



SchoolMint Enroll

Registration Management



Meet the Hosts



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Presenter



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Q&A



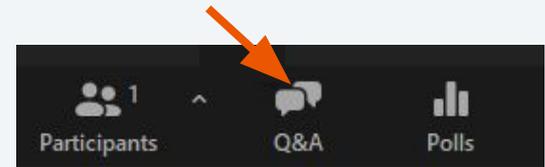
Logistics



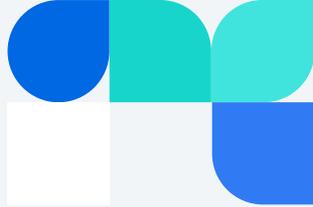
Slides, recording, and related resources will be shared in the follow up email tomorrow

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

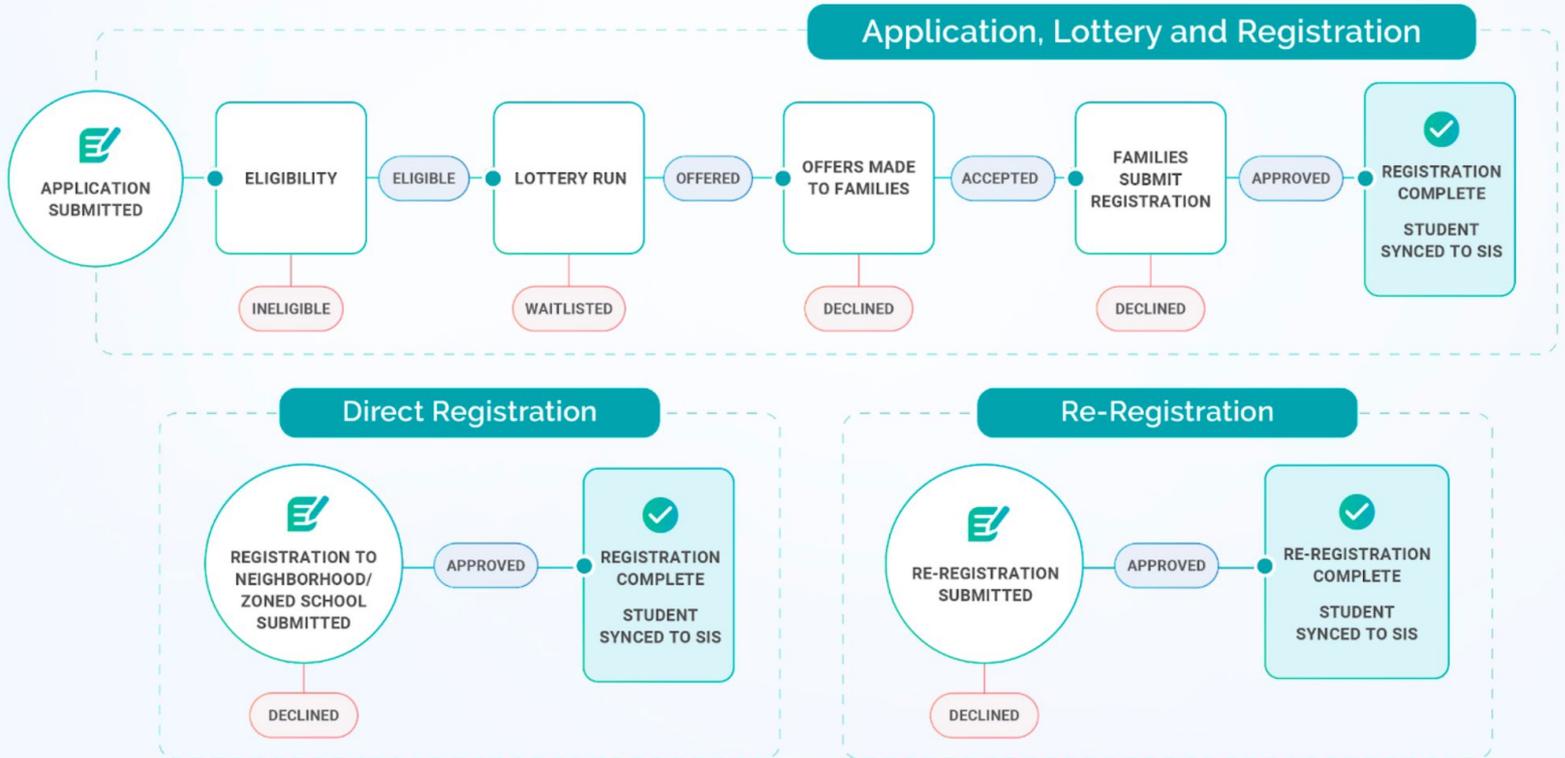


Today's Goals

- Using Quick Filters
- Flags
- Bulk updates
- Editing forms
- Troubleshooting



SchoolMint Enroll | Enrollment Flow



Registration:

Application + Registration Link



Registrations: Not Started

In the **Applications Module**, the *Not Started* filter will display applications with an Accepted lottery status that have not yet started the associated registration form.

