SchoolSpeak ™
Using Registration and Application Forms in SchoolSpeak

SchoolSpeak Support – January 2019

communitybrands

Overview

- Brief Overview
- Important reminders
- Checklist

Reminder of Terms

- Registration – Confirmation that the student is going to return to the school for the next school year. The "reg" form may include tuition options, terms and conditions and may ask for a fee.
    - The family is typically already entered into SchoolSpeak.
    - May also be called enrollment or re-enrollment

- Application/Admission – A new family is applying for student admission to the school.
    - The family is not yet a part of your SchoolSpeak account.
    - The information gathered in an application may be added to the parent/student profiles - as long as there is a field in both places.

- Profile Update – The profile is the contact sheet for the member. A profile update is where a parent/guardian walks through the profiles to complete, update or verify the fields.
    - Parents/guardians can tyically see/edit their children's profiles

3

Brief form overview

Resource Type - Form

- Used for registrations (school and clubs/teams), applications, contact us, surveys, donations, purchases (Note cards, team apparel, candy grams)
- Can add custom fields for parents to complete
  - Many types of fields
  - Can make certain fields mandatory
- Payments can be assessed either as a constant amount, calculated amount or amount based on time frame
  - Payments may be accepted as cash, check or online payment Diamond mine
- Forms can be only for SchoolSpeak families or made public for use on a public website

Home Page – Messages and instructions

Registration form 2019-2020 ⚹ Settings   ⚹ Admin

🔍 Query Records

Thank you for registering your students at Homestead School. We are looking forward to a new year of academic growth.

Please complete and submit Registration Form.

To begin please click **NEXT** and complete the fields. Required fields are noted by *.

When complete, please review the form and click the **SUBMIT** button.

If you have any questions, please contact the school office.

Next

6

3

Settings – Customize per form use

Instructions:

Short message to appear on the home page:

Registration Form

Instructions to be shown on forms home page: *(Optional)*

Thank you for registering your students at Homestead School. We are looking forward to a new year of academic growth.

Please complete and submit Registration Form.

To begin please click **NEXT** and complete the fields. Required fields are noted by *.

When complete, please review the form and click the **SUBMIT** button.

If you have any questions, please contact the school office.

Normal | HTML | Preview | <div>   Words:62 Characters:468

Detailed instructions to users on how to fill the form: *(Optional)*

Paragraph | Default Font | Size | Zoom

Normal | HTML | Preview   Words:0 Characters:0

Post submission instructions to users: *(Optional)*

Thank you for registering with our school.

[+] Instructions

Configurations:

Start Date:	01/17/2019	Time: 12:00 AM (hh:mm PM)
Due Date:	01/24/2020	Time: 12:00 AM (hh:mm PM)

Allow Visitors?   ○ Yes ● No

Mandate Login?   ● Yes ○ No

Can user create records?   ● Yes ○ No

Number of Records per user?   ☐ (0 - user cannot create records; records should be preloaded. Leave this field empty if user can submit any number of records.)

Can user edit records after submitting?   ○ Yes ○ No

Can user edit records after due date?   ○ Yes ○ No

Can user delete Records?   ● Yes ○ No

Send Email Notification?   ○ Yes ● No

Does each record in this form correspond to a user?   ○ Yes ● No

Records can be edited by: ☐ Self   ☐ Parent   ☐ Child   ☐ CoGuardian
(If none selected 'self' is assumed)

Associate Form To User Profile?   ○ Yes ● No

^Enable Member/Family Add   ● Yes ○ No

Delete non submitted records while purging: ○ Yes ● No

[Update] [Cancel]

7

Parent Input

1 2 3   [👓 Review]   [Next ➜]

[Edit this Section]

Please identify the students that will be enrolling for the next school year

If you are a current family and would like add a new student to Homestead School, please add the child in the new st

Family Name *

Student 1 Name *

Please Select ▼

Student 2 Name

Please Select ▼

Student 3 Name

Please Select ▼

Student 4 Name

8

Review and Submit – Parent review their input and submit the form

9

Query records – Admins may see all records both in edit mode and submitted. May also use Office only section and add new families.

10

Registration

11

Let's look at the typical registration process

Contact
Forms

Payment

Registered

Tuition
Terms

12
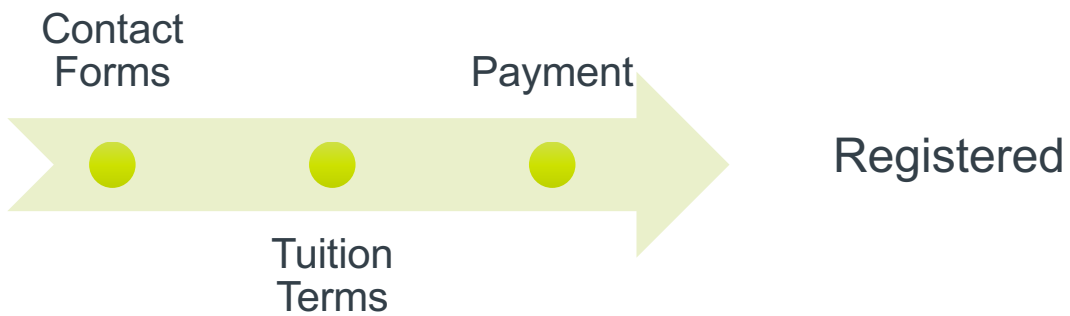
Let's take a look

- Registration
    - Your school may have a process with lots of papers for parents to complete
        - Emergency Contact
        - Basic Contact – Name, Address, DOB, Phone
        - Doctor/Dentist information
        - Tuition terms agreement
        - Payment plan identification
        - Media/internet release

    - Result – LOTS and lots of paper, binders, and excel spreadsheets
    - There has to be an easier way

    - Hint – *Think SchoolSpeak*

13

Goal of registration

- Are your students returning?
- Are you adding a new child?
- Do you agree to the tuition terms?

