

 **SchoolMint** Enroll

# 1.6 Rollover Process

Run the End of Year Rollover Process!

Feature Walk-Through / Product & Engineering

A woman with dark hair is sitting at a desk, writing in a notebook with a pen. The image is overlaid with a semi-transparent blue and green gradient. The text 'What We'll Cover Today' is written in white on the left side of the image.

# What We'll Cover Today

- What is Rollover?
- Before you Rollover
- How to run the Rollover
- What data was processed During the Rollover
- What to do after the Rollover
- Troubleshooting

\*Note: Some of the screenshots show inconsistent example years.

# What is Rollover?

**All of the year specific information from your current year is copied to next year. This includes all setup, students and more!**

# Before you run the Rollover Process

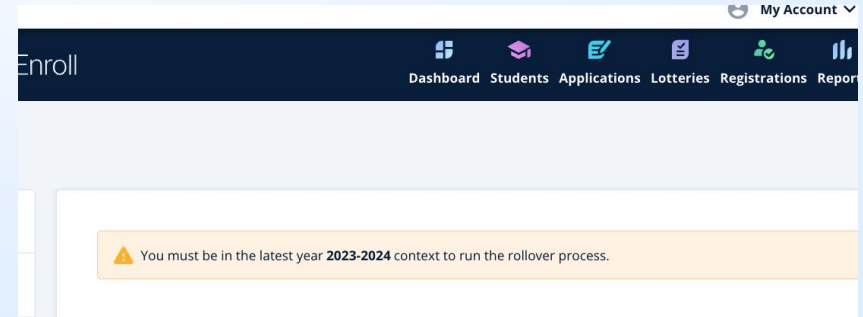
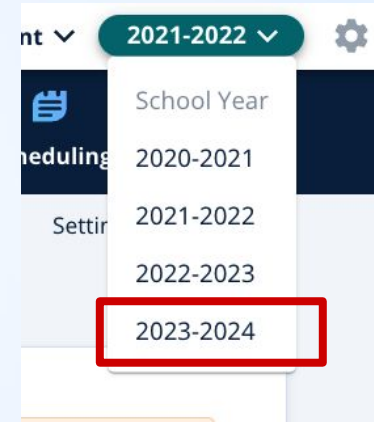
1. Make sure all data you want to roll over is in the source year.
2. Be in the latest year context in the year selector at the top of the page.
3. Verify settings
  - a. User permissions to access running the rollover
  - b. Clear field on rollover settings
  - c. Rollover waitlists setting (Enabled Globally and per Program)
  - d. Set "Skip a Grade" and "Retained" settings per student where applicable

# All Needed Data in Source Year Has Been Entered

- The rollover is a one time process per year.
- It will copy all of the data from the current year into the next year.
- No data entered in the previous year will copy over to the next year after the rollover process is complete

# Be in the Latest Year Context

The rollover process will only work in the latest year you have for in your org.



# User Permission for Rollover

Settings > Manage Users > User Groups > Super Admin

## 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

Cancel

Save User Group

#### Information

Group Name \*

Super Admin

Description

Access to everything in the system.

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

- View Enrollments

##### Enrollment/Registration

- Edit Enrollments
- Withdraw Enrollments
- Delete Enrollments

##### Flags

- Dismiss Flags

##### Lottery

- Run Lotteries
- Manage Cutoff Numbers
- View Offered List

- View RSVPs
- Edit RSVPs
- Delete RSVPs

#### Settings

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

# Clear Fields on Rollover

If you have any fields in your form process that you do not want to copy to the next year, Then check the Clear on Roll Over checkbox.

Settings > Forms > Applications > QAA Parent Application Flow > About You > What Is Your Favorite Fruit ?

## Manage Forms

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

**Forms**

Guardian Theme

Roll Over

Sync Service

Boundaries

Internal

Migration Import

Imports

### What is your favorite fruit ? : Edit

Cancel Save Field

**Field Parameters**

Field Type \*  
Checkbox

Field Label \*  
What is your favorite fruit ?

Field Description/Note  
What is your favorite fruit ?

