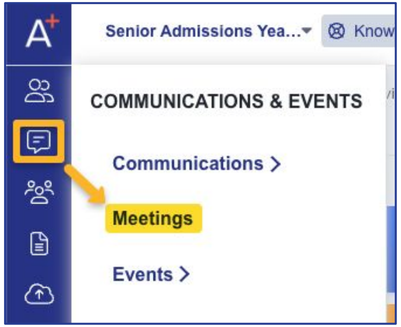
Admissions+

Meetings & Concessions

Meetings

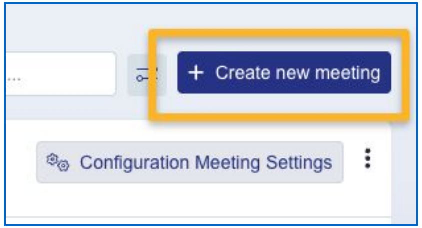
1. Setting up a meeting
2. Adding applicants to application groups
3. Inviting applicants to meetings
4. Tracking responses to invitations
5. Conducting your meetings

Setting up a Meeting

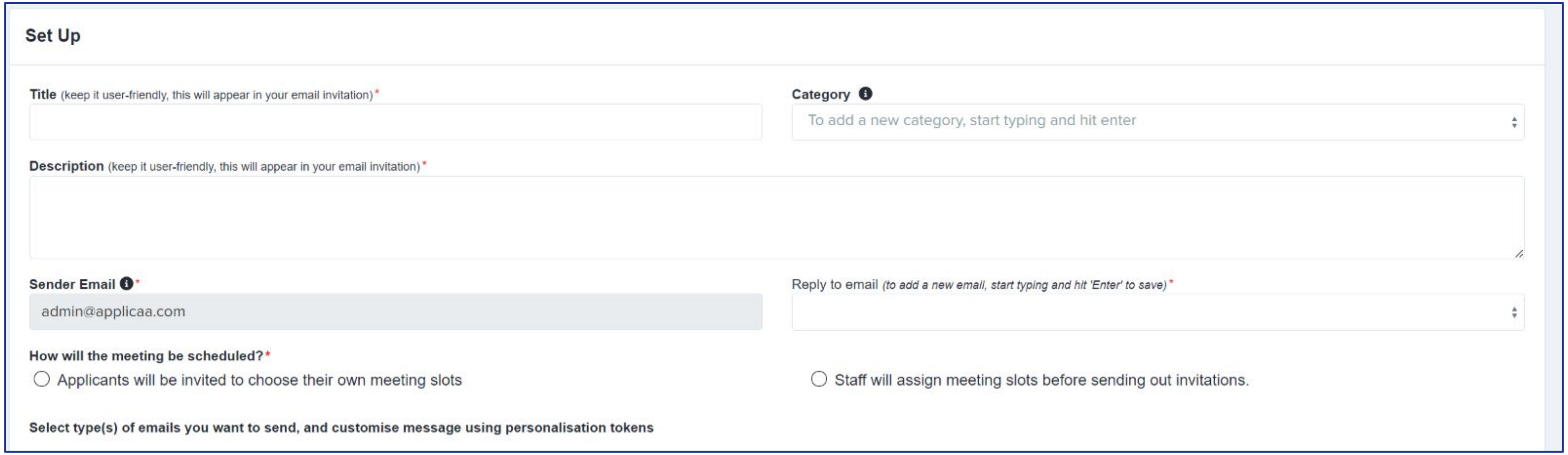


Communications & Events > Meetings

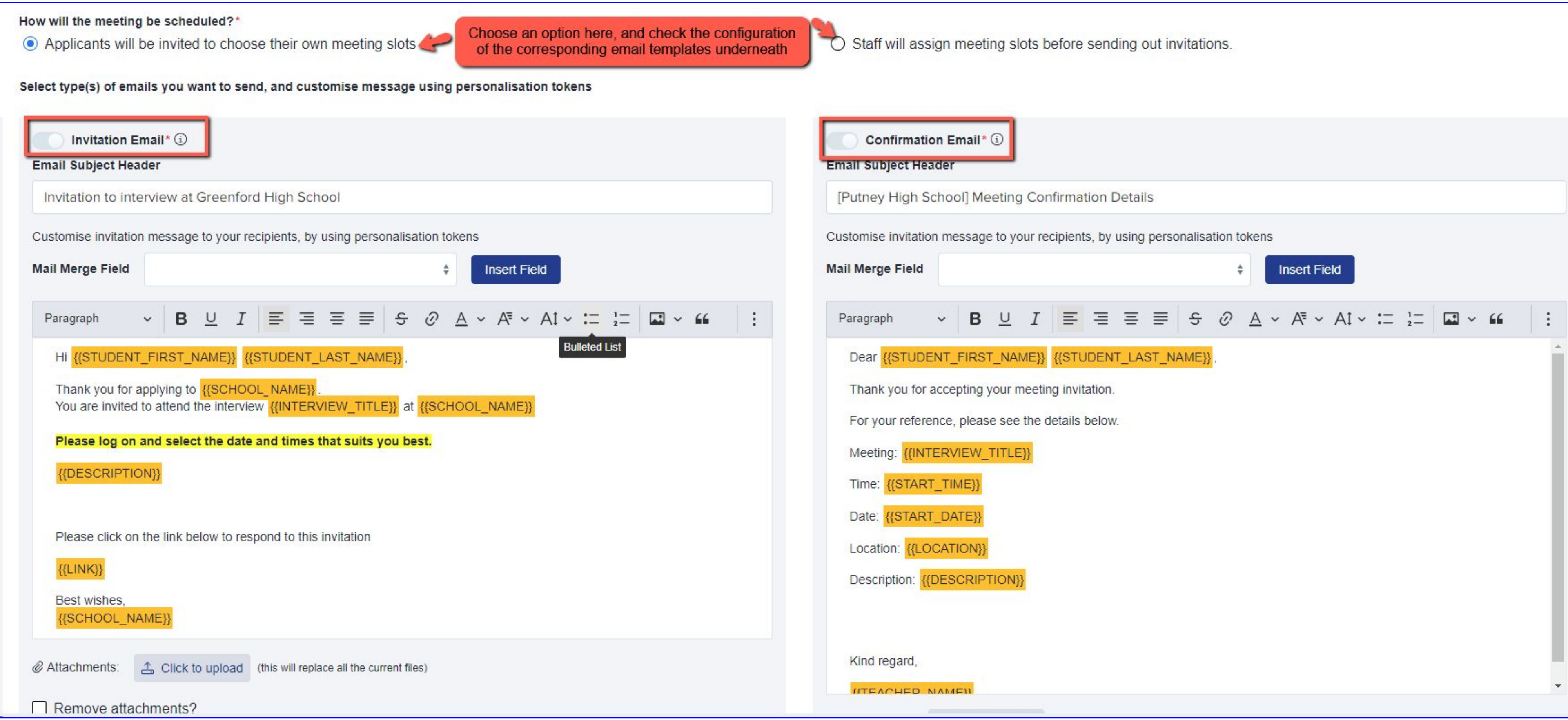
Click the ***"Create new meeting"*** button



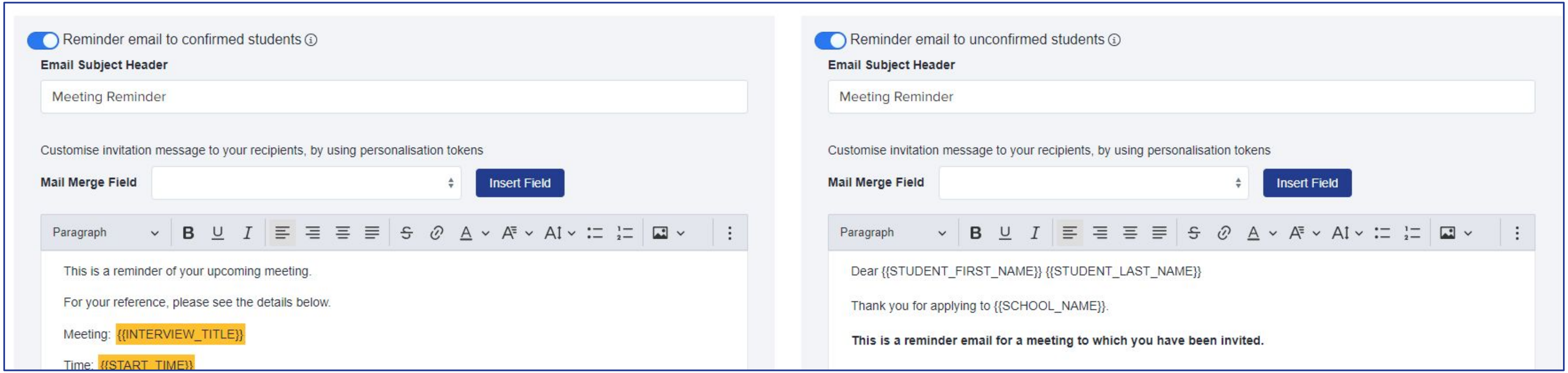
Complete the Set Up step by adding the title and description of the meeting, as well as deciding how the meeting will be scheduled



