SchoolMint Enroll

Registrar 101: Mastering Registration Management

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Meet the Hosts

Alexis Robin
Sr. Professional Services Specialist
Presenter

Lanie Malorin
Customer Experience 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

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

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

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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

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Registration: Launch

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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.

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Registration:
Manage

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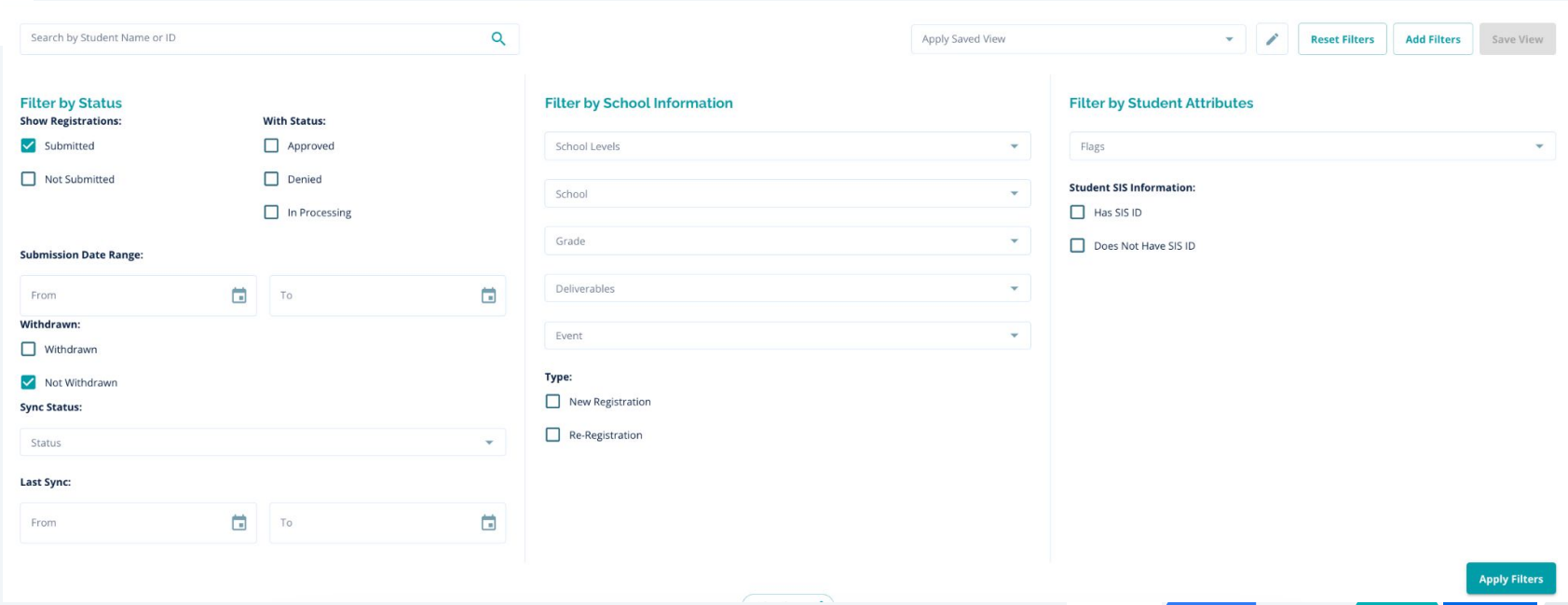
Registration: Filtering

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.



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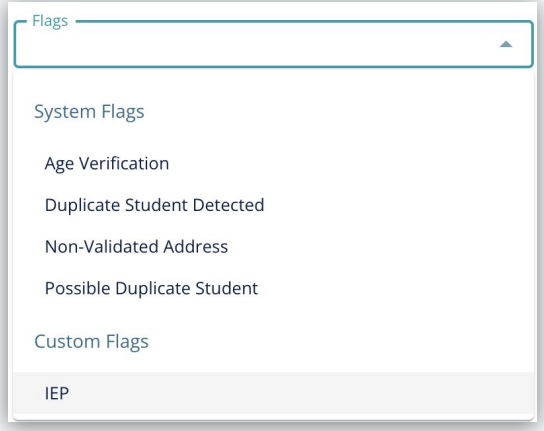
Registration: Flags

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



Click Here:
How do I create a flag?

