



SchoolMint Enroll

**Seamless Transition:
Your Platform Rollover Simplified**



Meet the Hosts



Alexis Robin
Sr. Professional Services Specialist
Presenter



Walter Lopez
Sr. Customer Experience Manager
Q&A



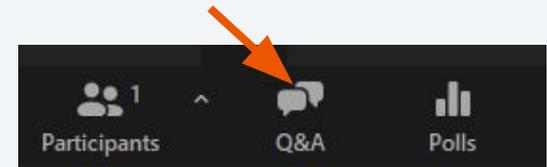
Logistics



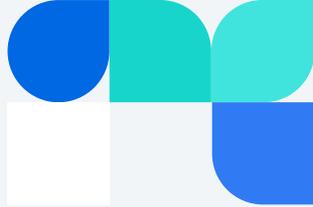
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

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



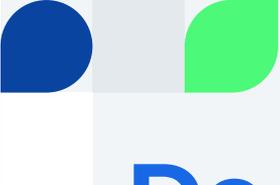
Two Surveys at the end



Today's Goals

- Understand transition process between enrollment cycles
- Review Rollover settings
- Minimize disruptions and maximize efficiency

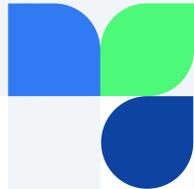




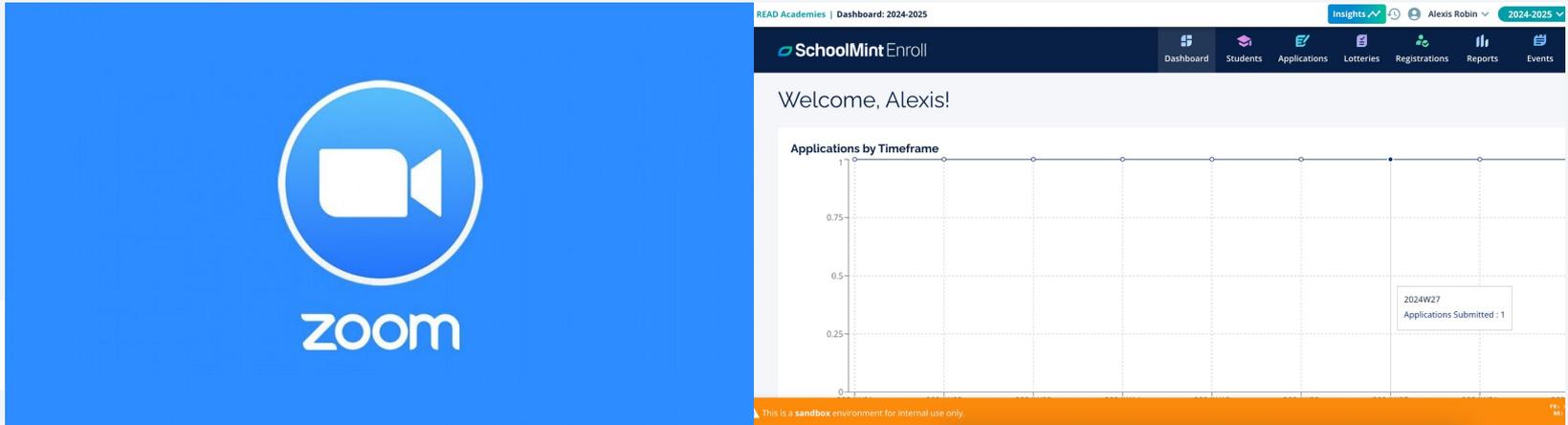
Do Now

Let's get started:

1. Navigate to **`{domain}.sandbox.schoolmint.com/manage`** and **login**
2. Setup your Virtual Space



Setting up your virtual space



The image shows a screenshot of the SchoolMintEnroll dashboard. On the left, there is a large blue square containing the Zoom logo. The dashboard itself has a dark blue header with the SchoolMintEnroll logo and navigation tabs for Dashboard, Students, Applications, Lotteries, Registrations, Reports, and Events. The main content area displays a 'Welcome, Alexis!' message and a line chart titled 'Applications by Timeframe'. The chart shows a single data point for the week of 2024W27 with 1 application submitted. A footer note indicates this is a sandbox environment for internal use only.

