



SchoolMint Enrollment

Get Ready with Us: Lottery Edition | 1.31.2023



Welcome!



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Logistics



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



About SchoolMint



About SchoolMint

SchoolMint is founded on education by educators. We have been in the classroom, and in the recruiting office, know the daily struggles, and believe in your students just as much as you do. We are your partner and ally who speak your language, have been in your shoes, and understand your struggles.

We're here to help educators create bright, sustainable futures. That's our purpose.



District Strategic Plan

Attract

Marketing

Marketing Services

Engage[®]

Connect[®]

SchoolFinder[®]

Enroll

School Climate & Culture

Hero[®]

Grow[®]

SchoolRunner[®]

SEM/Climate Surveys

PBIS & Climate
Professional
Services

Enrollment

Enroll[®]

**Choice/Transfers
Applications**

**Student
Registration**

**Enrollment Fees,
Payments, forms**

Retain

Customer Service

CS Training
& Coaching

Secret Shopping

Instruction

Hero[®]

Grow[®]

SchoolRunner[®]

Coaching Training

District Impacts: Financial Stability | Operational Efficiency | Teacher Retention | Return on Investment | Student Success



Our Agenda



Agenda

- Lottery Configurations & Settings
- Processing your applications
- Running your lottery
- Q&A



Poll #1

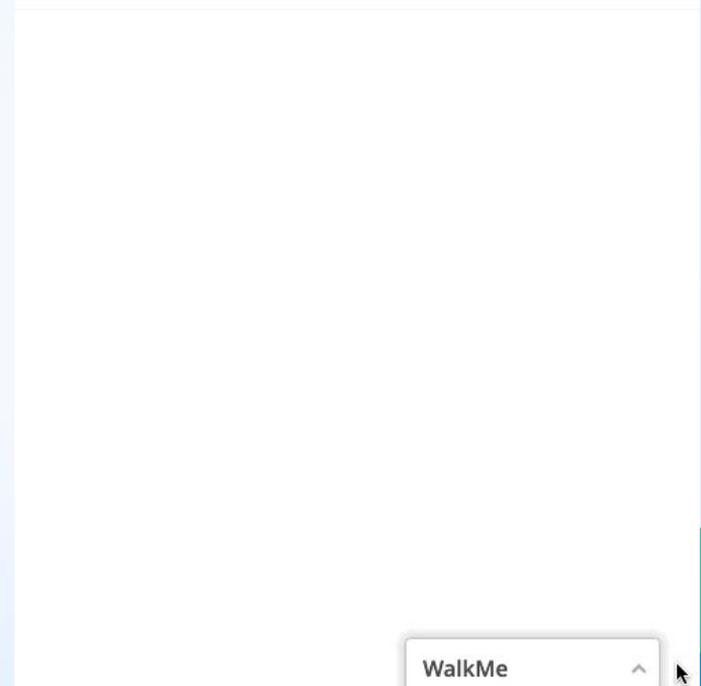
*How ready do you feel
to run your lottery?*



No need to panic!

Use our wide range of resources to help you:

- **Help Center**
 - Note our [“Prepare: Lottery Checklist” Article](#)
- **WalkMe Tutorials**
 - Embedded in your site
- **Technical Support Team:**
 - Submit a [ticket](#) for our team with your questions.
- **Customer Experience Manager:**
 - Reach out to schedule a 30 minute lottery checkin!



Lottery Configuration & Settings



Poll # 2

*Have you reviewed your
lottery configurations
and settings?*



Is your lottery design correct?

Settings -> Design and Build a Lottery

Need to make changes? Reach out to your Customer Experience Manager for assistance at least one month in advance of your lottery.

The screenshot displays a web interface for configuring a lottery. At the top, the 'Lottery Name' is 'Successful Academy Elementary'. Below it, 'Select Schools' is set to '1 selected' and 'Grade' is 'All Grades'. There are two radio button options: 'Allow lottery to run if pending priorities not validated?' (selected 'Yes') and 'Will this lottery have quotas?' (selected 'No').

The main section is titled 'Build Lottery' and contains three sub-lottery configurations:

- 1st sub-lottery:** 'Run this sub-lottery' is '1st'. It has a 'Sibling Attending' priority group with a weight of 1. There is a '+ Add Group' button and a 'Make weights cumulative' checkbox.
- 2nd sub-lottery:** 'Run this sub-lottery' is '2nd'. It has an 'In District' priority group with a weight of 1. There is a '+ Add Group' button and a 'Make weights cumulative' checkbox.
- 3rd sub-lottery:** 'Run this sub-lottery' is '3rd'. It has a 'No Priority' priority group with a weight of 1. There is a '+ Add Group' button and a 'Make weights cumulative' checkbox.

