SchoolMint Enroll

Registration Prep Best Practices

Meet the Hosts

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Presenter

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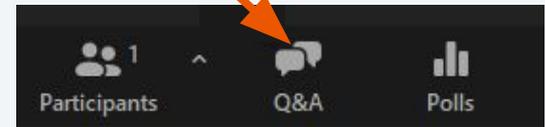**Customer Experience Manager**
Q&A

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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**
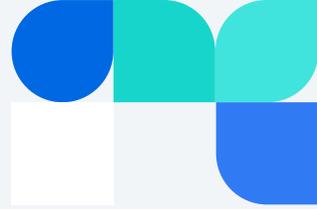

Two Surveys at the end

Registration Module: The Basics

Setting up Registration

In order for Registrations/re-Registrations to be submitted, the following must be set:

- ❏ The Form needs to be connected to the school
- ❏ Registration calendar dates need to be open
- ❏ Each school has been reviewed and set up
- ❏ New Students: Registration rule needs to be reviewed and assigned at the School
- ❏ Returning Students: Re-Registration rule needs to be reviewed and assigned at the School Group
- ❏ Communication Templates have been reviewed and updated as needed

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Reviewing Your Settings

School Settings

Settings > Schools/Programs > Manage Schools > Primary

- If using Sync Service, ensure the correct Connection is set
- Ensure your school's address is correct

School Settings

Settings > Schools/Programs > Manage Schools > School Eligibility

- Make sure your Eligibility rule is connected
- If using boundaries/zones, ensure that they are connected here
- If applicable, ensure that relevant grades for the boundaries are also selected

Eligibility Rules

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Configure an Eligibility Rule

The rules engine is used to create eligibility rules that allow students to access a form process as long as they meet the specified criteria.

Settings > Custom Data > Eligibility Rules/Restrictions

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Student is eligible if **ANY** ALL of the conditions below are met

Lookup Field
student.id

Operator
IS

Expected Value
0

Add Condition

Add Nested Group

You can use the "Add Condition" option to utilize pre-configured rules. "Simple Lookup" allows you to configure your own rules.

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Common Registration Rule:
Offered + Accepted Lottery Placement

Only students in Accepted status on the offered list for your lottery may register at the school that has this rule assigned.

Student is eligible if **ANY** ALL of the conditions below are met

Lookup Field	Operator	Expected Value
student.id	IS	0

Add Condition ▾   **Add Nested Group**

This scenario works because the platform looks at the registration rules AND whether a student has an accepted seat. Since no student will have an ID of 0, the platform will then automatically look to see if a student has accepted a lottery offer.

Common Registration Rule:
Register in Zoned School / Neighborhood School

Only students residing within the specified boundary(s) may register at the school that has this rule assigned.

Student is eligible if **ANY** ALL of the conditions below are met		

Student Address IS

Operator
INSIDE OF ▾

Select Shape File
School Zone ▾   ⊗

Add Condition ▾   **Add Nested Group**

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Sibling

Programs

Date Range

Note: Ensure the boundary is connected to the school!

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Common Re-Registration Rule:

Students may only re-register in the school that is set as their current school

Common Re-Registration Rule:

Students may only re-register in the school that is set as their current school, AND they have an SIS ID and/or are considered "Returning"

School Settings

Settings > Schools/Programs > Manage Schools > Registration Settings

PRIMARY   SCHOOL ELIGIBILITY   **REGISTRATION SETTINGS**   FEEDER SCHOOLS

Registration Grades:

☑ Infant Toddler   ☑ PreK   ☐ K   ☐ 1

☐ 2   ☐ 3   ☐ 4   ☐ 5

☐ 6   ☐ 7   ☐ 8   ☐ 9

☐ 10   ☐ 11   ☐ 12

Registration Dates:

◉ System Default   ○ School Specific

Re-Registration Dates:

◉ System Default   ○ School Specific

Registration Settings:

Registration Forms
Registration / Re-registration ▼

☑ Show eligibility status on guardian dashboard

Notifications to Guardians:

Registration Complete Email
Registration Complete ▼

Re-Registration Complete Email
Re-Registration Complete ▼

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School Settings

Settings > Schools/Programs > Manage Schools > Feeder Schools

- Optional: If your organization has feeder schools, ensure they are connected here

