

 **SchoolMint** Enroll

# 1.10 Fantastic Features

2022 Winter Release:

Appeals, Admin Notifications, Place Multiples Together, Zone School,  
Report Builder Enhancements, and more!

Feature Walkthrough / Product & Engineering



Targeted for December 8, 2022

# Enroll 1.10 New Features

- Appeals
- Dynamic Views on Student Table
- New Date Picker
- Zone School Display
- Minimum Choice Limit
- Place Multiples Together
- Scheduling Enhancements
- Admin Process Notifications
- Report Builder Enhancements
- Partial Sync



Feature Highlight

# Appeals





# Appeals

- Ability for guardians to submit appeal requests for an application process
- Admins can act on appeal requests
- Admins can configure custom appeal forms

# Appeals - Guardian Flow



1 See appeal option on the student profile when an application meets the criteria for an appeal.

3 Guardians can check the status of their appeal on their student's profile from the guardian dashboard.

2021-2022

East WestMiddle

### Adrienne's Applications

+ Applications

Choice Application [Edit Ranking](#)

**East West - IB Program**

Submitted & Ineligible

Withdraw

**Appeals (0 of 1 Completed)**

Appeal Request #1 *Pending*

East WestMiddle

2 Guardian can complete a custom appeal form and submit the request.



# Appeals - Admin Flow



Admins will see when an appeal is requested, along with the current status of the most recent appeal request, on a student's application in the application status or lottery status section based on the rule that triggered the appeal.

## Application Status

Appeal { Approved }

### Submission

- Submitted
- Not Submitted

### Eligibility

- Eligible
- Ineligible
- In Processing

Submitted On  
10/06/2022 11:31 AM



Central Time

The student's application was set to ineligible which triggered the appeal.

## Lottery Status

Appeal { Pending }

### Ranking

#1 on Waiting List

Offer Expiration Date:

Placement History

### Status

- Accepted
- Declined
- Pending

The student's application was placed in the lottery and either:

- Was placed on the waitlist
- Was auto-declined after an offer was not accepted by the set deadline

# Appeals - Admin Flow



Admins can review and act upon the submitted appeal within the student's application.

Each appeal attempt will appear as a step within the form.

## Appeal Process

Approved  Denied  Pending

Submitted on 11/07/2022, 11:37 AM

Reason for Appeal \*

The guardian is an employee at the school.

Please provide additional details \*

I am a teacher at this school.

Date & Time Signed: 11/07/2022 11:37:18 AM [Redo Signature](#)

*Renzo Arecco*

Save Appeal

# Appeals - Configure an Appeal Process



Admins have the ability to choose from 3 options that will trigger an appeal for a guardian.

## 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 by the set deadline

Configure the number of appeal chances allowed for each appeal form as well as the expiration deadline for each chance, if required.

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

11/07/2022



Expiration Date for Appeal 2





Feature Highlight

# Dynamic Views on Student Table



# Dynamic Views - Student Table



Manage Students: 2021-2022 Show Duplicates Only  Export

Bulk Action  Search by Student Name or Student ID

Save View: Edit

**General Information:**  
Name this View\*

**Access Settings**

Private Report (only accessible to you)  
 Globally Available to All Users

**Quick Filters Applied:** *Edit quick filters on the application dashboard.*

| Field                | Operator | Value |
|----------------------|----------|-------|
| Show Duplicates Only | IS       | False |

**Filters Applied:**

| Field  | Operator | Value | Actions   |
|--------|----------|-------|---|
| status | IS       | 1     | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

**Sort Data By:**  
Select Field

The feature **Dynamic Views**, that was added in 1.8 and 1.9 for the application and registrations tables, is now available on the students table.

