

 **SchoolMint** Enroll

# 1.3.2 Amazing Features

REGISTRATION TABLE, PARENT NOTES  
& SYNC SERVICE UPDATES

Feature Walk-Through / Product & Engineering





Enroll 1.3.2

# New Features

- Parent Notes
- Date Range Condition Logic
- Filter Apps by No Priority
- Bulk Offer Waitlisted Students
- Registration Table
  - Flags
  - Reporting
  - User Permissions
- Migration Script Updates
- Contact Mapping
- Bulk Export Lottery Results



# Parent/Guardian Notes

Display Application Notes to Parents



# Parent Notes

- Existing Data entry locations in the UI already exist:
  - Application List,
  - Student, Guardian.
- Enhancing Registration notes are in coming in a following release.

The screenshot displays the 'Student Applications' interface. A modal window titled 'Notes' is open, showing details for student Ainsley Finerty. The modal includes a 'Manage Note Types' button, a toggle for 'Display Note on Guardian(s) Dashboard' (currently ON), and an 'Add Guardian Note' section with a dropdown menu and a text area. The background shows a table of student applications with the following data:

App#	Full Name	Rank	Category	Program	Grade	Sib	Priority	Actions
436911	Ainsley Finerty	0	General App	Pacific Prep	1		1	2021-

# Notes now have Categories

- Save Notes To: dropdown has slightly different options now to make them specific to Applications or Registrations

ON: Display Note on Guardian(s) Dashboard

**Add Guardian Note**

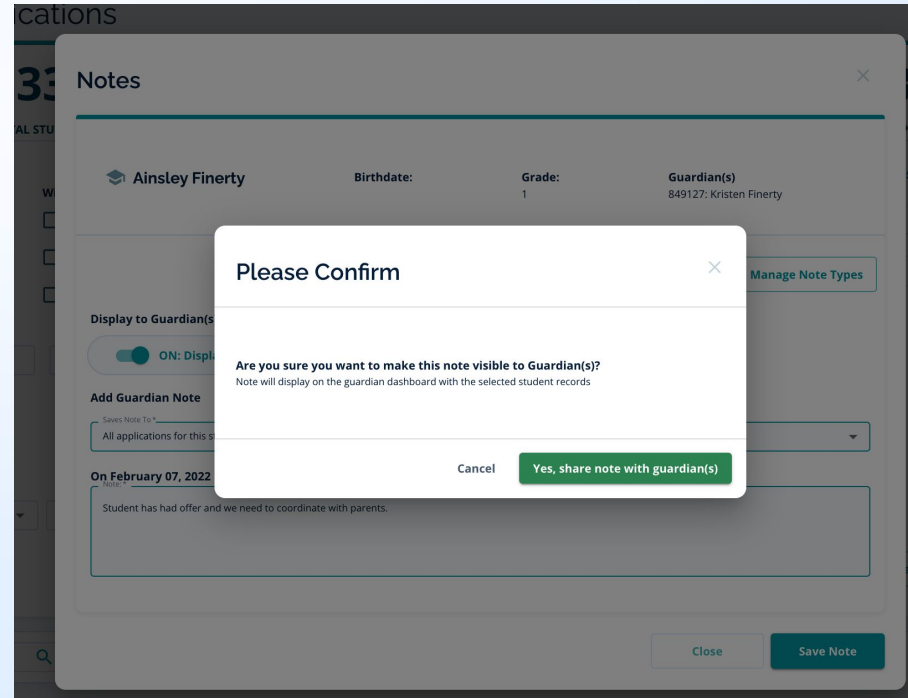
- Only this application
- All applications for this student
- All applications for all students of the same guardians

Note Type  
Genera

NOTE:

