



# SchoolMint Enroll

## Managing Lotteries After Execution



# Meet the Hosts



**Alexis Lanier**  
Sr. Professional Services Specialist  
Presenter



**Dominique Copeland**  
Implementation Specialist  
Q&A



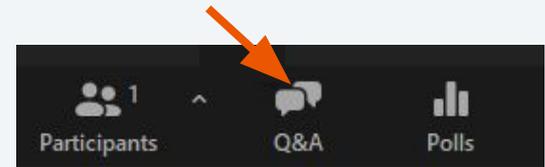
# Logistics



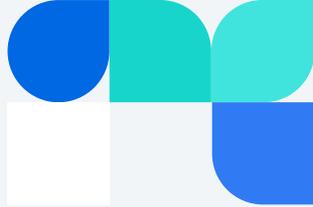
Slides, recording, and related resources will be shared in the follow up email tomorrow

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



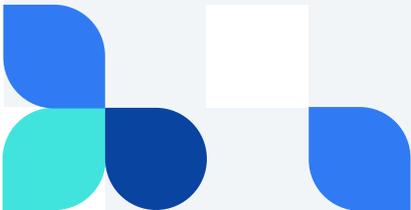
## Today's Goals

- Running a Lottery
- Managing Lottery Lists
- Using Post-Lottery Features

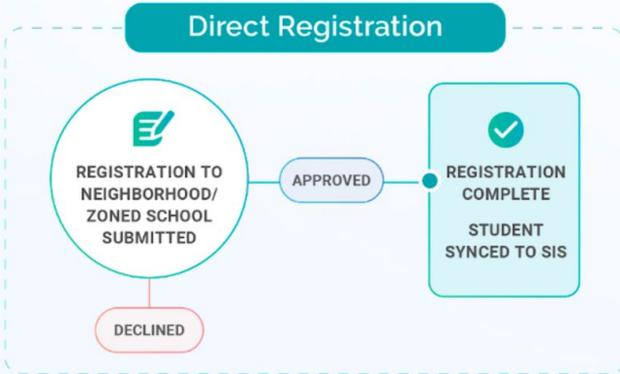
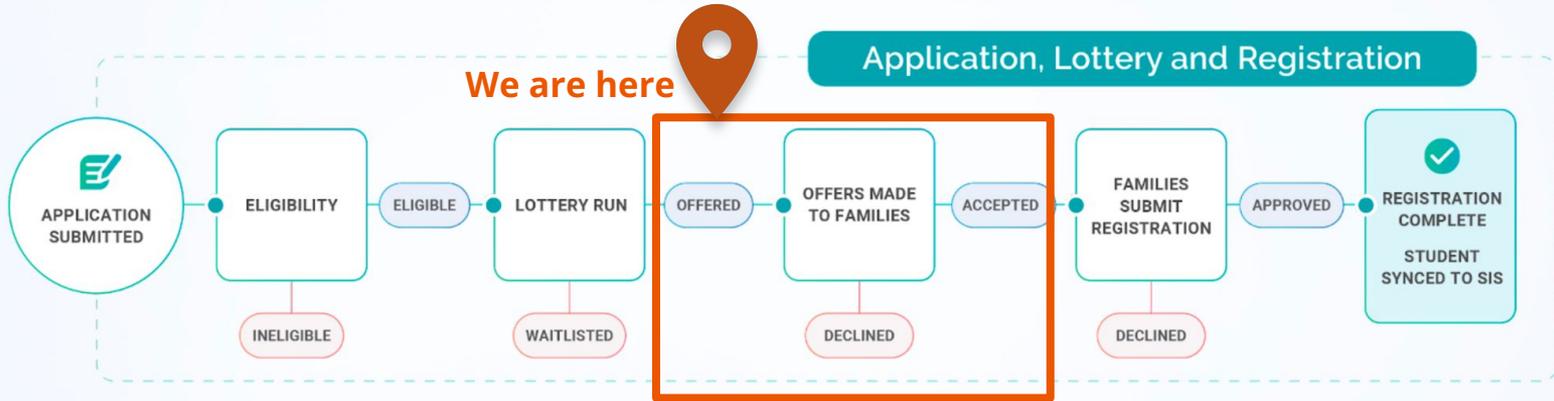




# Lottery Module



# SchoolMint Enroll | Enrollment Flow





# Lottery: Guardian View



# Steps Guardian Takes to Accept a Seat

Once a guardian has been offered a seat, they will be able to accept their seat from their dashboard, which will then have a pop-up window appear to confirm acceptance. Their messages center will also contain a copy of their accepted email once accepted.

1

SchoolMint Enroll

<

## Amber Smith Submitted Forms

View status and take action on all submitted applications and registration forms for Amber Smith.