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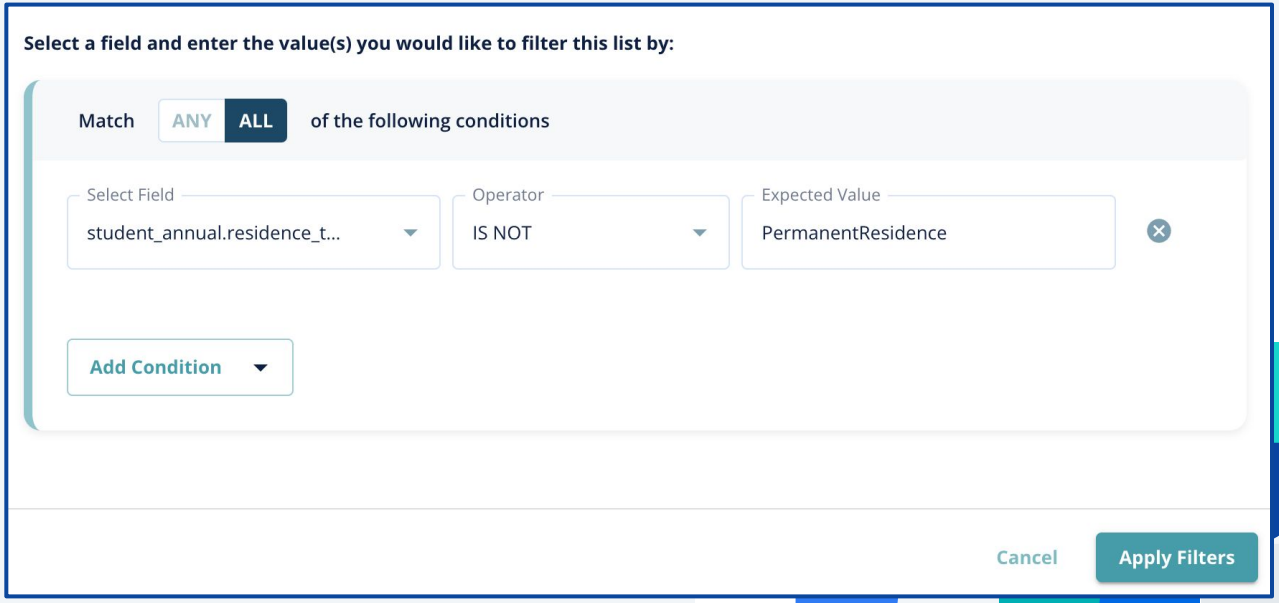
Registration: Custom Filters