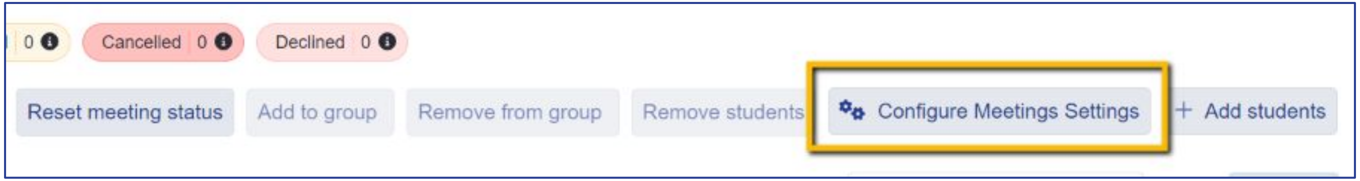
Configure the corresponding email templates: The Invitation and Confirmation Email
You can make use of the mail merge tokens



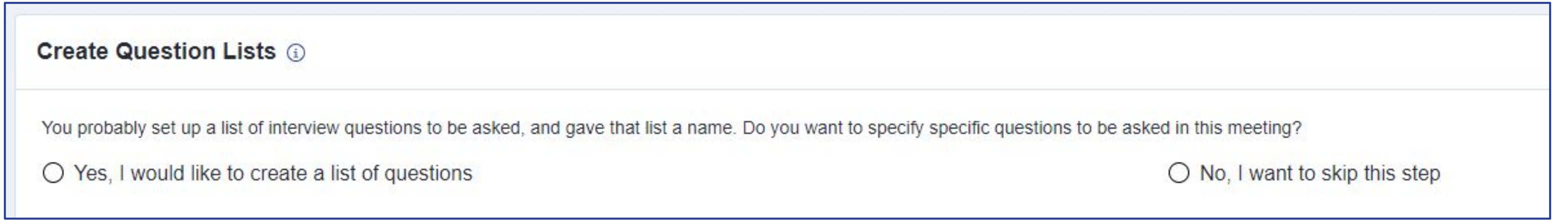
You can also set reminders to go to those who have booked, and those who have not:



Once you have created your meeting, if you need to edit the email templates you can click on ***"Configure Meetings Settings"*** to go back to the first step which is the "Setup" to edit the email templates for this meeting.



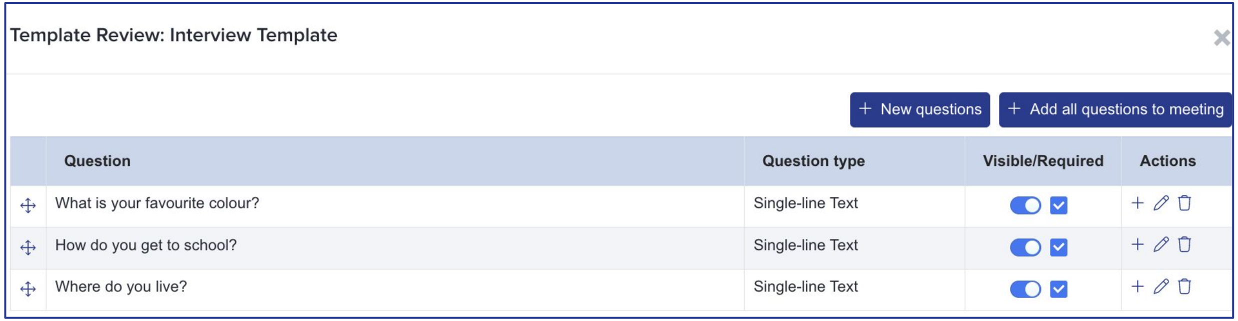
Next, Decide whether or not to include a list of preset questions for staff to ask ***during*** the meetings.



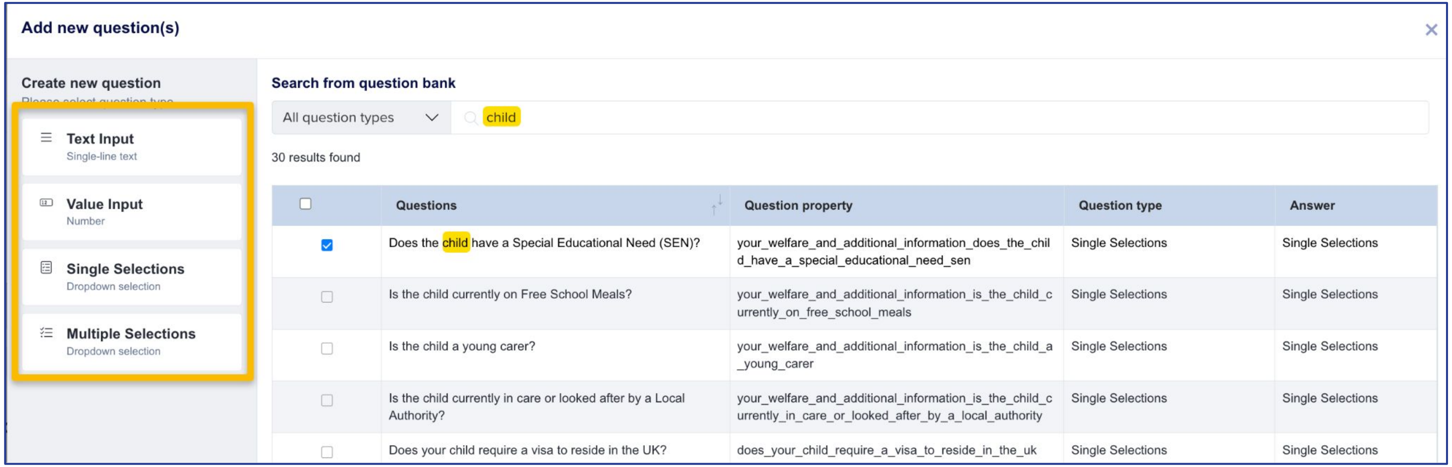
You can also view question templates you have previously made and assign those questions to any new meetings you create.

By clicking on the ***"Edit"*** button, this will let you edit the title and the description of your template.

Clicking on the ***"View"*** button will let you add questions from a template to your meeting.

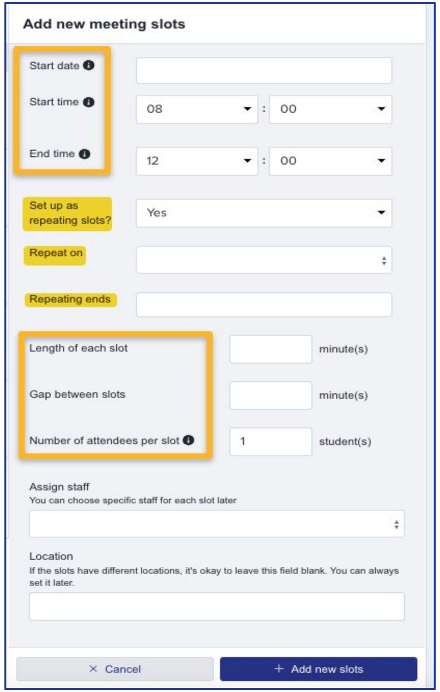


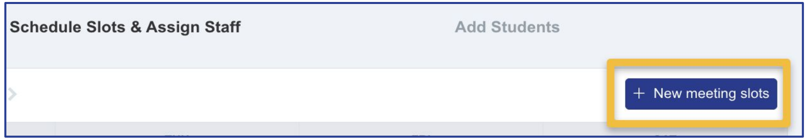
To add new questions, Click the ***+ New questions*** button at the top



You can use the question bank to search for existing questions. If you want to add an entirely new question, choose from the question types provided on the left

The questions you added or created will be displayed here. You can edit it, make it required and toggle to turn it on or off. Once done click on next to proceed with the next step



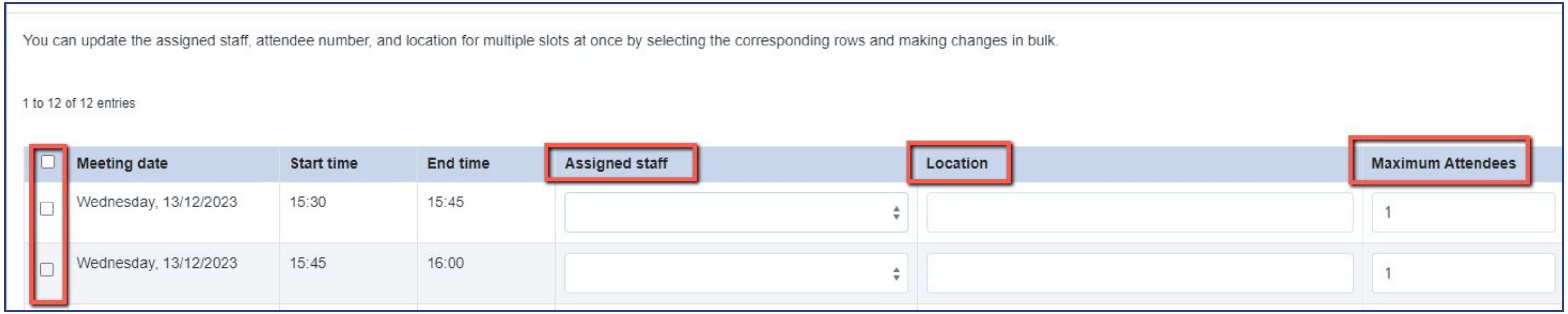


The next setting is to schedule the appointment slots and assign staff by clicking on the + New meeting slots button

Add the date of the meeting, and set the session start and end times as well as how long each appointment is, and how many students can be seen simultaneously.

