


Introduction to Forms in SchoolSpeak

SchoolSpeak Support –2020



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Trends

- Schools are looking for ways to allow parents to apply and register online
- Parents are expecting online options at their schools
- Principals have shared that the process should be simple and quick
- The principal and registrar need basic information to have conversation with families
 - Ask the important questions to decide if there is a good fit for student and school

New Standard Templates

- New application and registration templates
 - Most common items asked for by schools
 - Easy and fast implementation
 - Schools can customize fields and sections
- SchoolSpeak Support can add to your account
- Then you can start having fun!!!

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Forms

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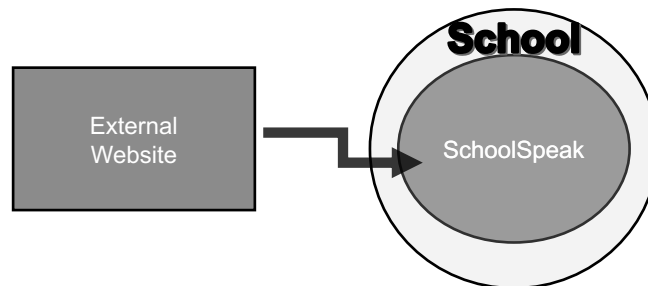
Application Form

- Used for new families that are not currently in SchoolSpeak
- Ask for contact information
 - Student name and contact information
 - Parent/Guardian contact information
 - Basic questions
 - What do you need to know to assess students and communicate
- Form can send the information added directly to the profile when correctly setup!
- What we don't ask on application
 - Emergency contacts
 - Doctor/Dentist
 - Releases – Photo, internet, medical
 - USE THE PROFILES

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Forms can be accessible to general public

- Schools can enable the application to be accessed without a SchoolSpeak ID and password
- Contact support to enable sharing of resources



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6

Registration Form

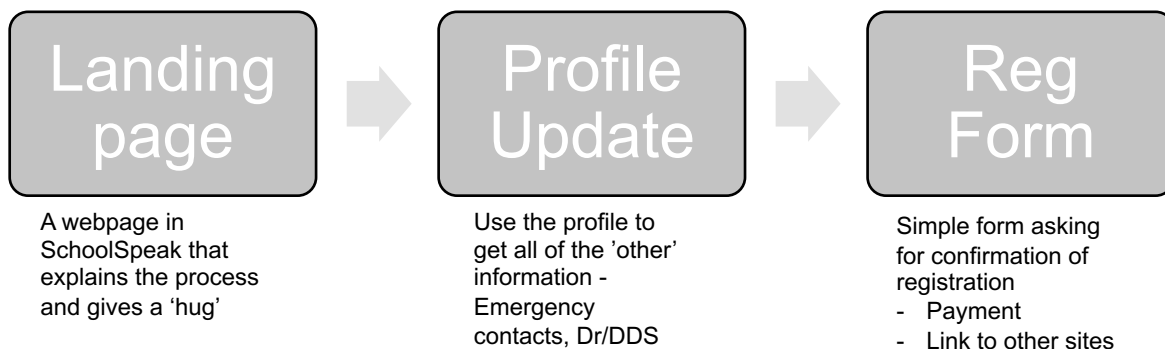
- Use the fact that they are part of SchoolSpeak to our advantage
 - Able to access names from SchoolSpeak
- Typical things that may be included
 - Grade level
 - Questions about PS levels
 - After care/before care
 - Agreement to service requirements
 - Agreement to contract terms
- Ask if there is a new student to add to family
 - If yes, can use ADD FAMILY to bring student data with existing parent option!
- **USE THE PROFILE!**

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7

Possible workflows – Registration Current

Parent clicks on landing page and then as admins we setup the rest to flow smoothly. We don't want the parent to have to click a lot!



