



SchoolMint Enroll

Optimizing Readiness: A Registration Form Building Guide



Meet the Hosts



Alexis Robin
Sr. Professional Services Specialist
Presenter



Kat Ingram
Sr. Implementation Services Specialist
Q&A



Logistics

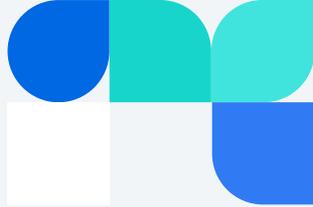


Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end:

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

Two Surveys at the end



Today's Goals

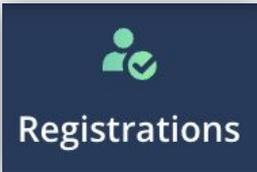
- Advanced customization techniques
- Tips for intuitive form layout
- Creating a better user experience



Registration Module: The Basics



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.



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

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.

Registration / Re-registration: 2023-2024

1. Student Information	✓
2. Previous School Information	✓
3. Guardian Information	✓
4. Housing Questionnaire	✓

Student Information

1/11

Student First Name *
Alec

Student Last Name *
Robin



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)?

Form Settings



Registration Forms: Items to Note

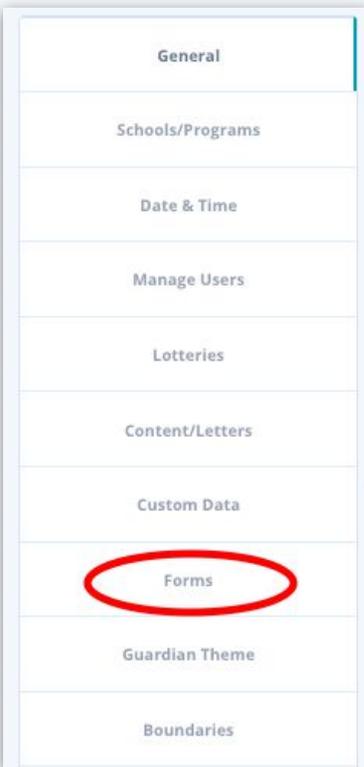
- ★ Before making edits, confirm that you are in the proper school year. The school year dropdown is located in the upper righthand corner of the screen.
- ★ Making edits in the upcoming year's registration will not impact the prior year's registration.
 - ****EXCEPTION**** Form fields saved to the Student 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.

Registration Forms: Editing a Form

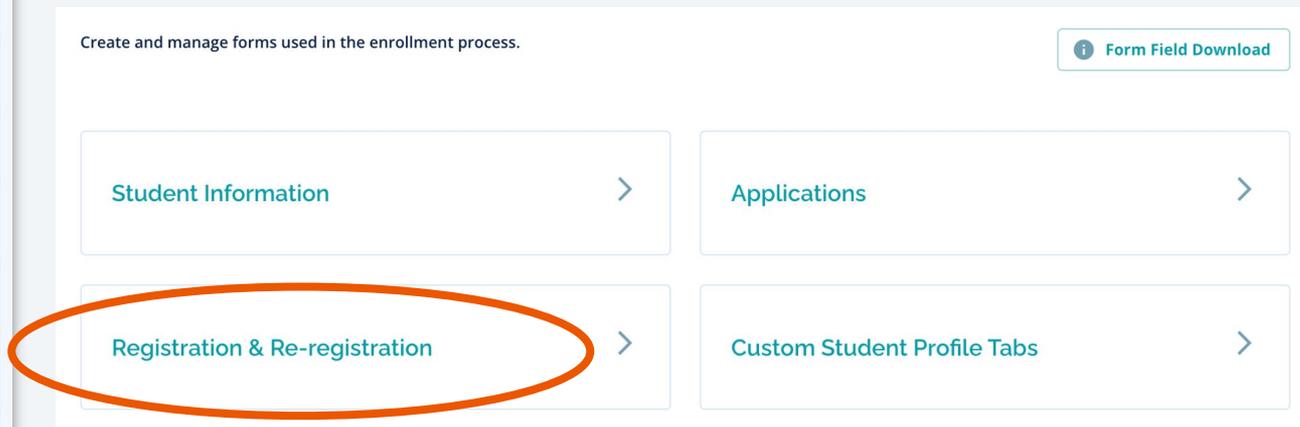
In **Settings**



click on **Forms**.

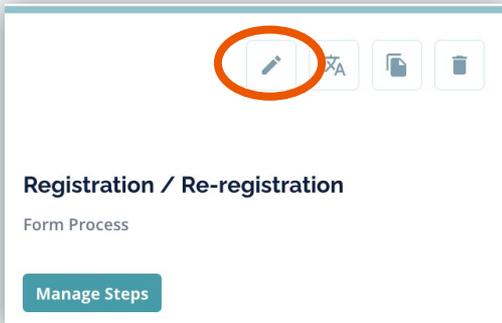


From the **Manage Forms** page, click on **Registration & Re-Registration**



Form Settings

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



Registration / Re-registration

Form Process

Manage Steps

The card shows a toolbar with four icons: a pencil (circled in orange), a document with a slash, a document, and a trash can.

