



Admissions+

Meetings & Concessions

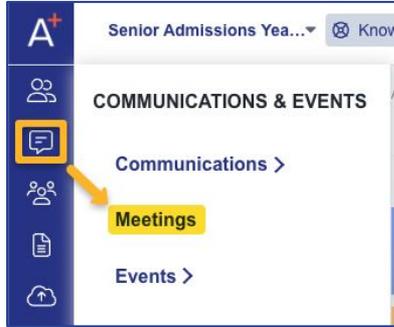




Meetings

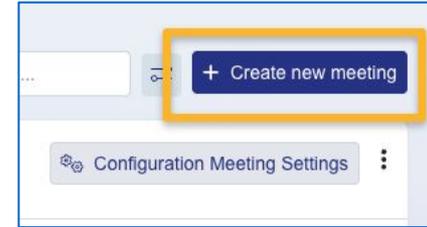
1. Setting up a meeting
2. Adding applicants to application groups
3. Inviting applicants to meetings
4. Tracking responses to invitations
5. Conducting your meetings

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

Set Up

Title (keep it user-friendly, this will appear in your email invitation)* <input type="text"/>	Category ⓘ <input type="text" value="To add a new category, start typing and hit enter"/>
Description (keep it user-friendly, this will appear in your email invitation)* <input type="text"/>	
Sender Email ⓘ <input type="text" value="admin@appliance.com"/>	Reply to email (to add a new email, start typing and hit 'Enter' to save)* <input type="text"/>
How will the meeting be scheduled?*	
<input type="radio"/> Applicants will be invited to choose their own meeting slots	<input type="radio"/> Staff will assign meeting slots before sending out invitations.
Select type(s) of emails you want to send, and customise message using personalisation tokens	

Configure the corresponding email templates: The Invitation and Confirmation Email

You can make use of the mail merge tokens

How will the meeting be scheduled?*

Applicants will be invited to choose their own meeting slots

Choose an option here, and check the configuration of the corresponding email templates underneath

Staff will assign meeting slots before sending out invitations.

Select type(s) of emails you want to send, and customise message using personalisation tokens

Invitation Email* ⓘ

Email Subject Header

Invitation to interview at Greenford High School

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Insert Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Image Icon] [Quote Icon] [More Icon]

Bulleted List

Hi **{{STUDENT_FIRST_NAME}}** **{{STUDENT_LAST_NAME}}**,

Thank you for applying to **{{SCHOOL_NAME}}**.
You are invited to attend the interview **{{INTERVIEW_TITLE}}** at **{{SCHOOL_NAME}}**

Please log on and select the date and times that suits you best.

{{DESCRIPTION}}

Please click on the link below to respond to this invitation

{{LINK}}

Best wishes,
{{SCHOOL_NAME}}

Attachments: [Click to upload](#) (this will replace all the current files)

Remove attachments?

Confirmation Email* ⓘ

Email Subject Header

[Putney High School] Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Insert Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Image Icon] [Quote Icon] [More Icon]

Dear **{{STUDENT_FIRST_NAME}}** **{{STUDENT_LAST_NAME}}**,

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Meeting: **{{INTERVIEW_TITLE}}**

Time: **{{START_TIME}}**

Date: **{{START_DATE}}**

Location: **{{LOCATION}}**

Description: **{{DESCRIPTION}}**

Kind regard,

{{TEACHER_NAME}}

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

Reminder email to confirmed students ⓘ

Email Subject Header

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Text Color Icon] [Background Color Icon] [Align Left Icon] [Align Center Icon] [Align Right Icon] [Image Icon] [More Icon]

This is a reminder of your upcoming meeting.

For your reference, please see the details below.

Meeting: {{INTERVIEW_TITLE}}

Time: {{START TIME}}

Reminder email to unconfirmed students ⓘ

Email Subject Header

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Text Color Icon] [Background Color Icon] [Align Left Icon] [Align Center Icon] [Align Right Icon] [Image Icon] [More Icon]

Dear {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}

Thank you for applying to {{SCHOOL_NAME}}.

This is a reminder email for a meeting to which you have been invited.

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.