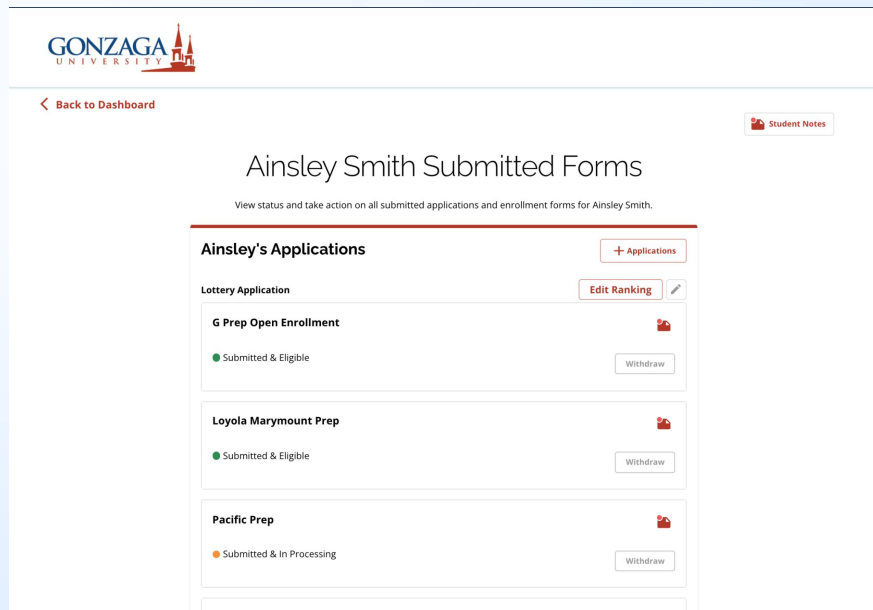
# Notes Visible to Parents

- Previously notes were not visible to parents, but now they are for application notes.



# Notes Visible to Parents

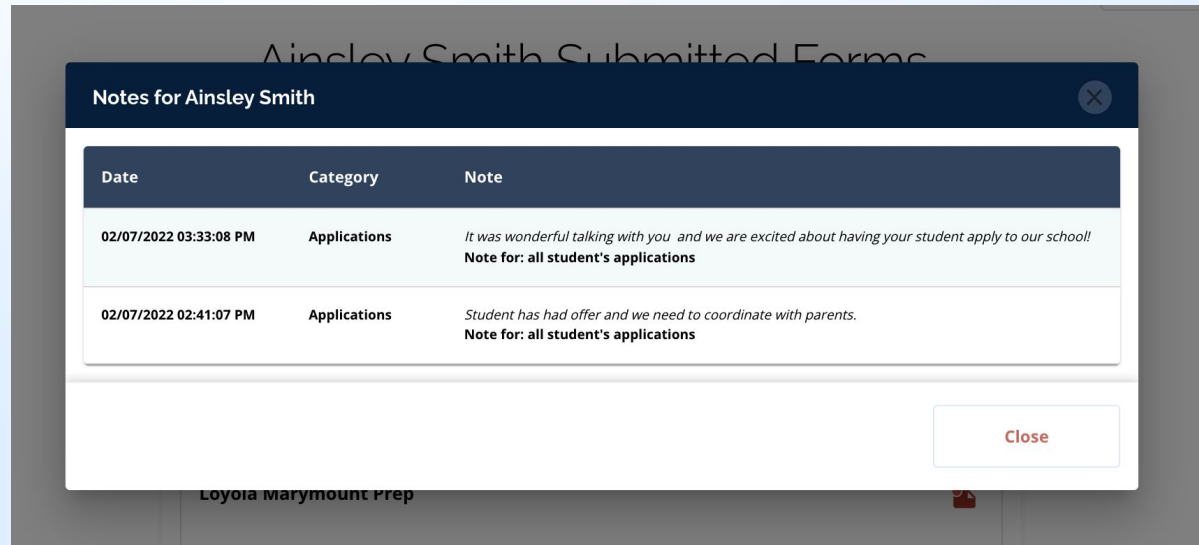
- There are New Notes Icons in the parent portal.
- One General Note area
- Notes icons next to each application with a note
- Read and unread status for parents.