**Admins can:**

- Configure a custom view using custom filters
- Set default a view
- Export data from the table



Feature Highlight

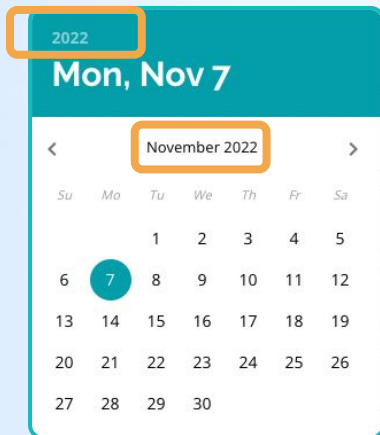
# Date Picker Update (Guardians)



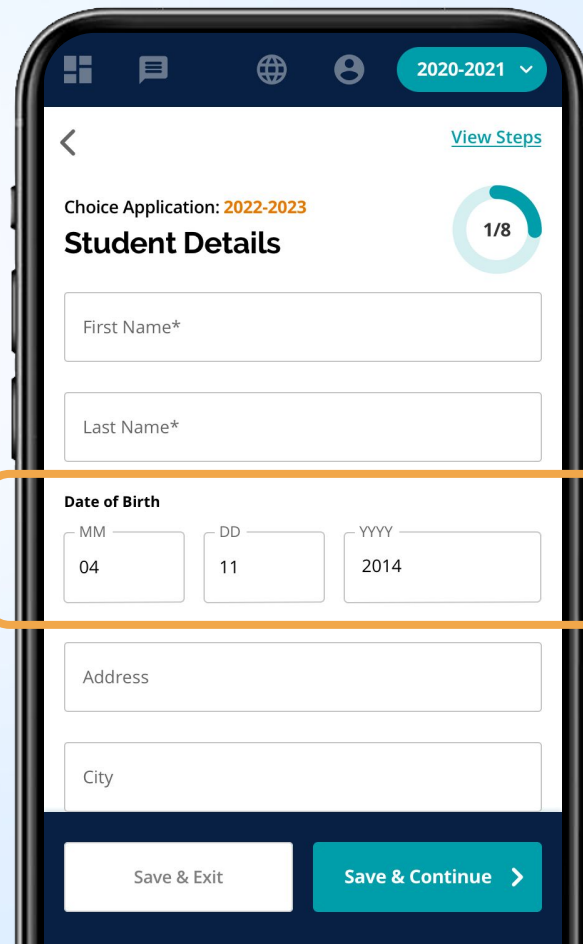
# Date Picker Update - Guardians



An update was made to the guardians datepicker for better user experience. The old datepicker made it difficult to select far in the past dates and it wasn't optimal for mobile.



The new date field allows for a better user experience by allowing the user to type in the necessary date without the need for scrolling vertically (year) and horizontally (months).





Feature Highlight

# Zone School Display



# Zone School Display - 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.

Enable the banner from the form process

## Options

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



# Zone School Display - Form Field



## Zoned School: Edit

### Field Parameters i

Field Type\*  
Dropdown

Field Description/Note

Field Label\*  
Zoned School

Required  Required Admin

### Field Options

Data Source\*  
Schools

Include "None" option

Include "None" option

Cancel

Save Field

### Data Settings i

Save To\*  
Student Annual

Field Name\*  
zone\_school\_id

Choose the field `zone\_school\_id`  
or `zone2\_school\_id`

Use the `Schools` as the  
data source

The added field will display the  
student's zoned school in the form  
based on the shapefile data.

## Zoned School

3/10

Based on the address provided the school listed below is your student's zoned school.

Zoned School  
East West Middle



Feature Highlight

# Minimum Choice Limit





## Choice Application: Edit

### Process Parameters

Form Process Name \*  
Choice Application

Total Choice Limit \*  
3

Minimum Choice Limit  
1

A setting has been added to the Application Form process type in the Form Builder. Here admins can indicate an overall minimum choice limit.





Feature Highlight

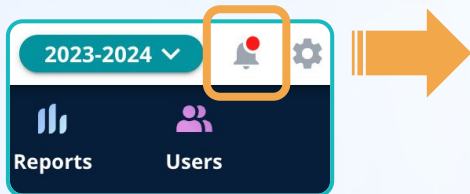
# Admin Process Notifications



# Admin Process Notifications



Notification icon with badging indicates unread notifications.



