SchoolMint Enroll

Optimizing Readiness: A Registration Form Building Guide

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Meet the Hosts

Alexis Robin
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Presenter

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Sr. Implementation Services Specialist
Q&A

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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**

Two Surveys at the end

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Today's Goals

- Advanced customization techniques
- Tips for intuitive form layout
- Creating a better user experience

Registration Module: The Basics

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Registration Module in SchoolMint

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

A school's registration and re-registration form are shared, and attached in the school's settings. 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.

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Quiz: Why is it important to test the usability of a registration form before launching it?

A. To waste time and resources

B. To ensure that the form is difficult to use

C. To identify and fix any potential issues

D. To amuse yourself with user frustration

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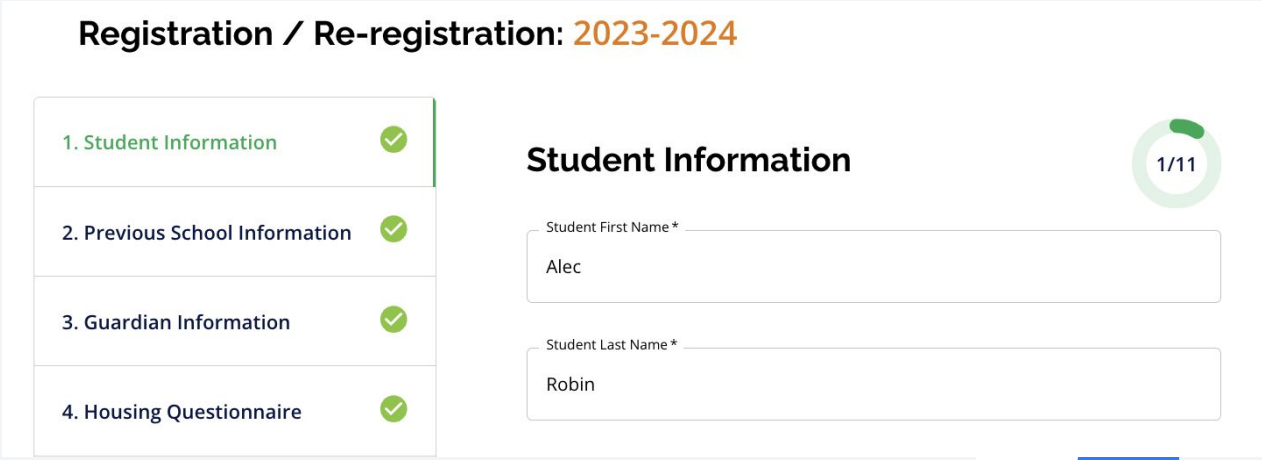
Registration & Re-Registration Form

1. The Registration & Re-Registration process for a school are shared in the same form
2. The form process is comprised of multiple form steps, and each step is made up of form fields
3. As a guardian fills out the form, they move from one step to the next.
4. Steps can have logic and restrictions applied if needed.



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Questions to Consider While Editing

Prior to the start of each new enrollment season, we encourage you to review your registration form with an eye toward the following questions:

- 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? Am I asking questions in a concise way?
- 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)?

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Form Settings

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Registration Forms: Items to Note

- ★ Before making edits, confirm that you are in the proper school year. The school year dropdown is located in the upper righthand corner of the screen.
- ★ Making edits in the upcoming year's registration will not impact the prior year's registration.
    - ****EXCEPTION**** Form fields saved to the Student table span across all enrollment years. Any changes to these fields would also impact prior years. This could result in data loss if you removed or edited answer options or removed the fields entirely.
- ★ Before making edits, confirm that your Registration Dates are closed in the upcoming year: in Settings > Date & Time or if you use School Specific Dates, navigate to Settings > Schools/Programs > and view dates on the Registration Settings tab for each School.

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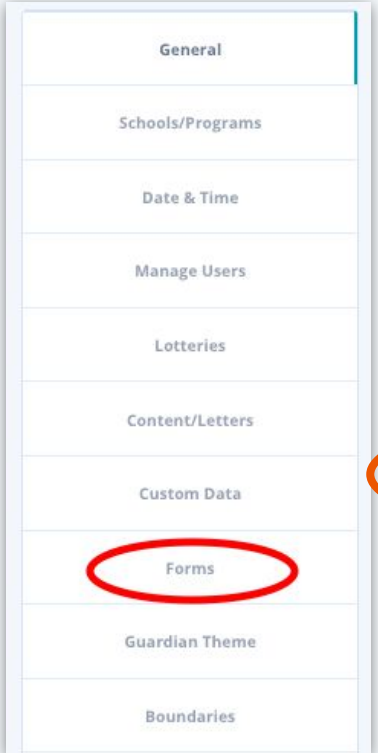
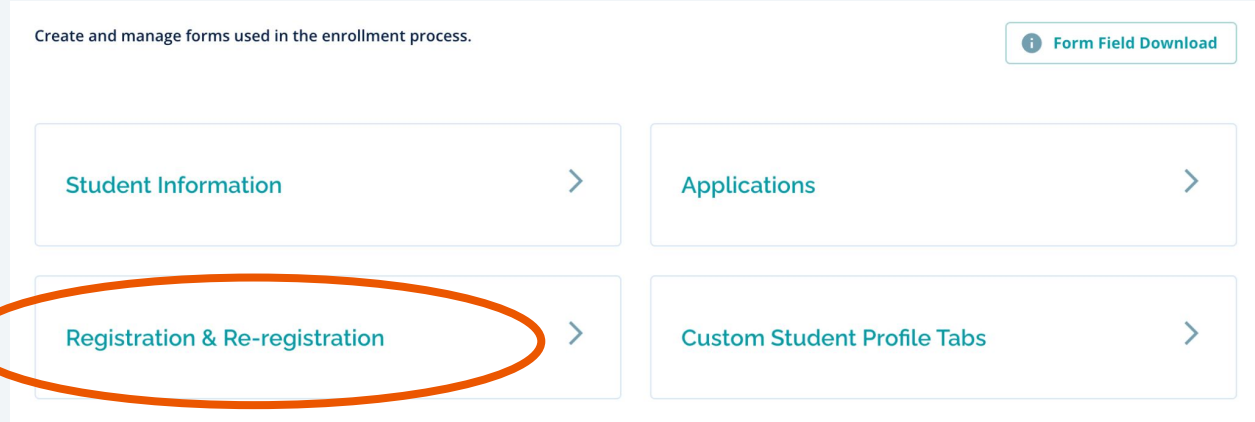
Registration Forms: Editing a Form

In **Settings** click on **Forms**.



