



SchoolMint Enroll

**Form Crafting:
Elevating Re-Enrollment**



Meet the Hosts



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Presenter



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Q&A



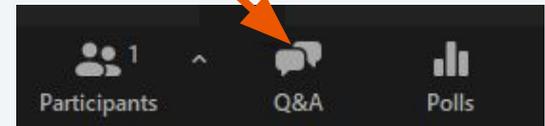
Logistics



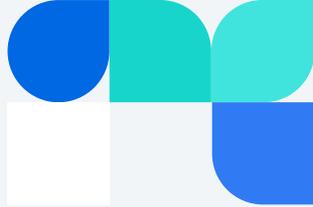
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

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



Two Surveys at the end



Today's Goals

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



Registration Module: The Basics



Registration & Re-Registration Form

1. The Registration & Re-Registration process for a school are shared in the same form
2. The form process is comprised of multiple form steps, and each step is made up of form fields
3. As a guardian fills out the form, they move from one step to the next.
4. Steps can have logic and restrictions applied if needed.

Registration / Re-registration: 2023-2024

1. Student Information	✓
2. Previous School Information	✓
3. Guardian Information	✓
4. Housing Questionnaire	✓

Student Information

1/11

Student First Name *
Alec

Student Last Name *
Robin

Questions to Consider While Editing

Prior to the start of each new re-enrollment season, we encourage you to review your registration/re-registration form with an eye toward the following questions:

- What packets did I give parents of returning students when I used paper forms?
- What do I need to know about students who are returning to my schools?
- 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.



Forms

Form Field Download

Student Information >

Applications >

Registration & Re-registration >

Custom Student Profile Tabs >

Recommendations >

Appeals >

Custom School Tabs >

Custom Program Tabs >

Forms

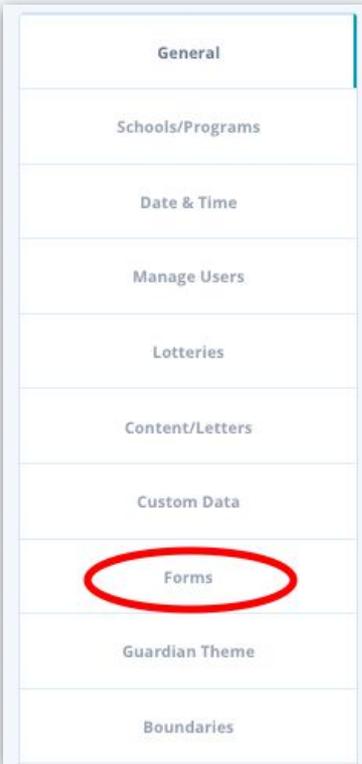


Registration & Re-Registration Forms: Editing

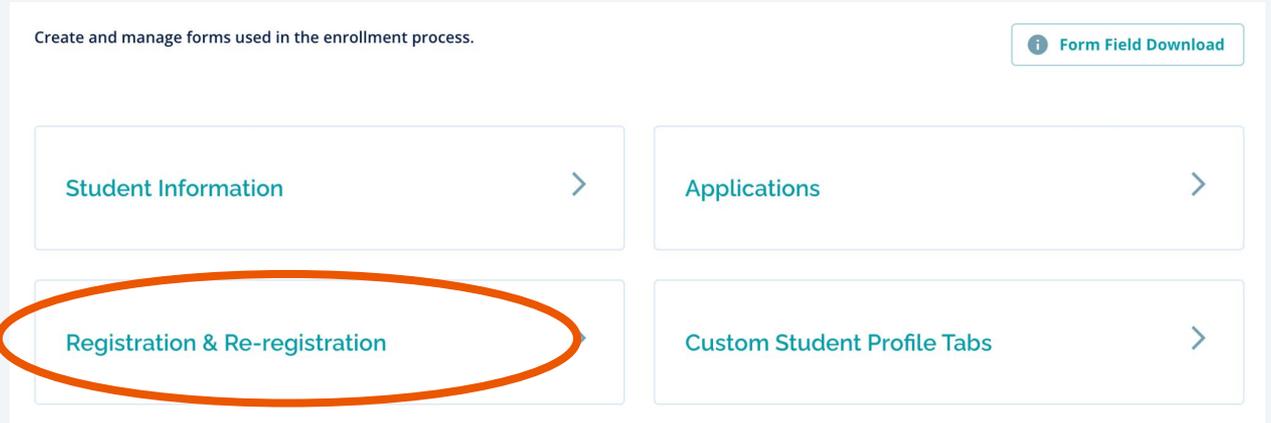
In **Settings**



click on **Forms**.



