



# SchoolMint Enroll

## Rollover 101



# Meet the Host



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**Sr. Customer Experience Manager**  
**Presenter**



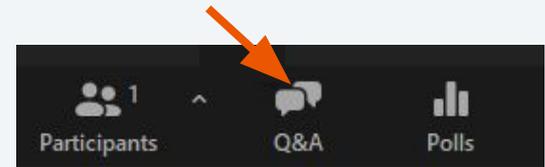
# Logistics



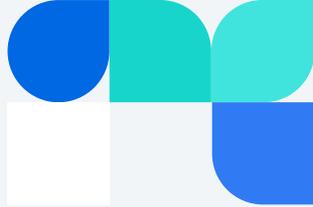
Slides, recording, and related resources will be shared in the follow up email tomorrow

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

- Understand transition process between enrollment cycles
- Review Rollover settings
- Minimize disruptions and maximize efficiency





# Roll Over: The Basics

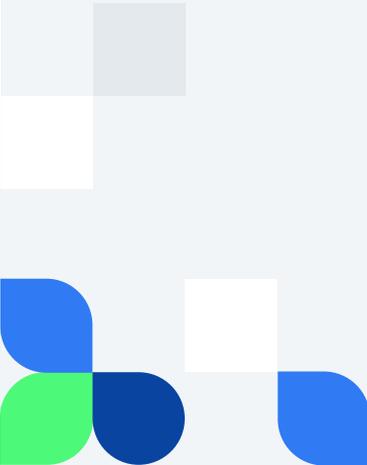




# What is Roll Over?

Roll over is the process that is utilized to create a new school year in the Enroll platform. During this process, all of the year-specific information from the current year is copied to the next year. This includes all setup (like schools, programs, and forms), students, and more!

This helps with ensuring that historical data is stored. For example, a student's address may change from one year to the next. With year-specific data, we are able to store their original address in one school year, and then when the new school year is created with the roll over, new address data can be captured! Admins can flip between those school years in order to see old and new data at any time.



# User Access

Ensure the user permissions to access running the rollover are enabled for the appropriate user(s)

Settings

-  Schools / Programs
-  Lottery
-  General
-  Manage Forms
-  Content & Letters
-  Custom Data
-  Roll Over

In order for a user to roll over the system, they must be part of a user group that has the "Roll Over" user permission enabled.

By default, all Super Admin user groups will have this setting enabled



# What should I keep in mind throughout the roll over process?

- The roll over is a one-time process per year and should occur when you are ready to add a new year to your platform
- The roll over will copy data from the current year into the next year.
- After the rollover process is complete, no annual data entered in the previous year will copy over to the next year.



# When Should I Roll Over?

We recommend giving yourself **at least two weeks** to do all the prepare steps, roll over, and complete any changes needed before opening your next school year, however this can vary by organization depending on what is needed.

Another thing to consider is if you have Registrations, you may want to do this after you have **closed Registrations** and **processed all Registrations**. This is because new students who are in an **Approved** status will automatically roll over as **Returning**. Students still In Processing, or who have not submitted a Registration **at the time of Roll Over** will still be marked as **New** in the new year.

- However, if you have **overlapping** open form dates from the previous year and the new year, you will most likely just need to keep track of those students accordingly - consider using **Workflow Notifications** to keep track of those students.

**Build a Workflow Notification**

# What Data Rolls Over?

## Students

**Students Grades**  
increment by 1 (unless retained/promoted)

**Student type updated**  
to Returning (if registration approved)

**Sibling**  
designations/associations

**Form steps, fields, and settings** (including translations)

**Annual program & school settings**

**Application dates** (incremented by a year)

**Events (not sessions)**

**Registration dates** (incremented by a year)

**Lottery setup**

**Waitlisted students and waitlisted applications** (when enabled)

**Sync Service Mapping**

# What Data Doesn't Roll Over?

**Registration &  
Application  
Records**

**Event sessions**



Note: If you roll over waitlisted students AND do not want to remove the statuses of waitlisted applications, those application records do roll over

**All signature  
fields**

**Any form fields  
set to clear on  
rollover**

# Remember:

All data from previous school years will remain accessible using the school year drop-down at the top right of the screen. No data will be removed from existing school years during this process.

