

 **SchoolMint** Enroll

1.7 Amazing Features

SUMMER RELEASE PART 1:

Table Refactor, Admin Create a Student, Print Forms, Sync Service Enhancements, and more!

Feature Walkthrough / Product & Engineering



Targeted for July 15, 2022

Enroll 1.7 New Features

- Table Refactor
- Search by Student ID
- Admin Create a Student
- Print Forms
- Auto-Denial Warning Email
- Lottery Placement Movement
- Deactivated Users
- Report Builder Update
- Sync Service Enhancements

Table Refactor

Refactor of tables to allow for infinite scrolling



Table Refactor

- Updates to the following tables to allow for infinite scrolling
 - Student
 - Application
 - Registration
 - Users (Admin, Guardian, Deactivated Users)

Table Refactor

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Manage Students

Show Duplicates Only

Bulk Action Search

5922 Results / 0 Selected

Student#	Full Name	Parent	DOB	Previous Grade	Previous School	Grade	School	Choices	Actions
<input type="checkbox"/> SM-4550110	Aaron Hebert		2020-05-30	2		2		0	
			2020-05-30	5		5		0	
			2020-05-30	6		6		0	
			2020-05-30	11		11		0	
			2020-05-30	6		6		0	
			2020-05-30	5		5		0	
			2020-05-30	1		1		0	
			2020-05-30	1		1		0	

For Student, Admin, and Guardian tables you no longer need to filter to view the data. Table will load with all data and the admin user can then filter based on their search criteria.

Bulk Selections

Manage Students

Show Duplicates Only

Bulk Action ▾

Search by Student Name or Student ID



Search

5919 Results / 5919 Selected

<input checked="" type="checkbox"/>	Student#	Full Name	Parent	DOB	Previous Grade	Previous School	Grade	School	Choices	Actions
<input checked="" type="checkbox"/>	SM-4539851	Aaliyah Cabello		2020-05-30	1		1		0	
<input checked="" type="checkbox"/>	SM-4594562	A								
<input checked="" type="checkbox"/>	SM-4551530	A								
<input checked="" type="checkbox"/>	SM-4562070	A								
<input checked="" type="checkbox"/>	SM-4579072	A								
<input checked="" type="checkbox"/>	SM-4587982	A								
<input checked="" type="checkbox"/>	SM-4541883	Aali								
<input checked="" type="checkbox"/>	SM-4600243	A								

Manage Students

Show Duplicates Only

Bulk Action ▾

Search by Student Name or Student ID



Search

5919 Results / 5916 Selected

<input checked="" type="checkbox"/>	Student#	Full Name	Parent	DOB	Previous Grade	Previous School	Grade	School	Choices	Actions
<input checked="" type="checkbox"/>	SM-4539851	Aaliyah Cabello		2020-05-30	1		1		0	
<input type="checkbox"/>	SM-4594562	Aaliyah Carazo		2020-05-30	1		1		0	
<input type="checkbox"/>	SM-4551530	Aaliyah Celaya		2020-05-30	4		4		0	
<input type="checkbox"/>	SM-4562070	Aaliyah Galvez		2020-05-30	1		1		0	
<input checked="" type="checkbox"/>	SM-4579072	Aaliyah Moore		2020-05-30	11		11		0	
<input checked="" type="checkbox"/>	SM-4587982	Aaliyah Terry		2020-05-30	6		6		0	
<input checked="" type="checkbox"/>	SM-4541883	Aaliyah Valenzuela		2020-05-30	2		2		0	
<input checked="" type="checkbox"/>	SM-4600243	Aalyah Basto		2020-05-30	6		6		0	

When using bulk actions the number selected will be properly reflected.

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.

Search by Student ID

Complete searches using the student's ID



Search by Student ID

This feature allows admins to search for/filter students by using their student ID for the following:

- Students table
- Registrations table
- Applications table
- Student lookup / merge student





Search by Student ID

The screenshot displays the SchoolMint Enroll interface. At the top, a navigation bar includes icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main heading is "Manage Students". Below this, there is a search bar with the placeholder text "Search by Student Name or Student ID" and a "Search" button. An orange box highlights the search bar, and an arrow points from it to a second screenshot below. In the second screenshot, the search bar contains the text "1234" and is also highlighted with an orange box. Below the search bar, the results are shown as a table with 2 results. A yellow callout box on the right side of the image contains the text: "Admins have the ability to search by student ID. Using partial search results admins can then find and select the student based on their search criteria."

5922 Results / 0 Selected

Student#	Full Name	Parent	DOB	Previous Grade	Previous School
SM-5026787		Genaro Guerrero			
SM-5026792		Elizabeth Briney Poboy Academy			
SM-5056523					
SM-4637270					
SM-4637274					
SM-4637276					
SM-4637278					
SM-4637280					
SM-4637282					

2 Results / 0 Selected

Student#	Full Name	Parent	DOB	Previous Grade	Previous School	Grade	School	Choices	Actions
12345	Bob Ross	Elizabeth Briney	2015-07-21		Westbrook Leadersh...	11		2	 
SM-4612341	Efrain Garcia Campa...		2020-05-30	5		5		0	 

Admin Create a Student

Admins are now able to create new students or add existing students to guardian profiles without leaving their admin accounts.