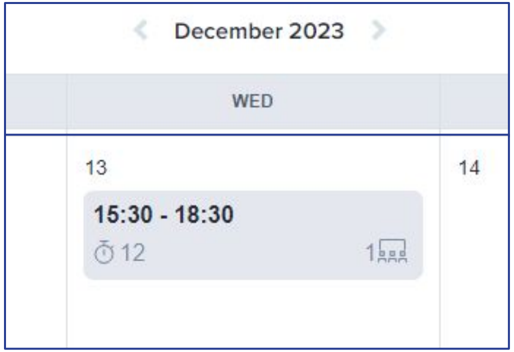
If your meetings will repeat in subsequent weeks, you can set them to repeat and set an end date. Once done, Click on the "***+ Add new slots button***"

You'll then be able to see the meeting slot details where you can assign staff to each slot, and add locations. You can update this row by row, or in bulk by selecting using the checkboxes.


You can update the assigned staff, attendee number, and location for multiple slots at once by selecting the corresponding rows and making changes in bulk.

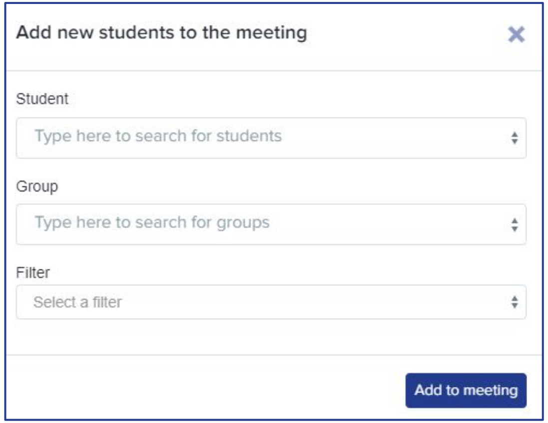
1 to 12 of 12 entries

☐	Meeting date	Start time	End time	Assigned staff	Location	Maximum Attendees
☐	Wednesday, 13/12/2023	15:30	15:45			1
☐	Wednesday, 13/12/2023	15:45	16:00			1



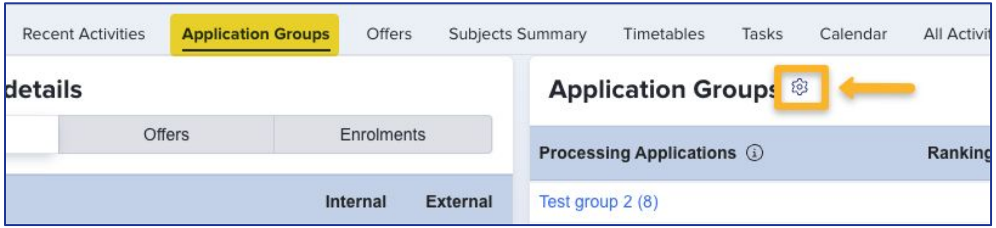
The meeting will then be displayed on the calendar, and you can repeat the process to add as many more meetings as needed.

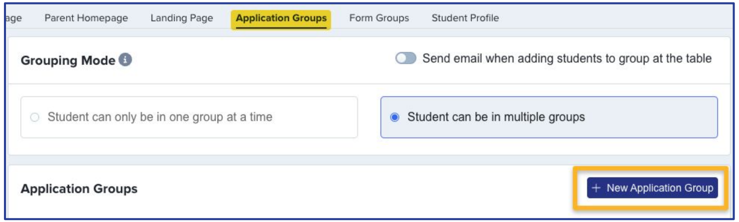
After you click ‘Next’ you’ll then be prompted to add students to the meeting - either one by one, from a group, or by using the advanced filtering option.



Adding applicants to application groups

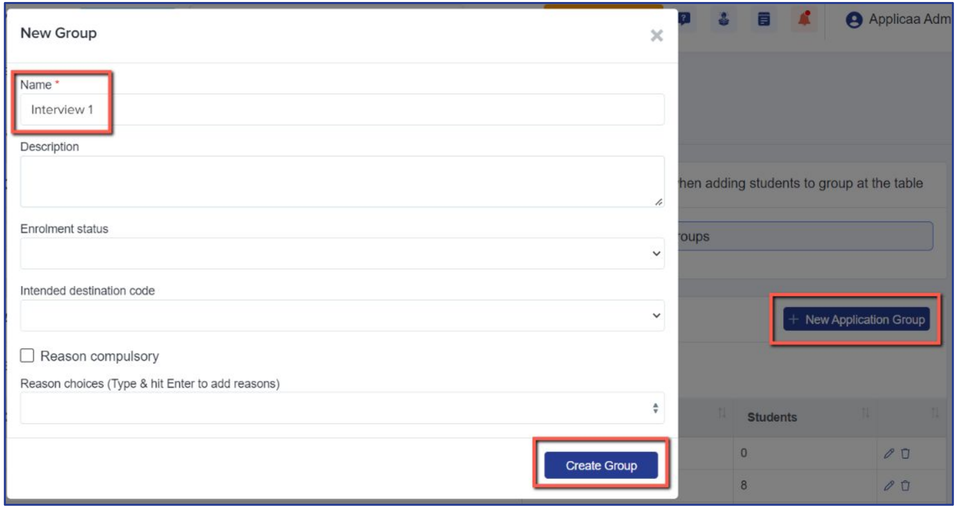
You can either add students to a meeting one by one, or in groups. To add a group, you first need to assign students to that group on your main dashboard.



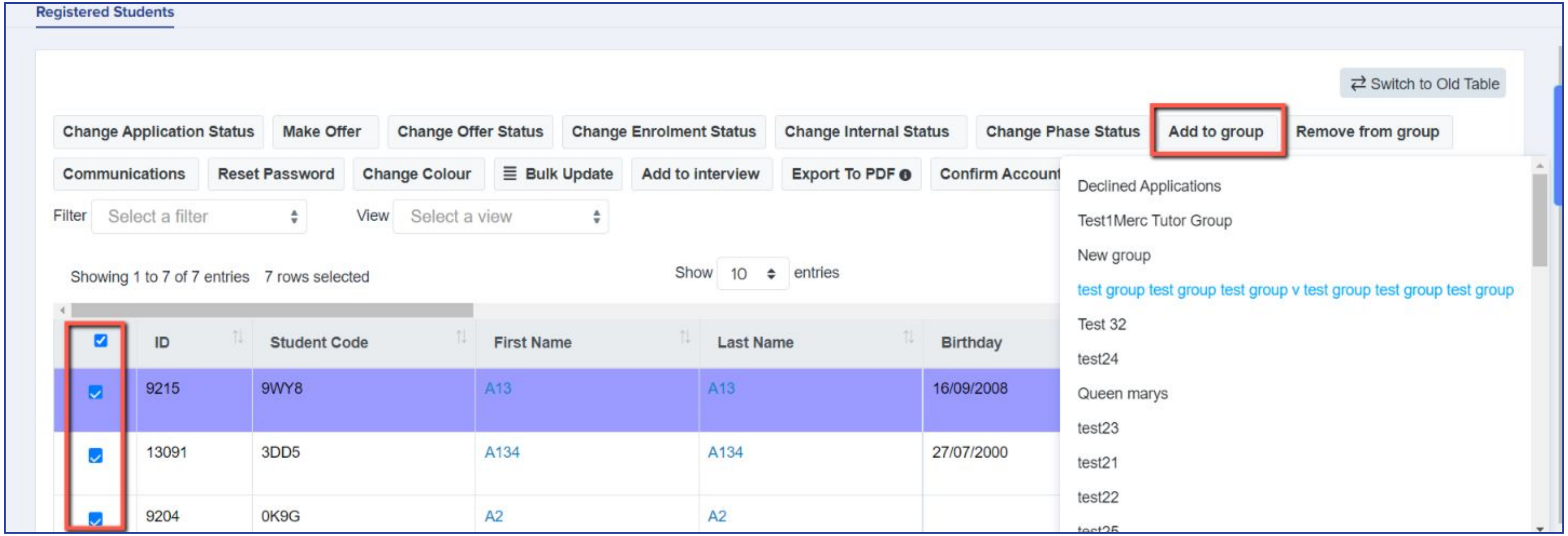


To create an application group, click the "application groups" tab from the dashboard and then click the settings cog on the top right of the table:

Then click ***"+ New Application Group"***, give it a name, set it up and press ***"create group".***



To add students to an application group, Go back to your main dashboard and click to view a list of students. Select those who you wish to add to the group using the checkboxes on the left of the table (or select them all) and then use the ***"add to group"*** button to add them to the group you created:

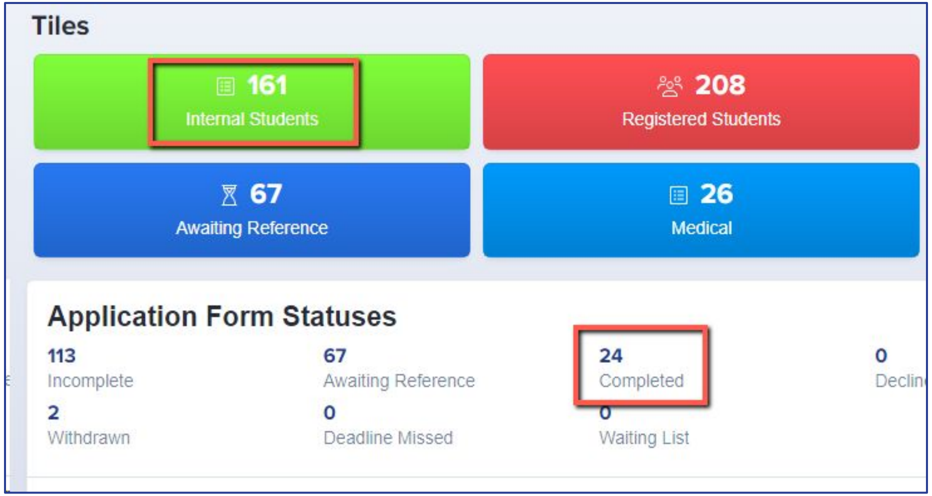


Return to the meetings area to add your group to the meeting.

