

Mid Schoolroll

Finalizing Registration Data



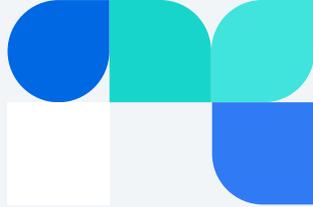
Meet the Hosts



Alexis Lanier
Sr. Professional Services Specialist
Presenter



Victoria Coutee
Customer Solutions Specialist
Q&A



Today's Goals

- Process Student Registration Statuses
- Update Retained vs Promoted Students
- Finalize Lottery Lists
- Looking at Your Data



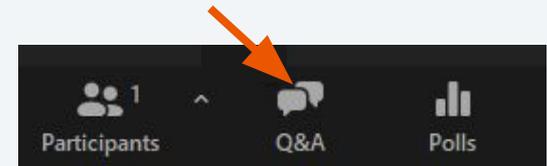
Logistics



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

Data Cleanup



Keep Up with Lottery Lists

Review lottery lists and statuses to ensure your lists are being updated, seats are being filled, and students aren't sitting in pending statuses.

NOTE:

If you are rolling over wait lists, finalizing your lottery before roll over is crucial!

Grade: 2

OFFERED LIST *1 Assigned, 0 Seat(s) Available* Publish by Grade

Rank	ID#	Student Name	Expiration Date	Status	Sub-Lottery	Weight	Score	Priority	Published	Actions
	2531504	East,west, Jane	06/16/2025+10:00-A		1	1	-	Multiple Priorities (2)	<input checked="" type="checkbox"/> Yes	
1	7268893	Carlson, Claire			1	1	-	Multiple Priorities (3)	<input type="checkbox"/> No	

WAITING LIST *7 Waitlisted* Bulk Offer

Rank	ID#	Student Name	Status	Sub-Lottery	Weight	Score	Priority	Published	Actions
1	2443543	Blües, Jake		1	1	-	Multiple Priorities (3)	<input checked="" type="checkbox"/> Yes	
2	6639929	Smith, Amber		1	1	-	Sibling Applying	<input checked="" type="checkbox"/> Yes	
3	7186288	East, South		1	1	-	Multiple Priorities (3)	<input checked="" type="checkbox"/> Yes	
4	2531507	West, Katie		2	1	-	Multiple Priorities (2)	<input checked="" type="checkbox"/> Yes	

Keep Processes In Sync

If a submitted registration has an application that has been withdrawn, or lottery seat that has been declined, admins may want to take action on the registration form like reviewing, declining, or withdrawing.

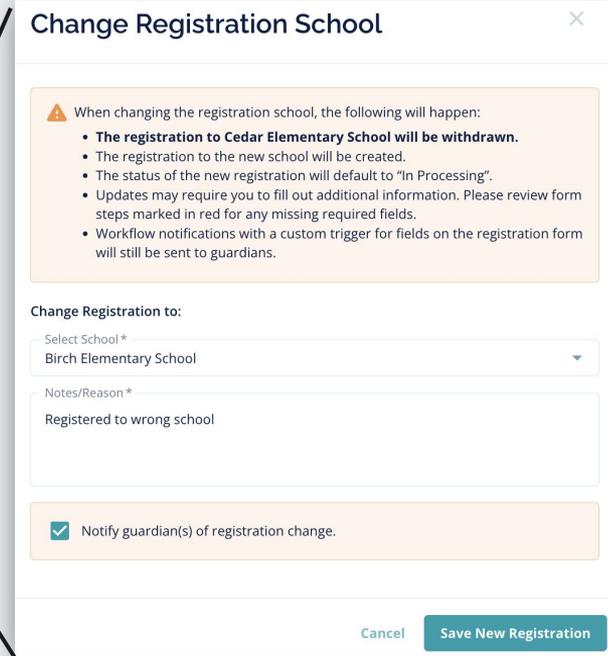
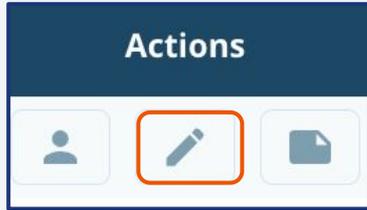
1	1	0								
TOTAL STUDENTS	SUBMITTED REGISTRATIONS	APPROVED REGISTRATIONS								
<input type="text" value="Search by Student Name or ID"/> <input type="button" value="🔍"/>										
Apply Saved View: Associated Application Updated <input type="button" value="✎"/> <input type="button" value="Reset Filters"/> <input type="button" value="Add Filters"/> <input type="button" value="Save View"/> <input type="button" value="Apply Filters"/>										
<input type="button" value="Quick Filters"/> <input type="button" value="📄"/>										
Bulk Actions: 0 / 1 Selected Applied Filters: Submitted Not Withdrawn Flags: Associated Application Status Updated										
Student#	Full Name	DOB	School	Grade	Date	App Submitted	App Withdrawn	Lottery List	Accepted Status	Actions
313679	Eastwest, Jane	2014-02-03	Cedar Elementar...	2	2023-01-10 14:20...	Submitted	Not Withdrawn			