Submission Date Range:

From  To 

Withdrawn:

Withdrawn

Not Withdrawn

Lotteries:

Lottery List Lottery Status

Registration:

Not Started

Registration: Manage



Registrations: Filtering

The registration module allows you to filter by various criteria such as submission & approval status, sync information, registration type, and flags. You can also create your own filters and views. Click the button below to learn more!

The screenshot displays a web interface for filtering registrations. At the top, there is a search bar labeled "Search by Student Name or ID" with a magnifying glass icon. To the right, there is a dropdown menu for "Apply Saved View", an edit icon, and three buttons: "Reset Filters", "Add Filters", and "Save View".

The main filtering area is divided into three columns:

- Filter by Status:**
 - Show Registrations:** Submitted, Not Submitted
 - With Status:** Approved, Denied, In Processing
 - Submission Date Range:** Two date pickers labeled "From" and "To".
 - Withdrawn:** Withdrawn, Not Withdrawn
 - Sync Status:** A dropdown menu labeled "Status".
 - Last Sync:** Two date pickers labeled "From" and "To".
- Filter by School Information:**
 - School Levels (dropdown)
 - School (dropdown)
 - Grade (dropdown)
 - Deliverables (dropdown)
 - Event (dropdown)
 - Type:** New Registration, Re-Registration
- Filter by Student Attributes:**
 - Flags (dropdown)
 - Student SIS Information:** Has SIS ID, Does Not Have SIS ID

At the bottom right, there is a prominent dark blue button with white text that says "Click Here: Create Dynamic Views". Below this button, there is a smaller "Apply Filters" button.

Registrations: Statuses

* Approved

* Denied

* In Processing
(default status)

Filter by Status
Show Registrations:

Submitted
 Not Submitted

With Status:

Approved
 Denied
 In Processing

Submission Date Range:
From

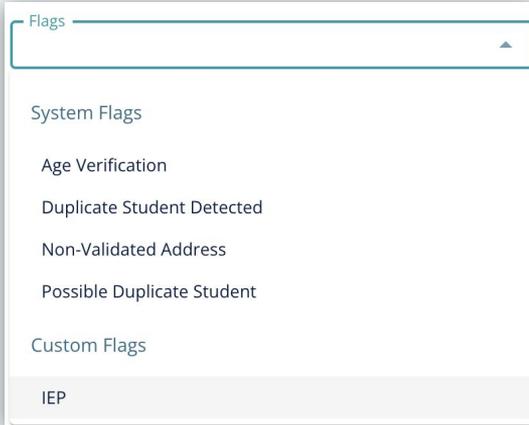
Filter by School Informa

School Levels
School
Grade
Deliverables

<input type="checkbox"/>	SM-2548607	Møss, Ma'leek	2015-07-07	Dogwood Elementary Sch...
<input type="checkbox"/>	313679	East, Jane	2014-02-03	Cedar Elementary School
<input type="checkbox"/> 2	SM-2542143	McCown, Ace	2013-03-03	Dogwood Elementary Sch...
<input type="checkbox"/>	SM-2443586	Marquez, Dora	2007-03-15	Elm High School

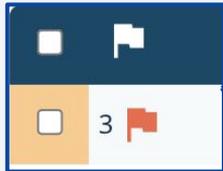
Registrations: Flags

Flags are a great way to isolate registrations 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



A screenshot of a 'Flags' dropdown menu. The menu is open, showing a list of flags. The 'System Flags' section includes 'Age Verification', 'Duplicate Student Detected', 'Non-Validated Address', and 'Possible Duplicate Student'. The 'Custom Flags' section includes 'IEP'. The 'IEP' option is highlighted with a light blue background.

[Click Here: Learn More](#)



Date/Time	Flag Message	Dismissed By	Dismissed
02/05/2024 12:24:52 PM	IEP/504 <i>Student indicated they have an IEP or 504 Plan</i>		<input type="checkbox"/>

Registration Flag: Associated Application

The Associated Application Status Updated flag will be assigned to a registration if its linked application has a status change.

