



# SchoolMint Enroll 2.7

Target Date: May 27, 2025



# Enroll 2.7 Features

- Application Settings
- Ineligible and Decline Reasons for Applications
- Change Registering School
- School\_annual & program\_annual fields available for annual rollover
- Report Update
- Accessibility Update: Tooltips
- Internal Security Setting
- New! Recruitment module powered by Enroll
  - Interest Tracking via Leads Dashboard
  - Conversion Funnel through Application and Registration
  - Attribution to Marketing Campaigns
  - CRM Functionality to Email and Text Prospective Families



Feature Highlight

# Application Settings



# Application Settings

Application settings, previously located on an internal tab, are now available for admin control on a new Settings tab.

## Applications Settings

A new user permission, **Settings>Applications**, is available to assign permission to manage these settings.

Save Settings

Default Eligibility Status

In Processing

Enable Appeals

Remove Application Submission & Eligibility Statuses when Waitlist is Rolled Over

Allow Guardians to Submit Applications After Application End Date

Keep Submitted Timestamp Consistent Across All Applications for a Student

Require Admins to Enter an Ineligibility Reason

Select Data Source\*

Applicant Ineligibility Reasons

Include "Other" Option for Ineligibility Reason



Feature Highlight

# Ineligible and Decline Reasons for Applications



# Ineligible & Decline Reasons

Analyze and report on why applications are set to ineligible or why offers are declined.

**Set as Ineligible** ✕

Please confirm you want to set this application from Betty Greer at East West - IB Program to Ineligible.

Enter Reason\*

- Applicant did not meet one or more of the criteria
- Applicant did not meet residency requirements
- Applicant does not meet income verification requirements
- Applicant did not provide required information
- Other, Please Specify:

Choose from pre-built options (or add your own) when marking an application as ineligible or when a family declines a lottery offer.

Report on the reason provided to analyze trends:

- why applications are not eligible
- why guardians are declining offers

Program	ineligibility_reason
Amanda Hunt Puppy School	Applicant does not meet income verification requirements
Aurora Arecco Little Sprout PreK	Applicant did not provide required information
Aaron Berger Puppy School	Applicant did not meet one or more of the criteria
Aaron Berger Westbrook Leadership - Dual Language	Applicant did not meet residency requirements



Feature Highlight

# Change Registering School



# Change the Registering School

Streamline the process when changing a student's registering school.

**Change Registration School**

⚠️ When changing the registration school, the following will happen:

- **The registration to East West Middle will be withdrawn.**
- The registration to the new school will be created.
- The status of the new registration will default to "In Processing".
- Updates may require you to fill out additional information. Please review form steps marked in red for any missing required fields.
- Workflow notifications with a custom trigger for fields on the registration form will still be sent to guardians.

Change Registration to:

Select School \*

Pup School

- Westbrook Leadership Academy
- Alex Horn High
- North South High
- Iowa High School

Cancel Save New Registration

**No need to withdraw the original registration and re-submit a new one, Enroll does it for you. A new permission controls admin access to this action.**



Feature Highlight

# Added tables to roll over logic



# Additional tables included in annual roll over process

Manage Forms: 2024-2025

General

Schools/Programs

Date & Time

Manage Users

Applications

Manage Lotteries

Content/Letters

Custom Data

Forms

Workflow Notifications

### Advanced Placement: Edit

Cancel Save Field

**Field Parameters**

Field Type \*  
Checkbox

Field Label \*  
Advanced Placement

Field Description/Note

**Data Settings**

Save To \*  
Program Annual

Field Name \*  
advanced\_placement

Clear on Roll Over

**Field Options**

Data Source \*  
Enter Manually Below

Order	Option Value	Actions
=	Option Value * APArtDesign	+ -

School\_annual and program\_annual fields have been added to annual roll over logic.



Feature Highlight

# Report Update



# Updated platform content is displayed in Reports and Saved Views for field: ``lottery_ranking.lottery_list``

Updated content terminology will be displayed in place of “offered” or “waiting” in reports and dynamic views.

offered



PLACED

Bulk Actions 0 / 209 Selected

	App#	Full Name	Rank	Program	Grade	Priority	Sub Lottery	Lottery List
2	3518867	Adrienne Ponce	0	East West - IB P...	6	Multiple Priorities (2) <i>i</i>	1	waiting
2	3518868	Adrienne Ponce	0	East WestMiddle	6	No Priority	4	PLACED

Applications\_2025-04-30 09\_34\_40

App#	Full Name	Rank	Program	Grade	Priority	Sub Lottery	Lottery List
3518867	Adrienne Ponce	0	East West - IB Program	6	Competed Training, Multiple Sibs Enrolled	1	waiting
3518868	Adrienne Ponce	0	East WestMiddle	6	No Priority	4	PLACED



Feature Highlight


# Accessibility Updates



# Tooltip Behavior (Content on Hover or Focus)

## Updates

- Users can dismiss the tooltip by pressing the Escape key (without the need of a mouse)
- The tooltip itself is able to be hovered
  - to click a link in the tooltip text if necessary
  - and to prevent an enlarged cursor from covering the information

Registrants are unique students who came from a lead and have a submitted registration which has not been withdrawn or denied. 

