Session 2:
Running a Smooth Lottery

Meet the Hosts

Alexis Robin
Sr. Professional Services Specialist
Presenter

Jamey Arnette
Manager of Customer Experience
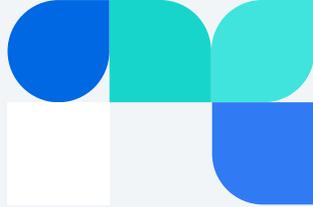**Chat and Q&A**

Logistics

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

Q&A provided in Follow-Up
- Ask general questions throughout by clicking **Q&A**
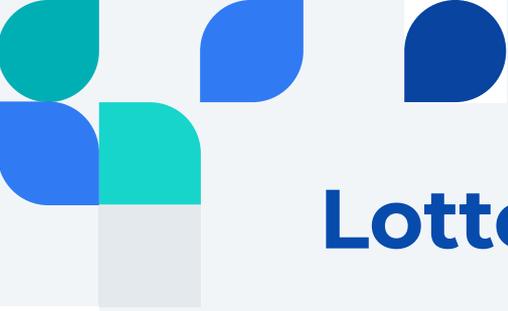- Send site specific questions to **schoolmint.zendesk.com**

Survey at the end

SchoolMint

Session 2 Goals

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

SchoolMint.

Lottery Module

Lottery Module in SchoolMint

When there are more students who want to attend a school/program than there are seats available, a lottery will be run. A lottery is a fair and equitable placement process orgs will 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).

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.

SchoolMint.
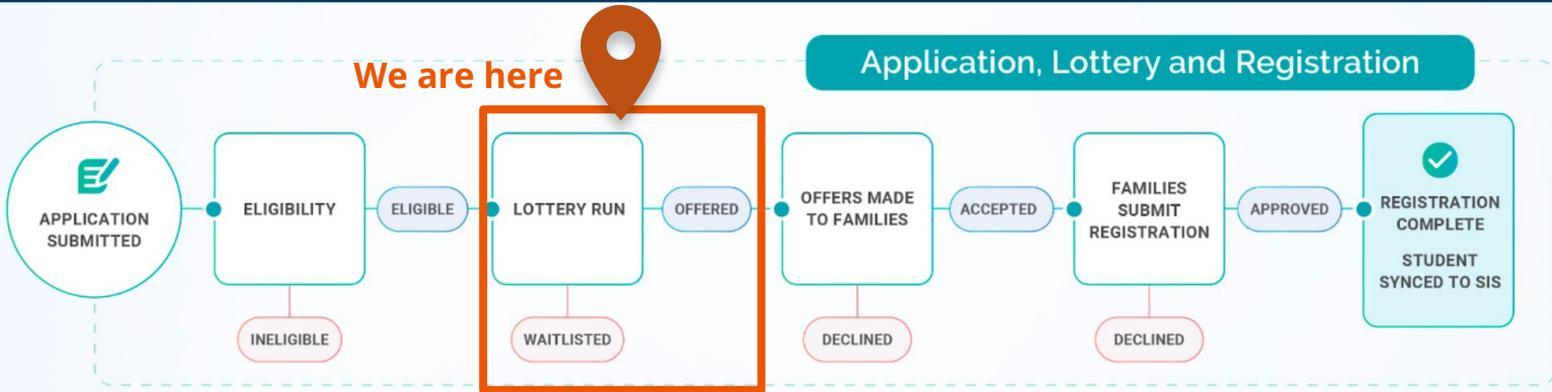
Poll: If your lottery were a game show, which host would you want to guide you through the process?

Oprah Winfrey

Alex Trebek

Meredith Vieira
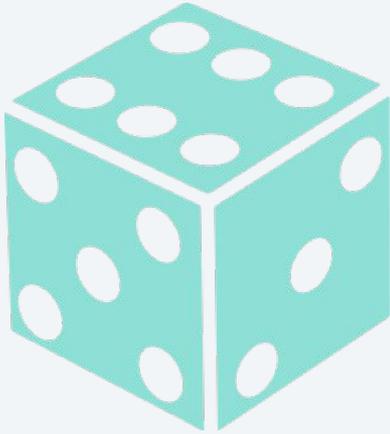
Steve Harvey

Lottery Priorities

Lottery: Priorities

Settings > Manage Lotteries > Lottery Priorities

Priorities are used to give students a **higher chance** to be placed on the offered list. They determine where a student's application sits **relative to others**, and how "high" on the list that student is placed. Students with priorities are **more likely** to get into a school/program when the lottery is run, or will sit higher on the waitlist if there is no space left on the offered list.

