



SchoolMint Enroll

**Registration Countdown: Preparing
to Open Online Registrations**



Meet the Hosts



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Presenter



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Q&A



Logistics

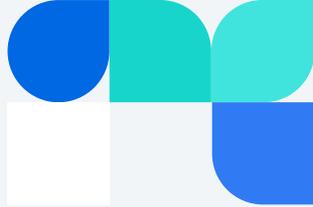


Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end:

- Ask webinar related questions throughout by clicking **Q&A**
- Send site-specific questions to schoolmint.zendesk.com

Survey at the end



Today's Goals

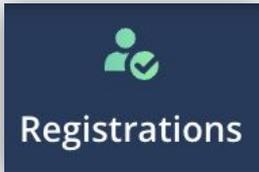
- Testing forms effectively
- School settings and eligibility rule considerations
- Implementing Effective Communication Strategies



Registration Module: The Basics



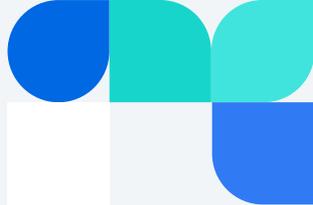
Registration Module in SchoolMint



The Registration module in Enroll is built to handle both new students registering for your school (new registrations) and students who are re-enrolling to your school (re-registrations).

A school's registration and re-registration form are shared, and attached in the school's settings. This is because the school is where the student will physically attend. While Registration and Re-Registrations share the same form process at a school, the form can be edited to show certain steps for New vs Returning students, or both.

New Registration



What is a NEW Registration?

In Enroll, new registration students are students that need to register within a school that they have not attended in the previous year. This school is most often going to be their zoned district school or a school that they have applied to and received a lottery placement on the accepted list.

How do I determine what students are "new" students?

The Enroll platform uses the field "student_annual.type" to know if a student is a NEW student or RETURNING student. If a student has "New" selected in their student profile, they are a new student and would fill out a registration form for a new school.

Profile

Information Form

Applications

Registration

Notes

Student Profile

Student ID: 5866778

First Name: Andrew Middle Name: Last Name: Aardvark

SIS Student ID: 2022-2023 School: Elm High School

Birthdate: 07/06/2007

Student Type: New

2022-2023 Grade: 9 2023-2024 Grade: 10

How does a student know where to Register?

In most cases, a student registering as a NEW student will be registering to a school that they have accepted a seat at through the typical application/lottery process. If a student accepts an offered seat and the registration dates are open, they will see the registration form and will have the ability to register where they have accepted a seat.

There are other cases where a student will have the ability to directly register to attend a school. Most often this will be a school (sometimes multiple schools) that they are zoned to attend.

Congratulations!

Offer has been accepted. Welcome to Birch Daycare. Registration is now open, click below to continue.

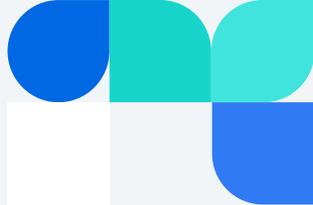
[Register Later](#) [Register Now](#)

Paul Barton

✓ 3 Applications Submitted [View Submitted Forms](#)

[Register to Birch Daycare](#) [Start](#)

Re-Registration



What is a RE-Registration?

Re-registration refers to when a student is eligible to register in a school that they are already attending. For most use cases, this means that students just need to submit forms for the school that they have indicated they are already attending.

How do I determine what students are re-registering students?

The Enroll platform uses the field "student_annual.type" to know if a student is a NEW student or RETURNING student. If a student has "Returning" selected in their student profile, and/or they have an SIS ID, they are a returning student and would fill out a re-registration form for the school they are already attending.

Profile

Information Form

Applications

Registration

Notes

Additional Info

Student Profile

Student ID: 2444029

First Name: Itt Middle Name: Last Name: Addams

SIS Student ID: 10030

2022-2023 School: Dogwood Elementary School

Birthdate: 10/31/2014

Student Type: Returning

2022-2023 Grade: 3 2023-2024 Grade: 4

(for 2023-2024 school year)

How does a student know where to Re-Register?

Typically, when a student is re-registering, they will be registering to the school that is set in the `school_previous_id` field. This field is most often set in one of two ways: 1) through an SIS import or 2) in the Student Information form.

Once this field is set, the student will be able to see the option to re-register to the specific school indicated in that field.

