



# SchoolMint Enroll

## Advanced Application Management



# Meet the Host



**Alexis Robin**  
**Sr. Customer Experience Manager**  
**Presenter**



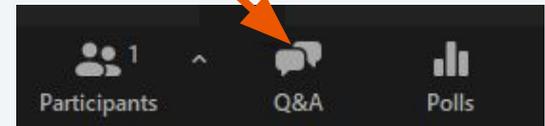
# Logistics



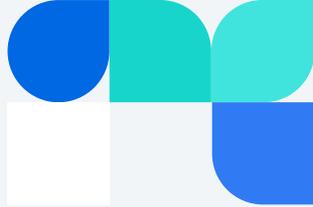
Slides, recording, and related resources will be shared in the follow up email tomorrow

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

- Admin Only Fields/Steps
- Creating Filters
- Using Saved Views
- Building Flags
- Troubleshooting



# Applications:

## Admin Only Steps & Fields



# What is Admin Only?

Sometimes, there is internal data admins may need to track as part of an application that is not visible to the guardian. Think of items like physical deliverables to be turned in, or data outside the system that needs to be tracked. In your Forms, you can make fields or whole steps be “Admin Only” to accomplish this.

## Admin Only: [Edit](#)

### Name

Step Name \*

Admin Only

### Settings

- Allow Changes After Submission
- Admin Only
- Allow Changes when Window Closed

## Restrictions ⓘ

- Admin Only
- Hide for SIS Students
- Hide for New Students
- Restrict to Selected Grades

## Application Form

1. Student Information
2. Guardian Information
3. Program Selection
4. Rank Choices
5. Siblings
6. Signatures
7. Admin Only
8. Review and Send

## Deliverables

- Birth Certificate
- SSN
- Proof of Income
- Drivers License

## Is this student on track to graduate?\*

- Yes
- No

# Applications

## Filters



# Quick Filters

The Applications Module has premade filters that you can use to find students meeting specific criteria.

## Student Applications

### Filter by Status

Show applications:

Submitted  Not Submitted

Eligible  Ineligible  In processing

**Submission Date Range:**

From  To

**Withdrawn:**

Withdrawn  Not Withdrawn

**Lotteries:**

Lottery List  Lottery Status

### Filter by Application Attribute

Form Process

School

Grade

Category

Program

Priority

### Filter by Student Attributes

Student Name

Flags

Clear All Filters   Apply Filters

# Create Your Own Filters

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

[Click Here:  
Learn More](#)

Apply Saved View  [Reset Filters](#) [Add Filters](#) [Save View](#)

Custom Fields

Complex Filtering

Missing Data

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  

[Add Condition](#) 

[Cancel](#)

[Apply Filters](#)

# Nested Filters

This allows you to layer multiple filters together to create more precise dynamic views.

### Add Filters

Match **ANY** **ALL** of the following conditions

Value Lookup application.status	Operator IS	Expected Value Eligible	✕
<b>AND</b>			
Value Lookup application.withdrawn	Operator IS	Expected Value Withdrawn	✕
<b>AND</b>			
Select Field lottery_rankings.lott...	Operator IS	Expected Value offered	✕
<b>AND</b>			
Match <b>ANY</b> <b>ALL</b> of the following conditions <span>🗑️</span>			
Select Field programs.categor...	Operator IS	Expected Value 2042	✕
<b>OR</b>			
Select Field programs.categor...	Operator IS	Expected Value 2296	✕

## Scenario:

We are wanting to reach out to guardians of students in specific grades based on the zip codes they live in. How can we use Nested Filters?

# Applications

## Dynamic Views



# Saved Views

Saved Views allow you to save filters and even choose which columns (up to 20) will show in your Application Module, and how you would like to sort the data. This makes it easy to pull a subset of students quickly. Saved Views are dynamic and will add new students to the view who meet the defined criteria automatically.