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



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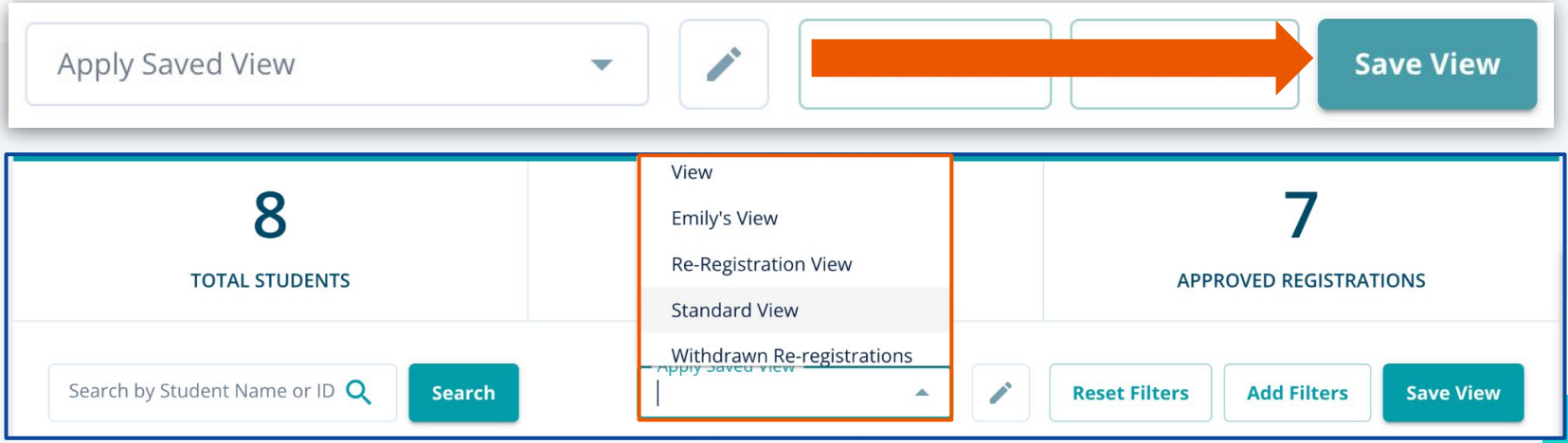
Registration: Dynamic Views

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!



Click Here: Create Dynamic Views

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Saved Views: Use These Saved Views for Your Registrations

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

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Registration:
Resolve Common Issues

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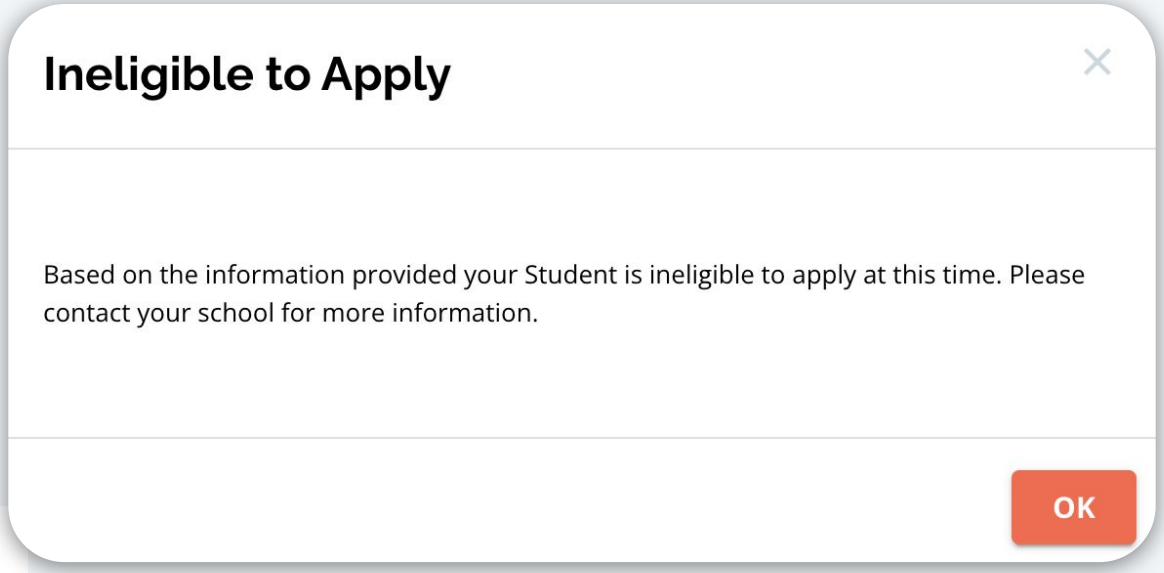
Why can’t a student register for my school?

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.



