

 **SchoolMint** Enroll

# Enroll 1.11 Spring Release

Lottery Settings by Program, Bulk Update Lottery Settings by Program,  
Last, First Name Field/Sort, New Sync Imports and more!

Feature Walkthrough / Product & Engineering



Targeted for February 24, 2023

# Enroll 1.11 New Features

- Lottery Settings by Program and Bulk Update
- Test Server Banners
- “Last, First” Student Name in Dynamic Views
- Student Name Search Update
- Sync Import of Cutoff Numbers
- Sync Import of Schools
- Sync Import of Programs
- Permissions for Sync Service
- PowerSchool Plugin



Feature Highlight

# Program-Specific Lottery Settings





# Program-Specific Lottery Settings & Bulk Update

- You can now manage lottery settings at the global and program level.
- When v1.11 is deployed, the settings your org has enabled/disabled at the global level will be enabled/hidden at the program level.
  - Disabled settings will also be hidden when using the bulk update option.
- If you update your program level setting, this will override what is set at the global level for that program.

**NOTE:** Your current lottery settings will still work! You do not need to make any changes unless you want to add program-specific lottery settings!

# Program Specific Lottery Settings



Admins can set lottery settings at a program level allowing for greater control over lottery settings.

East West Middle - Dual Language: Edit

PROGRAM INFORMATION PROGRAM ELIGIBILITY APPLICATION SETTINGS **LOTTERY SETTINGS**

**Primary Settings**

Priority Group: QAA TL Group

Lottery Group Design: General Lottery

Place Multiples Together  
Turn off multiples together for this program only.

**Waitlist Settings**

Rollover Waiting List  
(will rollover waiting list when school year rollover is run)

**Notification Settings**

Accepted Placement Notification: Lottery Placement Accepted - Parent Notification

Declined Placement Notification: Lottery Placement Declined - Parent Notification

[Manage Consolidated Results Notification](#)

Cancel Save Program



Elizabeth Briney 2021-2022

East West Middle - Dual Language: Edit

PROGRAM INFORMATION PROGRAM ELIGIBILITY APPLICATION SETTINGS **LOTTERY SETTINGS**

**Primary Settings**

Priority Group: QAA TL Group

Lottery Group Design: General Lottery

**Accept/Decline Placement**

Allow guardians to Accept/Decline Waiting List Placements

Allow guardians to accept/decline seats from dashboard

**Auto-Denial Published Offer**

Auto-decline a student's other applications on Offered Lists once a seat is accepted

Global Lottery Settings  Custom  Off

**Auto-Denial Accepted Seat**

Global Lottery Settings  Custom  Off

**Waitlist Settings**

Auto-roll up applications from waiting list to offered list (when another application on offered list is declined)

Roll over waiting lists when the school year is rolled over

**Post Lottery**

Auto-add eligible applications to lottery list after initial lottery is run

**Notification Settings**

Accepted Placement Notification: Lottery Placement Accepted - Parent Notification

Declined Placement Notification: Lottery Placement Declined - Parent Notification

[Manage Consolidated Results Notification](#)

**General**

Place Multiples Together  
Turn off multiples together for this program only.

Always Keep Lottery Lists Grouped by Lottery Design

Cancel Save Program



# Program Specific Lottery Settings



- Lottery settings **enabled** at the global level will display the corresponding setting at the program level.
- Lottery settings **disabled** at the global level will hide the corresponding setting at the program level.

## Auto-Decline

Auto-decline a student's other applications on Offered Lists once a seat is accepted

Auto-decline **APPLICATIONS** if **OFFER** is not accepted by:

Days After Published Offer\*  and/or Date\*  at Time of Day\*

Auto-decline **APPLICATIONS** if **REGISTRATION** is not submitted by:

Global rule is disabled

## Auto-Decline Published Offer

Auto-decline a student's other applications on Offered Lists once a seat is accepted

Global Lottery Settings  Custom  Off

Auto-decline **APPLICATIONS** if **OFFER** is not accepted by:

Days After Published Offer\*  and/or Date\*  at Time of Day\*

If the "Days From Published" number extends the date past the "On This Date" setting, then the auto-decline occurs on the earlier of the two dates.