Student Applications: 2023-2024

Applications Settings

1

TOTAL STUDENTS

2

TOTAL APPLICATIONS

2

SUBMITTED APPLICATIONS

Search by Student Name or ID



Apply saved view

Standard View



Reset Filters

Add Filters

Save View

Apply Filters

Quick Filters

Save View: Add New

Cancel

Save View

#### General Information:

100% Grade In Processing

#### Access Settings

Private View (only accessible to you)

Globally Available to All Users

Quick Filters Applied: 648 quick filters on the application dashboard

Field	Operator	Value
Application	IS	Submitted
Application	IS	Not Withdrawn
Application	IS	In processing
Grade	IS	10

#### Filters Applied:



Add Filters

#### Sort Data By:

Search Field

Full Name (Full Name)

Ascending  Descending

#### Customize Columns:

Add Columns

Order	Column Label	Field	Actions
≡	App#	id	✎ ⌵
≡	Full Name	Full Name	✎ ⌵

Apply Saved View

Shared with me:

Birch ES Lottery View

Employee Child Priority

Flagged Students

Magnet Apps Recommendation Pending

Military Family

MS Open Enrollment Programs

OE Apps by Submitted Timestamp

Reg Not Started - Lottery Accepted

Standard View

Withdrawn Forms

# Applications

## Flags



# Flags

Flags are a great way to isolate applications 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 applications include IEP, 504, Expelled, Mckinney Vento, ELL, Income, and more!

Flags

System Flags

- Age Verification
- Duplicate Student Detected
- Non-Validated Address
- Possible Duplicate Student

Custom Flags

- IEP

	App#	Full Name
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	810630	Aardvark, Andrew

### Application Flags

**Aardvark, Andrew** Birthdate: 07/06/2008 Grade: 10 Guardian(s): 1235637: Alexis Lanier, 3976536: Courtney Bonin, 2365884: Walter Lopez

Program: Elm HS IB

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

# BYOF: Build Your Own Flag

Did you know that flags are retroactive? If you think of something you'd like to flag after applications are open, it's not too late! You can create a flag at any time, and it will update for students who meet that criteria.

Out of District - Lafayette: [Edit](#) Cancel Save Flag Type

**Flag Information**

Flag Type Name\*  
Out of District - Lafayette

Save Flag To Record\*  
Applications Saving to student annual will flag across all applications for a student

Flag Message:  
The student address is outside of the Lafayette District. Please review and mark as ineligible if applicant does not meet requirements.

Internal Description:  
This flag is looking for addresses outside of the Lafayette Test Boundary shapefile.

Show For  
 Applications  
 Registration

Trigger this flag if **ANY** of the conditions below are met

Student Address IS **OUTSIDE OF** Lafayette Test Boundary

Add New Trigger Add Nested Group

Cancel Save Flag Type

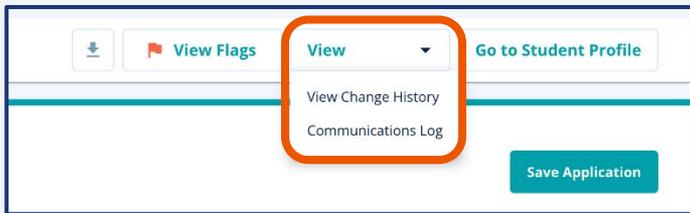
Click Here:  
Learn More

# Applications: Troubleshooting



# Change History & Communication Logs

In the individual applications are information about changes that happened on the students application, as well as communications sent regarding the form.



