

 **SchoolMint** Enroll

1.4 Amazing Features

RECOMMENDATIONS, AUTO DECLINE
APPLICATIONS, GOOGLE TRANSLATE & MORE

Feature Walk-Through / Product & Engineering
April 1, 2022





New Features

- Recommendations
- Google Translate Widget
- Admin Register for a Student
- Parent Notes (Registration)
- Auto Decline Applications
- Geocodes for Addresses
- Bulk Export Registrations
- Sync Service Mapping Index

Recommendations

Online recommendation request



Recommendations

- Complete a recommendation request as a guardian
- Complete a recommendation request for a student as a recommender user
- Review recommendations as an admin
- Create a custom recommendation forms and add to desired application

Recommendations - Guardian View

Guardians are able to request a recommender via the defined recommendation step by entering the recommender name, email and an optional message

Multiple recommendations can be assigned to a single step

1. Student Details

2. Guardian Information

3. School Choice

4. Rank Choices

5. East West Middle Recom...

6. Art Rec

English Rec

English Recommendation

Full Name *
Luis Smith

Recommender's Email *
luissmith@gmail.com

Message to Recommender
Please provide feedback for my student Henry L in your English 1 class.

+ Add Recommender

Math Rec

+ Add Recommender

Recommendations - Guardian View cont.

Henry C LeBlanc Submitted Forms

View status and take action on all submitted applications and enrollment forms for Henry C LeBlanc.

Henry C's Applications

Choice Application

East West - IB Program

Submitted & In Processing

Choice 1

East WestMiddle

Submitted & In Processing

Choice 2

Recommendations (1 of 4 Completed)

 Sent to test@aol.com	Pending
 Sent to elizabeth.briney@schoolmint.net	Completed
 Sent to elizabeth.briney@schoolmint.com	Pending
 Sent to elizabeth.briney+2@schoolmint.net	Declined

Recommendation requests are displayed in an accordion on the Student Profile. Guardians are able to view to whom the recommendation was sent, and check the status (completed, pending, past due, and declined.)

Recommendations - Recommender complete the form

Hello elizabeth,

Henry C LeBlanc has requested an online recommendation for their application with Poboy Academy.

Please complete the Recommendation form for the student at [link](#)

If you wish to decline this request, please confirm here [link](#)

If you are a SchoolMint Admin User in make sure you are logged out from SchoolMint to be able to see the recom

All recommendations must be completed by 04-30-2022.

The recommender will receive an email with a token which will allow them to access the online recommendation form.

The form is filled out and submitted by the recommender.

Recommendation for:

Student Information

Student Name	Henry C LeBlanc
Grade Applying	7
Current Grade	N/A
Current School	East West Middle

English Recommendation,

Does the student grasp grammar structure? *

☐ Yes

☐ No

☐ Other, Please Specify:

GPA for course

—/—

Enter GPA in the format X.XX

Date of coursework



Overall Recommendation: *

☐ Highly Recommend

☐ Recommend

☐ Recommend with Reservations

☐ Do not Recommend

Comments or Concerns:

500 characters remaining

Recommendations - Recommender decline option

Hello elizabeth,

Henry C LeBlanc has requested an online recommendation for their application with Poboy Academy.

Please complete the Recommendation form for the student at [link](#)

If you wish to decline this request, please confirm here [link](#)

If you are a SchoolMint Admin User in make sure you are logged out from

All recommendations must be completed by 04-30-2022.

**Recommendation forms
set with the decline
option will trigger an
email with the ability to
decline a request.**

The screenshot shows the 'Recommendation' form for Henry C LeBlanc. The modal 'Decline Recommendation Request' is open, asking for confirmation to decline the request. The form background shows student information and a section for 'English Recommendation' with radio buttons for 'Yes' and 'No'.

Student Information	
Student Name	Henry C LeBlanc
Grade Applying	7
Current Grade	N/A
Current School	East West Middle

Decline Recommendation Request

Please confirm you want to decline this recommendation request from Henry C LeBlanc?

No, Cancel **Yes, Decline Recommendation**

Recommendation Declined.

✓ Your recommendation has been declined for Henry C LeBlanc

Recommendations - Recommender status messages

Based on the status of the recommendation form the recommender will see the appropriate message

Thank You Elizabeth Briney!

✓ Your recommendation has been submitted for James Briney

**Submitted message -
recommender has
completed the form**

Recommendation Link has Expired



Unfortunately, the link to the recommendation form has expired. Links expire after a set date. If you have questions, please contact Poboy Academy.

**Expired message - form is
past due or was removed**

Recommendations - Application Management Screen Updates

25
TOTAL STUDENTS

Filter by Status

Show applications:

☒ Submitted

☐ Not Submitted

With Status:

☐ Eligible

☐ Ineligible

☐ In processing

Submission Date Range:

From

To

Withdrawn:

☐ Withdrawn

☒ Not Withdrawn

Lotteries:

Lottery List

Lottery Status

39
TOTAL APPLICATIONS

Filter by Application Attribute

Form Process

School

Grade

Category

Program

Priority

Recommendations

Pending

Complete

Declined

39
SUBMITTED APPLICATIONS

Filter by Student Attributes

Student Name

Flags

Clear All Filters

Apply Filters

Search by Student Name

Bulk Action

39 of 39 Records Loaded / Showing 39 entries / 0 Records Selected

App#	Full Name	Rank	Category	Program	Grade	Sib	Priority	Recommendations	Date	Actions
2928791	Allyson Jimenez	0	Choice Schools	Puppy School	5		4	8 Completed	2021-11-15	
		0	Choice Schools	Test	1		4	9 of 13 Completed	2022-02-17	
		1	Choice Schools	Puppy School	1		4	9 of 13 Completed	2022-02-17	
		0	Choice Schools					14 of 16 Completed	2022-03-14	
		0	Neighborhood Schools					14 of 16 Completed	2022-03-14	