The screenshot displays the parent portal interface for Gonzaga University. At the top left is the Gonzaga University logo. Below it is a navigation link: [← Back to Dashboard](#). On the top right, there is a [Student Notes](#) button with a red notification icon. The main heading is "Ainsley Smith Submitted Forms". Below this heading is a sub-heading: "View status and take action on all submitted applications and enrollment forms for Ainsley Smith." The main content area is titled "Ainsley's Applications" and includes a "+ Applications" button. Below this, there is a "Lottery Application" section with an "Edit Ranking" button and a pencil icon. The "G Prep Open Enrollment" section shows a status of "Submitted & Eligible" with a green dot and a "Withdraw" button. The "Loyola Marymount Prep" section also shows a status of "Submitted & Eligible" with a green dot and a "Withdraw" button. The "Pacific Prep" section shows a status of "Submitted & In Processing" with an orange dot and a "Withdraw" button. Each section also features a red notification icon.

# Notes Dialog for Parents

- See now that there is a category column. This is so that Registration Notes and Application notes can be differentiated when Registration Note enhancements are released.



Ainsley Smith Submitted Forms

Notes for Ainsley Smith

Date	Category	Note
02/07/2022 03:33:08 PM	Applications	<i>It was wonderful talking with you and we are excited about having your student apply to our school!</i> <b>Note for: all student's applications</b>
02/07/2022 02:41:07 PM	Applications	<i>Student has had offer and we need to coordinate with parents.</i> <b>Note for: all student's applications</b>

Close

Loyola Marymount Prep



# Re-Enable Grade Levels

Enable Grade Levels that were previously made disabled



- Hide/Show checkbox for disabled Grade Levels

## Manage Schools & Programs

General

**Schools/Programs**

Date & Time

Manage Users

Lotteries

Content/Letters

### Manage Grades

Add, edit, and delete school/program grades.

Add New Grade

Hide Disabled Grades

Numeric	Grade	Birthdate Range	Ignore Age Range	Flag Year Older	Flag Year Younger	Actions
-3	ECE4	N/A - N/A	Y	N	N	 Disable

## Manage Schools & Programs

General

**Schools/Programs**

Date & Time

Manage Users

Lotteries

Content/Letters



Custom Data

### Manage Grades

Add, edit, and delete school/program grades.

