SchoolMint Enroll

A Beginner's Guide to SchoolMint Enroll: Applications 101

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Welcome to the Summer Series! ⛱️

Get ready for a sunny journey through our Enroll platform 🌞 We're hosting a bi-weekly webinar series from June 11 to Aug 1, designed to help new admins like you navigate with ease.

Each week will dive into a specific topic, making your learning experience a refreshing cool summer breeze 🌴 Plus, every registrant has a chance to win an exciting giveaway at the end of the series! 🎉 Stick around until the end for an opportunity to snag extra entries!

Meet the Hosts

Alexis Robin
Sr. Professional Services Specialist
Presenter

Amanda Heerema
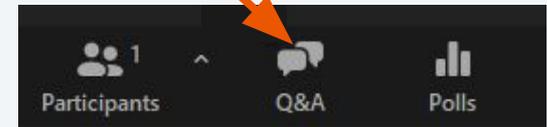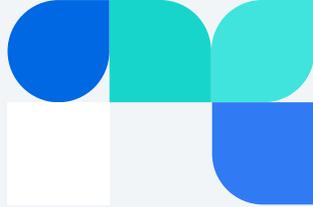**Customer Experience Manager**
Q&A

Logistics

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

Live Q&A throughout:
- **Ask webinar related questions by clicking Q&A**
- **Send site-specific questions to schoolmint.zendesk.com**
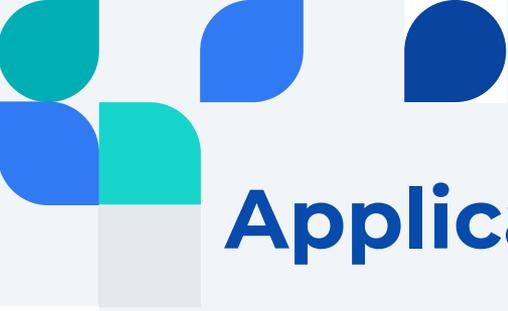
Two Surveys at the end

Today's Goals

- How to Prepare for Applications
- Managing Applications

Applications: The Basics

Application Module in SchoolMint

In SchoolMint, completing and submitting Applications is a process that a family/student completes in order to gain admission or an offer to attend their chosen school. For families who are new to your organization, they will begin their work in SchoolMint by creating a family account. (This includes inputting information for at least one guardian and at least one student.)

An application will typically go through a lottery process to either be given an offer or a waitlisted status, but this may vary based on an organization's process.

Some organizations use other terms for this process, such as admissions, lottery application, or lottery registration.

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SchoolMint Enroll Environments:

Production Environment:
Admin Login: https://{yoursubdomain}.schoolmint.com/manage
Family Login: https://{yoursubdomain}.schoolmint.com

- Real site with Real data
- Share with families
- Changes made to this site will remain

Testing (Sandbox) Environment:
Admin Login: https://{yoursubdomain}.Sandbox.schoolmint.com/manage
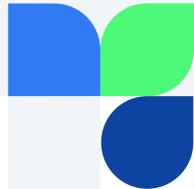**Family Login: https://{yoursubdomain}.Sandbox.schoolmint.com**

- Copy of prod site with a copy of the real data (can be "refreshed")
- Orange banner to indicate the environment
- Used for testing purposes
- **DO NOT** share with families
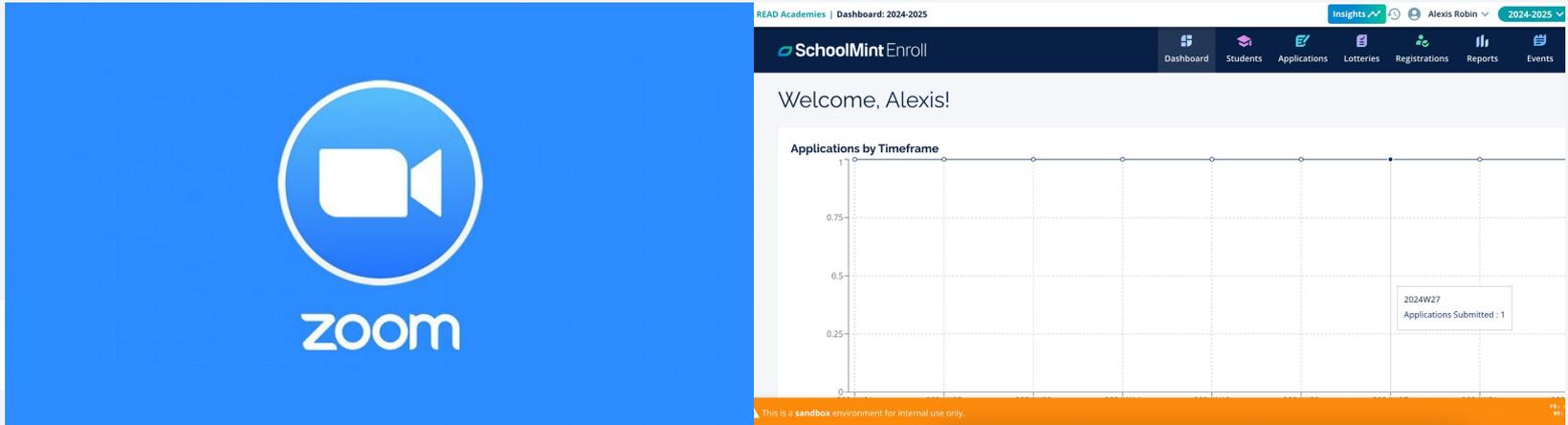- Changes made to this site will remain temporarily until the next requested refresh

