

# All About Forms



SchoolMint<sup>®</sup>



# What are we reviewing in this webinar?

1

Basics of the form processes and their structure.

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**Form Basics**

2

The parts of the form process to customize further.

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**Steps & Fields**

3

How to show or hide steps based on certain criteria.

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**Restrictions**

4

How to show or hide fields based on conditions set.

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**Conditional Logic**

# This webinar is for Admins with Manage Forms access

- In order for a user to make changes to their form processes, they must be part of a user group that has the "Manage Forms" permission enabled.
- By default, all Super Admin user groups will have this setting enabled

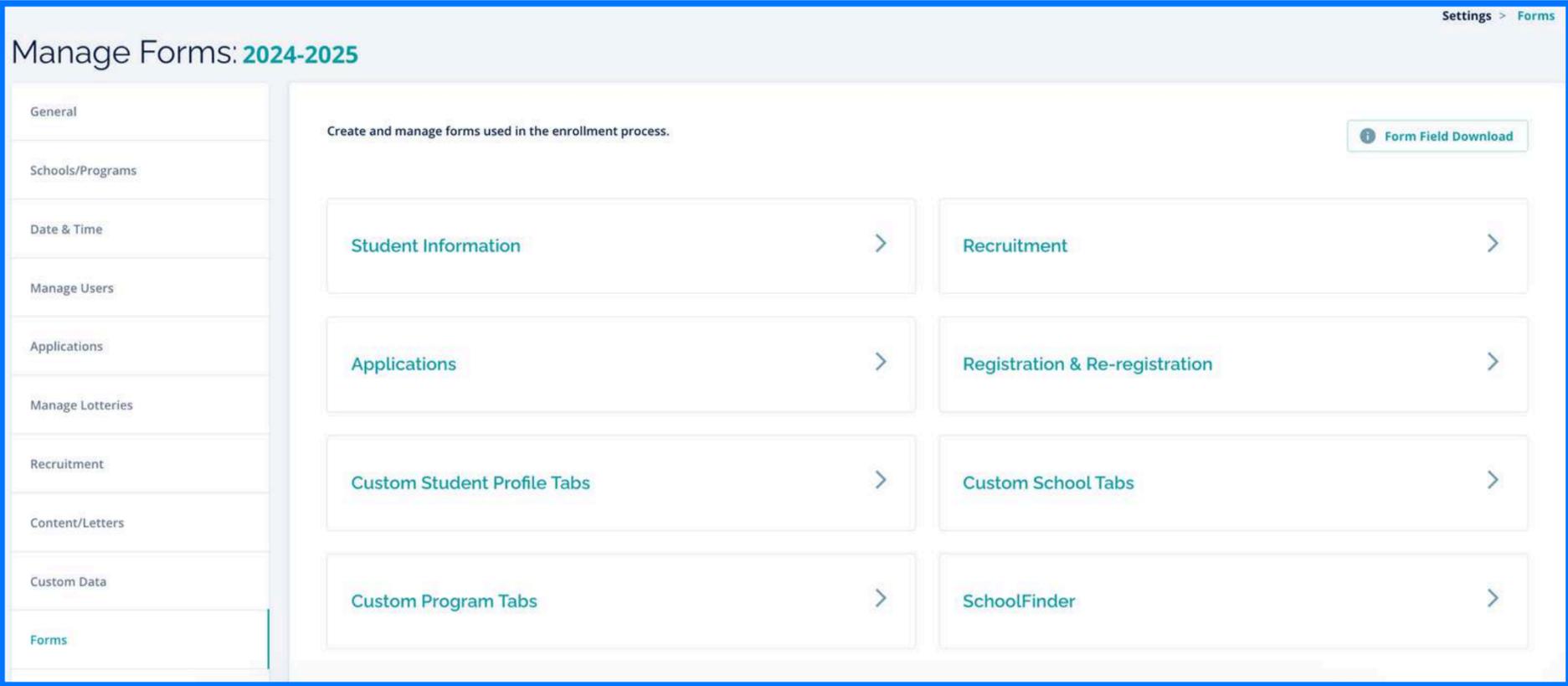
## Settings

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

Forms are one of the **most crucial parts** of the Enroll system. They are the driving force behind the **student placement process** and are the feature that **guardians directly interact with the most.**