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8



Example

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Possible workflows – Registration No Profile update now do later in summer

Landing
page

A webpage in SchoolSpeak that explains the process and gives a 'hug'



Reg
Form

Simple form asking for confirmation of registration

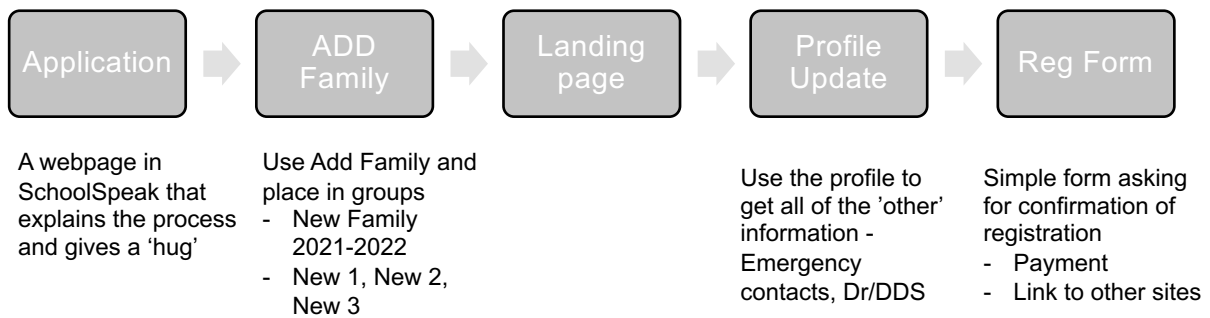
- Payment
- Link to other sites

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10

Possible workflows – Registration New Families

Once added to SchoolSpeak new families can follow the same procedure as current families



Let's talk about Customization!



Forms can be easily created and
maintained by the school

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13



This is your form!
Modify how it behaves
Change the instructions
Change/add fields

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Basic components

- Settings
 - Instructions
 - Home page message – How to use the form
 - Detailed instructions
 - Post Submission message
 - Configurations
 - How do you want the form to behave
- Payment

[+] Instructions
 [+] Configuration
 [+] Payment

Instructions:

Short message to appear on the home page:
 New students for 2020-2021, apply here early for priority admission

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

Thank you for your interest in Homestead School. We look forward to a new year with your students.

Online applications will close on June 30th, 2021

Click NEXT to begin the application

If you have any questions please contact the school office.

Words:42 Characters:262

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

Words:0 Characters:0

Post submission instructions to users: (Optional)

Thank you for your application. We will contact you shortly.

Words:10 Characters:60

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Basic components

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- Payment

[+] Instructions
 [+] Configuration
 [+] Payment

Configurations:

Start Date: 10/28/2013 Time: 09:15 AM (hh:mm PM)

Due Date: 6/30/2099 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

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Configuring a form – Settings >> Configuration

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

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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

Start Date – Form data entry begins
Due Date – Form data entry ends
 **Mind the format for time

Allow visitors – Yes – form may be made accessible to people outside of SchoolSpeak
 No- People only with ID/PW

Mandate Login – Yes – ONLY with ID/PW
 * Public forms will require people to add an ID and PW
 No – All can add to a form

Can user create records – Yes/No
Number of records per user – Blank = Unlimited
 0 = No records
 # = Limited to that number

Can user edit records after submitting? - Yes/No
Can user edit records after due date? Yes/No
Can user delete records? Yes/No

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

Send email notifications? Yes/No
Does each record in this form correspond to a user? Yes, NO
Records can be edited by: Self, Parent, Child and Co-guardian
Associate form to User Profile? Yes/No
Enable member/family Add – Support function
Delete non submitted records while purging – Yes/ No

Basic components

- Settings
 - Instructions
 - Home page message – How to use the form
 - Detailed instructions
 - Post Submission message
 - Configurations
 - How do you want the form to behave
- Payment

[+] Instructions

[+] Configuration

[+] Payment

Payment:

Form accepts payment: Yes No

Payment amount: Fixed Take from field Calculate using formula

250.00

Delete unpaid records while purging: Yes No

Payment page instructions: (Optional)

YOUR APPLICATION IS NOT COMPLETE UNTIL PAYMENT HAS BEEN SUBMITTED.