Search by Student Name

Bulk Action

39 of 39 Records Loaded / Showing 39 entries

	App#	Full Name
☒	2928791	Allyson Jimenez
☒	3394313	Aurie Arecco
☒	460813	Aurie Arecco

Send Email/Text Message

Update Application Status

Print/Download Forms/ Deliverables

Resend Recommendation Requests

Filter and view
recommendations based
on status

Bulk email recommenders
with a pending
recommendation

Recommendations - Admin

Manage Recommendations

 **G1 test**

Birthdate:
01/02/2020

Grade:
3

Guardian(s)
1001520: Genaro Guerrero

Bulk Action ▾

Add new Recommendation Form

☐	Form	Recommender	Requested	Completed	Recommended	Status	Actions
☐	Art Recommendation	Gtool	03/09/2022 11:14 PM		N/A	Declined	 Resend
☐	Art Recommendation	Claire	03/11/2022 06:25 PM		N/A	Pending	 Resend
☐	Art Recommendation	naro	03/09/2022 05:13 PM	03/09/2022 05:13 PM	Highly	Complete	 Resend
☐	Art Recommendation	one more	03/11/2022 06:25 PM		N/A	Pending	 Resend
			03/10/2022 03:51 PM	03/10/2022 03:51 PM	N/A	Complete	 Resend
			03/10/2022 03:52 PM	03/10/2022 03:52 PM	N/A	Complete	 Resend
			03/10/2022 04:03 PM	03/10/2022 04:03 PM	Highly		
			03/10/2022 04:06 PM	03/10/2022 04:06 PM	Yes		

Admins are able to manage recommendation form in the recommendation table view. View status, if the student was recommended, view completed forms, complete a recommendation, and resend emails

Bulk Action ▾

Resend Recommendations

Recommendations - Admin Add Recommendation

Manage Recommendations

 Bob Ross	Birthdate: 07/21/2015	Grade: 11	Guardian(s) 976740: Elizabeth Briney 1001520: Genaro Guerrero 1001603: Parent Account 1002929: Adrian Rojas 996942: Gattling Script User 1001653: Schoolmint Sso
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Bulk Action ▼

Add new Recommendation Form

The admin has the ability to add recommendations from the recommendation table

Please select the type of recommendation form you would like to add:

Select Recommendation Form *

Math Recommendation

The admin can select the recommendation form they wish to complete

The form will display and the admin can complete

Math Recommendation

 Bob Ross	Birthdate: 07/21/2015	Grade: 11	Guardian(s) 976740: Elizabeth Briney 1001520: Genaro Guerrero 1001603: Parent Account 1002929: Adrian Rojas 996942: Gattling Script User 1001653: Schoolmint Sso
---	---------------------------------	---------------------	---

Bob Ross 2020-2021 School: Westbrook Leadership Academy

Recommender's Information:

Recommender Name *

Recommender Email

Math Recommendation:

Do you recommend this student

☐ Yes

Cancel

Submit

Recommendations - Create Forms

Manage Forms

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Update forms for applications, registration, and recommendations.

Student Information

Applications

Registration & Re-registration

Custom Student Profile Tabs

Recommendations

Recommendation Forms

Back

English Recommendation

Recommendation Form

Manage Fields

Math Recommendation

Recommendation Form

Manage Fields

Counselor Recommendation

Recommendation Form

Manage Fields

Art Recommendation

Recommendation Form

Manage Fields

Generic Recommendation

Recommendation Form

Manage Fields

Early College Recommendation

Recommendation Form

Manage Fields

**New form type for
recommendations has
been added in Forms.**

**Build custom
recommendation forms
as needed**

Recommendations - Create Forms cont.

+
Add a Recommendation Form

Start a new
recommendation
form

1. Name form (required field)
2. Add a deadline for completion (required field)
3. Set a reminder email (optional field)
4. Enable the option to allow a recommender to decline the request. (optional field)

Recommendation Form: [Add New](#)

Process Parameters

Form Process Name*
French Recommendation

1

Deadline*
04/30/2022

2

Send Reminder (# of days before deadline)

2

3

Options

☐ Enable Decline Option

4

Cancel

Save Process

Recommendations - Create Forms cont.

Art Recommendation: Add Field Cancel Save Field

Field Parameters

Field Type*
File Upload

Field Label*
Upload an example files of student work

☐ Required

Field Description/Note

Upload Options

Restrict File Types to
jpeg png pdf mp3

☒ Allow Multiple Files

Select One or More File Types

Data Settings

Save To*
Recommendation

Field Name*
Custom

Custom Field Extension*
art_upload
(only alphanumeric characters, starting with a letter, and no spaces)

Overall Recommendation: Edit Cancel Save Field

Field Parameters

Field Type*
Overall Recommendation

Admins have the ability to configure each recommendation form by adding the necessary fields for their org.

New form field added for Overall Recommendation.

Field allows the recommender to give the final overall recommendation for the student.

Recommendations - Add to a Form

English Recommendation: [Edit](#)

[Cancel](#) [Save Step](#)

Name

Step Name *

English Recommendation

Settings

☒ Allow Changes After Submission

☐ Admin Only

☒ Allow Changes when Window Closed

Advanced Restrictions

☒ Configure Advanced Restrictions

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

Select Field: **program_id** Operator: **IS** Select One or More Programs: **East West Middle**

[Add Condition](#) [Add Nested Group](#)

Add the recommendation to the step using the recommendations field type and select the recommendation form you wish to assign for the step.

Create a recommendation step and apply advanced restrictions as needed.

