



SchoolMint Enroll

**Form Fusion: Building Dynamic
Application Forms**



Meet the Hosts



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Presenter



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Q&A



Logistics

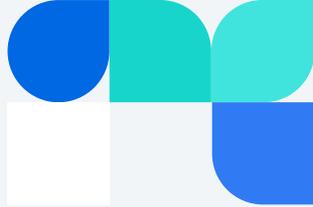


Slides, recording, and related resources will be shared in the follow up email tomorrow

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

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





Poll: What is most important to you when collecting application forms?

- A. Ensuring accurate and complete student information**
 - B. Simplifying the application process**
 - C. Providing clear instructions and guidance to applicants**
 - D. Making it user-friendly for guardians and students**
- 

Application Module: The Basics



What is a Form?

Forms are one of the most crucial parts of the Enroll system. They are the driving force behind the student placement process and are the feature that guardians directly interact with the most. The foundational setup of the Enroll system is geared entirely towards allowing forms to be built and utilized for student enrollment.

Charter School Application: 2024-2025

1. Student Information ✓	<h3>Student Information</h3> <p>1/7</p> <p>First Name *</p> <input type="text" value="Alexis"/> <p>Middle Name</p> <input type="text"/> <p>Last Name *</p> <input type="text" value="Robin"/> <p>Birthdate</p> <p>MM * <input type="text" value="07"/> DD * <input type="text" value="28"/> YYYY * <input type="text" value="2014"/></p>
2. Guardian Information ✓	
3. School Selection 🕒	
4. Siblings	
5. Recommendations	
6. Signatures	



Questions to Consider While Editing

Prior to the start of each new application season, we encourage you to review your application form with an eye toward the following questions:

- What packets did I give parents when I used paper forms?
- What do I need to know about students who are applying to my school(s)?
- What information determines if a student is eligible to be run in a lottery?
- What question are required/do I need for reports?

How do I access forms?

To access the form builder to view, create, and edit forms, you must be a part of a user group that has the "Manage Forms" user permission enabled.

Settings

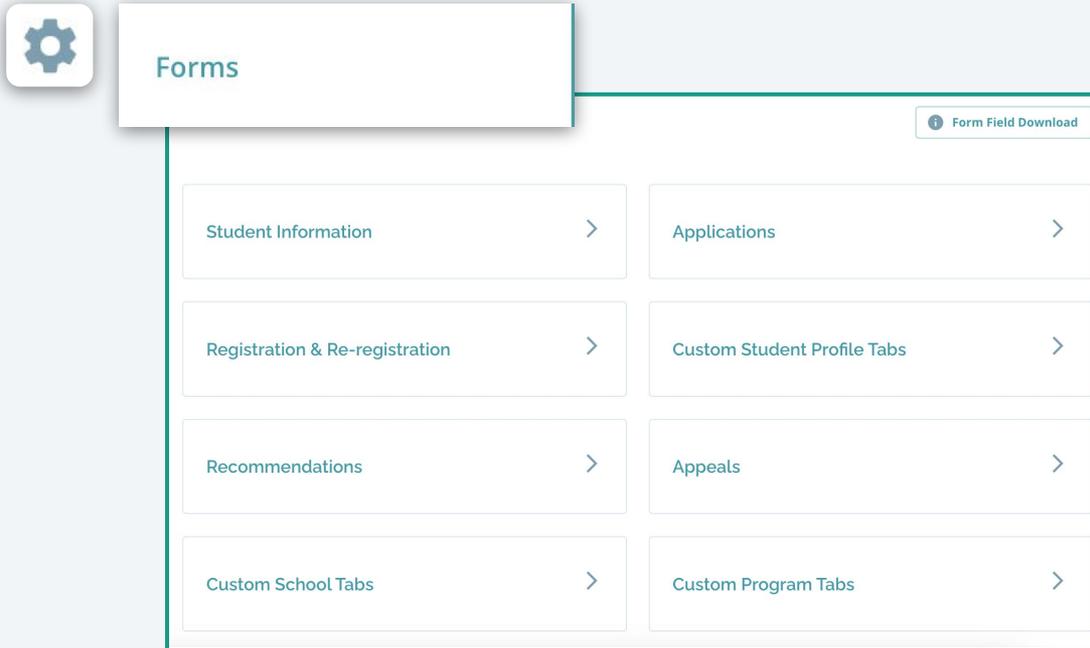
-  Schools / Programs
-  Lottery
-  General
-  **Manage Forms**
-  Content & Letters
-  Custom Data
-  Roll Over
-  Manage Theme

Users > User Groups & Permissions > Edit



How do I find forms?

You can access Forms in Enroll by going to Settings and finding the "Forms" option in the sidebar on the left.