Manual vs. Automatic Priorities

Manual:

Applied manually by the admin to an application during the review process. This is usually done when there is more scrutiny required when awarding this priority.

Automatic:

Automatically assigned for students who meet the corresponding criteria. Can be calculated by the system using student data tied to questions on the application

Create a Priority

1. Go to Settings > Manage Lotteries > Lottery Priorities
2. Click on Add New Priority
3. Configure the settings outlined in the screenshot below

Lottery Priorities: Add New

Priority Information

Give it a name that is easily identifiable

Priority Name *

Used in some Reports and Views

Abbreviation

Choose to save to the Application or Student

Save To
Application

Options

☑ Automatically Set

☐ Allow Override

☐ Clear on Roll Over

If Enabled: Allows configuration of logic with rules engine

If Enabled: Allows admins to override logic of automatic priority

If Enabled: Priority won't carry over into next school year

Note: If a priority should be saved to all applications a student submits, choose to save it to Student. If it should be assigned per application, choose to save it to Application.

SchoolMint.

Configure an Automatic Priority

The rules engine is used to create priority eligibility rules that automatically set these priorities as eligible for students who meet the specified criteria. If the student data matches the rule, then the student is eligible for the priority.

Match ANY **ALL** of the following conditions

Lookup Field
student_annual.zip

Operator
IS

Expected Value
70506

Add Condition ▼   **Add Nested Group**

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Simple Lookup allows you to choose the Field Name, Operator, and Expected value. For example, the priority above is going to be assigned to any student where the Zip Code is 70506

SchoolMint

Oprah's Favorite Lottery Priorities: Siblings

This is a common lottery priority used by many of our organizations

Use our Sibling Condition for Siblings Attending, and/or Siblings Applying. Sibling Applying is assigned as long as the students have a submitted application under the same guardian account. Sibling Attending is assigned through the Sibling step on the application form

Sibling

Programs

Date Range

Add Condition

DEMO

Match ANY ALL of the following conditions

Student Sibling IS
Sibling Status: Currently Attending
Sibling School: Same School as the Program's School

OR

Student Sibling IS
Sibling Status: Applying To
Sibling School: Same School as the Program's School

Oprah's Favorite Lottery Priorities: Address

This is another common lottery priority used by many of our organizations

Use our Student Address Condition if you have boundary files on your platform. You can prioritize students inside and/or outside of specific district, or school zones. No boundary files? No worries! As long as you are collecting address data, you can create one for State, City, or Zip!

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Add Condition

Match **ANY** ALL of the following conditions

Student Address IS

Operator
INSIDE OF

Select Shape File
District Boundary

OR

Lookup Field
student_annual.zip

Operator
IS

Expected Value
70506

Add Condition

Add Nested Group

SchoolMint.

Oprah's Favorite Lottery Priorities: None!

Sometimes, you don't need a priority lottery. Here is what you can do:

You will want to ensure that the "priority" is something that can apply to ALL students. You can do this by creating a priority that applies to all applications that are marked as eligible. Students will then receive the "No Priority" priority on their eligible applications.

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Con...

Sibling

Programs

Date Range

Add Conditi...

Match [ANY] [ALL] of the following conditions

Lookup Field
application.status ▾

Operator
IS ▾

Expected Value
1

⊗

Add Condition ▾   Add Nested Group

SchoolMint®
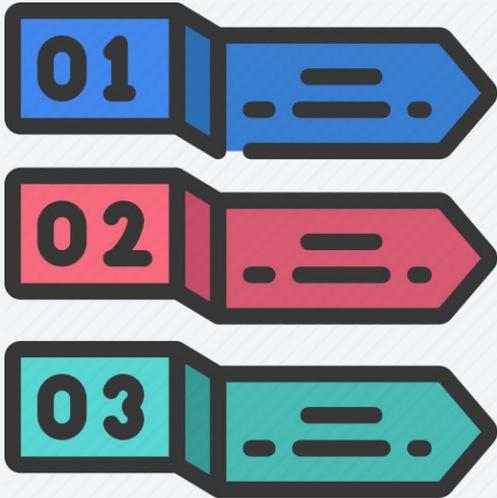
Lottery Designs

Lottery: Designs

Settings > Manage Lotteries > Lottery Designs

While the priority is used to give the student's application a higher chance of placement, the sub-lottery that the priority is assigned to, along with the rules (entries, weights, quotas, etc.) in the lottery design, will drive where the student is actually placed on the lottery list.

