



SchoolSpeak ™  
**Re-Using Registration  
and Application Forms in  
SchoolSpeak**

For Schools that have used forms in the past

SchoolSpeak Support – January 2019



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## Reduce, Reuse and Recycle

- To quote Bob the Builder

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## 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 typically see/edit their children's profiles



Biggest Trend

*Simplicity*

Make it easy for parents to apply and register



## New Trends in Registration

Reg without Profile Update

New students for current families added in reg form

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## A new potential process – Parent Actions

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

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## 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

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## 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

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## 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



## New Trend in Applications/Admission

## Applications – Trend Update

- Make it as simple as possible!
  - 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!
  - Tuition Information??
- Requiring parents to make an ID/PW before hand?
  - No necessary- can change form to allow visitors without requiring login
  - Make sure that the form is public

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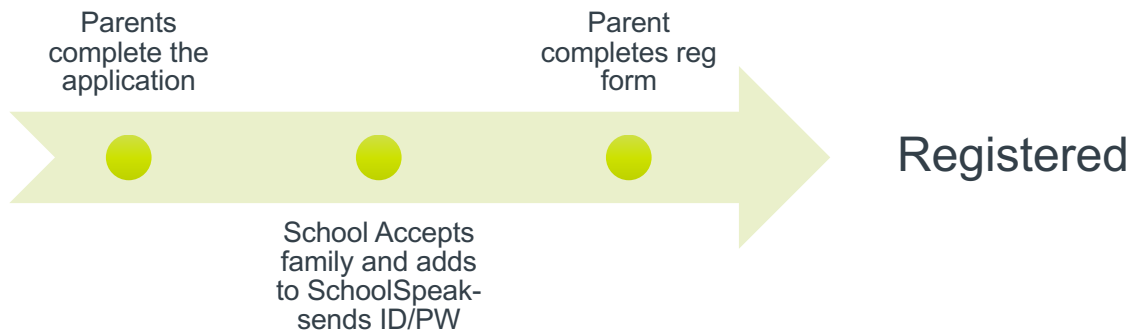
## How to register a new family

- Option - Can have the parent agree to terms in application form
  - Pro – They are done
  - Con – 2 resources have tuition info
- Option – Have the parents apply -> admins accept and add to SchoolSpeak -> New families can use the same process as current families
  - Pro – Families can be pushed into profile update, can use the same reg form as the rest of current families – all information in one place
  - Con – 2 steps

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## Possible application process



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## General Form Suggestions

- Number of pages
  - Try to keep the number of pages to a minimum
  - Can put multiple sections on one page – Edit sections
- For registration forms
  - Consider using a field type called SchoolSpeak member
  - Allows parents to use a dropdown instead of typing in the student names
  - Can use for new families if you add them after application before they reg

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## Let's Begin

Getting current forms ready for the new year

## Things to do before we start

- Review your profiles
  - Do you need to add any new fields?
  - Do you need to change any fields?
    - Make mandatory
    - Make not mandatory
  - Look at Parent and student profiles
  - What about the teacher profiles?
    - Emergency contacts
    - NCEA fields





## Decision Time

Use the same resources or copy to a new resource

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## Why do should I copy?

- Usually forms don't change too much year to year
  - Can modify the new one
- Parents are usually asked to agree to terms – keeping the old forms allows you to continue to access them
- Schools may still be accepting students for the current year – continue to use the current form
- We are taking advantage of all of the work that has been done before

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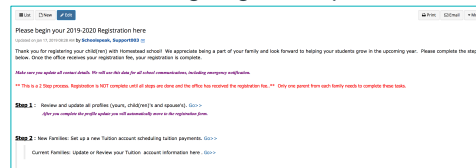
# How do I copy?

Call Support for a quick resource copy  
But have a list of what to copy

## List for copying

- Landing pages?
  - \*a page for parents to see instructions and messages
  - Did you have one for registration?
  - Did you have one for applications?
  - If you still have families applying and reg'ing for this year – make copies
  - If done with this year – can reuse!
- Copy Registration and Application
- Tell support what the resources are called and what to call it

### Landing Page Example



### Form Preview Example

[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 to add a new student to Homestead School, please add the child in the new student section below*

Family Name: \_\_\_\_\_ \*

Student 1 Name: \_\_\_\_\_ \*

Student 2 Name: \_\_\_\_\_

Student 3 Name: \_\_\_\_\_

Student 4 Name: \_\_\_\_\_

**New Students**

*If you are a current family and would like to enroll a new student for our school, please complete the New Student fields.*

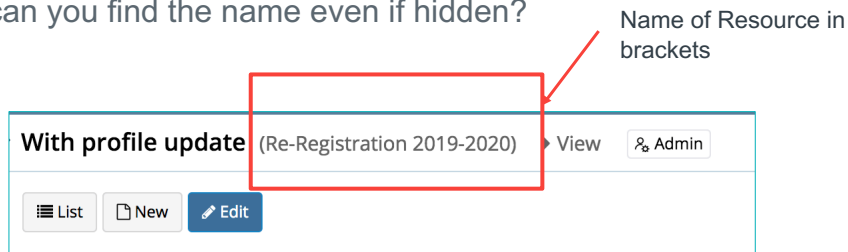
New Student 1 Name: \_\_\_\_\_

Grade Level for 2019-2020: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ (MM-DD-YYYY)