*Clicking on the Notification Icon will open the Notifications area:*

- Status: In Progress, Completed
- Convenient Link when applicable
- Filtering: Read, Unread, Date Range
- Categories: Downloads, Process, Archived
- Bulk options: Read, Unread, Archive, Unarchive

## Notifications

Bulk Actions ▼ Clear Filters Filter by ▼ Search Notifications 🔍

| <input type="checkbox"/> | Notification Name  | Status    | Link                     | School Year | Date     |
|--------------------------|--|-----------|--------------------------|-------------|----------|
| <input type="checkbox"/> | Download Forms/Attachments - Your printed Applications Form... | Completed | <a href="#">Download</a> | 2023-2024   | 11:08 am |

**All Notifications**

Download Forms / Attachments

Process

Archived

# Admin Process Notifications



- See history of a notification
- See when a process started and when it is completed

**Notifications** ×

**Completed** 11/04/2022, 11:08 AM

**Download Forms/Attachments**  
Your printed Applications Forms are ready. Click on this link to download. [Download](#)

**In Progress** 11/04/2022, 11:07 AM

**Download Forms/Attachments**  
Preparing your Applications Downloads.

[Close](#)

- Admins can enable or disable either Email or In-App notifications in their personal account settings
- This will help to lessen unwanted emails for things like downloads

**Preferred Communication \***  
*Select At Least One\**

Enable Notifications for Admin Processes

Enable Emails/Texts for Admin Processes

[Save Changes](#)





# Supported Notifications

- **1.10 notifications**
  - Download Forms/Attachments
  - Rollover Process
  - Migration Import
- **Future**
  - The notification architecture is in place so any new feature can leverage it as well as add new categories as needed.
  - Note: the Admin Process Notifications is the first step in a broader Workflows feature we are continuing work on now.



Feature Highlight

# Place Multiples Together



# Place Multiples Together



Lottery Settings: 2022-2023 Chad Smith

### Waiting List

Define a rule for which students are multiples and will be placed together.

### General

- Place Multiples Together  
*Same parent account & grade level required.*
- Same Address
- Twin Setting (same birthday  $\pm 1$  day)

**Toledito One**  
Student ID: 1761608

SIS Student ID

Application to:

**QAA Parent Apply Flow Program - Active**

**Multiples**

[1761609: Toledito Two](#)

See which students are multiples.  
Students will be placed together when the lottery is run.





Feature Highlight

# Scheduling Enhancements



# Scheduling Enhancements - Book When Submitted



- Session RSVP's are unbooked until application is submitted.
- This will prevent invalid seats from being reserved for sessions.

**Application: 2022-2023**

|                         |   |
|-------------------------|---|
| 1. Student Information  | ✓ |
| 2. Guardian Information | ✓ |
| 3. School Selection     | ✓ |
| 4. Rank Choices         | ✓ |

**Events** 7/10

Events

|            |  |
|------------|--|
| Logarithms | <i>Chosen session would be booked once form is submitted<br/>10/31/2022 12:00 AM</i> |
|------------|--|



# Scheduling Enhancements - Capacity Warning



- Admins will be warned when the sessions have the potential for being full.
- This gives admins the information to increase sessions or capacity so that all applications can be submitted.

## Manage Events

Event Name

Potential RSVPs are greater than the current seating capacity.

⚠ Meeting with the director

## Scheduling

[Back to Manage Events](#)

### RSVP Tracker: Meeting with the director

⚠ Potential RSVPs are greater than the current seating capacity. There are (1) un-submitted RSVPs and only (0) seats available across all sessions.

| Session                       | Locations & Details | RSVPs | Capacity | Available | Fill %      | Attended | Attendance % | RSVP LIST              |
|-------------------------------|---------------------|-------|----------|-----------|-------------|----------|--------------|------------------------|
| 10/29/2022 04:35PM - 04:24... |                     | 1     | 0        | -1        | Infinity... | -        | -            | <a href="#">Manage</a> |



# Scheduling Enhancements - Application and Registration Filtering



- Event RSVPs can be searched/filtered on the Applications and Registrations pages.
- Use the Bulk Email Action to send emails to parents related to specific events!