## Application Change History

**Aardvark, Andrew**

Birthdate:  
07/06/2008

Grade:  
10

Guardian(s)  
1235637: Alexis Lanier  
3976536: Courtney Bonin  
2365884: Walter Lopez

Search

After This Date

Before This Date

Apply Filters

Date & Time

User

Change Logs



08/29/2025 01:39:38 PM

Walter Lopez

1 Changes



07/29/2025 10:54:52 AM

Alexis Lanier

10 Changes

### (10) Change History

Field

Original Value

New Value

application.submitted

1

application.program\_id

12211

application.student\_id

5866778

## Student Communications Log

**Aardvark, Andrew**

Birthdate:  
07/06/2008

Grade:  
10

Guardian(s)  
1235637: Alexis Lanier  
3976536: Courtney Bonin  
2365884: Walter Lopez

Sent On

Sent To

Type

Automated

Subject

Status

12/9/2024  
3:09:00 PM

Jennifer  
Hurst

Email

Y

Parent Note Added by  
Administrator

Delivered

View

12/9/2024  
3:09:00 PM

Alexis  
Lanier

Email

Y

Parent Note Added by  
Administrator

Opened

View

# 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 🔍

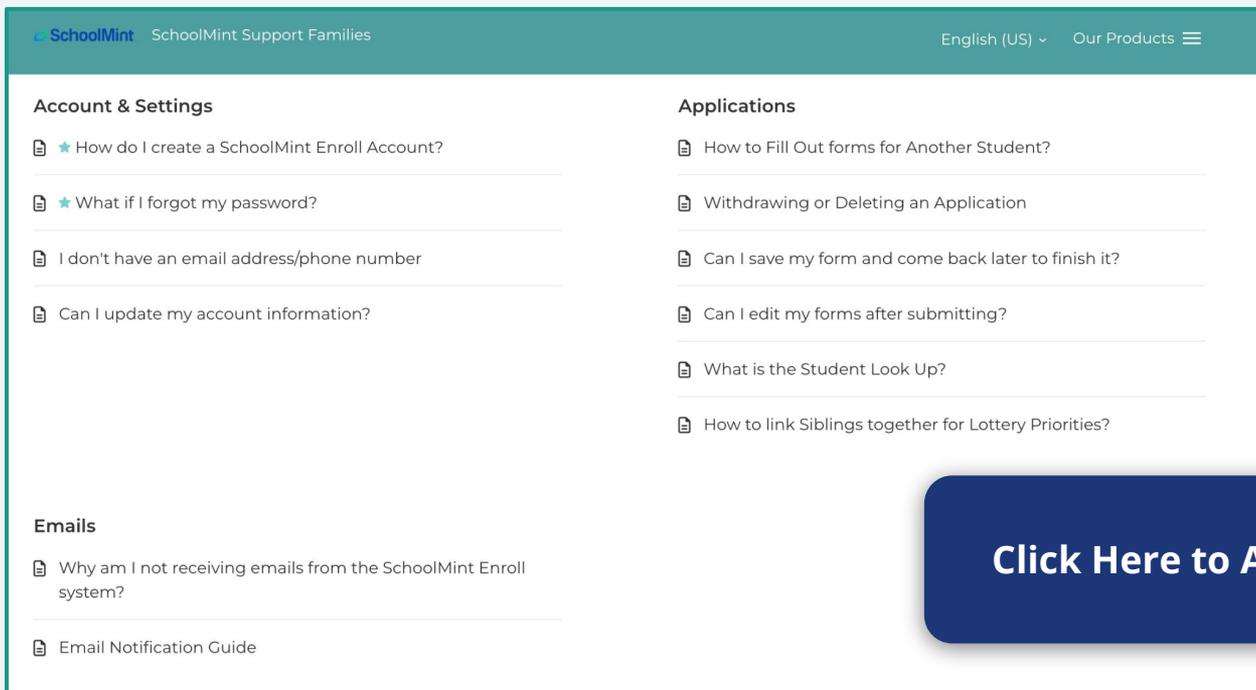
Search

0 / 18 Selected

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

# 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. The header includes the SchoolMint logo, the text "SchoolMint Support Families", and a language dropdown set to "English (US)". A navigation menu labeled "Our Products" is visible in the top right. The main content area is divided into three sections: "Account & Settings", "Applications", and "Emails". Each section contains a list of help articles, each with a document icon and a question 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](#)

**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!**