Required  Required Admin

**Field Options**

Data Source  
Enter Manually Below

Include "None" option  
 Include "Other" option

Other Placement  
Bottom

**Data Settings**

Save To \*  
Student Annual

Field Name \*  
fruit

Order	Option Value	Label (only if different than value)	Default Value	Actions
=	Option Value * banana	Label Banana	<input type="radio"/>	+ -
=	Option Value * pineapple	Label Pineapple	<input type="radio"/>	+ -

**Advanced Options**

**Disable Options**

Disable After Submit  
 Disable for SIS Students

**Restrictions**

Admin Only  
 Hide for SIS Students

**Other**

Clear on Roll Over

# Signature Fields are always Cleared

Other 

Clear on Roll Over

*Signature fields are always cleared during the rollover process.*

# Rollover Waitlists

Some organizations want to copy only the waitlisted applications to the new year so that those students are at the top of the rank for next year.

In order to have the waitlists rollover, the global setting needs to be checked as well as the Program level setting. They are ordered from 1 to X with no gaps in rank numbering.

## Global Lottery Waitlist Setting: “Rollover Waitlist on Rollover”

Manage Lotteries

Settings > Lotteries > Settings

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Sync Service

Boundaries

### Lottery Settings

GLOBAL BY FORM PROCESS (S)

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-define student's other applications on **OFFERED LIST** upon accepting seat into another choice
- Auto-define **APPLICATIONS** as offered but if **OFFER** is not accepted by:

#### Waiting List

- Auto-rollop applications from waiting list to offered list when another application on offered list is declined
- Rollover waiting list on rollover

#### Past Lottery

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

Cancel Save Settings

Internal Setting for resetting status of rolled over Waitlists

### Application Settings

Reset application submission & eligibility statuses if rolled over

## Program Waitlist Setting: “Rollover Waiting List”

Manage Schools & Programs

Settings > Schools Programs > Programs > Edit

General

Schools/Programs

Date & Time

Manage Users

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

### QAA Parent Apply Flow Program - Active:

Edit

Cancel Save Program

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

#### Primary Settings

Priority Group: Barista Lottery

Lottery Group Design: General Lottery

#### Waitlist Settings

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

#### Notification Settings

Using Consolidated Results Notification [Click Here to Edit](#)

Accepted Placement Notification: Lottery Placement Accepted - Parent Notification

Declined Placement Notification: Lottery Placement Declined - Parent Notification

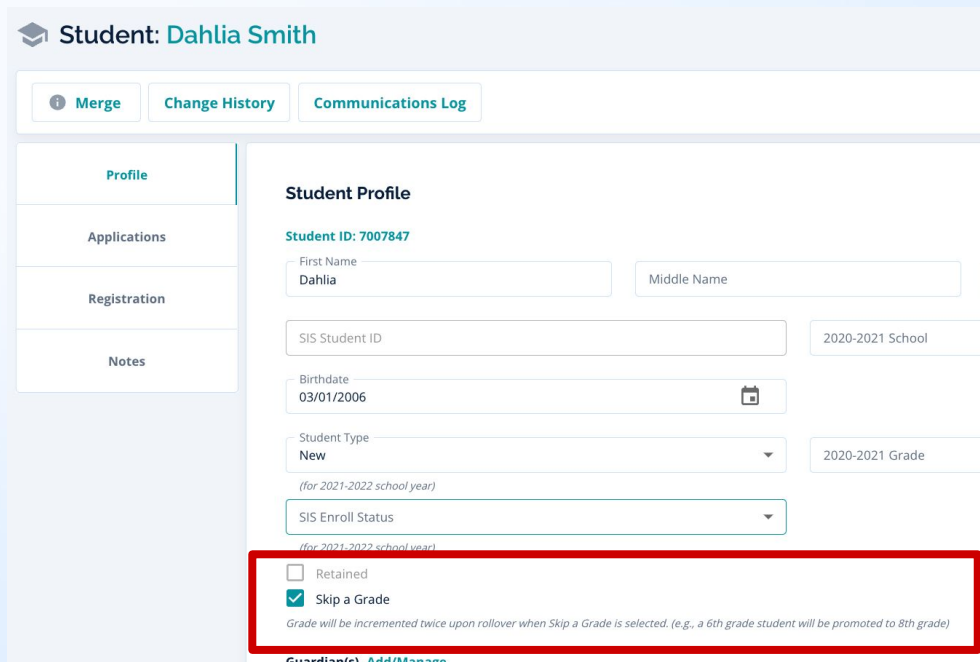
Cancel Save Program

# Retained and Skip a Grade Settings

Select the Retained or Skip a Grade settings accordingly.

Students who have neither checked will be promoted one grade level by default during the rollover process.

Students who get promoted beyond the grade levels set up for the org will have a grade level of 99.