Use These "OR" Filters

- ★ `application.status ≠ 1`
- ★ `application.submitted = 0`
- ★ `application.withdrawn = 1`
- ★ `lottery_ranking.lottery_list ≠ offered`
- ★ `lottery_ranking.accepted ≠ 1`

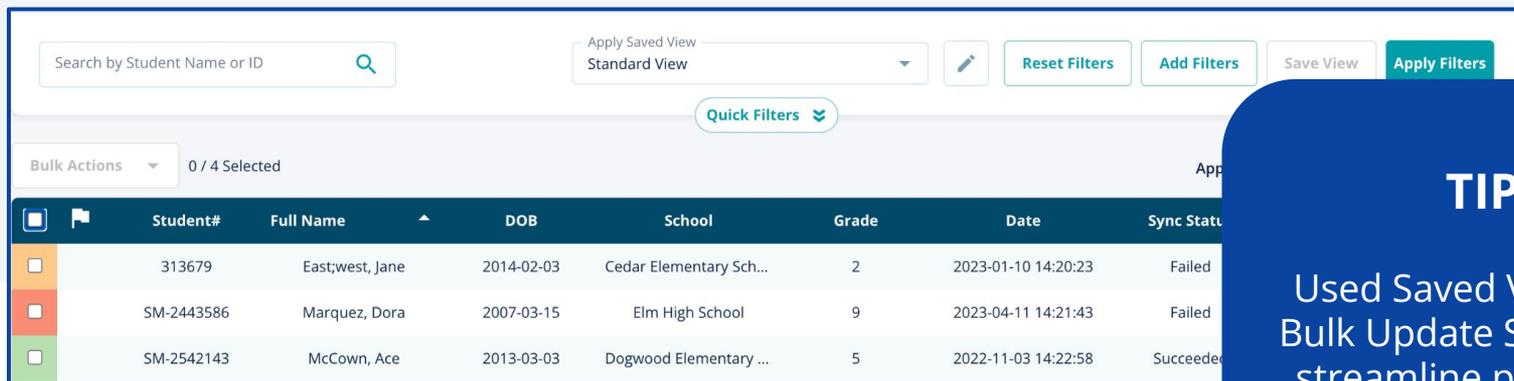
Assessing Registered Schools

Some schools have less restrictions around submitting registrations forms, which may result in guardians submitting a form for the wrong school. Admins can update the registered school in the Edit area of the form.



Update Registration Statuses

Think of registration statuses as a way to measure and report. It's not just a tag—it tells you what your next move is with that student or family.



<input type="checkbox"/>	Student#	Full Name	DOB	School	Grade	Date	Sync Status
<input type="checkbox"/>	313679	East;west, Jane	2014-02-03	Cedar Elementary Sch...	2	2023-01-10 14:20:23	Failed
<input type="checkbox"/>	SM-2443586	Marquez, Dora	2007-03-15	Elm High School	9	2023-04-11 14:21:43	Failed
<input type="checkbox"/>	SM-2542143	McCown, Ace	2013-03-03	Dogwood Elementary ...	5	2022-11-03 14:22:58	Succeeded

TIP:

Used Saved Views and Bulk Update Statuses to streamline processing times!