The screenshot displays a web application interface for filtering Event RSVPs. The interface includes several filter sections:

- Withdrawn:** A checkbox for "Withdrawn" (unchecked) and a checked checkbox for "Not Withdrawn".
- Lotteries:** Two dropdown menus labeled "Lottery List" and "Lottery Status".
- Program:** A dropdown menu.
- Priority:** A dropdown menu.
- Recommendations:** A dropdown menu.
- Event:** A dropdown menu currently set to "Any Event".
- Event Status:** A dropdown menu currently set to "Not Submitted". This menu is highlighted with an orange box, and an orange arrow points to it from the text above.

At the bottom of the interface, there are buttons for "Reset Filters" and "Apply Filters". Below the filters, there is a "Bulk Action" dropdown, a search bar labeled "Search by Student Name", and buttons for "Add Filters" and "Save View".

**Applied Filters:** Submitted Not Withdrawn Event: Any Event Event Status: Not Submitted

1 of 1 Records Loaded / Showing 1 entries / 0 Records Selected



# Scheduling Enhancements - Email Templates



- RSVP Confirmation Email Template with setting
- RSVP Reminder Email Template with setting (number of days before session)

EN ES

Enter in a Text Message \*

Reservation confirmed: {event->name} on {start\_date\_sms} - {end\_date\_sms} for {student->fname}

23 characters remaining in your text message

Enter Email Subject Line \*

Reservation confirmed: {event->name} for {student->fname}

Paragraph

{student->fname} {student->lname}, your reservation has been confirmed for:

Event: {event->name}

Start Time: {start\_date}

End Time: {end\_date}

Location & Details: {event\_session->details}

## Meeting with the director: RSVP Settings

Options

Deadline to RSVP (# of Hours Before)