Admin Create a Student

- Ability to link an existing student to a guardian.
- Ability to create a new student for a guardian.
- Ability to view and update the Student information form on the student profile.

Add an Existing Student

The screenshot displays a user interface for a guardian profile. On the right side, there is a button labeled "Login as a Guardian". On the left, a sidebar contains "Account Information", "Students (1)", and "Notes". The main content area is titled "Student(s)" and features a teal card for "Eric Taylor" with an edit icon, and a dashed box with a "+ Add Student" button. A teal button labeled "+ Add an Existing Student" is positioned to the right of the "Add Student" box. Below this, the "Eric's Choice Application" section shows a card for "East West - IB Program" with a "Choice 1" button and a status indicator "Submitted & In Processing". At the bottom right, there is a teal button labeled "+ Applications".

Login as a Guardian

Account Information

Students (1)

Notes

Student(s)



Eric Taylor



Add Student

+ Add an Existing Student

Eric's Choice Application



East West - IB Program

Choice 1



Submitted & In Processing

+ Applications

In the guardian profile the admin will see the option to add an existing student.

Add an Existing Student

Student Lookup



This will bring up a student look up where the admin can Search for student by student ID, name or DOB

Student Lookup

4522



Select student to add to guardian account (4 matches)

Student #	Full Name	DOB	21/22 Grade	21/22 School
<input type="radio"/> 4522365	Henry C LeBlanc	01/10/2010	6	
<input checked="" type="radio"/> 4545223	Antonio Guerra	05/30/2020	2	
<input type="radio"/> 4584522	Elejandra Serrano	05/30/2020	8	
<input type="radio"/> 6745226	halo wie getz	01/02/2015	10	

The admin can then select a student to continue to the next step.

Add an Existing Student

Must click 'Save Student' to continue.

Admin is brought to the student information form to review and make updates if needed.

Account Information

Students (1)

Notes

Add Student: Student Information

Cancel Save Student

First Name *
Antonio

Last Name *
Guerra

Grade Level *
2

Date of Birth *
05/30/2020

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

Student Home Address

Add an Existing Student

Antonio Guerra has been added to this guardian account.

Toaster display to confirm student has been added.

Account Information

Students (2)

Notes

Student(s)



Antonio Guerra



Eric Taylor



Add Student

+ Applications

Student is added to guardian 'Students' tab; number increases by 1.

ic's Choice Application

East West - IB Program

Choice 1

Submitted & In Processing

+ Applications

Create a New Student

Guardian: *Jimmy Dean*

Login as a Guardian

Account Information

Students (0)

Notes

Student(s)

+ Add an Existing Student

No students associated with guardian user.

+ Add Student to Guardian Account

Using the add student button an admin can create a new student for the guardian.

Create a New Student

Guardian: Jimmy Dean

Login as a Guardian

Account Information

Students (0)

Notes

Add Student: Student Information

First Name *

Tommy

Last Name *

Dean

Grade Level *

6

Date of Birth *

01/01/2011

1. The admin will fill out the student information form

Guardian: Jimmy Dean

Login as a Guardian

Account Information

Students (1)

Notes

Student(s)

+ Add an Existing Student

📖 Tommy Dean ✎

+ Add Student

There are no applications for Tommy Dean in 2021-2022.

+ Add Applications for Tommy Dean

2. The student is now present on the guardian profile

Student Information Form on Student Profile

The screenshot displays the SchoolMint Enroll interface for a student profile. The top navigation bar includes the SchoolMint Enroll logo and several menu items: Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main header identifies the student as "Student: Aalyah Basto". Below this, there are three buttons: "Merge", "Change History", and "Communications Log", along with a "Save Student" button on the right. A left-hand sidebar contains a list of tabs: "Profile", "Information Form", "Applications", "Registration", and "Notes". The "Information Form" tab is selected and highlighted. The main content area is titled "Add Student: Student Information" and contains three input fields: "First Name*" with the value "Aalyah", "Last Name*" with the value "Basto", and "Grade Level*" with the value "6". An orange callout box with a white border and an arrow pointing to the "Information Form" tab contains the text: "The Student Information Form is now available on the Student Profile".

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Student: Aalyah Basto

Merge Change History Communications Log Save Student

Profile
Information Form
Applications
Registration
Notes

Add Student: Student Information

First Name*
Aalyah

Last Name*
Basto

Grade Level*
6

The Student Information Form is now available on the Student Profile

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

Print Forms

Print application and registration forms



What is print forms?

Admins can download and print student application and registration forms.

How to print a form

- Navigate to a single application or registration and click the print icon, or select multiple applications or registrations and select the “Print/download Forms” bulk action
- Select which form steps to print
 - Note: If multiple form types are selected, then you will only have the option to print all steps
- An email notification is sent with the link to download
- The download is a zip file containing one PDF per student per form
- File naming convention allows easy sorting by student name

Print Forms: Permissions

Super Admins get permission by default. Other User Groups have the permission unchecked by default.