- Need the solution to emphasize
    - Simplicity - Need to keep process simple, parents don't want to spend a lot of time doing paperwork
    - Don't reinvent the wheel - Leverage the work you already have done in SchoolSpeak
    - Easy for admins - Let's make it easy for admins to track the progress of families
    - Reduce the work load – The registrar has a lot to do – don't need spend time on data entry!

14

So let's break it down

- How can we reduce the amount of work for parents and admins?
  - Leverage the member profile!
    - Can store the contact information, emergency contacts, medical information, media/internet releases

  - If we rely on the member profile to capture important member information then we don't need to use so much paper

The result – Registration becomes even simpler!

15

A new potential process – Parent Actions

Profile Update	→	Agree to terms in form	→	Pay (optional)

- No Paper for parents (or input for admins ☺)
- Tuition terms acceptance is accessible in form on SchoolSpeak (easier for bookkeeper ☺)
- May configure SchoolSpeak to accept payment

16

What about current families adding new students?

- Add a small section in registration form to allow parents to add new student's name, grade level, DOB and gender.
  - May also want to ask about any health or education concerns

- Why not use the admission form?
  - Optional for school
  - Most principals/staff know the family due to the older students
  - Already have much of the family data in SchoolSpeak
  - Keep it simple for the parents

- Use Add Family to add the new student to the current family

17

One more term before we begin

- Landing page
  - Resource – Web page
  - Provides instructions to parents on the registration process
    - Message from principal
    - Steps in the process
    - Additional items required
    - Kick off registration

18

Time for SchoolSpeak

The Registration Form

The Process

New Trend Reg without Profile Update

A change – from the schools

- Make registration faster and easier on the parent
- No profile update at this time
    - Will start a profile update before school begins as information changes
    - Create reasons for parents to log in at beginning of school
    - Especially nice if the parents have already started completing profiles already

Applications/Admission

Applications

- Need to obtain parent contact information
- Student information
  - Name, Grade level, DOB, gender, any special medical/health concerns
- Any other information that helps to make a decision about admission
  - Parish
  - Current family

- But remember the profile update…don't need to ask for everything now because you can have parent do the profile update later!

How to add the new family to SchoolSpeak?

- The form will be enabled to add families to SchoolSpeak
- Important fields will be mapped to profile fields
    - Parent name ---→ parent name in profile
    - Address --> Address in profile
    - Student name --> student name
- Use add family from the More options link in the form
- Fields will be auto-filled
- Any other information from form can be mapped into the profile (as long as fields exist)
- REMEMBER when adding new families to SchoolSpeak do NOT put them into current groups – will affect reporting
    - Use groups like New Families 2019-2020, New 1, New 2, New 3

25

What about tuition? Term agreements?

- Use the current registration form
- Once you accept the new family and add to SchoolSpeak the new family can use the registration process that current families use
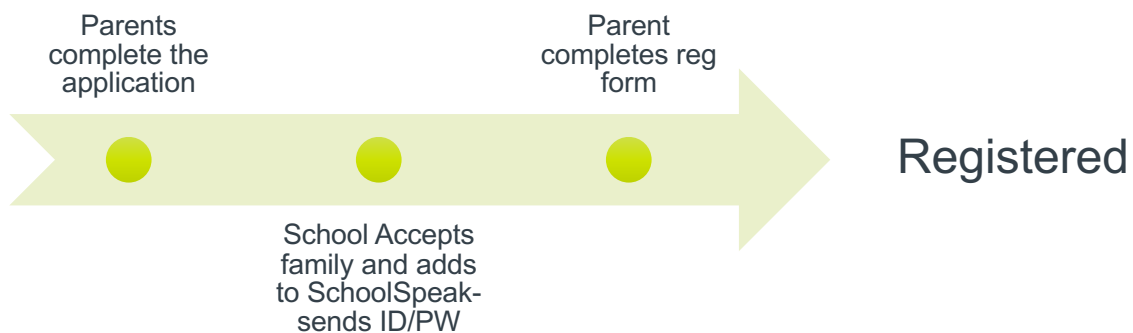   - Benefit – all tuition questions are answered in one resource

26

Make accessible from public website

- Can make certain SchoolSpeak resources public
- Ask support to turn the master account field to allow some information to be public
- On the Forms resource Admin page – Click to make public
- Copy the URL of form homepage or landing page and give to your web master to add the URL

- To test - Copy the URL and go to a browser that you have not logged into SchoolSpeak with today
  - Recommend to have a couple of browsers on your computer

27

Possible application process

Parents complete the application

Parent completes reg form

Registered

School Accepts family and adds to SchoolSpeak- sends ID/PW

28

14

How to track registered?

- Take advantage of Re-enrollment resource
- Use the tool to add fields to the student profile
- Go to the student profile and hide the fields from parents
- As student registration is finalized, update the field in the student profile
- Use the report to track your school's progress

29

Ok…what should I do?

- Let's add registration and application forms to your school (call support)
  - Easier to edit a pre-existing then start from scratch ☺
- Create the groups New 1, New 2 …and new families 2019-2020
- Decide – do I want to do the profile update now?
- Customize terms and conditions, instructions and information
- If you are going to do the profile update now – look at your profiles – are there any changes that need to be done? Make a list and contact support!
- Test
- Go live!
- Eat some chocolate – maybe that should be step #1 ☺

30

You can do this!
And we can help!

Contact Support to
setup a time
support@schoolspeak.com
877-773-2513

31