SchoolMint Enroll

Lottery Prep Deep Dive

Meet the Hosts

Alexis Lanier
Sr. Professional Services Specialist
Presenter

La'Toya Guillory
Customer Experience Manager
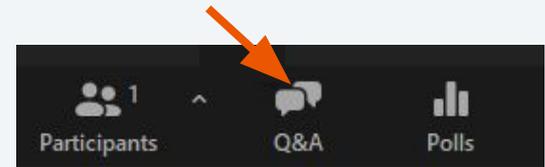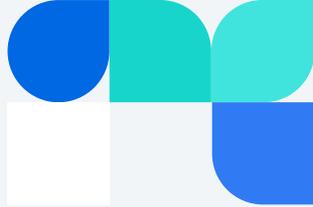**Q&A**

SchoolMint.

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**
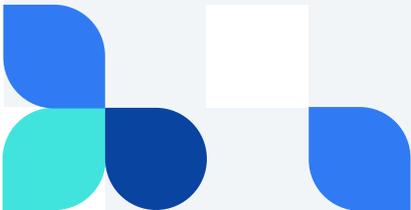- Send site-specific questions to **schoolmint.zendesk.com**

Two Surveys at the end

Today's Goals

- Utilizing Lottery Designs for Efficiency
- Ensuring Correct Settings for Runtime
- Program Specific Settings

Lottery Module

Poll: Which game show host do you think would run the best school lottery?

Oprah Winfrey - "You get a seat! And YOU get a seat!"

Alex Trebek – "I'll take Enrollment for 500!"

Howie Mandel – "Deal or No Deal...?"

Steve Harvey – "Survey says... you're on the waitlist!"

SchoolMint.

Guardian Notifications: Lottery Email & Text Templates

Settings> Content/Letters > Email and Text Templates

- Lottery Placement Accepted - Parent Notification
- Lottery Placement Declined - Parent Notification
- Lottery Results - Waiting List
- Lottery Results - Offered
- Lottery Placement Email Consolidated - Sent to All Students Placed

Assign these emails under:

Schools/Programs > Manage Programs > Edit > Lottery Settings

SchoolMint.

Using Consolidated vs. Individual Placement Notifications

Consolidated:

Sends one email notification to all students placed and what list they are in. Ideal for schools that want to keep notifications to a minimum
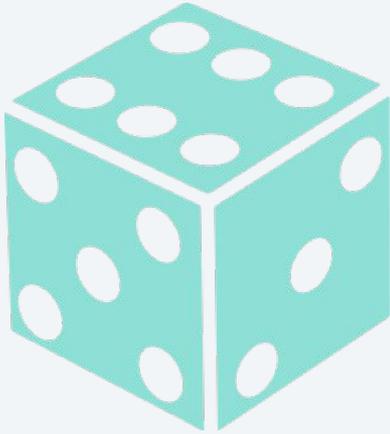
Individual:

Sends an email for each placement that the student is in and where they are placed. Ideal for placement-specific verbiage

SchoolMint.

Lottery: Priorities

Settings > Manage Lotteries > Lottery Priorities

Priorities are used to give students a **higher chance** to be placed on the offered list. Students with priorities are **more likely** to get into a school/program when the lottery is run, or will sit higher on the waitlist in comparison to students with no priorities if there is no space left on the offered list.

SchoolMint.

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

SchoolMint

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

Save To
Application

Choose to save to the Application or Student

Options

☑ Automatically Set

☐ Allow Override

☐ Clear on Roll Over

If Enabled: Allows configuration of logic with rules engine

If Enabled: Allows admins to override logic of automatic priority

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

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.

SchoolMint.

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.

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

Lookup Field
student_annual.zip

Operator
IS

Expected Value
70506

Add Condition ▼   **Add Nested Group**

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Simple Lookup allows you to choose the Field Name, Operator, and Expected value. For example, the priority above is going to be assigned to any student where the Zip Code is 70506

SchoolMint

Oprah's Favorite Lottery Priorities: Siblings

This is 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

DEMO

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

Oprah's Favorite Lottery Priorities: Address

This is another common lottery priority used by many of our 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

SchoolMint

Oprah's Favorite Lottery Priorities: None!