At the bottom left, there is a 'Support' button and another '+ Add Group' button. At the bottom right, there is a 'WalkMe' button.



Are your calendar dates correct?

Settings -> Set Up Calendar Dates

Pay close attention to the **Open Enrollment End date!**

School	Application Start * ⓘ	Application End * ⓘ	Open Enrollment Start * ⓘ	Open Enrollment End * ⓘ
Successful Academy Elementary	10/12/2022 11:00:00	02/04/2023 11:39:00	10/12/2022 11:00:00	02/01/2023 11:00:00



Do you want to enable offer expirations?

Settings -> Manage Offer Expirations

Save yourself the need to manually rescind offers after a certain time frame.

Manage Offer Expirations

You can update the number of days and the time of that day for when offers will be automatically rescinded (offer expiration) for the entire organization. Changes will only affect future offers.

Days to Expiration ?	Offer Expiration Time
<input type="text" value="5"/>	<input data-bbox="1408 691 1678 752" type="text" value="05:00 PM - US/Pacifi"/>

Cancel

Save



Are your email/text notifications updated?

Settings -> Manage Templates

Be sure your email and text notifications are clear, concise and to the point. Be sure families know what they need to do, and what to expect along the way!

Results per page: 25 ▾

Showing 1 to 1 of 1 entries

School	Language	Notification Type	Email Subject	Actions
Organization Default	English	Make Offer With Expiration	Congrats! Log in now to accept your \$schools_name admissions offer for \$student_full_name	Edit



Are your custom messages updated?

Settings -> Custom Messages

Get families excited about the lottery! Be sure to include useful information to help them understand what is to be expected.

Page	Text
Sign Up	Create your account to submit and track your student's application to Successful Academy Elementary!
Log In	Our lottery will be held Wednesday, January 31. Results will be posted on Friday, February 3rd.
Forgot Username	Enter your first and last name below to retrieve your username.



Are your decline reasons updated?

Settings -> Manage Discovery & Decline Reasons

Post lottery season - understand why families are declining an offer to your school.

Manage Decline Reasons

A decline reason must be chosen when cancelling, declining, or withdrawing an application.

Results per page:
 Showing 1 to 16 of 16 entries

Label	Status	Actions
Attending another school in Test School	Enabled Default	Change Status
Attending Charter school outside Test School	Enabled Default	Change Status
Attending Private school outside Test School	Enabled Default	Change Status
Attending Public school outside Test School	Enabled Default	Change Status
Commuter distance	Enabled Default	Change Status
School culture	Enabled Default	Change Status



Processing Your Applications



Poll #3

How frequently do you process applications?



Best Practices for Success

- You can easily track and organize your incoming applications with **SchoolMint**
- Set a dedicated time weekly or monthly to review applications
- Use the **SchoolMint** tools available to you.
- Set a plan, start early, reduce stress!



Age Inconsistent Applications

Reports -> Age/Grade Inconsistencies

Who might be too old or too young for a grade?

Age Inconsistent Applications ?

All Groups ▾ All Schools ▾ All Grades ▾

Results per page: 25 ▾
Showing 1 to 12 of 12 entries

Export as CSV / XLS

Name of Student	Submission Date	Current Grade	School Applying to	Grade Applying to	Birthdate	Cut-Off Dates for Grade	Link To View Profile
Clayton Hugh	01/26/2023 12:18:59 PST	NA	Successful Academy Elementary	Kindergarten	08/14/2019	12/31/2016 - 12/31/2018	View
Doug Jones	01/26/2023 12:04:35 PST	NA	Successful Academy Elementary	Kindergarten	09/07/2019	12/31/2016 - 12/31/2018	View
Goldie Brown	01/26/2023 12:15:20 PST	First Grade	Successful Academy Elementary	Second Grade	03/07/2019	12/31/2013 - 12/31/2016	View
Hugh Air	01/26/2023 12:10:47 PST	NA	Successful Academy Elementary	Kindergarten	06/06/2019	12/31/2016 - 12/31/2018	View
Jasmine Brief	01/26/2023 11:58:17 PST	NA	Successful Academy Elementary	Kindergarten	01/05/2019	12/31/2016 - 12/31/2018	View
Kennith Plum	01/26/2023 12:17:49 PST	NA	Successful Academy Elementary	Kindergarten	07/12/2019	12/31/2016 - 12/31/2018	View



Duplicate Applications

Reports -> Duplicate Applications

Reminder: this report may also flag twins!