Recommendations: [Edit](#)

[Cancel](#) [Save Field](#)

Field Parameters

Field Type *

Recommendations

Select Recommendation Form *

English Recommendation

English Recommendation
Math Recommendation
Counselor Recommendation
Art Recommendation
Generic Recommendation
Early College Recommendation
Test

Disable Options

☐ Disable After Submit

☐ Disable for SS Students

☐ Disable Always (Read Only Current Value)

☐ Disable After Value is Set

Restrictions

☐ Admin Only

☐ Hide for SS Students

☐ Hide for New Students

☐ Restrict to Selected Grades

Recommendations - Min/Max limits

- When a minimum limit is set the guardian will be required to enter the set number of recommendations in order to move past that step.
- When a maximum limit is set the guardian will not be allowed to submit requests over the set number for that field.

Settings > Forms > Applications > Choice Application > Art Rec > Recommendations

Recommendations: Edit

Cancel Save Field

Field Parameters ⓘ

Field Type*
Recommendations

Select Recommendation Form*
Art Recommendation

Recommendation Options

Minimum Required Recommendations
1

Maximum Required Recommendations
2

Recommendation forms can be set with minimum and maximum limits when the form is added to the application.

How do I set up this feature?

Contact your Onboarding Specialist or Support to enable this feature at no additional charge.

Troubleshooting Tips / Known Issues

- Email content names:
 - Recommender Notification
 - Recommender Notification - Decline Enabled
 - Recommendation Reminder (coming in 1.4.1)
 - Recommendation Reminder - Decline (coming to 1.4.1)
- Recommender who is also an admin user will need to sign out in order to complete a recommendation form
- The recommendation emails sent to the recommender are only in English - we will not know the language of the recommender therefore we do not offer a translation of the email.
- Past Due recommendations are not displaying the past due status properly - this is currently being evaluated and corrected in an upcoming release.



Google Translate Widget

Surfaced the Google Translate browser option



Google Translate - Enabling

Internal Settings

Save Internal Settings

Modules

☒  Enable Application Module

☒  Enable Enrollment Module

☒  Enable Lottery Module

☒  Enable Recommendations

☒  Enable Scheduling

☒  Enable Sync Service

Languages

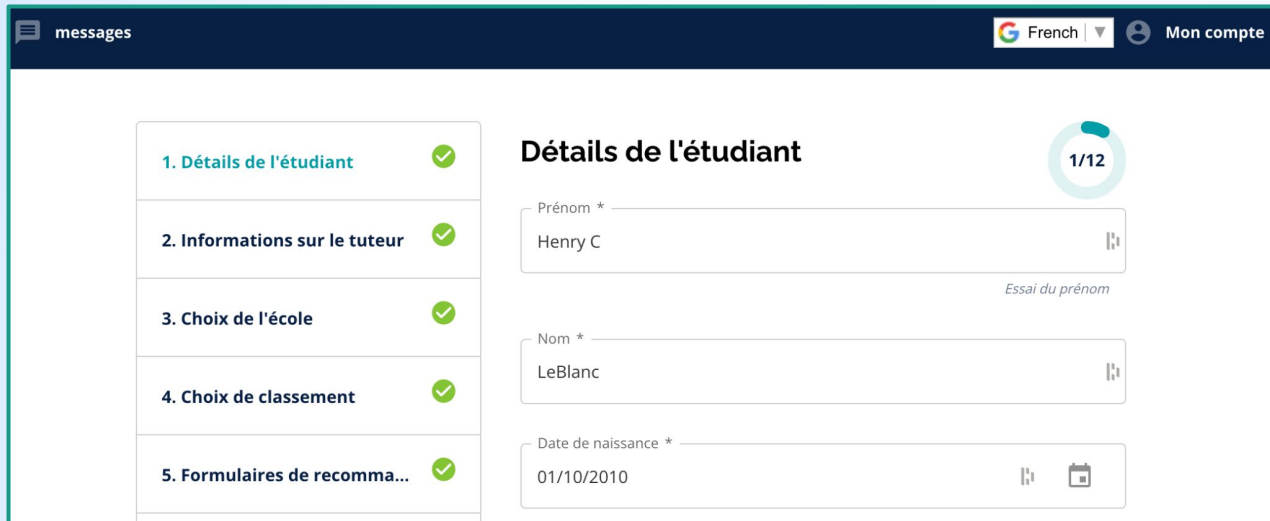
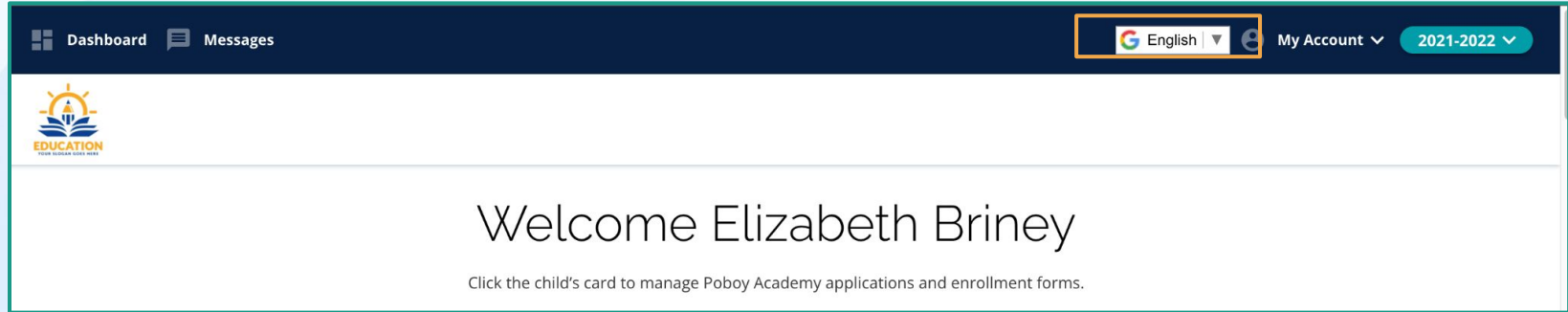
 Languages
English 

☐  Enable Full Translation Support

Enable the Google Translate feature by disabling the Enable Full Translation Support checkbox.

