



# SchoolMint Enroll Lottery Webinar Series

# Session 3:

## Managing Beyond the Lottery

# Meet the Hosts



**Alexis Robin**  
Sr. Professional Services Specialist  
Presenter



**Ian Cary**  
Customer Experience Manager  
Q&A



# Logistics

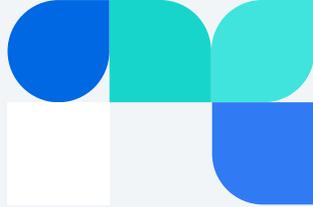


Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end:

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

Survey at the end



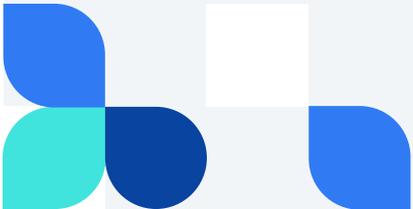
## Session 3 Goals

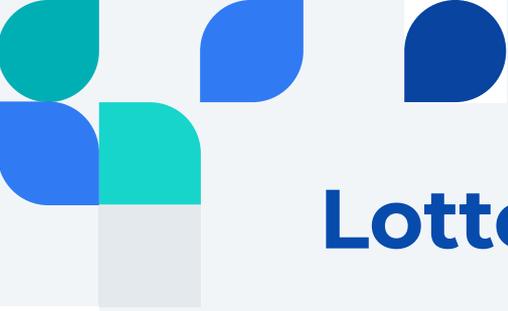
- Utilizing Lottery List Features
- Options for Late Applicants
- Common Lottery Report Columns and Filters





# Lottery Module



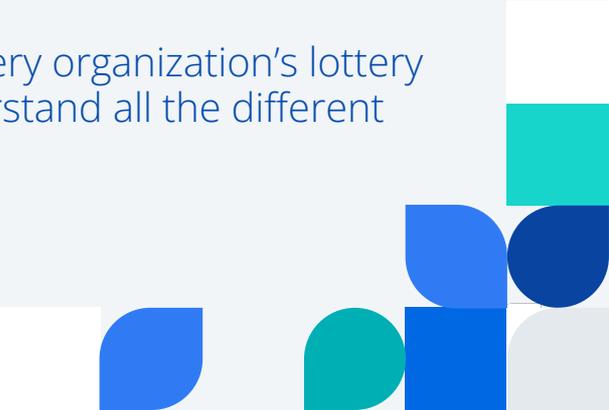


# Lottery Module in SchoolMint

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).

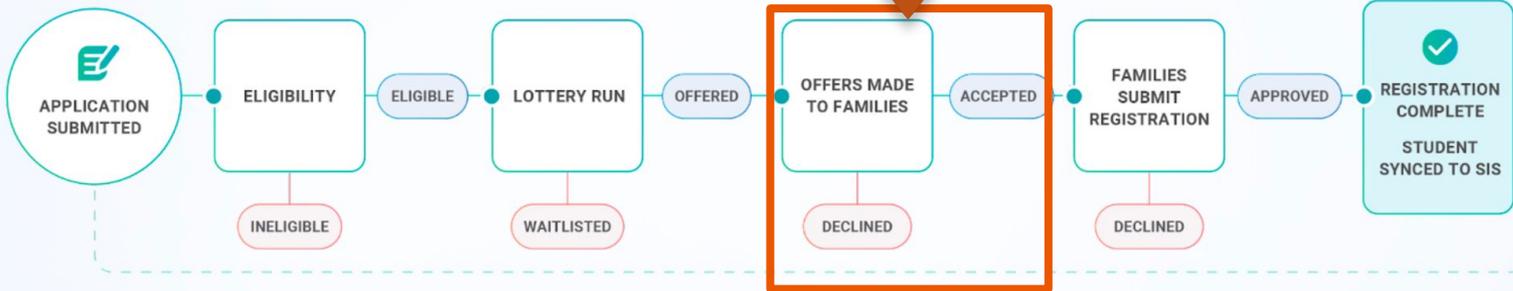
Lotteries will vary from very simple to very complicated. Every organization's lottery process can and will be different, so it's important to understand all the different ways a lottery can run and function.