Send a confirmation email and/or text message after RSVP

Send a session reminder email and/or text message

Days Before Session: 1 at Time of Day\*: 11:00 AM





Feature Highlight

# Report Builder





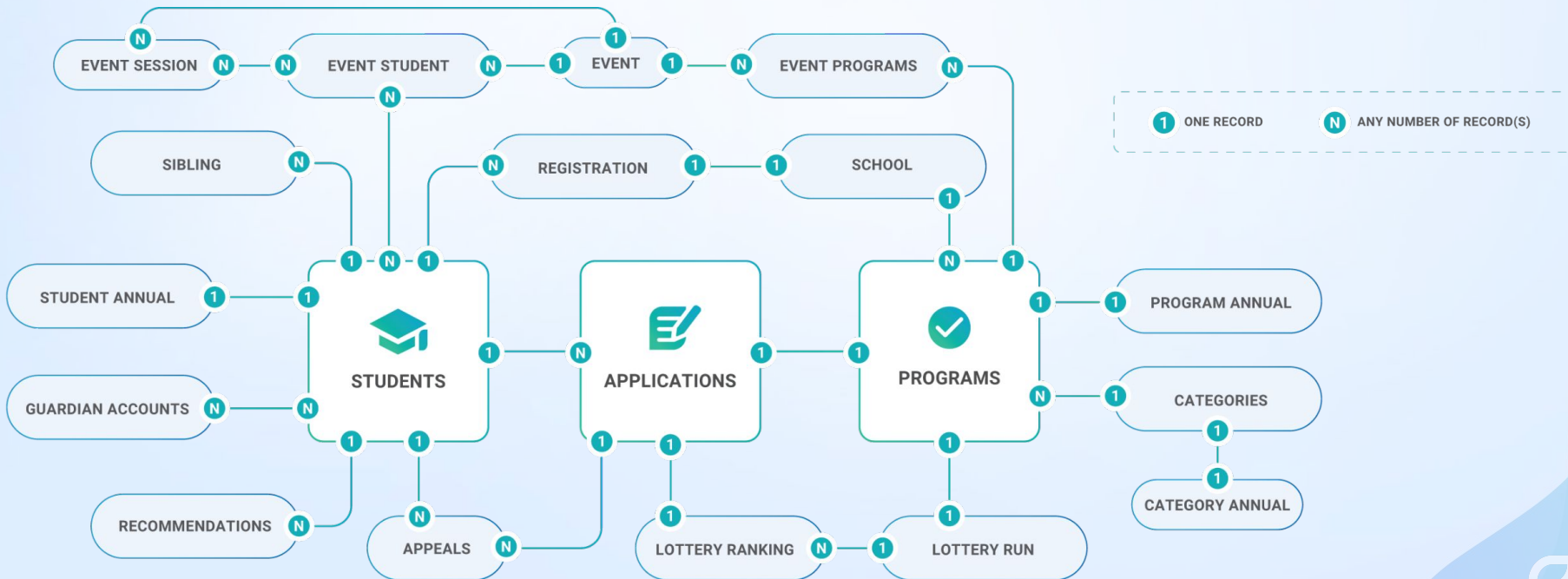
# Report Builder

- Additional Data Models
- Schedule Exports to SFTP
- Report Design like Dynamic Views
- Report Sort Order
- Report Views/Snapshots
- Report History

# Report Builder Data Models



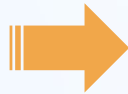
- Added Events, Program Categories, and Appeals data models
- Validation while building a report based on data model relationships



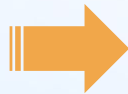
# Schedule Exports to SFTP



Requires a configured Sync SFTP Connection (easy!)



Automatically runs and exports a report to a CSV on your SFTP server



### Schedule Daily Export ✕

**Download Export as CSV**

Enable for Development Environment i

Time of Day  🕒  
Central Time

Download to SFTP  ▾

**Submit**



# Report Design like Dynamic Views



## UX Consistency

**Sort Data By:**

Select Field  
student\_annual\_grade

Ascending  Descending

**Manage Fields/Columns:** [Add Columns](#)

| Order | Data Model     | Field | Actions |
|-------|----------------|-------|---------|
| =     | Students       | fname |         |
| =     | Students       | lname |         |
| =     | Student Annual | grade |         |

**Access Settings**

Private Report (only accessible to you)

Globally Available to All Users

Share with User Groups and/or Programs

**Manage Filters:** [Add Filters](#)

| Field | Operator | Value      | Actions |
|-------|----------|------------|---------|
| grade | IS       | K, 1, 2, 3 |         |



# Report Sort Order



## Sort Data By:

Select Field

student\_annual.grade



Ascending



Descending

## Report: Student List

Report History



Export

Back to Reports

Ran On:11/06/2022 By Cindy Gould

Applied Filters: grade IN K,1,2,3

| fname  | lname    | grade level ^ | app id | program                     | program_id |
|--------|----------|---------------|--------|-----------------------------|------------|
| Kiara  | Delacruz | 1             | 70219  | RE Elvis Presley Boot Ca... | 7466       |
| Mariah | Parks    | 1             | 70244  | RE Choir Program            | 7465       |
| Ian    | Rivera   | 1             | 70225  | RE Choir Program            | 7465       |
| Sergio | Morales  | 1             | 70227  | RE Choir Program            | 7465       |









# Report Views



No need to stay on the page while report runs



Click View to see the report after it has successfully run

| Date & Time         | Last Run            | Actions   |   |   |     |      |
|---------------------|---------------------|---|---|---|-----|------|
| 07/08/2022 11:15 AM | 07/08/2022 11:15 AM |  |  |  | Run | View |
| 06/30/2022 03:36 PM | 06/30/2022 03:36 PM |  |  |  | Run | View |



# Report History



Report Action Bar: Edit, Delete, Print, **Run**, **View**

Report: Students list

Report History | Edit | Refresh | Export | Back to Reports

Ran On: 11/30/2022 By Bharathi Yadati

| First Name | Last Name  | Date of Birth | Grade | program_id | Program Name                |
|------------|------------|---------------|-------|------------|-----------------------------|
| Aaron      | Holland    | 2014-04-22    | 2     | 7465       | RE Voc Choir Program        |
| Adriana    | Boone      | 2014-05-16    | 2     | 7466       | RE Ins Elvis Presley Boo... |
| Adriana    | Cunningham | 2011-01-28    | 5     | 7465       | RE Voc Choir Program        |
| Adrienne   | Mata       | 2010-09-26    | 6     | 7475       | RE Voc Music Boot Camp      |

Click Report History to see a list of snapshots of report

# Report History



Save up to 20 snapshots per report per user

## Report History

### Test Renzo

Up to 20 snapshots available.