Re-Register at Your Current School

Dogwood Elementary School

Address: 235 Doucet Road, Lafayette
Grades: K to 5

Re-
Register

Profile	Student Profile
Information Form	Student ID: 2444029
Applications	First Name <input type="text" value="Itt"/> Middle Name <input type="text"/> Last Name <input type="text" value="Addams"/>
Registration	SIS Student ID <input type="text" value="10030"/> <input type="text" value="2022-2023 School Dogwood Elementary School"/>
Notes	Birthdate <input type="text" value="10/31/2014"/> <input type="text" value="2022-2023 Grade 3"/> <input type="text" value="2023-2024 Grade 4"/>
Additional Info	Student Type <input type="text" value="Returning"/> <small>(for 2023-2024 school year)</small>



Poll: Which emoji best represents your feelings about online registration this year?

- A. 🚀 Excited to streamline the process!
 - B. 😬 Nervous but ready to tackle the challenge!
 - C. 🎉 Thrilled for the new possibilities!
 - D. 🤔 Curious about how it will all unfold!
- 

Setting up Registration

In order for Registrations/re-Registrations to be submitted, the following must be set:

- ❑ The Form needs to be connected to the school
- ❑ Registration calendar dates need to be open
- ❑ Each school has been reviewed and set up
- ❑ New Students: Registration rule needs to be reviewed and assigned at the School
- ❑ Returning Students: Re-Registration rule needs to be reviewed and assigned at the School Group

Eligibility Rules



Configure an Eligibility Rule

The rules engine is used to create eligibility rules that allow students to access a form process as long as they meet the specified criteria.

Settings > Custom Data > Eligibility Rules/Restrictions

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Student is eligible if **ANY** **ALL** of the conditions below are met

Lookup Field student.id	Operator IS	Expected Value 0	
----------------------------	----------------	---------------------	---

Add Condition  **Add Nested Group**

You can use the “Add Condition” option to utilize pre-configured rules. “Simple Lookup” allows you to configure your own rules.

Common Registration Rule: Offered + Accepted Lottery Placement

Only students in Accepted status on the offered list for your lottery may register at the school that has this rule assigned.

Student is eligible if **ANY** **ALL** of the conditions below are met

Lookup Field student.id	Operator IS	Expected Value 0	<input type="button" value="x"/>
----------------------------	----------------	---------------------	----------------------------------

This scenario works because the platform looks at the registration rules AND whether a student has an accepted seat. Since no student will have an ID of 0, the platform will then automatically look to see if a student has accepted a lottery offer.

Common Registration Rule:

Register in Zoned School / Neighborhood School

Only students residing within the specified boundary(s) may register at the school that has this rule assigned.

Student is eligible if **ANY** **ALL** of the conditions below are met

Student Address IS INSIDE OF

- Simple Lookup
- Field Comparison
- Student Address**
- Grades
- Student In Current School
- Student Continues Feeder Path
- Sibling
- Programs
- Date Range

Note: Ensure the boundary is connected to the school!

Common Re-Registration Rule:

Students may only re-register in the school that is set as their current school

Student is eligible if **ANY** **ALL** of the conditions below are met

Student School Operator **Same School**

- Simple Lookup
- Field Comparison
- Student Address
- Grades
- Student In Current School**
- Student Continues Feeder Path
- Sibling
- Programs
- Date Range

Common Re-Registration Rule:

Students may only re-register in the school that is set as their current school, AND they have an SIS ID and/or are considered “Returning”

Student is eligible if **ANY** **ALL** of the conditions below are met

Student School IS ✕

AND

Student is eligible if **ANY** **ALL** of the conditions below are met 🗑️

Lookup Field HAS VALUE ✕

OR

Lookup Field IS Returning ✕

[Add Condition](#) [Add Nested Group](#)

Reviewing Your Settings



School Settings

Settings > Schools/Programs > Manage Schools > Primary

- If using Sync Service, ensure the correct Connection is set
- Ensure your school's address is correct

Birch Daycare: Edit Cancel Save School

PRIMARY SCHOOL ELIGIBILITY REGISTRATION SETTINGS FEEDER SCHOOLS

School Name *
Birch Daycare

School Group *
Oak School District

School Code *
E01

School Level *
Early Childhood Education

Abbreviation

Sync Connection
PowerSchool API

Address *
214 Jefferson Street

Address 2

City *
Lafayette

State *
LA

Zip Code *
70501

School Settings

Settings > Schools/Programs > Manage Schools > School Eligibility

- Make sure your Eligibility rule is connected
- If using boundaries/zones, ensure that they are connected here
- If applicable, ensure that relevant grades for the boundaries are also selected

Birch Daycare: Edit Cancel Save School

PRIMARY **SCHOOL ELIGIBILITY** **REGISTRATION SETTINGS** **FEEDER SCHOOLS**

Eligibility Rule/Restriction
Registration Rule

Boundary Settings
Boundary file changes may update student zones.