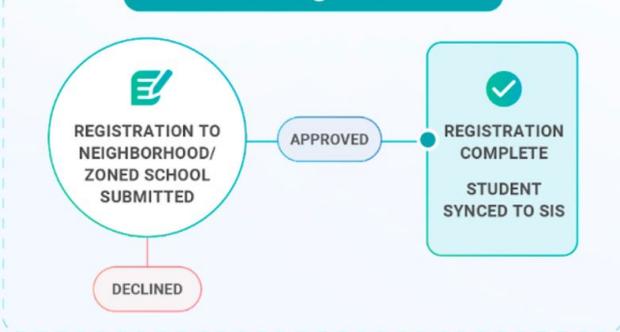
# SchoolMint Enroll | Enrollment Flow

## Application, Lottery and Registration

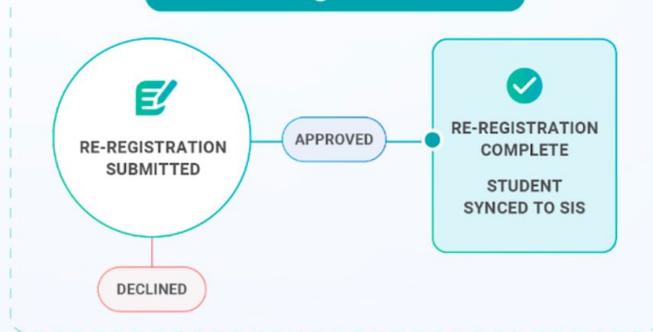
We are here



## Direct Registration



## Re-Registration





# Poll: Which aspect of managing lottery data do you find most challenging?

- A. Ensuring data accuracy
- B. Handling late applicants
- C. Generating reports
- D. Communicating results to stakeholders

# Lottery Dashboard



# Lottery Dashboard

This is where you can find your lottery lists, as well as manage them. Actions from here include: Bulk Publish Results, Bulk Export Results, filter for your lottery lists, access your lottery lists, and depending on your admin access, delete lottery lists



Lotteries

## Lottery Dashboard

Show Inactive

View real-time lottery runs for each program, showing offered lists and waiting lists.

Bulk Actions 3 / 3 Selected

Publish Lottery Results

Export Lottery Results

Program(s)

School Level(s)

Program Category(s)

	Program	Category	Pool <i>i</i>	User	Published	Actions	
0:09	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	3	Anthony Playmith	No	<a href="#">View</a>	
<input checked="" type="checkbox"/>	2024-01-29 11:24:20	Dogwood ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>
<input checked="" type="checkbox"/>	2024-01-29 10:46:38	Cedar ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>

# Show Inactive

If enabled, this will show previous rounds of your lottery lists, which you can then access to see what those lists looked like before the next round was run

## Lottery Dashboard

Show Inactive

View real-time lottery runs for each program, showing offered lists and waiting lists.

Bulk Actions

3 / 7 Selected

Program(s)

School Level(s)

Program Category(s)

<input checked="" type="checkbox"/>	Run Date	Program	Category	Pool <span>i</span>	User	Published	Actions
<input checked="" type="checkbox"/>	2024-02-08 13:50:09	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	3	Anthony Playmith	No	<a href="#">View</a>
<input type="checkbox"/>	2024-02-08 13:00:01	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Anthony Playmith	No	<a href="#">View</a>
<input type="checkbox"/>	2024-02-08 12:55:09	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Anthony Playmith	No	<a href="#">View</a>
<input checked="" type="checkbox"/>	2024-01-29 11:24:20	Dogwood ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>
<input type="checkbox"/>	2024-01-29 11:23:17	Dogwood ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Alexis Robin	No	<a href="#">View</a>
<input checked="" type="checkbox"/>	2024-01-29 10:46:38	Cedar ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>
<input type="checkbox"/>	2024-01-29 10:45:07	Cedar ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Alexis Robin	No	<a href="#">View</a>

# Lottery List Management



# Lottery List Actions

This is where you can manage your individual lottery lists. Actions from here include: Publish Results or Publish by Grade, View the Settings used on run, and Export Results. We can also see details of our placed students, and available seats

Lotteries & Placements: **2023-2024**

[Lottery Dashboard](#) [View Settings](#) [Export Lists](#)

## Birch ES Open Enrollment

Lottery Design: [Weighted Lottery](#)

Filter by Lottery Lists  Filter by Grade Levels  Apply Saved View  [Add View](#)

Grade: **1**

### General Lottery

OFFERED LIST [0 Assigned, 0 Seat\(s\) Available](#)

No applications on Offered List

WAITING LIST [1 Waitlisted](#)

[Publish Lottery Run](#)

[Publish by Grade](#)

[Bulk Offer](#)

Rank	ID#	Student Name	Status	Sub-Lottery	Weight	Score	Actions
1	7195652	<a href="#">Marquez, Dora</a>		2	1	-	<a href="#">⋮</a>

# Assigned Seats vs. Available Seats

## Assigned Seats

The number of seats that have been offered.

