SchoolMint

SchoolMint Enrollment

Get Ready with Us: Lottery Edition | 2.28.2023

Welcome!

Andrew Hall
Director of Enablement

Jamie Parker
Professional Services Specialist

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®

School Climate & Culture

Hero®

Grow®

SchoolRunner®

SEM/Climate Surveys

PBIS & Climate Professional Services

Enroll

Enrollment

Enroll®

Choice/Transfers Applications

Student Registration

Enrollment Fees, Payments, forms

Customer Service

CS Training & Coaching

Secret Shopping

Retain

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
- After The Lottery (Waitlist Management)
- Things To Double Check Before You Start Lottery
- Q&A

During The Webinar...

Take Notes!

We will be covering a lot of content here, so feel free to jot down some notes for yourself as we go along!

Don't forget: all materials from today's session will be sent to you via email, and we will post them on our Help Center!

Follow Along!

We highly recommend checking out some of the functions we discuss on your **SANDBOX** testing site during the webinar!

Live Site:
mintyschools.schoolmint.net

Sandbox Site:
mintyschools.schoolmint**2**.net

Ask Questions!

Moderators will be answering questions during the presentation, and some questions will be answered during the Live Q&A section at the end!

All other questions will be directly answered in the follow up materials.

How ready do you feel to run your lottery?

No Need To Panic!

- **Help Center**
  - "Prepare: Lottery Checklist" Article
- **WalkMe Tutorials**
- **Technical Support Team:**
  - Submit a ticket for our team with your questions.
- **Customer Experience Team:**
  - Still have questions? Connect with your assigned Customer Experience Manager for more information!

WalkMe
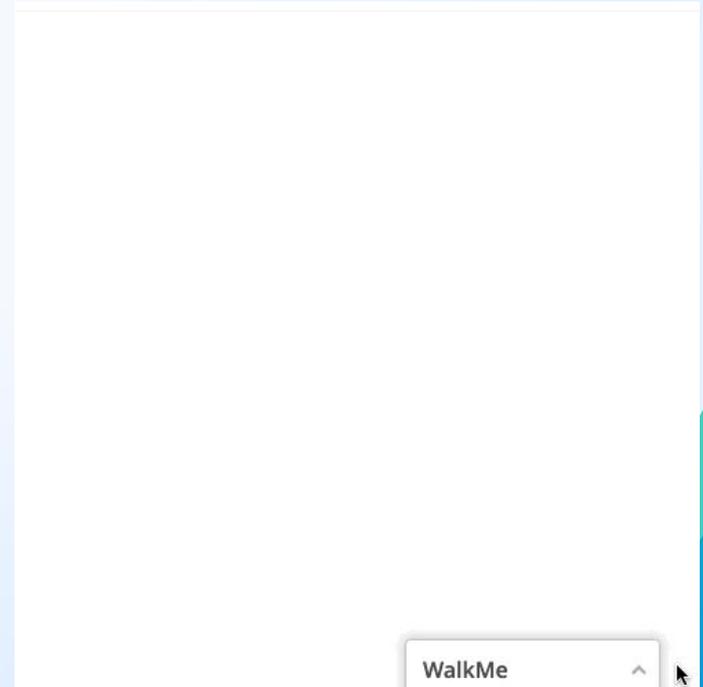
Lottery Configuration & Settings

Have you reviewed your lottery configurations and settings?

Lottery Configurations/Settings

- **Is Your Lottery Design Correct?**
  - Settings > Design And Build A Lottery
- **Are Your Calendar Dates Correct?**
  - Settings > Set Up Calendars And Dates
  - Check Your Open Enrollment Start/End Date
- **Do You Want To Enable Offer Expirations?**
  - Settings > Manage Offer Expirations

Lottery Configurations/Settings

- **Are Your Email/Text Message Notifications Updated?**
  - Settings > Manage Email/Text Message Templates
- **Are Your Custom Messages Updated?**
  - Settings > Manage Custom Messages
- **Are Your Decline Reasons Updated?**
  - Settings > Manage Discovery/Decline Reasons

Is Your Waitlist Dynamic?

Settings > Add & Manage Schools > Edit School > Set Individual Grade Preferences

Have You Set Your Open Seats?

Admissions > Open Seat Set Up

Grade	Budgeted	Current	Available
1	25	0	25
2	30	0	30
3	4	0	4
4	13	0	13
5	9	0	9
Total	81	0	81

Do You Need Additional Configurations?

Contact Your Customer Experience Manager For More Information

Run Bulk Lottery	**Bulk Publicize Lottery**	**Hide Lottery Results Fields**
	Run Multiple Lotteries	**Hide WL #s From Parents**

Processing Your Applications

How frequently do you process applications?