Lottery: Lottery Designs

Settings >> Manage Lotteries >> Lottery Designs

Choose a specific number of seats, or percentage of seats for that priority

Amount of "Entries" or "Weight" a priority is given

If Enabled: Will "sum" your Entries or Weights within the Sub Lottery

Add Multiple priorities for an AND function

Tiered (Entries) Lottery (i)   Weighted Lottery (i)

1

Sub-Lottery: 1

Select one or more priorities
Income Eligible (x)

Add a Priority Group

Entries
1

Add Quota

Guaranteed Placement   Make Entries Cumulative   Sort by Score

Add Multiple priorities for an OR function

If Enabled: Will overseat your cutoff number

For score based lotteries: Choose your scoring field and how your scores are sorted

SchoolMint.

I'll take Tiered vs. Weighted for 200, Alex!

Tiered:

Assigns an **Entries** amount for each priority included in a **sub-lottery**. An application whose **highest priority has more entries** than other applications **in that same sub-lottery** will have an **increased chance** of being placed above the others. Entries **do not guarantee a higher placement**, they just increase the chances of higher placement **within a sub-lottery**.

Weighted:

Assigns a **Weight** for each priority included in a **sub-lottery**. An application whose **highest priority has more weights** than other applications **in that same sub-lottery** will **always be placed above** other applications with a lower weight priority. Priority weight dictates the ordering of applications **within a sub-lottery**. Applications with **equal weight** priorities **within the same sub-lottery** will be **randomly ordered**.
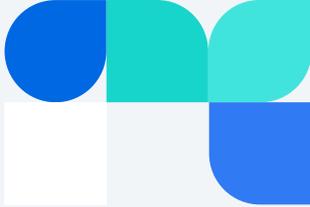
Let's Look At Some Examples

Tiered Lottery

Think of entries as tickets in the (sub-lottery 1) metaphorical hat.

The Employee Child application has 4 more chances than the Board Member's 1 chance, but the Employee Child application is not guaranteed to get placed above the Board Member application

During the lottery execution, the randomization within the sub-lottery could pull the Board Member's 1 entry/ticket out of the hat before getting to any of the 4 entries/tickets for the Employee Child

Tiered (Entries) Lottery ⓘ   Weighted Lottery ⓘ

1

Sub-Lottery: 1

Select one or more priorities
Board Member ✕   Entries
                                                        1
                                            Add Quota
OR
Select one or more priorities
Employee Child ✕   Entries
                                                        4
                                            Add Quota
Add a Priority Group

☐ Guaranteed Placement   ☐ Make Entries Cumulative   Sort by Score

Note: Entries can be cumulative!

Weighted Lottery

Weights will typically be placed in a highest weight to lowest weight order

The application with the Employee Child priority with a weight of 4 will always be ordered above applications with the Sibling Attending or Board Member priorities with weights of 1.

Applications with either the Sibling Attending or the Board Member priority in this sub-lottery will be randomly ordered against each other, but always after applications with the Employee child priority.

Note: Weights can be cumulative!

Cutoff Numbers

Lottery: Cutoff Numbers

Settings > Manage Lotteries > Lottery Cutoff Numbers

1. Filter for the Program
2. Enter in the number of seats available for each grade
3. Save

The input cutoff number will then be used in the lottery and when managing the waitlist.

CLICK HERE:
How to bulk import cutoff numbers

Lottery Cutoff Numbers

Tell us how many seats you would like to fill in the lottery.