From the **Manage Forms** page, click on **Registration & Re-Registration**



Form Settings

Settings > Forms > Registration & Re-Registration > Edit



Registration / Re-Enrollment
Form Process

Manage Steps

Registration / Re-Enrollment: Edit

Cancel Save Process

Options

- Enable Student Lookup
- Student Lookup Required
- Enable Neighborhood School Banner

Process Parameters

Form Process Name *
Registration / Re-Enrollment

Content Snippets & Translations

Requirements and Policies:

EN ES FR

Edit Text

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

Form Settings

Settings > Forms > Registration & Re-Registration Forms > Edit



Options

- Enable Student Lookup
- Enable Neighborhood School Banner

Select Enrollment Type: 2021-2022

Please select the type of form you would like to submit for School Year 2021-2022

Register to a New School

This is your neighborhood school

Grove Academy Charter School

Address: 3939 West Congress Street,
Lafayette

Grades: K to 12

Register

A banner has been added to indicate which school/ program is the student's zoned school.

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!](#)

Steps



Step Management

Settings > Forms > Registration & Re-Registration > 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

Registration / Re-Enrollment

Form Process

Manage Steps

Registration / Re-Enrollment Steps

Back to Processes

Add Form Steps

Manage Form Steps

1



Student Information

Manage Fields



2

=

Previous School Information

Manage Fields



Step Settings

Settings > Forms > Registration & Re-Registration > 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

Hide or show a step for new and/or returning students

User Group Restrictions

Admin User Restriction Settings

Hide this step from user group(s):

Give view-only access to user group(s):

Registration

- Show for New Registrations
- Show for Re-Registrations

Step Settings

Settings > Forms > Registration & Re-Registration > 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 > Registration & Re-Registration > Manage Steps > Edit



Settings

Allow Changes After Submission

Admin Only

Allow Changes when W

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

Deliverables

Birth Certificate

SSN

Proof of Income

Drivers License

Is this student on track to graduate? *

Yes

No

Step Restrictions



Step Settings

Settings > Forms > Registration & Re-Registration > 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="checkbox"/>
<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/> 4	<input type="checkbox"/>
<input checked="" type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/>
<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/>

Select at least one grade

Fields



Edit Fields

Settings > Forms > Registration & Re-Registration > 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 Manage Fields ✎ 📄 🗑️

3 Guardian Information

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](#)

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 > Registration & Re-Registration > 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](#) > [Registration & Re-Registration](#) > [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 i

Field Type *
Number Format

Field Label *

Required Required Admin

Field Description/Note

Data Settings i

Save To *
Student Annual

Field Name *
ice_cream_flavor

Field Options

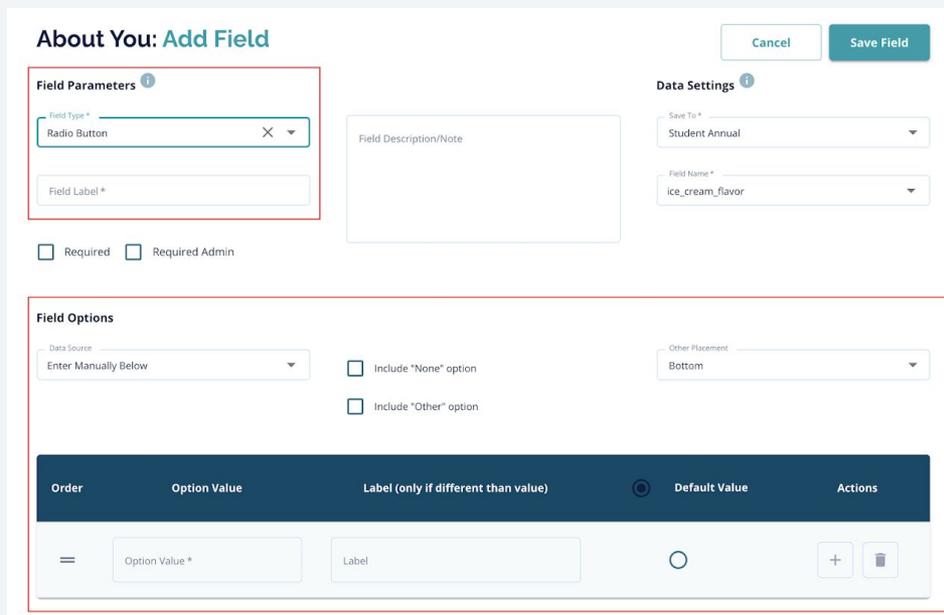
Number Format *

Ex: (999) 999-9999

Field Options

Settings > Forms > Registration & Re-Registration > 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

