



Say Hello To Enroll 2.0

Release Overview

August 1, 2023



WELCOME!



**Emily Carlson,
Product**



**Jennifer Hurst,
Customer Experience**



**Alexis Robin
Customer Experience**

Chad Smith and Bharathi Yadati: Product Q&A



Logistics

- Slides, recording and related resources will be shared in the follow up email tomorrow
- Live Q&A at the end of today's presentation
 - Ask questions throughout by clicking **Q&A**
 - Send site-specific questions to *support@schoolmint.com*



In-platform Resources

WalkMe

The screenshot shows a WalkMe help overlay with a dark header and a light body. The header contains the text "How can we help you?" and a close button. Below the header are three tabs: "Help", "Onboarding", and "Internal Help". A search bar with a magnifying glass icon and the placeholder text "Type in your question..." is positioned below the tabs. A list of help topics is displayed, each with a speech bubble icon and a title. A vertical sidebar on the right side of the overlay contains the text "Need Help?" and a back arrow icon.

ies

How can we help you?

Help Onboarding Internal Help

Type in your question...

- Enroll v2.0 Webinar
Join us for a webinar introducing Enroll v2.0.
- New for Enroll 2.0: Boundaries > Boundary List
- New for Enroll 2.0: Boundaries > Map View
- New for Enroll 2.0: Program Description

Enroll Help Desk

Need Help?

Enroll User Guide

The screenshot shows the Enroll User Guide interface. On the left is a navigation sidebar with a dark header "Enroll User Guide" and a light body containing "Space Settings", "APPS", "Google Drive", and "Content". The "Content" section is expanded to show a list of release notes, with "Enroll Product Releas..." selected and highlighted. On the right is the main content area with a dark header "Enroll User Guide" and a light body. The main content area features a large banner with the SchoolMint logo and the text "Enroll User Guide". Below the banner is a light blue box containing a welcome message and a search bar.

Enroll User Guide

Enroll User Guide

Space Settings

APPS

Google Drive

Content

- Enroll Product Releas...
 - Release 2.0 - July...
 - Release 1.12.0 - A...
 - Release 1.11.1 - M...
 - Release 1.11 - Feb...
 - Release 1.10 - De...
 - Release 1.9 - Sept...
 - Release 1.8 - Sept...

Welcome to the new online Enroll User Guide for Admins! The Enroll Product Team is excited to see you. As you explore the new features in Enroll, you will find release notes and topics covering each new feature here in the User Guide.

Use the navigation on the left or the search field below to find the content you need. In addition to the release notes, you will find helpful examples, and more!

This User Guide is currently in version 1.0. We will continue to add more content over time so stay tuned for updates.

NOTE: The Enroll User Guide is intended only for administrators using SchoolMint Enroll. Please do not share this content with students or parents.

Search for an article



Agenda

Redesigned

- Merge Students

New

- Boundary Management
- Seat Tracker
- School/Program Descriptions
- Grades Open For Applications
- SchoolFinder

Q&A



Merge Students

Merge Student Records

Cancel

There is conflicting data between the students being merged.



To eliminate the conflict(s):

1. Select "Use as Source Student" for one of the students listed.
2. Review values and change selections as needed.

Student ID: 1747970

Name: Alison Branch

Birthdate: 10/24/2009

Grade: 7

Guardian(s)

No associated guardian accounts

Use as Source Student

Student ID: 1747862

Name: Alison Branch

Birthdate: 10/24/2009

Grade: 7

Guardian(s)

1500921: Maria Riché

Use as Source Student

source student (select at least one).

All Guardians For This Student

All Guardians For This Student

No guardian to be selected

Maria Riché

Manage Students: 2022-2023

Search by Student Name or Student ID



Search

Bulk Actions



2 / 2 Selected

Send Email/Text Message

Merge Students

Full Name



Parent

Alison Branch

Maria Riché

1747970

Alison Branch

Enroll User Guide

- Merge Students



Seat Tracker

Enroll User Guide

- [Seat Tracker](#)

The screenshot displays the 'Seat Tracker' interface. At the top, it shows 'Report: 2023-2024', the user 'Emily Carlson', and the year '2023-2024'. A 'Save Seat Tracker' button is in the top right. The main title 'Seat Tracker' is followed by a description: 'Displays seat availability by grade level using capacity, cutoffs, and calculated results from data in Enroll.' Below this are 'Guardian View' and 'Export' buttons. A filter section includes dropdowns for 'School(s)', 'Program(s)' (with 'Birch ES Ope...' selected), 'School Level(s)', and 'Program Category(s)', along with an 'Apply Filters' button. The data section is titled 'Birch Elementary School' and 'Birch ES Open Enrollment - Open Enrollment Programs'. It contains a table with columns for Grade, Capacity, Returning Students, Lottery Seats Filled, Seats Available, and Lottery Cutoff.