**Student: Dahlia Smith**

[Merge](#) [Change History](#) [Communications Log](#)

**Profile**

Applications

Registration

Notes

**Student Profile**

**Student ID: 7007847**

First Name:  Middle Name:

SIS Student ID:  2020-2021 School:

Birthdate:

Student Type:  2020-2021 Grade:

(for 2021-2022 school year)

SIS Enroll Status:

(for 2021-2022 school year)

Retained

Skip a Grade

Grade will be incremented twice upon rollover when Skip a Grade is selected. (e.g., a 6th grade student will be promoted to 8th grade)

**Guardian(s)** [Add/Manage](#)

# How to Run the Rollover Process

1. Go to Settings > Rollover
2. Type “rollover” (in all lower case) in the text box to verify you would like to start the rollover
3. You will receive an email once the rollover process is complete. Refresh the page to see the rollover is complete

The screenshot shows the 'Roll Over' settings page in the SchoolMint Enroll system. The user is Chad Smith at Cirque Du Dahlia, and the current school year is 2023-2024. The page has a navigation bar with icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The 'Roll Over' section is active, showing a list of settings on the left: General, Schools/Programs, Date & Time, Manage Users, Lotteries, Content/Letters, and Custom Data. The main content area contains a warning message: 'This process will copy all of your setup from the 2023-2024 school year to the 2024-2025 school year.' Below this, there are five bullet points explaining the consequences of the rollover. At the bottom, there is a text input field with the placeholder 'Type "rollover" to proceed' and a 'Start Roll Over' button.

Chad Smith | Cirque Du Dahlia

My Account 2023-2024

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Roll Over

## Roll Over

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

**This process will copy all of your setup from the 2023-2024 school year to the 2024-2025 school year.**

- Once the rollover is complete, any subsequent changes that you make to the setup of the **2023-2024** school year will not be reflected in the **2024-2025** school year.
- Student grade levels will be incremented by one grade level, unless "Retained" or "Skip a Grade" is selected.
- If you set your programs to roll over their waiting lists, those waiting lists and applications will carry over to the **2024-2025** school year.
- All of your data from the **2023-2024** school year will remain accessible through the school year drop-down menu at the top right of the page.
- Remember to double-check your default year in the "Date & Time" settings area after the rollover process is complete.

Type "rollover" to proceed with running the rollover process

Type "rollover" to proceed  
rollover

Start Roll Over

# Rollover in Process

“Please wait...” message will appear while the process is running.

**This process will copy all of your setup from the 2023-2024 school year to the 2024-2025 school year.**



- Once the rollover is complete, any subsequent changes that you make to the setup of the **2023-2024** school year will not be reflected in the **2024-2025** school year.
- Student grade levels will be incremented by one grade level, unless “Retained” or “Skip a Grade” is selected.
- If you set your programs to roll over their waiting lists, those waiting lists and applications will carry over to the **2024-2025** school year.
- All of your data from the **2023-2024** school year will remain accessible through the school year drop-down menu at the top right of the page.
- Remember to double-check your default year in the “Date & Time” settings area after the rollover process is complete.

Please wait while we roll over the system from 2023-2024 to 2024-2025

# Rollover Complete

This process will copy all of your setup from the 2023-2024 school year to the 2024-2025 school year.



- Once the rollover is complete, any subsequent changes that you make to the setup of the **2023-2024** school year will not be reflected in the **2024-2025** school year.
- Student grade levels will be incremented by one grade level, unless "Retained" or "Skip a Grade" is selected.
- If you set your programs to roll over their waiting lists, those waiting lists and applications will carry over to the **2024-2025** school year.
- All of your data from the **2023-2024** school year will remain accessible through the school year drop-down menu at the top right of the page.
- Remember to double-check your default year in the "Date & Time" settings area after the rollover process is complete.

✓ The school year roll over from **2023-2024** to **2024-2025** was successfully completed.

Email will be sent based based on the Rollover Complete Email Template.