10/01/2024 12:32:22 PM

Associated Application Status Updated

The status of this registration's associated application form has been updated, which may impact its eligibility.



The flag is triggered when an application is linked to a registration and...

- ★ The application is **withdrawn**
- ★ The application is **deleted**
- ★ The application is **declined** on lottery

Registrations: Custom Filters

If you need to filter for specific criteria that is not included in your Quick Filters, you can use the Add Filters option to create your own filters

Common Custom Filters

- ★ Upload field IS EMPTY or HAS VALUE
- ★ Income Data
- ★ Residency Data
- ★ Language Data

Apply Saved View  Add Filters Save View

Select a field and enter the value(s) you would like to filter this list by:

Match ANY ALL of the following conditions

Select Field Operator Expected Value

**Click Here:
Learn More**

Cancel

Registrations: Filtering Applications using Dynamic Views

Use the existing quick filters and then apply more filters on top of those using the rules engine.



Once a filter has been applied, the Save View button will activate.

Save View: Add New

Cancel Save View

General Information:

Name this View*

Access Settings

Private Report (only accessible to you)

Globally Available to All Users

Filters Applied:

Field	Operator	Value	Actions
iep	IS	Yes	<input type="button" value="edit"/> <input type="button" value="delete"/>

Quick Filters Applied: *Edit quick filters on the application dashboard.*

Field	Operator	Value
Application	IS	Submitted

You can now:

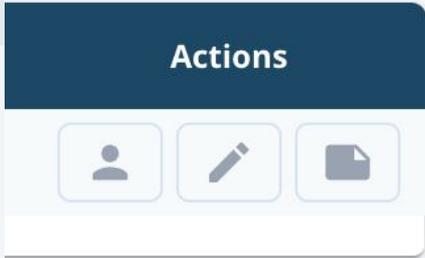
- Name the view.
- Set access settings to private or globally available.
- View all filters and edit dynamic filters that have been applied
- Manage Dashboard columns

Apply Saved View

Created by me:

- All Uploads Provided
- Deliverables View
- Lottery View
- Missing Uploads

Registration: Actions and Bulk Actions



- View Student Profile
- Edit Registration Forms
- View and Add Notes

Select **all** students or **specific** students

<input checked="" type="checkbox"/>	Student#	Full Name
<input checked="" type="checkbox"/>	317773	Bennett, Emmalise
<input checked="" type="checkbox"/>	SM-2443543	Blues, Jake
<input checked="" type="checkbox"/>	313679	East, Jane

Bulk Actions ▼ 5 / 5 Selected

- Send Email/Text Message
- Update Registration Status
- Download Forms/ Attachments
- Sync To SIS

Full Name
Amy Apple
Bobby Banana
Jane Doe

Registration: Editing a Student's Form

View or edit the application details by clicking the record's pencil icon.



Withdraw Sync to SIS View [Go to Student Profile](#)

Only **Admins with Edit Access** will be able to edit the Registration for students associated with their assigned school.

From here you can manage things like:

- Statuses
- Individual Syncing
- Form Information
- Change & Communication Logs

Register in:

Charles Dickens Elementary Re-Registration New Registration

Registration Status

Submission Submitted Not Submitted

Registration Status Approved Denied In Processing

Submitted On * 01/01/2024 12:00 AM Central Time

Click Here:
Delete vs. Withdraw

1. Student Information	Student First Name * Emmalise
2. Previous School Information	Student Last Name * Bennett
3. Guardian Information	Student Preferred Name
4. Housing Questionnaire	

Registration: Associated Application

The program name where the student has accepted a seat will display within the individual registration. If the associated application is declined, a warning will display within the individual registration for you to take the appropriate next steps per your enrollment process and policy.

Register in:

East West Middle

Accepted Seat at: [East West - IB Program](#)