Cancel

Save Cutoff Numbers

Export Cutoff Numbers

Program(s)
Birch ES Open Enrollment ⊗ ▼

School Level(s) ▼

Program Categorie(s) ▼

Apply Filters

Elementary School: Open Enrollment Programs

Birch ES Open Enrollment

Grade	Group	Cutoff Numbers	Current	Available
1	General Lottery	0	0	0
2	General Lottery	7	3	4

SchoolMint.

Lottery:
Lottery Settings

SchoolMint.
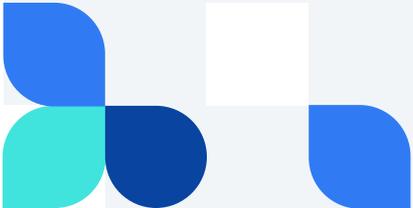
Global Settings: Is that your final answer?

Settings > Manage Lotteries > Lottery Settings (Global)

GLOBAL	BY FORM PROCESS (4)

Notifications

☑ Show lottery results on guardian dashboard

☑ Show waiting list number on guardian dashboard

Accept/Decline Placement

☑ Allow guardians to accept/decline seats from dashboard

Auto-Decline

☑ Auto-decline a student's other applications on Offered Lists once a seat is accepted

☑ Auto-decline **APPLICATIONS** if **OFFER** is not accepted by:

Days After Published Offer		Date *			Time of Day	
10	and/or	01/31/2025		at	10:00 AM	

If the "Days After Published Offer" extends past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

☑ Auto-decline **APPLICATIONS** if **REGISTRATION** is not submitted by:

Days After Accepting Seat		Date *			Time of Day	
10	and/or	01/31/2025		at	05:00 PM	

If the "Days After Accepting Seat" extend past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

These options affect auto-decline settings:

☑ Send a reminder email/text message to warn guardians before auto-decline

Days Before Auto-Decline *		Time of Day	
1	at	10:00 AM	

☑ Exclude weekends

Waiting List

☑ Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)

☑ Roll over waiting lists when the school year is rolled over

Post Lottery

☑ Auto-add eligible applications to lottery list after initial lottery is run

General

☑ Place Multiples Together
Same parent account & grade level required. Does not affect score-based lotteries.

☑ Same Address

☑ Twin Setting (same birthday ±1 day)

> Review each setting carefully to align with your desired lottery settings!

> Note: If you have auto-decline on execution, you will want to make sure to have auto-rollup on to fill your seats

Lottery:
Form Process Lottery Settings

Form Settings: Is that your final answer?

Settings > Manage Lotteries > Lottery Settings (By Form Process) > Select the form process you are updating

Waiting list:

☐ Auto-decline student's applications on waiting list when accepting a seat

BY FORM PROCESS (4)

For Multi-Choice Only

DEMO

Auto-Decline Settings for:

Select Form Process
Magnet Programs Application (1 of 4)

Auto-Decline on Lottery Execution: Magnet Programs Application

Offered list:

☑ Auto-decline student's applications on offered list ranked as **LOWER CHOICE** if offered higher ranked choice

Waiting list:

☑ Auto-decline student's applications on waiting list ranked as **LOWER CHOICE** if offered higher ranked choice

☑ Auto-decline student's applications on waiting list ranked as **HIGHER CHOICE** if offered lower ranked choice

For Ranked Choices Only: Review each setting carefully to align with your desired lottery settings!

Auto-Decline on Offer Acceptance: Magnet Programs Application

Waiting list:

☑ Auto-decline student's applications on waiting list ranked as **LOWER CHOICE** upon accepting seat into higher ranked choice
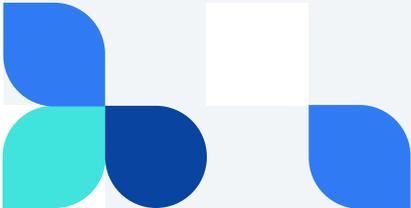
☑ Auto-decline student's applications on waiting list ranked as **HIGHER CHOICE** upon accepting seat into lower ranked choice

Note: If all are enabled, that is the same as your "single best choice"

SchoolMint.

Lottery:
Program Specific Lottery Settings

SchoolMint

Program Settings: Is that your final answer?