Bulk Action

Delete Report Snapshot

Export Report Snapshot

Private Report

Private Report

Created By

Renzo Arecco

Renzo Arecco

Renzo Arecco

Ran On

2022-11-09 10:16:57

2022-10-25 10:43:49

2022-10-24 09:17:10

Actions

View

View

View

Back to Report

Delete snapshots to choose which ones to keep

Bulk export snapshots to a zip file



## Points to Note:

- Snapshots will be saved to a user's Report History only if that user has run the report (even if it is a global report).
- Data in the Snapshots may vary among users based on their user permissions.

SchoolMintEnroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Reports: 2022-2023

Manage Report Categories Add New Report

Other Reports

Search

| ★ | Report Name          | Access                       | Created By      | Created At          | Last Run       | Actions       |
|---|----------------------|------------------------------|-----------------|---------------------|----------------|---------------|
| ☆ | All students         | Private Report               | Bharathi Yadati | 09/16/2022 04:52 PM |                | ✎ 🗑️ Run View |
| ☆ | Cutoff numbers       | Globally Available to All... | Bharathi Yadati | 11/04/2022 12:39 PM | 11/29/2022 06: | ✎ 🗑️ Run View |
| ☆ | guardian report      | Globally Available to All... | Bharathi Y      | 11/03/2022 04:26 PM |                | ✎ 🗑️ Run View |
| ☆ | Report of all fields | Globally Available to All... | Bharathi Yadati | 06/13/2022 01:07 PM |                | ✎ 🗑️ Run View |
| ☆ | RSVP Numbers         | Private Report               | Bharathi Yadati | 11/29/2022 11:55 AM | 11/29/2022 01: | ✎ 🗑️ Run View |
| ☆ | RSVP with students   | Private Report               | Bharathi Yadati | 11/29/2022 01:45 PM |                | ✎ 🗑️ Run View |
| ☆ | RSVPs Report         | Globally Available to All... | Bharathi Yadati | 11/29/2022 11:31 AM | 11/29/2022 11: | ✎ 🗑️ Run View |
| ☆ | Students list        | Globally Available to All... | Bharathi Yadati | 09/16/2022 03:57 PM |                | ✎ 🗑️ Run View |





Feature Highlight

# Partial Sync





# Partial Sync

- API Contacts (one-to-many in SIS)
- Today if one contact record fails to sync, the entire student record sync fails
- In v1.10, the student record will sync and only the contact with an error will fail to sync
- “Partial Sync” status on Registrations page and in Sync Log

# Partial Sync



## Registrations Page

**Sync Status:**

Status








Partial Sync ✕

Succeeded

Failed

In Progress

Pending

|      | Sync Status  | Last Sync           | Actions   |
|------|--------------|---------------------|---|
| 0:55 | Partial Sync | 2022-11-02 19:44:16 |    |
|      | Partial Sync | 2022-09-26 16:13:22 |    |
|      | Partial Sync | 2022-11-01 13:52:13 |    |

The student record was synced but one or more contacts records failed.

## Sync Log

**Partial Sync** ✕

| Status | Operation                     | Sync Error   |
|--------|-------------------------------|--|
| failed | Applying Field Transformation | The indicated property does n...   |
| failed | Applying Field Transformation | Error while Syncing Contact: FirstName, LastName, and Relationship are required. |
| failed | Syncing Contact Operation     | Error while Syncing Contact: Fir...  |

Close



# Thank You!

Rock Enroll!