## Content/Letters

Settings > Content Letters > Email Text Templates > Edit

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

### Rollover Complete: Edit

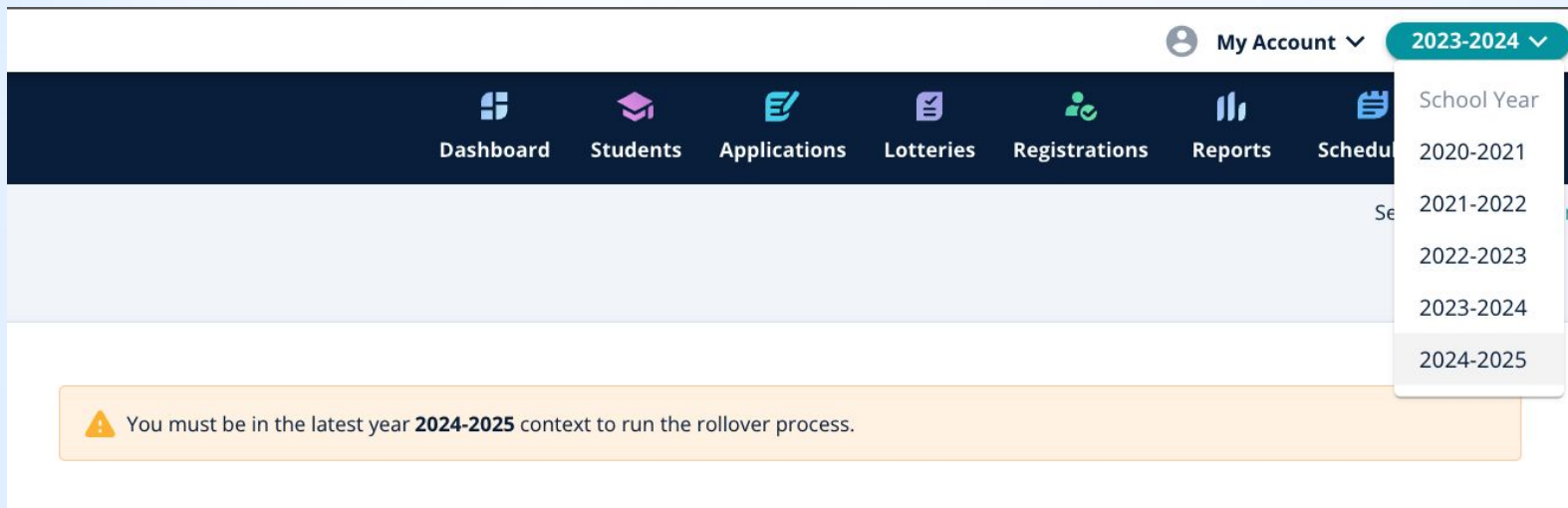
[Cancel](#) [Save Template](#)

General Information	Information
Content Name* Rollover Complete	<input checked="" type="checkbox"/> All Schools/Programs
Type General Template	
Description	

**Language & Translations**

EN	ES
----	----

# Must Refresh Page to See New Year



The screenshot displays a web application interface. At the top right, there is a user profile icon labeled "My Account" and a dropdown menu for the school year, currently set to "2023-2024". Below this is a dark navigation bar with icons and labels for "Dashboard", "Students", "Applications", "Lotteries", "Registrations", "Reports", and "Schedule". A dropdown menu is open from the "2023-2024" button, showing a list of school years: "2020-2021", "2021-2022", "2022-2023", "2023-2024", and "2024-2025". The "2024-2025" option is highlighted. Below the navigation bar, there is a light orange warning box with a triangle icon and the text: "You must be in the latest year **2024-2025** context to run the rollover process."

# What Data Rolls Over

- Students
- Custom Fields
- Events (Not Sessions)
- Sibling Designations/Associations (Anonymous Sibling Grade Incremented by 1)
- Form Processes (Including translations)
- Annual Program Settings
  - Form Process Associations
  - Date Settings incremented by a year
- Annual School Settings
  - Registration Dates (incremented by a year)
- Lottery Setup
- Waitlisted Students (When enabled)

# What Data Does Not Roll Over

- Registration Records
  - Note: Current School for Student is Updated based on approved registrations
- Event Sessions
- Any form fields set to clear on rollover
- All Signature Fields

\*Note: Registration Settings are copied over

# What To Do After Rollover Is Complete

- Update Default Year and Parent Access Year
- Update Year Sync Setting
- Update Lottery Cutoffs
- Double check date settings
- Create Sessions as Needed
- Do any necessary changes on anything else that you want to be different than last year.

# Update Default Year

When the time is right, typically after the SIS rollover process, update the default year and adjust parent access.

\*Note: If you are syncing data from the SIS, you will need to turn on parent access for that year. (Subject to change through future development.)