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

PROGRAM INFORMATION   PROGRAM ELIGIBILITY   APPLICATION SETTINGS   LOTTERY SETTINGS   SCHOOLFINDER

Manage parent results on their dashboard by program

Manage if and when auto-decline happens by program

Manage auto-rollup by program

Primary Settings

Lottery Design
Open Enrollment (Prioritized or Tiered Lottery)

Lottery Group Design
General Lottery

Accept/Decline Placement

☑ Allow guardians to accept/decline seats from dashboard

Auto-Decline Published Offer
☑ Auto-decline a student's other applications on Offered Lists once a seat is accepted ⓘ
◉ Global Lottery Settings   ○ Custom   ○ Off

Auto-Decline Accepted Seat

Waiting List
☑ Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)

Post Lottery
☑ Auto-add eligible applications to lottery list after initial lottery is run

Lottery Notifications to Guardians:

Accepted Placement Notification
ABC Elementary Lottery Offered Accepted

Declined Placement Notification
Lottery Placement Declined - Parent Notification

Offered Placement Notification
Lottery Results - Offered

Waiting List Notification
Lottery Results - Waiting List

☑ Show lottery results on guardian dashboard
☑ Show waiting list number on guardian dashboard

Lottery Notification to Admins:

Lottery Placement
test@admin.com,test2@admin.com

General

☑ Place Multiples Together
Turn off multiples together for this program only.

Tip: While you're here, double check the correct design and communications are connected!

Manage multiples by program

Manage adding post-lottery applications by program

Lottery Module:
Running your Lottery

SchoolMint.

Lottery: Running your Lottery

Lotteries Module > Run New Lottery

Lottery: Running your Lottery

Merge Waitlist

(Multiple Rounds only)

Run Lottery

Only applications submitted between these dates will be processed in the lottery.

Select Lottery Eligible Date Range ⓘ

Start Date & Time 📅

Central Time

Sorting
Random ▾

End Date & Time 📅

Central Time

Multiple Lotteries ⓘ

Merge Waitlist

☑ Merge new applications into existing priority groups

Save Waiting List

☑ Waiting lists will be saved after cutoff is reached

Save Waiting List

Generates a waiting list when offered seats have been filled

Sort Method

Random**:** Applications will be sorted according to the lottery design and the randomly generated lottery number will order them within their priority groups. (most common)
Date Submitted (No Priority Groups)**:** Applications will be ordered purely by submitted date (First come, first served)
Date Submitted (Within Priority Groups): Applications will be sorted according to the lottery design and the submitted date will order them within their priority groups/weights

Lottery: Running your Lottery

Select Programs & Grades

| Search Programs 🔍 | All School Levels ▼ | All Program Categories ▼ |

Select Programs	Select All
Elementary School	
Applewood Primary Collegiate	Select

>

Selected Programs
Elementary School
Magnolia Elementary Transformation ⊗

Select Grades

☑ All Grades

Placement Order ⓘ

Choose Grade Order

| Place students in lower grades first ▼ |

Cancel   **Run Lottery for Selected Programs**

1. Select **Programs**, **Grades** and grade **Placement order**
2. Click **Run Lottery for Selected Programs**
3. Confirm your settings and type **RUN LOTTERY**

SchoolMint.

Troubleshoot: Students Not Placed

In your Application module, under Quick Filters, you can use the Lottery List filter for **Not Placed**

Filter by Status

Show applications:

- ☑ Submitted
- ☐ Not Submitted

With Status:

- ☑ Eligible
- ☑ Ineligible
- ☑ In processing

Submission Date Range:

From	To

Withdrawn:

- ☐ Withdrawn
- ☑ Not Withdrawn

Lotteries:

Lottery List
Not Placed ⊗   Lottery Status

Common reasons an Application was not placed:

1. Submission date outside of the range used on lottery run
2. Application not set as eligible before lottery run
3. Grade/Program not included in the lottery run

SchoolMint.

Troubleshoot: Guardian Notifications

In your lottery list, you can determine if a guardian has been notified of their student's placement using a Saved View that includes their Notification Timestamps

Apply Saved View

Lottery Trackin...