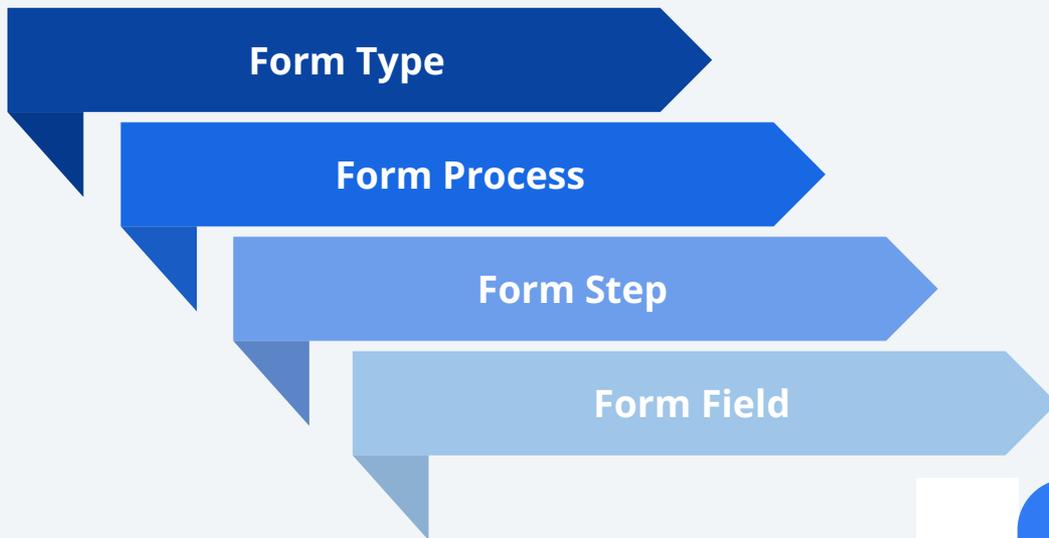
Parts of a Form



How are forms structured?

All forms are structured following the same basic foundation that includes form types, form processes, form steps, and form fields.

The form a user interacts with is made up of form fields which are housed within form steps. These two pieces come together to create the full "form process" which is the overall form that a user submits. This form process is then categorized into a form type.



How are forms structured?

Product Learning Enablement | Welcome: Caitlin Mayer 2024-2025 | Dashboard | Messages | English | Caitlin Mayer | 2024-2025

- Re-Register at Your Current School
- Register to Your Neighborhood School
- Form Type** → Apply to More Schools
 - Charter School Application **Start**
 - School Choice Application **Start****Form Process** →

Application: 2024-2025

Form Step →

1. Student Information ✓
2. Guardian Information ✓
3. School Selection ⚠
4. Siblings
5. Recommendations
6. Signatures

Student Information 1/7

First Name *
Alexis

Middle Name

Last Name *
Robin

Birthdate
MM * 07 DD * 28 YYYY * 2014

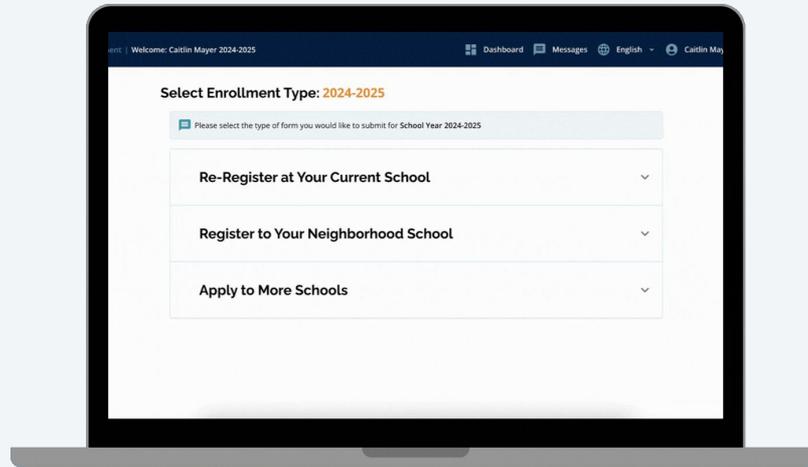
Form Fields →

Save & Exit Save & Continue >

Application Form Type

The Applications form type will house all application form processes. In Enroll, application form processes are the forms that guardians must complete and submit in order to qualify to run in and be placed in the lottery.

Submitting an application will create one application per program applied to in the application form Selection Step.