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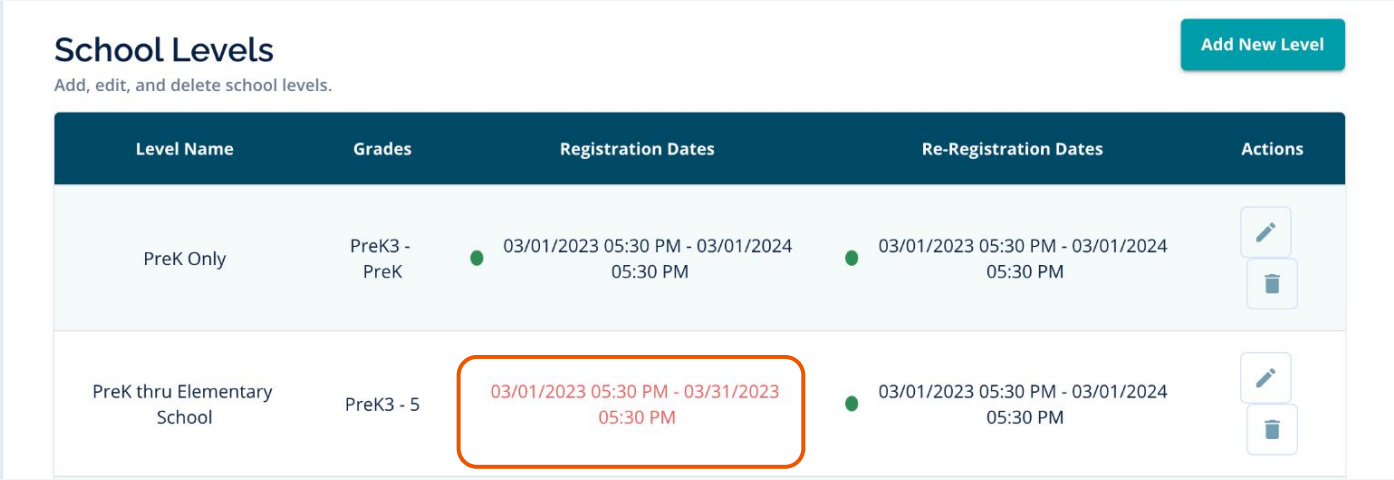
Registration Submission Dates

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



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

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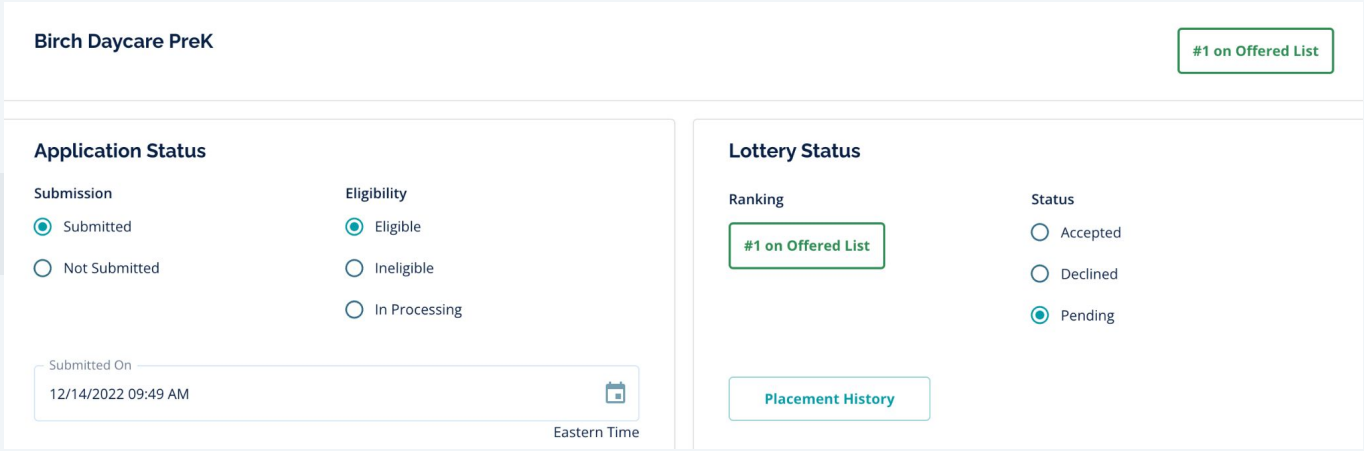
Lottery Placement

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



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.