Steps To Process Applications

- **Age Inconsistent Applications**
  - Reports > Age/Grade Inconsistencies
- **Duplication Applications**
  - Reports > Duplicate Applications
- **Validate Priorities**
  - Admissions > Validate Priorities.
- **Lottery Readiness Dashboard**
  - Dashboards > Go Live Dashboard

Best Practices for Success

Spread It Out!

Set a schedule for processing applications throughout the year (weekly, bi-weekly monthly)

Plan Ahead!

Review lottery settings two months before and test your lottery once a week the month before.

Running The Lottery

Let's Do It Together!

REMINDER:

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

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

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
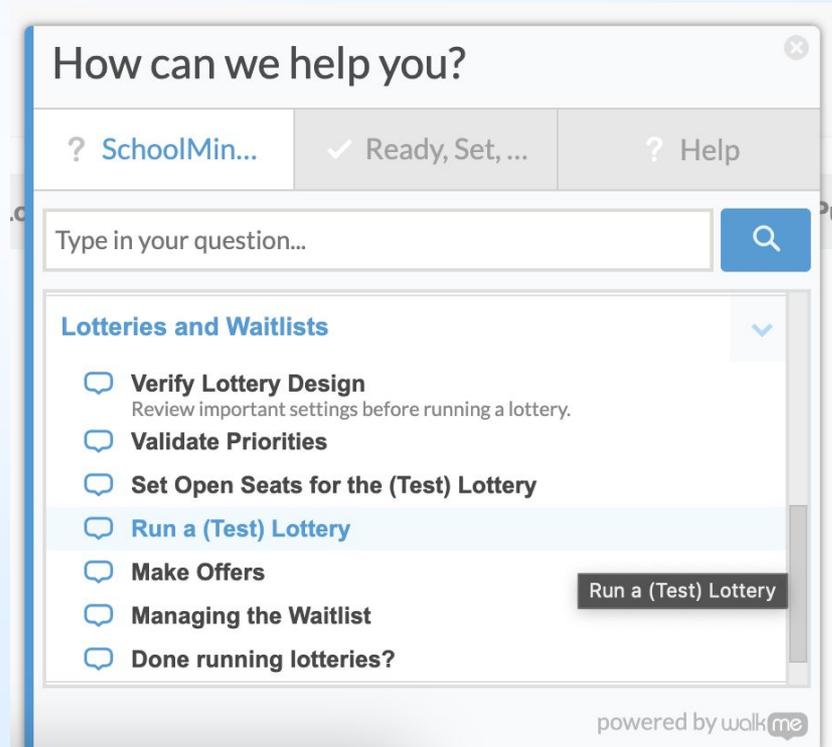
Admissions -> Lottery Dashboard
- Review / Update Open Seats
- Click "Run" lottery
- Review your lottery results - click "Current"

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

Manage Offers
- Accept, Decline or Rescind Offers

Share it out!
How excited are you
that you've just run a
lottery?

Keep Processing Applications!

- **Age Inconsistent Applications**
  - Reports > Age/Grade Inconsistencies
- **Duplication Applications**
  - Reports > Duplicate Applications
- **Validate Priorities**
  - Admissions > Validate Priorities.
- **Lottery Readiness Dashboard**
  - Dashboards > Go Live Dashboard

Managing Offer Progress

Admissions > Make Offers

Grade	Budgeted	Current	Available
k	50	50	0
1	43	40	3

Notifications On Offer Progress

Settings > Manage Email/Text Message Templates > Decline Offer

Send a copy of this email whenever a parent receives this notification. Some admins want to know when a student declines an offer, for example.

e.g. admissions@schoolmint.net

Making AdHoc Offers

Application Index > Select Student(s) > Bulk Actions

Export as CSV / XLS	Sort Records ▾	Select Bulk Action ▾				Fil

	Student Name	Grade		Email / Text Message	Mobile Number	SchoolMint Username	Status
☐				Send Set Password Message			
				Change School	**records selected.** Click here to undo this selection.		
				Change Grade			
☑	Lexie Yoder	5	Fo	Apply Priority	1231231234	fakeguardianemail1@testing.org	WL-1
☑	Franco Lam	5	Fo	Apply Student Tags	1231231234	fakeguardianemail1@testing.org	WL-2
				Add Note			
☐	Ashly Ramsey	5	Fo	Change Submission Date	1231231234	fakeguardianemail1@testing.org	WL-3
☐	Taniyah Murray	5	Fo	Move to Open-Enrollment	1231231234	fakeguardianemail1@testing.org	WL-4
				Move to Post-Enrollment			
☐	Adrian Griffin	5	Fo	Change Preferred Language	1231231234	fakeguardianemail1@testing.org	WL-5
				Cancel Applications			
☐	Armani Watson	5	Fo	Withdraw Applications	1231231234	fakeguardianemail1@testing.org	WL-6
				Make Offers			

Waitlist Order May Change!