From the **Manage Forms** page, click on **Registration & Re-Registration**



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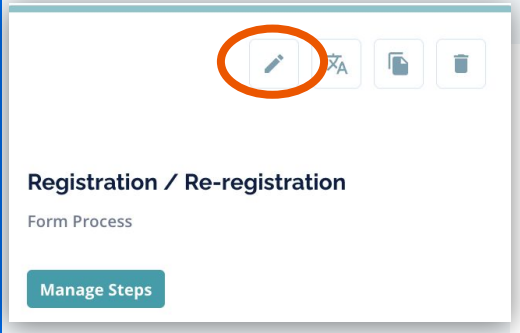
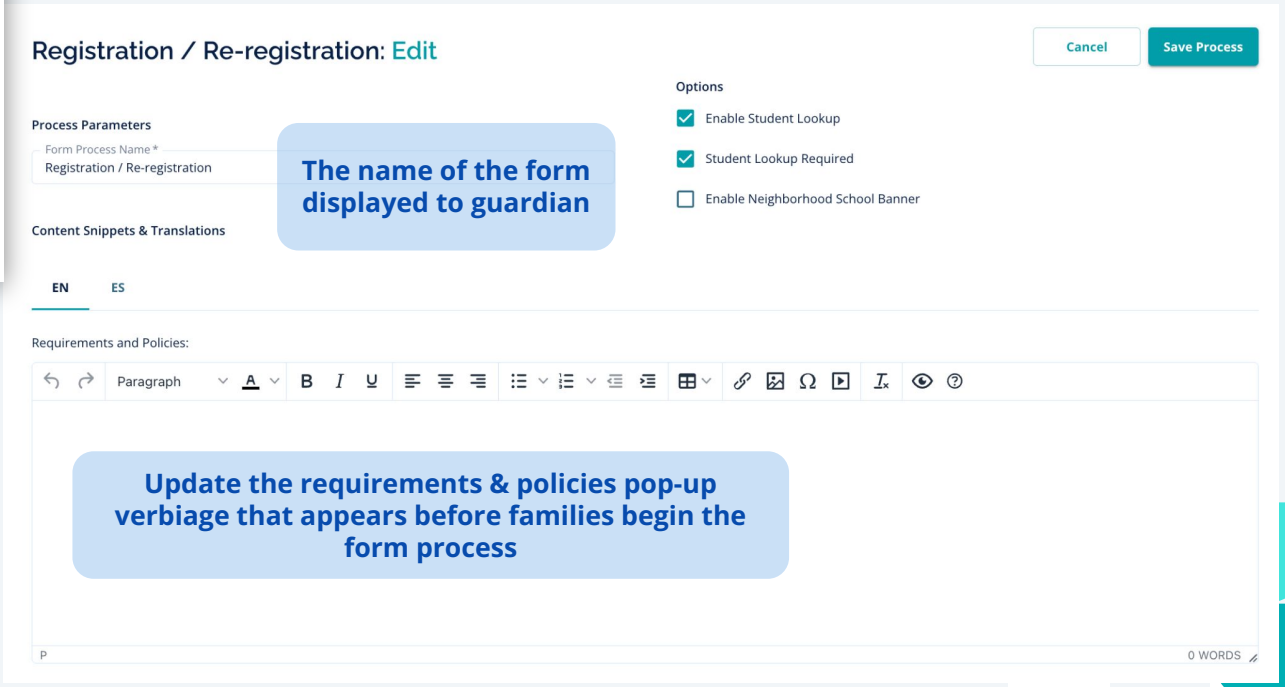
Form Settings

Settings > Forms > Registration & Re-Registration Forms > Edit





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Form Settings

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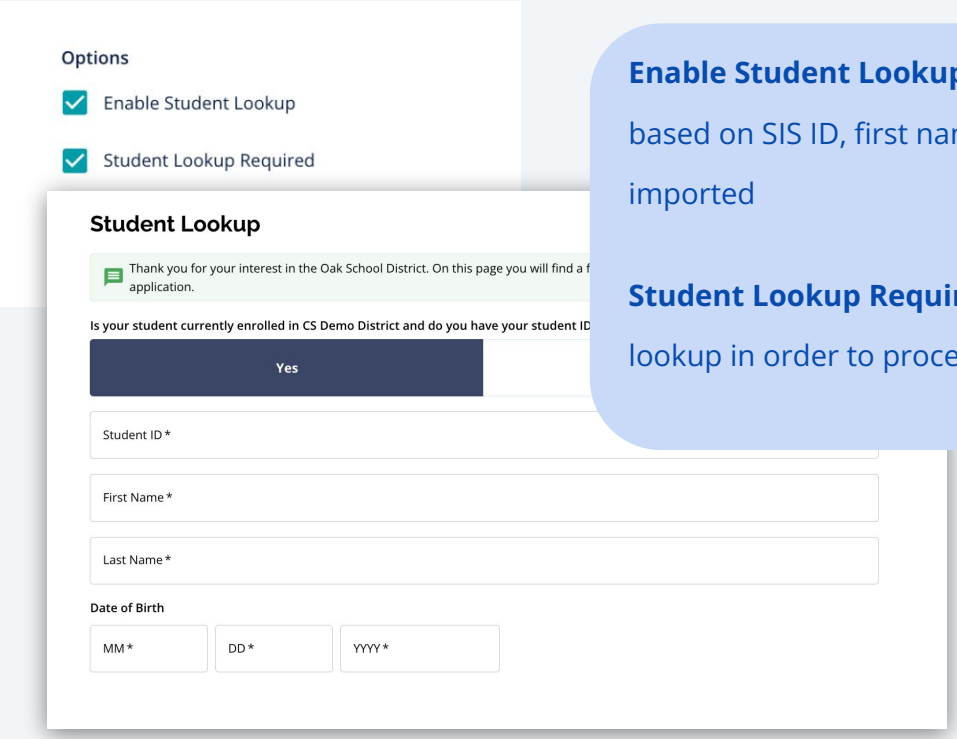

Enable Student Lookup - allows families to find their student based on SIS ID, first name, last name, and DOB, if previously imported

Student Lookup Required - requires families to use the student lookup in order to proceed with the form

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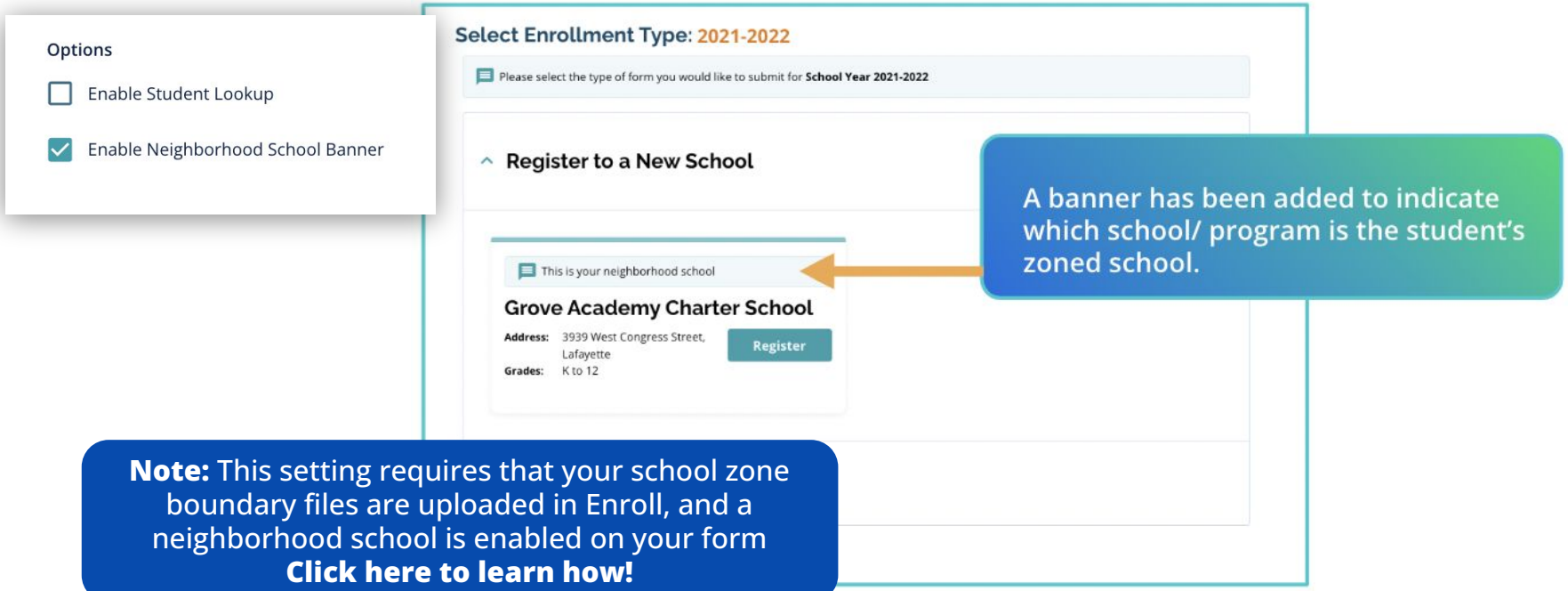
Form Settings

Settings > Forms > Registration & Re-Registration Forms > Edit



Note: This setting requires that your school zone boundary files are uploaded in Enroll, and a neighborhood school is enabled on your form **Click here to learn how!**