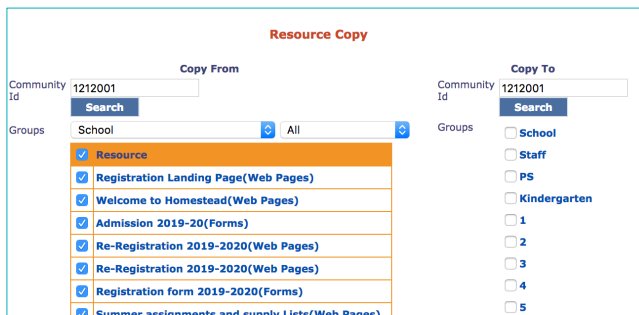
## What the resources are called?

- Often the forms may be hidden from the quick links section of your school group
- Go through last year's process and note the names of the resources as you do the steps
  - Where can you find the name even if hidden?



## Why is this important? What does Support do?

- Support has a copy tool that allows us to copy the resource to any group but we need to know the names of the resources



No, the tool is not available to admins ☹️

## The official checklist

*If using a copied forms/landing pages – do the steps on the new versions*



*If using old resources – download PDF versions of parent responses for backup*

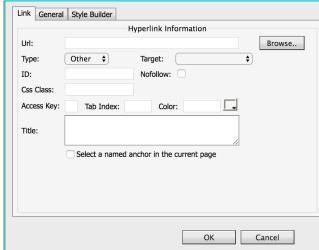
- Forms – Query Records
  - Delete all old records – otherwise parents will see form from last year
- Forms – Admin
  - Purge all old records as of today's date
- Forms – Settings Page - Configuration
  - Review the dates of the form
- Forms – Settings page – Payments
  - If your form accepts payments make sure that the dates are updated
- Forms – Settings Page – Instructions
  - Review the instructions text boxes. Update any dates and text that you may see (remember to click Update)

## The official checklist - Continued

- Forms – Edit button
  - **Update text on the form** – including
    - Names of fields if “years” were included in field names
    - Tuition rates
    - Terms and conditions
    - Dates
    - *Recommend printing the form to see any areas. A second set of eyes is helpful.*
    - Add/update any new fields that you may need
- Resource names – Make sure to update years if included in name
- Landing Page
  - Verify the text to ensure dates have been updated – Click EDIT to change
  - Make sure that Instructions are still valid
  - Verify that the Links are correct !!
    - If you asked for a landing page to be copied or a form to be copied the links are still pointing to the old form – they must be updated!! Otherwise parents go to the old forms.

## How to update HTML links in a landing page

- Link type – to another resource
  - Go to the resource or website that you would like to link to
    - In this case locate the new form
    - Go to the address bar and highlight the address – click to copy
  - Go to the resource you are asking the parent to click – the from point
    - Click EDIT
    - Highlight the current link
    - Click unlink icon 
  - Click on Link icon 
  - Put cursor into the URL field and paste the new link
  - Click OK



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## How to update the Profile update link

- If your school is also doing a profile update in conjunction with the form you will need to update the link.
- Go to the form that you want to link to
- In the URL line copy the link
- Goto ADMIN -> Configure System -> Custom Messages
- Scroll to bottom and locate Generate Address of Profile Page
- Paste the URL you copied
- Click Generate
- Copy the new generated URL
- Go back to your landing page and update the Link using the instructions on prior slide

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## Checklist Continued

- Update public website links
  - If you linked the form to your public website – you will need to update the links to the new forms/landing pages
  - Go to the landing page and copy the URL in the URL field
  - Change link on website or send to your webmaster
- Clear the **NEW** groups for last year and either clear **New Family** group or create a New Family 2019-2020
  - If you added resources to the *old* New Family group should add links/resources to the *new* New Family group
- If using the returning students report – make sure to **clear the field** from last year using Manage Members
- Make sure that the old forms/landing pages are offline or not in Quick links view
- Test the process
- Grab a cocoa! You deserve it! 😊

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You can do this!  
And we can help!

Contact Support to  
setup a time  
[support@schoolspeak.com](mailto:support@schoolspeak.com)  
877-773-2513

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## Brief form overview

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## 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

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# Home Page – Messages and instructions

Registration form 2019-2020 [Settings](#) [Admin](#)

[Q 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](#)

# 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.

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

**Post submission instructions to users: (Optional)**

Thank you for registering with our school.

**[+] Instructions**

**Configurations:**

Start Date:  Time:  (hh:mm PM)

Due Date:  Time:  (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](#)



# 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 student section.*

Family Name \*

Student 1 Name \*  
Please Select

Student 2 Name  
Please Select

Student 3 Name  
Please Select

Student 4 Name