Update Retained and Skip a Grade

This can be manually updated for students, or you can import this data through an ad-hoc student import. You want to do this before you begin your roll over.

Student Profile

Student ID: 2531504

First Name *	Middle Name	Last Name *
Jane		East;west
SIS Student ID	Birthdate *	
313679	02/03/2014	
2022-2023 School	2022-2023 Grade	
Birch Elementary School	1	
Student Type	2023-2024 Grade	
Returning	2	
<i>(for 2023-2024 school year)</i>		
SIS Enroll Status	<input checked="" type="checkbox"/> Retained	
Transferred Out	<input type="checkbox"/> Skip a Grade	
<i>(for 2023-2024 school year)</i>		

Fields:

Both fields are stored in the `student_annual` record

- **retained = 1**
- **promoted = 1**

Communication Plans

Utilize filters to create Saved Views to help assign next steps, send communications, and have action plans moving into the new year.

**Who still needs
welcome info, supply
lists, summer learning
resources?**

**Who needs a follow-up
call because they're
incomplete or
unapproved?**

Data Review



Funnel Metrics

Every drop-off in the funnel is a clue. Was the form too long? Were families confused about next steps? Use this to find friction points and improve next year's experience.

How many started registration but didn't finish?

How many submitted but never got approved?

How many received an offer but didn't submit a registration?

Key Metrics to Capture

Funnel Stage

What to Look At

Where to Find Data

Interest in Registering

Count of all records that started or completed registration

Filter by status: *Not Submitted* AND *Submitted*

Registration Submitted

Count of families who submitted all required fields

Filter by status: *Submitted*

Approved

Final step—students marked as *Approved*

Filter by status: *Approved*

Declined, Withdrawn, or Incomplete

Who started but didn't finish

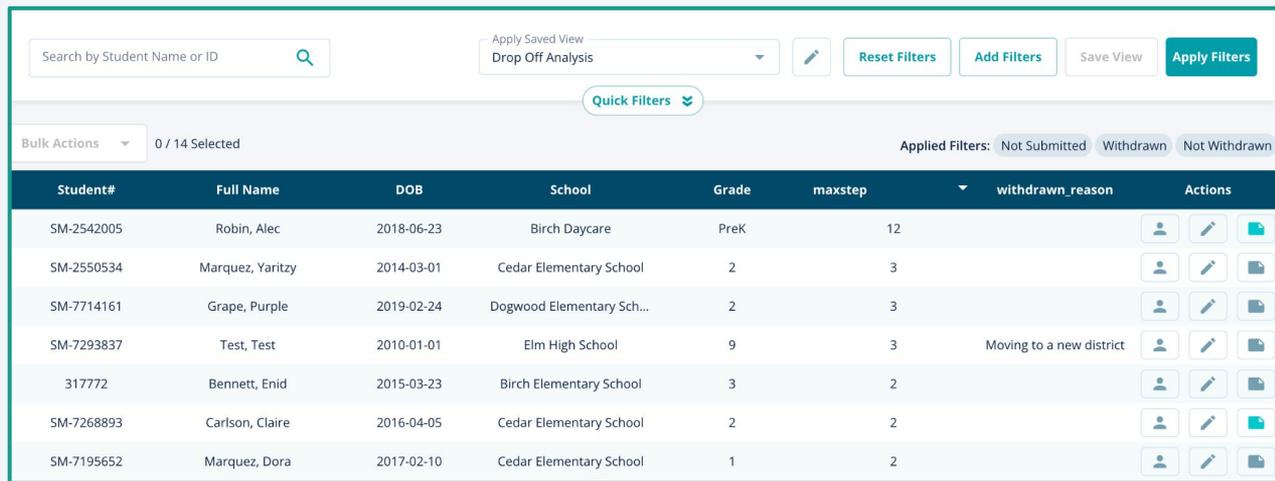
Filter by status: *Not Submitted*, *Withdrawn*, OR *Declined*

Drop Off Analysis

Compare *Not Submitted* and *Withdrawn* forms to find key friction points.
Example: *If 300 families started but only 180 finished, where did they stop?*

TIP:

Use Registration Max Step and Withdrawn Reason to determine if there is a trend in where or why families aren't continuing.