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Do Now

Let's get started:

1. Navigate to **{domain}.sandbox.schoolmint.com** and **login**

2. Bookmark **Sandbox**

3. Setup your Virtual Space

Setting up your virtual space

Application:
Prepare

Application: Date & Time

Settings >> Date & Time >> Click to Manage for Each Program Category

- Category Choice Limits (minimum & maximum # of applications allowed)
- Date applications open
- Date applications close
- Allow ranking of choices

Choice: Edit

Cancel | Save Category

Category Information

Category Name *
Choice

Maximum Program Choices per Category *
Unlimited

Maximum Program Choices per Category per School *
Unlimited

Application Dates

Start Date
08/01/2023 12:00 AM
Central Time

End Date
12/01/2024 12:00 AM
Central Time

Options

☑ Allow Applications to be Ranked

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Application: Update text and email templates

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

Email and Text Templates

- ○ Application Complete
- ○ Application Status Change

Read through the list of notifications to see if there are any others you might want to customize / update.

Email and Text Templates
Manage templates used throughout the system.

Note: If you use custom translations, don't forget to review/update those as well!

Search

Type
Application ✕ ▾

Add New Template

	Type	Actions
Application Complete	Applications	✏️ 🗑️

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Application: Program Settings

Settings >> Schools/Programs >> Manage Programs

- Set Application Grades
- Assign Application Form
- Assign Application Notifications
- Dates

Workflow Notifications

Settings > Workflow Notifications

Create your own custom notifications for admins when students meet certain criteria that you set!

Notifications: Add New

This Workflow Notification is For:

Select *
Applications ▼

Primary Settings:

Workflow Notification Name *
Example Notification

Description
This is an example

237 characters remaining

Programs Restrictions *: ⓘ
☑ All Programs

Program Grades Restrictions *: ⓘ
☑ All Grades

Notification Trigger *:

Select a Notification Trigger * ▲

Application was submitted

Application eligibility was updated
(applies to submitted applications only)

Application was withdrawn

Address has changed

Custom Trigger

Try out our Workflow Notifications!

Click Here to Learn More

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Application: Test at least 3-5 times in Sandbox Site

To test:

- Submit a Zendesk ticket or CX email request for a "Sandbox Refresh"
- Go to your Sandbox site
  https://{domain}.sandbox.schoolmint.com/manage
- Ensure application dates are open
- Visit the Login or Sign Up Page:
  https://{domain}.sandbox.schoolmint.com
- Create a test guardian profile and go through the application flow!

Click here:
Testing Applications

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Practice: DEMO

1. Set Open & Close Dates for a Program Category
2. Update the Application Complete email template with a dynamic variable, and assign it to a program
3. Create a workflow notification for withdrawn applications

Quiz 1: If I want an administrator to be notified about a student submitting an application, where can I add their email?

A. In the Program Category settings

B. In the Program settings

C. In Workflow Notifications settings

D. In either the Program or Workflow Notifications Settings

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Application:
Launch
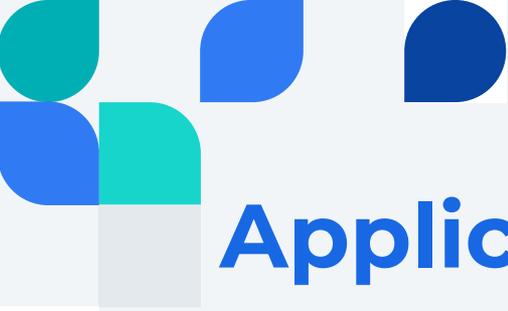
Application | Launch

- Have you done all of the Prepare steps?
- Double check your calendar dates and times.
- Make sure the Sign Up page URL is accessible to families: https://{domain}.schoolmint.com/signup

Ready for Launch!