0 ⓘ Canceled 0 ⓘ Declined 0 ⓘ

Reset meeting status Add to group Remove from group Remove students **Configure Meetings Settings** + Add students

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

Create Question Lists ?

You probably set up a list of interview questions to be asked, and gave that list a name. Do you want to specify specific questions to be asked in this meeting?

Yes, I would like to create a list of questions No, I want to skip this step

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

Question Templates					
Search in table		Show 25 per page. 1 to 3 of 3 entries		Prev 1 Next	
Title	Description	Creator	Questions	Actions	
Template copy	Copy test	Applicaa Admin	4	View	Edit
Interview Test 2	Interview Test 2		0	View	Edit
Interview Template	Interview Template		3	View	Edit

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.

Template Review: Interview Template				
		+ New questions		+ Add all questions to meeting
	Question	Question type	Visible/Required	Actions
+	What is your favourite colour?	Single-line Text	<input checked="" type="checkbox"/>	+ edit delete
+	How do you get to school?	Single-line Text	<input checked="" type="checkbox"/>	+ edit delete
+	Where do you live?	Single-line Text	<input checked="" type="checkbox"/>	+ edit delete

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

+ New questions

<input type="checkbox"/>	Questions	Question property	Question type	Answer
<input checked="" type="checkbox"/>	Does the child have a Special Educational Need (SEN)?	your_welfare_and_additional_information_does_the_child_have_a_special_educational_need_sen	Single Selections	Single Selections
<input type="checkbox"/>	Is the child currently on Free School Meals?	your_welfare_and_additional_information_is_the_child_currently_on_free_school_meals	Single Selections	Single Selections
<input type="checkbox"/>	Is the child a young carer?	your_welfare_and_additional_information_is_the_child_a_young_carer	Single Selections	Single Selections
<input type="checkbox"/>	Is the child currently in care or looked after by a Local Authority?	your_welfare_and_additional_information_is_the_child_currently_in_care_or_looked_after_by_a_local_authority	Single Selections	Single Selections
<input type="checkbox"/>	Does your child require a visa to reside in the UK?	does_your_child_require_a_visa_to_reside_in_the_uk	Single Selections	Single Selections

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

Questions	Required & Visible	Action
Does the child have a Special Educational Need (SEN)? (your_welfare_and_additional_information_does_the_child_have_a_special_educational_need_sen) No Special Educational Need Education, Health and Care Plan SEN Support Statement	<input checked="" type="checkbox"/> <input type="checkbox"/>	

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

Add new meeting slots

Start date

Start time :

End time :

Set up as repeating slots?

Repeat on

Repeating ends

Length of each slot minute(s)

Gap between slots minute(s)

Number of attendees per slot student(s)

Assign staff
You can choose specific staff for each slot later

Location
If the slots have different locations, it's okay to leave this field blank. You can always set it later.

Schedule Slots & Assign Staff

Add Students

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.

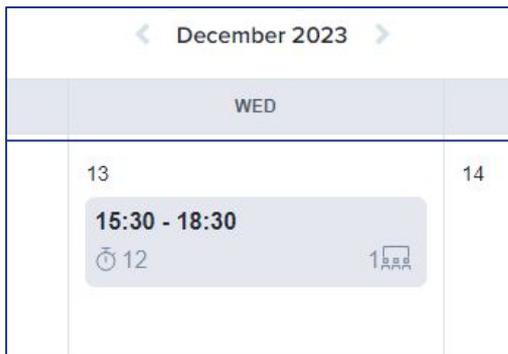
If your meetings will repeat in subsequent weeks, you can set them to repeat and set an end date. Once done, Click on the “+ Add new slots button”

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

<input type="checkbox"/>	Meeting date	Start time	End time	Assigned staff	Location	Maximum Attendees
<input type="checkbox"/>	Wednesday, 13/12/2023	15:30	15:45	<input type="text"/>	<input type="text"/>	1
<input type="checkbox"/>	Wednesday, 13/12/2023	15:45	16:00	<input type="text"/>	<input type="text"/>	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.