## Available Seats

The total number of seats available on the offered list according to the cutoff numbers.

$$\text{Cutoff Number} - \text{Assigned Seats} = \text{Available Seats}$$

## General Lottery

OFFERED LIST

*4 Assigned, 0 Seat(s) Available*

Rank	ID#
1	 2531504

**Note:** The *assigned seats* number can be *less than or more than* the *available seats* because there may be fewer applicants than seats available OR admins have the ability to oversee the offered list as needed.

# Bulk Offer

Use the Bulk Offer button to select the number of applications to be moved to the Offered List from the Waiting List

## General Lottery

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

Rank	ID#	Student Name	Expiration Date
1	 2709317	<a href="#">Barton, Paul</a>	
1	2551341	<a href="#">Robin, Angelle</a>	

### Notify Guardians

Administrators managing lottery list placements are able to choose to notify a guardian when moving a student to the offered list

### Overseat an Offered List

If you select more seats to offer than seats are available, there will be a warning that pops up to indicate before making offers.

## Make Offer(s)

How many applications would you like to move from the waiting list to the offered list?

1

*2 seat(s) filled, 2 seat(s) available*  
Notes / Reason (not visible to guardian(s)) \*

This is an example

Notify guardian(s) of offer(s)

Cancel

Make Offer(s)

Publish by Grade

Bulk Offer

# Adjust Placement

Admins have the ability to move the student to a different lottery list, change where they fall on the waiting list, as well as update the offered status. Any changes made to the applicant's placement requires a Note/Reason to be input.

## General Lottery

OFFERED LIST *1 Assigned, 6 Seat(s) Available*

Rank	ID#	Stu
1	2608710	Benn
	2531507	W

### Notify Guardians

Administrators managing lottery list placement adjustments are able to choose to notify a guardian when updating the status

## Adjust Application Placement

East, Jane	Birthdate: 02/03/2014	Grade: 2	Guardian(s) 1252924: May East 1239563: Maria Riché
------------	--------------------------	-------------	--

Current Position: Offered

Update Placement Status  
Select Status \*  
Accepted

Notify guardian(s)  
This notification uses a Lottery Status Change communication template determined by the selected status.

Move Jane on to the offered list  
 Move Jane to [dropdown] on the waiting list

Notes / Reason \*

Cancel Save Placement

Grade Published

Weight	Score	Actions
1	-	
1		

- Adjust Placement
- View Placement History
- View Application

# Reviewing Change Logs

Change logs for lotteries (Application Placement History) will keep track of movements that completely change the order of the lottery list from the original ranking. For example, if a student is moved from the waiting list to the offered list, then that would be logged. The action taken by a guardian to accept/decline a placement is also found in the Application Placement History. However, if a student is moved from #5 to #4 on the waiting list due to auto-rollup movements, that action would not be logged.

## General Lottery

OFFERED LIST *1 Assigned, 6 Seat(s) Available*

Grade Published

Rank	ID#	Student Name	Expiration Date	Status	Sub-Lottery	Weight	Score	Actions
1	2608710	Bennett, Emmalise			3	1	-	
	2531507					1	-	

### Application Placement History

**West, Katie** Birthdate: 02/03/2014 Grade: 2 Guardian(s): 1252941: Wanda West

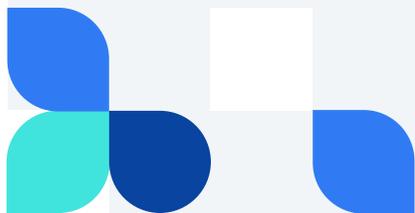
**Program:**  
Birch ES Open Enrollment

Date	User & IP	Movement	Reason
12/06/2023 11:00:47 AM	Wanda West 24.125.219.244	Katie West was moved from Pending to Declined	

- Adjust Placement
- View Placement History
- View Application



# Lottery Dashboard & List



# Filtering the Lottery List

Lottery lists can be filtered using the dynamic views functionality. Dynamic views allow admins to filter for specific criteria as well as create custom views that can be used to add or remove columns to the lottery list.