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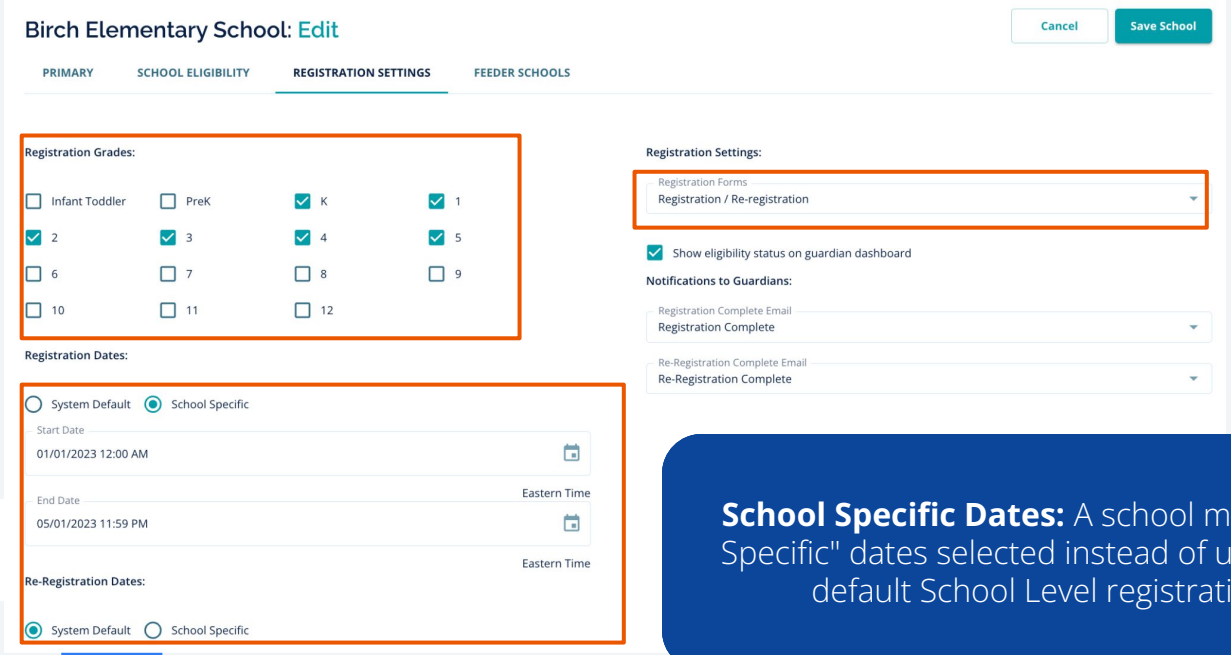
Registration Settings