Grade	Capacity <i>i</i>	Returning Students <i>i</i>	Lottery Seats Filled <i>i</i>	Seats Available <i>i</i>	<u>Lottery Cutoff</u> <i>i</i>
K	0	0	0	0	0
1	0	0	0	0	0
2	65	28	4	33	15
3	0	0	0	0	0



Seat Tracker

Reports: 2021-2022

Seat Tracker is located in the Reports area

Other Reports

Seat Tracker

To manage Seat Tracker numbers click Seat Tracker.

East West Middle

East West Middle - Dual Language - Choice Schools

Grade	Capacity i	Returning Students i	Lottery Seats Filled i	Seats Available i	<u>Lottery Cutoff</u> i
5	2	0	0	2	1
6	2	2	1	-1	3
7	1	0	0	1	4
Total	5	2	1	2	8

East West Middle

East West Middle - Neighborhood Schools

Grade	Capacity i	Returning Students i	Lottery Seats Filled i	Seats Available i	<u>Lottery Cutoff</u> i
5	1	0	0	1	6
6	1	0	0	1	5
7	1	0	0	1	4
8	2	0	0	2	6
Total	5	0	0	5	21

Seat Tracker

How is the “Seats Available” number determined?

- Capacity
- MINUS Returning Students
- MINUS Lottery Seats Filled
- EQUALS Seats Available

Lottery Cutoff is displayed as a reference if you want to adjust the cutoff number.

Click the “Lottery Cutoff” column header to be taken to the Lottery Cutoff page.

East West Middle

East West - IB Program - Choice Schools

Grade	Capacity ⓘ	Returning Students ⓘ	Lottery Seats Filled ⓘ	Seats Available ⓘ	<u>Lottery Cutoff</u> ⓘ
6	8	3	3	2	3
7	10	2	2	6	2
8	4	1	2	1	2
Total	22	6	7	9	7

East West Middle

East West Middle - Dual Language - Choice Schools

Grade	Capacity ⓘ	Returning Students ⓘ	Lottery Seats Filled ⓘ	Seats Available ⓘ	<u>Lottery Cutoff</u> ⓘ
5	2	0	0	2	1
6	2	2	1	-1	3
7	1	0	0	1	4
Total	5	2	1	2	8

Seat Tracker

Seat Tracker

Displays seat availability by grade level using capacity, cutoffs, and calculated results from data in Enroll.

Save Seat Tracker

Guardian View

Export

School(s)

(s)

Program Categori...

Choice Scho... x

Apply Filters

Manually enter capacity and returning student numbers and click "Save Seat Tracker".

ABBA Academy

ABBA Academy - Choice Schools

Grade	Capacity <i>i</i>	Returning Students <i>i</i>	Lottery Seats Filled <i>i</i>	Seats Available <i>i</i>	<u>Lottery Cutoff</u> <i>i</i>
6	<input type="text" value="1"/>	<input type="text" value="0"/>	0	1	0
7	<input type="text" value="1"/>	<input type="text" value="0"/>	0	1	0
8	<input type="text" value="1"/>	<input type="text" value="0"/>	0	1	0
Total	3	0	0	3	0

Seat Tracker - Export

Seat Tracker

Displays seat availability by grade level using capacity, cutoffs, and calculated results from data in Enroll.

Save Seat Tracker

Guardian View

Export

Export your Seat Tracker data using the Export button at the top of the Seat Tracker.