Select Shape File
Dogwood ES

Boundary Name	Relevant Grades	Edit
Dogwood ES	All	

School Settings

Settings > Schools/Programs > Manage Schools > Registration Settings

- Grades have been enabled
- School's Dates are correct
- Registration Form is attached
- Show Registration status to Guardians (optional)
- Correct Registration Confirmation Email has been set
- Correct Re-Registration Confirmation Email has been set

PRIMARY SCHOOL ELIGIBILITY **REGISTRATION SETTINGS** FEEDER SCHOOLS

Registration Grades:

<input checked="" type="checkbox"/> Infant Toddler	<input checked="" type="checkbox"/> PreK	<input type="checkbox"/> K	<input type="checkbox"/> 1
<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9
<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	

Registration Dates:

System Default School Specific

Re-Registration Dates:

System Default School Specific

Registration Settings:

Registration Forms
Registration / Re-registration

Show eligibility status on guardian dashboard

Notifications to Guardians:

Registration Complete Email
Registration Complete

Re-Registration Complete Email
Re-Registration Complete

School Settings

Settings > Schools/Programs > Manage Schools > Feeder Schools

- Optional: If your organization has feeder schools, ensure they are connected here

The screenshot shows the 'FEEDER SCHOOLS' tab in the School Settings interface. At the top, there are navigation tabs: PRIMARY, SCHOOL ELIGIBILITY, REGISTRATION SETTINGS, and FEEDER SCHOOLS. Below the tabs, the text reads: 'Select other schools that feed into this school: These can be used to determine Re-Registration schools based on a student's Current School. Boundary file changes may update student zones.' There is a search bar labeled 'Search schools' with a magnifying glass icon. Below the search bar is a list of schools to select from, with a 'Select Schools' header and a right-pointing arrow. The list includes 'Elementary School', 'Birch Elementary School' (with a green checkmark), and 'Cedar Elementary School' (with a 'Select' button). To the right of this list is a 'Selected Feeder Schools' box, outlined in orange, which contains 'Elementary School' and 'Birch Elementary School' (with a close 'x' icon).

Note: Select the school(s) that feed into the school you're editing. Ex: If you're editing the middle school settings, you'd select the elementary school(s) that feeds into the middle school

Group Settings

Settings > Schools/Programs > Manage School Groups

- Ensure the correct district boundary is connected
- Ensure the correct Re-Registration rule is connected

Oak School District: [Edit](#)

Cancel

Save Group

Group Information

Group Name *

Oak School District

Group Code *

1

Boundary Settings

Select Shape File

Lafayette Test Boundary

Re-Registration Rule

Select Re-Registration Rule

Re-register in Current School

Date Settings

Settings > Date & Time > Click to Manage for Each School Level

- Ensure the correct registration dates are set
- Ensure the correct re-registration dates are set

School Levels

[Add New Level](#)

Add, edit, and delete school levels.

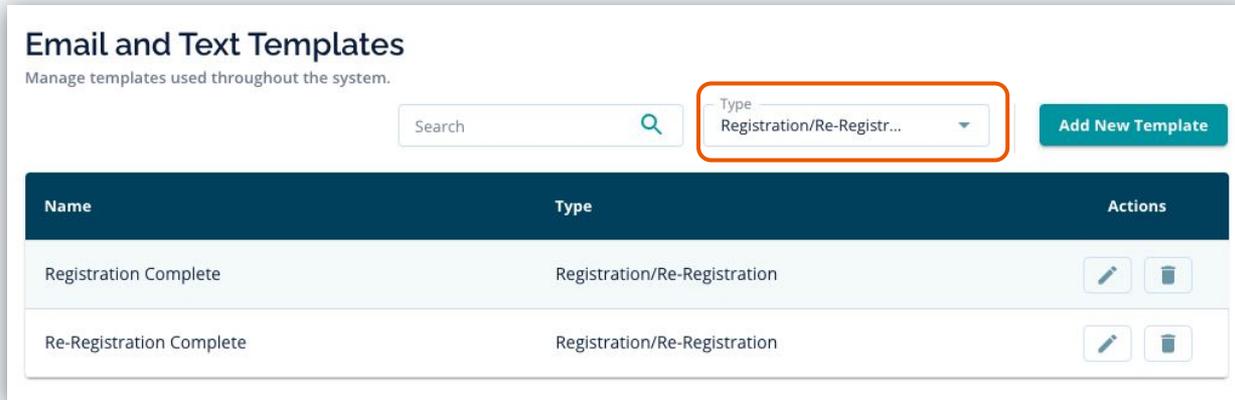
Level Name	Grades		Registration Dates		Re-Registration Dates	Actions
Elementary School	K - 5	●	09/01/2023 05:26 PM - 03/29/2024 05:26 PM	●	10/14/2022 06:00 AM - 12/31/2024 11:59 AM	 
Middle School	6 - 8	●	01/01/2022 12:00 AM - 01/01/2025 12:00 PM	●	10/14/2022 06:00 AM - 10/01/2024 11:59 PM	 
High School	9 - 12	●	12/01/2022 12:00 PM - 12/01/2024 12:00 PM	●	10/14/2022 06:00 AM - 12/01/2024 12:00 PM	 
Early Childhood Education	Infant Toddler - PreK	●	12/01/2022 12:00 AM - 12/01/2024 12:00 PM	●	12/01/2022 12:00 AM - 12/01/2024 12:00 PM	 

Registration/Re-Registration Communications

Update text and email templates

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

- Use the Type filter to find your Registration/Re-Registration emails
- Click Edit  for each template and read through to see if there are any adjustments needed



Email and Text Templates
Manage templates used throughout the system.