2024-2025 ▾

School Year

2023-2024

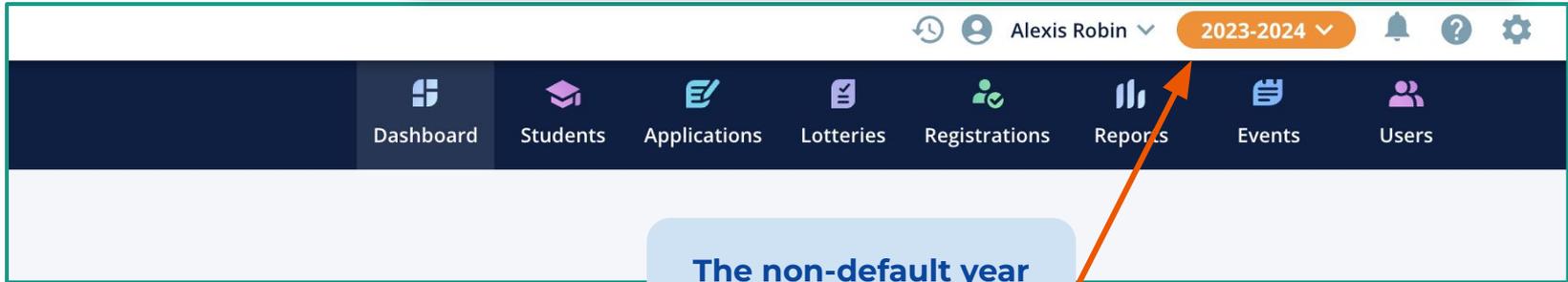
2024-2025

# Preparing for Roll Over



# Step 1. Current School Year

Make sure you are in the latest year in the school selector at the top of the page



The non-default year will be orange



## Step 2. Clear on Roll Over Fields

Review the “clear field on rollover” settings in the form(s)

- If you have any data fields in your form process that you do not want to copy to the next year, then you will need to enable the "Clear on Roll Over" checkbox on that specific field.

**Clear on Roll Over  
determines if data  
pre-populates  
next year**

**Fields saved to the  
Student record  
will NOT clear**

**Clear on Rollover  
enabled on ONE  
form will clear on  
ALL forms**

**Signature fields are  
always cleared!**

Other 



Clear on Roll Over



# Pro Tip: Form Field Download

Use the Form Field Download button to review all fields across all of your forms to confirm which fields have been marked to "clear data on roll over".



Create and manage forms used in the enrollment process.

**Form Field Download**

Student Information >

Applications >

# Step 4. Roll Over Waiting Lists

If waitlists should roll over into the new year, enable the rollover waitlists setting in global lottery settings, program lottery settings, and Application settings



## Waiting List

- Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)
- Roll over waiting lists when the school year is rolled over

## Waiting List

- Roll over waiting lists when the school year is rolled over
- Auto-roll up applications from waiting list to offered list (when offered list is declined)

Default Eligibility Status

In Processing



Allow Guardians to Submit Applications After Application End Date



Enable Appeals



Keep Submitted Timestamp Consistent Across All Applications for a Student



Remove Application Submission & Eligibility Statuses when Waitlist is Rolled Over



Require Admins to Enter an Ineligibility Reason

# Step 5. Students Retained or Skip a Grade

By default, students will be promoted by one grade level during the rollover process. Admins can determine if a student should instead be retained or promoted.

**Tip: You can use a Student Import to update these statuses in bulk**

- retained = 1
- promoted = 1

**Click Here:  
Ad Hoc Student Import**

## Student Profile

Student ID: 7672684

First Name*	Middle Name	Last Name*
Elizabeth		Bennet
SIS Student ID	Birthdate*	
10002	02/02/2019	
2023-2024 School		
Charles Dickens Elementary		
Student Type	2023-2024 Grade	2024-2025 Grade
Returning		K
<i>(for 2023-2024 school year)</i>		
SIS Enrollment Status	<input checked="" type="checkbox"/> Retained <input type="checkbox"/> Skip a Grade	
<i>(for 2023-2024 school year)</i>		

# Step 6. Disable Sync Imports

For those using Sync Service Imports/Exports: Disabling the sync import will prevent any potential issues with student data importing into the wrong school year. While unlikely, caution is always encouraged.