Manage Users

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Sync Service

Boundaries

Internal

Migration Import

Imports

Super Admin: Edit

Information

Group Name*
Super Admin

SSO Group Identifier*

Module Access

Applications

- View Applications
- Edit Applications
- Delete Applications
- Withdraw Applications
- Update Eligibility Status
- View Only Ranking

Bulk Permissions

- Send Bulk Emails
- Bulk Set Eligibility

Documents

- Download Attachments
- Print Forms

Lottery

- Run Lotteries
- Manage Cutoff N
- View Offered Lis
- View Waiting List
- Delete Lotteries
- View Cutoff Num
- Move Individual Placements
- Manage Prioritie

Notes

- View/Edit Notes
- Create Guardian

Reports

Print Forms: Where can you print?

You can print from the application or registration pages.
Add filters and apply.

SchoolMint Enroll

Dashboard Students **Applications** Lotteries **Registrations** Reports Scheduling Users

Student Applications

3 TOTAL STUDENTS	3 TOTAL APPLICATIONS	3 SUBMITTED APPLICATIONS
<p>Filter by Status</p> <p>Show applications:</p> <p><input checked="" type="checkbox"/> Submitted</p> <p><input type="checkbox"/> Not Submitted</p> <p>With Status:</p> <p><input type="checkbox"/> Eligible</p> <p><input type="checkbox"/> Ineligible</p> <p><input type="checkbox"/> In processing</p> <p>Submission Date Range:</p> <p>From <input type="text"/> To <input type="text"/></p> <p>Withdrawn:</p> <p><input type="checkbox"/> Withdrawn</p> <p><input checked="" type="checkbox"/> Not Withdrawn</p> <p>Lotteries:</p> <p>Lottery List <input type="text"/> Lottery Status <input type="text"/></p>	<p>Filter by Application Attribute</p> <p>Form Process <input type="text"/></p> <p>School <input type="text"/></p> <p>Grade <input type="text"/></p> <p>Category <input type="text"/></p> <p>Program <input type="text"/></p> <p>Priority <input type="text"/></p> <p>Recommendations <input type="text"/></p>	<p>Filter by Student Attributes</p> <p>Search by Student Name or Student ID <input type="text"/></p> <p>Flags <input type="text"/></p>

Clear All Filters Apply Filters

Print Forms

Select one application or bulk select multiple applications, then select the **Print/Download Forms** bulk action.

Bulk action print

The screenshot shows the 'Bulk Action' dropdown menu with the following options: Send Email/Text Message, Update Application Status, **Print/Download Forms**, and Resend Recommendation Requests. Below the menu is a table with columns: App#, Category, Program, Grade, Sib, Priority, Recommendations, and Actions. Two rows are visible, both with checkboxes selected.

App#	Category	Program	Grade	Sib	Priority	Recommendations	Actions
3394339	Open Enrollment	...	10		2	2022-4	[Icons]
3394346	Open Enrollment	...	5		2	2022-4	[Icons]

Print Single Application Form



The screenshot shows the 'Choice Application: Edit' form. At the top right, there is a 'Withdraw' button, a print icon (highlighted with an orange box), a 'View' dropdown menu, and a 'Go to Student Profile' button. Below the form, there is a 'Save Application' button.

Print Single Registration Form



The screenshot shows the 'Enroll: Edit' form. At the top right, there is a 'Withdraw' button, a print icon (highlighted with an orange box), a 'Sync to SIS' button, a 'View' dropdown menu, and a 'Go to Student Profile' button. Below the form, there is a 'Save Registration' button.

Print Forms

Select desired fields and click **Print Selected**

Student Applications

3 3 3

TOTALS APPLICATIONS

Filter by Status
Show applications:

Submitted
 Not Submitted

Submission Date Range:
From

Withdrawn:
 Withdrawn
 Not Withdrawn

Lotteries:
Lottery List

Print/Download Forms

Select Items to Print
 Select All

Forms
 Select All Forms
 QAA Parent Application Flow

Form Steps:
 Select All Steps
 Student Information
 Guardian Info
 Pick Your Programs
 About You
 Admin Only - Approvals

Select All Admin Only Steps
 Select All Admin Only Steps

Cancel Print Selected

Search by Student Name Bulk Action

3 of 3 Records Loaded / Showing 3 entries / 3 Records Selected

App#	Full Name	Rank	Category	Program	Grade	Sib	Priority	Recommendations	Actions
------	-----------	------	----------	---------	-------	-----	----------	-----------------	---------

If multiple form types are selected, then you will only have the option to print all steps

Print/Download Forms

To print individual steps without printing the entire form, filter the table results by form process, then select and print.