### These options affect auto-decline settings:

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

Days Before Auto-Decline\*  at Time of Day\*

Program rule is not displayed

# Program Specific Lottery Settings - Run Lottery



Lotteries & Placements Lottery Dashboard Lottery Settings

### Run Lottery

**Select Lottery Eligible Date Range**

Start Date & Time  End Date & Time   
Central Time Central Time

Sorting: Random

**Select Programs & Grades**

Search Programs  All School Levels  All Program Categories

Select Programs	Select All
Elementary	
LT-P-1904711033	✓
Puppy School	✓
Test	✓
Middle	
ABBA Academy	✓
ABBA Academy Copy	✓
East West - IB Program	✓
East West Middle - Dual Language	✓
East WestMiddle	✓
Test Year program	✓
High	
Westbrook Leadership - Dual Language	✓
Westbrook Leadership - IB Program	✓

**Multiple Lotteries**

**Merge Waitlist**

Merge new applications into existing priority groups

**Save Waiting List**

Waiting lists will be saved after cutoff is reached

**Select Grades**

All Grades

**Placement Order**

Choose Grade Order  
Place students in lower grades first

The validation for allowing admins to run a lottery will take place on the Run Lottery page.

This allows us to check the selected program(s) against the auto-decline date(s). If the auto-decline date for a program is in the past, they will see an alert.

Program auto-decline date has passed

The lottery cannot be run for program(s) ABBA Academy Copy because the auto-decline date(s) have passed. Modify the auto-decline dates in Lottery Settings.



Feature Highlight

# Bulk Update Programs - Lottery Settings



# Bulk Update Programs - Lottery Settings



Lottery settings can be changed by clicking “Change Settings” to open a section.

The sections with changes must be open when you click “Update Programs” otherwise those changes will not be saved.

Poboy Academy | Programs: 2021-2022

Insights ✓ Renzo Arecco 2021-2022

SchoolMintEnroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Schools Programs > Programs

## Manage Schools & Programs: 2021-2022

General

Schools/Programs

Date & Time

Manage Users

Manage Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

### Programs

Manage the programs available for applications to be filled out.

17 of 17 programs loaded

Hide Disabled Programs

Bulk Actions Search Programs All School Levels All Program Categories

ID	ABBR	Program Name	Category	Enabled	Accepting Grades	Actions	
<input checked="" type="checkbox"/>	5210	AA	ABBA Academy	Choice Scho...	Y	1, 2, 3, 4, 5, ...	<a href="#">Disable</a>
<input checked="" type="checkbox"/>	14731	AA	ABBA Academy C...	Choice Scho...	Y	1, 2, 3, 4, 5, ...	<a href="#">Disable</a>
<input type="checkbox"/>	14732	AA	ABBA Academy C...	Choice Scho...	N	1, 2, 3, 4, 5, ...	<a href="#">Enable</a>
<input type="checkbox"/>	5021	E...	East West - IB Pro...	Choice Scho...	Y	6, 7, 8	<a href="#">Disable</a>
<input type="checkbox"/>	5022	E...	East West Middle ...	Choice Scho...	Y	5, 6, 7	<a href="#">Disable</a>

This is a development environment for internal use only.

PR: development (02/14/2023, 10:43 AM)  
BR: development (02/14/2023, 7:11 PM)  
DB: development (02/14/2023, 10:43 AM)



Feature Highlight

# Test Server Banners



# Test Server Banners



Test Servers now have banners to differentiate them from production!


A screenshot of the SchoolMint Enroll Admins login page. The page has a dark blue header on the left with the SchoolMint Enroll logo and tagline. The main content area is white and contains the title 'Admins', a login instruction, input fields for email and password, a 'Log In' button, a 'Forgot password?' link, an 'Or' separator, and a 'Sign in with Google' button. An orange banner at the bottom of the page reads 'This is a staging environment for internal use only.'