Product Learning Enablement | Lotteries & Placements: 2023-2024

insights ✓ Caitlin Mayer 2023-2024

## Lotteries & Placements: 2023-2024

Lottery Dashboard View Settings Export Lists

### STEM

View lottery runs, adjust placements, manage waiting and view placement history. [Publish Lottery Run](#)

Filter by Lottery Lists Filter by Grade Levels Apply Saved View Standard View Add View

#### Grade: 4

#### General Lottery

OFFERED LIST 2 Assigned, 2 Seat(s) Available [Grade Published](#)

Rank	ID#	Student Name	Status	Sub-Lottery	Weight	Score	Priority	Actions
1	6659091	Andrew Robin		3	1	-	No Priority	
2	3670214	Alexis Robin		3	1	-	No Priority	

WAITING LIST 0 Waitlisted  
No applications on Waiting List

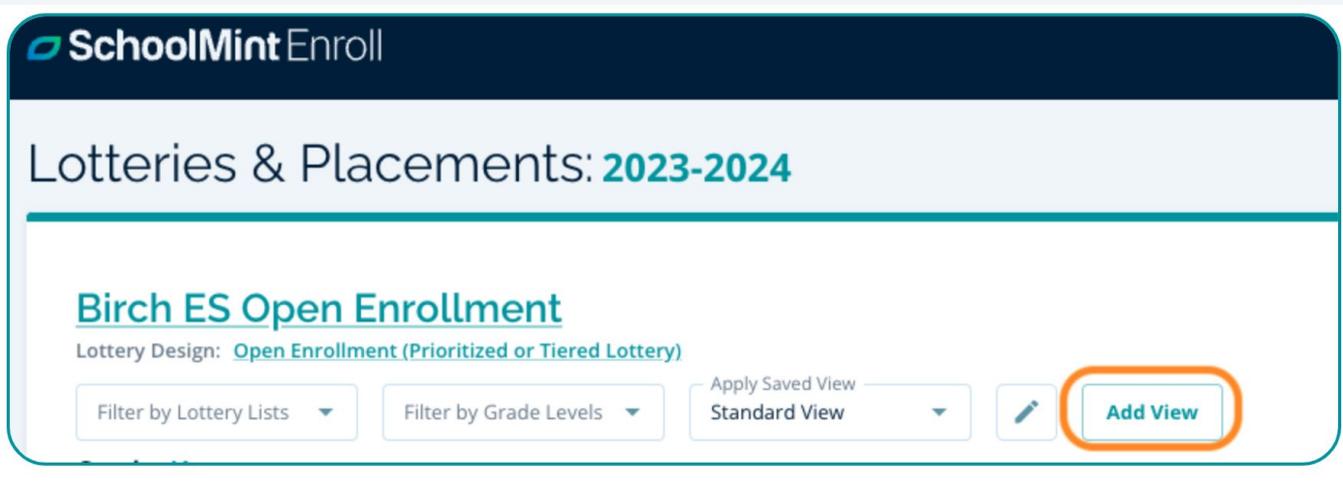
#### Grade: 5

OFFERED LIST 0 Assigned, 0 Seat(s) Available

... Need Help?

## Creating Saved Views

The Saved View functionality on the Lottery & Placements page is especially useful for displaying critical lottery information to assist with tracking acceptances, declines, expiration deadlines, manual movements, etc.



**SchoolMint Enroll**

### Lotteries & Placements: 2023-2024

#### Birch ES Open Enrollment

Lottery Design: [Open Enrollment \(Prioritized or Tiered Lottery\)](#)

Filter by Lottery Lists ▼    Filter by Grade Levels ▼    Apply Saved View: Standard View ▼    **Add View**

# Creating Saved Views

1. Name the view and decide if it should be available Globally to all admins or only accessible to you.
2. A default set of fields will display as a starting place for you to re-order (drag and drop) or remove.
3. Click the `Add Column` button and use the Rules Engine to select the Table (Record), Field, and Label for your column.