## Registrants

## Who Benefits

- Users with low vision or cognitive disabilities will have adequate time to perceive additional content appearing on hover and to view the content with less distraction.
- Users with low vision who view content under magnification
- Users who increase the size of mouse cursors
- Users with low pointer accuracy will be able to more easily dismiss unintentionally-triggered content



Feature Highlight

# Security Update



# Security Update

## INTERNAL SETTING

A subset of pre-approved SchoolMint users will have access to your production site to support inquiries and investigations. All other SchoolMint staff are limited to your non-production instances.

SSO



Enable Custom SSO

This site contains production PII and is restricted to only necessary SchoolMint users.



PII Lock for SchoolMint users



Feature Highlight

# Recruitment

New module powered by SchoolMint Enroll



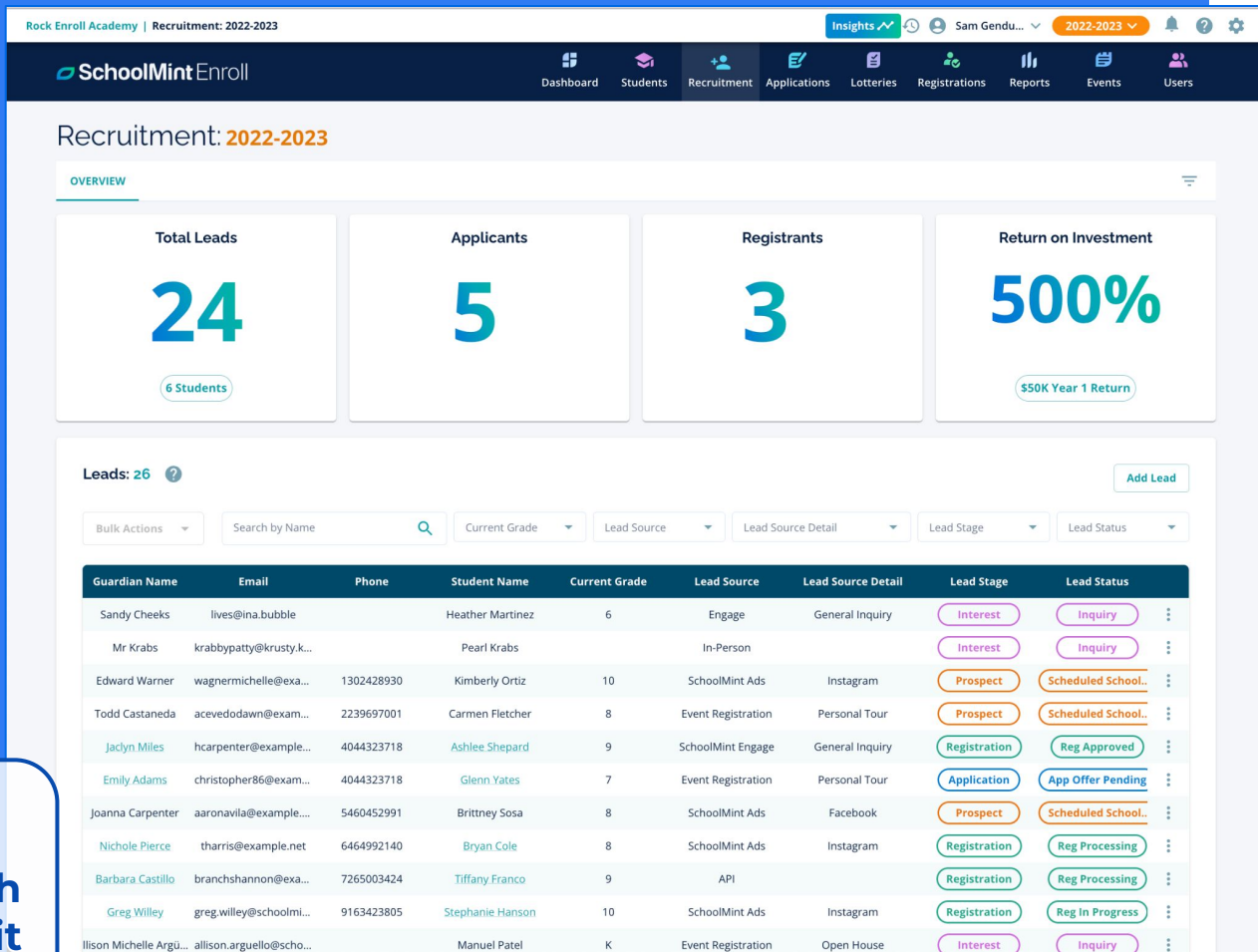
# SchoolMint Recruitment Dashboard

Gain visibility into leads generated by source (including those we generate for you and those you get on your own).