Remove any languages other than English from the language picker

Google Translate - Guardian View



**Google Translate widget
will be present on the
guardian view when
enabled.**

**The widget will translate
the text on the page via
the Google API.**

Google Translate - Admin View

Form Processes

Applications Form

Translate









Enhanced Translation

Form Process

[Manage Steps](#)

Form Processes

Applications Form







Google Translate

Form Process

[Manage Steps](#)

Language & Translations

Enhanced Translation

EN ES AR

Language & Translations

Google Translate

EN

When using the Google Translate option the translation icon will no longer appear for admins

By removing languages other than English the tabs for other languages will be hidden.

How do I set up this feature?

Contact your Onboarding Specialist or Support to discuss switching from the default Enhanced Translation feature to Google Translate at no additional charge. However, the Enhanced Translation features will no longer be available if you choose to use Google Translate.

Troubleshooting Tips / Known Issues

- I still see language tabs as an admin:
 - Ensure that you have removed all languages other than English from the language picker in Internal
- Google Translate is limited based on the translations provided by Google. We are not able to modify translations when using this feature. For a more robust translation option use Enhanced Translations.
- The events page will not work properly using Google Translate - this is corrected in 1.4.1.



Admin Register for a Student

Admin ability to complete a registration for a student



Admin Register for a Student - Student Profile

Student: Alina McHenry

Profile Applications **Registration** Notes

Student Registration
There is no registration for Alina McHenry in 2021-2022.
Click on "+ Add Registration" button to start a registration for this student.

+ Add Registration for Alina McHenry

Save Student

Admins can add a registration for the student from the registration tab found in the student profile.

Completed registrations can be found here as well

Student: Alina McHenry

Profile Applications **Registration** Notes Test

Student Registration

ABBA Academy
Submitted & In Processing

+ Registration

Admin Register for a Student - Select a School

Add Registrations

[Back to Students](#)

 **Alina McHenry**

Birthdate:
05/30/2020

Grade:
4

Guardian(s)
No associated guardian accounts

Please select the type of form you would like to submit

^ Register to Poboy Academy

3 Option(s)

ABBA Academy	90011, Los Angeles	Grades: K to 5	Register
Pup School	4309 JOHNSTON ST, Opelousas	Grades: K to 5	Register
T.M. Elementary	90011, Los Angeles	Grades: K to 5	Register

Admins can choose the school to which they wish to register the student into

Admin Register for a Student

Start Registration

Back to School Options

Alina McHenry

Birthdate:
05/30/2020

Grade:
4

Guardian(s)
No associated guardian accounts

Fill in Registration Form: ABBA Academy

1. Student Details

2. Guardian Details

3. Elementary Reg Questions

4. Home Language Survey

5. Show me for Re-reg

6. Show Me for New Reg

First Name
Alina

Last Name
McHenry

Birth Date *
05/30/2020

Grade
4

Selecting an address from the list is required for location services.

The admin will then move through the form process and has the ability to submit the registration

Start Registration

Back to School Options

Alina McHenry

Birthdate:
05/30/2020

Grade:
4

Guardian(s)
No associated guardian accounts

Fill in Registration Form: ABBA Academy

1. Student Details

2. Guardian Details

3. Elementary Reg Questions

4. Home Language Survey

5. Show Me for New Reg

6. Signature

Home Address
1000 West Pinhook Road

Confirmation

Alina McHenry

Birthdate:
05/30/2020

Grade:
4

Guardian(s)
No associated guardian accounts

Registration Submitted for:

ABBA Academy

Submitted & In Processing

Go to Student Profile

Troubleshooting Tips / Known Issues

- At this time the option to add a registration from the guardian profile is not present. This will be considered for a future release.
- The ability to complete an override will be considered for a future release.

Parent Notes (Registration)

Add notes to parents for registration



Parent Notes (Registration)

- Ability to add notes to a registration.
- Similar to parent notes for applications released in 1.3.2

Parent Notes (Registration)

Note Options:

- Only this registration: note will only apply to the registration you are adding the note to
- All registrations for this student: note will apply to all registration records for the student.
- All registrations for all students of the same guardian: note will apply to all registration records for all students belonging to that guardian.

The screenshot shows a 'Notes' form with a close button (X) in the top right corner. At the top right is a 'Manage Note Types' button. Below this is a 'Display to Guardian(s)' section with a toggle switch set to 'OFF' and the text 'OFF: Internal note not shown on Guardian(s) Dashboard'. Underneath is the 'Add Internal Note' section, which includes a dropdown menu currently showing 'Only this registration'. The dropdown menu is open, showing three options: 'Only this registration', 'All registrations for this student', and 'All registrations for all students of the same guardians'. To the right of the dropdown is a 'Note Type *' dropdown menu. Below these is a large text area for the note, with a '500 characters remaining' indicator at the bottom right. At the bottom of the form are 'Close' and 'Save Note' buttons.

Notes

Manage Note Types

Display to Guardian(s)

OFF: Internal note not shown on Guardian(s) Dashboard

Add Internal Note

Only this registration

All registrations for this student

All registrations for all students of the same guardians

Note Type *

Note:

500 characters remaining

Close Save Note

Parent Notes (Registration)

Notes

Manage Note Types

Display to Guardian(s)
☒ ON: Display Note on Guardian(s) Dashboard

Add Guardian Note
Saves Note To ^{*}
All registrations for this student
Note Type ^{*}
Phone Call

On March 16, 2022
Note: ^{*}
Need to gather proof of residency
466 characters remaining

Close Save Note

The admin has the ability to share any notes add with the guardian.