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Applications:
Manage

Application: Statuses

✳ **Eligible**

✳ **Ineligible**

✳ **In Processing**
(default status)

Application Module: Filtering Applications with Quick Filter

Student Applications

Filter by Status

Show applications:

- ☑ Submitted
- ☐ Not Submitted

With Status:

- ☐ Eligible
- ☐ Ineligible
- ☐ In processing

Submission Date Range:

From 📅	To 📅

Withdrawn:

- ☐ Withdrawn
- ☑ Not Withdrawn

Lotteries:

Lottery List ▾	Lottery Status ▾

Filter by Application Attribute

Form Process	▾

School	▾

Grade	▾

Category	▾

Program	▾

Priority	▾

Filter by Student Attributes

Student Name

Flags	▾

Click on **Apply Filters** to view applications based on your selected filters

Clear All Filters | **Apply Filters**

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More on Applications: Bulk Actions

Bulk Actions ▼   61 / 61 Selected

| ☑ | 🏳 | | ull Name ▲ |

Send Email/Text Message

Update Application Status

Download Forms/ Attachments

Export

☑   Aardvark, Andrew

☑   Aardvark, Andrew

Select at least 1 record to perform a bulk action.

Application: Editing a Student's Application

View or edit the application details by clicking the record's pencil icon.

[person icon] [pencil icon] [document icon]

[trash icon] Withdraw   [download icon] 🚩 View Flags   View ▼   Go to Student Profile

Only **Admins with Edit Access** will be able to edit the Applications for students associated with their assigned school or program.

From here you can manage things like:

- Statuses
- Priorities
- Form Information
- Change & Communication Logs

🎓 **Amy Apple**

Student ID: 2060317 | **Merge Records** ⓘ

SIS Student ID

Application to:

Magnolia Elementary Transformation

Application Status

Submission   **Eligibility**

⦿ Submitted   ◯ Eligible

◯ Not Submitted   ◯ Ineligible

                                  ⦿ In Processing

Application Form

1. Student Info ✓

2. School Selection ✓

3. Review and Send ✓

First Name *
Amy

test field description

Last Name
Apple

Transportation

☐ BUS

☑ FAMILY

☐ BIKE

☐ WALK

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Application: Change & Communication Logs

See records of all the changes and communication history within the application by clicking the "View" dropdown

🗑️ **Withdraw** ⬇️ 🚩 **View Flags** **View** ▾ **Go to Student Profile**

View Change History

Communications Log

Application Change History ✕

🎓 **Bennet, Elizabeth**   Birthdate: Grade: Guardian(s)
02/02/2019   K   No associated guardian accounts

Search 🔍   After This Date 📅   Before This Date 📅   **Apply Filters**

Date & Time	User	Change Logs
⌄ 06/25/2024 10:54:22 AM	Alexis Robin	3 Changes

(3) Change History

Field	Original Value	New Value
application.status	1	0
application.status_timestamp		06/25/2024 10:54:22 AM

Application Communications Log

🎓 **Erye, Jane**   Birthdate: Grade: Guardian(s)
09/09/2012   7   2553127: Jane Reed

Sent On	Sent To	Type	Automated	Subject	Status	
6/6/2024 3:50:00 PM	Jane Reed	Email	N	test	Opened	View ▾
6/6/2024 3:50:00 PM	Jane Reed	Text Message	N	test	Delivered	View ▾

Practice: DEMO

1. Filter for Submitted + Not Withdrawn Forms
2. Bulk select all applications and update to Eligible
3. Access the Edit area of an individual application
4. Update Guardian 1's phone number
5. Update the application status to Ineligible
6. Add a note to the application
7. Review the Change Log

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Quiz 2: What is the minimum amount of applications I need to select to complete a bulk action?

A. **At least one**

B. **At least two**

C. **At least five**

D. **All of them**

Summer Webinar Series

A Beginner's Guide to SchoolMint Enroll

We are excited to announce a comprehensive webinar series designed to equip new administrators with the fundamental skills needed to effectively navigate and manage their SchoolMint Enroll platforms. This series will be hosted every other week from **June 11 - August 1**, each week focusing on a single topic.

- ~~**Week 1: Form Building**~~
- **Week 2: Application 101**
- **Week 3: Saved Views and Reports**
- **Week 4: Communications**

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Click Here to Register

Extra Entry Opportunity
Application 101 Homework

Homework:

Join the Discussion on Seamless School Applications and Enrollment!

1. Go to the **Zendesk Portal**.
2. Find the **Community** section
3. Select **Customer Forum**.
4. Look for the post titled **"Tips and Tricks for Seamless School Applications and Enrollment"**.

Share your insights and learn from fellow admins!

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Q&A

Survey

SCAN ME

bit.ly/4eAsL0N

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Q&A

Q: Can Program categories be added as a column in our Application Management screen?	A: The Program Category should be a column in your Standard Saved View. If you create a saved view using that first, you should see it as an option to add to others!
Q: Is applicaiton status change messge that should go out When an offer is made? Or shoudl we create a seperate email for offers made after the lottery? Woudl lvoe to hear best practices on that.	A: This is a different email! Application Status Change Email is directly related to their application status, while lottery emails are found and managed separately.

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Admin Resources

Zendesk

Help Articles

Webinar Calendar and Resources

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

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THANK YOU!

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