**Sync Service**

Enable Sync Import for Year 2024

**Schedule Import: Students**

Enable the scheduling of automatic nightly imports for API and SFTP connections.

Time of Day  

Central Time

## Note:

We typically encourage your platform to be in the same school year as your SIS before re-enabling

# Running the Roll Over



# Step One: Roll Over

**Settings > Roll Over > Type "rollover"** (in all lower case)

You will **receive an email** once the roll over process is complete. **Refresh** your page to see the new school year.

## Failed Roll Over

A status of failed will show and allow the roll over to run again. The system will only run the portions that failed

**This process will copy all of your setup from the 2022-2023 school year to the 2023-2024 school year.**

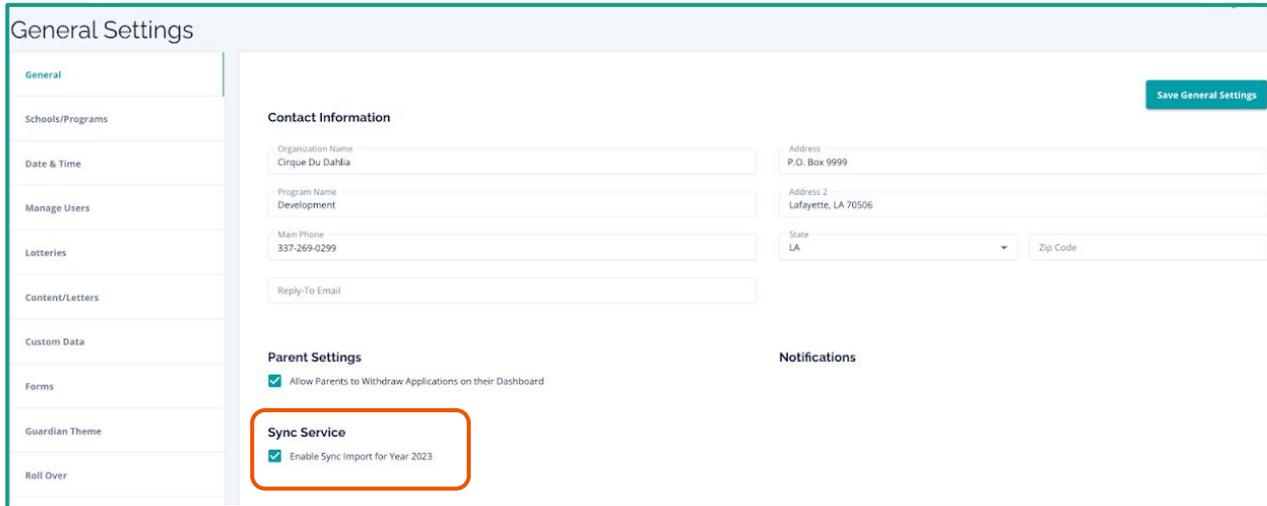
- Once the rollover is complete, any subsequent changes that you make to the setup of the **2022-2023** school year will not be reflected in the **2023-2024** school year.
- Student grade levels will be incremented by one grade level, unless "Retained" or "Skip a Grade" is selected.
- If you set your programs to roll over their waiting lists, those waiting lists and applications will carry over to the **2023-2024** school year.
- All of your data from the **2022-2023** school year will remain accessible through the school year drop-down menu at the top right of the page.
- Remember to double-check your default year in the "Date & Time" settings area after the rollover process is complete.

Type "rollover" to proceed with running the rollover process

**Start Roll Over**

# Step Two: Sync Service

Once roll over is complete, (and your SIS is also in the same school year), the settings in Enroll can be updated so that the SIS sync for the new year is enabled.



The screenshot displays the 'General Settings' interface. On the left is a sidebar menu with options: General, Schools/Programs, Date & Time, Manage Users, Lotteries, Content/Letters, Custom Data, Forms, Guardian Theme, and Roll Over. The main content area is titled 'General Settings' and includes a 'Save General Settings' button in the top right. It is divided into several sections: 'Contact Information' with fields for Organization Name (Cirque Du Dahlia), Address (P.O. Box 9999), Program Name (Development), Address 2 (Lafayette, LA 70506), Main Phone (337-269-0299), State (LA), Zip Code, and Reply-To Email; 'Parent Settings' with a checked checkbox for 'Allow Parents to Withdraw Applications on their Dashboard'; and 'Notifications'. The 'Sync Service' section, located at the bottom, contains a checked checkbox for 'Enable Sync Import for Year 2023', which is highlighted with an orange rectangular border.