Please Confirm

Are you sure you want to make this note visible to Guardian(s)?
Note will display on the guardian dashboard with the selected student records

Cancel Yes, share note with guardian(s)

Parent Notes (Registration)

Accordions's Registrations

East West Middle

Submitted & In Processing

Withdraw



Guardians can view the notes added from the student profile

Notes for Accordions Testing

Date	Category	Note
03/16/2022 05:04:43 PM	Registrations	Need to gather proof of residency Note for: all student's registrations

Close

Troubleshooting Tips / Known Issues

- Parent notes will not send out an email/ text notification. This is currently being evaluated as a future enhancement.



Auto-Dencline Applications

Automatically Dencline Offers If Not Accepted in Timely Manner

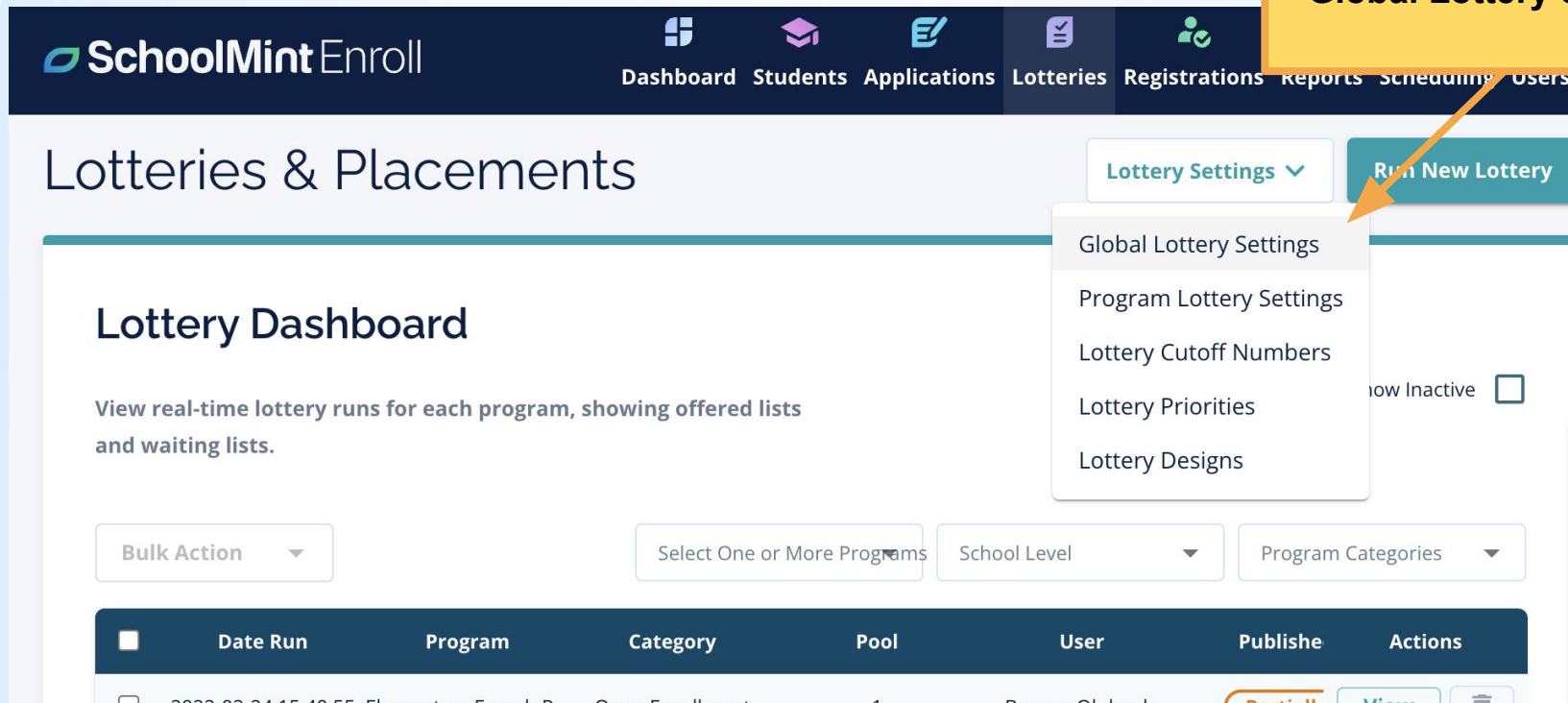


Auto-Dcline

Automatically decline offers that are not accepted in a timely manner. Also optimized notifications for consistent behavior when sending offers or declines.

Auto-Dcline - Setup

Go to Global Lottery Settings



The screenshot displays the SchoolMint Enroll web application. The top navigation bar includes links for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main heading is "Lotteries & Placements". Below this, the "Lottery Dashboard" section provides a description: "View real-time lottery runs for each program, showing offered lists and waiting lists." To the right of the dashboard, there is a "Lottery Settings" dropdown menu and a "Run New Lottery" button. An orange callout box labeled "Global Lottery Settings" points to the "Global Lottery Settings" option in the dropdown menu. The dropdown menu also lists "Program Lottery Settings", "Lottery Cutoff Numbers", "Lottery Priorities", and "Lottery Designs". Below the dashboard, there are filters for "Bulk Action", "Select One or More Programs", "School Level", and "Program Categories". At the bottom, a table with columns for Date Run, Program, Category, Pool, User, Published, and Actions is partially visible.