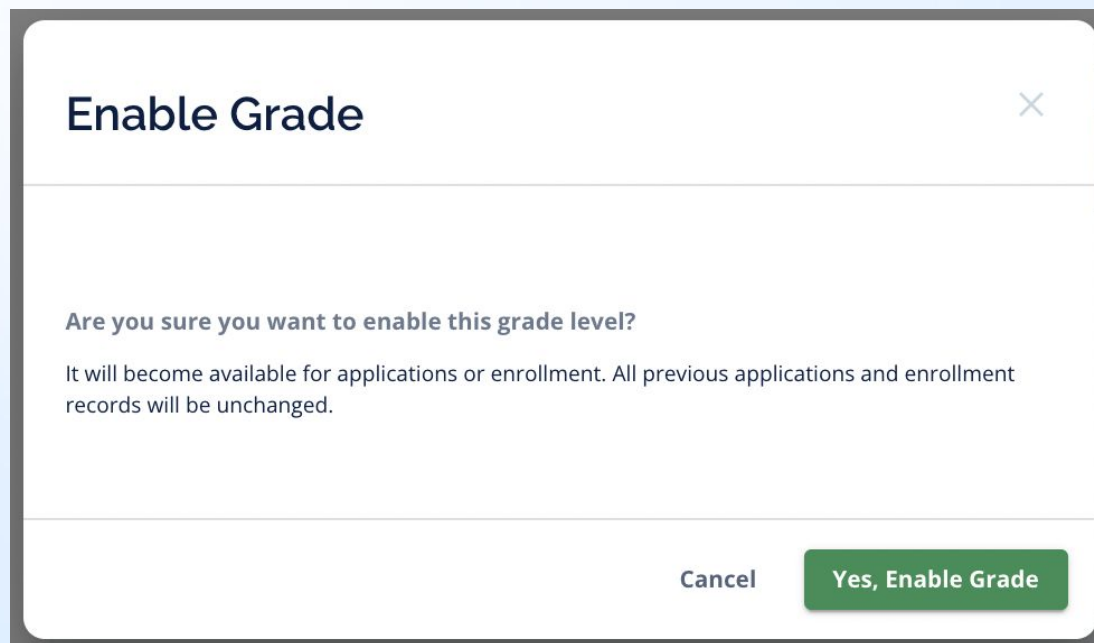
Add New Grade

Hide Disabled Grades

Numeric	Grade	Birthdate Range	Ignore Age Range	Flag Year Older	Flag Year Younger	Actions
-4	ECE3	N/A - N/A	Y	N	N	 Enable
-3	ECE4	N/A - N/A	Y	N	N	

# Re-Enable Grade Dialog

Now Grade Levels can be re-enabled.





# Date Range Condition Logic

Use Date Range Logic in Rules Engine



# Date Range Condition

- Date Ranges can now be used in the Rules Engine
- Note: The Date Range Condition is available in the rules engine in all places except for Reports due to performance impact.

Match **ANY** ALL of the following conditions

Lookup Field: auto\_eligibility × ▾ Operator: In the past ▾ # of days: 5 ×

**OR**

Lookup Field: priority\_nw ▾ Operator: Between ▾ Start Date: 11/17/2 📅 End Date: 11/30/2 📅 ×

**OR**



# Filter Apps by No Priority

Existing Priority Filter now has a No Priority option to filter by



# No Priority Filter

- Added “No Priority” option in the Priority filter to find students who don’t have any priorities.

No Priority Option

The screenshot shows the 'Student Applications' page in the SchoolMint Enroll system. The page includes a navigation bar with 'Dashboard', 'Students', and 'Applications' tabs. The main content area is divided into several filter sections: 'Filter by Status' (with checkboxes for Submitted, Not Submitted, Eligible, Ineligible, and In processing), 'Submission Date Range' (with 'From' and 'To' date pickers), 'Withdrawn' (with checkboxes for Withdrawn and Not Withdrawn), and 'Lotteries' (with a 'Lottery List' dropdown and a 'Lottery Status' button). On the right, the 'Filter by Application Attribute' section contains dropdown menus for 'Form Process', 'School', 'Grade', 'Category', and 'Program'. The 'Priority' dropdown menu is open, showing options: 'No Priority', 'Bernal Heights', and 'Chocolate'. An orange arrow points from the 'No Priority Option' text box to the 'No Priority' option in the dropdown menu.



# Bulk Offer Waitlisted Students

Move students in bulk from waitlisted to offered



# No Setup Required!

- Any time there are placements available and there are students on the waiting list, then the bulk offer button will automatically display.
  - Note: This is less likely to happen if Auto-Rollup is turned on.

Grade: K

OFFERED LIST Publish by Grade

Rank	ID#	Student Name	Status	Sub-Lottery	Weight	Priority	Actions
1	473	Jack Horn		1	1	Bernal Heights	<a href="#">Placement</a>
2	453	Miss Muffett	✖			No Priority	<a href="#">Placement</a>