Forms

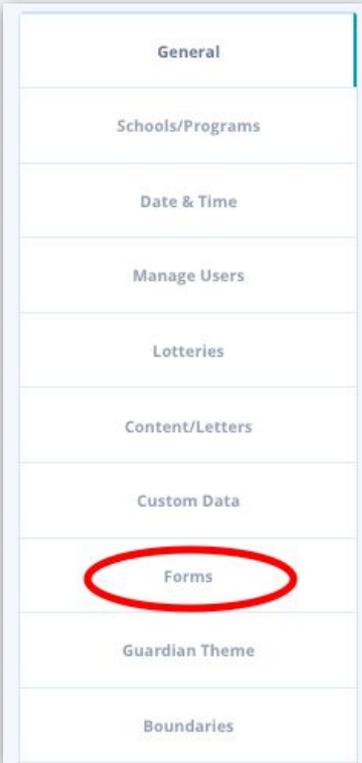


Application Forms: Editing a Form

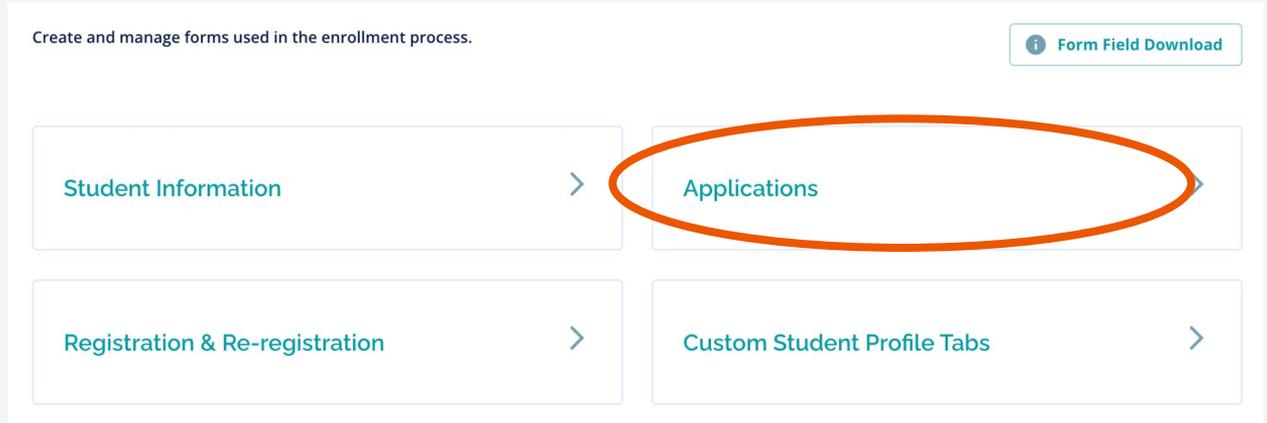
In **Settings**



click on **Forms**.



From the **Manage Forms** page, click on **Applications**



Form Settings

Settings > Forms > Applications > Edit



Lottery Application

Form Process

[Manage Steps](#)

Lottery Application: Edit

Cancel

Save Process

Process Parameters

Form Process Name*
Lottery Application

Maximum Program Choices*
Unlimited

Minimum Program Choices
2

Maximum Program Choices per School*
Unlimited

Options

- Allow Applications to be Ranked
- Separate Category Rankings
- Disable Application Ranking Changes After Submission
- Enable Student Lookup
- Enable Neighborhood School Banner
- Enable Appeals

Content Snippets & Translations

EN ES

Requirements and Policies:

← → Paragraph **A** **B** *I* U [List icons] [Table icon] [Link icon] [Image icon] [Omega icon] [Play icon] *It* [Eye icon] [Info icon]

Student Lookup

Settings > Forms > Applications > 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

Neighborhood School

Settings > Forms > Applications > Edit 

Options

- Enable Student Lookup
- Enable Neighborhood School Banner

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!](#)

 This is your neighborhood school

1 Program(s) Selected 

Charles Dickens Elementary

Address: 801 Mudd Ave, Lafayette

Distance: 4.79 mi [See Map](#)

Grades: K to 5

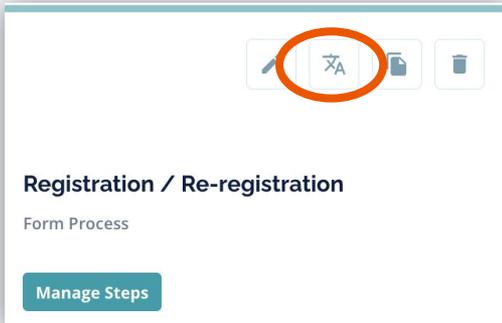
Select Program(s) to Apply:

Choice

- Charles Dickens Elementary

Translate Your Form

Settings > Forms > Applications > Translate 



Registration / Re-registration
Form Process

[Manage Steps](#)

Translate: [Registration / Re-registration](#) [Cancel](#) [Save Translations](#)

ES

English	Spanish
Registration / Re-registration	<input type="text" value="Translation"/>

Choose a form step:

Student Information Get Started ^

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

Steps



Step Management

Settings > Forms > Applications > 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