Select Items to Print
 Select All

Forms
 Select All Forms
 Choice Application
 PreK Application
 Transfer Request

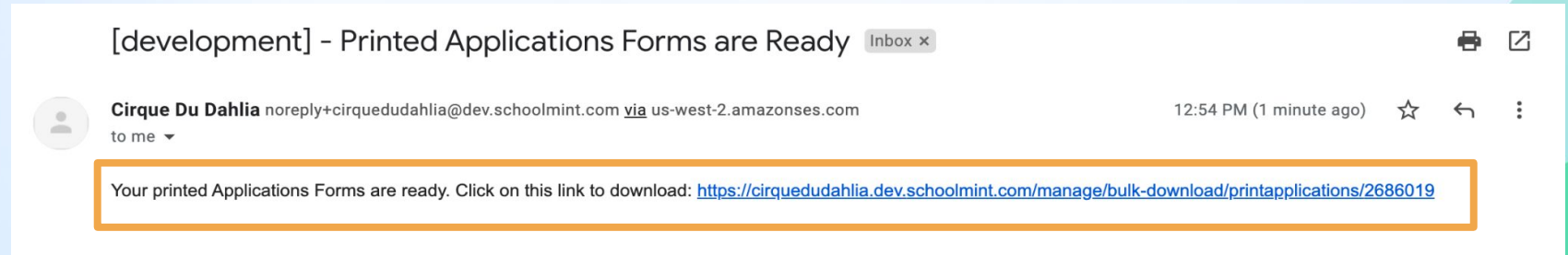
Cancel Print Selected

Print Forms

Message with a green check mark will let you know an email is being sent to you

✓ You will receive an email once the application form(s) are ready to be printed/downloaded. Click the link in your email to print/download the form(s).

The email with the link to download the file will look similar to this:




Print Forms

PDF File Naming Convention

Files will automatically sort efficiently for customers when they put all of their files in the same directory.

[Last Name]-[First Name]-[Middle Name]-[StudentID]-[Form Name]-[App or Reg]-[DateTime].pdf



 Smith-Dahlia-7007847-QAA+Parent+Application+Flow-App-22-07-05-10/54/24.pdf 34 KB PDF Document Yesterday at 12:59 PM

Note: If no middle name exists, then it will be omitted from the file name.

Example PDF Output

The information shown in the PDF is virtually identical to the information shown in the Review and Send step of the form process.

Dahlia Smith

QAA Parent Apply Flow Program - Active | Enrollment Year: 2021-2022

App# 3394339 | Student #: 7007847 | Grade Applying: 10 | Submitted Date: Mar 16, 2022

1. Student Information

Student First Name	Dahlia
Student Last Name	Smith
Student Birthdate	2006-03-01
Grade Level	10
Student Home Address:	[REDACTED]
Student Home Address 2:	
Student Home Address City:	[REDACTED]
Student Home Address State:	[REDACTED]
Student Home Address Zip Code:	[REDACTED]

2. Guardian Info

Guardian 1 First Name	Chad
Guardian 1 Last Name	Smith
Guardian 1 email	[REDACTED]
Guardian 1 Cell Phone	[REDACTED]

3. Pick Your Programs

Program 1	
School Name:	QAA Parent Apply Flow School
School Address:	Arizona Mills
Program:	QAA Parent Apply Flow Program - Active



Auto-Denial Warning Email

Admin-facing feature to send warning email to parents before auto-denial



Auto-Dcline Warning Email

Set a date and time to automatically send a warning email to parents before their application is auto-declined

Auto-Decline Warning Email

Current behavior: guardians get an email when their child receives an offer with the auto-decline date and time included

New feature: an additional email can be sent to guardians to warn them of the upcoming date and time of the auto-decline

Auto-Delay Warning Email

Manage auto-decline setting through the **Lottery Settings** page

Settings > Lotteries > Settings

Manage Lotteries

- General
- Schools/Programs
- Date & Time
- Manage Users
- Lotteries**
- Content/Letters
- Custom Data
- Forms
- Guardian Theme
- Roll Over
- Sync Service
- Boundaries
- Internal

Lottery Settings


GLOBAL BY FORM PROCESS (3)

[Cancel](#) [Save Settings](#)


Notifications

- Show lottery results on parent dashboard
- Show waiting list number on parent dashboard

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 * or/and On This Date * 

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

Auto-Delay Time* 

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

- Set a reminder email/text message to warn guardians before auto-decline

Auto-Decline Warning Email

Click checkbox to send an auto-decline warning email then specify the number of days

Set a reminder email/text message to warn guardians before auto-decline

Days Before Auto-Decline *

1

at

This Time *

05:00 PM



An email and/or text message will be sent to the guardian on the selected number of days before auto-decline happens.

Auto-Dcline Warning Email Template

Edit the email template through the **Content/Letters** page

Settings > Content Letters > Email Text Templates > Edit

Content/Letters

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Sync Service

Boundaries

Lottery Placement Decline Warning: Edit

Cancel

Save Template

General Information

Content Name*

Lottery Placement Decline Warning

Type

Lottery

Description

Notification sent to parent when auto-decline date is getting closer

Information

All Schools/Programs

Language & Translations

EN

ES

Enter Email Subject Line*

Lottery Placement Decline Warning

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

The lottery for {\$application->program->title} has been run. Reminder! {\$student->fname} {\$student->lname} has been offered admission! Accept your placement by {\$auto_decline_date} to avoid being automatically declined.