**SchoolMint**Enroll  
K12 Experts in Strategic Enrollment Management

## Admins

Log In with your email and password to continue


Email \*


Password \* 

Log In

[Forgot password?](#)

— Or —

 Sign in with Google

 This is a **staging** environment for internal use only.

 This is a **staging** environment for internal use only.



Feature Highlight


# “Last, First” Student Name Available with Dynamic Views





# Last, First Student Name Format

- Add the new field “last\_first\_full\_name” to a dynamic view and sort by that column to sort the list by student last name

<input type="checkbox"/>		App#	Student Name ▲	Rank	Ca
<input type="checkbox"/>		70523	Aguilar, Amy	1	Summ
<input type="checkbox"/>		70597	Aguilar, Gary	1	Annu
<input type="checkbox"/>		70586	Alexander, Yolan...	1	Annu
<input type="checkbox"/>		70320	Allen, Dalton	1	Annu

# Last, First Dynamic View Setup Example



Add the new Student Name column to your view.

1. Select the Student record.
2. Select the “last\_first\_full\_name” field.
3. Add a field label such as “Student Name”.
4. Save the field.

## Add or Edit Field

Use the menus below to select a field to display in this view.

Select Record \*

Student

Select Process \*

Show All Fields

Select Field \*

last\_first\_full\_name

How would you like this field labeled?

Field Label \*

Student Name

Cancel

Save Field



# Last, First Dynamic View Setup Example



1. Reorder the columns by dragging the new “last\_first\_full\_name” field to an appropriate location.
2. Delete the original “full\_name” field.

## Customize Columns:

Order	Column Label	Field
=	App#	id
=	Student Name	last_first_full_name
=	Rank	choice_rank



# Last, First Dynamic View Setup Example



You can now sort your data by this new field!

## Sort Data By:

Select Field

Student Name (last\_first\_full\_name)



Ascending



Descending





# Last, First Student Name Tips

- Export button on the dynamic view page will output with the last, first field!
- The last, first field is not available in other places yet in the application.
- We plan to build out this functionality in the future to allow for more use of the last, first name format throughout the system.



Feature Highlight

# Student Name Search Update

(In Testing, Will Release ASAP)





# Student Name Search

- On the Applications and Registrations pages, the student search bar was causing confusion and issues with unintended behavior so we decided to remove it right away.
- We have redesigned this area for a much better experience and will be releasing it asap!

Search by Student Name or Student ID



Student Applications: 2022-2023

2	2	2
TOTAL STUDENTS	TOTAL APPLICATIONS	SUBMITTED APPLICATIONS

Search by Student Name or ID   Apply Saved View

Quick Filters

Bulk Actions  2 / 2 Selected Applied Filters: Submitted Not Withdrawn Student Name or Student ID: adrienne

<input checked="" type="checkbox"/>	App#	Full Name	Rank	Category	Program	Grade	Sib	Priority	Recommendation	Actions
<input checked="" type="checkbox"/>	70606	Adrienne Lam	1	Annual CoursesRE Voc Acapell...		10		1		<input type="button" value="person"/> <input type="button" value="pencil"/> <input type="button" value="trash"/>
<input checked="" type="checkbox"/>	70453	Adrienne Mata	1	Summer Cour... RE Voc Music ...		6		1		<input type="button" value="person"/> <input type="button" value="pencil"/> <input type="button" value="trash"/>



Feature Highlight

# Bulk Imports





# Bulk Imports

- Sync Service tool is extended to many other bulk imports:
  - Cutoff Numbers
  - Schools
  - Programs
- New user permission “Sync Service Limited Access” to allow importing of only certain data
- PowerSchool Plugin in the connections set up area



## Sync Page

- Import Student Mapping
- Export Student Mapping
- Import Application Mapping
- Import School Mapping
- Import Cutoff Mapping
- Import Program Mapping

All Connections

## New User Permission

### Settings

- Schools / Programs
- Lottery
- General
- Manage Forms
- Content & Letters
- Custom Data
- Roll Over
- Manage Theme
- Sync Service Full Access
- Sync Service Limited Access





Feature Highlight

# Import Cutoff Numbers





## Recommended Import Flow

1. Export cutoff numbers from the Manage Lottery Cutoff Numbers page.
2. Make edits to the “Original Cutoff Numbers” column.
3. Use this CSV file to map in Sync.
4. Import the Cutoff numbers.