# Let's Navigate to our Forms



The screenshot shows a web interface for managing forms. At the top right, there is a breadcrumb trail: "Settings > Forms". The main heading is "Manage Forms: 2024-2025". On the left is a vertical sidebar menu with the following items: General, Schools/Programs, Date & Time, Manage Users, Applications, Manage Lotteries, Recruitment, Content/Letters, Custom Data, and Forms (which is highlighted with a green underline). The main content area has a sub-heading "Create and manage forms used in the enrollment process." and a "Form Field Download" button. Below this are eight form categories, each in a box with a right-pointing arrow: Student Information, Recruitment, Applications, Registration & Re-registration, Custom Student Profile Tabs, Custom School Tabs, Custom Program Tabs, and SchoolFinder.

# Form Process Structure



SchoolMint<sup>®</sup>



# Types of Forms

Used to create or update a student account

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**Student Information**

Used to apply for lottery and can allow multi-choice

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**Applications**

Used to enroll in school and can allow export to SIS

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**Registrations & Re-Registrations**

Can be used for additional processes needed

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**Custom**

# How are Forms **Structured?**



## **Form Type**

The process that a guardian will be going through - ie the application, registration, appeals, etc.



## **Steps**

The individual sections within the form - ie Student Information, Guardian Information, Siblings, etc.



## **Fields**

The actual questions or items being gathered within the step - ie the student's name, guardian contact information, etc.



## **Values**

The responses the guardians are providing in each field - ie Tom, 555-555-5555, yes/no, etc.

# Parts of the Form

This screenshot shows the 'Product Learning Enablement' dashboard for user 'Caitlin Mayer' in the '2024-2025' school year. The dashboard features a navigation bar with 'Dashboard', 'Messages', 'English', and user profile options. A list of form types is displayed: 'Re-Register at Your Current School', 'Register to Your Neighborhood School', and 'Apply to More Schools'. An orange arrow labeled 'Form Type' points to the 'Apply to More Schools' option. Below this, two application cards are shown: 'Charter School Application' and 'School Choice Application', each with a 'Start' button. An orange arrow labeled 'Form Process' points to these application cards.

This screenshot shows the 'Charter School Application: 2024-2025' form. The form is divided into a 'Form Step' sidebar and a main 'Student Information' section. The sidebar lists six steps: 1. Student Information (checked), 2. Guardian Information (checked), 3. School Selection (warning), 4. Siblings, 5. Recommendations, and 6. Signatures. An orange arrow labeled 'Form Step' points to the first step. The 'Student Information' section includes fields for 'First Name' (Alexis), 'Middle Name', 'Last Name' (Robin), and 'Birthdate' (MM: 07, DD: 28, YYYY: 2014). A progress indicator shows '1/7'. An orange arrow labeled 'Form Fields' points to the input fields. At the bottom, there are 'Save & Exit' and 'Save & Continue >' buttons.

# Create a Form



# Creating a New Form



1 and manage forms used in the enrollment process.

Form Field Download

Student Information >

Applications >

Registration & Re-registration >

Custom Student Profile Tabs

2

Use this option if you want to build an entire form from scratch



# Duplicate an Existing Form



1 and manage forms used in the enrollment process.