READ Academies | Dashboard: 2024-2025

Insights ✓ Alex Robin 2024-2025

SchoolMintEnroll

Dashboard Students Applications Lotteries Registrations Reports Events

Welcome, Alexis!

Applications by Timeframe

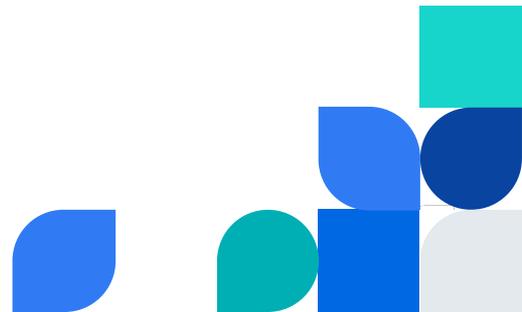
Timeframe	Applications Submitted
2024W27	1

This is a sandbox environment for internal use only.



Poll: Who has run a Roll Over before on their Enroll platform?

- A. I have run one Roll Over so far!**
- B. This is going to be my first year!**
- C. I have run more than one Roll Over!**





Roll Over: The Basics

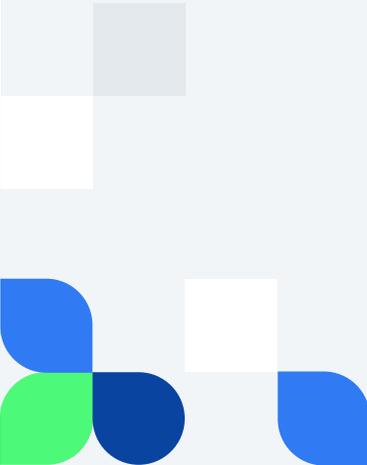




What is Roll Over?

Roll over is the process that is utilized to create a new school year in the Enroll platform. During this process, all of the year-specific information from the current year is copied to the next year. This includes all setup (like schools, programs, and forms), students, and more!

This helps with ensuring that historical data is stored. For example, a student's address may change from one year to the next. With year-specific data, we are able to store their original address in one school year, and then when the new school year is created with the roll over, new address data can be captured! Admins can flip between those school years in order to see old and new data at any time.





What should I keep in mind throughout the roll over process?

- The roll over is a one-time process per year and should occur when it is time to begin making changes to open up the new school year to parents.
- The roll over will copy all of the data listed below from the current year into the next year.
- No data entered in the previous year will copy over to the next year **AFTER** the roll over process is complete. Data only copies from one school year to the next when it is already part of the school year **BEFORE** the roll over process begins.



What Data Rolls Over?

Students (grades incremented by 1)

Custom Fields

Events (not sessions)

Sibling designations/associations (sibling grade incremented by 1)

Form processes (including translations)

Annual program & school settings

Form process associations

Date settings (incremented by a year)

Annual school settings

Registration dates (incremented by a year)

Lottery setup

Waitlisted students (when enabled)

What Data Doesn't Roll Over?

**Registration
Records**

Event sessions



Current school for a student is updated based on approved registrations, meaning that if a student has an APPROVED registration form, the school that registration is for will be set as their current school (school_previous_id) in the new year.

**All signature
fields**

**Any form fields
set to clear on
rollover**

Remember:

All data from previous school years will remain accessible using the school year drop-down at the top right of the screen. No data will be removed from existing school years during this process.

2024-2025 ▾

School Year

2023-2024

2024-2025

Running the Roll Over



Have you done all of the PREPARE steps?

Ensure all data is in the current year

- If you have any data in your form process that you do not want to copy to the next year, then enable the "Clear on Roll Over" checkbox on that specific field.

Be in the latest school year

- For example, if you are ready to roll over to the 2024/2025 school year, you will need to be in the 2023/2024 school year.