Note: *this does not send an invitation to them automatically, so you can add students in prior to being ready to invite them!*

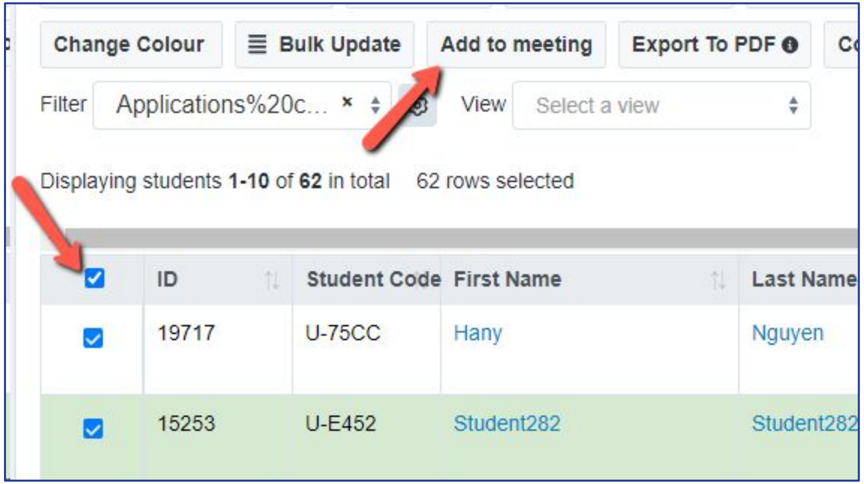
Adding applicants to a meeting from your dashboard

Select a dashboard tile or from the statuses, this will then bring you to a student table.



Select the students individually or in bulk that you want to add to a meeting by using the checkbox and click ***"add to meeting".***

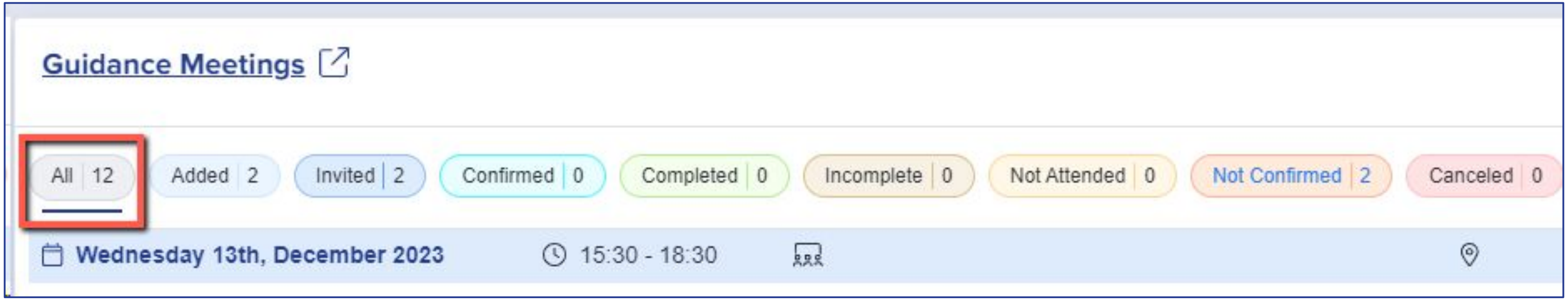
You can then return to the meetings area to invite the students.



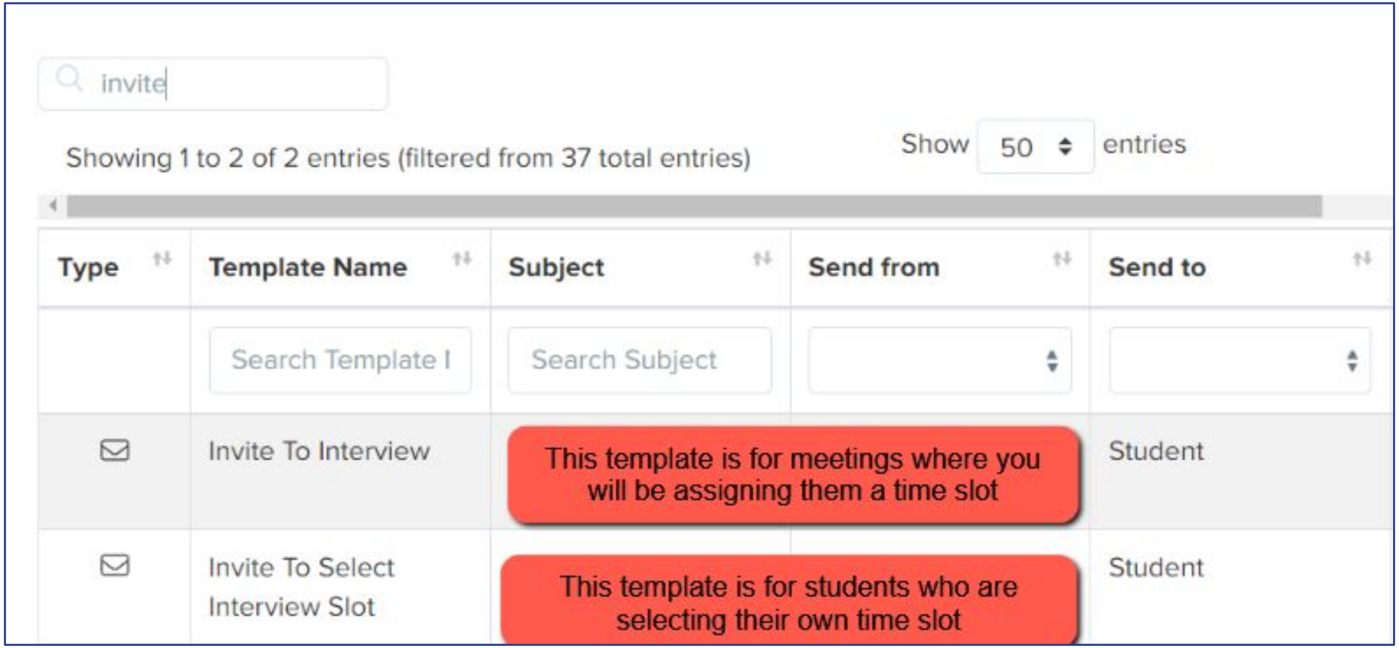
Inviting applicants to interview

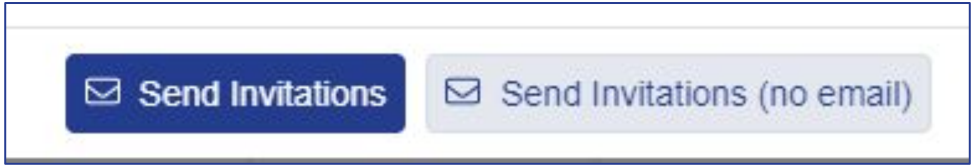
Once you have added students to a meeting, you then need to invite the parents. Visit your meetings area and click on the “all” button to see the list of meeting slots.

You will be notified if you have added any students who have not yet been allocated and/or invited.



You can check and amend the master copies of your invitation templates by navigating to **Communications and Events > Communications > Automated Messages**





When you are ready to send your invitations, you will be presented with the option to **send invitations** or **send invitations (no email).**

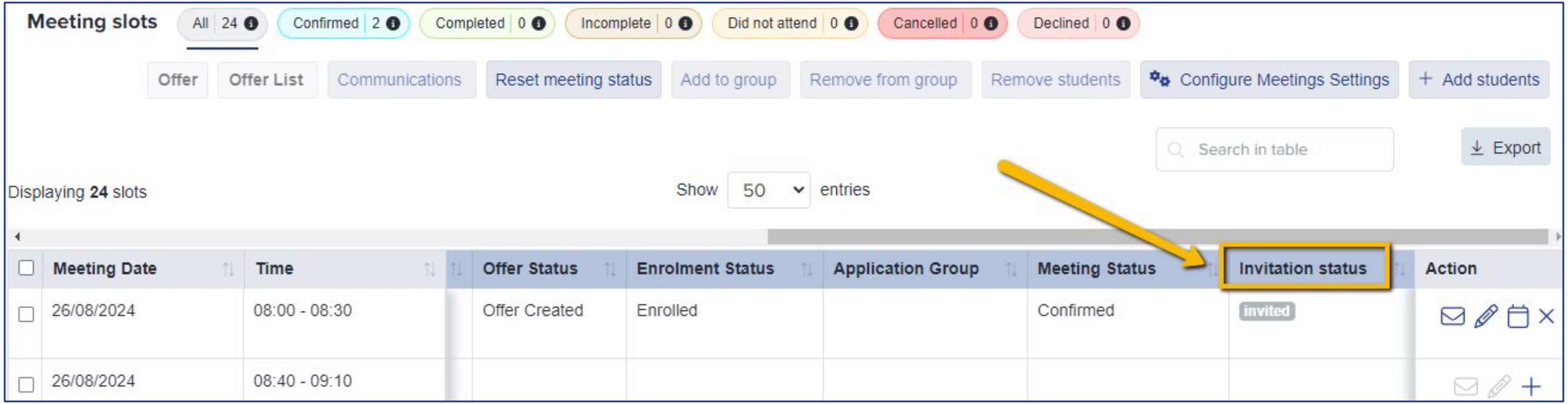
The invitations are linked to the interview templates in your automated emails area, so you can send the same invitation to all applicants if that is your process - **but what if you need to send different invitations or information to different groups or individuals?**

This is where the **“send invitations (no email)”** function comes in. It enables you to send the parents an invitation (ie put the “accept” and “decline” buttons on the parent’s homepage), without sending them the master template.