WAITING LIST

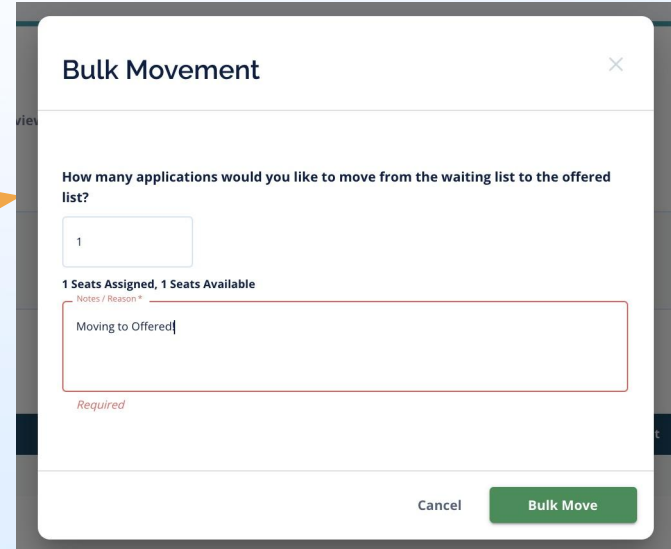
Rank	ID#	Student Name	Status	Priority	Actions
1	454	LittleRed RidingHood		No Priority	<a href="#">Placement</a>

**Bulk Offer Button Appears Automatically!**

# Bulk Offer Dialog

- Number to move will never exceed the maximum number of placements available

**Bulk Offer Dialog**



The screenshot shows a dialog box titled "Bulk Movement" with a close button (X) in the top right corner. The main text asks, "How many applications would you like to move from the waiting list to the offered list?". Below this is a text input field containing the number "1". Underneath the input field, it displays "1 Seats Assigned, 1 Seats Available". There is a label "Notes / Reason" above a larger text area containing the text "Moving to Offered". A red border around this text area indicates it is a required field. At the bottom right, there are two buttons: "Cancel" and "Bulk Move".

# Completed Bulk Offer

Grade: K

OFFERED LIST

Publish by Grade

Rank	ID#	Student Name	Status	Sub-Lottery	Weight	Priority	Actions
	453	Miss Muffett	✖	1	1	No Priority	<a href="#">Placement</a>
1	473	Jack Horn		1	1	Bernal Heights	<a href="#">Placement</a>
2	454	LittleRed RidingHood		1	1	No Priority	<a href="#">Placement</a>

WAITING LIST

No applications on Waiting List

# Scheduling User Permissions






Control View, Edit, Delete permissions for Events and RSVP's



# Scheduling User Permissions

- Events and RSVP's already have data filtered to only the schools/students they should have access too.
- Now user groups can be set up with various levels of View, Modify, and Delete permissions.
- Once released previously existing user groups for customers get full access so that no functionality is changed on them. They can be notified they can now fine tune the permissions.
- New user groups from now on have no access unless they are given permission except for the Super Admin account which is always seeded with full permissions.

## Scheduling

-  View Events
-  Modify Events
-  View RSVPs
-  Edit RSVPs
-  Delete RSVPs



# Contact Mapping

How do you tell Enroll which contact record in the SIS to map to?



# Contact Mapping

In this release:

- Table Lookup (admin sets a condition to look up the correct record in the source table, example: `contact_type=P1` for the primary guardian)
- Contact import mapping
- Contact export mapping
- Contains condition (if this field value contains “xyz” then true – also can be used for race field mapping)

Coming soon:

- Index condition (first, second, third... record in a table)
- Usability improvements and tooltips/doc

# Contact Mapping

Guardians Information

To SchoolMint Enroll Field	Mapping Type	From PowerSchool Field	Table lookup
student_annual.guardian1_fname	Direct	Contacts.FirstName	QA1 <a href="#">Edit</a>
student_annual.guardian1_lname	Direct	Contacts.LastName	QA <a href="#">Edit</a>
student_annual.guardian1_email	Direct	Contacts.Emails1	QA1 <a href="#">Edit</a>
student_annual.guardian1_phone	Direct	Contacts.Phones1	QA1 <a href="#">Edit</a>
student_annual.guardian1_phone2	<input checked="" type="checkbox"/> Transformation <a href="#">Edit</a>	—	QA1 <a href="#">Edit</a>
student_annual.guardian1_address	Do Not Map	—	x <a href="#">Edit</a>