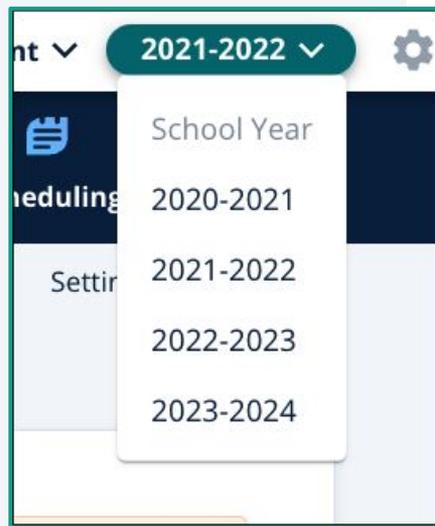
Verify all settings are up to date

- User permission access is available
- Global Lottery Settings have Roll Over Waiting List enabled

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To run the roll over process, you must be in the latest year available for your organization!

- In these example screenshots, you'll see the latest (or most recent year) available is 2023-2024.
- In this example, the system must be in the 2023-2024 school year in order to run the roll over.



You must be in the latest year **2023-2024** context to run the rollover process.

Step One: Roll Over

- Navigate to the **Settings** page
- Click the **Roll Over** tab
- Type **“rollover”** (in all lower case) in the text box to verify you would like to start the roll over.
- You will **receive an email** once the roll over process is complete. **Refresh** the page to see that the roll over is complete.

If there is a system **error** during the roll over process the service will set the status to **failed** and will allow the roll over to run again. The system will only run the portions that failed

This process will copy all of your setup from the 2022-2023 school year to the 2023-2024 school year.

- Once the rollover is complete, any subsequent changes that you make to the setup of the **2022-2023** school year will not be reflected in the **2023-2024** school year.
- Student grade levels will be incremented by one grade level, unless “Retained” or “Skip a Grade” is selected.
- If you set your programs to roll over their waiting lists, those waiting lists and applications will carry over to the **2023-2024** school year.
- All of your data from the **2022-2023** school year will remain accessible through the school year drop-down menu at the top right of the page.
- Remember to double-check your default year in the “Date & Time” settings area after the rollover process is complete.

Type “rollover” to proceed with running the rollover process

Type “rollover” to proceed
rollover

Start Roll Over

When Should I Roll Over?

We recommend giving yourself **at least two weeks** to do all the prepare steps, roll over, and complete any changes needed before opening your next school year, however this can vary by organization depending on what is needed.

Another thing to consider is if you have Registrations, you may want to do this after you have **closed Registrations** and **processed all Registrations**. This is because new students who are in an **Approved** status will automatically roll over as **Returning**. Students still In Processing, or who have not submitted a Registration **at the time of Roll Over** will still be marked as **New** in the new year.

- However, if you have **overlapping** open form dates from the previous year and the new year, you will most likely just need to keep track of those students accordingly - consider using **Workflow Notifications** to keep track of those students.

Build a Workflow Notification

Practice:

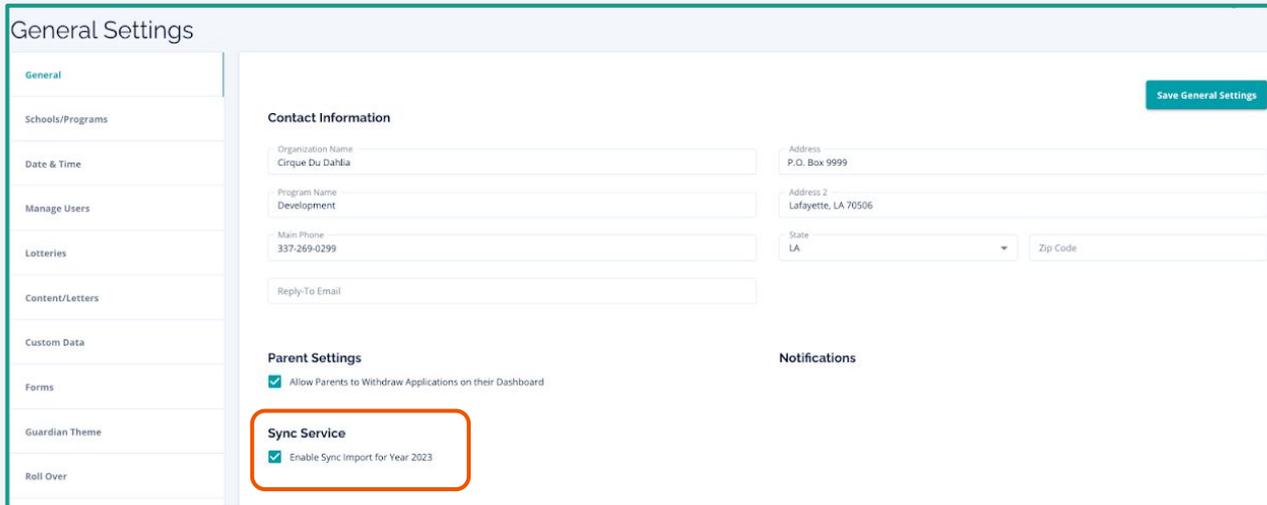


1. Ensure you are in the most current school year on Sandbox
2. Go to Settings > Roll Over
3. Type **rollover** and click **Start Roll Over**

Step Two: Sync Service

By default, the Sync for the new year is OFF. Right before you run the roll over for their SIS, you can turn off the sync for all years in Enroll. After the SIS roll over is complete, the settings in Enroll can be updated so that the SIS sync for the new year is enabled.

Settings > General



General Settings

General Save General Settings

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Contact Information

Organization Name: Cirque Du Dahlia

Address: P.O. Box 9999

Program Name: Development

Address 2: Lafayette, LA 70506

Main Phone: 337-269-0299

State: LA

Zip Code:

Reply-To Email:

Parent Settings

Allow Parents to Withdraw Applications on their Dashboard

Sync Service

Enable Sync Import for Year 2023

Notifications

Step Three: Date & Time Settings

All date settings will automatically be incremented by one year. In the new school year, you can fine-tune the dates to be exactly what is needed for that year. This will apply to application and registration open/close dates, grade birthdate ranges, and more.

Manage Schools & Programs

- General
- Schools/Programs**
- Date & Time
- Manage Users
- Lotteries
- Content/Letters

Open Enrollment: [Edit](#)

Category Information

Category Name *
Open Enrollment

Category Choice Limit
2

Limit Per School
1

Application Dates

Start Date
11/01/2021 10:50 AM
Mountain Time

End Date
11/30/2024 05:25 AM
Mountain Time

Options

Allow Applications to be Ranked

[Cancel](#) [Save Category](#)

"Global" vs "Year-Specific" Settings

- **Year-specific** describes functionality that can be configured differently in each year without impacting other years in your system.
- **Global** describes functionality/configurations that remain the same across all years in the system. When you update a global item in 2023, it will also be updated in 2022 and 2024.

When describing how data is stored/handled in Enroll, you will see the term annual. Annual data is stored separately each year to allow the system to capture unique data each year that has the potential to change.

Step Four: Make Year-Specific Edits

Perform the necessary yearly edits to programs, schools, form processes, etc. to prep for the new school year and launch to parents.

Form Building 101

**Reviewing School and
Program Settings**

Step Five: Make Global Edits

If you need to change the logic or language of a global item that spans across all years (changing the logic of flags, lottery designs, lottery priorities, email templates, eligibility rules, custom data sources, etc.), we recommend that you:

1. **Make a duplicate** of the item in the new enrollment year
2. Re-name it/label it with the **new school year**
3. **Change** the logic or language
4. **Save**

This best practice will preserve the original logic/language that is being used in prior years while allowing you to create an updated version of the item for the new year.

Practice:



1. Go to Settings > Manage Lotteries > Lottery Designs
2. Create a Duplicate of a Lottery Design
3. Replace the word **Copy** in the title with **2025**
4. Click **Save Duplicate**
5. Navigate to Settings > Schools/Programs > Manage Programs > **Edit** a Program
6. Under Lottery Settings, change your Group Design to the new one

Step Six: Update Cutoff Numbers

Lottery cutoff numbers are **set to 0 by default**. These cutoff numbers should be adjusted accordingly for the new year. This step should be completed as part of the lottery prep and does not necessarily need to be completed immediately after the roll over. However, it is important to understand that the roll over does clear out any cutoff amounts that had been put in place in the previous school year.