Add new students to the meeting ✕

Student

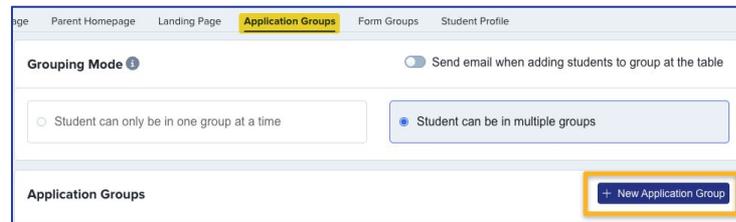
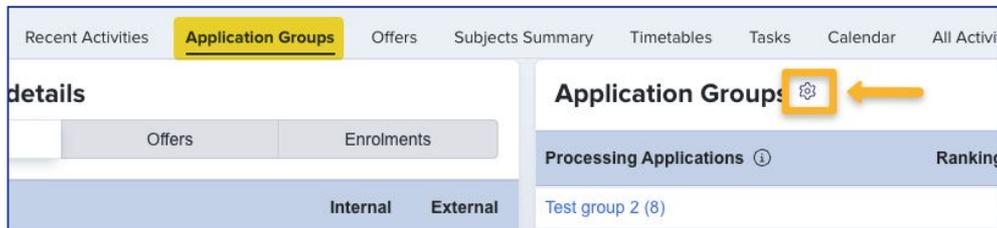
Group

Filter

[Add to meeting](#)

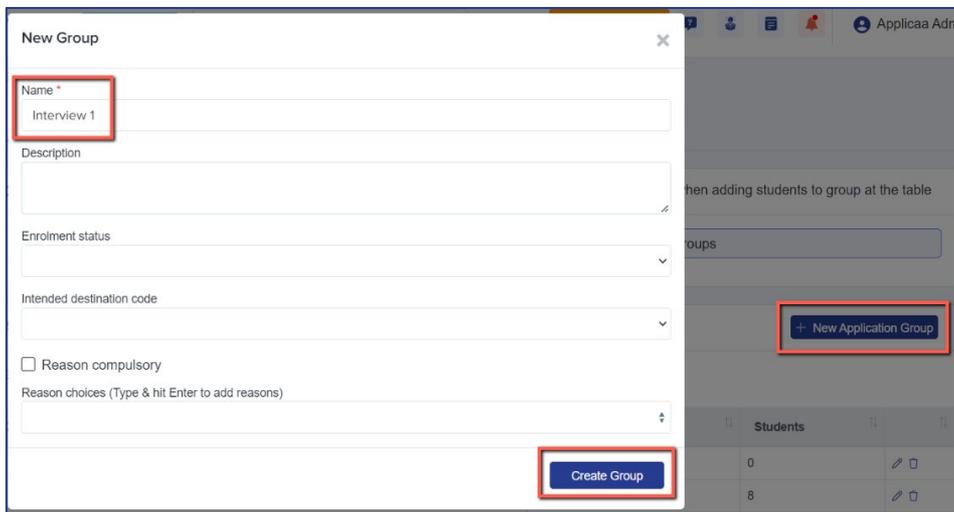
Adding applicants to application groups

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.

