



# SchoolMint Enroll



**Automate and Elevate:**  
**Creating Automated Application**  
**Processes**

# Meet the Hosts



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Presenter



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Q&A



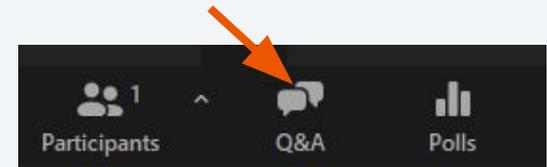
# Logistics



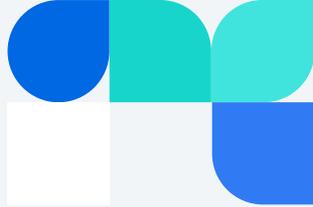
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

- Ask webinar related questions by clicking **Q&A**
- Send site-specific questions to [schoolmint.zendesk.com](https://schoolmint.zendesk.com)



Two Surveys at the end



# Agenda

- Creating automated flags
- Automating priorities
- Creating automated workflow notifications



# Application Module: The Basics



# Applications in SchoolMint



Applications

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.

# Form Field Download

Settings >> Forms >>

 **Form Field Download**

This generates a CSV file of all your report fields' data, that you can then open in Excel, Sheets, Numbers, etc.

You can use filters to search for the field you are wanting to use, as well as what data model and values are connected to it!

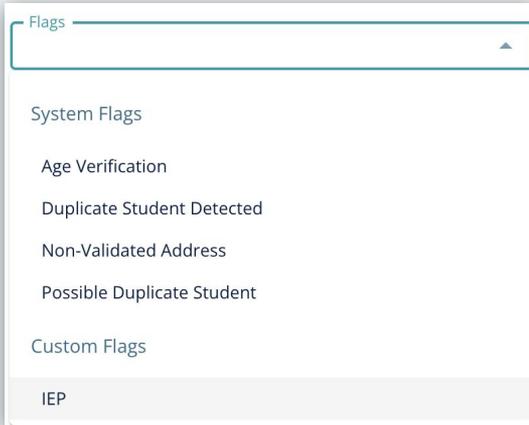


# Creating Your Flags



# What are flags?

Flags are a great way to isolate applications 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 application include IEP, 504, Expelled, Mckinney Vento, ELL, and Income



Flags

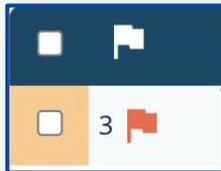
System Flags

- 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	<b>IEP/504</b> <i>Student indicated they have an IEP or 504 Plan</i>		<input type="checkbox"/>

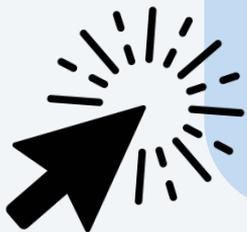
# Automating Priorities



## Manual vs. Automatic Priorities

### Manual:

Applied manually by the admin to an application during the review process. This is usually done when there is more scrutiny required when awarding this priority.



### Automatic:

Automatically assigned for students who meet the corresponding criteria. Can be calculated by the system using student data tied to questions on the application



# Create a Priority

1. Go to Settings > Manage Lotteries > Lottery Priorities
2. Click on Add New Priority
3. Configure the settings outlined in the screenshot below

## Lottery Priorities: Add New

### Priority Information

Priority Name \*

**Give it a name that is easily identifiable**

Abbreviation

**Used in some Reports and Views**

**Choose to save to the Application or Student**

Save To  
Application

**Note: If a priority should be saved to all applications a student submits, choose to save it to Student. If it should be assigned per application, choose to save it to Application.**

### Options

Automatically Set

**If Enabled: Allows configuration of logic with rules engine**

Allow Override

**If Enabled: Allows admins to override logic of automatic priority**

Clear on Roll Over

**If Enabled: Priority won't carry over into next school year**

## Configure an Automatic Priority

The rules engine is used to create priority eligibility rules that automatically set these priorities as eligible for students who meet the specified criteria. If the student data matches the rule, then the student is eligible for the priority.

- Simple Lookup
- Value Lookup
- Field Comparison
- Student Address
- Grades
- Student In Current School
- Student Continues Feeder Path
- Sibling
- Programs
- Date Range

Match **ANY** ALL of the following conditions

Value Lookup  
student\_annual.parent\_employment\_indu... ▼

Operator  
IS ▼

Expected Value  × ▲ ×

Yes  
Yes

No  
No

Add Condition ▼ Add Nested Group

**TIP:** Value Lookup allows you to choose the Field Name, Operator, and a list of values for certain fields

# Common Lottery Priorities: Siblings

Siblings are a common lottery priority used by many of our organizations

Use our Sibling Condition for Siblings Attending, and/or Siblings Applying. Sibling Applying is assigned as long as the students have a submitted application under the same guardian account. Sibling Attending is assigned through the Sibling step on the application form

Sibling

Programs

Date Range

Add Condition



Match **ANY**  **ALL** of the following conditions

Student Sibling IS

Sibling Status

Currently Attending

Sibling School

Same School as the Program's School

OR

Student Sibling IS

Sibling Status

Applying To

Sibling School

Same School as the Program's School

# Common Lottery Priorities: Address

Student Address another common lottery priority used by many organizations

Use our Student Address Condition if you have boundary files on your platform. You can prioritize students inside and/or outside of specific district, or school zones. No boundary files? No worries! As long as you are collecting address data, you can create one for State, City, or Zip!

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Add Condition

Match **ANY** ALL of the following conditions

Student Address IS Operator INSIDE OF Select Shape File District Boundary

OR

Lookup Field student\_annual.zip Operator IS Expected Value 70506

Add Condition

Add Nested Group

# Workflow Notifications



# Workflow Notifications

## Settings > Workflow Notifications

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

### Consider these workflow ideas:

- Withdrawn Application
- Grade has changed
- Choice Ranking has changed
- IEP/504 student
- Document/Upload review needed
- Anything involving next steps

### Notifications: Add New

[Cancel](#) [Save Notification](#)

**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

**Zendesk**

**Help Articles**

**Webinar Recordings and Slide Decks**

**Issues, Bugs, and General Q&As**

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

# Q&A

## Survey



[bit.ly/launch-smenroll](https://bit.ly/launch-smenroll)



**Thank You**