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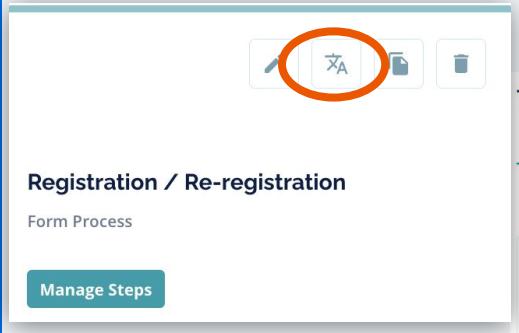
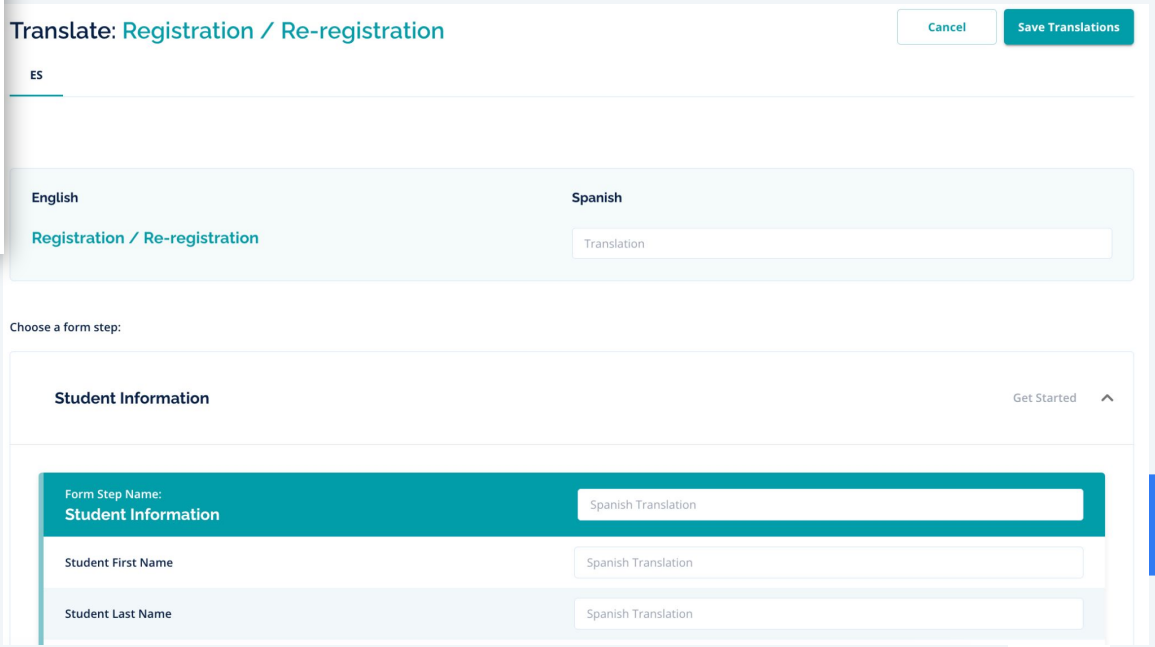
Translate Your Form

Settings > Forms > Registration & Re-Registration Forms > Translate





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Step Settings

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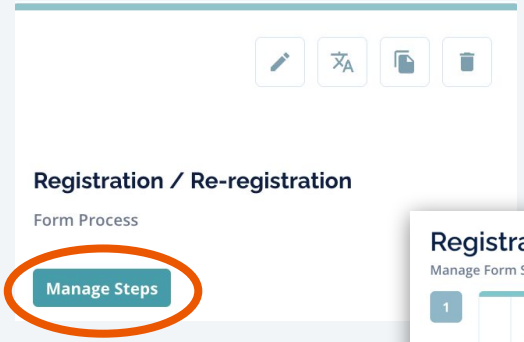
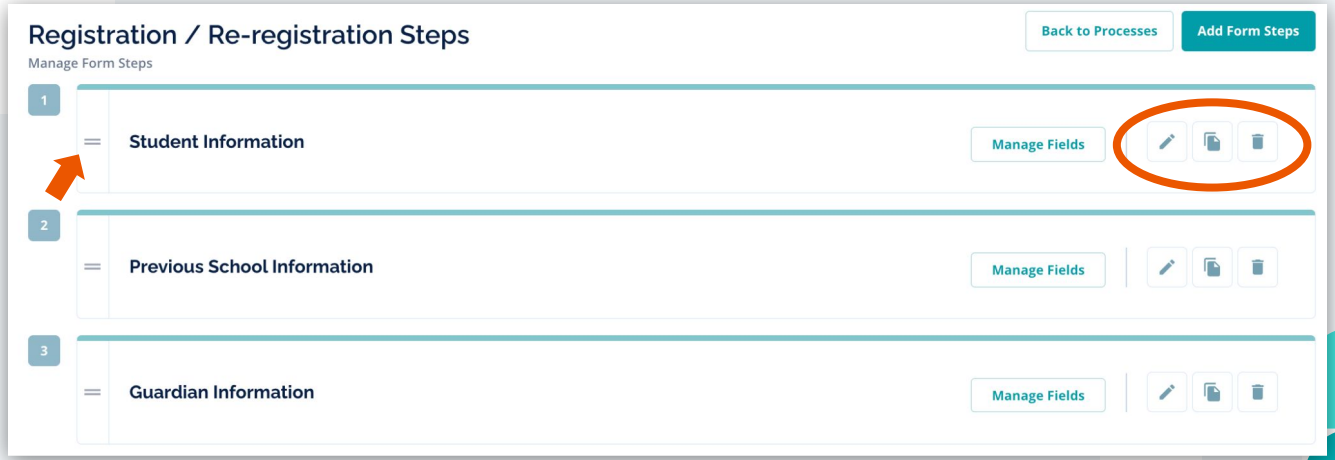
Step Management

Settings > Forms > Registration & Re-Registration Forms > Manage Steps



Each of the Steps have their own settings which can be edited by clicking the pencil icon. You can also reorganize step order, duplicate a step, add steps, or delete steps here



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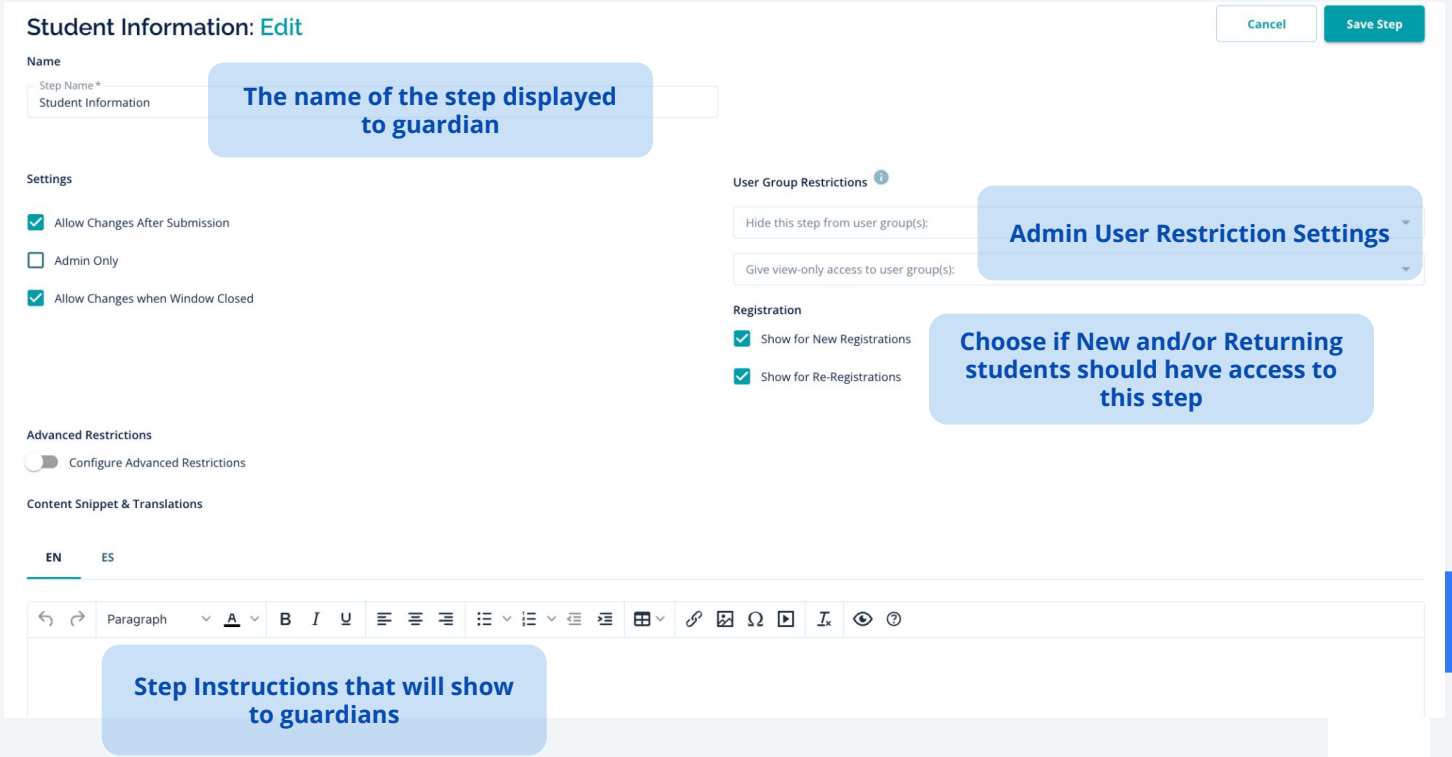
Step Settings

