



SchoolMint Enroll

Registrar 101: Mastering Registration Management

Meet the Hosts



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Presenter



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Q&A



Logistics

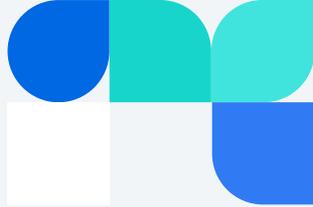


Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end:

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

Two Surveys at the end



Today's Goals

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



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). These students can be filtered for and managed in the Registrations module.

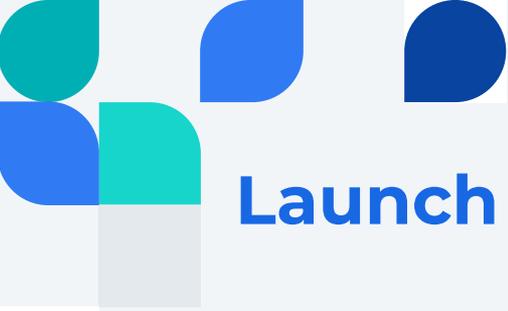


Poll: If registration management had a theme song, what would it be?

- A. "Under Pressure" by Queen & David Bowie**
 - B. "The Final Countdown" by Europe**
 - C. "Ready or Not" by The Fugees**
 - D. "Here Comes the Sun" by The Beatles**
- 

Registration: Launch

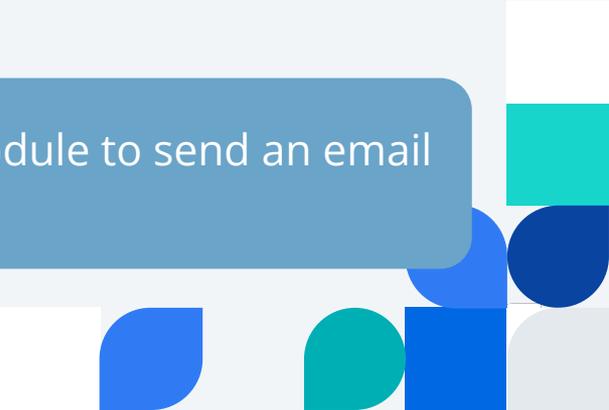




Launch Your Forms

- ★ You've reviewed the **Registration checklist**
- ★ You've made any expected changes
- ★ You've tested forms
- ★ You've made sure your dates are open
- ★ Your families can access the login URL
- ★ You've communicated with your families

Optional: Use the Bulk Action in the Application Module to send an email to all Offered students.



Registration: Manage



Registration: Filtering

The registration module allows you to filter by various criteria such as submission & approval status, sync information, registration type, and flags. You can also create your own filters and views.

Filter by Status

Show Registrations:

Submitted Not Submitted

With Status:

Approved Denied In Processing

Submission Date Range:

From To

Withdrawn:

Withdrawn Not Withdrawn

Sync Status:

Status

Last Sync:

From To

Filter by School Information

School Levels

School

Grade

Deliverables

Event

Type:

New Registration Re-Registration

Filter by Student Attributes

Flags

Student SIS Information:

Has SIS ID Does Not Have SIS ID

Registration: Flags

Flags are a great way to isolate registrations that need further review. Your Enroll platform comes with system default flags, but you can also configure your own custom flags! Common custom flags for registration include IEP, 504, Expelled, Mckinney Vento, and Income

Flags

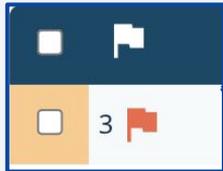
System Flags

- Age Verification
- Duplicate Student Detected
- Non-Validated Address
- Possible Duplicate Student

Custom Flags

- IEP

[Click Here:
How do I create a flag?](#)



Date/Time	Flag Message	Dismissed By	Dismissed
02/05/2024 12:24:52 PM	IEP/504 <i>Student indicated they have an IEP or 504 Plan</i>		<input type="checkbox"/>

Registration: Custom Filters

If you need to filter for specific criteria that is not included in your quick filters, you can use the Add Filters option to create your own filters

Common Custom Filters

- ★ Upload field IS EMPTY or HAS VALUE
- ★ Income Data
- ★ Residency Data
- ★ Language Data

Apply Saved View  Add Filters Save View

Select a field and enter the value(s) you would like to filter this list by:

Match ANY ALL of the following conditions

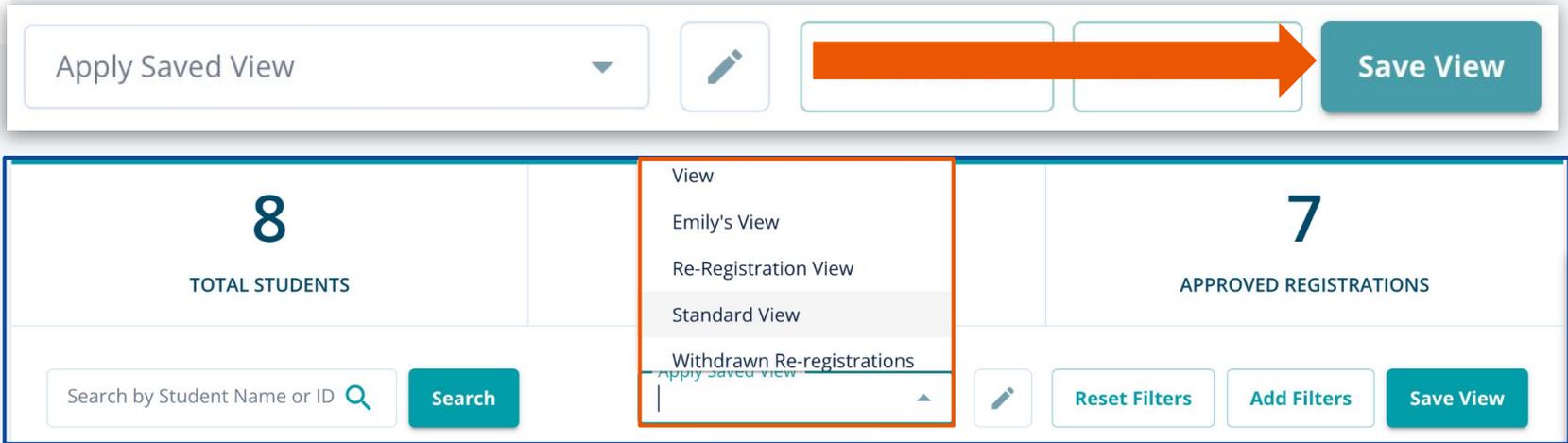
Select Field student_annual.residence_t... ▼	Operator IS NOT ▼	Expected Value PermanentResidence ✕
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Cancel

Apply Filters

Registration: Dynamic Views

You can also create your own dynamic views in the registration module. These views can be kept private or shared globally with your organization. To create a dynamic view, click Save View!



The screenshot displays the registration module interface. At the top, there is a toolbar with an 'Apply Saved View' dropdown, an edit icon, a highlighted 'Save View' button, and a 'Save View' button with an orange arrow pointing to it. Below the toolbar, the main content area shows two summary cards: '8 TOTAL STUDENTS' and '7 APPROVED REGISTRATIONS'. A dropdown menu is open over the '8 TOTAL STUDENTS' card, listing view options: 'View', 'Emily's View', 'Re-Registration View', 'Standard View', and 'Withdrawn Re-registrations'. The 'Standard View' option is highlighted. At the bottom of the main content area, there is a search bar with the text 'Search by Student Name or ID', a 'Search' button, and a 'Save View' button. Other buttons include 'Reset Filters' and 'Add Filters'.

[Click Here: Create Dynamic Views](#)

Saved Views: Use These Saved Views for Your Registrations

- ★ **Withdrawn Registration Forms**
- ★ **Registration Specific View**
- ★ **Re-Registration Specific View**
- ★ **Deliverable View**



Registration:

Resolve Common Issues

Why can't a student register for my school?

Occasionally, a student is unable to register! When this happens it can be for a variety of reasons. As you troubleshoot, check each of the following to ensure everything is in place for the specific student to be eligible to register.

Ineligible to Apply ✕

Based on the information provided your Student is ineligible to apply at this time. Please contact your school for more information.

OK

Registration Submission Dates

The first thing you'll want to review is the registration submission dates. Check to be sure the dates are open for guardians to submit!

[Settings](#) > [Date and Time](#)

School Levels

Add, edit, and delete school levels.Add New Level

Level Name	Grades	Registration Dates	Re-Registration Dates	Actions
PreK Only	PreK3 - PreK	● 03/01/2023 05:30 PM - 03/01/2024 05:30 PM	● 03/01/2023 05:30 PM - 03/01/2024 05:30 PM	 
PreK thru Elementary School	PreK3 - 5	● 03/01/2023 05:30 PM - 03/31/2023 05:30 PM	● 03/01/2023 05:30 PM - 03/01/2024 05:30 PM	 

Note: Admins can submit registration forms even when dates are closed. Additionally, if a registration form is started by an admin on behalf of a student, the form will appear as an active and open registration on the Guardian Dashboard, even when the dates are closed

Lottery Placement

New students are typically only allowed to register if they have accepted an offered lottery seat. If a guardian is attempting to register a student into a school they have not accepted an offered seat to, the student will not be able to register.