Update Cancel

Payment Configuration:

Show 'I will pay later' button: **No**

Allow partial payment: **No**

Allow payment more than due amount: **No**

Payment Type	Processor	Parameters
PayPal	PayPal	Email: dennis@schoolspeak.com

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Application – After installation

- Customize messages
- Customize the configuration settings
 - Allow visitor to yes!
 - Mandate login - no
- Verify that the resource is available without login
 - Click Admin on resource
- Make sure account setting is allowing Resources to accessible without login
- Try it out – copy URL to another browser
- Ask someone else to test!

Allow Visitors? Yes No

Mandate Login? Yes No

Modify this resource:

Link name:

Update link name in all resources linked

Description:

Accessible without login: Yes No

Include in summary email

Status: Online Offline

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Registration – After installation

- Customize messages
- Make sure online when ready
- Verify links from landing page
- If want profile update – use custom messages
 - Copy form URL
 - Admin – Custom messages – Generate
 - Copy code back to link on form
- Ask someone else to test!

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Sections

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23

Sections

- Use sections to group related fields together
- Sections have power!
 - Can user see the section?
 - If they can't see the section, they can't see the fields
 - Make an office use only section! But hide from parents
 - Track status of form
 - Accepted, waitlist
 - Forms collected – Birth certificate, medical form
 - Process – Tour, meet principal, testing
 - Do you want the sections on same page
 - Multiple page forms can be scary to parent
 - Printing sections

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Add/Modify Section :

Show fields in section: **Add/Edit Section to sections.)**

Add/Modify Section

Section Name: * (Section name will not be shown in the form data input page.)

Section Heading: (Section heading will be shown in the form data input page.)

Visible: Yes No

Page: Start on new page Continue below previous section

Print: Start on new page Continue below previous section Do not print

Section Name	Page Number	Edit	Edit Fields	Delete	↑	↓
Student Information	1	Edit	Edit Fields	Delete	↓	↓
Parent Information	2	Edit	Edit Fields	Delete	↑	↓
Authorization	2	Edit	Edit Fields	Delete	↑	↑

Add/Modify Section

Section Name: * (Section name will not be shown in the form data input page.)

Section Heading: (Section heading will be shown in the form data input page.)

Visible: Yes No

Page: Start on new page Continue below previous section

Print: Start on new page Continue below previous section Do not print

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24



Let's talk about Fields

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25

What is a field?

- A way for a parent to input data
- Don't need to be a programmer to add/change a field in SchoolSpeak!
- Examples

Applicant Information We request that the following children be admitted for the 2020-2021 School Year:	Heading/Comment	Great way to give information-divide sections
Student 1 Name * <input type="text"/> <input type="text"/> <input type="text"/> First Name * Middle Name Last Name *	Text Box	Parents can complete the fields
Gender * <input type="radio"/> Male <input type="radio"/> Female	RadioButtonList	Give people options to choose
Date of Birth * Sept 1st is the birthday cut off for grade placement. <input type="text"/> - <input type="text"/> - <input type="text"/> MM * DD * YYYY *	Preformatted Date field	Formatted options that help data entry
Grade, Fall of 2020 * <input type="text" value="Please Select"/>	Drop Down Box	Give people specific options to choose

Field will appear as:
Public School Child Would Attend

Field properties:
 Size: 100 (Maximum number of characters the field can accept. Value zero means no limit.)
 Width: 50 (Length of the textbox in number of characters.)
 Height: 1 (The height of the textbox in number of lines)

Name of the Field: Public School Child Would Attend
 Reference Name: S1Default-Public School student Show

Do not show name on the form:

Help Information on this field:

Do not show Help:
 Hide this field from user?:
 Do not allow user to edit this field:
 Make this field Mandatory?
 Show this field in Summary?