Sometimes, you don't need a priority lottery. Here is what you can do:

You will want to ensure that the "priority" is something that can apply to ALL students. You can do this by creating a priority that applies to all applications that are marked as eligible. Students will then receive the "No Priority" priority on their eligible applications.

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Con...

Sibling

Programs

Date Range

Add Conditi...

Match **ANY** ALL of the following conditions

Lookup Field
application.status ▼

Operator
IS ▼

Expected Value
1

Add Condition ▼   Add Nested Group

SchoolMint
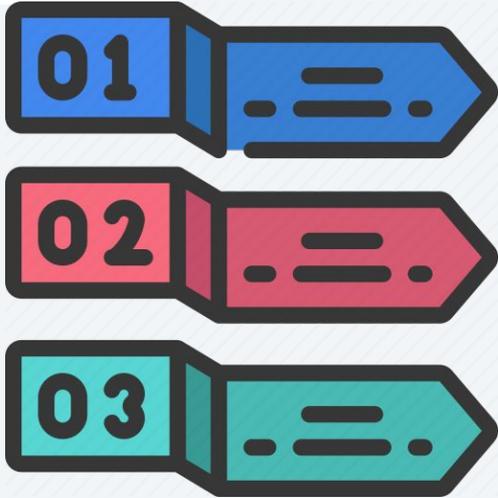
Lottery Designs

Lottery: Designs

Settings > Manage Lotteries > Lottery Designs

While the priority is used to give the student's application a higher chance of placement, the sub-lottery that the priority is assigned to, along with the rules (entries, weights, quotas, etc.) in the lottery design, will drive where the student is actually placed on the lottery list. Many lotteries have one priority per sub-lottery. If you happen to have more than one priority in a sub-lottery, you can choose between a tiered or weighted design.

I'll take Lottery Designs for 200, Alex!

Tiered:

Assigns an **Entries** amount for each priority included in a **sub-lottery**. An application whose **highest priority has more entries** than other applications **in that same sub-lottery** will have an **increased chance** of being placed above the others. Entries **do not guarantee a higher placement**, they just increase the chances of higher placement **within a sub-lottery**.

Weighted:

Assigns a **Weight** for each priority included in a **sub-lottery**. An application whose **highest priority has more weights** than other applications **in that same sub-lottery** will **always be placed above** other applications with a lower weight priority. Priority weight dictates the ordering of applications **within a sub-lottery**. Applications with **equal weight** priorities **within the same sub-lottery** will be **randomly ordered**.

Score-Based:

Students are placed on the lottery list **according to the scores they receive**. This score and how it is calculated will vary based on the organization, but students can receive this score either through a formula created with a c**alculated field type**, an **import**, or **manual scoring** documentation by admins.The admin can select the field where scores are collected the **sorting order** (either ascending or descending).

SchoolMint.

Lottery: Lottery Designs

Settings >> Manage Lotteries >> Lottery Designs

Choose a specific number of seats, or percentage of seats for that priority

Amount of "Entries" or "Weight" a priority is given

If Enabled: Will "sum" your Entries or Weights within the Sub Lottery

Add Multiple priorities for an AND function

Tiered (Entries) Lottery ⓘ

Weighted Lottery ⓘ

1

Sub-Lottery: 1

Select one or more priorities
Income Eligible ✕

Entries
1

Add Quota

Add a Priority Group

Guaranteed Placement ☐   Make Entries Cumulative ☐   **Sort by Score**

Add Multiple priorities for an OR function

If Enabled: Will overseat your cutoff number

For score based lotteries: Choose your scoring field and how your scores are sorted

SchoolMint.
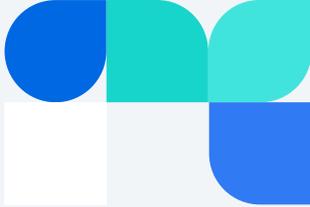
Let's Look At Some Examples

Tiered Lottery

Think of entries as tickets in the (sub-lottery 1) metaphorical hat.

The Employee Child application has 4 more chances than the Board Member's 1 chance, but the Employee Child application is not guaranteed to get placed above the Board Member application

During the lottery execution, the randomization within the sub-lottery could pull the Board Member's 1 entry/ticket out of the hat before getting to any of the 4 entries/tickets for the Employee Child

Note: Entries can be cumulative!