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit



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Step Settings

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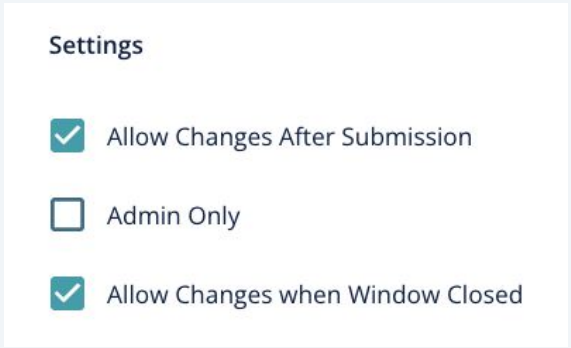

Allow Changes After Submission - allows families to make edits to this step after they have submitted their form, while the window is still open

Allow Changes when Window Closed - allows families to make edits to this step even after the form window has been closed

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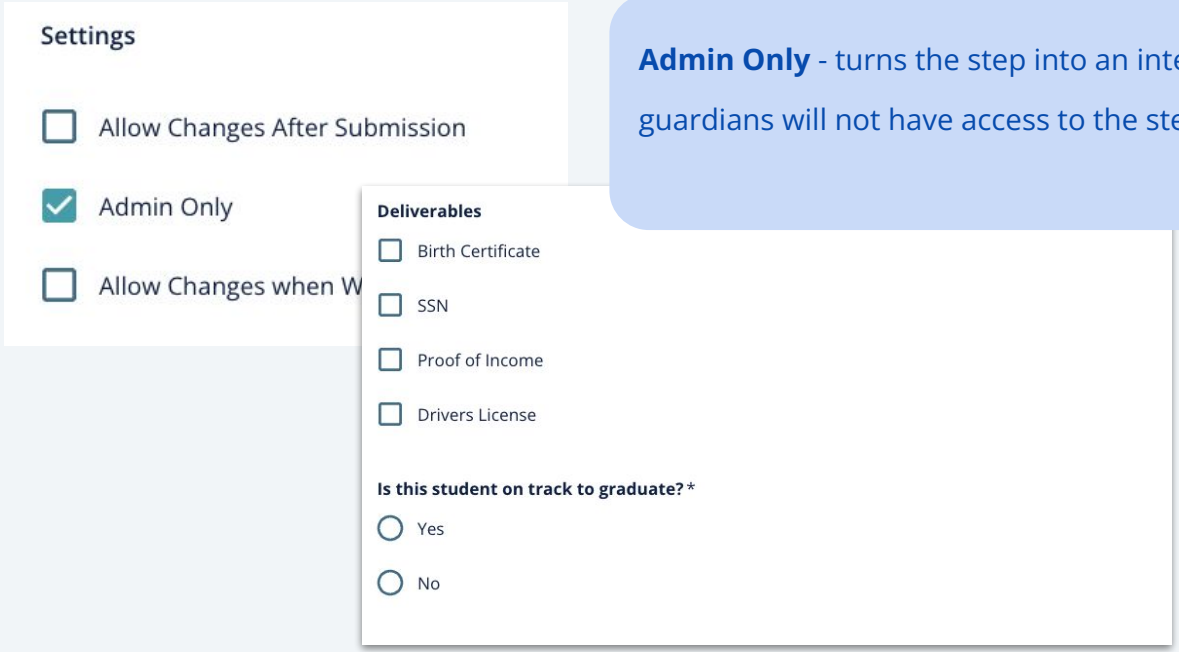
Step Settings

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit



Admin Only - turns the step into an internal use only step; guardians will not have access to the step

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Step Restrictions

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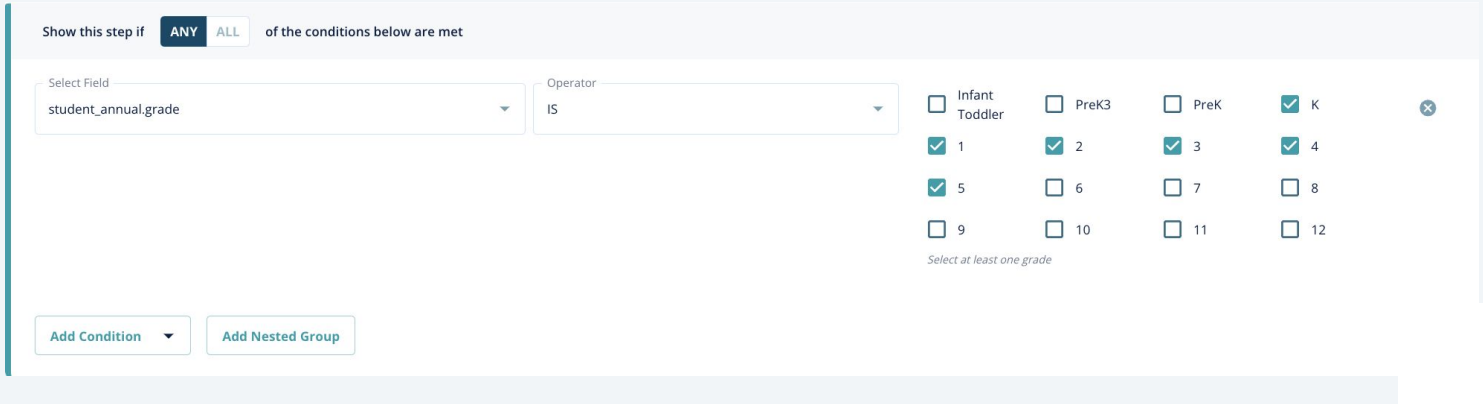
Step Settings

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit

Configure Advanced Restrictions - allows admins to configure which students the step should be accessible to using the Rules Engine