Registration / Re-registration: Edit

Cancel

Save Process

Process Parameters

Form Process Name*
Registration / Re-registration

The name of the form displayed to guardian

Content Snippets & Translations

EN ES

Requirements and Policies:

Paragraph A B I U List Bulleted List Numbered List Table Link Image Omega Video Text Eye Help

Update the requirements & policies pop-up verbiage that appears before families begin the form process

P

0 WORDS

Form Settings

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



Options

- Enable Student Lookup
- Student Lookup Required

Student Lookup

Thank you for your interest in the Oak School District. On this page you will find a form to complete your application.

Is your student currently enrolled in CS Demo District and do you have your student ID?

Yes

Student ID *

First Name *

Last Name *

Date of Birth

MM *

DD *

YYYY *

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

Form Settings

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



Options

- Enable Student Lookup
- Enable Neighborhood School Banner

Select Enrollment Type: 2021-2022

Please select the type of form you would like to submit for School Year 2021-2022

Register to a New School

This is your neighborhood school

Grove Academy Charter School

Address: 3939 West Congress Street,
Lafayette

Grades: K to 12

Register

A banner has been added to indicate which school/ program is the student's zoned school.

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!](#)

Translate Your Form

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



Registration / Re-registration

Form Process

[Manage Steps](#)

Translate: Registration / Re-registration

[Cancel](#) [Save Translations](#)

ES

English Spanish

Registration / Re-registration

Choose a form step:

Student Information Get Started ^

Form Step Name:	<input type="text" value="Spanish Translation"/>
Student First Name	<input type="text" value="Spanish Translation"/>
Student Last Name	<input type="text" value="Spanish Translation"/>

Step Settings



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

Registration / Re-registration

Form Process

Manage Steps

Registration / Re-registration Steps

Back to Processes

Add Form Steps

Manage Form Steps

1	= Student Information	Manage Fields	  
2	= Previous School Information	Manage Fields	  
3	= Guardian Information	Manage Fields	  

Step Settings

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



Student Information: Edit Cancel Save Step

Name

Step Name *
Student Information

The name of the step displayed to guardian

Settings

Allow Changes After Submission

Admin Only

Allow Changes when Window Closed

User Group Restrictions

Hide this step from user group(s):

Give view-only access to user group(s):

Admin User Restriction Settings

Registration

Show for New Registrations

Show for Re-Registrations

Choose if New and/or Returning students should have access to this step

Advanced Restrictions

Configure Advanced Restrictions

Content Snippet & Translations

EN ES

Paragraph A B I U [List icons] [Table icon] [Link icon] [Image icon] [Media icon] [Text icon] [Help icon]

Step Instructions that will show to guardians

Step Settings

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



Settings

- Allow Changes After Submission
- Admin Only
- Allow Changes when Window Closed

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

Step Settings

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



Settings

Allow Changes After Submission

Admin Only

Allow Changes when W

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

Deliverables

Birth Certificate

SSN

Proof of Income

Drivers License

Is this student on track to graduate? *

Yes

No

Step Restrictions



Step Settings

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



Advanced Restrictions

Configure Advanced Restrictions

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

Show this step if **ANY** **ALL** of the conditions below are met

Select Field: student_annual.grade Operator: IS

<input type="checkbox"/> Infant Toddler	<input type="checkbox"/> PreK3	<input type="checkbox"/> PreK	<input checked="" type="checkbox"/> K	<input type="button" value="x"/>
<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/> 4	
<input checked="" 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	

Select at least one grade

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

Show this step if **ANY** **ALL** of the conditions below are met

Add Condition ▾

Add Nested Group

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Programs

Date Range

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

Show this step if **ANY** **ALL** of the conditions below are met

Select Field	Operator	Expected Value
student_annual.guardian1_military	IS	Yes
OR		
Select Field	Operator	Expected Value
student_annual.guardian2_military	IS	Yes

Add Condition ▾

Add Nested Group

Advanced Restrictions

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

Here are some common uses for Step Restrictions:

Show this step if **ANY** **ALL** of the conditions below are met

Add Condition

Add Nested Group

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Programs

Date Range

Show the step to specific grades only

Show this step if **ANY** **ALL** of the conditions below are met

Select Field

student_annual.grade

Operator

IS

- | | | | | |
|--|---------------------------------------|---------------------------------------|---------------------------------------|--------------------------|
| <input type="checkbox"/> Infant
Toddler | <input type="checkbox"/> PreK3 | <input type="checkbox"/> PreK | <input checked="" type="checkbox"/> K | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> 1 | <input checked="" type="checkbox"/> 2 | <input checked="" type="checkbox"/> 3 | <input checked="" type="checkbox"/> 4 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> 5 | <input type="checkbox"/> 6 | <input type="checkbox"/> 7 | <input type="checkbox"/> 8 | <input type="checkbox"/> |
| <input type="checkbox"/> 9 | <input type="checkbox"/> 10 | <input type="checkbox"/> 11 | <input type="checkbox"/> 12 | <input type="checkbox"/> |

Select at least one grade

Add Condition

Add Nested Group

Advanced Restrictions

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

Here are some common uses for Step Restrictions:

Show this step if **ANY** **ALL** of the conditions below are met

Add Condition ▼

Add Nested Group

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Programs

Date Range

Show the step for specific schools only

Show this step if **ANY** **ALL** of the conditions below are met

Select Field	Operator	Expected Value	
registration.school_id	IS	7616	✕
OR			
Select Field	Operator	Expected Value	
registration.school_id	IS	7617	✕
OR			
Select Field	Operator	Expected Value	
registration.school_id	IS	7618	✕

Field Settings



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

Registration / Re-registration Steps

Manage Form Steps

Back to Processes Add Form Steps

1 Student Information Manage Fields

2 Previous School Information

3 Guardian Information

Student Information Form Fields

Manage Form Fields, Registration / Re-registration

Back to All Steps Conditional Logic Add Form Field

Order	Form Field Label	Type	Attributes	Actions
=	* Student First Name students.fname	Text	Required: Parent Disabled:	   
=	* Student Last Name students.lname	Text	Required: Parent Disabled:	   
=	Student Preferred Name students.preferred_name	Text	Required: Disabled:	   
=	* Student Birthdate students.dob	Date	Required: Parent Disabled:	   
=	* Student Gender students.gender	Radio	Required: Parent Disabled:	   

Editing a Form Field

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



Student Information: [Add Field](#)

[Cancel](#) [Save Field](#)

Field Parameters

Field Type *
Text

Field Label *

Required Required Admin

Field Description/Note

Data Settings

Save To *

Field Name *

Field Options

Max Character Length

Advanced Options

Disable Options

Disable After Submit
 Disable for SIS Students
 Disable Always (Read Only Current Value)
 Disable After Value is Set

Restrictions

Admin Only
 Hide for SIS Students
 Hide for New Students
 Hide for New Registration
 Restrict to Selected Grades

Other

Clear on Roll Over

Field Parameters

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

A screenshot of the 'Field Parameters' form. The form has a title 'Field Parameters' with an information icon. It contains a 'Field Type*' dropdown menu with 'Text' selected, a 'Field Label*' text input field, and two checkboxes: 'Required' and 'Required Admin', both of which are currently unchecked. To the right of these fields is a large text area labeled 'Field Description/Note'.

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.

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:

The screenshot shows a web form titled "About You: Add Field" with two main sections: "Field Parameters" and "Data Settings".

- Field Parameters:**
 - Field Type*:** A dropdown menu with "Date Menu" selected. This field is highlighted with a red box.
 - Field Label*:** An empty text input field.
 - Field Description/Note:** A large empty text area.
 - Required:** An unchecked checkbox.
 - Required Admin:** An unchecked checkbox.
 - Restricted Year Range:** A section highlighted with a red box containing two input fields: "Years Before 2021" and "Years After 2021".
- Data Settings:**
 - Save To*:** A dropdown menu with "Student Annual" selected.
 - Field Name*:** A text input field containing "ice_cream_flavor".

At the top right of the form are two buttons: "Cancel" and "Save Field".

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:

About You: Add Field

CancelSave Field

Field Parameters i

Field Type *
Number Format

Field Label *

Required Required Admin

Field Description/Note

Data Settings i

Save To *
Student Annual

Field Name *
ice_cream_flavor

Field Options

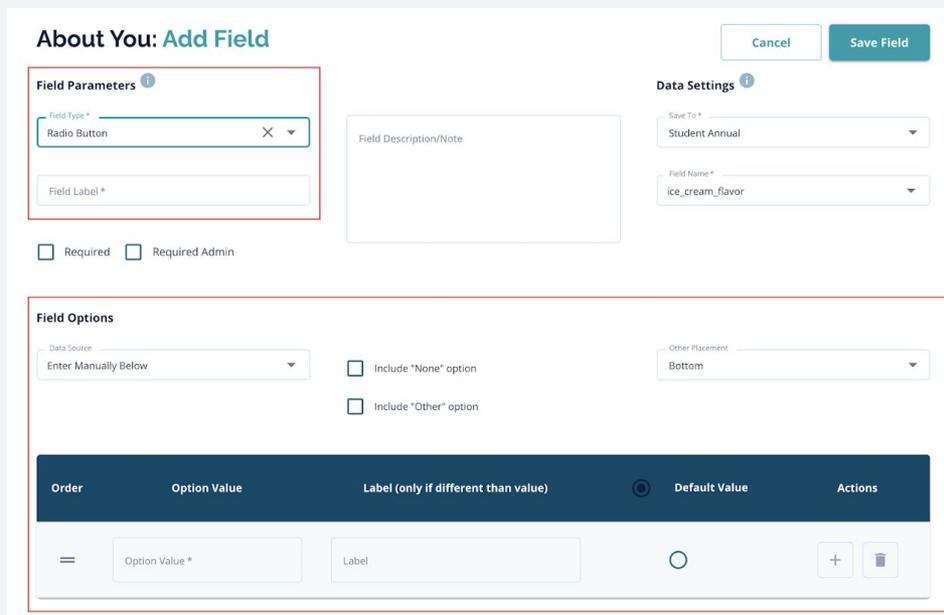
Number Format *

Ex: (999) 999-9999

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:



About You: Add Field Cancel Save Field

Field Parameters

Field Type* Radio Button

Field Label*

Required Required Admin

Field Description/Note

Data Settings

Save To* Student Annual

Field Name* ice_cream_flavor

Field Options

Data Source: Enter Manually Below

Include *None* option

Include *Other* option

Other Placement: Bottom

Order	Option Value	Label (only if different than value)	Default Value	Actions
=	Option Value*	Label	<input type="radio"/>	+ 

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.



The screenshot shows a form titled "Data Settings" with a help icon. It contains two dropdown menus. The first is labeled "Save To*" and the second is labeled "Field Name*".

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

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  for more details

Advanced Options

Disable Options 	Restrictions 	Other 
<input type="checkbox"/> Disable After Submit	<input type="checkbox"/> Admin Only	<input type="checkbox"/> Clear on Roll Over
<input type="checkbox"/> Disable for SIS Students	<input type="checkbox"/> Hide for SIS Students	
<input type="checkbox"/> Disable Always (Read Only Current Value)	<input type="checkbox"/> Hide for New Students	
<input type="checkbox"/> Disable After Value is Set	<input type="checkbox"/> Hide for New Registration	
	<input type="checkbox"/> Restrict to Selected Grades	

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

Conditional Logic



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!

Conditional Logic

Select a Field below and start configuring conditional logic

Selected Conditional Field(s)*

Guardian 2 First Name Guardian 2 Last Name
Guardian 2 Relationship to Student
Guardian 2 Primary Phone Guardian 2 Email

SHOW HIDE

If **ANY** ALL of the conditions below are met

Select Field: student_annual.guardian2_provided Operator: IS Expected Value: Yes

Add Condition Add Nested Group

Cancel + Save

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

The screenshot displays the SchoolMint Enroll web application interface. At the top, there is a navigation bar with the user's name 'Caitlin Mayer | Moving Castle Prep', the current school year '2021-2022', and a settings icon. Below this is a dark navigation menu with icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main content area is titled 'Manage Forms' and shows a breadcrumb trail: 'Settings > Forms > Applications > Lottery Application'. A warning message at the top of the main content area states: 'Please note that changing steps will affect any forms submitted. We strongly recommend not changing steps once you begin accepting applications or registrations'. Below the warning, the 'Lottery Application Steps' section is visible, containing two steps: '1 Student Information' and '2 IEP Documentation'. Each step has a 'Manage Fields' button and icons for editing, deleting, and adding new fields.

Form Process Tips



Registration & Re-Registration Process

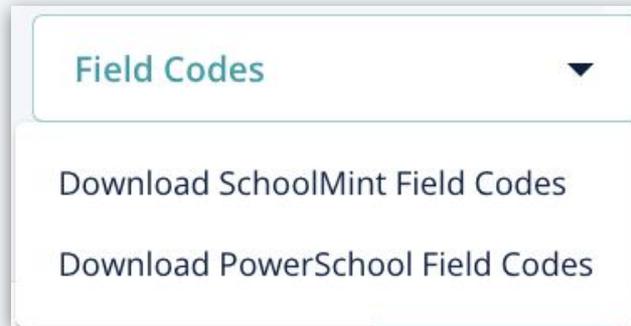
- ★ Streamline your form for returning students by only asking them to update the information they need to revalidate every year. This can be done by adding your data needed for new students only in their own steps, and using your step restrictions.
- ★ The Student Information step can usually be shared 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.

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.

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



A screenshot of a dropdown menu. The menu is open, showing two options: "Download SchoolMint Field Codes" and "Download PowerSchool Field Codes". The dropdown is titled "Field Codes" with a downward arrow on the right side.

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

Q&A

Survey



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.

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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Feature Requests

Admin Resources

THANK YOU!