Print Options:
 Include this field in printout: Yes No
 Include help text in printout
 Do not print if field is empty

Field properties – Determine how field works

Name of Field – Displays on forms

Reference Name – Internal name also may allow linking to profile

Help Information – Will display on the forms great way to give extra help!

Hide this field – Don't show to user – admin will see

Do not allow user to edit – Parents can see but not edit

Make this field mandatory – Parents must do
 - Use when necessary a * displays

Show this field in summary - Shows field in query record dashboard

Common changes on fields

- Name of the field
- Mandatory
- Help!
- Show as summary field

- Why help?
 - Forms are easy and basic
 - Help gives parents a little more detail on what you want them to do

Add a new field

The screenshot shows a form editor interface. On the left, there is a table with the following content:

Field Name
Applicant Information
Student 1 Name
Gender
Date of Birth
Grade, Fall of 2020

On the right, a dropdown menu is open, showing the following options:

- ✓ Please Select
- Name
- Address
- Email
- Telephone
- Heading/Comments
- SSN
- Gender
- Date Time
- SchoolSpeak Member
- Signature
- Text Field
- Number
- Drop down
- List box
- Check Box
- Check Box List
- Radio Button List

1. Choose the field type
2. Add a name
3. If it is field with options – add options
4. Decide on appropriate properties
5. Click Update!

Look at other fields in the form for examples

Think about a CSV file – each field represents a column in XLS or spreadsheet application. The field choice will determine what you see!

If you use a drop down box, all answers will appear in 1 column.

If you would like multiple columns – make a field for each question



FAQ's

Troubleshooting your form

Common Issues – No one can see the form

Check:

- Is the form online?
 - Do you see a ! Next to form name?
 - Click Admin on form and confirm it is online

- Is the link available?
 - If you as admin do not see the link then the form link has been turned off
 - Group Admin
 - Manage resources
 - Edit link and content
 - Check link box

Common Issues – “Next” button is missing

Check:

- Are the form dates current?
 - Settings
 - Configuration
 - Look at dates
 - Change dates
 - Click Update
- Did the parent already start a form?
 - If the parent already started a form, the next button will not appear if you have limited the number of forms the parent can do

Common Issues – My application form shows anonymous and I have no idea who filled out the form

Check:

- This is expected when you link a form to your external website and people do not have to complete a ID/PW page
- Go to your form and edit the properties of important fields
- For parent 1 (at least) choose to make it a summary field

Common Issues – The payment says no valid dates

Check:

- When using a calculated payment there are dates that the calculation is valid.
 - Settings
 - Payment
 - Edit the formula and update the dates
 - Click update!!!

Common Issues – The field is wrong on form- can I change?

You can BUT!

- If parents have already begun to add data in the old field do not delete.
- Use field properties to hide field
- Add new one

Common Issues – Data is not being added to profile

Check-

- Does the field in the form map to a profile field if the field is in profile
 - If not, map the field
- If you need that field – make it mandatory on form!

Common Issues – Form won't let parents submit

Check-

- Usually a mandatory field issue – did the parent complete all of the fields?
- May have too many fields mandatory
 - Due to diverse families may only have 1 parent then cannot make parent 2 information mandatory
 - Only make student 1 mandatory (but don't have to have all fields mandatory)

Common Issues – A lot of records say Being Edited

Usually means parent has forgotten to click SUBMIT. This is user experience issue.

- The form is easy! It is the navigation that is an issue.
 - Add text to form home page – Click **SUBMIT** when done
 - Add a comment/header to end of form
 - “When you are ready, click REVIEW and then **SUBMIT**”.



Open Questions

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39



Videos and Help Sheets are available

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Thank you.

Contact SchoolSpeak Support
Via Online Chat or Email

When sending an email put as much
information as possible in email.

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