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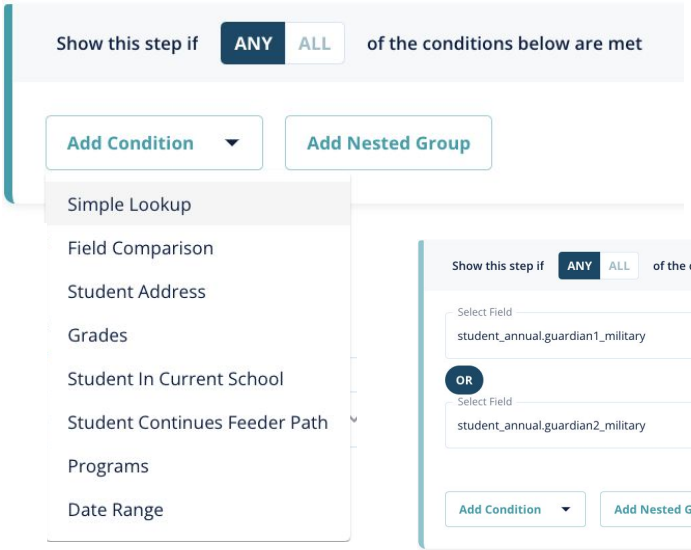
Step Settings

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit

The Rules Engine allows you to use pre-made conditions, or a Simple Lookup to configure your own custom restrictions



Note: Advanced Restrictions cannot be used on the first step of a registration

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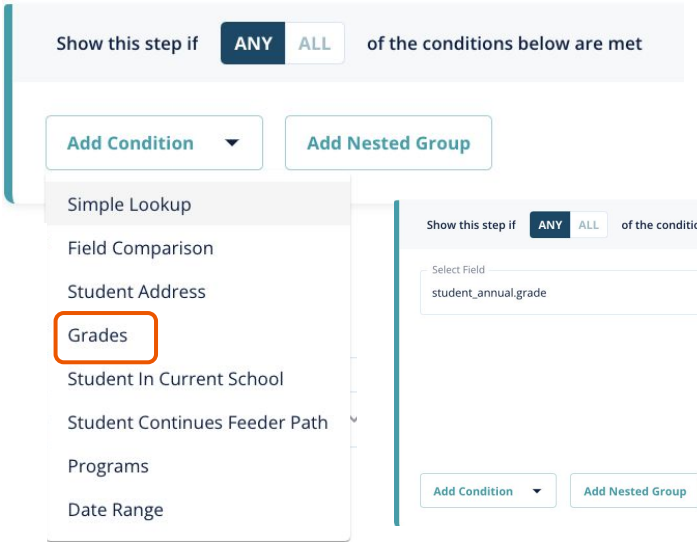
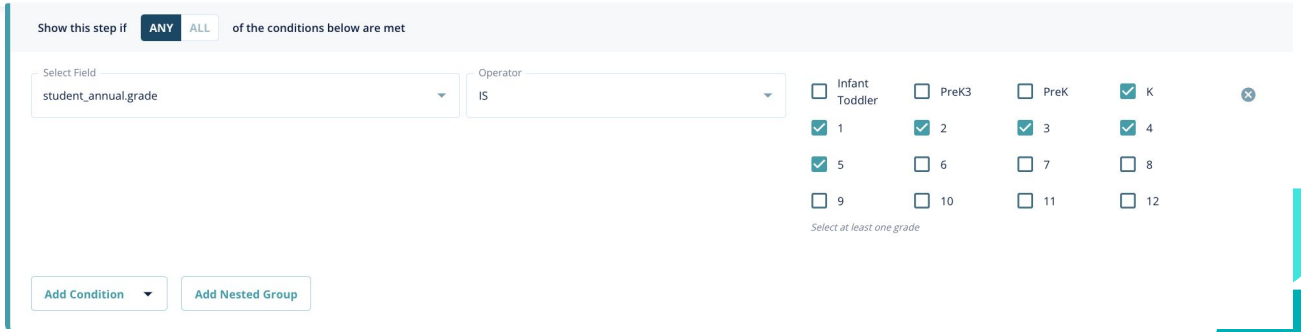
Advanced Restrictions

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit

Here are some common uses for Step Restrictions:



Show the step to specific grades only



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Advanced Restrictions

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Edit

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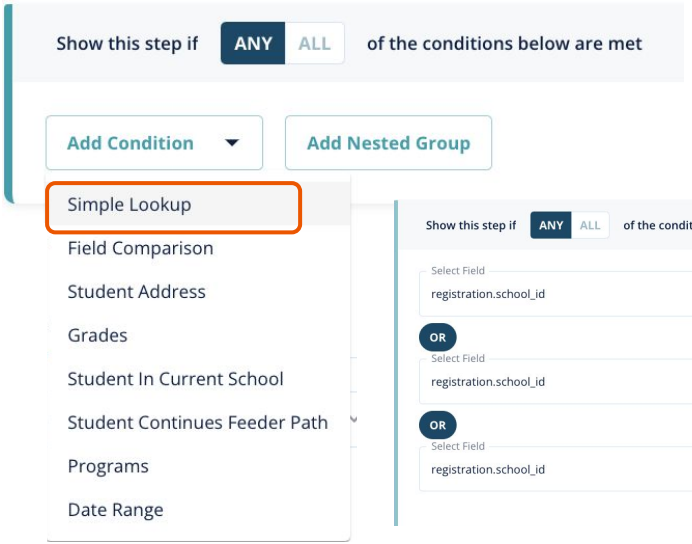
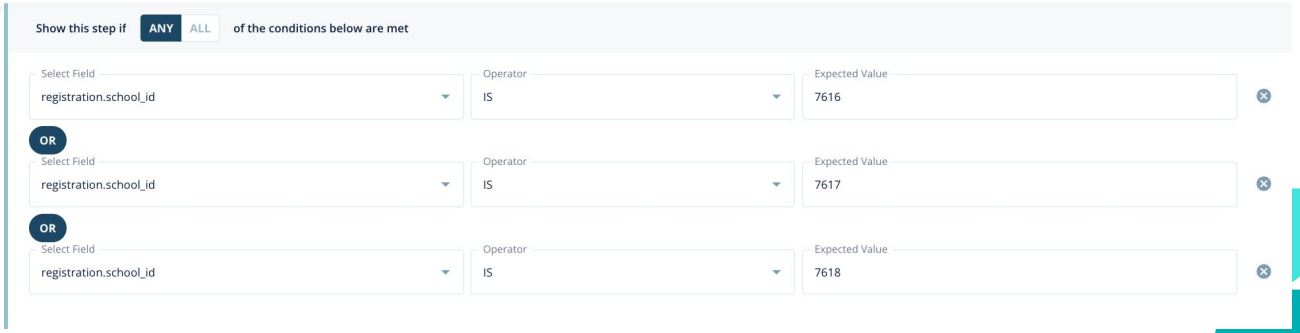


Show the step for specific schools only



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Field Settings

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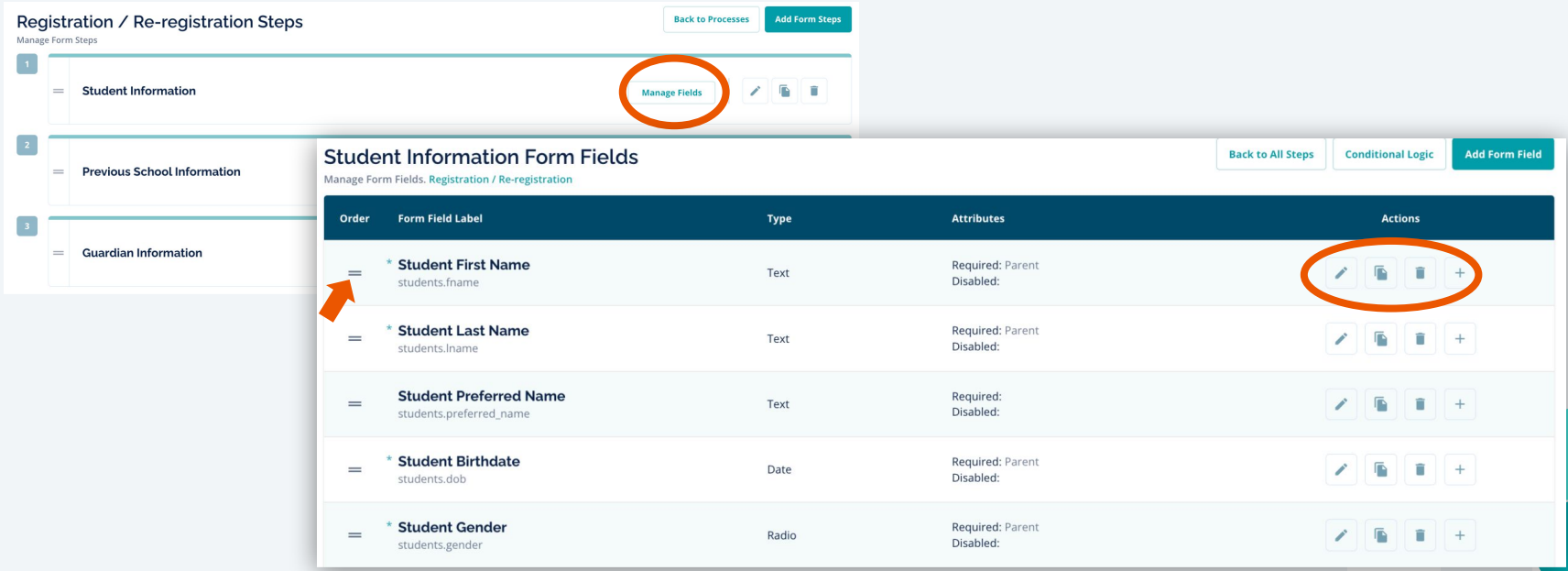
Edit Fields