Field Description/Note

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

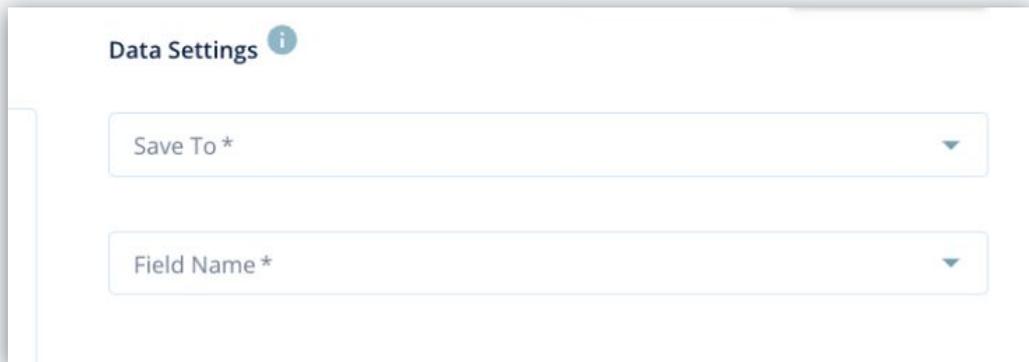
Order	Option Value	Label (only if different than value)	Default Value	Actions
=	Option Value*	Label	<input checked="" type="radio"/>	+ 

Data Settings

Settings > Forms > Registration & Re-Registration > 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.



The screenshot shows a form titled "Data Settings" with an information icon. It contains two dropdown menus: "Save To *" and "Field Name *".

- ★ Student Annual
- ★ Student
- ★ Registration

Advanced Options

Settings > Forms > Registration & Re-Registration > 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

Conditional Logic



Configuring Conditional Logic

Settings > Forms > Registration & Re-Registration > 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 > Registration & Re-Registration > 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 displays 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 current school year '2021-2022', and a settings icon. Below this is a dark navigation menu with icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main content area is titled 'Manage Forms' and shows a breadcrumb trail: Settings > Forms > Applications > Lottery Application. On the left, there is a sidebar menu with options: General, Schools/Programs, Date & Time, Manage Users, Lotteries, Content/Letters, Custom Data, and Forms. The main panel is titled 'Lottery Application Steps' and contains a warning message: 'Please note that changing steps will affect any forms submitted. We strongly recommend not changing steps once you begin accepting applications or registrations'. Below the warning, there are two buttons: 'Back to Processes' and 'Add Form Steps'. The 'Manage Form Steps' section shows two steps: 1. 'Student Information' and 2. 'IEP Documentation'. Each step has a 'Manage Fields' button and icons for edit, delete, and add.

Tips



Re-Enrollment 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 re-enrollment will not impact the prior year's re-enrollment.

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

Using the Student Information Form for Intent to Return

Settings > Forms > Student Information > Manage Steps > Manage Fields

If you want to prevent students who do not intend to return from completing a re-enrollment form, you can use the Student Information form to collect their intent to return. If the student does not intend to return, you can update your Re-Enrollment eligibility rules to only allow students who answered “yes” to that question.



Using Custom Translations?



Translate Your Form

Settings > Forms > Registrations & Re-Registrations > Translate



Registration / Re-registration

Form Process

Manage Steps

This is only necessary if you are NOT using Google Translate

Translate: Registration / Re-registration

English

Spanish

Registration / Re-registration

Translation

Choose a form step:

Student Information Get Started ^

Form Step Name: Student Information

Spanish Translation

Student First Name

Spanish Translation

Student Last Name

Spanish Translation

Reminder: Test Your Forms!



Test Re-Registrations

Step 1: Go to your Sandbox site

Step 2: Ensure re-registration dates are open

Step 3: Find a student who meets your Returning Student criteria in the Students module and click into their Profile

Step 4: Find the attached Guardian and use “Login as Guardian” feature

Step 5: Go through the Re-Registration flow

[Click Here: How to Test on Sandbox](#)

Q&A

Survey



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THANK YOU!