Form Field Download

Student Information >

Applications >

Registration & Re-registration >

Custom Student Profile Tabs

2

Duplicate

Use this option if you want use an existing form process as a template

## Lottery Application

Form Process

Manage Steps

# Form Settings: Applications

**Lottery Application**  
Form Process

[Manage Steps](#)

### Lottery Application: [Edit](#)

[Cancel](#) [Save Process](#)

**Process Parameters**

Form Process Name\*  
Lottery Application

Maximum Program Choices\*  
Unlimited

Minimum Program Choices

Maximum Program Choices per School\*  
Unlimited

**Options**

- Allow Applications to be Ranked
- Separate Category Rankings
- Disable Application Ranking Changes After Submission
- Enable Student Lookup
- Student Lookup Required
- Enable Neighborhood School Banner
- Enable Appeals

Choose Appeal Form  
Request for Appeal

**Content Snippets & Translations**

EN

**Requirements and Policies:**

Paragraph **A** **B** *I* U [List icons] [Table icon] [Link icon] [Image icon] [Omega icon] [Video icon] [Text icon] [Eye icon] [Help icon]

# Form Settings: Registrations

Registration / Re-registration

Form Process

Manage Steps

Registration / Re-registration: [Edit](#) Cancel Save Process

Process Parameters

Form Process Name\*  
Registration / Re-registration

Options

- Enable Student Lookup
- Student Lookup Required
- Enable Neighborhood School Banner

Content Snippets & Translations

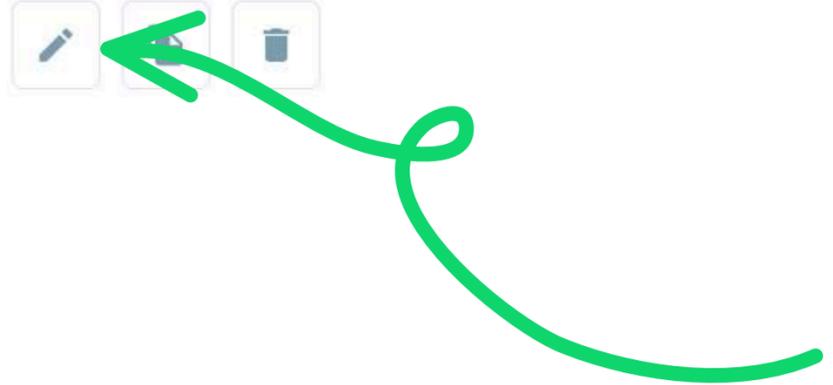
EN ES

Requirements and Policies:

Paragraph **A** **B** *I* U [List Icons] [Table Icon] [Link Icon] [Image Icon] [Omega Icon] [Video Icon] [Link Icon] [Eye Icon] [Help Icon]

P 0 WORDS

# Form Settings: Appeals



## Request for Appeal

Form Process

Manage Fields

### Request for Appeal: [Edit](#)

[Cancel](#) [Save Process](#)

**Form Parameters**

Form Name \*  
Request for Appeal

Set Number of Appeal Attempts for Guardians  
2

**Set Expiration**  
*Appeal expires at 11:59:59 PM on the day(s) chosen below*

Expiration Date for Appeal 1  
09/01/2024

Expiration Date for Appeal 2  
12/31/2024

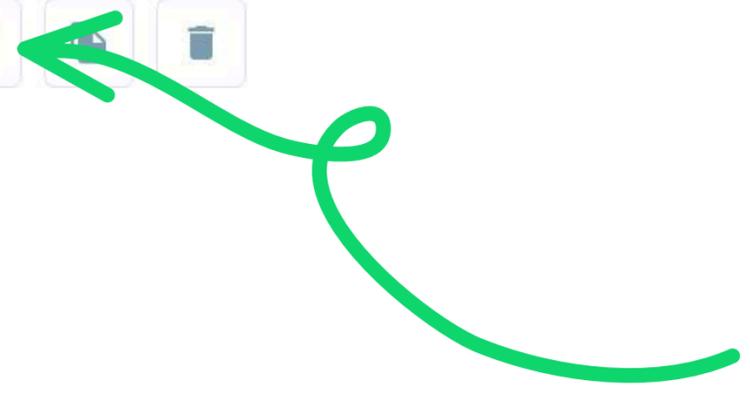
**Programs & Grades**

- All Programs
- All Grades

Show Appeal Option for the Selected Programs if:

- Application is marked as **INELIGIBLE** by an admin
- Application is marked as **WAITLISTED** by an admin
- Application is **AUTO-DECLINED** after an offer was not accepted or registration is not submitted by the set deadline

# Form Settings: Recommendations



## Recommendation Process

Recommendation Form

Manage Fields

### Recommendation Process: [Edit](#)

[Cancel](#) [Save Process](#)

**Process Parameters**

Form Process Name\*  
Recommendation Process

Deadline\*  
11/02/2024

Send Reminder (# of days before deadline)  
2

**Options**

Enable Decline Option

# Student Lookup



- Options
- Enable Student Lookup
  - Student Lookup Required
  - Enable Neighborhood School Banner

### Student Lookup

Thank you for your interest in the Oak School District. On this page you will find a few instructions to get you started with the application.

Is your student currently enrolled in CS Demo District and do you have your student ID?

Yes  No

Student ID \*

First Name \*

Last Name \*

Date of Birth

MM \* DD \* YYYY \*

# Neighborhood Banner



### Options

- Enable Student Lookup
- Enable Neighborhood School Banner

 This is your neighborhood school

1 Program(s) Selected 

### Charles Dickens Elementary

Address: 801 Mudd Ave, Lafayette

Distance: 4.79 mi [See Map](#)

Grades: K to 5

Select Program(s) to Apply:

#### Choice

- Charles Dickens Elementary

# Neighborhood Banner



### Options

- Enable Student Lookup
- Enable Neighborhood School Banner

Select Enrollment Type: 2021-2022

Please select the type of form you would like to submit for School Year 2021-2022

Register to a New School

This is your neighborhood school

**Grove Academy Charter School**

Address: 3939 West Congress Street, Lafayette

Grades: K to 12

Register

Apply to More Schools

A banner has been added to indicate which school/ program is the student's zoned school.





# Form Steps





**Each of the Steps have their own settings which can be edited by clicking the pencil icon**

- Reorganize Steps
- Duplicate Steps
- Add New Steps
- Delete Existing Steps

## Lottery Application

Form Process

Manage Steps

### Registration / Re-registration Steps

Manage Form Steps

[Back to Processes](#) [Add Form Steps](#)

1	= Student Information	<a href="#">Manage Fields</a>			
2	= Previous School Information	<a href="#">Manage Fields</a>			
3	= Guardian Information	<a href="#">Manage Fields</a>			

# Step Settings

**Student Information: Edit** Cancel Save Step

**Name**  
Step Name\*  
Student Information

**Settings**

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

**Advanced Restrictions**

Configure Advanced Restrictions

**User Group Restrictions**

Hide this step from user group(s):

Give view-only access to user group(s):

**Content Snippet & Translations**

EN

Paragraph **A** **B** *I* U [List] [Table] [Link] [Image] [Media] [Code] [Help]

## Registration

- Show for New Registrations
- Show for Re-Registrations

Registration Steps Only

# Advanced Restrictions



Show this step if **ANY** **ALL** of the conditions below are met

**Add Condition** **Add Nested Group**

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Programs

Date Range

Show this step if **ANY** **ALL** of the conditions below are met

Select Field	Operator	Expected Value
student_annual.guardian1_military	IS	Yes
<b>OR</b>		
Select Field	Operator	Expected Value
student_annual.guardian2_military	IS	Yes

**Add Condition** **Add Nested Group**



# Restrict Grades



Show this step if **ANY** **ALL** of the conditions below are met

**Add Condition** **Add Nested Group**

Simple Lookup

Field Comparison

Student Address

Grades

Student In Current School

Student Continues Feeder Path

Programs

Date Range

Show this step if **ANY** **ALL** of the conditions below are met

Select Field: student\_annual.grade Operator: IS

<input type="checkbox"/> Infant Toddler	<input type="checkbox"/> PreK3	<input type="checkbox"/> PreK	<input checked="" type="checkbox"/> K	<input type="checkbox"/>
<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/> 4	<input type="checkbox"/>
<input checked="" type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/>
<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/>