Weighted Lottery

Weights will typically be placed in a highest weight to lowest weight order

The application with the Employee Child priority with a weight of 4 will always be ordered above applications with the Sibling Attending or Board Member priorities with weights of 1.

Applications with either the Sibling Attending or the Board Member priority in this sub-lottery will be randomly ordered against each other, but always after applications with the Employee child priority.

Note: Weights can be cumulative!

Scored Lottery

Score can be placed in Ascending vs Descending order

Application are being scored for auditions, and we want to place students with the highest score first, and students with the lowest score last

Applications with the same score can be set to be randomized amongst each other, or placed in order of date submitted when you go to run the lottery

1

Sub-Lottery: 1

Score Lottery:

Select Score Field
application.score_total ▼

Select Order
Descending ▼

Add Quota

+
Click to Add Sub-Lottery

Cancel   **Save Lottery**

Seats or no seats...?

Settings > Manage Lotteries > Lottery Cutoff Numbers

1. Filter for the Program
2. Enter in the number of seats available for each grade
3. Save

The input cutoff number will then be used in the lottery and when managing the waitlist.

Lottery Cutoff Numbers

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

Cancel | Save Cutoff Numbers

Export Cutoff Numbers

| Program(s) | School Level(s) | Program Categorie(s) | Apply Filters |

Birch ES Open Enrollment ⊗ ▼

Elementary School: Open Enrollment Programs

Birch ES Open Enrollment

Grade	Group	Cutoff Numbers	Current	Available
1	General Lottery	0	0	0
2	General Lottery	7	3	4

CLICK HERE:
How to bulk import cutoff numbers

SchoolMint

Lottery:
Lottery Settings
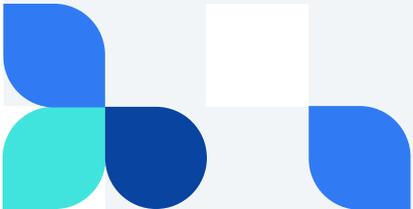
Survey says...check your settings!

Settings > Manage Lotteries > Lottery Settings (Global)

GLOBAL

BY FORM PROCESS (4)

Notifications

☑ Show lottery results on guardian dashboard

☑ Show waiting list number on guardian dashboard

Accept/Decline Placement

☑ Allow guardians to accept/decline seats from dashboard

Auto-Decline

☑ Auto-decline a student's other applications on Offered Lists once a seat is accepted

☑ Auto-decline **APPLICATIONS** if **OFFER** is not accepted by:

Days After Published Offer		Date *		Time of Day	
10	and/or	01/31/2025	at	10:00 AM	

If the "Days After Published Offer" extends past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

☑ Auto-decline **APPLICATIONS** if **REGISTRATION** is not submitted by:

Days After Accepting Seat		Date *		Time of Day	
10	and/or	01/31/2025	at	05:00 PM	

If the "Days After Accepting Seat" extend past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

These options affect auto-decline settings:

☑ Send a reminder email/text message to warn guardians before auto-decline

Days Before Auto-Decline *		Time of Day	
1	at	10:00 AM	

☑ Exclude weekends

Waiting List

☑ Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)

☑ Roll over waiting lists when the school year is rolled over

Post Lottery

☑ Auto-add eligible applications to lottery list after initial lottery is run

General

☑ Place Multiples Together
Same parent account & grade level required.
Does not affect score-based lotteries.

☑ Same Address

☑ Twin Setting (same birthday ±1 day)

Review each setting carefully to align with your desired lottery settings!

DEMO

Note: If you have auto-decline on execution, you will want to make sure to have auto-rollup on to fill your seats

SchoolMint.