**General Information:**

Name this View\*  
Untitled View

**Access Settings**

Private View (only accessible to you)

Globally Available to All Users

**Customize Columns:**

Add Columns

Order	Column Label	Field	Actions
≡	Rank	rank_adjusted	 
≡	ID#	id	 

## Use These Columns In Your Saved Views!

Record	Label Displayed	Field Name	Note
Lottery Ranking	Timestamp Offered	timestamp_notified_offered	Date/time when Offer was published to family
Lottery Ranking	Timestamp Initial Notification	timestamp_notified	A helpful column for your Waiting List Date/time when family notified of initial lottery result
Lottery Ranking	Accepted/Declined By	accepted_declined_by	Who accepted/declined the offer: <ul style="list-style-type: none"><li>• A=Admin</li><li>• P=Parent</li><li>• S=System</li></ul>
Lottery Ranking	Manual/Admin Placement	manual_indicator	1=Placed Manually by Admin 0=System Placement (based on lottery settings enabled)

**Click Here:**

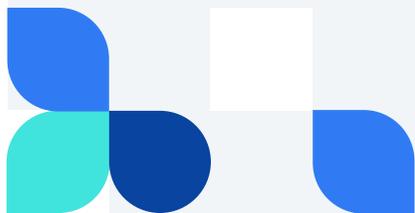
Create This Saved View for Lottery

**Click Here:**

Data Dictionary



# Create Saved Views



# Managing Post Lottery Placements

## Updating Cutoff Numbers

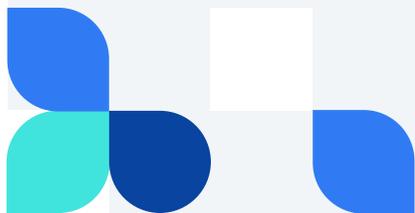
Lottery cutoff numbers may need to be updated after running the initial lottery due to changes in seats available in a class/program/school. **It is not possible to update the cutoff number in the lottery list by simply updating and saving the cutoff numbers in the settings.** A new lottery pool must be run in order to trigger the lottery list to use that new cutoff number.

**CLICK HERE:**

Updating Lottery Cutoff Numbers



# Update Cutoff Numbers



## Adding Students to the Lottery List

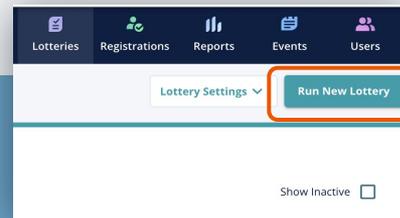
When students submit applications after the lottery window, there are two options to add these applications to the lottery list:

### Option One:

Have "Auto-add eligible applications" setting enabled. This will add applications to the lottery list automatically without having to run a new lottery pool.

### Option Two:

Run a new lottery pool. This take the existing lottery list and add any newly eligible students to the list according to the settings enabled and selected.



#### Post Lottery

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

# Merge vs. No Merge for Additional Lottery Pools

If you are an organization that runs multiple lottery rounds, you will have the option to either merge your additional lottery round, or not merge your additional lottery round

The screenshot shows the 'Run Lottery' interface. On the left, there is a section titled 'Select Lottery Eligible Date Range' with an information icon. It contains two date pickers: 'Start Date & Time' and 'End Date & Time', both set to 'Central Time'. Below these are 'Sorting' and 'Random' options. On the right, there is a section titled 'Multiple Lotteries' with an information icon. It contains a 'Merge Waitlist' section with a checked checkbox and the text 'Merge new applications into existing priority groups'. Below this is a 'Save Waiting List' section with the text '... lists will be saved after cutoff is reached'.

## Merged Lottery:

If checked, merges applications to the end of their priority group (applies to waitlist placements only).

App 1 - Round 1 Priority 1  
App 2 - Round 1 Priority 1  
App 3 - Round 2 Priority 1  
App 4 - Round 1 Priority 2  
App 5 - Round 2 Priority 2

## Not Merged Lottery:

If not checked, students are added in priority order after the first round.