Conversion Funnel displays progression through application and registration.

ROI calculated to show the value in dollars of each recruitment effort.

Engage with families and connect them with schools that are best fit



Total Leads

24

6 Students

Applicants

5

Registrants

3

Return on Investment

500%

\$50K Year 1 Return

How many interested families go on to apply and register?

Filter Recruitment Data

Student Current Grade

Student Incoming Grade

Lead Source

SchoolMint Ads

Lead Source Detail

Facebook

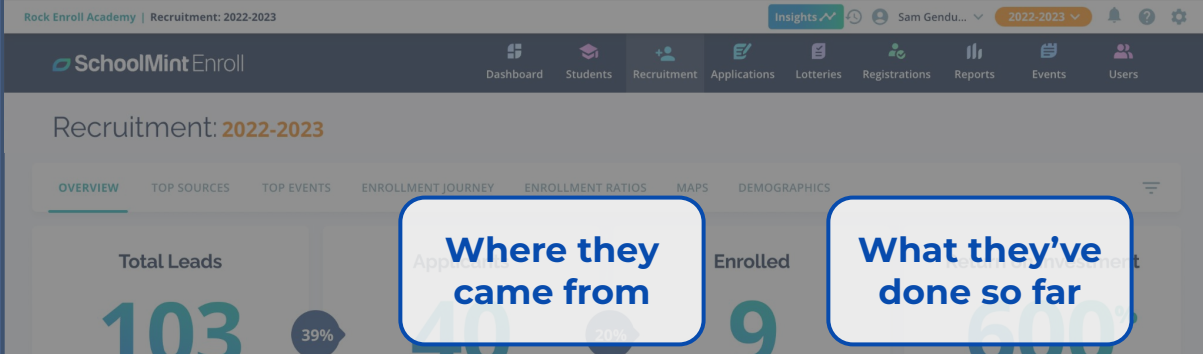
Clear

Apply Filters

Which outreach efforts are most effective in actually bringing in students?

# SchoolMint Recruitment Dashboard

Who they are



Where they came from

What they've done so far

Guardian Name	Email	Phone	Student Name	Current Grade	Lead Source	Lead Source Detail	Lead Stage	Lead Status
Edward Warner	wagnermichelle@example....	1302428930	Kimberly Ortiz	10	SchoolMint Ads	Instagram	Prospect	Scheduled School...
Todd Castaneda	acevedodawn@example.com	2239697001	Carmen Fletcher	8	Event Registration	Personal Tour	Prospect	Scheduled School...
<a href="#">Jaclyn Miles</a>	hcarpenter@example.org	4044323718	<a href="#">Ashlee Shepard</a>	9	SchoolMint Engage	General Inquiry	Registration	Reg Approved
<a href="#">Emily Adams</a>	christopher86@example.org	4044323718	<a href="#">Glenn Yates</a>	7	Event Registration	Personal Tour	Application	App Offer Pending
Joanna Carpenter	aaronavila@example.net	5460452991	Brittney Sosa	8	SchoolMint Ads	Facebook	Prospect	Scheduled School...
<a href="#">Nichole Pierce</a>	tharris@example.net	6464992140	<a href="#">Bryan Cole</a>	8	SchoolMint Ads	Instagram	Registration	Reg Processing

Engage with families and connect them with schools that are best fit

2,250 Leads! Text about what Unique leads mean should go here, same with Total Leads - What - Why - What can I do.

Bulk Actions	Current Grade	Lead Source	Lead Source Detail	Lead Stage	Lead Status	Contact			
<input type="checkbox"/>	Guardian Name	Student Name	2	Engage	General Inquiry Form	Application	Submitted	Yes	Actions
<input type="checkbox"/>	Guardian Name	Student Name	2	Digital Ad	Facebook Ad ID123	Interest	Attended Event	Yes	Actions
<input type="checkbox"/>	Guardian Name	Student Name	3	Digital Ad	Ad 342	Application	Waitlisted	Yes	Actions
<input type="checkbox"/>	Guardian Name	Student Name	3	Digital Ad	Lead Source Name	Application	Submitted	Yes	Actions
<input type="checkbox"/>	Guardian Name	Student Name	4	Engage	Lead Source Name	Application	Waitlisted	No	Actions
<input type="checkbox"/>	Guardian Name	Student Name	4	Digital Ad	Lead Source Name	Interest	Attended Event	No	Actions

# Add and Edit Leads

Manage prospective families throughout the journey.