A smiling woman with curly hair, wearing a patterned top, is holding a tablet and looking towards the camera. She is in a classroom setting with other students visible in the background. The image has a blue and green color overlay.

Lottery Placement Movement

Student lottery placement movement log



Lottery Placement Movement

Any movement or changes made to a students placement in a lottery will show in the logs

Lottery Placement Movement

Manual lottery movements can be done with a note/reason.

The screenshot displays the SchoolMint Enroll interface. At the top, a navigation bar includes 'Dashboard', 'Students', 'Applications', 'Lotteries', 'Registrations', 'Reports', 'Scheduling', and 'User'. The main header is 'Lotteries & Placements', with sub-links for 'Lottery Dashboard', 'View Settings', and 'Export L...'. The background shows a lottery run for 'East West -' with a 'Show Student Name' checkbox checked and a 'Grade: 6' filter. Two lists are visible: 'OFFERED LIST' with one student (Rank 1) and 'WAITING LIST' with one student (Rank 1). A modal window titled 'Adjust Application Placement' is open, showing details for 'George Washington' (Birthdate: 01/15/2010, Grade: 6, Guardian(s): 976740: Elizabeth Briney). The 'Current Position' is 'Offered'. The 'Update Placement Status' dropdown is set to 'Declined'. Two radio buttons are present: 'Move George on to the offered list' (selected) and 'Move George to [] on the waiting list'. A text area for 'Notes / Reason *' contains the text 'Sorry George. I know you are awesome.' and is highlighted with an orange border. At the bottom right of the modal are 'Cancel' and 'Save Placement' buttons.

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling User

Lotteries & Placements

Lottery Dashboard View Settings Export L...

East West -

View lottery runs, adjust...

Show Student Name

Grade: 6

OFFERED LIST

Rank
1

WAITING LIST

Rank
1

Adjust Application Placement

George Washington Birthdate: 01/15/2010 Grade: 6 Guardian(s): 976740: Elizabeth Briney

Current Position: Offered

Update Placement Status: Select Status
Declined

Move George on to the offered list
 Move George to [] on the waiting list

Notes / Reason *
Sorry George. I know you are awesome.

Cancel Save Placement

Lottery Placement Movement

Navigate to an application and click the Placement History button to see all changes to lottery movement!

The screenshot displays the 'Choice Application : Edit' page in the SchoolMint Enroll system. At the top, a navigation bar includes 'SchoolMint Enroll' and various menu items: Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main content area is titled 'Choice Application : Edit' and features a toolbar with 'Withdraw', 'View', and 'Go to Student Profile' buttons. Below this, the application details for 'George Washington' are shown, including the student ID '4637009' and guardian information 'Elizabeth Briney'. A 'Save Application' button is present. The application is for the 'East West - IB Program', with a '# on Offered List' indicator. Two status panels are visible: 'Application Status' with radio buttons for 'Submitted' (selected), 'Not Submitted', 'Eligible', 'Ineligible', and 'In Processing'; and 'Lottery Status' with radio buttons for 'Accepted', 'Declined' (selected), and 'Pending'. A 'Placement History' button is highlighted with an orange box in the bottom right corner of the Lottery Status panel. A 'Submitted On' date field is also present at the bottom left.

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Choice Application : [Edit](#)

George Washington

Student ID: 4637009 Guardian(s) [Add/Manage](#)
SIS Student ID 976740: Elizabeth Briney

Application to: **East West - IB Program**

Application Status

Submission: Submitted Not Submitted

Eligibility: Eligible Ineligible In Processing

Submitted On
Central Time

Lottery Status

Ranking:

Status: Accepted Declined Pending

Lottery Placement Movement

All automated and manual lottery movements will display in the dialog

The dialog box, titled "Application Placement History", displays the following information:

- Student:** George Washington
- Birthdate:** 01/15/2010
- Grade:** 6
- Guardian(s):** 976740: Elizabeth Briney
- Program:** East West - IB Program

Date	User & IP	Movement	Reason
07/06/2022 05:14:10 PM	Chad Smith 65.129.77.55	George Washington was moved from Accepted to Declined	Sorry George. I know you are awesome.

At the bottom right of the dialog is a "Close" button. Below the dialog, the main application interface shows several radio button options: Submitted, Eligible (selected), Not Submitted, Ineligible, In Processing, # on Offered List, Accepted, Declined (selected), and Pending. There is also a "Placement History" button and a "Submitted On" field with a calendar icon.

Deactivated Users

Locate users that were deactivated and have the option to reactivate them



Deactivated Users

Admins can now locate deactivated admins and guardian accounts then reactivate those accounts

- New page for admins to locate and re-activate deactivated accounts.

Deactivated Users

Pre-existing behavior to deactivate accounts:

1. Manage admin and guardian access under the **Guardian Accounts** page

Settings > Manage Users

Manage Users

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Add, edit, and delete admin users and parent accounts.

