature</b>	Bulk Feature will only allow you to Send Emails, Update Status, Download Forms, Resend Recommendation Requests and Export. This is a great <a href="#">feature request</a> to add to our Community Portal!

# Questions & Answers

<b>Will the Consolidated Email include all students associated with that Guardian Account?</b>	No, the consolidated email will send to each individual student placed, but include all of that student's placements in the email!
<b>Will families have the link to accept the offer?</b>	Under Settings > Manage Lotteries > Lottery Settings you can allow families to accept their seats on their guardian dashboard.
<b>Are admins able to take away parent access from withdrawing applications?</b>	Yes! This access can be added or removed under Settings > General
<b>Can you check if a parent created a SM account but has no applications?</b>	You can go to Users > Guardian Accounts > Search the name and it will give you student information and any applications submitted.
<b>Is there way admin users can copy their live site to the sandbox or do we need to contact our rep each time?</b>	You will need to contact your rep or our Zendesk Support Team to request a refresh
<b>If parents are divorced and each parent creates an account and submits an application, will each parent still receive notification once you merge the duplicate application?</b>	Correct! Each guardian account connected to the student will receive notifications

# THANK YOU!





# SchoolMint Enroll