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Lotteries & Placements

Lottery Dashboard

View real-time lottery runs for each program, showing offered lists and waiting lists.

Lottery Settings ▼ **Run New Lottery**

- Global Lottery Settings
- Program Lottery Settings
- Lottery Cutoff Numbers
- Lottery Priorities
- Lottery Designs

Bulk Action ▼ **Select One or More Programs** **School Level** ▼ **Program Categories** ▼

	Date Run	Program	Category	Pool	User	Published	Actions
☐	2023-03-24 15:40:55	Elementary French B	Open Enrollment	1	Bryan Okunaka	Partially	View Edit

Auto-Dcline - Setup

- Main Checkbox to turn on the feature
- Days Setting (optional)
 - Normal Calendar days from date of offer
- Date Setting (Required)
 - No auto-roll-ups will occur after this date
 - If number of days goes beyond Date Setting, then Date Setting wins
- Time of day Auto-Dclines process. (Org Time Zone)

Settings

Accept/Decline Placement



Allow parents to accept/decline seats from dashboard



Auto-decline student's other applications on **OFFERED LIST** upon accepting seat into another choice



Auto-decline **APPLICATIONS** on offered list **IF OFFER** is not accepted by:

Days From Published

5

or/and

On This Date

03/22/2022



If the number of days from published goes past the On Date setting, then the auto-decline happens on earliest date.

Auto-Dcline Time

05:00 PM



Time of day auto-decline starts on the set day/date.

Auto-Delay - Setup

Email Template: Offered

Auto-Delay Expiration Date

Example Output:

"Accept your placement by 5:00 PM CT on May 23,
2022 to avoid being automatically declined."

Settings > Content Letters > Email Text Templates > [Edit](#)

Content/Letters

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Sync Service

Boundaries

Internal

Migration Import

Imports

Lottery Results - Offered: [Edit](#)

Cancel

Save Template

General Information

Content Name *
Lottery Results - Offered

Type
Lottery

Description
Notification sent if student is placed on the offered list

Information

☒ All Schools/Programs

Language & Translations

EN

ES

Enter in a Text Message *
Congratulations! {\$student->fname} {\$student->lname} has been offered admission to

7 characters remaining in your text message

Enter Email Subject Line *
{\$student->fname} {\$student->lname} Offer of Admission

↶ ↷ Paragraph A B I U

The lottery for {\$Application->program->title} has been run.

Congratulations! {\$student->fname} {\$student->lname} has been offered admission!

Accept your placement by {\$auto_decline_date} to avoid being automatically declined.

Parent UI

Katherine's Applications

+ Applications

Choice Application

Martin Luther King Jr. Elementary School

Offered

Expires on: 02/16/2022 12:00 PM

Choice 1

Withdraw

Decline

Accept

Auto-Dcline - How It Works

Admin UI

Rank	ID#	Student Name	Expiration Date	Status	Sub-Lottery	Weight	Priority	Actions
1	SC87783	Carolyn Perkins	02/16/2022 12:00 PM	✓	1	1	4	Placement
2	SC97452	↑↓ Margaret Rice	02/16/2022 12:00 PM		2	1	4	Placement
	SC87783	Susan Douglas	01/16/2022 12:00 PM					

Auto-decline APPLICATIONS on OFFERED LIST if offer is not accepted by:

Lottery Status

Ranking

#2 on Offered List

Offer Expiration Date:

02/16/2022 12:00 PM

[Placement History](#)

Status

☐ Accepted

☐ Declined

☒ Pending

Date hides if Accepted

Existing Published Offer Methods Will Set the Expiration Date

- Publish Lottery
- Running Lottery After It has Been Published
- Manual Placement/Lottery Status
- Auto-Rollup
- Bulk Offer

Prevention - Prevent New Offers After Auto-Decline Date

We want to avoid sending offers to parents that will auto-decline without time for them to accept.

- Helper Text displays when clicking on disabled buttons

- Run Lottery
- Publish
- Manual Offer/Pending
- Warning Banner
- Lottery Status
- Bulk Offer Option Hides

Auto-Dcline - Prevent New Offers After Auto-Dcline Date

Run Lottery

Can't Run Or Publish Lottery
after Auto-Dcline Date Setting

Lotteries & Placements

Lottery Settings ▾

Run New Lottery

Lottery Dashboard

View real-time lottery runs for each program, showing offered lists and waiting lists.

Show Inactive ☐

Bulk Action ▾

Select One or More Programs ▾

School Level ▾

Program Categories ▾

☐	Date Run	Program	Category	Pool	User	Published	Actions
☐	2021-06-30 08:50:25	School of the Epiphany	Open Enrollment	1	Pablo Montano	No	View
☐	2021-04-30 20:05:29	Paul Revere - STEM	Special Applications	4	Busayo Olukunle	No	View
☐	2021-04-23 19:29:22	Rooftop Elementary	Special Applications	1	Sean Finerty	—	View
☐	2021-04-23 19:29:22	Paul Revere - Chinese Immersion	Special Applications	1	Sean Finerty	—	View

Auto-Dcline - Prevent New Offers After Auto-Dcline Date

Manual Offer / Pending

Setting a Pending Status is Disabled

ID#	Student Name	Status	Sub-Lottery	Weight	Pri
Adjust Application Placement qa_fn_1347142577 qa_ln_1347142577 Birthdate: 01/01/2015 Grade: 1 Guardian(s) 125: Busayo Olukunle 123: Harry Potter Current Position Offered ☒ Move qa_fn_1347142577 on to the offered list ☐ Move qa_fn_1347142577 to on the waiting list Notes / Reason * Update Placement Status Accepted Declined Pending - Disabled because of auto-decline Cancel Save Placement					

Auto-Decline - Prevent New Offers After Auto-Decline Date

Warning Banner

! Pending status is not available after Auto-Decline date. Adjust Lottery Settings as needed. X

Lotteries & Placements

[Lottery Dashboard](#)[View Settings](#)[Export Lists](#)

School of the Epiphany

View lottery runs, adjust placements, manage waiting and view placement history.