School(s)

Program(s)

ABBA Academy

ABBA Academy - Choice Schools

Grade	Capacity i	Returning St
6	1	0
7	1	0
8	1	0

seats_tracker_2023-06-16 14_51_19

School Level	School Name	Program Category	Program Name	Grade	Capacity	Returning Students	Lottery Seats Filled	Seats Available	Lottery Cutoff
Middle School	ABBA Academy	Choice Schools	ABBA Academy	6	1	1	0	1	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy	7	1	1	0	1	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy	8	1	1	0	1	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Arts	6	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Arts	7	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Arts	8	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	1	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	2	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	3	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	4	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	5	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	6	0	0	0	0	0
Middle School	ABBA Academy	Choice Schools	ABBA Academy Copy	7	0	0	0	0	0
Middle School	East West Middle	Choice Schools	East West - IB Program	6	8	8	3	8	3
Middle School	East West Middle	Choice Schools	East West - IB Program	7	10	10	2	10	2
Middle School	East West Middle	Choice Schools	East West - IB Program	8	4	4	2	4	2
Middle School	East West Middle	Choice Schools	East West Middle - Dual Language	5	2	2	0	2	1
Middle School	East West Middle	Choice Schools	East West Middle - Dual Language	6	2	2	1	2	3
Middle School	East West Middle	Choice Schools	East West Middle - Dual Language	7	1	1	0	1	4
High School	North South High	Choice Schools	Westbrook Leadership - Dual Language	9	30	30	0	30	1

Seat Tracker - Manage Guardian View

3 Options to Manage Guardian View

Seat Availability Settings

Guardian View

Hide seat availability

Display actual number of seats available

Display seat availability as a range

Cancel Save Open Seat Settings

Hide Seat Availability

No seat availability information will be displayed to guardians.

Seat Availability Settings

Guardian View

Hide seat availability

Display actual number of seats available

When there are or less open seats, show as: ● # Seats Available

When there are or less open seats, show as: ● # Seats Available

Any Open Seats number higher than the number set above will show as: ● # Seats Available

Display seat availability as a range

Cancel Save Open Seat Settings

Display Actual Number

Actual seats available will be displayed for guardians for the program and grade to which they are applying.

Seat Availability Settings

Guardian View

Hide seat availability

Display actual number of seats available

Display seat availability as a range

When there are or less open seats, show as: ● No Seats Available

When there are or less open seats, show as: ● Limited Seats Available

Any Open Seats number higher than the number set above will show as: ● Seats Available

Cancel Save Open Seat Settings

Display a Range

A range of seat availability is displayed for guardians for the program and grade to which they are applying.

Seat Tracker - Manage Guardian View (Individual Program)

Guardian View

Configure how guardians will see Seat Availability for the program(s) they are applying to by clicking the Guardian View button in Seat Tracker.

Programs can be configured individually using the "Seat Availability: Guardian View" button on the Program Information tab.

East WestMiddle: Edit

Cancel Save Program

PROGRAM INFOR... PROGRAM ELIGIBI... APPLICATION SETT... LOTTERY SETTINGS SCHOOLFINDER

School*
East West Middle

Notification Email

Program Name*
East WestMiddle

Program Abbreviation
EW

Program Category*
Neighborhood Schools

Program Enabled

Seat Tracker Settings

Seat Availability: Guardian View

Seat Availability Settings

Guardian View

Hide seat availability

Display actual number of seats available

Display seat availability as a range

When there are or less open seats, show as: No Seats Available

When there are or less open seats, show as: Limited Seats Available

Any Open Seats number higher than the number set above will show as: Seats Available

Cancel Save Open Seat Settings

Seat Tracker - Manage Guardian View (Bulk Actions)

Guardian View

i To specify how seat availability is displayed for guardians, select one of the following options (Edit permissions are required):

- Edit an individual program, then click "Seat Availability: Guardian View".
- Select programs, then choose "Set Seat Availability: Guardian View" from the Bulk Actions menu.

Programs

Manage all program information and settings.

Add New Program

Set the guardian view for multiple programs at once by using the bulk actions dropdown on the Manage Programs page.