User Groups & Permissions



Admin Accounts



Guardian Accounts



Login Attempts



Deactivated Accounts



Deactivated Users

- Pre-existing behavior to deactivate accounts:
2. Click on the edit icon to view that users access settings

Manage Users

Settings > Manage Users > Guardian Accounts

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Guardian Accounts

Update guardian account information.

Bulk Action ▾

Search by Guardian Name



Search

5 Results / 0 Selected

<input type="checkbox"/>	ID	Guardians Name	Email	Phone	SSO	Actions
<input type="checkbox"/>	1002840	[REDACTED]	[REDACTED]	[REDACTED]		<input type="button" value="Login"/>
<input type="checkbox"/>	2221812	[REDACTED]	[REDACTED]	[REDACTED]		<input type="button" value="Login"/>
<input type="checkbox"/>	2221813	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input type="button" value="Login"/>
<input type="checkbox"/>	2250407	[REDACTED]	[REDACTED]	[REDACTED]		<input type="button" value="Login"/>
<input type="checkbox"/>	2356645	John Carter	[REDACTED]	[REDACTED]		<input type="button" value="Login"/>

Edit

Deactivated Users

Pre-existing behavior to deactivate accounts:

3. Access for admins and guardians can be removed by un-checking both settings under the **Manage Access** area

Guardian: **John Carter**

Login as a Guardian

Account Information

Students (0)

Notes

Guardian Account

Cancel Save Guardian

First Name *
John

Last Name *
Carter

Email

Phone

Preferred Language *
English

Change Password

Confirm Password

Preferred Communication *
Select At Least One

Enable SMS Text Notifications

Enable Email Notifications

[Privacy Policy](#)

Manage Access

Allow ADMIN Access

Allow GUARDIAN Access

Deactivated Users

When access is removed for these users, admins can locate them through the **Manage Users** page under **Deactivated Accounts**

The screenshot displays the 'Manage Users' interface. On the left is a sidebar with navigation options: General, Schools/Programs, Date & Time, Manage Users (highlighted), Lotteries, Content/Letters, Custom Data, and Forms. The main content area is titled 'Manage Users' and includes a breadcrumb 'Settings > Manage Users'. Below the title is a sub-header: 'Add, edit, and delete admin users and parent accounts.' There are five interactive cards with right-pointing chevrons: 'User Groups & Permissions', 'Admin Accounts', 'Guardian Accounts', 'Login Attempts', and 'Deactivated Accounts'. The 'Deactivated Accounts' card is highlighted with an orange border.

Settings > Manage Users

Manage Users

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

Add, edit, and delete admin users and parent accounts.

- User Groups & Permissions >
- Admin Accounts >
- Guardian Accounts >
- Login Attempts >
- Deactivated Accounts >**

Deactivated Users

Search by name or email address then click the edit icon


Settings > Manage Users > Deactivated Accounts

Manage Users



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

Deactivated Accounts

Manage access or delete deactivated users.

Search by Name or Email
John  [Search](#)

1 Results

Username / Email	Name	Actions
 @gmail.com	John Carter	

Deactivated Users

Reactivate an admin or guardian's access by clicking the checkbox under **Manage Access** and click **Save Account**

Deactivated Account: **John Carter**

Account Information

Deactivated Account

Cancel

Save Account

First Name*
John

Last Name*
Carter

Email
johncarter.er8@gmail.com

Preferred Communication*

Select At Least One

Enable SMS Text Notifications

Enable Email Notifications

[Privacy Policy](#)

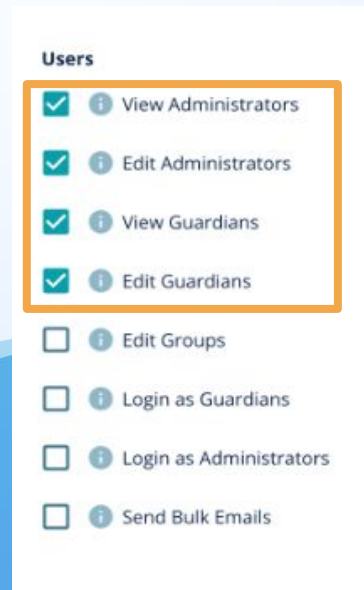
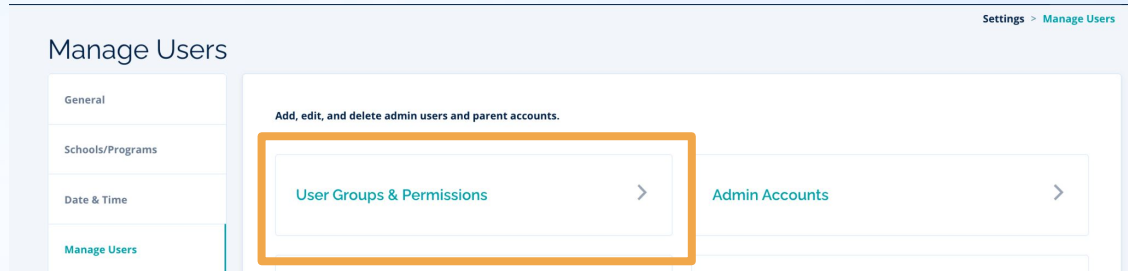
Manage Access

Allow ADMIN Access

Allow GUARDIAN Access

Deactivated Users: Permissions

- All admins can see this new deactivated users view, but only admins with permissions can save changes
- In order to give an admin access to save changes, an admin with permissions will have to adjust the **User Groups & Permissions** page



FAQ's

1. **Is any information cleared out when a user is deactivated?**

- Guardian accounts are not cleared but permissions are cleared for deactivated admin accounts. As the admin, you may have to reset re-activated admins program permissions.