# Export & Import Cutoff Numbers



## Export Cutoff Numbers

### Lottery Cutoff Numbers

Cancel

Save Cutoff Numbers

Export Cutoff Numbers

Tell us how many seats you would like to fill in the lottery.

Select One or More Programs

School Level

Program Categories

Apply Filters

Program ID	Program Name	Grade	Original Cutoff	Lottery Group	Lottery Group ID	Lottery Sub Group	Lottery Sub Group ID
7468	RE Voc Musical Theater Fall	6	4		0		0
7468	RE Voc Musical Theater Fall	7	5		0		0
7468	RE Voc Musical Theater Fall	8	5		0		0
7468	RE Voc Musical Theater Fall	9	5		0		0
7468	RE Voc Musical Theater Fall	10	15		0		0

# Export & Import Cutoff Numbers



## Import Cutoff Numbers

### To SchoolMint Enroll Field

settings\_annual.cutoff\_number

settings\_annual.program\_id

settings\_annual.program\_name

settings\_annual.lottery\_group\_id

settings\_annual.lottery\_sub\_group\_id

settings\_annual.grade

### Import Cutoff Mapping

CONFIGURE

FIELD MAPPING

Save

#### Configure your Connection

1 Please ignore the upload option below if you want to continue with the last uploaded file: *export\_cutoff\_numbers\_lists - Grou...*

Upload CSV File

Program Unique ID Field \*

Program ID

Lottery Group Unique ID Field \*

Lottery Group ID

Lottery Sub Group Unique ID Field \*

Lottery Sub Group ID

Grade Field \*

Grade

#### Cutoff Numbers Examples

Program ID - 1 7476	Lottery Group ID - 1 215	Lottery Sub Group ID - 1 212	Grade - 1 6
Program ID - 2	Lottery Group ID - 2	Lottery Sub Group ID - 2	Grade - 2
Program ID - 3	Lottery Group ID - 3	Lottery Sub Group ID - 3	Grade - 3
Program ID - 4	Lottery Group ID - 4	Lottery Sub Group ID - 4	Grade - 4
Program ID - 5	Lottery Group ID - 5	Lottery Sub Group ID - 5	Grade - 5

# Export & Import Cutoff Numbers



## Notes about Lottery Groups

- When Lottery Groups are **disabled**, the cutoff numbers are **stored by program** and grade level.
- When Lottery Groups are **enabled**, the cutoff numbers are **stored by lottery group** at program and grade level.
- If you import cutoff numbers and then enable or disable Lottery Groups after the import, you will need to re-import the cutoff numbers.
- The fields “lottery\_group\_id” and “lottery\_sub\_group\_id” are required fields in the import file and mapping for Sync to import cutoff numbers.
- If Lottery Groups are **disabled**, Sync ignores the values in “lottery\_group\_id” and “lottery\_sub\_group\_id” columns in the import file and imports 0 values into Enroll.
- If Lottery Groups are **enabled**, Sync matches the values of “lottery\_group\_id” and “lottery\_sub\_group\_id” with these fields in Enroll and imports cutoff numbers into those groups and subgroups.





Feature Highlight

# Import Schools





## Recommended Import Flow

1. School Groups and School Levels should already exist in Enroll.
2. Create a report with the school fields and export that report.
3. Add “school\_group\_name” and “school\_level\_name” columns to the CSV export.  
*Note: These fields are not currently available in Report Builder.*
4. “school\_id” is required only to update existing schools.
5. To add new schools, use any unique identifier (e.g., school code).
6. Use this CSV file to map in Sync.
7. Import the schools.

**Note:** Schools can also be imported using an API (PowerSchool, Skyward, or Aeries).







Feature Highlight

# Import Programs

(In Testing – Will Release ASAP)





## Recommended Import Flow

1. Schools and Program Categories should already exist in Enroll.
2. Create a report with the Program fields and export that report.
3. “program\_id” is required only to update existing programs.
4. To add new programs, use unique identifier school + grade level + program abbreviation.
5. Use this CSV file to map in Sync.
6. Import the programs.