### Amber's Applications

+ Applications

Open Enrollment Application

Edit Ranking

Birch ES Open Enrollment

Offered Expires on: 11/11/2024 10:00 AM

Choice 1

Withdraw Decline Accept

2

## Accept Placement

Please confirm you want to accept your current placement at Birch ES Open Enrollment?

Cancel Yes, Accept Placement

3

SchoolMint Enroll

## Message Center

Search by Student Name or Subject

Amber Smith 02:33 pm

Amber Smith Placement Accepted - The placement fo...

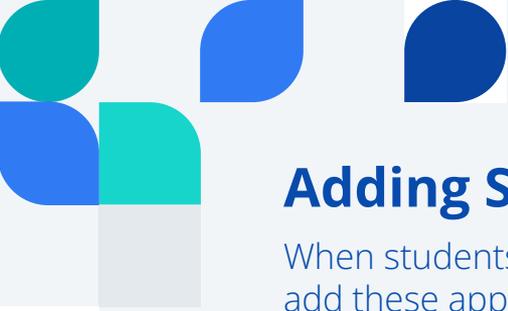
[Click Here to Learn More](#)



# Lottery:

## Post-Lottery Placements





## Adding Students to the Lottery List

When students submit applications after the lottery window, there are two options to add these applications to the lottery list:

### **Option One:**

Have “Auto-add eligible applications” setting enabled in Global. This will add applications to the lottery list automatically without having to run a new lottery pool.

### **NOTE:**

If you choose option one, please reach out to your CX or our Zendesk Support Team to discuss options and impacts of this setting!



# Auto-Add



# Auto-Add Feature

Enable the post-lottery setting “Auto-add eligible applications to lottery list after the initial lottery is run setting” + mark applications as eligible one at a time in the order you want them added to the lottery list. Work with your CX or our Support Team to confirm if these students are placed at the bottom of the list, or within their priority group.

## Post Lottery

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

## Application Status

### Submission

- Submitted
- Not Submitted

### Eligibility

- Eligible
- Ineligible
- In Processing

Submitted On

05/01/2024 12:00 PM



Central Time

**NOTE:** There are exceptions to this process. [Click here to learn more](#)



# Merge





## Lottery: Pools

A lottery “pool” is a grouping of applications that were run through the lottery at the same time. The first run lottery round is going to be lottery pool 1, therefore, all applications placed with that round are in lottery pool 1. If a second lottery round is run for the same program, then lottery pool 2 will be created, and so on. Organizations will often run multiple lottery rounds for the same program if there is limited seat availability. This is particularly the case when additional lottery rounds are necessary due to updates, such as the addition of new applicants.

# Merge vs. No Merge for Additional Lottery Pools

If you are an organization that runs multiple lottery pools, you will have the option to either merge your additional lottery pool, or not merge your additional lottery pool

## Multiple Lotteries <sup>1</sup>

### Merge Waitlist <sup>2</sup>

Merge new applications into existing priority groups

## New Students:

- Walter - Priority 1
- Alexis - Priority 2

## Merged Lottery:

If checked, merges applications to the end of their priority group (applies to waitlist placements only).

Billy - pool 1 Priority 1  
Sally - pool 1 Priority 1  
**Walter - pool 2 Priority 1**  
Harry - pool 1 Priority 2  
**Alexis - pool 2 Priority 2**

## Not Merged Lottery:

If not checked, students are added in priority order after the first pool.

Billy - pool 1 Priority 1  
Sally - pool 1 Priority 1  
Harry - pool 1 Priority 2  
**Walter - pool 2 Priority 1**  
**Alexis - pool 2 Priority 2**

# Show Inactive

If enabled, this will show previous pools of your lottery lists, which you can then access to see what those lists looked like before the next pool was run

## Lottery Dashboard

Show Inactive

View real-time lottery runs for each program, showing offered lists and waiting lists.

**Bulk Actions** ▾ 3 / 7 Selected    Program(s) ▾    School Level(s) ▾    Program Category(s) ▾

<input checked="" type="checkbox"/>	Run Date	Program	Category	Pool <sup>i</sup>	User	Published	Actions
<input checked="" type="checkbox"/>	2024-02-08 13:50:09	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	3	Anthony Playmith	No	<a href="#">View</a>
<input type="checkbox"/>	2024-02-08 13:00:01	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Anthony Playmith	No	<a href="#">View</a>
<input type="checkbox"/>	2024-02-08 12:55:09	Birch ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Anthony Playmith	No	<a href="#">View</a>
<input checked="" type="checkbox"/>	2024-01-29 11:24:20	Dogwood ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>
<input type="checkbox"/>	2024-01-29 11:23:17	Dogwood ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Alexis Robin	No	<a href="#">View</a>
<input checked="" type="checkbox"/>	2024-01-29 10:46:38	Cedar ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	2	Alexis Robin	Yes	<a href="#">View</a>
<input type="checkbox"/>	2024-01-29 10:45:07	Cedar ES Open Enrollment	<a href="#">Open Enrollment Programs</a>	1	Alexis Robin	No	<a href="#">View</a>

# Cutoff Numbers



# Updating Cutoff Numbers Post Lottery Run

Lottery cutoff numbers may need to be updated after running the initial lottery due to changes in seats available in a class/program/school.