Search 

Type
Registration/Re-Registr...

Add New Template

Name	Type	Actions
Registration Complete	Registration/Re-Registration	 
Re-Registration Complete	Registration/Re-Registration	 

Note: There has been a recent change to the character limit for Text Messages to **123 characters**. Ensure that your texts don't exceed this new limit!

Create Custom Notifications for Each School!

For Organizations with more than 1 school, you can create school-specific Registration and Re-Registration complete emails!

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

Step One:

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

Step Two:

Set the Type as Registration/Re-Registration, and finish your Template setup (if you have custom translations, remember to translate!), and Save

Step Three:

Under Settings > Schools/Programs > Manage Schools > Edit > Registration Settings, assign your new email(s)



Pro Tip: Bulk Email your New Students!

Under Application > Quick Filters, you can filter for Offered students!

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

Lotteries:

Lottery List
Offered List

Lottery Status

- Pending
- Placement Accepted
- Placement Declined

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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Pro Tip: Bulk Email your Returning Students!

In your previous school year, under Registrations > Quick Filters, you can filter for Approved Registrations and Re-Registrations from last cycle!

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

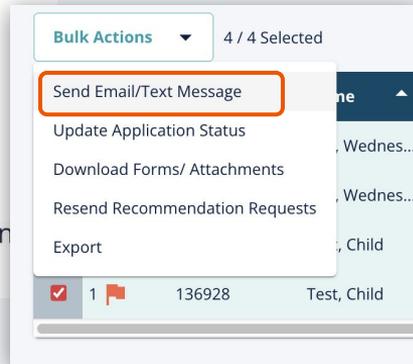
Filter by Status

Show Registrations:

- Submitted
- Not Submitted

With Status:

- Approved
- Denied
- In Processing



Note: This is not applicable if you are in your first year in Enroll!

Testing Your Forms



Test New Registrations

Step 1: Go to your Sandbox site

Step 2: Ensure registration dates are open

Step 3: Find a student in “Accepted” status on Lottery, or edit a student to be in that status

Step 4: Go to the Guardian Users to use Login feature and login as that guardian

Step 5: Go through the registration flow

[Click Here: How to Test on Sandbox](#)

Test Re-Registrations

Step 1: Go to your Sandbox site

Step 2: Ensure re-registration dates are open

Step 3: Find a student who meets your Returning Student criteria in the Students module and click into their Profile

Step 4: Find the attached Guardian and use “Login as Guardian” feature

Step 5: Go through the Re-Registration flow

[Click Here: How to Test on Sandbox](#)

Questions to Consider While Testing

- Are all required fields marked required?
 - Not sure which should be required? Think about the following:
 - Does my SIS require this information for the student?
 - Do I need this data for reports I am using?
- Are there any spelling errors?
- Do you need to change how you captured data last season?
 - Would another format (dropdown, radio buttons, etc.) make reporting and exporting your data easier?
- Do you need to update translations in your registration (for new instructions or fields)?

Q&A

Survey



Q&A

Q: Is there a way to set up an automated update to the sandbox site?

Once a manual refresh of the sandbox site has happens then it takes it off the 2 week refresh cadence. We often see the 2 week refresh is too long especially during lottery season.

Both your CX and our support team can perform a site refresh.

Q: Is there a way to limit the use of special characters on parent entry, such as â î

No, however, you can use custom filters such as "student.fname CONTAINS â" that can pull those students

Q: If you test in sandbox, can you also send emails (or if doing a lottery, publish the lottery) to see the whole process without sending to real parents

Yes! Those emails/texts can be found in the Communication Log and will not actually send to guardians. Please note that they will show the status as an "Error" on Sandbox because they are not actually sending.

Q: Is there a way to print blank reg forms for parents who do not have computers ?

At this time there is not a way to bulk print blank forms. However, an admin does have the ability to complete the registration form on behalf of a guardian

Registration Form Building

- Expert tips for intuitive form layout
- Strategies for enhancing user experience
- Advanced customization techniques

March 19, 2024

[Click Here to Register](#)

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THANK YOU!