NOTE: This feature is still in testing as of February 24th. We will release this feature separately as soon as it is ready and update the release notes and topic in the Enroll User Guide!



# Import Programs



## Configure Program Import

### Import Program Mapping

CONFIGURE

FIELD MAPPING

Save

#### Configure your Connection

**i** Please ignore the upload option below if you want to continue with the last uploaded file: *export\_cutoff\_numbers\_lists -...*

Upload CSV File

Program Unique ID Field \*

program\_id

Program Name Field \*

title

#### Program Examples

Program ID - 1

7472

Program ID - 2

Program ID - 3

Program ID - 4

Program ID - 5

## Fields Available for Import

programs.id

programs.title

programs.abbreviation

programs.school\_code

programs.category\_name

program\_annual.emailto

program\_annual.enabled

program\_annual.open\_date

program\_annual.close\_date

program\_annual.acceptgrades

# Validations to import App, Reg or Re-reg dates



Sync has validation to determine if the App, Reg or Re-reg open and close dates are “System Default” or “Program/School Specific”. See the tables below for the validation logic.

## Creating a New School

	CSV Has dates	CSV Doesn't have dates (blank cells)
Open & Close Date fields are Mapped & Overwrite checked	Adds the value	System default gets selected
Open & Close Date fields are Mapped & Overwrite un-checked	Adds the value	System default gets selected
Open & Close Date fields are Un-mapped & Overwrite checked	System default gets selected	System default gets selected
Open & Close Date fields are Un-mapped & Overwrite un-checked	System default gets selected	System default gets selected

## Updating an Existing School

	CSV Has dates	CSV Doesn't have dates (blank cells)
Open & Close Date fields are Mapped & Overwrite checked	Adds the value	System default gets selected
Open & Close Date fields are Mapped & Overwrite un-checked	Adds the value	Leaves the existing dates untouched
Open & Close Date fields are Un-mapped & Overwrite checked	Can't turn on Overwrite for Unmapped fields hence leaves the existing dates untouched	Can't turn on Overwrite for Unmapped fields hence leaves the existing dates untouched
Open & Close Date fields are Un-mapped & Overwrite unchecked	Leaves the existing dates untouched	Leaves the existing dates untouched





Feature Highlight

# Permissions for Sync Service





## Sync Service Full Access

- Users with this permission will have access to all of the import types irrespective of their access to a specific module.
- By default, anyone with Sync access will have this permission.



# Permissions for Sync Service



## Sync Service Limited Access

- Users with this permission will have access to only a few import types based on their access to a specific module.
- The following table gives the combination of permissions required for each type of import:

<b>Import Schools</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Schools/Programs
<b>Import Programs</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Schools/Programs
<b>Import Cutoff Numbers</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Lottery & Lottery - Manage Cutoff Numbers
<b>Import Students</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Students - Edit Students
<b>Export Students</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Students - Edit Students
<b>Import Applications</b>	Settings - Sync Service Full Access OR Settings - Sync Service Limited Access & Applications - Edit Applications





Feature Highlight

# PowerSchool Plugin





SchoolMint Plugin for PowerSchool  
is displayed during the Sync  
Connection setup



### Sync Connection

Configure a sync connection to import student or application data into SchoolMint Enroll, or to export registrations from SchoolMint Enroll.


Set Up Sandbox Sync  Set Up Production Sync

Name \*  
PowerSchool

Select Connection Type \*  
PowerSchool X ▾

#### SchoolMint Plugin for PowerSchool

Download and install the SchoolMint plugin for PowerSchool to get the Client ID and Client Secret needed for PowerSchool integration. [See Guide.](#)


 Download the SchoolMint Plugin for PowerSchool

#### Sandbox

This is the connection information for where your sandbox instance of SchoolMint Enroll should sync.

URL \*

Client ID \*

Client Secret \* 

Connect



# Thank You!