Lottery Application

Form Process

Manage Steps

Lottery Application Steps

Back to Processes

Add Form Steps

Manage Form Steps

1	=	Student Information	Manage Fields	  
2	=	Guardian Information	Manage Fields	  

Step Settings

Settings > Forms > Applications > 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

Advanced Restrictions

Configure Advanced Restrictions

Content Snippet & Translations

EN ES

Paragraph A B I U [List icons] [Table icon] [Link icon] [Image icon] [Omega icon] [Play icon] [Text icon] [Eye icon] [Help icon]

Step Instructions that will show to guardians

Step Settings

Settings > Forms > Applications > 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 > Applications > Manage Steps > Edit



Settings

Allow Changes After Submission

Admin Only

Allow Changes when W

Deliverables

Birth Certificate

SSN

Proof of Income

Drivers License

Is this student on track to graduate? *

Yes

No

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

Step Restrictions



Step Settings

Settings > Forms > Applications > 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

Fields



Edit Fields

Settings > Forms > Applications > Manage Steps > Manage Fields

Each of the Fields have their own settings which can be edited by clicking the three dots. You can also reorganize field order, duplicate a field, add fields, or delete fields here

Manage Form Steps

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

Student Information Form Fields

Manage Form Fields. Lottery Application

[Back to All Steps](#) [Conditional Logic](#) [Add Form Field](#)

Order	Form Field Label	Type	Attributes	Actions
→ =	* First Name students.fname	Text	Required: Parent Disabled:	⋮
=	Middle Name students.mname	Text	Required: Disabled:	⋮
=	* Last Name students.lname	Text	Required: Parent Disabled:	⋮

Editing a Form Field

Settings > Forms > Applications > 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 Options

Settings > Forms > Applications > 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*
Date Menu × ▾

Field Label*

Required Required Admin

Field Description/Note

Data Settings ⓘ

Save To*
Student Annual

Field Name*
ice_cream_flavor

Restricted Year Range

Years Before 2021 Years After 2021

Field Options

Settings > Forms > Applications > 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 *
Number Format

Field Label *

Required Required Admin

Field Description/Note

Data Settings

Save To *
Student Annual

Field Name *
ice_cream_flavor

Field Options

Number Format *

Ex: (999) 999-9999

SchoolMint.

Field Options

Settings > Forms > Applications > 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

Data Settings

Save To*
Student Annual

Field Name*
ice_cream_flavor

Field Options

Data Source
Enter Manually Below

Include "None" option

Include "Other" option

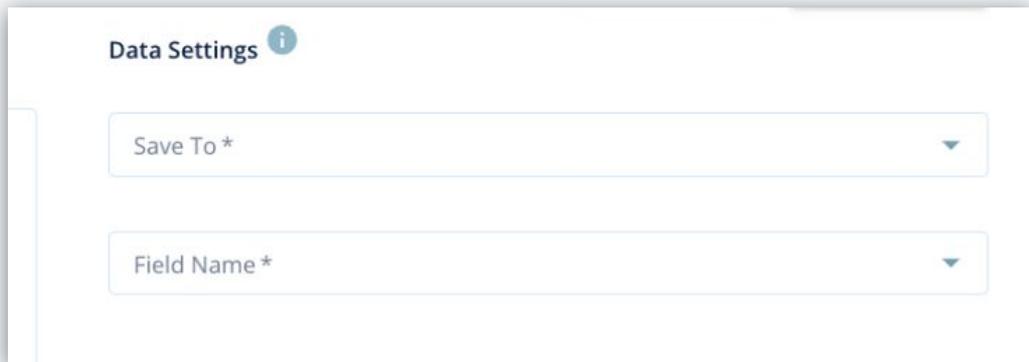
Other Placement
Bottom

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

Data Settings

Settings > Forms > Applications > 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.



Data Settings 

Save To *

Field Name *

- ★ Student Annual
- ★ Student
- ★ Application

Advanced Options

Settings > Forms > Applications > 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

Application 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 application will not impact the prior year's application.

EXCEPTION: Form fields saved to the Student record 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

Conditional Logic



Configuring Conditional Logic

Settings > Forms > Applications > 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 > Applications > 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 shows 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 SchoolMint Enroll logo, and a menu with options: Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The current page is 'Settings > Forms > Applications > Lottery Application'. The main content area is titled 'Manage Forms' and contains a 'Lottery Application Steps' section. A warning message 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 this, there are two steps listed: '1 Student Information' and '2 IEP Documentation'. Each step has a 'Manage Fields' button and icons for edit, delete, and add. The 'IEP Documentation' step is highlighted in light green.

Q&A

Survey



bit.ly/enrollformbldg

Application Alchemy:

Mastering Application Management

- For administrators who will be processing applications
- Flag creation
- Saved Views
- Processing application forms

September 5, 2024

[Click Here to Register](#)

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THANK YOU!