Search by Student Name or ID

Apply Saved View: Drop Off Analysis

Quick Filters

Bulk Actions 0 / 14 Selected Applied Filters: Not Submitted | Withdrawn | Not Withdrawn

Student#	Full Name	DOB	School	Grade	maxstep	withdrawn_reason	Actions
SM-2542005	Robin, Alec	2018-06-23	Birch Daycare	PreK	12		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
SM-2550534	Marquez, Yarityz	2014-03-01	Cedar Elementary School	2	3		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
SM-7714161	Grape, Purple	2019-02-24	Dogwood Elementary Sch...	2	3		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
SM-7293837	Test, Test	2010-01-01	Elm High School	9	3	Moving to a new district	<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
317772	Bennett, Enid	2015-03-23	Birch Elementary School	3	2		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
SM-7268893	Carlson, Claire	2016-04-05	Cedar Elementary School	2	2		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>
SM-7195652	Marquez, Dora	2017-02-10	Cedar Elementary School	1	2		<input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑️"/>

Conversion Rates

Divide Registration Approved count by Lottery Offers. This helps assess overall enrollment yield and guide target setting.

The image shows two screenshots of a SchoolMint dashboard. The top screenshot displays registration statistics: 2 Total Students, 2 Submitted Registrations, and 2 Approved Registrations. The bottom screenshot displays application statistics: 12 Total Students, 12 Total Applications, and 12 Submitted Applications. Both screenshots include search bars, filters, and bulk action options.

Registration Statistics	Application Statistics
2 TOTAL STUDENTS	12 TOTAL STUDENTS
2 SUBMITTED REGISTRATIONS	12 TOTAL APPLICATIONS
2 APPROVED REGISTRATIONS	12 SUBMITTED APPLICATIONS

Example:

- **2** Approved Registrations
- **12** Offered seats

That puts my conversion rate at **16%**

Time to Approval

Sort by "Date Submitted" vs "Status Timestamp" to see how long it takes admins to complete processing forms. Are there big lags?

3		3		2									
TOTAL STUDENTS		SUBMITTED REGISTRATIONS		APPROVED REGISTRATIONS									
<input type="text" value="Search by Student Name or ID"/>		Apply Saved View Time to Approval		Reset Filters		Add Filters		Save View		Apply Filters			
Bulk Actions		0 / 3 Selected		Quick Filters		Applied Filters: Denied		Approved		Submitted		Not Withdrawn	
Student#	Full Name	DOB	School	Grade	Date	Status Timestamp	Actions						
SM-2542143	McCown, Ace	2013-03-03	Dogwood Elementary Sch...	5	2022-11-03 14:22:58	2023-02-15 18:45:46	  						
SM-2548607	Møss, Ma'leek	2015-07-07	Dogwood Elementary Sch...	2	2022-11-29 13:37:44	2025-06-04 12:02:36	  						
SM-2443586	Marquez, Dora	2007-03-15	Elm High School	9	2023-04-11 14:21:43	2025-07-22 10:50:48	  						



Gap Assessments

This is where equity and access come into view. Are there groups who aren't getting all the way through the process? Are some grades consistently under-enrolled? Use this info to guide targeted outreach.

Are there grades that are consistently under enrolled?

Who's registering—and who's not—by zip code, language, or program type?

Are certain groups stalling out at specific points?

Key Metrics to Capture

Category	Columns to Filter/Group By	Insights to Pull
Grade Level	Grade Level + Registration Status	Are certain grades lagging behind others in registration or approval?
Campus	Submitted Status + Schools	Do some schools have lower completion rates?
Program Type	SPED, ELL, or other tags	Are any special populations underrepresented or delayed?
Geography	Zip Code or Neighborhood	Which areas aren't converting—do they need targeted outreach?
Language	Preferred Language or Home Language	Are certain language groups more likely to be incomplete or unapproved?