Settings > Add & Manage Schools > Edit School > Set Individual Grade Preferences

Things To Double Check Before You Start Lottery

Things You Can Do!

Change Your Calendar Dates	Update Your Custom Messages	Update Your Decline Reasons	Validate Your Priorities
Enable Offer Expirations (If Wanted)	Update Your Email/Text Templates	Run Age/Grade Inconsistency Report	Test The Lottery In Sandbox 2-3 Times
Run Duplicate Applications Report	Run Your Lottery Readiness Dashboard	Check If Waitlist Should Be Dynamic (& How)	Make AdHoc Offers Off Of Waitlist

Things You Can Do With Your Customer Experience Manager!

Discuss Lottery Management Best Practices

Discuss App Processing Best Practices

Add Settings (Bulk Lottery, Hide WL #s)

Explain Your Lottery Design And Advise Alignment to Charter

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

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?

Questions & Answers

Q&A

- **When doing a practice run I opened 50 seats. I ran the lottery and it filled up the 50 seats with pre offers adn then wait list. When I went to offer one of the pre-offer I got a notification that I was over the amount of allowed seats, but that seat was supposed to be one of the 50**.
  - *Please send us some screenshots with more specifics via support@schoolmint.com! This will allow us to dive deeper into what you are seeing to troubleshoot.*
- **Will the lottery pull post enrollment application?**
  - *The lottery will only pull applications in Submitted status that were submitted during the Open Enrollment period (or have been marked as Open Enrollment manually.)*
- **How do I delete my ad hoc message templates?**
  - *Here is an article that details how to delete ad-hoc messages: https://schoolmint6.zendesk.com/hc/en-us/articles/208875366-Manage-Saving-and-Deleting-Non-Automatic-Ad-Hoc-Email-Templates*

Q&A

- **Can you review static vs dynamic?**
  - *With regards to the waitlist, static means that it does not change from the order that was established during the lottery (and new applicants will go onto the bottom). Dynamic means that the waitlist order will adapt to changing priorities/new applications and will adjust from the original waitlist.*
- **Do all lottery settings roll over every year? Or do we have to set this up every year?**
  - *Most settings do roll over! However, we do advise that you review all settings year to year to ensure that they are still aligned with your specific school policies.*
- **How will the lottery look when done publicly ?**
  - *It will look exactly like the demonstration provided, except families will be there! We do recommend contacting your Customer Experience Manager to discuss best practices on live lotteries as well.*

Q&A

- **What is a benefit and drawback of hiding waitlist #s with families?**
  - *Some schools have specific policies around this. However, we often hear our partners say that they generally do like to show waitlist numbers to families so families can see where they are in the waitlist. The drawback to this is - if you have prioriites that would move a student up on the waitlist, and as a result, move other applicants down, then for some families this can be confusing. For this case, some schools chose to hide the waitlist numbers to be able to message this more directly with families.*
- **Hello! I am new to Schoolmint and still in the implementation process for all of our schools. I do not have login information for our sandbox. Would you be able to help me with this?**
  - *Click the "WalkMe" button at the bottom of your screen when logged in, and you'll see an option for "Take me to Sandbox". You'll use your same username and password to log into the Sandbox as what exists for your production site.*
- **What does it mean if under lottery there the section is blank?**
  - *You may need to select a school first. Try and select a school, and then see if that shows the information in the Lottery Dashboard.*

Q&A

- **What is a benefit and drawback of hiding waitlist #s with families?**
  - *Some schools have specific policies around this. However, we often hear our partners say that they generally do like to show waitlist numbers to families so families can see where they are in the waitlist. The drawback to this is - if you have prioriites that would move a student up on the waitlist, and as a result, move other applicants down, then for some families this can be confusing. For this case, some schools chose to hide the waitlist numbers to be able to message this more directly with families.*
- **Hello! I am new to Schoolmint and still in the implementation process for all of our schools. I do not have login information for our sandbox. Would you be able to help me with this?**
  - *Click the "WalkMe" button at the bottom of your screen when logged in, and you'll see an option for "Take me to Sandbox". You'll use your same username and password to log into the Sandbox as what exists for your production site.*
- **What does it mean if under lottery there the section is blank?**
  - *You may need to select a school first. Try and select a school, and then see if that shows the information in the Lottery Dashboard.*

Q&A

- **Do families get notifiied if they were not selected for a seat nor the waitlist?**
    - *Yes! When you publicize your offers with notification, both the "Make Offer" and "Publicize Waitlist" notification will be sent to families.*
- **How do we reset the lottery in the sandbox?**
    - *Sandbox will reset nightly. If you need a reset earlier, please feel free to reach out to support@schoolmint.com to request it!*

Thank You!