The screenshot shows a web application interface for the 'Application Index' report. At the top, there is a teal navigation bar with menu items: 'Dashboards', 'Students', 'Reports', 'Communications', 'Admissions', and 'Settings'. A 'Student search' field is located on the right side of the navigation bar. Below the navigation bar, the main content area is titled 'Application Index' with a help icon. A teal button labeled 'test' is positioned to the right of the title. Below the title, there is a row of five filter buttons: 'All Groups', 'All Schools', 'All Status', 'All Priorities', and 'All Grades'. A teal 'Search' button is located to the right of these filters. At the bottom left, there is a dark blue 'Support' button with a help icon. At the bottom right, there is a 'WalkMe' widget with an upward arrow.

Validate Priorities

Admissions -> Validate Priorities

Approve or deny priorities in advance of the lottery.

Sibling Attending Priority

All Groups All Schools All Grades All Status All Application Types All Priorities All Priority Statuses

Search

Results per page: 25
Showing 1 to 6 of 6 entries

Export as CSV / XLS Filter your query here

<input type="checkbox"/>	Student Name	Student School	Student Grade	Application Status	Application Type	Sibling Name	Sibling School	Sibling Grade	Priority Status	Actions
<input type="checkbox"/>	Doug Jones	Successful Academy Elementary	k	Submitted	Open Enrollment	Mindy Jones	Successful Academy Elementary	4	Approved	Undo Docs View
<input type="checkbox"/>	Flynn Craig	Successful Academy Elementary	k	Submitted	Open Enrollment	Matthew Craig	Successful Academy Elementary	k	Denied	Undo Docs View
<input type="checkbox"/>	Jasmine Brief	Successful Academy Elementary	k	Submitted	Open Enrollment	Clark Brief	Successful Academy Elementary	2	Approved	Undo Docs View
<input type="checkbox"/>	Kristina Craig	Successful Academy Elementary	1	Submitted	Open Enrollment	Matthew Craig	Successful Academy Elementary	k	Pending	Approve Deny Docs View
<input type="checkbox"/>	Roman Jones	Successful Academy Elementary	k	Submitted	Open Enrollment	Mindy Jones	Successful Academy Elementary	4	Pending	Approve Deny Docs View
<input type="checkbox"/>	Whitney Brief	Successful Academy Elementary	k	Submitted	Open Enrollment	Clark Brief	Successful Academy Elementary	3	Pending	Approve Deny Docs View



Lottery Readiness Dashboard

Dashboards -> Go Live Dashboard

Final check of your settings, and any possible errors!

The screenshot displays the 'Go Live Dashboard' interface. At the top, it says 'Go Live Dashboard' with a help icon. Below that is a subtitle: 'Run configuration validations and ensure that your SchoolMint system is ready to Go Live to parents using our Readiness tests.' The main section is titled 'Lottery Readiness'. Underneath, there's a 'Schools' section with a dropdown menu set to 'All Schools' and a green 'Run Validation' button. The validation results show a green checkmark and the text 'No Validation Errors!'. On the right side of this section, it says 'Successful Academy Elementary' with a dropdown arrow. At the bottom of the results area, there is a green checkmark and the text 'School has no validation errors, no actions needed!'.



Running your lottery



DEMO TIME

REMINDER:

Always, always, always run a test lottery in SANDBOX!

You can utilize the WalkMe button to navigate to your sandbox!

The image shows a help chat window titled "How can we help you?". At the top right, there is a search bar with the placeholder text "Filter your query here". Below the title bar, there are two tabs: "? SchoolMint Help" (active) and "? Help". A search input field contains the placeholder text "Type in your question..." and a magnifying glass icon. The chat area displays several suggestions:

- Ready for Application Launch?
- Take me to sandbox! (highlighted with a tooltip)
- SchoolMint Status Page
- Family Accounts
- Applications

The tooltip for "Take me to sandbox!" is a dark grey box with white text. The background shows a table with columns for "Siblings" and "Name", with rows for "Mindy J", "Matth Crai", "Clark B", "Matth Crai", and "Mindy J".