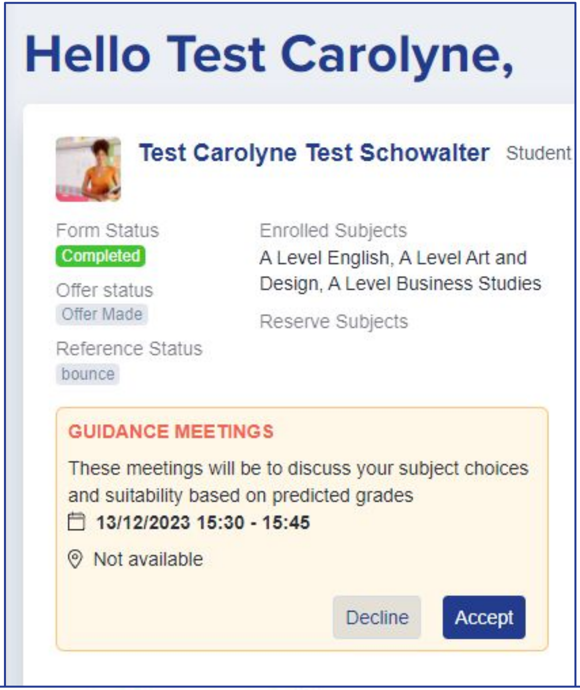
You are then free to send them a bespoke email from the manual messages area instead!

To check the status of your invitations and ensure they have been sent to the applicants, scroll right on the table to view the ***Invitation Status*** column.

Invitations have to be sent to an applicant in order for them to be able to respond (accept or decline) so you can track responses.

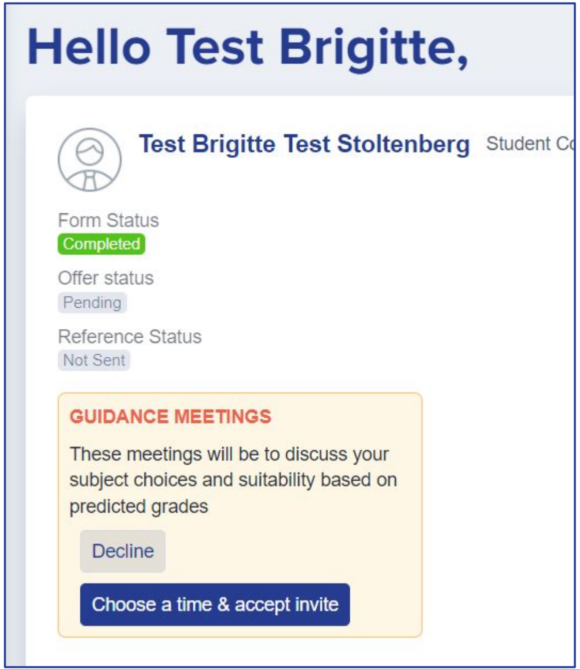


Tracking responses to invitations



Once you have sent your invitations, applicants will log into their accounts and will see something like this.

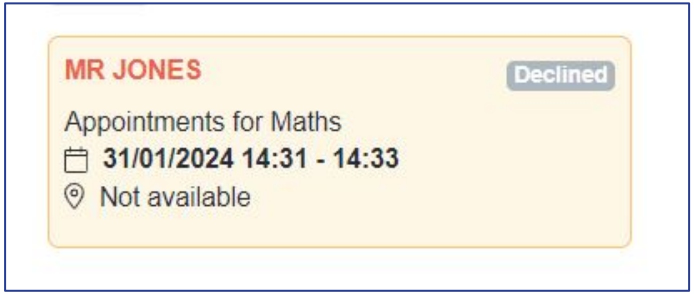
You can track their responses by clicking on the coloured boxes in your meetings area.



How to proceed if a parent declines the invitation

Did the student decline because they cannot make it on the day/time you invited them to?

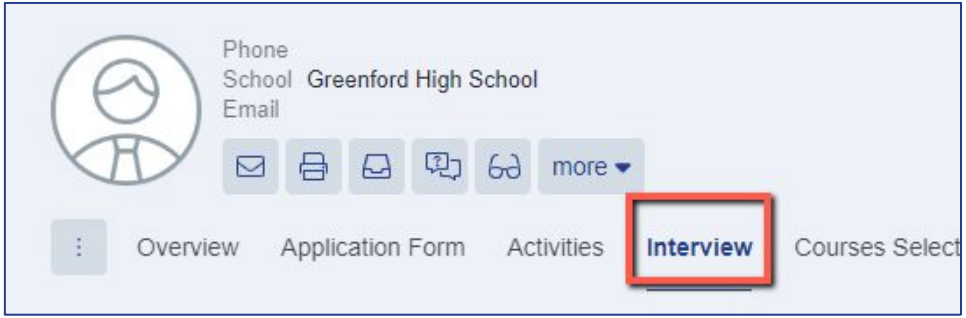
You can remove them from the original meeting and/or add them to a new one instead with a different schedule



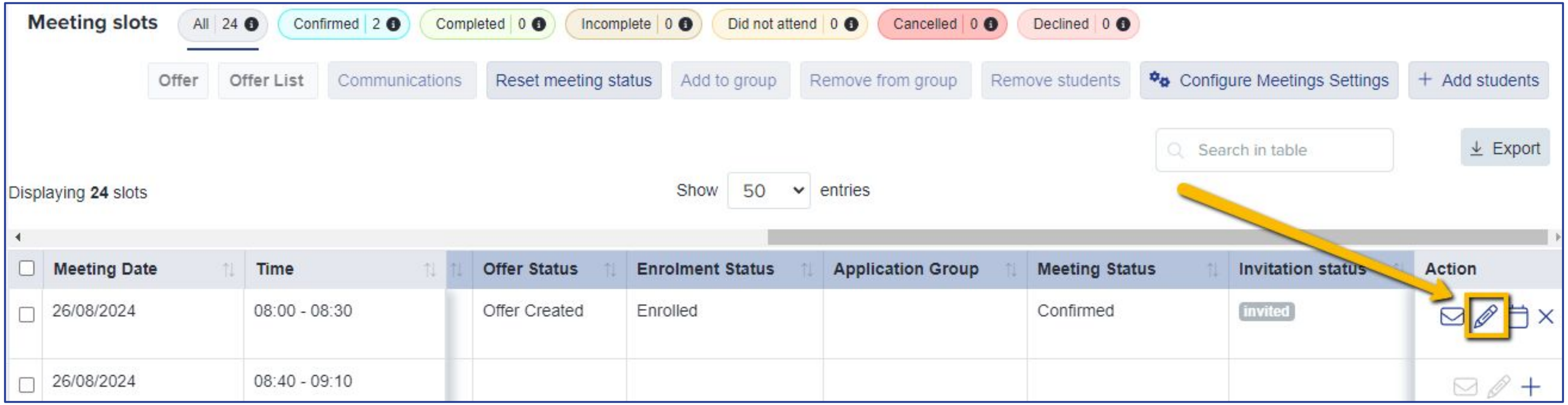
Conducting your meetings/interviews

You can search for the applicant in the search bar and go to their profile

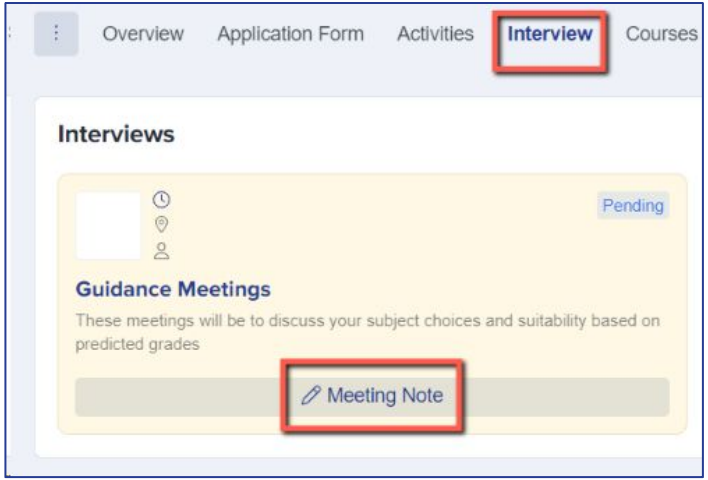
Click on their “interview” tab to access their interview notes



You can also access their appointment directly from your meetings area, by clicking the pencil icon