Note: Select the school(s) that feed into the school you're editing. Ex: If you're editing the middle school settings, you'd select the elementary school(s) that feeds into the middle school

Group Settings

Settings > Schools/Programs > Manage School Groups

- Ensure the correct district boundary is connected
- Ensure the correct Re-Registration rule is connected

Oak School District: Edit

Cancel   Save Group

Group Information

Group Name *
Oak School District

Group Code *
1

Boundary Settings

Select Shape File
Lafayette Test Boundary

Re-Registration Rule

Select Re-Registration Rule
Re-register in Current School

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Date Settings

Settings > Date & Time > Click to Manage for Each School Level

- Ensure the correct registration dates are set
- Ensure the correct re-registration dates are set

School Levels

Add, edit, and delete school levels.

Add New Level

Level Name	Grades		Registration Dates		Re-Registration Dates	Actions
Elementary School	K - 5	●	09/01/2023 05:26 PM - 03/29/2024 05:26 PM	●	10/14/2022 06:00 AM - 12/31/2024 11:59 AM	✏️ 🗑️
Middle School	6 - 8	●	01/01/2022 12:00 AM - 01/01/2025 12:00 PM	●	10/14/2022 06:00 AM - 10/01/2024 11:59 PM	✏️ 🗑️
High School	9 - 12	●	12/01/2022 12:00 PM - 12/01/2024 12:00 PM	●	10/14/2022 06:00 AM - 12/01/2024 12:00 PM	✏️ 🗑️
Early Childhood Education	Infant Toddler - PreK	●	12/01/2022 12:00 AM - 12/01/2024 12:00 PM	●	12/01/2022 12:00 AM - 12/01/2024 12:00 PM	✏️ 🗑️

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Registration/Re-Registration Communications

Update text and email templates

Settings >> Content/Letters >> Email and Text Templates

- ○ Use the Type filter to find your Registration/Re-Registration emails
- ○ Click Edit ✎ for each template and read through to see if there are any adjustments needed

Note: There has been a recent change to the character limit for Text Messages to 123 characters. Ensure that your texts don't exceed this new limit!

Email and Text Templates
Manage templates used throughout the system.

| Search | | Type Registration/Re-Registr... ▾ | Add New Template |

Name	Type	Actions
Registration Complete	Registration/Re-Registration	✎ 🗑
Re-Registration Complete	Registration/Re-Registration	✎ 🗑

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Create Custom Notifications for Each School!

For Organizations with more than 1 school, you can create school-specific Registration and Re-Registration complete emails!

This is great for schools that want to include next steps for their specific enrollment processes, or welcome families back in their own, unique way!

Step One:

Under Settings > Content/Letters > Email and Text Templates, click Add New Template

Step Two:

Set the Type as Registration/Re-Registration, and finish your Template setup (if you have custom translations, remember to translate!), and Save

Step Three:

Under Settings > Schools/Programs > Manage Schools > Edit > Registration Settings, assign your new email(s)

DEMO

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Pro Tip: Bulk Email your New Students!

Under Application > Quick Filters, you can filter for Offered students!

After filtering, you can bulk email those parents to remind them that the registration window is open in an effort to guide them towards completing the form.

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Pro Tip: Bulk Email your Returning Students!

In your previous school year, under Registrations > Quick Filters, you can filter for Approved Registrations and Re-Registrations from last cycle!

After filtering, you can bulk email those parents to remind them that the re-registration window is open in an effort to guide them towards completing the form.
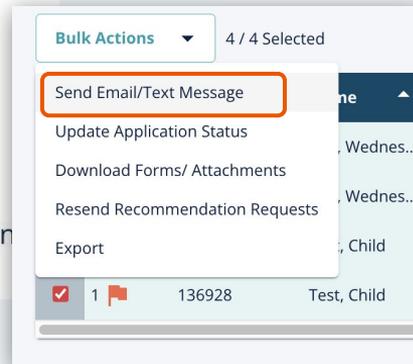

Filter by Status

Show Registrations:
- ☑ Submitted
- ☐ Not Submitted

With Status:
- ☑ Approved
- ☐ Denied
- ☐ In Processing

Bulk Actions — 4 / 4 Selected

- **Send Email/Text Message**
- Update Application Status
- Download Forms/ Attachments
- Resend Recommendation Requests
- Export

DEMO

Note: This is not applicable if you are in your first year in Enroll!