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



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

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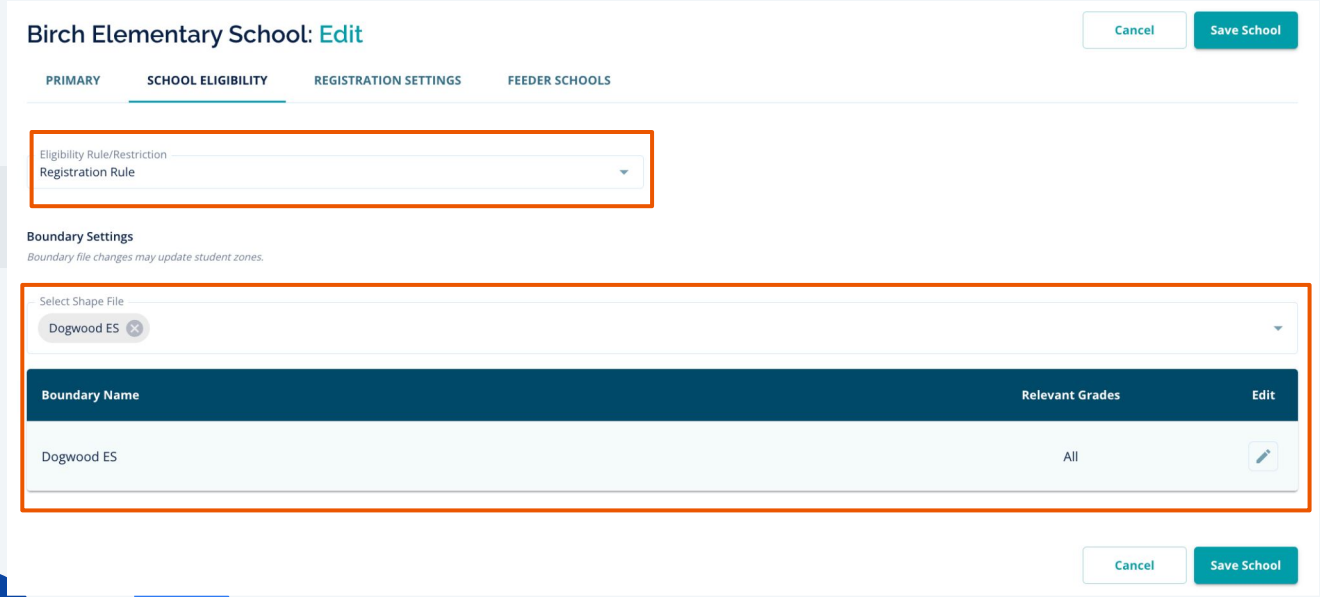
School Eligibility Settings

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



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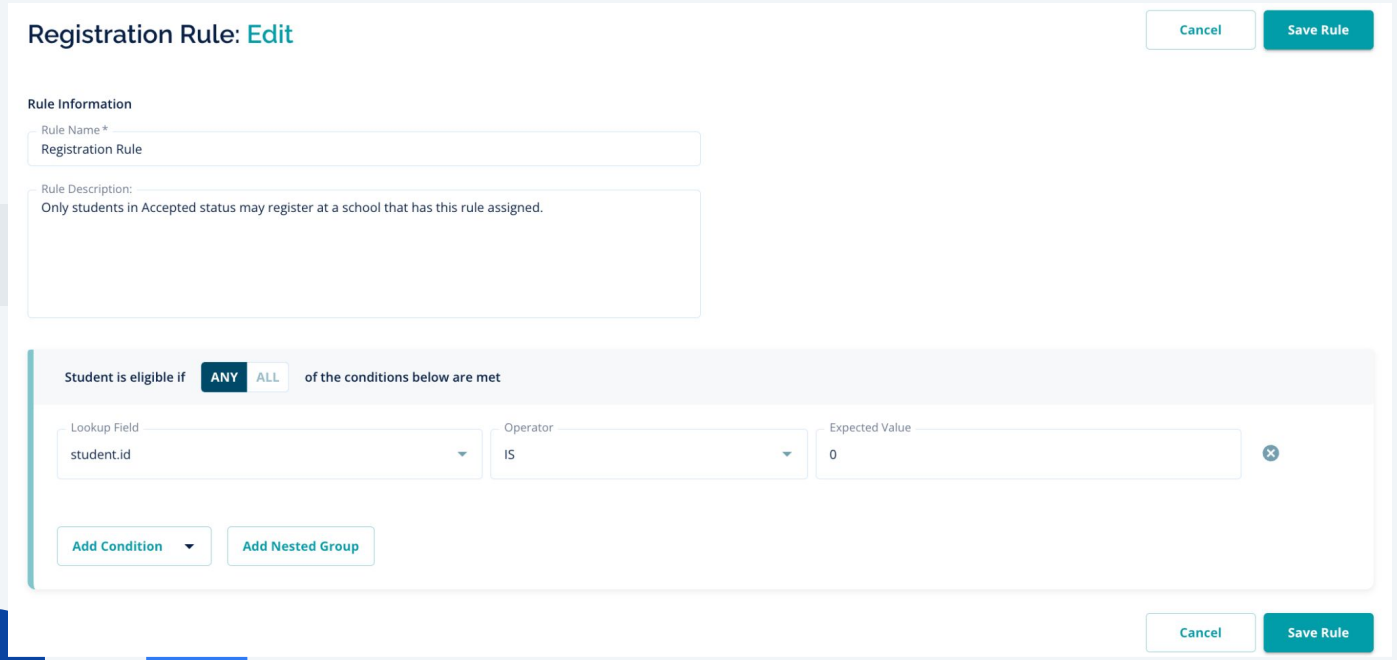
Eligibility Rules