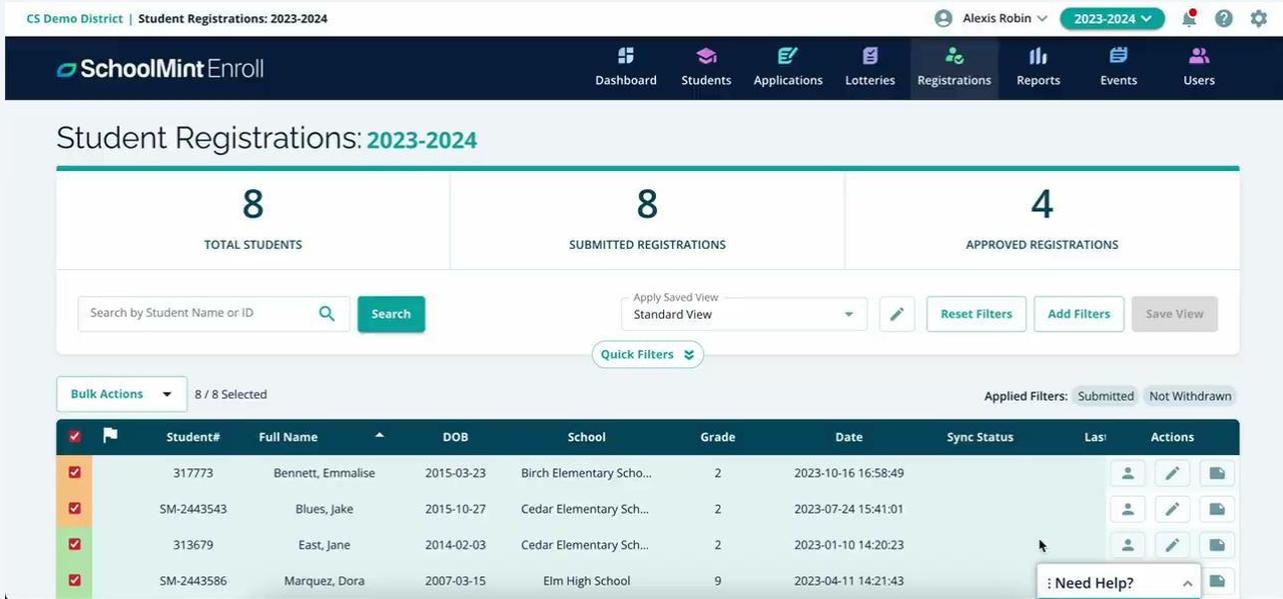
Register in:

Pup School

Seat was declined for: [Puppy School](#) ⚠️

Registrations: Editing Individual Forms

When clicking on [Edit](#)  you will be brought to the student's registration form.



CS Demo District | Student Registrations: 2023-2024

Alexis Robin | 2023-2024

SchoolMint Enroll

Dashboard | Students | Applications | Lotteries | Registrations | Reports | Events | Users

Student Registrations: 2023-2024

8 TOTAL STUDENTS | 8 SUBMITTED REGISTRATIONS | 4 APPROVED REGISTRATIONS

Search by Student Name or ID Apply Saved View: Standard View

Quick Filters

Bulk Actions: 8 / 8 Selected Applied Filters: Submitted | Not Withdrawn

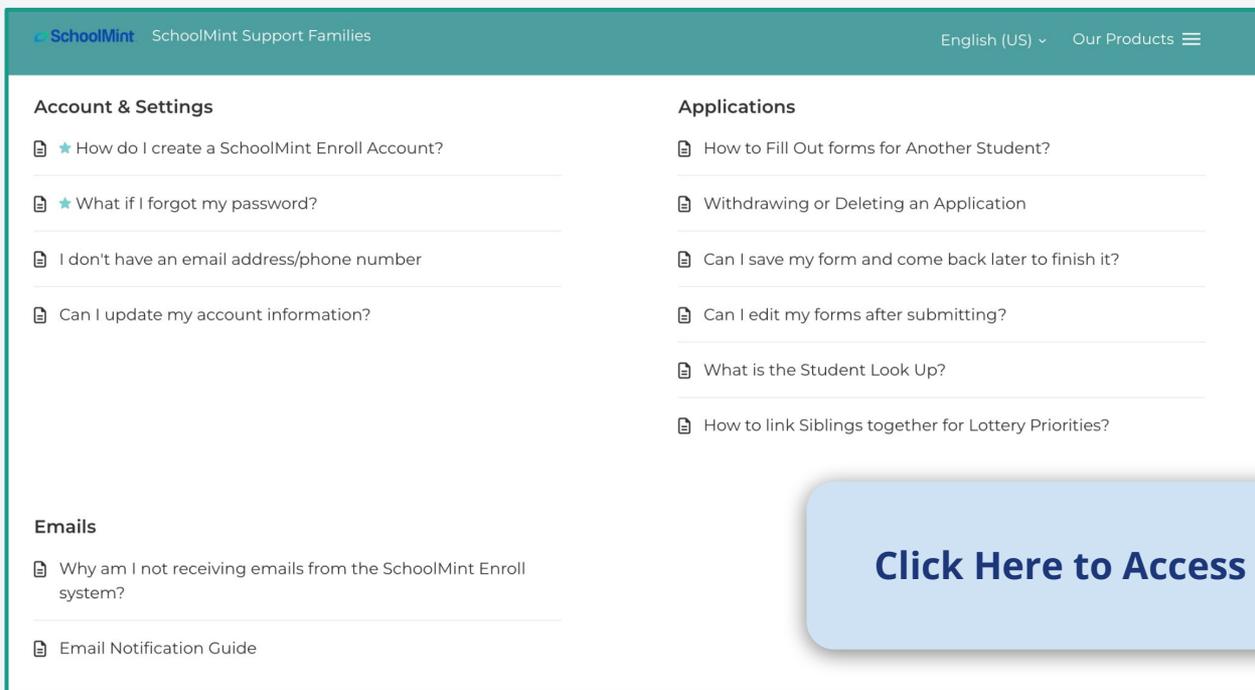
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Student#	Full Name	DOB	School	Grade	Date	Sync Status	Last	Actions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	317773	Bennett, Emmalise	2015-03-23	Birch Elementary Scho...	2	2023-10-16 16:58:49			<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Trash"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	SM-2443543	Blues, Jake	2015-10-27	Cedar Elementary Sch...	2	2023-07-24 15:41:01			<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Trash"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	313679	East, Jane	2014-02-03	Cedar Elementary Sch...	2	2023-01-10 14:20:23			<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Trash"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	SM-2443586	Marquez, Dora	2007-03-15	Elm High School	9	2023-04-11 14:21:43			<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Trash"/>