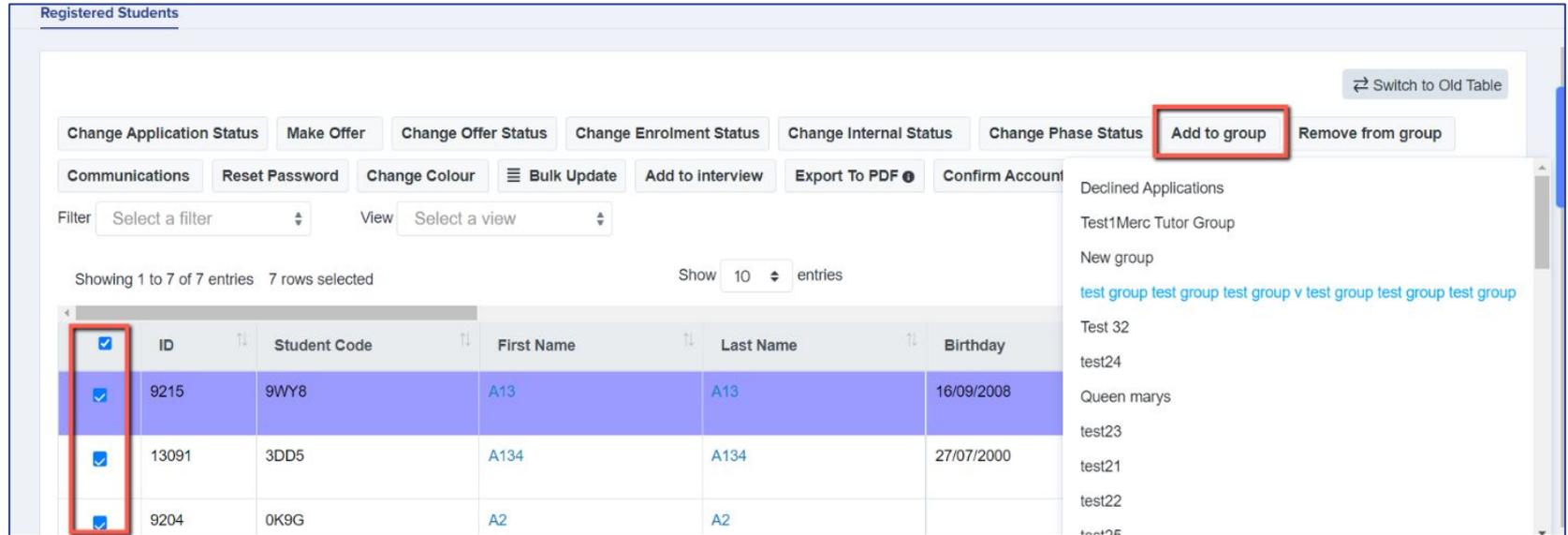


To create an application group, click the “application groups” tab from the dashboard and then click the settings cog on the top right of the table:

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:



The screenshot displays the 'Registered Students' interface. At the top, there are several action buttons: 'Change Application Status', 'Make Offer', 'Change Offer Status', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group' (highlighted with a red box), and 'Remove from group'. Below these are 'Communications', 'Reset Password', 'Change Colour', 'Bulk Update', 'Add to interview', 'Export To PDF', and 'Confirm Account'. A filter dropdown is set to 'Select a filter' and a view dropdown is set to 'Select a view'. The table shows 7 entries, with 7 rows selected. The 'Add to group' button is highlighted with a red box. The table data is as follows:

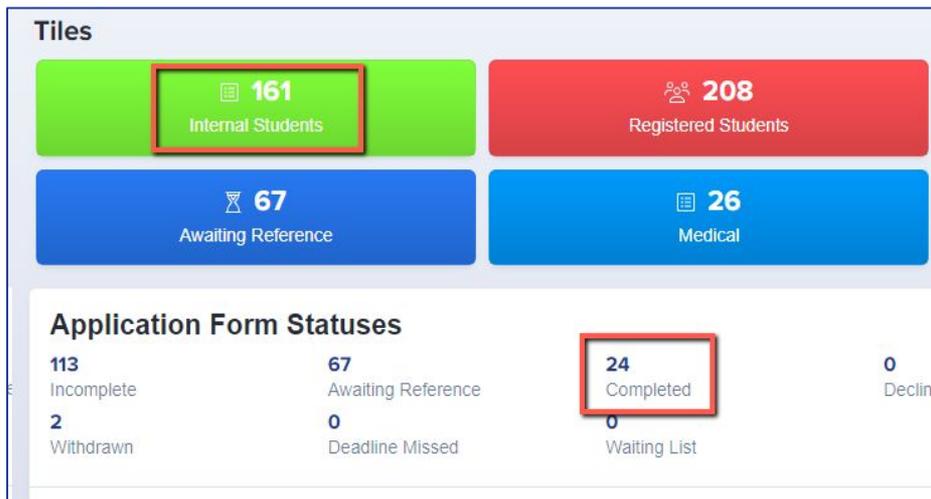
	ID	Student Code	First Name	Last Name	Birthday
<input checked="" type="checkbox"/>	9215	9WY8	A13	A13	16/09/2008
<input checked="" type="checkbox"/>	13091	3DD5	A134	A134	27/07/2000
<input checked="" type="checkbox"/>	9204	0K9G	A2	A2	

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.