Select at least one grade

**Add Condition** **Add Nested Group**



# Restrict Programs



Show this step if **ANY** **ALL** of the conditions below are met

**Add Condition** **Add Nested Group**

- Simple Lookup
- Field Comparison
- Student Address
- Grades
- Student In Current School
- Student Continues Feeder Pat
- Programs
- Date Range

Show this step if **ANY** **ALL** of the conditions below are met

Select Field: application.program\_id

Operator: IS

Select One or More Programs: George Orwell High, Mark Twain High



# Form Fields



# Each of the Fields have their own settings which can be edited by clicking the pencil icon

- Reorganize Fields
- Duplicate Fields
- Add New Fields
- Delete Existing Fields



Order	Form Field Label	Type	Attributes	Actions
=	* <b>First Name</b> students.fname	Text	Required: Parent Disabled:	 Edit Duplicate Delete Insert New Form Field
=	<b>Middle Name</b> students.mname	Text	Required: Disabled:	
=	* <b>Last Name</b> students.lname	Text	Required: Parent Disabled:	

# Autofill Fields



With Autofill Fields, parents have to enter shared information only once. When they start a new application for another child, those details can automatically carry over.

Order	Form Field Label	Type	Attributes	Autofill Data	Actions
=	<b>Guardian Instructions</b>	Content Snippet	Required: Disabled:	<input type="checkbox"/>	⋮
=	* <b>Guardian 1 First Name</b> student_annual.guardian1_fname	Text	Required: Guardian / Admin Disabled:	<input checked="" type="checkbox"/>	⋮
=	* <b>Guardian 1 Last Name</b> student_annual.guardian1_lname	Text	Required: Guardian / Admin Disabled:	<input checked="" type="checkbox"/>	⋮

### Emergency Contacts

3/8

One or more fields below can be autofill with saved information. Fields can still be edited after autofill, please confirm.

**Yes, Autofill**

# Field Settings

### Student Information: Add Field

Cancel Save Field

**Field Parameters**

Field Type \*  
Text

Field Label \*

Required  Required Admin

Field Description/Note

**Data Settings**

Save To \*

Field Name \*

**Field Options**

Max Character Length

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**Advanced Options**

**Disable Options**

Disable After Submit  
 Disable for SIS Students  
 Disable Always (Read Only Current Value)  
 Disable After Value is Set

**Restrictions**

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

**Other**

Clear on Roll Over

# Conditional Logic



This determines when and why specific items show or don't show within a form process. It gives the ability to have fields within a form step hide or show based on answers to other questions in that step



# Form Translations



# Google Translate

If you're using Google Translate, you will not need to make any translations to your form!