Use Table Lookup to set a condition that selects which contact record to map to from the SIS

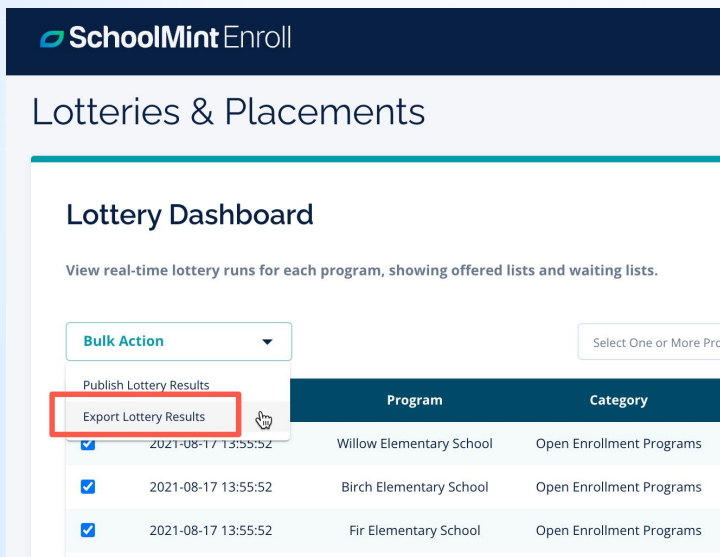
# Bulk Export Lottery Results

Export lottery results one program at a time? Nope.



# Bulk Export Lottery Results

- On the Lotteries page, bulk action exports in CSV



**SchoolMint Enroll**

## Lotteries & Placements

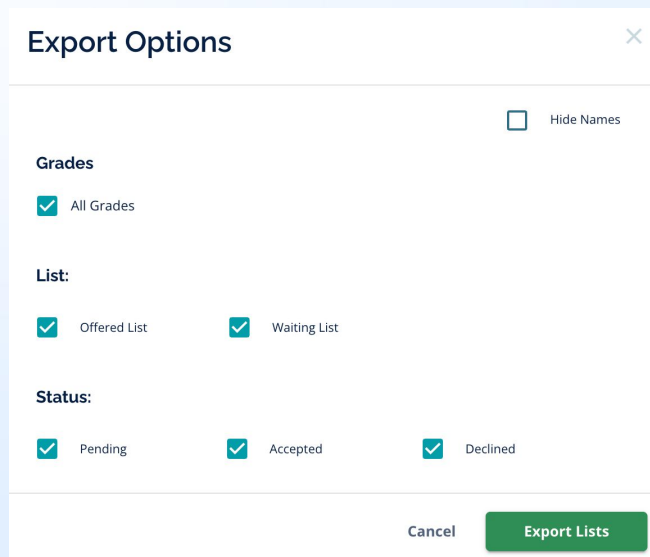
### Lottery Dashboard

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

**Bulk Action** Select One or More Programs

- Publish Lottery Results
- Export Lottery Results**

	Program	Category
<input checked="" type="checkbox"/>	2021-08-17 13:55:52	Willow Elementary School - Open Enrollment Programs
<input checked="" type="checkbox"/>	2021-08-17 13:55:52	Birch Elementary School - Open Enrollment Programs
<input checked="" type="checkbox"/>	2021-08-17 13:55:52	Fir Elementary School - Open Enrollment Programs



### Export Options

Hide Names

**Grades**

All Grades

**List:**

Offered List  Waiting List

**Status:**

Pending  Accepted  Declined

Cancel Export Lists

# Registration Table

Save data to a registration record when using the form builder and report on fields saved to this record, create flags, and more!