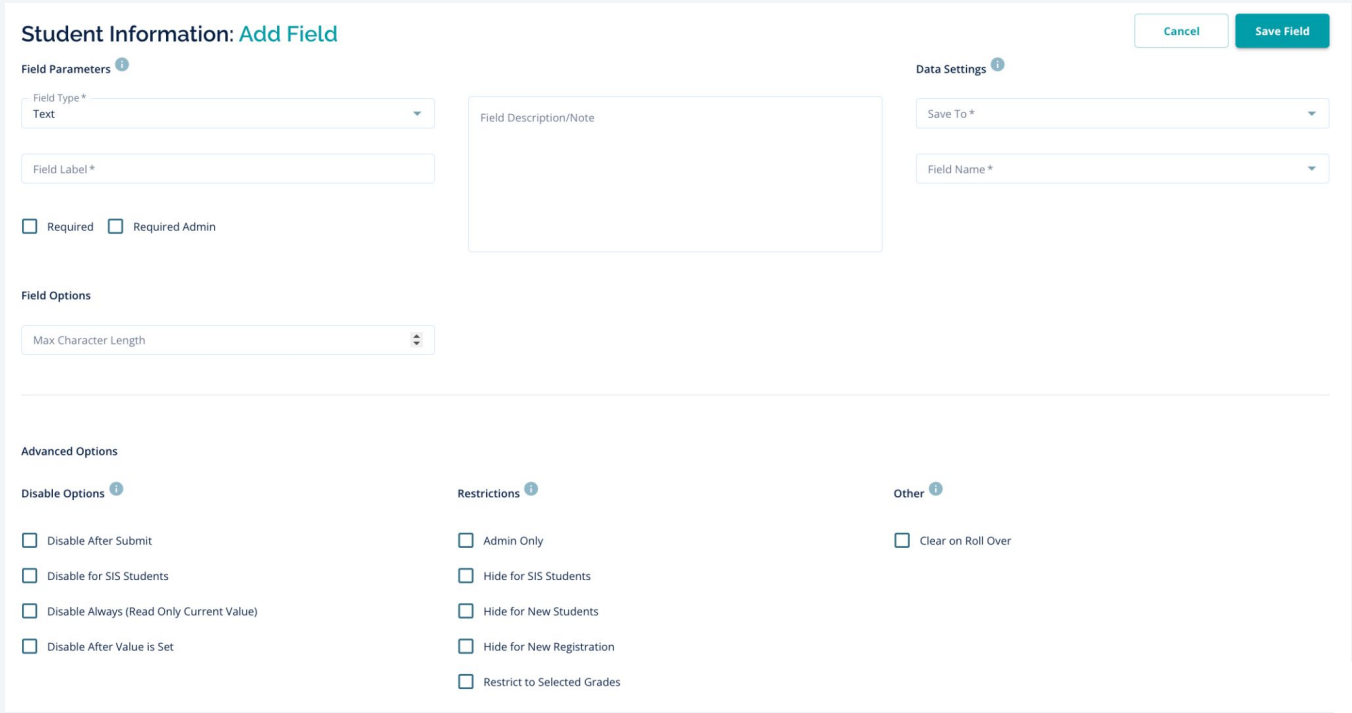
Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields

Each of the Fields have their own settings which can be edited by clicking the pencil icon. You can also reorganize field order, duplicate a field, add fields, or delete fields here



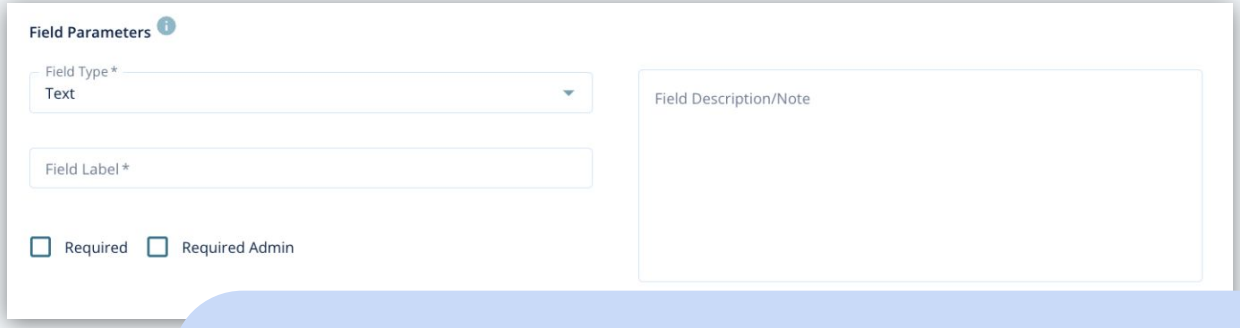
Editing a Form Field

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Edit



Field Parameters

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Edit



Field Type - Choose how you would like to collect the data: Text (short answer), Text Box (long answer), Number Format, Signature, Address Lookup (available for Student and Guardian addresses only), Email Address, Date Menu, File Upload, Dropdown, Checkbox, Radio Button. Select the field type based on the format your SIS should expect.

Field Label - This is what displays to the guardian.

Required/Required Admin - Set whether you show a required field validation for specific types of users

Field Description/Note - Optional if you would like to add additional information or instructions about the field that displays to the guardian.