Registration: Troubleshooting



Registration: Guardian Help Articles

Did you know that you can link guardians to Enroll support articles specifically tailored for families applying/registering? Well, now you do!



The screenshot shows the SchoolMint Support Families help center interface. At the top, there is a header with the SchoolMint logo, the text "SchoolMint Support Families", and navigation options for "English (US)" and "Our Products". The main content area is divided into three columns of help articles, each with a document icon and a title:

- Account & Settings**
 - ★ How do I create a SchoolMint Enroll Account?
 - ★ What if I forgot my password?
 - I don't have an email address/phone number
 - Can I update my account information?
- Applications**
 - How to Fill Out forms for Another Student?
 - Withdrawing or Deleting an Application
 - Can I save my form and come back later to finish it?
 - Can I edit my forms after submitting?
 - What is the Student Look Up?
 - How to link Siblings together for Lottery Priorities?
- Emails**
 - Why am I not receiving emails from the SchoolMint Enroll system?
 - Email Notification Guide

[Click Here to Access Link](#)

Registration: Create a Guardian Account

{your subdomain}.schoolmint.com/signup

Please Enter Mobile Number or Email*

Preferred Communication *

Select At Least One*

Enable SMS Text Notifications

By enabling SMS Text notifications you agree to receive informational account messages such as application, registration and school lottery alerts, status updates, and important emergency alerts. Msg&data rates may apply. MsgFrequeVaries. Text HELP for help or STOP to opt-out. Powered by SchoolMint.

Enable Email Notifications

[Privacy Policy](#) [SMS Terms](#)



Create Account

Don't forget to sign out once completed

Registration: Login as Guardian

Users > Guardian Accounts > Login

An admin with access to login as a guardian can use this feature to assist a guardian with troubleshooting any issues they may be experiencing

Guardian Accounts

Update guardian account information.

Bulk Actions ▾

Search by Guardian Name, Email, or Phone Number 🔍

Search

0 / 18 Selected

<input type="checkbox"/>	ID	Guardians Name	Email	Phone	SSO	Actions
<input type="checkbox"/>	2477052	Alexis Lanier	alexis.robins@sch...			<input type="button" value="Log in"/>
<input type="checkbox"/>	2528840	Nancy Drew	nancy.drew@rea...			<input type="button" value="Log in"/>
<input type="checkbox"/>	2528842	Mildred Ratched	nurse.ratched@r...			<input type="button" value="Log in"/>

Registration: Submit as an Admin

Students > Profile > Registrations > Add Registrations

An admin with access to Edit Registrations can submit a form on the guardians behalf for a student

Student 2024-2025: Weasley, Ron Merge Change History Communications Log

- Profile
- Applications
- Registration**
- Address
- Notes

Student Registration

There is no registration for Ron Weasley in 2024-2025.
Click on "+ Add Registration" button to start a registration for this student.

+ Add Registration for Ron Weasley

[Need Help?](#)

Zendesk

Help Articles

Webinar Calendar and Resources

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Resources

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](#)

THANK YOU!