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Workflow Notifications

Manage Notifications

Add New Notification

Search by Notification or Email Template 🔍

Filter by Status: ☑ Enabled ☐ Disabled

Workflow Notification	Email Template	Sending To	Programs and/or Schools	Related To	Actions
Withdrawn Forms	Application Withdrawn (...	Registrars	All Programs	Applications	✏ 📋 🗑 Disable

Try out our Workflow Notifications!

Click Here to Learn More

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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.

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 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?

★ What are data points we were missing in previous years?

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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.
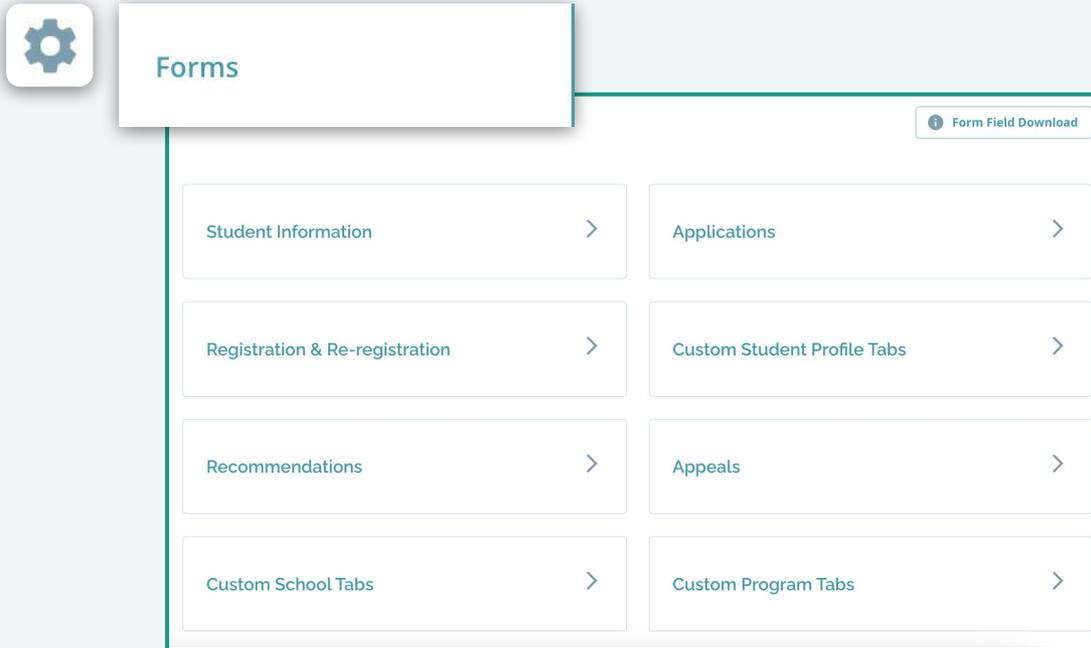
Settings

☑ ⓘ 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	>

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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 form will not impact the prior year's form.

EXCEPTION: Form fields saved to the <u>Student</u> 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 values

Step Management

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

Manage Form Steps

Back to Processes   **Add Form Steps**

1   Student Information   **Manage Fields**   ✏ 📄 🗑

2   Previous School Information   **Manage Fields**   ✏ 📄 🗑

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Step Settings

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

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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