Lottery Run Published ✓

**Warning Banners Display in
some scenarios.**

Auto-Dcline - Prevent New Offers After Auto-Dcline Date

Lottery Status

Open Enrollment Application : [Edit](#)



Withdraw

View

Go to Student Profile



qa_fn_qa_ln_

Save Application

Records 1

Guardian(s) [Add/Manage](#)

123: Harry Potter

Setting a Pending Status is Disabled

#1 on Offered List

Application Status

Submission

☒ Submitted

☐ Not Submitted

Eligibility

☒ Eligible

☐ Ineligible

☐ In Processing

Submitted On

05/04/2021 06:14 PM



Pacific Time

Lottery Status

Ranking

#1 on Offered List

Offer Expiration Date:

03/11/2022 04:00 PM

Status

☐ Accepted

☐ Declined

☒ Pending

Placement History

Troubleshooting

- Importing apps with a Pending Status Does Not Set Expiration
- Offers on last day of Date setting could end up being a short window of time for parents to respond.
- Expiration is set at the time of the offer. (Datetime in local timezone.)
- Expiration value is cleared when offer is accepted in time.
- Expiration value is retained if declined (Shows in Red in UI.)
- Does not yet include Auto-Delay for Registrations not submitted in a timely manner
- If Auto-Delay is turned off, then the expiration dates are ignored. If it is turned back on, it will process ones it missed while it was off.
- If the number of days, date, and time settings are changed, it does not affect past offers. This is by design so that it can support running multiple lottery phases.
- Process checks every hour when setting is turned on to look for expired Offers.

Known Issues

- Because Email Template has number of days, that could be incorrect when it overlaps auto-dedline Date Setting.

Geocodes for Addresses

Nightly job to get latitude/longitude if missing for a student



Geocodes for Addresses

- Geocode is the latitude/longitude for a student or school address in Enroll
- Used for location/proximity features
- When an address is missing the geocode lat/long, those features won't work
- Need to populate missing geocodes when we can



Geocodes for Addresses

- The service is triggered when an address is entered or updated on a page
- There are currently some situations where that doesn't happen
- We created a nightly job to help with missing student address geocodes

When could a student's geocode lat/long be missing?

- The student's address may not be recognized by HERE/Google:
 - The parent or admin did not select an address from the list of suggested addresses
 - The parent or admin entered the address in a different format than what HERE/Google recognizes (must be exact)
 - New addresses may not be in HERE/Google's mapping system yet (may take several months in some cases)

Geocodes for Addresses

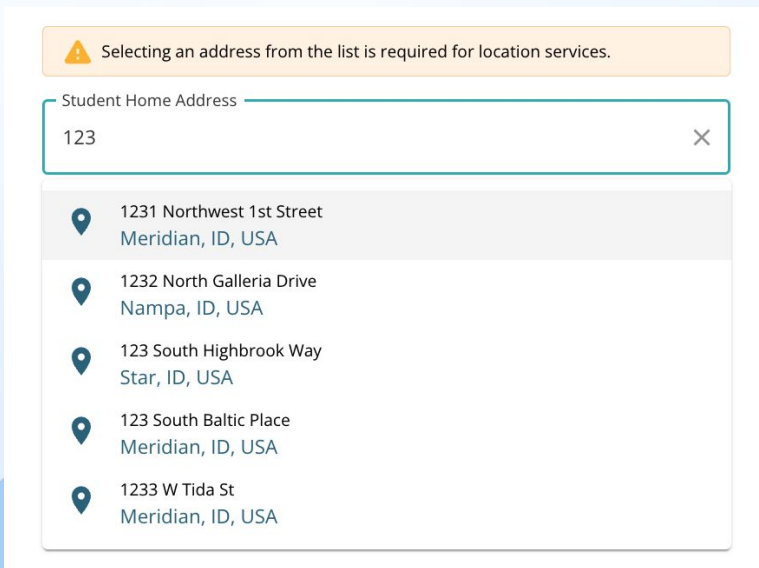
When could a student's geocode lat/long be missing?

- If the student addresses are imported into Enroll without the geocode lat/long values
 - Imports don't currently trigger the geocode service
 - Some orgs import student address lat/long values and that works fine

Geocodes for Addresses

Encouraging Parents/Admins to Select Address Suggestions

- A new warning banner encourages admins and parents to select from the address suggestions.
 - Note: This is disabled for recommendations because it should not apply on that address field.



The screenshot displays a web interface for address selection. At the top, an orange warning banner with a triangle icon contains the text: "Selecting an address from the list is required for location services." Below this is a text input field labeled "Student Home Address" containing the text "123". To the right of the input field is a close button (X). Below the input field is a list of five address suggestions, each preceded by a location pin icon:

- 1231 Northwest 1st Street
Meridian, ID, USA
- 1232 North Galleria Drive
Nampa, ID, USA
- 123 South Highbrook Way
Star, ID, USA
- 123 South Baltic Place
Meridian, ID, USA
- 1233 W Tida St
Meridian, ID, USA

Geocodes for Addresses

We created a nightly job that runs the geocode service:

- Starts running at 12:00AM CT across all of the Enroll orgs
- Searches for missing values in the address_lat and address_lng fields in student_annual for parent-viewable school years
- Runs the geocode service for student address to get lat/long values
- If HERE/Google can't provide the geocode, then the record is flagged to skip next time
- If the address is updated, the "skip" flag is reset
- We will look for opportunities to enhance this feature in the future

How do I set up this feature?