# Custom Translations

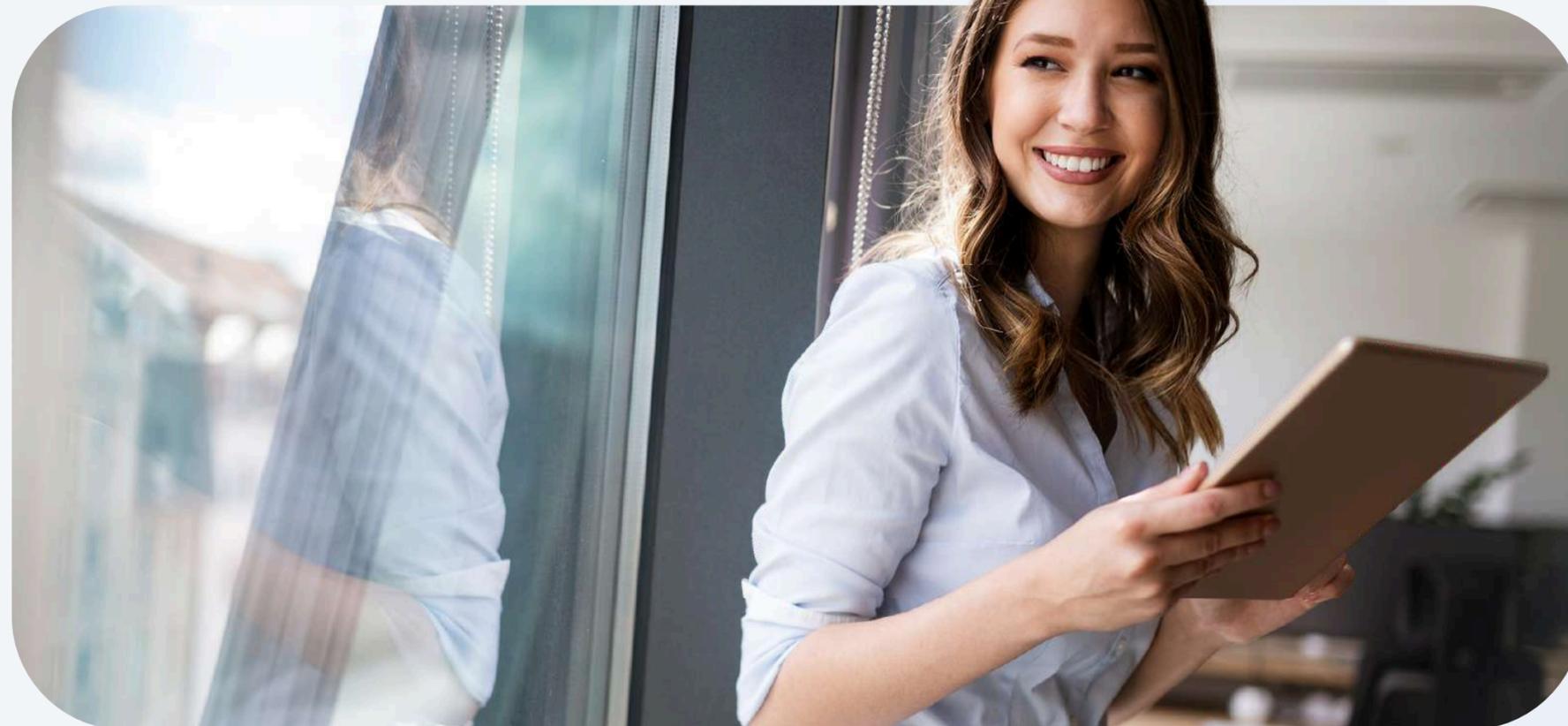


If your school is NOT using Google Translate, and instead utilizing Custom Translations, you will want to make sure that any new form steps or fields that you have added are translated.

The screenshot displays the SchoolMint interface for managing custom translations. On the left, a sidebar shows the 'Registration / Re-registration' form process with a 'Manage Steps' button. The main area is titled 'Translate: Registration / Re-registration' and includes a language selector set to 'ES' and 'Save Translations' and 'Cancel' buttons. The interface is divided into two columns: 'English' and 'Spanish'. Under 'English', the form step 'Registration / Re-registration' is listed. Below this, a section titled 'Choose a form step:' is expanded to show 'Student Information'. This section contains three rows of fields for translation: 'Form Step Name: Student Information', 'Student First Name', and 'Student Last Name'. Each field has a corresponding 'Spanish Translation' input box.

# Test, Don't Guess!

Testing is one of the most **IMPORTANT** steps in building your form process!



# Admin Resources



## Zendesk

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Help Articles  
Release Notes  
Webinar Calendar  
Submit Tickets



## Walk Me

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Step-by-Step guides  
within your Enroll  
platform. Access by  
clicking the  
**Need Help** button



## Community

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Enroll Forum  
Feature Requests  
Beta Groups and  
Surveys

# THANK YOU!



SCAN ME