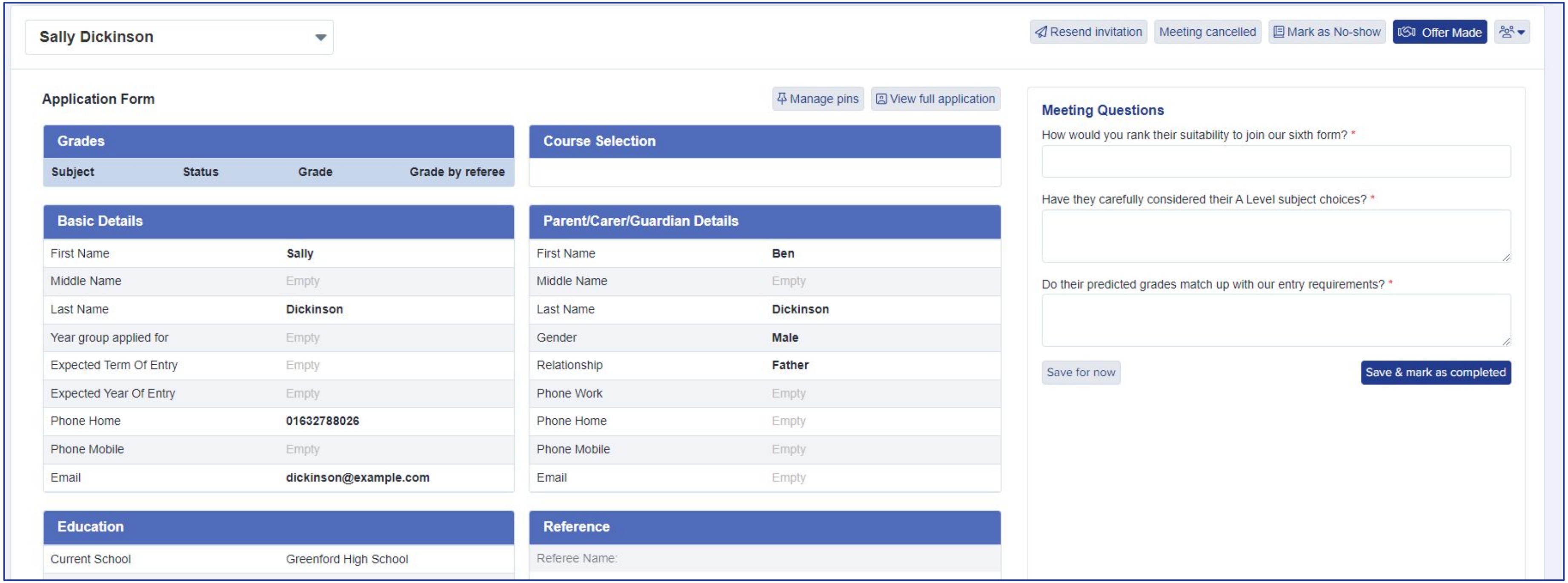


The meeting note contains the questions you added in your meeting template (if applicable).



In the meeting note, this is where you will see the questions added/created in the meeting setup.

You can also complete other actions, such as marking them as completed or incomplete, mark them as a no-show and making them an offer.



Concessions

1. Concession Types
2. Linking Concessions to Questions from Application Form
3. Review and Edit Scholarship Options in the Application Form
4. Application Form Process
5. How to review and edit concessions

Setting up “Concession Types”

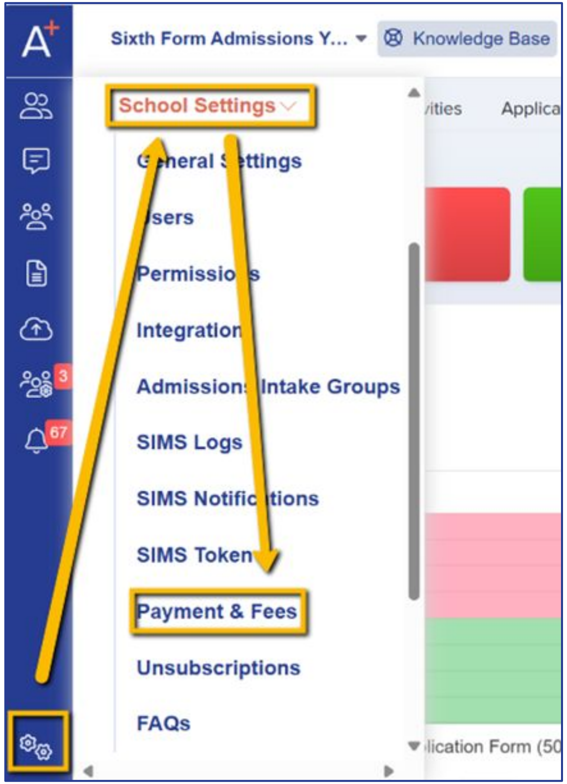
SIMS:
Make sure the concessions are active and visible in SIMS - concessions set up in SIMS will automatically appear in Admissions+.

If they aren’t, adjust the settings in SIMS; updates will reflect overnight in Admissions+.

Other MIS:
Concessions can be added in Admissions+.

To create Concession Types and include them in offer letters as email tokens:

- Go to the **"Settings"** menu.
- Select **"School Settings."**
- Go to **"Payments and Fees."**



Setting up “Concession Types”

Click on the +New Concession type” button to create a new Concession Type or to edit the concession information of an existing one, click the pencil icon.

Configuring concessions

Select a concession type from the list of options.

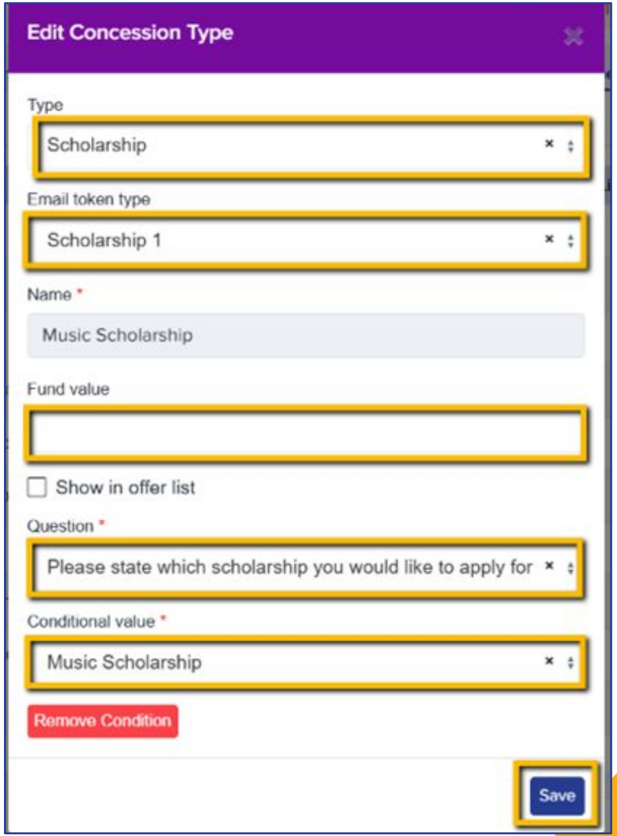
Assign an email token (e.g., "Scholarship 1").

Add the total fund value for the scholarship (this is the overall fund, not the individual amount), if known (not a mandatory requirement).

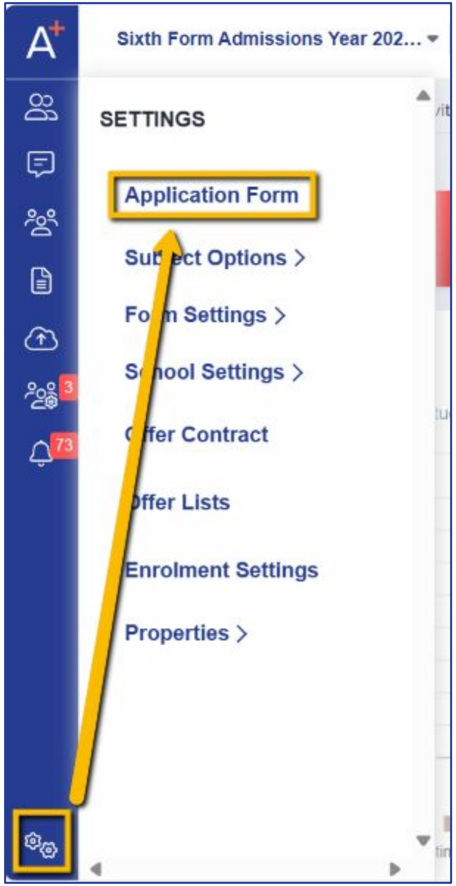
Link the scholarship to a specific question on the application form, such as: "Please state which scholarship you would like to apply for," and select the relevant scholarship.

Click **"Save"** to apply changes.

Repeat this process for each scholarship and ensure they are all set up correctly.

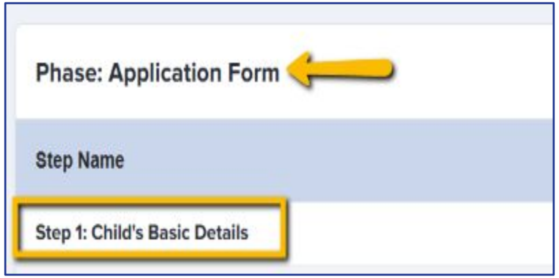


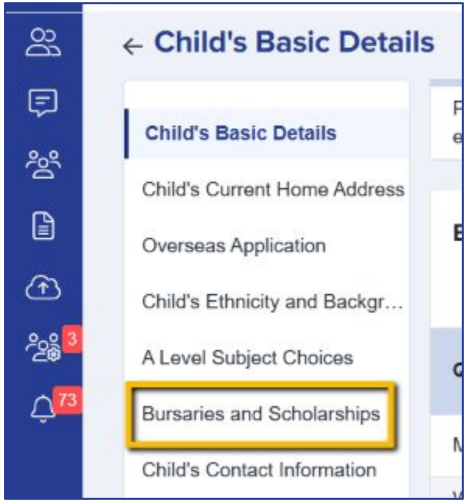
Concessions on the Application Form



Navigate to Settings > Application Form Phase > Step 1: Child’s Basic Details.