App 1 - Round 1 Priority 1  
App 2 - Round 1 Priority 1  
App 3 - Round 1 Priority 2  
App 4 - Round 2 Priority 1  
App 5 - Round 2 Priority 2

## Reissuing an Auto-Declined (Expired) Offer

### Scenario One:

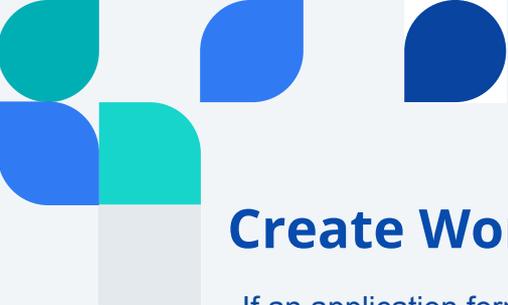
The deadline passed and placement is auto-declined. The family requests you accept the offer on their behalf.

### Scenario Two:

The offer deadline has passed and the family contacts you to extend the deadline for an auto-declined offer.

**CLICK HERE:**

Reissue Auto-Declined Offers



## Create Workflow Notifications for Withdrawn Forms

If an application form is withdrawn, the student will be removed from the lottery list for the program the application was submitted for. Creating a workflow notification can prevent guess work and notify administrators when an application form has been withdrawn!

**CLICK HERE:**  
Create Workflow Notifications



# Lottery Reports



# Historical Lottery Data Report

Record	Label Displayed	Field Name	Note
Lottery Ranking	Rank Original	rank_original	What number order was the application initially placed at on the lottery list
Lottery Ranking	Original Sub-lottery	sublottery_original	What was the sub-lottery the application was initially placed on the lottery list
Lottery Ranking	Original Weight	weight_original	What was the weight of the application when it was initially placed on the lottery list

# Offered or Waiting List Report

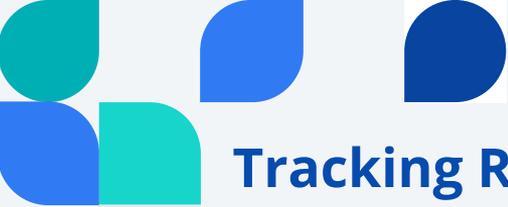
Record	Label Displayed	Field Name	Note
Lottery Ranking	Lottery List	lottery_list	What list the applicant is placed on: <ul style="list-style-type: none"><li>• offered</li><li>• waiting</li></ul>
Lottery Ranking	Lottery Status	status	What is the applicant's status on their lottery list: <ul style="list-style-type: none"><li>• 1=Accepted</li><li>• 0=Declined</li><li>• -1=Pending</li></ul>
Program	Program Name	title	The name of the program the student is placed in <ul style="list-style-type: none"><li>• You will need to have an Application field in the report to see this option</li></ul>

# Auto-Denial Reports

Record	Label Displayed	Field Name	Note
Lottery Ranking	Auto-Denial Expiration Timestamp	timestamp_expire	The date and time that an auto-denial is set to occur once the offer has not been accepted
Lottery Ranking	Registration Auto-Denial Expiration Timestamp	reg_timestamp_expire	The date and time that an auto-denial is set to occur once the accepted offer has not submitted a registration
Lottery Ranking	Timestamp Notified of Placement	timestamp_notified	Date/time when family notified of initial lottery result
Lottery Ranking	Timestamp Notified of Offer	timestamp_notified_offered	Date/time when Offer was published to family
Lottery Ranking	Accepted/Declined By	accepted_declined_by	Who accepted/declined the offer: <ul style="list-style-type: none"><li>• A=Admin</li><li>• P=Parent</li><li>• S=System</li></ul>

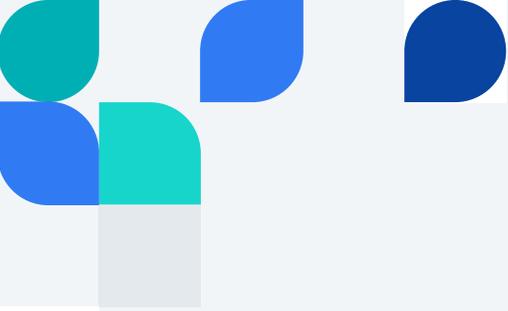
# Choice Ranking Lottery Reports

Record	Label Displayed	Field Name.	Note
Lottery Ranking	Lottery List	lottery_list	What list the applicant is placed on: <ul style="list-style-type: none"><li>• offered</li><li>• waiting</li></ul>
Application	Choice Rank	choice_rank	The ranked order the applicant placed their applied to program in. The number of the rank is equal to the value. For example: <ul style="list-style-type: none"><li>• 1=Choice 1</li><li>• 2=Choice 2</li></ul> and etc.
Program	Program Name	title	The name of the program the student is placed in <ul style="list-style-type: none"><li>• You will need to have an Application field in the report to see this option</li></ul>