Lead Information Lead Activity ✕

**i** Manual updates will not stop automatic stage or status changes if the student advances further in the enrollment process. dismiss

Guardian: **Ross Geller** Todd Castaneda Link Lead Information Guardian Profile

Ross's Students: Student Profile

**Carmen Fletcher**

**Lead Information**

Lead Stage & Status \* Prospect-Scheduled Sch...  
Lead Source \* School Website  
Lead Source Detail

**Guardian Information**

Guardian First Name \* Ross  
Guardian Last Name \* Geller  
Guardian Email \* no@account.yet  
Guardian Phone

**Student Information**

Student First Name Carmen  
Student Last Name Fletcher  
Student Date of Birth 10/18/2005  
Current School Springfield Elementary  
Current Grade 8  
Incoming Grade 9

Close Save Lead Information

# Activity Log

View and filter on the history of activities (e.g. conversations with the family, events attended, updates to the student's enrollment status).

Log additional activities at any time.

### Lead Information Lead Activity

Activity Type  Created By  Guardian Name  Student Name  [Log an Activity](#)

Date & Time	Created By	Guardian Name	Student Name	Activity Type	Activity Message
04/29/2025 04:03 PM	Sam Genduso	Ross Geller	Carmen Fletcher	Voicemail Left	Left a voicemail for Ross about Carmen's enrollment
04/29/2025 03:48 PM	Sam Genduso	Ross Geller	Carmen Fletcher	Inquiry	New Inquiry Created
02/05/2025 08:36 AM	System	Todd Castaneda		Stage Changed	Stage changed from Prospect to Declined
02/05/2025 08:36 AM	System	Todd Castaneda		Status Changed	Status changed from Attended Event to Not Interested
01/27/2025 07:13 PM	System	Todd Castaneda	Carmen Fletcher	Stage Changed	Stage assigned to Prospect
01/27/2025 07:13 PM	System	Todd Castaneda	Carmen Fletcher	Status Changed	Status assigned to Scheduled School Admin Call
01/27/2025 07:13 PM	System	Todd Castaneda	Carmen Fletcher	Inquiry	
01/27/2025 07:13 PM	System	Todd Castaneda		Stage Changed	Stage changed from Interest to Prospect
01/27/2025 07:13 PM	System	Todd Castaneda		Status Changed	Status changed from Contacted to Attended Event
01/27/2025 07:09 PM	System	Todd Castaneda		Stage Changed	Stage changed from Interest to Prospect
01/27/2025 07:09 PM	System	Todd Castaneda		Status Changed	Status changed from Contacted to Attended Event
01/27/2025 07:09 PM	System	Todd Castaneda		Inquiry	

[Close](#)

# Communication

Email and text guardians directly at every stage.

Quickly spot families that need attention.

Manage Leads: 2,250

Bulk Actions | Current Gra... | Source | Source Detail | Stage | Status | Last Contact Before | Last Contact After

	Guardian Name	Student Name	Current Grade	Lead Source	Lead Source Detail	Lead Stage	Lead Status	Last Contact
<input type="checkbox"/>	Add ellipses to long...	Student Name	2	Engage	Add ellipses to long nam...	Application	Submitted	9/30/24 at 12:32 PM
<input checked="" type="checkbox"/>	Guardian Name		2	Digital Ad	Facebook Ad ID123	Interest	Attended Event	9/17/24 at 9:12 AM
<input checked="" type="checkbox"/>	SchoolMintEnroll						Waitlisted	9/16/24 at 10:00 AM
<input type="checkbox"/>	Attract Dash						Submitted	8/28/24 1:05 PM
<input type="checkbox"/>	OVERVIEW						Attended Event	8/25/24 3:15 PM

### Bulk Communication to Leads

Select message type:

Select Message Template  
 Select a Template  
 Application status update notification templ...

Create One Time Message

Message Content and Language Translations

ENG SPA CHI FRE PHI VIET KOR GER ARB RUS

Text Message: Enter Text Message\*  
160 characters remaining in your text message.

Email Message: Enter Email Subject Line

Email replies will be sent to this address

[Add Variables](#)

Formats | A | I | B | U | E | L | R | G | P | I

Enter Email Message

Cancel | Send Message



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Release Notes available the evening of May 27, 2025