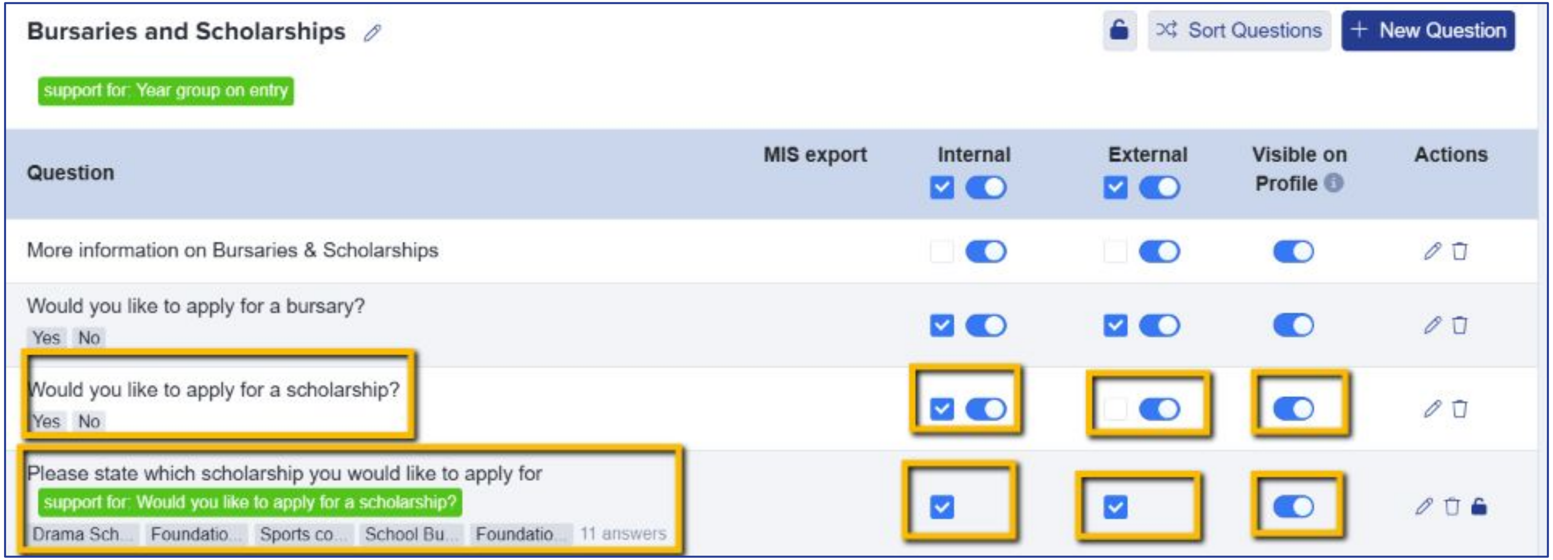
Find the **"Bursary and Scholarship"** section in the submenu.





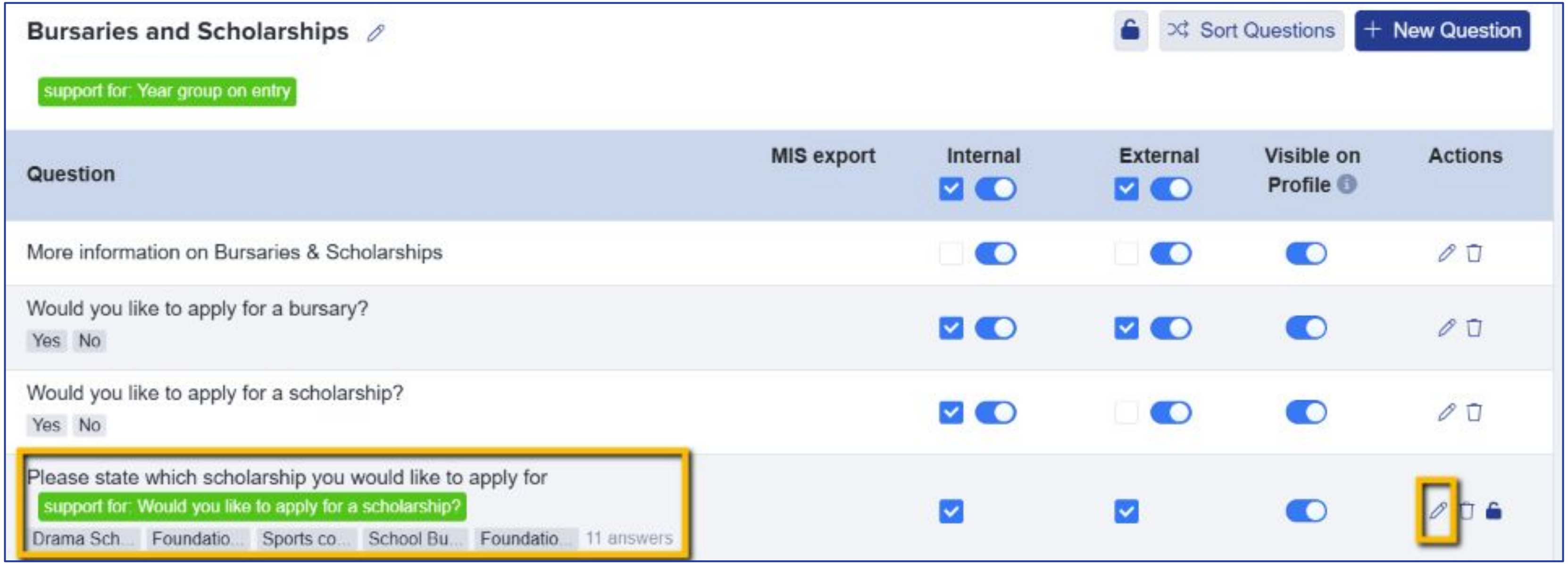
Concessions on the Application Form

Switch on questions related to scholarships ***"Would you like to apply for a scholarship?"*** and ***"Please state which scholarship you would like to apply for".***



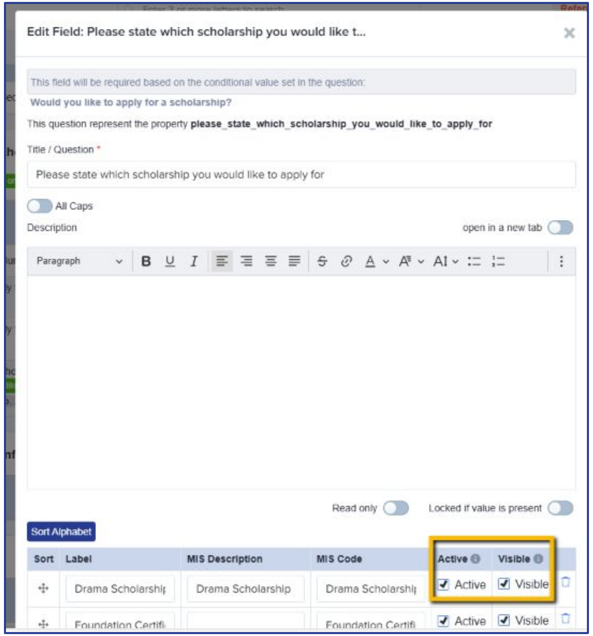
Concessions on the Application form

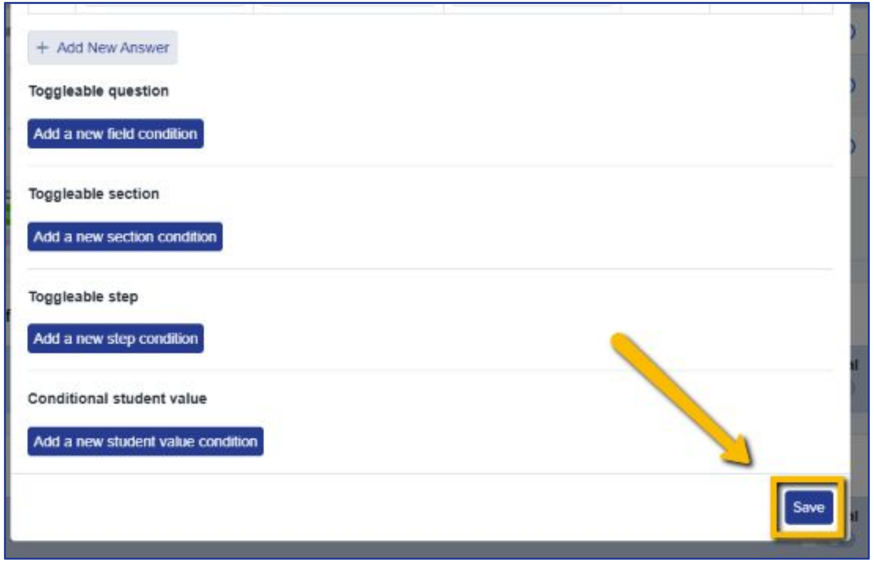
To edit options for scholarship, click the pencil icon on '***Please state which scholarship you would like to apply for'.***



Concessions in the Application Form

Edit labels, sort the order, make them active/visible on your form. You can also add conditional logic in so that when a scholarship is selected it will trigger another action in the form.