2. **Will admins and guardians need to create a new password when they are reactivated?**

- No, they can use the same password that they previously used.

3. **Can we delete admin or guardian accounts?**

- No, it's best practice to deactivate accounts instead of deleting. Data could be tied to other things and cause issues if deleted.

A photograph of students in a classroom, overlaid with a blue and green gradient. The students are focused on their work, with one student in the foreground smiling while writing in a notebook. The text 'Report Builder' is prominently displayed in white on the left side of the image.

Report Builder



Report Builder 1.7

Report Builder 1.7 Features:

- Program Name in addition to just Program ID
- School Name in addition to just School ID
- Most enhancements are in v1.8

Program_ID_App	prog_name_app	School_ID_Reg	School_Name_Reg
11582	Bullis Charter School - 22-23 Enr...	9044	Bullis Charter School

Sync Service



Sync Service 1.7

Sync Service 1.7 Features:

- Schedule Exports
- Schedule Imports/Exports for Non-Prod Environments
- Student Examples for Exports
- Date/Time Transformations
- Phone Number Transformations
- Nestable Substitute Transformations
- App Import Update
- Validations, Error Handling, & Optimizations
- Internal Tools for Troubleshooting
- Bug Fixes

Sync Service 1.7

- Schedule Export to SFTP (registration records)
- Enable scheduled import or export for non-prod environments (Staging and Beta)

Manage SIS & Schedule Imports

Sync Service Application

Log in below to manage SIS or SFTP connections and field mapping/transformations. Then return to this page to enable and schedule your nightly import.

[Sync Service Login](#)

Schedule Import

Enable for


Time of the Day
12:00 AM

[Submit](#)

Schedule Export

Enable Nightly Export

Enable for beta environment

Time of the Day
12:00 AM 


Central Time

[Submit](#)

Schedule Export

Enable Nightly Export

Enable for beta environment

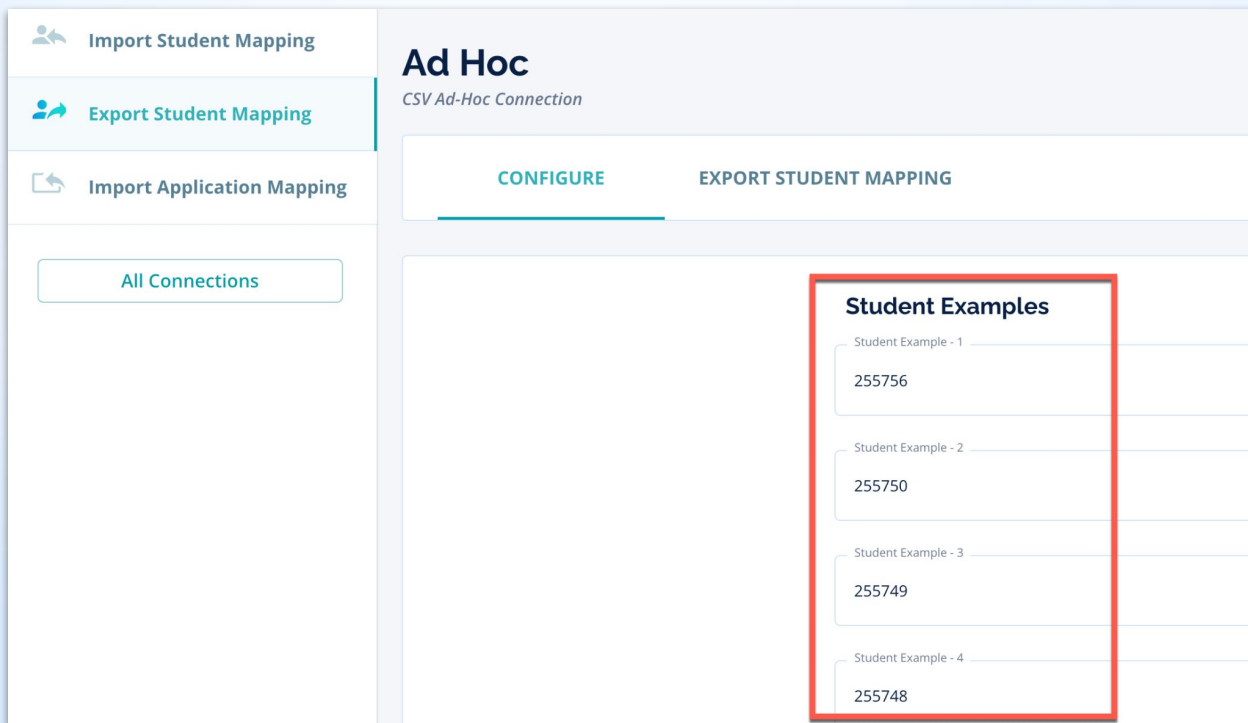
Time of the Day 

Central Time

[Submit](#)