# Tracking Registration Completion Reports

Record	Label Displayed	Field Name	Note
Registration	Submitted	submitted	Indicates if the applicant submitted their registration: <ul style="list-style-type: none"> <li>• 1=Submitted</li> <li>• 0=Not Submitted</li> </ul>
Registration	Maximum Step Completed	maxstep	Maximum step reached in enrollment process
Lottery Ranking	Accepted	accepted	Indicates if the applicant submitted their registration: <ul style="list-style-type: none"> <li>• 1=Accepted</li> <li>• 0=Declined</li> </ul>
Lottery Ranking	Timestamp Notified of Offer	timestamp_notified_offered	Date/time when Offer was published to family
Lottery Ranking	Accepted/Declined By	accepted_declined_by	Who accepted/declined the offer: <ul style="list-style-type: none"> <li>• A=Admin</li> <li>• P=Parent</li> <li>• S=System</li> </ul>



**Click Here:**  
Reports Webinar

**Click Here:**  
Data Dictionary



# Q&A

## Survey



# Q&A

**Q: Can you removed students that declined their seats?**

A: You can only remove students from the lottery list by withdrawing their Application. However, once a student's seat is declined, there is no further action needed on the guardian or administrator's part, and the declined seat can be filled with the next available student either through automatic or manual movements.

**Q: If you have auto decline after x number of days. When a new student is added will it give them the 7 days as long as the date is extended further out**

A: Yes! The auto-decline is always going to go off of the earliest passed date - so if the final deadline is passed the 7 days, then auto-decline happens after the 7 days.

**Q: What does it mean by weight? As in priorities?**

A: You are not able to merge parent accounts, but you can deactivate their access by going to Users > Guardian Accounts > Disable Allow GUARDIAN Access > Save  
Deactivated users can also be found and managed under Users > Deactivated Accounts"

**Q: Can we delete or merge parent accounts if multiple accounts are created?**

A: This can be managed under Settings > Manage Lotteries > Lottery Settings > By Form Process

# Q&A

**Q: Under the Published column on my lottery dashboard, I have it listed as “partially” published. What does this mean?**

A: Partially Published lotteries have new applications on the lottery list that have not yet been notified. Publishing or Re-publishing that list will notify the families that have not yet been notified.

**Q: Is there a premade workflow notification for admin for offers declined?**

A: We can actually manage admin notifications for *Offered Accepted + Declined students in Settings > Schools/Programs > Manage Programs > Edit > Lottery Settings*  
Add admin email (of multiple emails separated by a comma) in the Lottery Notification to Admins area  
You also have the ability to create custom workflow notifications outside of the premade ones!

**Q: Can we add other options to withdraw application besides choosing Withdraw to be able to edit the app if the family changes their mind? (ex., no response, enrolled elsewhere)**

A: Before lottery, if the application is marked as ineligible, it won't be included, and an admin can add a note to the application for why they marked the student as ineligible. If the student has been placed on the lottery, an admin can decline the lottery seat, and note the reason for declining in that process.

**Q: Is pulling a report the only way to monitor how far a parent has gotten in the registration process?**

A: You will want to report on “maxstep” to see how far families have gotten in the registration form. You can also filter for Unsubmitted registrations on the Registration module, and add a Saved View that has a column showing the “maxstep” field!

# Q&A

**Q: Will running the lottery open the registration forms? Once a student accepts their offer will it allow them to complete their registration forms?**

A: "No, in order to open the registration forms, your dates must be set under Settings > Date & Time > Registration Dates  
If dates are open when offers are released, then students will be prompted to start their registration as soon as they accept!"

# Registration Countdown

## Preparing to Open Online Registration

- Testing forms effectively
- School settings and eligibility rule considerations
- Implementing Effective Communication Strategies

March 7, 2024

[Click Here to Register](#)

**Zendesk**

**Help Articles**

**Webinar Calendar and Resources**

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

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

**THANK YOU!**