Why Sandbox?

This is a sandbox site for internal use only. Data will be refreshed nightly. All changes here will be lost then!

Sandbox is your place to play!

- Data is refreshed nightly
- Any changes you make in Sandbox will not copy to the live site
- Communications are ***not*** enabled on Sandbox

Use Sandbox to your advantage - practice 2-3 full lottery runs!



Steps to Run the Lottery

Admissions -> Lottery Dashboard

- Review / Update Open Seats
- Click “Run” lottery
- Review your lottery results - click “Current Results”

Publicize Offers

- Admissions -> Make Offers
- Publicize for all grades desired!

Manage Offers

- Accept, Decline or Rescind Offers

Make More Offers

- Admissions -> Make Offers
- Continuously make more offers to fill your seats!



Poll #4

*How ready do you feel to
run your lottery after
this session?*



Questions?



Closing Items



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

Please give us your feedback! Fill out the short survey to help us improve our webinars for the future!



Questions & Answers



Q&A

- When do you validate your priorities? Before or after all applications have been submitted? Our application period is 1/27 thru 2/16. So do I validate before or after 2/16?
 - As a best practice you should be validating priorities throughout the application period.
- Does the Lottery design roll over from year to year?
 - Yes, the lottery design rolls over from year to year. It's still worth reviewing annually.
- dynamic sibling priority - is this automatic in the post lottery setting?
 - Yes, the dynamic sibling priority is automatically given post-lottery. It's worth testing with a test lottery to ensure it functions as intended.
- Can we change the expiration of the offer once it is set? I believe last year, we could not change.
 - You can change the number of days to expiration through Settings > Manage Offer Expirations. This will only affect offers made after the setting is saved, so you can't change it once an offer is given. You can read more via [this article](#).



Q&A

- What happens if their offer expires and they then want to apply do they have to do it all over?
 - When the offer expires, their application is Rescinded. They will need to submit a new application to be added to the bottom of the waitlist. By logging into their existing SchoolMint account, the family will save time in submitting the new application because all of the information submitted in the original application will persist.
- As a follow-up, if our lottery settings are the same this year as last, won't they carry over to this year?
 - Correct, they will carry over from year to year. We still recommend re-confirming the settings.
- How do we move an application accidentally submitted for next year in this year's applications?
 - You will have to cancel their application and have them re-apply in the correct enrollment year.
- How do we reverse a registered applicant for next year and reverse back to the application received. (I see we have 2 registered applications. I previously stated no applications can be moved from application stage as of yet
 - You can revert an application status to a previous state. This [article](#) details how to do so.



Q&A

- What's the average percentage over for a waitlist cushion.
 - That depends on the organization! It varies school to school. We suggest looking at your data from prior years to analyze. The [Student Conversion Funnel](#) is a great place to see how many offers were made, and the percentage of those offers that moved to the accepted status.
- Sorry for the question I came in a little late... Do you have to preset the open seats for the lottery to run?
 - Yes, you need to preset the open seats for the lottery to run. If you want to have all students go to the waitlist, you can run the lottery with 0 open seats.
- Do you have to verify priorities in the sandbox?
 - You be should verifying priorities in your production site! Your production site copies over to Sandbox nightly, so it'll be mostly up to date with your validated priorities.
- If we are doing this for a district can the lottery be ran for all the schools at once?
 - Yes, you can use our Bulk Lottery feature! You can find details on Bulk Lottery [here](#)



Q&A

- How do I make sure we can continue to receive applications for our waitlists through this school year and until we switch to a new school year with School Mint? Are these the application start and application end dates?
 - Yes, you can keep your Application dates open. If you want these students to go directly to the waitlist after you run the lottery, you can have your open enrollment dates closed. You can read more about calendar dates via this [article](#).
- If the priority results are incorrect at the time of the lottery, can the lottery be re-run before they are published?
 - Yes, we can reset your lottery after it's been run in production. However, we strongly recommend running multiple test lotteries to avoid this! Requests to reset lotteries must be completed by the SchoolMint team, and can cause delays.
- the click here at top of screen- says you can do it for the whole network at one time?
 - Yes, you can use our Bulk Lottery feature to run all grades /schools at once! You can find details on Bulk Lottery [here](#)
- Please clarify again, the difference between "rescinding" an offer and "withdrawing" an offer?
 - From the "Offered" status, you can Accept, Decline or Rescind an offer. Once in Accepted or a further status, you can "Withdraw" the application from your lists. A list of our status definitions can be found [here](#).