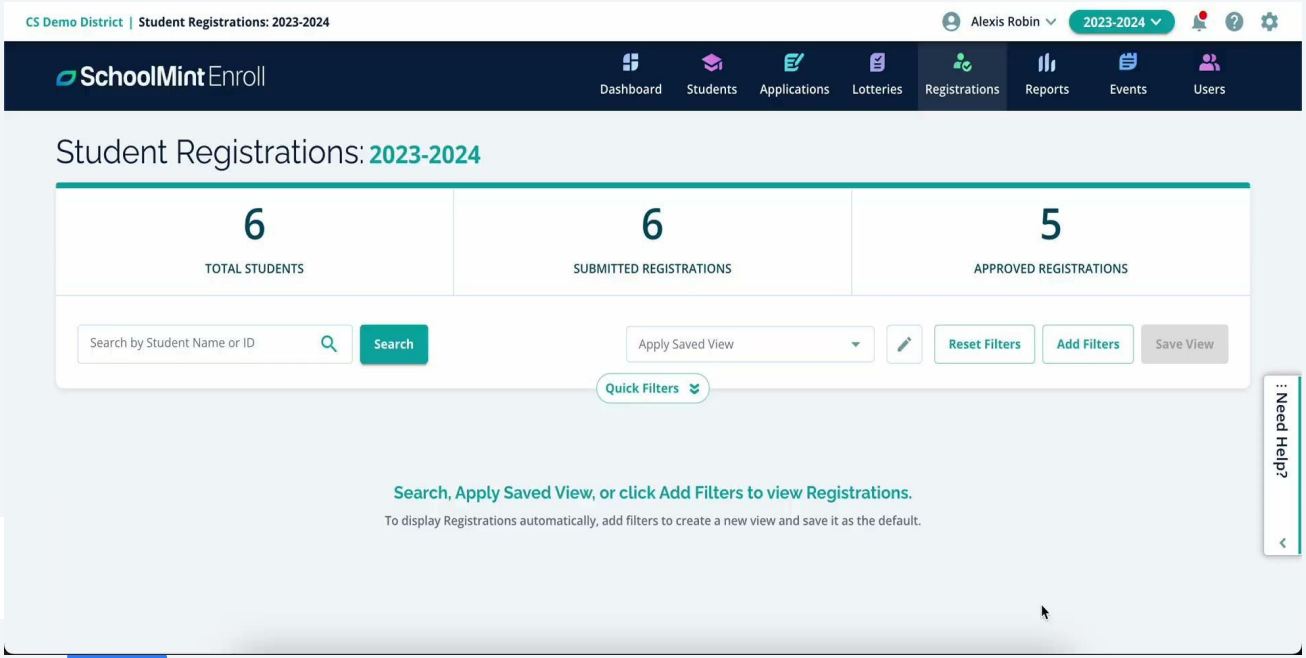
If you have verified that the rule that is attached to the school or school group is the correct rule, review the rule in Custom Data to make sure that it has been set up correctly.

Settings > Custom Data > Eligibility Rules/Restrictions



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.



Registration:
Reports

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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)

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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)

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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

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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!"

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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 transcipts
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 doesnt. 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 STAKHOLDERS.
We have flags for IEPs, 504s. newcommers to help us make sure we have the needed support for the student ready for when the start school
Love my Saved view. I have one for new registration and re- registration.

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Q&A

Survey

SCAN ME

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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**

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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!

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