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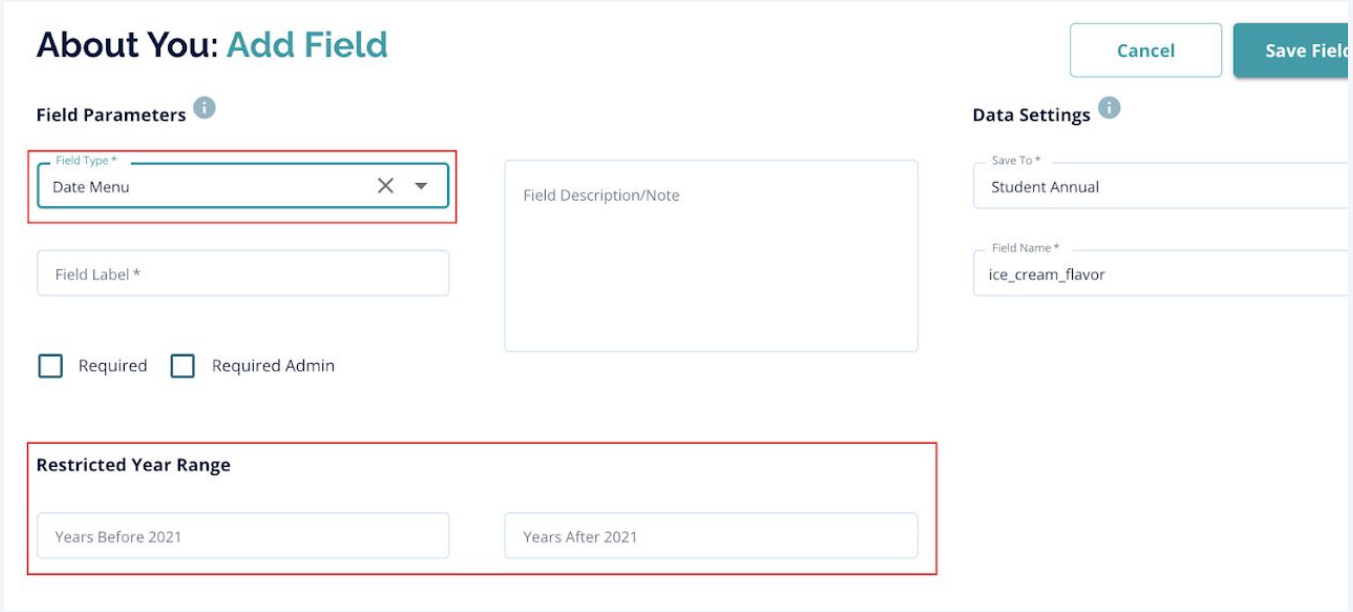
Field Options

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Edit

Depending on the field type you select, there are often custom field options to configure data validations for that field type. Some examples can be seen below:



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Field Options

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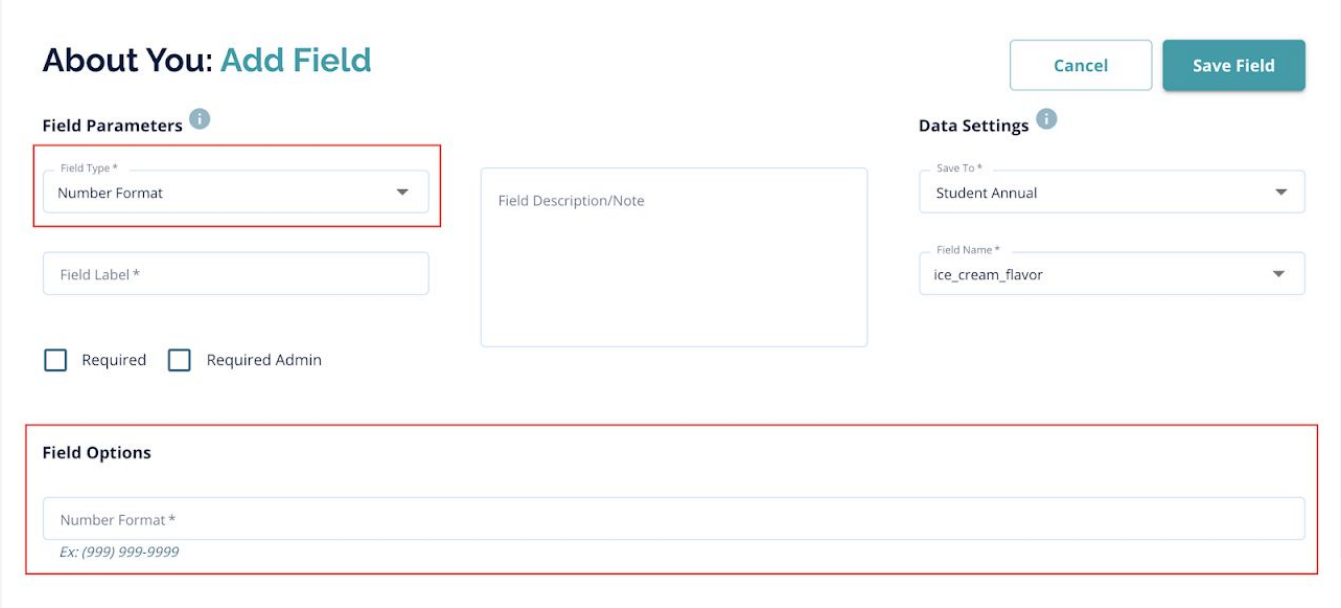

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Field Options

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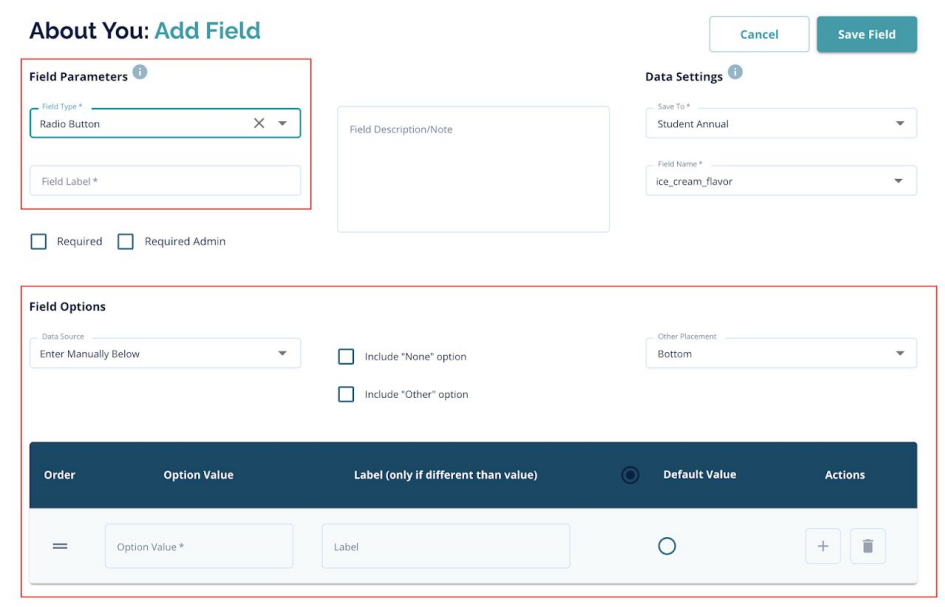

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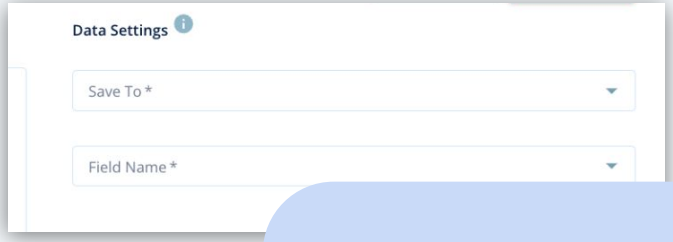
Data Settings

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Edit

When parents fill out forms, organizations must specify where in the database you want to store this information. You can select to store to a standard field or create a custom extension. This will save parents time by auto-filling and auto-updating data, and additionally, when mapping to the SIS, the fields remain consistent year over year.



Student Annual - The record where student information that changes from year to year (addresses, phone numbers, guardian info, grades, etc.) is stored.

Student - Where basic student info that is much less likely to change from year to year should be stored (student name, birthdate, gender, race, etc.).