# Registration Table


- Visual Walk Through
- How do I set this feature up?
- Troubleshooting tips
- Known Issues



# Registration Table


- The registration table will function similarly to the application table.
- Custom fields can be saved to the `registration` record in the form builder.
- Admins can track registrations that have been withdrawn and filter for them
- The Not Started filter has been deprecated.
- Save flags to the registration record
- Build reports using registration fields
- New User Permissions
- Parents can edit the registration from their parent dashboard.

# Registration Table - Save Fields to the Registration Record

**Data Settings** 

Save To \*  
Registration 

Field Name \*  
Custom  

Custom Field Extension \*  
Essay 

*(only alphanumeric characters, starting with a letter, and no spaces)*

**Save custom extension fields to the registration record.**

**When to use: Much like saving to the application record. Save fields to this record when the answer is specific to the registration form being submitted.**

# Registration Table - Registration Management View

## Student Registrations

### Filter by Status

#### Show Registrations:

Submitted

Not Submitted

#### With Status:

Approved

Denied

In Processing

#### Submission Date Range:

From



To



#### Withdrawn:

Withdrawn

Not Withdrawn

Removed the Not Started filter

Ability to filter for Withdrawn Registrations

# Registration Table - Flags

## Flag Types: Add New

**Flag Information**

Flag Type Name\*  
Registration Flag

Save Flag To Record\*  
Registrations

*Saving to student will flag across all applications for a student*

**Show For**

Applications

Enrollment

**Save flags to the registration record - When saved to the registration record the flag will throw only for the single registration (much like saving to the application)**

**Indicate where to show your flag - the application or registration management screen**

# Registration Table - Reporting

The screenshot shows the 'Add or Edit Field' dialog box. On the left, a sidebar contains 'Report Options', 'Select Fields', 'Add Filters', and 'Manage Access'. The dialog has a title bar with a close button. Below the title, there is a dropdown menu with options: 'Application', 'Registration', 'Student', and 'Student A...'. To the right of this menu, the text 'Select Form Process' is visible above a dropdown menu showing 'Show All Fields'. Further right, another dropdown menu is labeled 'Select Field \*'. Below these elements, the text 'Enter how you would like this field to be displayed in the report:' is followed by a text input field labeled 'Display Field \*'. An orange arrow points from the 'Add Display Fields' callout box to the 'Registration' option in the dropdown menu.





**Add Filter Fields**  
Choose fields saved on  
the registration record to  
filter a report

**Add Display Fields**  
Choose fields saved on  
the registration record to  
display in a report

The screenshot shows the 'Reports' interface with a dropdown menu open. The sidebar on the left contains 'Report Options', 'Select Fields', 'Add Filters', and 'Manage Access'. The dropdown menu lists the following fields: 'registration', 'id', 'legacy\_id', 'maxstep', 'parent\_notes', 'payment\_amount', 'payment\_trans\_id', 'percentage', 'reg1', and 'registration\_type1'. An orange arrow points from the 'Add Filter Fields' callout box to the 'registration' field in the dropdown menu.

# Registration Table - User Permissions

## Enrollment/Registration

-  View Enrollments
-  Edit Enrollments
-  Withdraw Enrollments
-  Delete Enrollments

## Enroll: Edit



**Withdraw Enrollment:**  
- Withdraw Button  
- The student's registration is withdrawn and can still be filtered in the registration management screen

**Delete Enrollment:**  
- Trashcan Icon  
- The student's registration is deleted and cannot be filtered and found in the registration management screen