Add View

Publish by Grade

timestamp_notified_offered	timestamp_notified	Actions
2023-12-06 10:55:53	2023-12-06 10:55:53	⋮
2023-12-06 10:55:53	2023-12-06 10:55:53	⋮
2023-12-06 10:55:53	2023-12-06 10:55:53	⋮
2024-01-03 10:18:05	2024-01-03 10:18:05	⋮
2024-01-03 10:18:05	2024-01-03 10:18:05	⋮
2024-01-03 10:18:06	2024-01-03 10:18:06	⋮

Published

No

Partially

Partially

Partially Published Lottery?

This means that there is a student on your lottery list who has not been notified yet! When you publish again, it will only notify those newly placed students, or students whose placements have changed and have not been notified!

Tip: Review your results thoroughly before publishing to ensure there results are accurate!

Troubleshoot: Student Placed On The Wrong List

Sometimes students applied to the wrong grade or program, and need to be moved

1. To remove the student's application from the incorrect lottery list, **Withdraw** the student application, and put the reason for withdrawal (applied to wrong grade/program, etc.)

2. **Update** the withdrawn student's grade, or whatever made them ineligible to be placed in the lottery, and ensure that their correct program is selected in the **Choice Selection step**

3. Go to the **Review and Send step**, and click Submit Application to **re-submit** the form with the change

4. In the **Application** module, if necessary, **update the submission date/time,** and update the application status ito **Eligible**
   a. If you have **Auto-Add** turned on, they will automatically be added to the lottery list and you can adjust their placement
   b. If you do not have **Auto-Add** turned on, you will need to run a merged lottery

Note: Be aware that if you have auto-rollup turned on, when you withdraw the form, a student will roll up into that available seat!

DEMO

SchoolMint.

Q&A

Q: Can you give another example of when you would use "make entries cumulative"?	A: Cumulative lotteries are used when you want your priorities within a sub lottery to be able to "stack" for students who meet more than one priority. In a tiered lottery, a student who has more than one priority (if entries are cumulative) receives more entries. In a weighted lottery, if they have more than one priority, they would receive a higher weight.
Q: Auto-decline if a student's other applications are on the waitlist do those also auto-decline?	A: This can be managed under Settings > Manage Lotteries > Lottery Settings > By Form Process
Q: Auto Decline applications if registration--is this functionality retroactive? Ex. a student has been sitting in accepted and not started regsitration can it auto-decline	A: The expiration date is set at the time of the lottery offer. So you can update the date/time but it will not apply retroactively, only to new offers
Q: Waitlists: For Auto-roll up applications from waitlists to offered list option is check, if an application moves off waitlist to offer list, applicant is also on other waitlists, once they accept the offer seat, will they be removed from the other waitlists?	A: This can be managed under Settings > Manage Lotteries > Lottery Settings > By Form Process

SchoolMint.

Q: What if we don't see under the programs all the Lottery Settings that you just shared?	A: If you don't see a Lottery Setting that is available in your Program Lottery Settings, it may be that it is not turned on in your Global Settings. If it is turned on in Global, you may want to check your Admin's Permissions
Q: What if you run multiple lotteries? Does Not placed lottery list update?	A: The expected behavior is that this updates.
Q: Will admins ever be able to manually place students without auto-add or running new lotteries?	A: This is on our roadmap of features we would love to add! If you would like to put in a feature request, check out our Community - our Product Team reviews this and other admins can upvote this request.
Q: Lotterry was ran, parent accepted, but register button is grayed out. how can resolve this?	A: This may be due to Registration Dates being closed. You can navigate to Settings > Date & Time > Click to Manage for Each School Level > Update Your Dates. You also have the ability to use School Specific Dates, so ensure that your dates are also open in your schools by going to Settings > Schools/Programs > Manage Schools > Edit > Registration Settings tab
Q: If a lottery is run and students are offered seats and another lottery is run, will the second run ever replace the seats from the first run?	A: The system will never be remove a student from an offered list automatically. The only time a student will be removed from an offered list is if an admin manually adjusts their placement within the lottery list, or their application is withdrawn

SchoolMint.

Lottery Session 3:
Managing Beyond the Lottery

- **Utilizing Lottery List Features**
- **Options for Late Applicants**
- **Common Lottery Report Columns and Filters**

February 22, 2024

Click Here to Register

SchoolMint

Admin Resources

Zendesk

Help Articles

Webinar Recordings and Slide Decks

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

SchoolMint®