Export: Student Examples

- Set student IDs for export examples in mapping



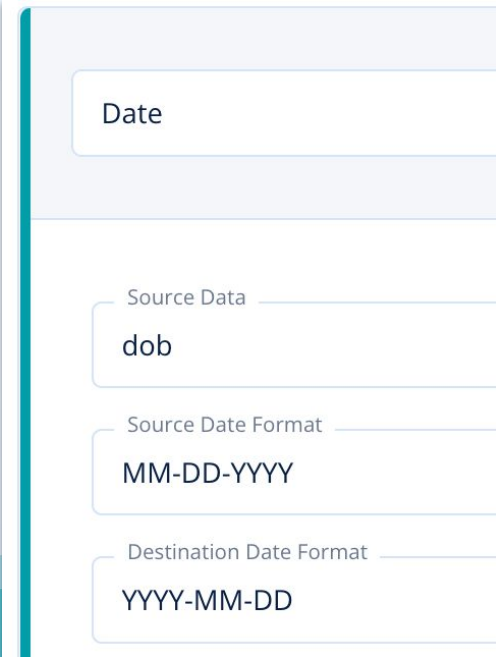
The screenshot displays the 'Export Student Mapping' interface for an 'Ad Hoc' connection. The left sidebar contains navigation options: 'Import Student Mapping', 'Export Student Mapping' (highlighted), 'Import Application Mapping', and 'All Connections'. The main content area shows the 'Ad Hoc' connection details and two tabs: 'CONFIGURE' and 'EXPORT STUDENT MAPPING'. The 'EXPORT STUDENT MAPPING' tab is active, and a 'Student Examples' table is highlighted with a red border. The table lists four student examples with their respective IDs.

Student Example	Student ID
Student Example - 1	255756
Student Example - 2	255750
Student Example - 3	255749
Student Example - 4	255748

Date & Time Format Transformations

New Date & Time transformations supported are:

- YYYY-MM-DD (Enroll db format)
- YYYY/MM/DD
- MM-DD-YYYY
- MM/DD/YYYY
- DD-MM-YYYY
- DD/MM/YYYY
- YYYY-MM
- timestamp HH:MM:SS added to any of the above
- timestamp THH:MM:SS added to any of the above



The image shows a configuration interface for date transformations. It features a header labeled "Date" and three input fields:

- Source Data:** Contains the text "dob".
- Source Date Format:** Contains the text "MM-DD-YYYY".
- Destination Date Format:** Contains the text "YYYY-MM-DD".

Phone Number Format Transformations

- Phone Transformation occurs correctly in both import and export as 9999999999 or as (999) 999-9999

Nestable Substitute Transformations

- To support more complex transformation patterns

The screenshot displays a configuration interface for transformations. It features a vertical stack of components:

- A 'Match Type' dropdown menu set to 'Exact Match'.
- A 'Find' button.
- A 'Replace' input field containing the text 'Substitute', with a close button (X) and a help icon (i) to its right.
- A second 'Match Type' dropdown menu set to 'Exact Match'.
- A second 'Find' button.
- A 'Replace' button.

Import Applications Update

- Use Student ID + Program ID as unique identifier for applications

App Import

CSV Ad-Hoc Connection

CONFIGURE IMPORT APPLICATION MAPPING

Configure your Connection

Upload CSV File *

applications_2021.csv

Student ID Field *

Student ID

Student Firstname Field *

First Name

Student Lastname Field *

Last Name

Program ID Field *

Program ID

Application Examples

Student Example - 1	Program Example - 1
123	50001
Student Example - 2	Program Example - 2
123	50002
Student Example - 3	Program Example - 3
234	50001
Student Example - 4	Program Example - 4
234	50002
Student Example - 5	Program Example - 5
345	50001

Summer Part 2 v1.8



In Progress

SUMMER PART 2 v1.8

Targeted for August 2022

- **Table Dynamic Views**
- **Calculated Fields & Scoring**
- **Conditional Fields**
- **Download Attachments**
- **Auto Decline for Registrations**
- **Form Steps Green Checkmarks Refactor**
- **Disabled Schools Management**
- **Report Builder Additional Data Models & UX Improvements**
- **Sync Service UX/UI & Transformations**



Rock Enroll!



Questions

Cindy Gould

Director of Product Management
cindy.gould@schoolmint.com

Elizabeth Briney

Product Manager
elizabeth.briney@schoolmint.com

Danny Ziebert

Chief Product Officer
danny.zeibert@schoolmint.com

Chad Smith

Product Manager
chad.smith@schoolmint.com