# Registration Table - Guardian Dashboard/ Student Profile

## Tom's Registrations

East West Middle

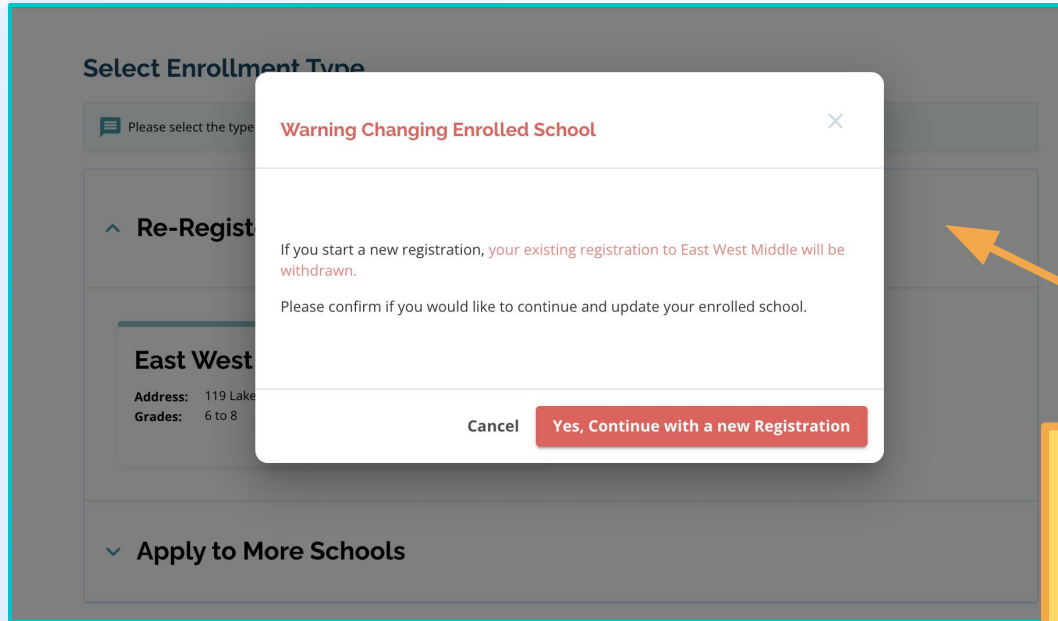
● Approved

Withdraw



**Ability to Edit and  
Withdraw Submitted  
Registrations**

# Registration Table - Guardian Withdrawn Alert



The screenshot shows a web interface for school registration. A modal dialog box is centered on the screen, overlaying a form titled "Select Enrollment Type". The dialog box has a red title "Warning Changing Enrolled School" and a close button (X) in the top right corner. The main text of the dialog reads: "If you start a new registration, your existing registration to East West Middle will be withdrawn." Below this, it asks: "Please confirm if you would like to continue and update your enrolled school." At the bottom of the dialog, there are two buttons: "Cancel" and "Yes, Continue with a new Registration". The background form is partially visible, showing sections for "Re-Register" and "East West" with address and grade information.

Select Enrollment Type

Please select the type

^ Re-Register

East West

Address: 119 Lake  
Grades: 6 to 8

Cancel Yes, Continue with a new Registration

▼ Apply to More Schools

**When a guardian tries to start a new registration for their student, and there is an already submitted & not withdrawn registration, they will see an alert to confirm before continuing**

# How do I set up this feature?

Great news - this feature is out of the box and will be available upon install of any new org. Any existing orgs will see this feature available upon the general release of v1.3.2

# Troubleshooting Tips

- The new registration table will function much like the application table. If you save a field to the registration record, the field response will not carry over onto other registration forms completed for other schools by that student.
  - EXAMPLE: The field `registration essay` is saved to the registration record. Student completes a registration to school East West High School. The answer they input for `registration essay` will only save for that school. If the student withdraws their registration for East West High School and then completes a registration for North South High School; the answer they input originally for East West High School will not pre-populate.
- There is a limit of 1 started and/or submitted registration. If a parent tries to input a second registration an alert will appear that the other registration will be withdrawn.
- Not started registrations can be found by creating a report using the same eligibility rules to determine if a student can register/ re-register.

# Thank You!

For questions, please contact Support or your Customer Success Rep