[Applications](#) > [Search Student Name or ID](#) > [Edit](#)

Birch Daycare PreK #1 on Offered List

Application Status

Submission	Eligibility
<input checked="" type="radio"/> Submitted	<input checked="" type="radio"/> Eligible
<input type="radio"/> Not Submitted	<input type="radio"/> Ineligible
	<input type="radio"/> In Processing

Submitted On: 
Eastern Time

Lottery Status

Ranking	Status
#1 on Offered List	<input type="radio"/> Accepted
	<input type="radio"/> Declined
	<input checked="" type="radio"/> Pending

Placement History

Note: Determine if this student is offered a seat, if the seat was auto-declined, if the student is on a waiting list or not, etc. If they are on an offered list, make sure that they have accepted their seat in order to continue to the registration process.

Registration Settings

If the dates are open, and the student is Offered and Accepted, you will want to review the school's settings to ensure that they are set up properly

[Settings](#) > [Schools/Programs](#) > [Manage Schools](#) > [Edit](#)

Birch Elementary School: [Edit](#) Cancel Save School

PRIMARY SCHOOL ELIGIBILITY **REGISTRATION SETTINGS** FEEDER SCHOOLS

Registration Grades:

<input type="checkbox"/> Infant Toddler	<input type="checkbox"/> PreK	<input checked="" type="checkbox"/> K	<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	

Registration Dates:

System Default School Specific

Start Date: 01/01/2023 12:00 AM Eastern Time

End Date: 05/01/2023 11:59 PM Eastern Time

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 Specific Dates: A school may have "School Specific" dates selected instead of using the system default School Level registration dates.

School Eligibility Settings

Review the rule and boundaries attached to the school. If a student who lives within the school zone for the school they need to register or re-register to is unable to do so, the boundary file attached to the school may be incorrect!, or a grade may have been missed in the boundary setup

Settings > Schools/Programs > Manage Schools > Edit

Birch Elementary School: [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	

Cancel Save School

Eligibility Rules

If you have verified that the rule that is attached to the school or school group is the correct rule, review the rule in Custom Data to make sure that it has been set up correctly.

Settings > Custom Data > Eligibility Rules/Restrictions

Registration Rule: [Edit](#) Cancel Save Rule

Rule Information

Rule Name*
Registration Rule

Rule Description:
Only students in Accepted status may register at a 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
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Add Condition Add Nested Group

Cancel Save Rule

Why Does My Lottery List Not Match Registrations?

When student registrations are withdrawn, it will not remove the student from the lottery list, or update the student to declined on the lottery list. You can decline a lottery placement, and/or withdraw their application to keep everything in sync.

The screenshot displays the SchoolMint Enroll interface for the 2023-2024 school year. The top navigation bar includes the user name 'Alexis Robin', the current year '2023-2024', and various utility icons. The main header shows 'Student Registrations: 2023-2024'. Below this, three summary cards are displayed: 'TOTAL STUDENTS' with a value of 6, 'SUBMITTED REGISTRATIONS' with a value of 6, and 'APPROVED REGISTRATIONS' with a value of 5. A search bar is located below the cards, with a search button and a 'Search by Student Name or ID' placeholder. To the right of the search bar are buttons for 'Apply Saved View', 'Reset Filters', 'Add Filters', and 'Save View'. A 'Quick Filters' button is also present. At the bottom, there is a message: 'Search, Apply Saved View, or click Add Filters to view Registrations. To display Registrations automatically, add filters to create a new view and save it as the default.' A vertical 'Need Help?' button is visible on the right side of the interface.

CS Demo District | Student Registrations: 2023-2024

Alexis Robin | 2023-2024

SchoolMint Enroll

Dashboard | Students | Applications | Lotteries | Registrations | Reports | Events | Users

Student Registrations: 2023-2024

6	6	5
TOTAL STUDENTS	SUBMITTED REGISTRATIONS	APPROVED REGISTRATIONS

Search by Student Name or ID [Search] [Apply Saved View] [Reset Filters] [Add Filters] [Save View]

Quick Filters

Search, Apply Saved View, or click Add Filters to view Registrations.
To display Registrations automatically, add filters to create a new view and save it as the default.