No setup needed. The geocode job will run nightly for every org.

Troubleshooting Tips

- Does not solve these issues:
 - Missing or wrong address (must be entered or imported)
 - Wrong lat/long values selected when merging duplicate student records
 - When the student address is not recognized by HERE/Google
 - When the school address is missing a geocode

Troubleshooting Tips

- To trigger the geocode service manually, click within the address field and then click tab to navigate away
- An admin can fix a missing school geocode by triggering the geocode service manually in that way
- For addresses that HERE/Google don't recognize, consider using Google Maps or another map tool to get lat/long values as close as possible, then use Sync Service to import those values to the address_lat and address_lng fields

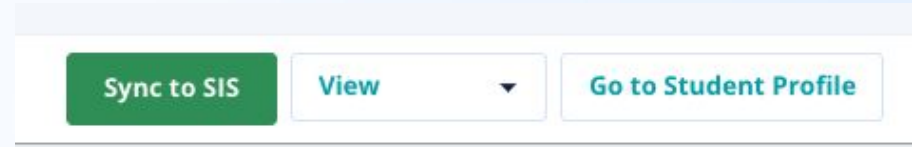
Bulk Export Registrations

Instead of clicking “Sync to SIS” for each student one at a time



Bulk Export Registrations

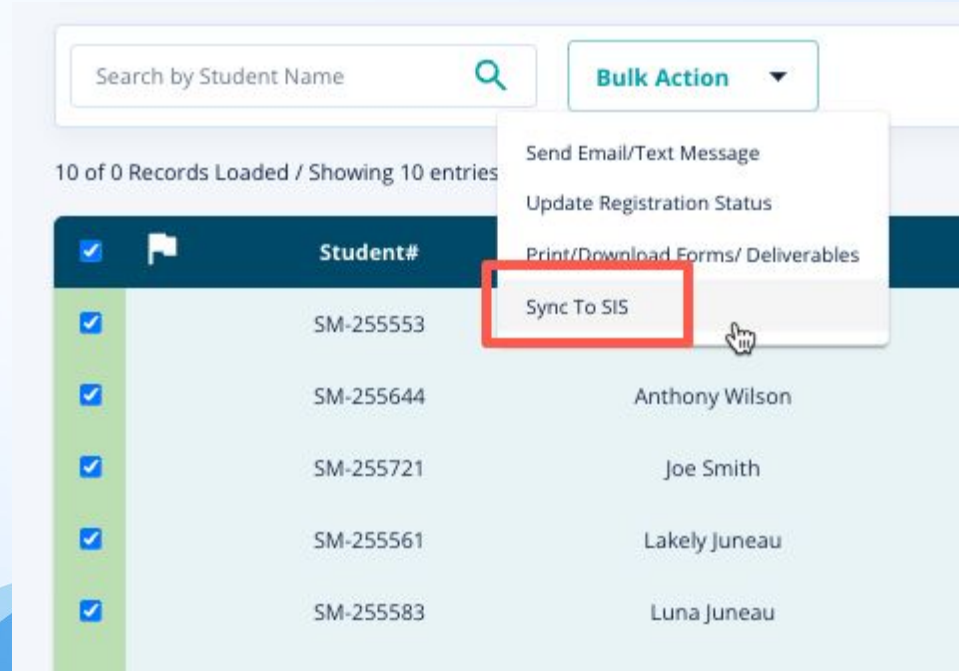
- Today, admins must click Sync to SIS for each student registration to export the registration from Enroll
- In 1.4, we added a bulk action to bulk export registrations



Bulk Export Registrations

On the Registrations page:

1. Filter for approved registrations
2. Select the registration records to export
3. Open the Bulk Actions menu
4. Choose Sync to SIS



The screenshot displays the Registrations page interface. At the top, there is a search bar labeled "Search by Student Name" and a "Bulk Action" dropdown menu. Below the search bar, a status message reads "10 of 0 Records Loaded / Showing 10 entries". The main table lists student records with columns for selection, flags, student ID, and name. The first five rows are selected, indicated by blue checkmarks in the selection column. A context menu is open over the first row, showing options: "Send Email/Text Message", "Update Registration Status", "Print/Download Forms/ Deliverables", and "Sync To SIS". The "Sync To SIS" option is highlighted with a red rectangle, and a mouse cursor is pointing at it.

	Student#	
☒	SM-255553	
☒	SM-255644	Anthony Wilson
☒	SM-255721	Joe Smith
☒	SM-255561	Lakely Juneau
☒	SM-255583	Luna Juneau

Troubleshooting Tips

- Only approved registrations can be exported
- Exports are processed through Sync Service one student record at a time
- Check the Export Logs in Sync Service for the status and any error messages
- SIS API connections will send the student registration to the SIS right away
- SFTP connections queue up exported records until the admin runs the export in Sync Service, which creates a CSV file and posts it in the /export folder on the SFTP server



A background image of students in a classroom, overlaid with a blue gradient. The students are focused on their work, with one student in the foreground smiling while writing.

Sync Service Mapping Index

Enhancement to the Contact Mapping/Table Lookup Feature



Sync Service Mapping Index

- A new way to set up a Table Lookup condition (Contact Mapping)
- In this context, “index” means “the order that a record appears in a table”
- Index is useful when multiple records in a table match certain criteria, so you want to choose the first occurrence or second occurrence to map to, for example

Sync Service Mapping Index

- Index = 1 would import the first record to meet the criteria.
Index = 2 would import the second record, and so on.
- Not setting the index would import by default the first record to meet the criteria.
- Contact your Onboarding Specialist or Support for help with Sync Service mapping questions.