Gap Analysis

Compare *Not Submitted* and *Withdrawn* forms with demographic data like Language, Zip Codes, etc.

14		0		0						
TOTAL STUDENTS		SUBMITTED REGISTRATIONS		APPROVED REGISTRATIONS						
Search by Student Name or ID <input type="text"/>		Apply Saved View Gap Analysis <input type="text"/>		<input type="button" value="Reset Filters"/>	<input type="button" value="Add Filters"/>	<input type="button" value="Save View"/>	<input type="button" value="Apply Filters"/>			
Bulk Actions <input type="text"/> 0 / 14 Selected		Quick Filters <input type="text"/>		Applied Filters: <input type="button" value="Not Submitted"/> <input type="button" value="Withdrawn"/> <input type="button" value="Not Withdrawn"/>						
<input type="checkbox"/>	Student#	Full Name	DOB	School	Grade	Student Language	Guardian Language	ZIP	Actions	
<input type="checkbox"/>	1	SM-7714161	Grape, Purple	2019-02-24	Dogwood Elementa...	2	en	en	70501	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Print"/>
<input type="checkbox"/>		SM-7293837	Test, Test	2010-01-01	Elm High School	9	en	en	70115	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Print"/>
<input type="checkbox"/>	1	SM-7268893	Carlson, Claire	2016-04-05	Cedar Elementary S...	2	en	es	70503	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Print"/>
<input type="checkbox"/>		SM-7195652	Marquez, Dora	2017-02-10	Cedar Elementary S...	1	es	es	70503	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Print"/>

Equity Analysis

See if any demographics are consistently underrepresented in Approved statuses. Additionally, you can use this data to adjust family supports, translations, or communication timing.

2		2		2						
TOTAL STUDENTS		SUBMITTED REGISTRATIONS		APPROVED REGISTRATIONS						
Search by Student Name or ID <input type="text"/>		Apply Saved View Equity Analysis <input type="text"/>		<input type="button" value="Reset Filters"/> <input type="button" value="Add Filters"/> <input type="button" value="Save View"/> <input type="button" value="Apply Filters"/>						
Bulk Actions <input type="text"/> 0 / 2 Selected		Quick Filters <input type="text"/>		Applied Filters: <input type="button" value="Approved"/> <input type="button" value="Submitted"/> <input type="button" value="Not Withdrawn"/>						
Student#	Full Name	DOB	School	Grade	race	Hispanic	gender	Student Language	zip	Actions
SM-2542143	McCown, Ace	2013-03-03	Dogwood Elemen...	5	BlackAfricanAme...	Yes	Male	es	70501	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Export"/>
SM-2548607	Møss, Ma'leek	2015-07-07	Dogwood Elemen...	2	BlackAfricanAme...	No	Male	en	70508	<input type="button" value="User"/> <input type="button" value="Edit"/> <input type="button" value="Export"/>

Seat Tracker

Reports: 2021-2022

Seat Tracker is located in the Reports area

Other Reports

Seat Tracker

To manage Seat Tracker numbers click Seat Tracker.

East West Middle

East West Middle - Dual Language - Choice Schools

Grade	Capacity 	Returning Students 	Lottery Seats Filled 	Seats Available 	Lottery Cutoff 
5	2	0	0	2	1
6	2	2	1	-1	3
7	1	0	0	1	4
Total	5	2	1	2	8

East West Middle

East WestMiddle - Neighborhood Schools

Grade	Capacity 	Returning Students 	Lottery Seats Filled 	Seats Available 	Lottery Cutoff 
5	1	0	0	1	6
6	1	0	0	1	5
7	1	0	0	1	4
8	2	0	0	2	6
Total	5	0	0	5	21

Next Enroll 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](#)

Next Enroll Webinar

Transition to the New Year

- Reviewing your data
- Prepare your Platform for Roll Over
- Tips for Rolling Over

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Admin Resources

Q&A

Survey



THANK YOU!



Mi Schollroll