## Settings > Manage Lotteries > Cutoff Numbers

Elementary School: [School Choice](#)  
Earth Elementary School

Grade	Group	Cutoff Numbers	Current	Available
1	General Lottery	10	0	10
2	General Lottery	8	0	8
3	General Lottery	5	0	5
4	General Lottery	19	0	19
5	General Lottery	10	0	10
K	General Lottery	9	0	9
Total		61	0	61

### Save Cutoff Numbers?

Save cutoff numbers and update lottery list

- Waitlisted applications will be moved to the Offered List in existing placement order.
- If an offer expiration deadline is in the past, the lottery list update will not occur.
- If the lottery list has been published, guardians will be notified of the change.
- This only applies to grades where the lottery has been run in the 2024-2025 school year.

Save cutoff numbers but do not update lottery list

*Save cutoff numbers but do not update lottery list*

Cancel

Save

[Click Here to Learn More](#)



# Lottery: Saved Views



## Create Saved Views on Lottery

The Saved View functionality on the Lottery & Placements page is especially useful for displaying critical lottery information to assist with tracking acceptances, declines, expiration deadlines (if using offer expiration), manual movements, etc.

OFFERED LIST *4 Assigned, 3 Seat(s) Available* Grade Pu

Expiration Date	sublottery	Status	Original Rank	Rank	Timestamp Notified Offered	Timestamp Initial Notification	Accepted Declined By	Manual Movement
	1		1	1	2023-12-06 10:55:52	2023-12-06 10:55:52	A	0
	3		2	2	2023-12-06 10:55:53	2023-12-06 10:55:53	P	0
	3		3	3	2023-12-06 10:55:53	2023-12-06 10:55:53	P	0
	4		4		2023-12-06 10:55:53	2023-12-06 10:55:53	P	0
 01/09/2024 10:00 AM	3		5		2024-01-03 10:18:05	2024-01-03 10:18:05	S	1



Create This Saved View for  
Lottery

## Add These Columns to Your Saved Views

Lottery Ranking	timestamp_notified_offered	Timestamp Offered	Date/time when Offer was published to family
Lottery Ranking	timestamp_notified	Timestamp Initial Notification	A helpful column for your Waiting List Date/time when family notified of initial lottery result
Lottery Ranking	accepted_declined_by	Accepted/Declined By	Who accepted/declined the offer: <ul style="list-style-type: none"><li>• A=Admin</li><li>• P=Parent</li><li>• S=System</li></ul>
Lottery Ranking	manual_indicator	Manual/Admin Placement	1=Placed Manually by Admin 0=System Placement (based on lottery settings enabled)

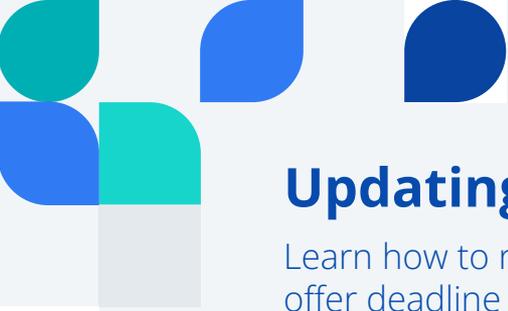


# Lottery:

## Correct Student Placements



# Reissue an Auto-Dedline



## Updating Auto-Declines or Missed Deadlines

Learn how to reissue an offer to a family who was auto declined due to missing the offer deadline

### **Scenario One:**

Family requests that admin accepts an auto-declined offer on their behalf

### **Scenario Two:**

Family requests a deadline extension for a pending offer

### **Scenario Three:**

Family requests a deadline extension for an auto-declined offer

### **Scenario Four:**

You no longer want pending offers held to the expiration date and want to turn off Auto Decline



## Scenario One

The offer deadline *has passed* and the placement is auto declined by the system. The family requests that you Accept the Offer on their behalf. If your enrollment policy permits (and if there is a seat available), as an admin, you have the ability to Adjust the Placement for a student by updating the status of the offer from Declined to Accepted

Status	Sub-Lottery	Weight	Score	Priority	Published	Actions
<span>✖</span>	5	1	-	No Priority	<span>Yes</span>	<ul style="list-style-type: none"><li>Adjust Placement</li><li><b>Change Lottery Status</b></li><li>View Placement History</li><li>View Application</li></ul>

**Update Placement Status**

Select Status \*

- Accepted
- Declined
- Pending

## Scenario Two

The offer deadline *is approaching* and the family contacts you to request more time / extend the deadline for a pending offer.