Registration - Where registration form-specific information should be stored. These records will be used much less often and for more specific uses such as if an essay needs to be program or school-specific and needs to be different across submitted forms

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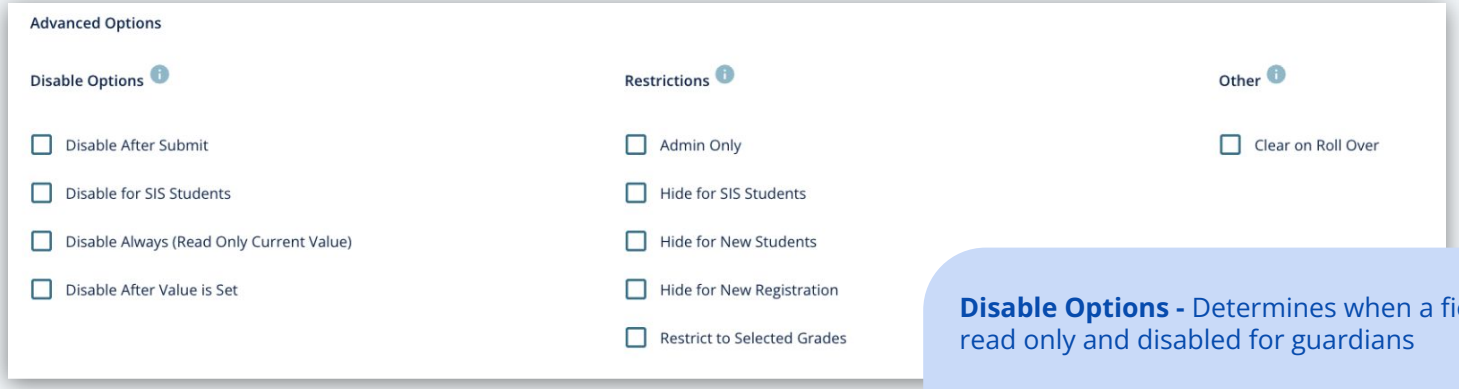
Advanced Options

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Edit

Create advanced options to disable, restrict, or clear data that you are collecting. You can hover over the i for more details



Disable Options - Determines when a field should be read only and disabled for guardians

Restrictions - Controls when to hide/show the field to guardians

Clear on Roll Over - Determines if, once the platform is rolled over, the data collected should carry over into the next year

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Conditional Logic

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Configuring Conditional Logic

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Conditional Logic

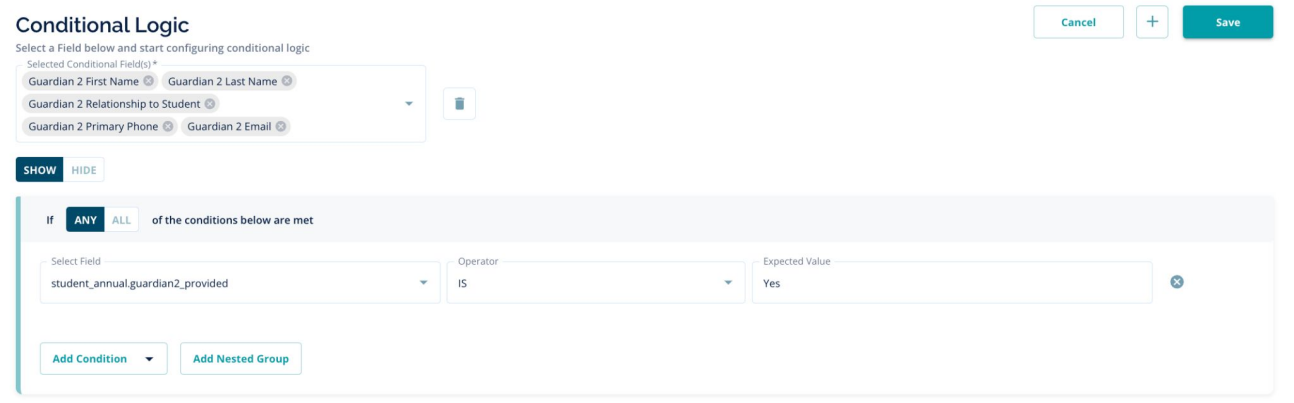
Conditional Logic refers to the logic put in place that determines when and why specific items show or don't show within a form process. It gives the ability to have fields within a form step hide or show based on answers to other questions in that step

Step 1: Write down your scenario

Step 2: Create the Fields (if they don't already exist)

Step 3: Click Conditional Logic to add conditions

Step 4: Test & Troubleshoot!



Configuring Conditional Logic

Settings > Forms > Registration & Re-Registration Forms > Manage Steps > Manage Fields > Conditional Logic

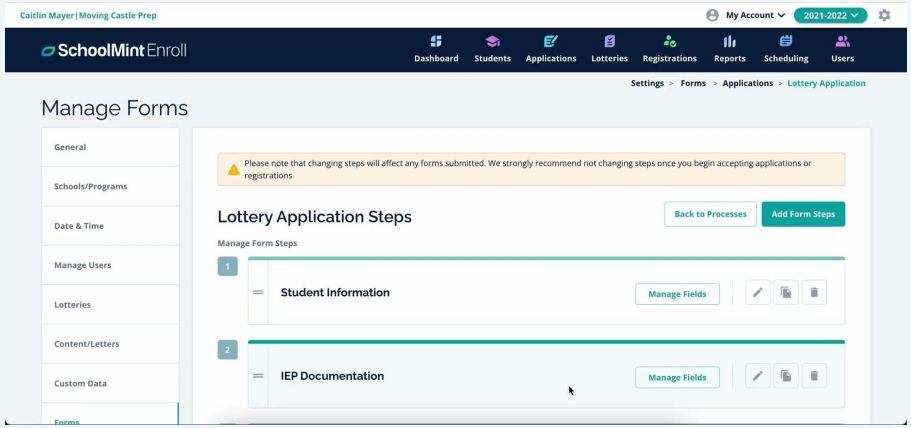
Scenario: IEP Documentation

Q1: Does this student have an IEP?

- ➔ No - Do nothing
- ➔ Yes - Show Q2

Q2: Do you have documentation for this accommodation?

- ➔ Yes - Show uploads field
- ➔ No - Show content snippet with instructions



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Form Process Tips

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Registration & Re-Registration Process

- ★ Streamline your form for returning students by only asking them to update the information they need to revalidate every year. This can be done by adding your data needed for new students only in their own steps, and using your step restrictions.
- ★ The Student Information step can usually be shared by both Returning and New students to validate their student data. Use the advanced field restrictions to hide any questions that aren't relevant within the step
- ★ To facilitate reviewing all existing form fields with a goal of identifying those requiring edits, go Settings > Forms > click the `Form Field Download` button to access your Form Field Report and Form Field Options Report as .csv files.

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Conditional Logic & Restrictions

- If you have any conditionally *required* fields - for example “if the answer is YES to this Question 1, then Question 2 should be required,” the recommended method to handle this would be to require Question 2, and set conditional logic to show Question 2 only if the student answers Yes to Question 1.
- For Intent to Return forms, you can make this part of your Re-Registration Process. Add an intent to return question on the first step of your Re-Registration form. You can then use the Advanced Restrictions on your Re-Registration steps to only show them for students who answered that they intend to return
- Advanced Restrictions cannot be used on the first step of a registration.
- If fields or steps are using conditional logic (to show or hide based on a prior answer) be very careful when reordering in order to not cause the conditional logic to break.

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Sync Service

- ★ Race, Ethnicity, Gender, and Relationship are typically standardized data in your SIS. Ensure these are not open text fields on your form
- ★ If you have an API Connection (PowerSchool, Skyward, or Aries), use the Field Code Download to gather the values that your SIS accepts to ensure your Enroll form is capturing that data as expected

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PowerSchool

- ★ In order to import Contacts in PowerSchool, a First Name, Last Name, Relationship, and Email/Phone are required. Ensuring that all those fields are required for contacts will prevent Partial Syncs
- ★ In order to import Doctor information in PowerSchool, both Doctor Name and Doctor Phone are required. Ensuring both of those fields are required in your registration form will prevent Partial or Failed Syncs

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Q&A

Survey

SCAN ME

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Q&A

Q: If guardian does student lookup using SIS student ID, can we use information from SIS and populate fields such as current grade, current school (using SIS building code)?	**A:** Yes! When importing student data, you can choose to include additional fields that can pre-populate in the form. At minimum, student's ID, first name, last name, and date of birth are required. Many other fields can be added to the system, as long as the fields are in the form.

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Registration Management

- Create Effective Saved Views
- Troubleshoot Unexpected Challenges
- Common Report Columns and Filters

April 4, 2024

Click Here to Register

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Admin Resources

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Help Articles

Webinar Calendar and Resources

Issues, Bugs, and General Q&As

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THANK YOU!

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