# Step Three: Updating Default Year

When the time is right, typically after form/program/school updates and the SIS roll over process is complete, update the default year and adjust parent access.

**Note:** If you are syncing data from the SIS, you will need to turn on parent access for that year.

The screenshot displays the 'Date & Time' settings page in the SchoolMint application. The left sidebar contains navigation options: Date & Time, Manage Users, Manage Lotteries, Content/Letters, Custom Data, Forms, Workflow Notifications, Guardian Theme, and Roll Over. The main content area is divided into three sections: Application Dates, Registration Dates, and Timezone. Below these is the 'School Years' section, which contains a table with columns for Default, School Year, and Parent Access.

Default	School Year	Parent Access
<input checked="" type="radio"/>	2023-2024	<input checked="" type="checkbox"/>
<input type="radio"/>	2024-2025	<input type="checkbox"/>

# Step Four: Date & Time Settings

All date settings will automatically be incremented by one year. This will apply to application and registration open/close dates, grade birthdate ranges, and more.

## Manage Schools & Programs

- General
- Schools/Programs**
- Date & Time
- Manage Users
- Lotteries
- Content/Letters

### Open Enrollment: [Edit](#)

**Category Information**

Category Name \*  
Open Enrollment

Category Choice Limit  
2

Limit Per School  
1

**Application Dates**

Start Date  
11/01/2021 10:50 AM  
Mountain Time

End Date  
11/30/2024 05:25 AM  
Mountain Time

**Options**

Allow Applications to be Ranked

[Cancel](#) [Save Category](#)



# Step Five: New Year Prep

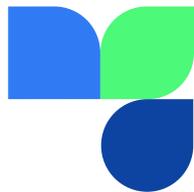
Perform the necessary yearly edits to programs, schools, form processes, etc. to prep for the new school year and launch to parents.

**Form Building 101**

**Application Readiness**

**Lottery Readiness**

**Registration Readiness**



# Step Six: Event Sessions

If your site is using scheduling, your events will roll over to the new year, but new sessions for all relevant events in the new year should be created.

## Scheduling

Cancel Save Event

Event Details

Session(s)

RSVP Settings

Assign to Programs/Schools

### Café Artist: Session(s)

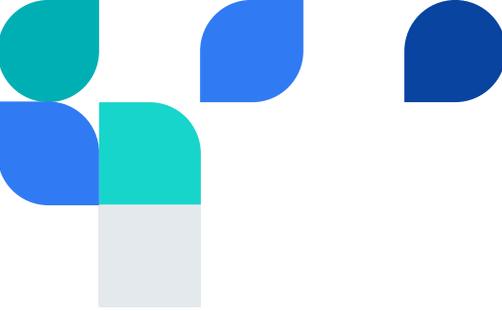
All Times Mountain Time

Import CSV  
Add Session

Start	End	Location & Details	Capacity	Actions
01:00 PM on 2021-12-01	02:00 PM on 2021-12-01		25	<span>✎</span> <span>🗑</span>

# Survey





# Q&A

**Q:** For grade increments, what happens with seniors/12th graders who don't graduate. Do we need to do something different or specific for the rollover?

**A:** By default, they will go to a grade with the value of 99.

**Q:** Can you re review the steps to download the form fields?

**A:** Yes! You will go to *Settings > Forms* and at the top right corner of your forms should be a button called *Form Field Download*. Click that button to download the files to your computer

**Q:** Can both school years import data at the same time? We have students enrolling during the current school year and then need to pre-register for the following school year. This is because we have open enrollment during the entire school year.

**A:** Yes, this is possible! We recommend reaching out to your CXM or [Technical Support](#) to get assistance in setting this up.



# Enroll 3.0

**We have some exciting new updates that you can use for your upcoming school year!**

- Common App
- Recruitment
- Autofill Fields
- Nested Filters
- Accessibility Updates



[\*\*Click Here to Learn More\*\*](#)



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**Thank you!**