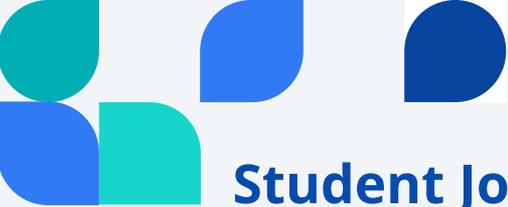
Need Help?



Registration: Reports

Registration Status Reports

Record	Label Displayed	Field Name	Note
Registration	Submitted	submitted	Enrollment form submitted (1 = Yes, 0 = No)
Registration	Submitted Timestamp	submitted_timestamp	Timestamp of when enrollment form was submitted
Registration	Withdrawn	withdrawn	Whether registration is withdrawn (1 = Yes, 0 = No)
Registration	Withdrawn Reason	withdrawn_reason	Reason enrollment was withdrawn
Registration	Withdrawn Timestamp	withdrawn_timestamp	Timestamp of when the enrollment form was withdrawn
Registration	Status	status	Enrollment form approved (-1 = In Processing, 1 = Yes, 0 = No)



Student Journey Reports

Record	Label Displayed	Field Name.	Note
Application	Submitted	submitted	Application form submitted (1 = Yes, 0 = No)
Application	Status	status	Enrollment form eligible (-1 = In Processing, 1 = Yes, 0 = No)
Application	Withdrawn	withdrawn	Whether application is withdrawn (1 = Yes, 0 = No)
Lottery Ranking	Lottery List	lottery_list	
Lottery Ranking	Accepted	accepted	
Registration	Maximum Step	maxstep	Maximum step reached in enrollment process
Registration	School ID	school_id	School to enroll student in
Registration	Submitted	submitted	Enrollment form submitted (1 = Yes, 0 = No)

Contact Data Report

Record	Label Displayed	Field Name	
Student Annual	Guardian 1 Name	guardian1_fname guardian1_lname	Replace “guardian1” with “guardian2” for Guardian 2 data
Student Annual	Guardian 1 Relationship	guardian1_relation	Replace “guardian1” with “guardian2” for Guardian 2 data
Student Annual	Guardian 1 Email	guardian1_email	Replace “guardian1” with “guardian2” for Guardian 2 data
Student Annual	Guardian 1 Phone	guardian1_phone	Replace “guardian1” with “guardian2” for Guardian 2 data
Student Annual	Emergency 1 Name	emergency1_name	Replace “emergency1” with “emergency2” and etc
Student Annual	Emergency 1 Relationship	emergency1_relation	Replace “emergency1” with “emergency2” and etc
Student Annual	Emergency 1 Email	emergency1_email	Replace “emergency1” with “emergency2” and etc
Student Annual	Emergency 1 Phone	emergency1_phone	Replace “emergency1” with “emergency2” and etc



Question: Do you have a custom Flag, Saved View, or Report for Registrations?

If so, share what it is and what it helps you do by typing it in the poll! For example:

"I created a Saved View to easily track my Withdrawn Registrations!"



Answers:

I created a date of submission view for my applications, as that helped me know what new apps were coming in.

MV status

Siblings Flag

I created a Saved View to track who has submitted their registration forms.

locate transcripts

Report for registrations to identify prek students. Helps me see if the students are assigned to a school zoned.

Yes. I like to know if families upload documents. Having a flag helps know who uploads and who doesn't. As well as knowing if they select ELL, IEP, etc...

IEP / 504

EXPELLED

ALLERGIES

MEDICINE ADMINISTRATION

EASY ACCESS TO THE MOST ASKED FOR INFORMATION FROM OUR STAKEHOLDERS.

We have flags for IEPs, 504s, newcomers to help us make sure we have the needed support for the student ready for when they start school

Love my Saved view. I have one for new registration and re-registration.



Q&A

Survey



Q&A

Q: Is there a system setting to NOT ALLOW registrations/applications to be deleted?

A: Yes! You can find this under *Settings > Users > User Groups > Edit* and remove certain user groups' ability to delete applications and/or registrations

SIS Export Preparation

- Efficiently maneuvering through the Sync Service tool
- Exploring the various mapping types
- Configuring reports for smooth data export to your SFTP

April 16, 2024

[Click Here to Register](#)

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THANK YOU!