Seat Availability Settings

Guardian View

- Hide seat availability
- Display actual number of seats available
- Display seat availability as a range

When there are or less open seats, show as: No Seats Available

When there are or less open seats, show as: Limited Seats Available

Any Open Seats number higher than the number set above will show as: Seats Available

Cancel

Save Open Seat Settings

Bulk Actions

Set Application Form

Set Eligibility Rules/Restrictions

Set Lottery Settings

Set Finder Settings

Set Seat Availability: Guardian View

Seat Tracker - Examples of Each Guardian View

Choice Schools

East West - IB Program

● *6 Seats Available*

East West International Baccalaureate allows students to thrive and grow through a challenging curriculum. Students can expect:

- High quality programmes of education, which support development of knowledgeable and inquiring students
- A worldwide network of highly respected IB World Schools, working together to share best practice.

To learn more about our program please visit our [website](#).

East West Middle - Dual Language

● *No Seats Available*

East West Dual Language - Ice on parole français!

Neighborhood Schools

East WestMiddle

East West Middle - Home of the Tigers!

Show Less ^

Display Actual Number

Display a Range

Hide Seat Availability

Seat Tracker - User Permissions

Seat Tracker

 View Seat Tracker

 Manage Seat Tracker

View Seat Tracker

- View Seat Tracker + View Reports permissions - Admin can view and export Seat Tracker data for any program(s) they have permission to access.
- View Seat Tracker + Schools/Programs permissions - Admin can view Seat Tracker data and see the Guardian View configuration for any program(s) they have permission to access.

Manage Seat Tracker

- Manage Seat Tracker + Manage Reports - Admin can manage and export Seat Tracker data for any program(s) they have permission to.
- Manage Seat Tracker + Schools/Programs - Admin can manage Seat Tracker data and Guardian View configuration for any program(s) they have permission to.

Program & School Descriptions

Content can be added to schools or programs and displayed to guardians during the enrollment process using the new content editor.

East West - IB Program: Edit

PROGRAM INFORMATION PROGRAM ELIGIBILITY APPLICATION SETTINGS LOTTERY SETTINGS SCHOOLFINDER

School*
East West Middle

Notification Email

Program Name*
East West - IB Program

Program Abbreviation
EWIP

Program Category*
Choice Schools

Program Enabled

Seat Tracker Settings

Seat Availability: Guardian View

Content Snippets & Translations

EN ES

Program information is displayed for guardians during the application process.

Paragraph **A** **B** *I* U

East West Internation Baccaluateate allows students to thrive and grow through a challenging circulum.

Students can expect:

- High quality programmes of education, which support development of knowledgeable and inquiring students
- A worldwide network of highly respected IB World Schools, working together to share best practice.

To learn more about our program please visit our [website](#).

Content Snippets & Translations

EN ES

Program information is displayed for guardians during the application process.

Paragraph **A** **B** *I* U

East West Internation Baccaluateate allows students to thrive and grow through a challenging circulum.

Students can expect:

- High quality programmes of education, which support development of knowledgeable and inquiring students
- A worldwide network of highly respected IB World Schools, working together to share best practice.

To learn more about our program please visit our [website](#).

P

55 WORDS

10 characters remaining

Program & School Descriptions - Guardian View

Content added to the school and program will be displayed during the apply flow on the program selection step.

2021-2022

Filter & Sort Map View

2 Program(s) Selected ✓

East West Middle
Address: 119 Lake Farm Road, Lafayette
Distance: 4.92 mi [See Map](#)
Grades: 6 to 8
More: East West Middle offers a wide range of opportunities for students.

- East West - IB Program
- East West Dual Language

Please visit [our website](#) to learn more.

Select Program(s) to Apply:

Choice Schools

East West - IB Program

- 0 Seats Available
- East West International Baccalaureate allows students to thrive and grow through a challenging curriculum. Students can expect:
 - High quality programmes of education, which support development of knowledgeable and inquiring students
 - A worldwide network of highly respected IB World Schools, working together to share best practice.

Content added to the school will be displayed during the enrollment flow on the school card.

2021-2022

< **Select Enrollment Type:**
2021-2022

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

Re-Register at Your Current School

East West Middle
Address: 119 Lake Farm Road, Lafayette
Grades: 6 to 8
More: East West Middle offers a wide range of opportunities for students.

- East West - IB Program
- East West Dual Language

Please visit [our website](#) to learn more.