Scholarship Phase

If an applicant applies for a scholarship that requires supporting information:

Application form > Phase View

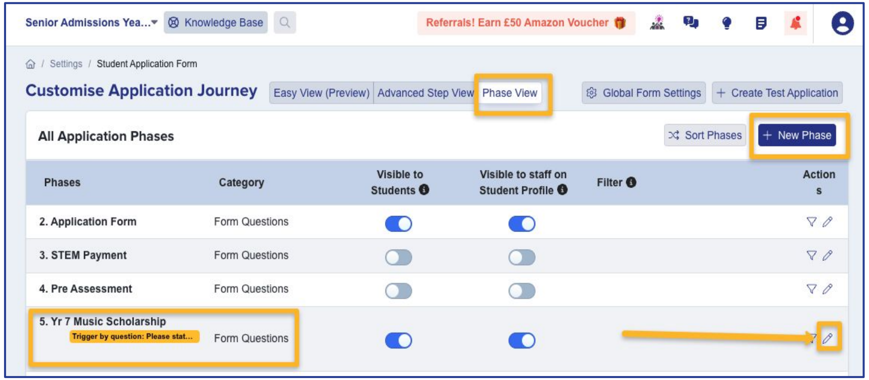
Click on "*+New phase*" to create a new phase for your scholarship or click on the pencil button to edit later

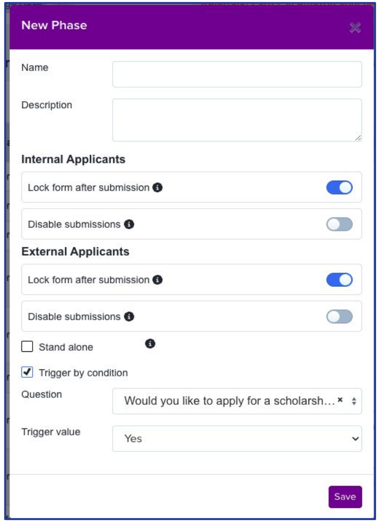
Complete the details of your new phase

Select the question it should be linked to, i.e. ***"Would you like to apply for a scholarship"*** and set the trigger value to yes.

The phase will have a yellow banner below to mark that it is linked / triggered by the question you've selected.

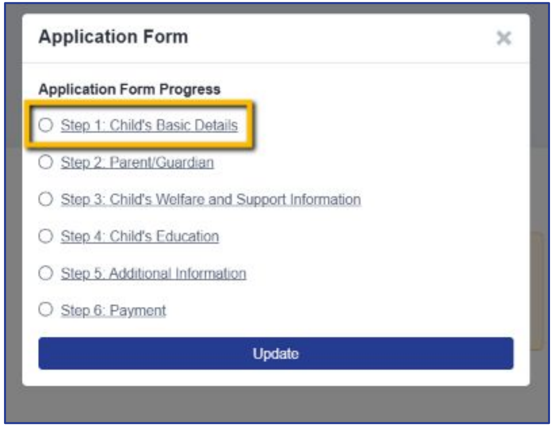
You can then set up your steps and questions for this phase.

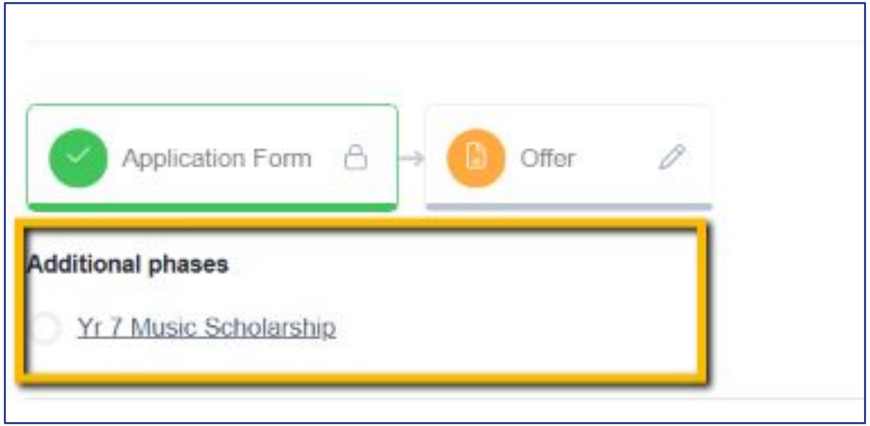




Application form process

An additional phase will look like this on the parent dashboard, allowing parents to complete applications and upload necessary information in their own time.



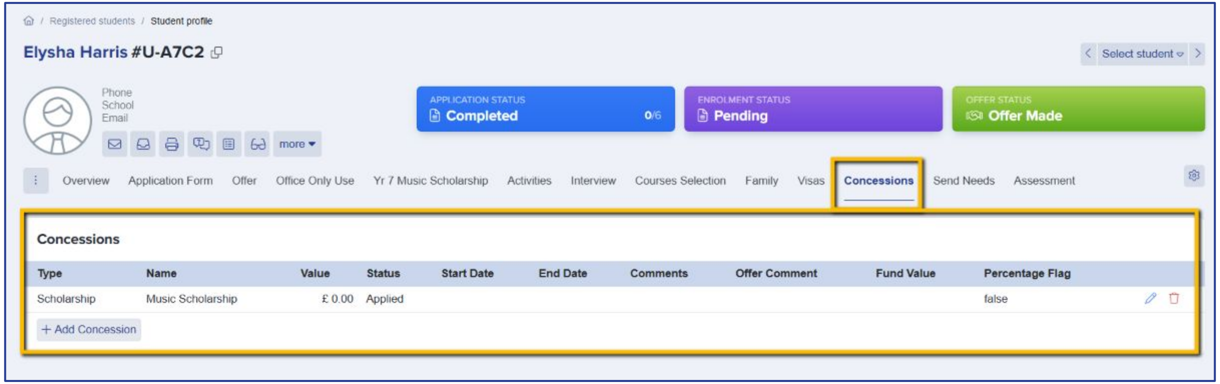


How to review and edit concessions on a student profile

If an applicant applies for a concession, an automated concession tab appears on the student record once the application is submitted.

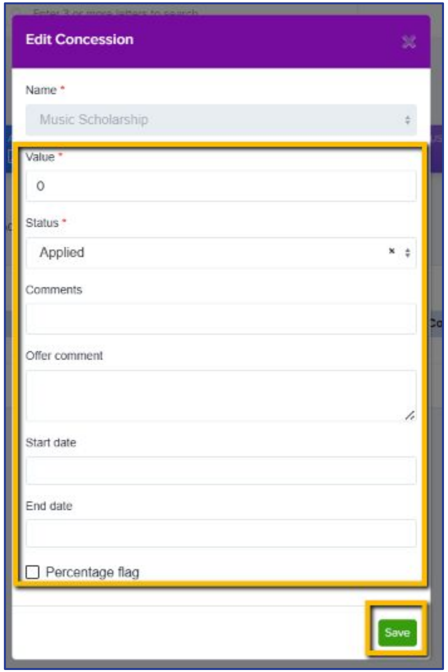
You can edit the percentage of the concession and add comments that can be pulled into the offer letters.

This concession will be reflected on the applicant record in SIMS or iSAMS.



How to review and edit concessions from a student profile

You can add a concession onto a student record manually - name it appropriately, set the value, and update the status.



Useful Information

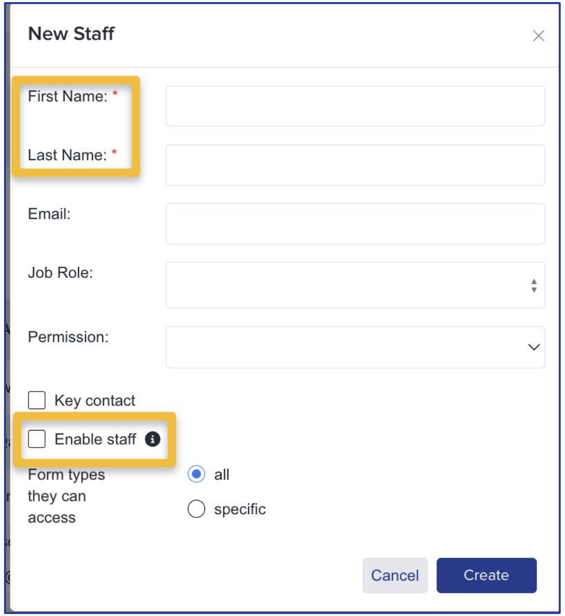
Support Telephone Number: 0208 762 0882

How to create a meeting
How to manage meetings
How to add staff
How to create an application group
Guide to concessions

Do you have any questions?

THANK YOU

To add in a staff user/teacher that you will assign on meetings, Go to settings > School settings and select users. Click on the + Add user manually. This is where you can add users and configure the settings of their access and roles on the platform.



In adding a staff, Input the first and Last name, and in this case for your meetings, make sure that the permission is set and also you can untick the checkbox for the "enable staff" setting to prevent them from logging in if they won't be needing to do it.

The purpose is to have the name of the teacher show to make parents aware who the interviewer will be in the meeting

Going back to the meeting setup, you can now assign a staff by selecting it from the dropdown button