Manage Lotteries

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries**
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Roll Over

Lottery Cutoff Numbers

Cancel Save All Cutoff Numbers

Tell us how many seats you would like to fill in the lottery.

Select One or More Programs
QAA Parent Apply Flow Program... School Level Program Categories Apply Filters

QAA Parent Application Flow School Level: Open Enrollment

QAA Parent Apply Flow Program - Active

Grade	Group	Cutoff Numbers	Current	Available
PreK3	General Lottery	0	0	0
PreK	General Lottery	0	0	0
K	General Lottery	0	0	0

Step Seven: Event Sessions

If your site is using scheduling, your events will roll over to the new year, but all sessions will be removed as these will likely not apply in the new school year. New sessions for all relevant events in the new year should be created.

Scheduling

Cancel Save Event

Event Details

Session(s)

RSVP Settings

Assign to Programs/Schools

Café Artist: Session(s)

All Times Mountain Time

Import CSV
Add Session

Start	End	Location & Details	Capacity	Actions
01:00 PM on 2021-12-01	02:00 PM on 2021-12-01		25	 

Step Eight: Updating Default Year

When the time is right, typically after form/program/school updates and the SIS roll over process is complete, update the default year and adjust parent access.

Note: If you are syncing data from the SIS, you will need to turn on parent access for that year. (Subject to change through future development.)

The screenshot displays the 'Date & Time' configuration page in SchoolMint. On the left is a navigation menu with options: Date & Time, Manage Users, Manage Lotteries, Content/Letters, Custom Data, Forms, Workflow Notifications, Guardian Theme, and Roll Over. The main content area is divided into several sections:

- Application Dates:** A button labeled 'Click to Manage for Each Program Category'.
- Registration Dates:** A button labeled 'Click to Manage for Each School Level'.
- Timezone:** A dropdown menu labeled 'Select Timezone' with 'Eastern Time (e.g. New York)' selected.
- School Years:** A table with three columns: Default, School Year, and Parent Access.

Default	School Year	Parent Access
<input checked="" type="radio"/>	2023-2024	<input checked="" type="checkbox"/>
<input type="radio"/>	2024-2025	<input type="checkbox"/>

Final Step: Test, don't guess!

Request a Sandbox Refresh by submitting a ticket to Zendesk, and thoroughly test all processes from both the Parent end AND Admin end of the platform to ensure everything is working as expected and is up-to-date for the new school year.

Test Your Applications

Test Your Registrations

Q&A

Survey



bit.ly/3WITEhU

Q&A

Q: Is it possible to NOT roll over student profiles?

A: No, student profiles exist globally, so we do not have the ability to not copy their student data over into the next year

Q: Can I update retained/skipped a grade in bulk?

A: Yes! You can use an adhoc import! Ensure that `students.id`, `students.fname`, `students.lname`, `students.dob`, are in the CSV file, and then add a column for `student_annual.retained = 1` or `student_annual.promoted = 1`

Q: What is the typical timeframe before opening next year applications that I should roll over

A: We recommend giving yourself at least two weeks to do all the prepare steps, roll over, and complete any changes needed before opening your next school year, however this can vary by organization depending on what is needed

Q: Why does X field not have the ability to update the "Clear on Roll Over" option?

A: This is most likely due to the field being saved to the Student record and not Student Annual. You would not want data saved to the Student record to clear on roll over due to it existing globally (for example, if we cleared Student First Name, then it would clear it for all years), so we have removed the option to clear those fields on roll over to avoid those errors

Q: How late do we need to turn off the sync service student import before the rollover?

A: You can do this right before roll over! We just recommend having it off while the roll over is taking place, so if you want to turn off a few minutes before you run the process, that is totally fine!

Q: If we set a field to clear on rollover last year when we did our first rollover in Enroll, will that remain as cleared for our next rollover period?

A: It should, but we still recommend checking those "Clear on Roll Over" settings regardless to make sure!



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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Thank you!