Re-Register

Grades Open For Applications

East West - IB Program: [Edit](#) Cancel Save Program

PROGRAM INFOR... PROGRAM ELIGIBI... **APPLICATION SETT...** LOTTERY SETTINGS SCHOOLFINDER

Program Grades: ⓘ

PreK K 1 2 3 4 5 6

7 8 9 10 11 12

Application Settings:

Grades Open for Applications
6 × 7 × 8 ×

Application Form
Choice Application

Grades Open for Applications

- This setting specifies which grades are accepting applications.
- To close a grade for applications for a program, remove the grade from this field.
- This allows you to close a grade without affecting other areas on the admin side.

SchoolFinder

A Powerful Tool for Districts and Families

[Watch Video Demo](#)



Q&A



Questions and Answers

Can you customize which fields are displayed when Merging Students?

- Only values that are different between the 2 versions of the student will show up on the list for you to choose which value will persist. You do have the option of selecting a blank value (if one version of the student has a blank), but the display will default to selecting the populated value.

What happens to the applications that are not kept during the Merge Student process?

- The functionality will default to keep all applications and bring them into the destination student, except when two applications exist for the same program, then you must choose one application to keep.

What if families created more than 2 versions of a student to be merged? I've seen over 5 versions!

- From the Students page, click the Show Duplicates Only checkbox. This will identify how many versions of the same student need to be merged. First, select 2 versions of the same student using the checkboxes to left of the name, use the Bulk Action > Merge Students and proceed to identify the correct data to keep.
 - Continue this process of selecting 2 remaining versions of the same student to merge until only one remains.



Questions and Answers

Boundaries Management: Is it possible to have the map view show all applications received (like we could do in the legacy SchoolMint platform)?

- Great news - this functionality is available on the main Dashboard page. It is called Application Student Mapping. You can see the applications submitted identified by pins. Having the boundaries also display here behind the address pins is something we are considering for future releases.

Can we import values for various schools and grades to the Seat tracker or does it have to be manually input?

- Yes, you can import capacity and returning student numbers for seat tracker using sync service. This is currently available as an Ad Hoc CSV import, but by the next release it will also be available for SFTP imports.

Is the SchoolFinder tool included automatically as a part of Enroll?

- SchoolFinder is a separate, yet complimentary product with Enroll. SchoolFinder is available for an additional fee as a part of your annual contract. If you would like more information about adding SchoolFinder, please reach out to your Customer Experience Manager.



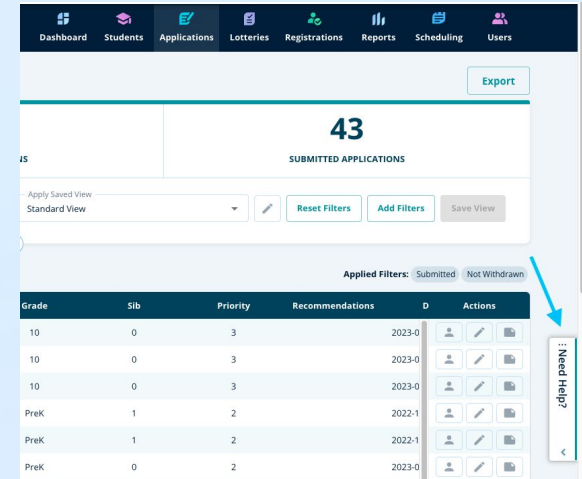
Questions and Answers

Are there plans for future features to streamline viewing lottery list data?

- In this 2.0 release, we have added the ability to configure the columns displayed when viewing your Offered and Waiting lists on the lottery placements/results page.
 - Click the Add Views button, name your view and then select Add Columns to identify the fields to see in your lottery list display. As always, please don't hesitate to reach out to Technical Support or your Customer Experience Manager to learn more!

Where do I find the WalkMe widget?

- From any screen in Enroll, you'll find the WalkMe menu in the bottom right-hand corner to click to expand.