Lottery:
Form Process Lottery Settings

Form Settings

Settings > Manage Lotteries > Lottery Settings (By Form Process) > Select the form process you are updating

Waiting list:

☐ Auto-decline student's applications on waiting list when accepting a seat

BY FORM PROCESS (4)

For Multi-Choice Only

DEMO

Auto-Decline Settings for:

Select Form Process
Magnet Programs Application (1 of 4)

Auto-Decline on Lottery Execution: Magnet Programs Application

Offered list:

☑ Auto-decline student's applications on offered list ranked as **LOWER CHOICE** if offered higher ranked choice

Waiting list:

☑ Auto-decline student's applications on waiting list ranked as **LOWER CHOICE** if offered higher ranked choice

☑ Auto-decline student's applications on waiting list ranked as **HIGHER CHOICE** if offered lower ranked choice

Auto-Decline on Offer Acceptance: Magnet Programs Application

Waiting list:

☑ Auto-decline student's applications on waiting list ranked as **LOWER CHOICE** upon accepting seat into higher ranked choice

☑ Auto-decline student's applications on waiting list ranked as **HIGHER CHOICE** upon accepting seat into lower ranked choice

For Ranked Choices Only: Review each setting carefully to align with your desired lottery settings!

Note: If all are enabled, that is the same as your "single best choice"

SchoolMint

Lottery:
Program Specific Lottery Settings

SchoolMint.

Program Settings

Settings > Schools/Programs > Manage Programs > Edit > Lottery Settings tab

PROGRAM INFORMATION   PROGRAM ELIGIBILITY   APPLICATION SETTINGS   **LOTTERY SETTINGS**   SCHOOLFINDER

Primary Settings

Lottery Design
Open Enrollment (Prioritized or Tiered Lottery)

Lottery Group Design
General Lottery

Accept/Decline Placement

☑ Allow guardians to accept/decline seats from dashboard

Auto-Decline Published Offer

☑ Auto-decline a student's other applications on Offered Lists once a seat is accepted ⓘ

◉ Global Lottery Settings   ○ Custom   ○ Off

Auto-Decline Accepted Seat

Waiting List

☑ Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)

Post Lottery

☑ Auto-add eligible applications to lottery list after initial lottery is run

Lottery Notifications to Guardians:

Accepted Placement Notification
ABC Elementary Lottery Offered Accepted

Declined Placement Notification
Lottery Placement Declined - Parent Notification

Offered Placement Notification
Lottery Results - Offered

Waiting List Notification
Lottery Results - Waiting List

☑ Show lottery results on guardian dashboard
☑ Show waiting list number on guardian dashboard

Lottery Notification to Admins:

Lottery Placement
test@admin.com,test2@admin.com

General

☑ Place Multiples Together
Turn off multiples together for this program only.

Manage parent results on their dashboard by program

Manage if and when auto-decline happens by program

Manage auto-rollup by program

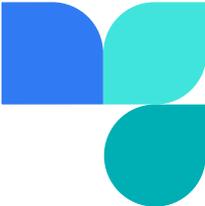**Tip: While you're here, double check the correct design and communications are connected!**

Manage multiples by program

Manage adding post-lottery applications by program

SchoolMint.

Q&A

Survey

SCAN ME

SchoolMint

Running and Managing Lotteries

- **Running a Lottery**
- **Lottery list features**
- **Managing placements on the lottery list**

February 11, 2024

Click Here to Register

SchoolMint

Admin Resources

Zendesk

Help Articles

Webinar Recordings and Slide Decks

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

SchoolMint

Q&A

Q: Does the consolidated email get sent to students not in the lottery because they are marked ineligible?	A: Correct. They wouldn't be automatically sent, but you can manually email those individuals in bulk to those students that have not been processed in the lottery. Only eligible lottery applicants who have gone through the lottery will be eligible to receive the notification once selected in your program lottery settings and published.
Q: How do we know if the system is set for consolidated messages?	A: This would be set up under your program lottery settings. You can find this by going to settings>schools & programs>manage programs>edit>lottery settings>Notifications> set notifications you would like to automatically go out there. If you would like to change consolidated email to separate, please reach out to Support on Zendesk or your CX
Q: How do we add a link for a video to the email?	A: You can do this in the settings>content/letters section and edit the template. You can add it in the body of the email - it will look like a square with a triangle in it. Something to note though is that the text template has a limited number of characters so a link might not fit in that instance.
Q: I only have Tiered and Weighted Lottery as my options in Lottery Design. Seems like score-based would be better for our needs. How do I get this?	A: A scored lottery is found in the sub-lottery itself, rather than the tabs at the top of the screen!

THANK YOU!

SchoolMint