**NOTE:** The Enroll system does not support extending an existing deadline on a Pending Offer once an offer is published with an assigned deadline, the deadline cannot be updated for that pending offer

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

Days After Published Offer	and/or	Date *	at	Time of Day
30		08/30/2025		05:00 PM

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.

You can fix this by updating the future auto-decline date in the system, and moving the student's auto-declined placement back to Pending status (effectively re-issuing the offer) and publishing the offer with the new deadline (see: scenario one).

## Scenario Three

The offer deadline *has passed* and the family contacts you to extend the deadline for an auto-declined offer. If your enrollment policy permits (and a seat is available), you have the option of setting a new, future auto-decline date in the system and moving the student's auto-declined placement back to Pending status (effectively re-issuing the offer) and publishing the offer with the new deadline.

Status	Sub-Lottery	Weight	Score	Priority	Published	Actions
<span style="color: red;">✘</span>	5	1	-	No Priority	<span style="border: 1px solid green; border-radius: 50%; padding: 2px;">Yes</span>	<ul style="list-style-type: none"><li>Adjust Placement</li><li>Change Lottery Status</li><li>View Placement History</li><li>View Application</li></ul>

Select New Status \*

Pending

**NOTE:** If your auto-decline date is passed, make sure to review/update in your Lottery settings

## Scenario Four

You no longer want pending offers held to the expiration date and want to turn off Auto Decline. If you have pending offers that have an upcoming deadline assigned, you have the option (if your process/policy permits) to turn off the Auto Decline/Offer Expiration setting to remove the deadline from pending offers all together.

### Global Lottery Settings

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

### Program-specific Lottery Settings

#### 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

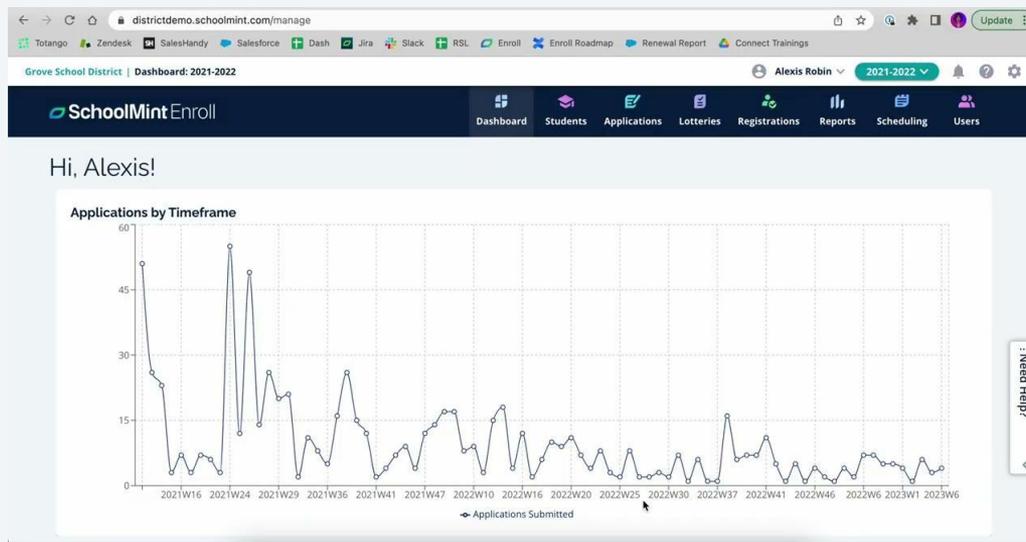
- Global Lottery Settings  Custom  Off

# Correct a Student on the Wrong List



# Correct a Student Placed on the Wrong List

A guardian submitted an application for their student for the wrong grade. That student was already placed on a lottery list. How do I correct this so that the student can be placed on the lottery list for the right grade?



[Click Here to Learn More](#)

# Q&A

## Survey



# Monthly Webinar

## Fundamentals of Reporting

- Learn the basics of the Reports Module
- Available every month, so join one that works best for you

[Click Here to Register](#)

**Zendesk**

**Help Articles**

**Webinar Recordings and Slide Decks**

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

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

**THANK YOU!**