Q&A

- Thank you so much for this informative presentation. Where can we find this recording for review after the call ends?
 - We will share a copy in a follow up email and we will post the content on our [Help Center](#),
- What do you mean that results are public? Do families see where other applicants are placed on the lottery?
 - Families will only be able to see the application results for their own students. Publicizing Results means that families can see if they have been offered a seat or placed on the waitlist. More information can be found in this [article](#).
- On the lottery results, am I able to skip to the next student on the waitlist?
 - Yes, there are multiple ways to make offers to students. More information can be found via this [article](#).



Q&A

- If a parent has submitted more than one application for a child, can we withdraw one of the extra applications?
 - Yes, you can find these applicants in the [duplicate applications report](#).
- You cannot do a mass lottery you have to process each grade?
 - You can use our Bulk Lottery feature to run all grades /schools at once! You can find details on Bulk Lottery [here](#).
- To ensure that my sibling attending and employee preference is still valid after the lottery? just click post-lottery priorities in individual preferences? if the sibling is NOT a sibling and i deny it (post lottery) will the application drop down in the waitlist because it was not verified?
 - You can click the [validate priorities](#) section after the lottery to approve deny post lottery application. While it does depend on your settings, our most common setup is that the the application with a denied sibling priority will drop down on the waitlist.
- I have a total of 5 school in 1 lottery, Do the priorities set be applicable to all schools?
 - This depends on your lottery design. Lottery designs are school and grade specific. Please review you lottery designs to determine if the priority would be applicable to all schools.



Q&A

- How do you decide your "placement order"?
 - The ordering of both your lottery and waitlist will be determined by your lottery settings, and if or if not you honor priorities post lottery. If you are unsure about your settings, please consult with your Customer Experience Manager.
- Where can I find information about AdHoc offers?
 - You can find more information about the multiple ways to make offers via this [article](#).
- So in the Sandbox, I just went in and approved the validation priorities so I could practice the lottery. That will not affect the production site, right?
 - Correct. Any changes you make in Sandbox will not copy to the production site.
- Open Enrollment end date should be the date after application closes right. there might be a week before the lottery runs right? Preoffers go out to residents that week
 - Think of Open Enrollment End date as your lottery deadline. For some schools, the lottery deadline is the same date as the application end date. Other schools chose to set the lottery deadline, and keep the applications open for submission. In this case, the application end date would come after the Open Enrollment End date.



Q&A

- A followup to the app start/end dates. If we want to accept apps year round, can the app end date of one school year go all the way up to the start of the open enrollment period of the next school year?
 - Yes the dates can go all the way to the next open enrollment period! Please see this [article](#) for more information.
- How do I publicize waitlist numbers for grades that I do not have seats available?
 - Even though there are 0 seats available, you will still see the “Make Lottery Results Public” button when navigating to the Make Offers page. Click this button to make results public for waitlisted families.
- How do you rescind an application and place that student at the bottom of the waitlist?
 - After rescinding an application, a new application for that same student will need to be submitted to add them to the bottom of the waitlist.



Q&A

- We run our lottery live and our administrator likes to show the lottery results on screen - is there a way to show the results without the priority listing being viewed?
 - You are able to view lottery results with or without the student's name listed. In both views, priority listing will remain.
- Why might my Lottery Dashboard be blank for this school year?
 - You will need to select the specific school from the "All Schools" dropdown list to view the dashboard on a school by school basis.
- Does "dynamic sibling applying priority" get the highest priority over the sibling attending priority?
 - Please reach out to your Customer Experience Manager to discuss further. By default, dynamic siblings will have the same weight as siblings attending. However, we can configure the waitlist to give top priority to dynamic siblings.
- Applications submitted after the open enrollment end date/time are automatically added to the waitlist after any others that are put on the waitlist from the lottery correct?
 - Two settings are available: honoring priorities post lottery or dishonoring priorities post lottery. You can read more about this setting via this [article](#).



Q&A

- Will families be able to download a schoolmint application on their phones?
 - SchoolMint supports mobile web. Families do not need to download another app to access SchoolMint on their phones. They can simply navigate to SchoolMint on their mobile web browser.



A smiling woman with curly hair, wearing a patterned blue top, is holding a tablet. She is in a classroom setting with other students visible in the background. The image has a green-to-blue gradient overlay.

Thank You!