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Step Settings

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

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Fields

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

Adding a New 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 Options

Max Character Length

Field Description/Note

Data Settings ⓘ

Save To *

Field Name *

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

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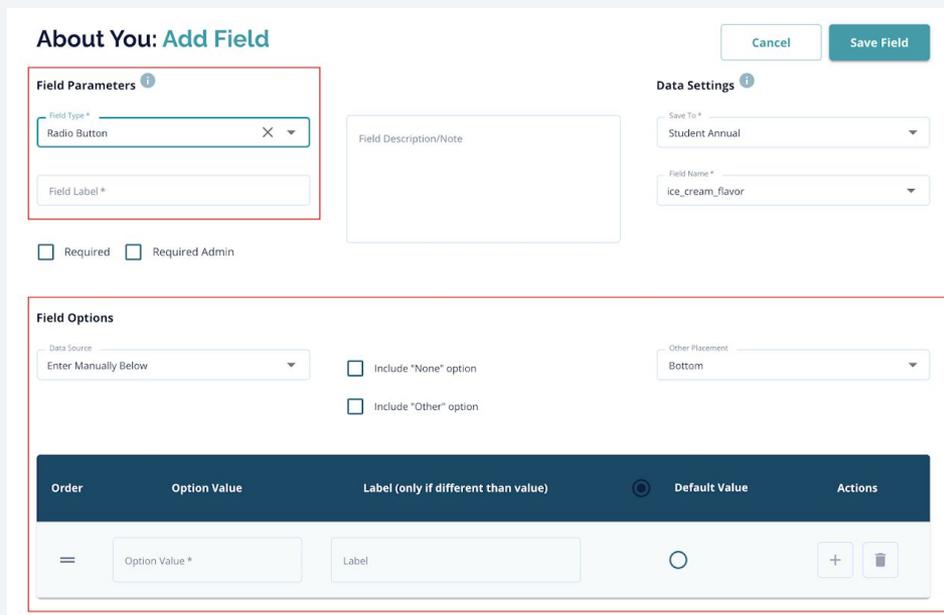
Field Options

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:

Field Options

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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.
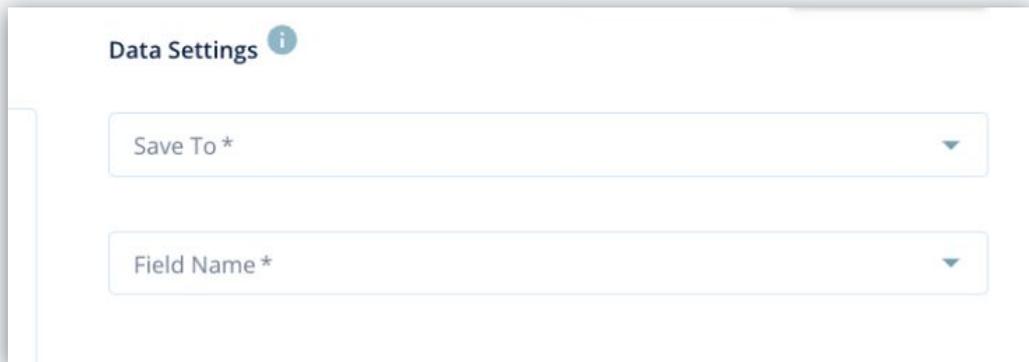
Data Settings ⓘ

Save To * ▼

Field Name * ▼

★ **Student Annual**

★ **Student**

★ **Registration**

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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

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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

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

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Translations

Translate Your Form

Settings > Forms > Registrations & Re-Registrations > Translate 🗛

Translate: Registration / Re-registration

ES

Registration / Re-registration

Form Process

Manage Steps

This is only necessary if you are NOT using Google Translate

English	Spanish
Registration / Re-registration	Translation

Choose a form step:

Student Information   Get Started ⌃

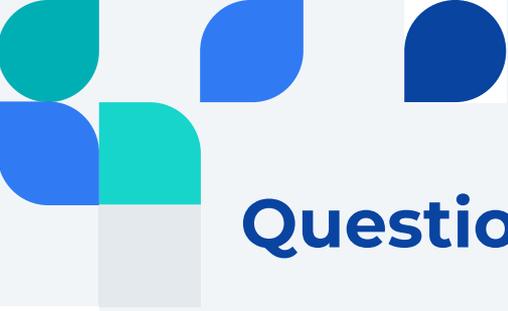| Form Step Name: **Student Information**	Spanish Translation
Student First Name	Spanish Translation
Student Last Name	Spanish Translation

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Testing Your Forms

Testing Registrations

We have a help resource that walks through how to test forms on your Sandbox site!

Click Here: How to Test on Sandbox

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Questions to Consider While Testing

★ **Are all required fields marked required?**
  ○ Does my SIS require this information for the student?
  ○ Do I need this data for reports I am using?
★ **Do you need to change how you captured data last season?**
  ○ Would another format (dropdown, radio buttons, etc.) make reporting and exporting your data easier?
★ **Do you need to update translations in your registration (for new instructions or fields)?**
  ○ Only necessary if you are NOT using Google Translate

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Q&A

Admin Resources

Zendesk

Help Articles

Webinar Calendar and Resources

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

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