The screenshot shows the 'Date & Time' settings page. The sidebar on the left contains the following menu items: General, Schools/Programs, Date & Time (highlighted), Manage Users, Lotteries, Content/Letters, Custom Data, Forms, Guardian Theme, Roll Over, Sync Service, Boundaries, Internal, Migration Import, and Imports. The main content area is titled 'Date & Time' and includes a breadcrumb 'Settings > Date & Time'. It features a 'Save Date & Time' button in the top right. The 'Application Dates' section has a button 'Click to Manage for Each Program Category'. The 'Registration Dates' section has a button 'Click to Manage for Each School Level'. The 'Timezone' section has a dropdown menu labeled 'Select Timezone' with 'Mountain Time (e.g. Denver)' selected. The 'School Years' section contains a table with columns 'Default', 'School Year', and 'Parent Access'.

Default	School Year	Parent Access
<input type="radio"/>	2020-2021	<input type="checkbox"/>
<input checked="" type="radio"/>	2021-2022	<input checked="" type="checkbox"/>
<input type="radio"/>	2022-2023	<input type="checkbox"/>
<input type="radio"/>	2023-2024	<input type="checkbox"/>

A 'Save Date & Time' button is located at the bottom right of the main content area.

# Update Sync Settings

- By default the Sync for the new year is OFF
- Right before you run the SIS Rollover you can turn off the sync for all years in Enroll.
- Then after you have run the rollover process on your SIS, then update your settings to turn on the sync for the new year.

Settings > General

## General Settings

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

### Contact Information

Organization Name: Cirque Du Dahila

Address: P.O. Box 9999

Address 2: Lafayette, LA 70506

Main Phone: 337-269-0299

State: LA

Zip Code:

Reply-To Email:

Save General Settings

### Parent Settings

Allow Parents to Withdraw Applications on their Dashboard

### Sync Service

Enable Sync Import for Year 2023

### Notifications

Save General Settings

# Update Lottery Cutoffs

Lottery cutoffs on designs and group designs are set to 0 by default.

Adjust these cutoffs accordingly for the new year.

Settings > Lotteries > Cutoff Numbers

## Manage Lotteries

General

Schools/Programs

Date & Time

Manage Users

**Lotteries**

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

### Lottery Cutoff Numbers

Cancel Save All Cutoff Numbers

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

Select One or More Programs  
QAA Parent Apply Flow Program... School Level Program Categories Apply Filters

**QAA Parent Application Flow School Level: Open Enrollment**

QAA Parent Apply Flow Program - Active

Grade	Group	Cutoff Numbers	Current	Available
PreK3	General Lottery	0	0	0
PreK	General Lottery	0	0	0
K	General Lottery	0	0	0
1	General Lottery	0	0	0

# Adjust Any Date Settings

All date settings will have been incremented by one year.

From here you can fine tune the dates to be exactly what you want them to be for the new year.

\*Below is one example, but there are various date settings throughout the system

Settings > Schools Programs > Program Categories > Open Enrollment

## Manage Schools & Programs

General

**Schools/Programs**

Date & Time

Manage Users

Lotteries

Content/Letters

### Open Enrollment: [Edit](#)

**Category Information**

Category Name\*  
Open Enrollment

Category Choice Limit  
2

Limit Per School  
1

**Application Dates**

Start Date  
11/01/2021 10:50 AM  
Mountain Time

End Date  
11/30/2024 05:25 AM  
Mountain Time

**Options**

Allow Applications to be Ranked

[Cancel](#) [Save Category](#)

# Create Sessions

When you are are ready, you can create the sessions for the new year.

## Scheduling

Cancel

Save Event

Event Details

Session(s)

RSVP Settings

Assign to  
Programs/Schools

Café Artist: [Session\(s\)](#)

Import CSV

All Times Mountain Time

Add Session

Start	End	Location & Details	Capacity	Actions
01:00 PM on 2021-12-01	02:00 PM on 2021-12-01		25	 

# Troubleshooting

- If there is a problem when running the rollover process it should automatically roll back the changes.
- Contact Customer Care at [schoolmint.zendesk.com](https://schoolmint.zendesk.com) if there is a problem and all data for the next year needs to be deleted to re-run the process, or perhaps your site was created with too many future school years and needs to be updated.

# **INCREDIBLE PERFORMANCE!!!**

The process has been highly optimized. Even our largest customer completes in under 5 minutes which previously would have taken about 12 hours!

# Expected Release Date

May 27th, 2022

# Questions

**Chad Smith**

Product Manager

[chad.smith@schoolmint.net](mailto:chad.smith@schoolmint.net)

**Tassnim Alkusaimi**

Associate Product Manager

[tassnim.alkusaimi@schoolmint.net](mailto:tassnim.alkusaimi@schoolmint.net)