The screenshot shows the 'SUBMITTED APPLICATIONS' page in the Enroll system. The page features a navigation bar at the top with icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. Below the navigation bar, there is a large number '43' representing the total number of submitted applications. The page includes a search bar, a dropdown menu for 'Apply Saved View' (currently set to 'Standard View'), and buttons for 'Reset Filters', 'Add Filters', and 'Save View'. Below these elements, there is a section for 'Applied Filters' with options for 'Submitted' and 'Not Withdrawn'. The main content is a table with the following columns: Grade, Sib, Priority, Recommendations, D, and Actions. The table contains six rows of data:

Grade	Sib	Priority	Recommendations	D	Actions
10	0	3		2023-0	[Icons]
10	0	3		2023-0	[Icons]
10	0	3		2023-0	[Icons]
PreK	1	2		2022-1	[Icons]
PreK	1	2		2022-1	[Icons]
PreK	0	2		2023-0	[Icons]

In the bottom right corner, there is a 'Need help?' widget with a blue arrow pointing to it from the text in the slide.

We're Here to Help!

WalkMe > Enroll Help Desk

The screenshot shows the SchoolMint Enroll Help Desk interface. At the top, there is a navigation bar with the SchoolMint Enroll logo, links for 'Our Products', 'Community', 'Get Support', and a user profile for 'Emily Carlson'. The main heading is 'Hello! How can we help?'. Below this is a search bar with a magnifying glass icon and the text 'Ask a question or search for a key word'. The interface is divided into three main support categories: 'From the Product Team', 'Admin Support', and 'Family Support'. Each category has a list of links and a 'View More' button. At the bottom, there is a dark blue section titled 'The Community' which includes three sub-sections: 'Customer Forum', 'Feature Requests', and 'Product Research', each with a brief description of its purpose.

SchoolMintEnroll Our Products Community Get Support Emily Carlson

Hello! How can we help?

Ask a question or search for a key word

From the Product Team

- Welcome!
- Releases
- What Is Enroll? An Overview

[View More](#)

Admin Support

- SchoolMint.com
- SchoolMint Status Page
- User Accounts

[View More](#)

Family Support

- Parent/Guardian Accounts
- Applications
- Emails

[View More](#)

The Community

Our community is the best place to collaborate with your peers and Schoolmint experts. Find everything from recommendations to feature ideas here!

Customer Forum

Share best practices for using SchoolMint Enroll, ask questions, and learn from others!

Feature Requests

Have an idea or a request for a new feature or enhancement? Add it here!

Product Research

Help us get input on things we're currently designing via surveys and feedback groups!

[Support](#)

Complete the Relaunch Survey!

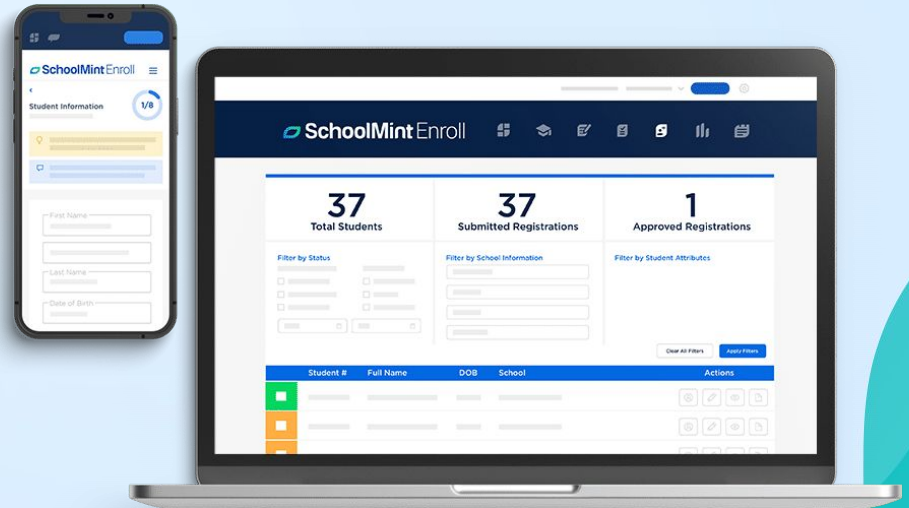
Launch dates and key information for your next
enrollment season



What's Up Next?

V2.1 Application Season

- Option to prevent parents from creating duplicate students
- Make full email content available in Message Center, even for `Text Only` families
- Export FULL search results view from applications, students, registrations
- Pre-built flags for Multiples, Non-validated Addresses
- Field Variables in Content Snippets
- Events Enhancements
- And much more!



 **SchoolMint** Enroll

Thank You!