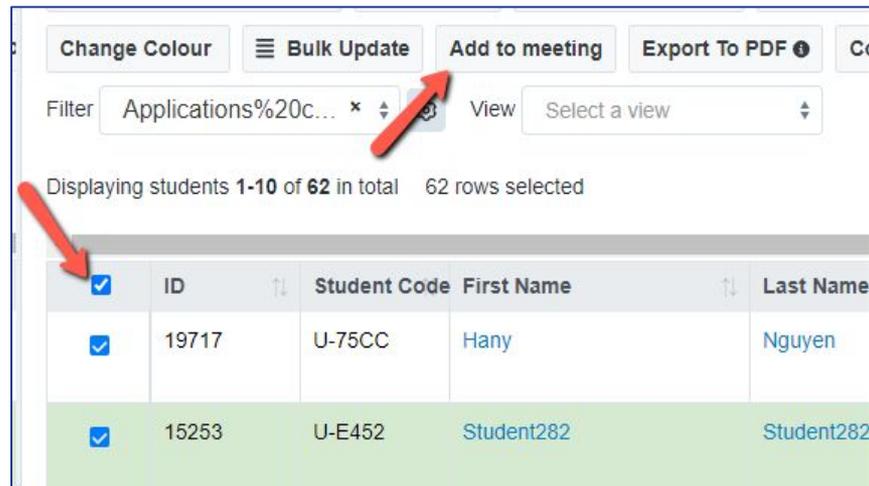


The dashboard features a 'Tiles' section with four colored boxes: a green box for 'Internal Students' (161), a red box for 'Registered Students' (208), a blue box for 'Awaiting Reference' (67), and a blue box for 'Medical' (26). Below this is the 'Application Form Statuses' section, which includes a table with the following data:

Status	Count
Incomplete	113
Awaiting Reference	67
Completed	24
Declined	0
Withdrawn	2
Deadline Missed	0
Waiting List	0

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.



The screenshot shows a table of students with columns for 'ID', 'Student Code', 'First Name', and 'Last Name'. The first three rows are highlighted in green, and each has a checked checkbox in the first column. Above the table, there are buttons for 'Change Colour', 'Bulk Update', 'Add to meeting', and 'Export To PDF'. A red arrow points to the 'Add to meeting' button. Below the table, it says 'Displaying students 1-10 of 62 in total 62 rows selected'.

	ID	Student Code	First Name	Last Name
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	19717	U-75CC	Hany	Nguyen
<input checked="" type="checkbox"/>	15253	U-E452	Student282	Student282

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.

Guidance Meetings

All | 12 Added | 2 Invited | 2 Confirmed | 0 Completed | 0 Incomplete | 0 Not Attended | 0 Not Confirmed | 2 Canceled | 0

 Wednesday 13th, December 2023  15:30 - 18:30  

 You have 4 unallocated student(s)

[View details](#) [Allocate students](#)

 You have 4 applicant(s) that have been allocated but have not been invited

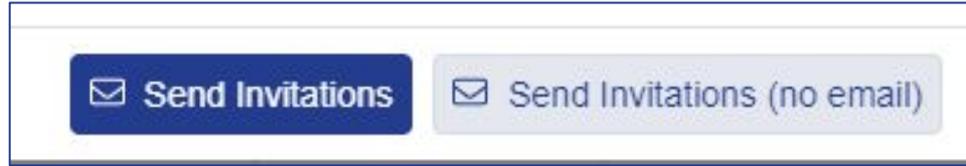
[View details](#) [Invite students](#)

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

invite

Showing 1 to 2 of 2 entries (filtered from 37 total entries) Show 50 entries

Type	Template Name	Subject	Send from	Send to
	<input type="text" value="Search Template I"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>
	Invite To Interview	<div style="background-color: red; color: white; padding: 5px; border-radius: 10px;">This template is for meetings where you will be assigning them a time slot</div>		Student
	Invite To Select Interview Slot	<div style="background-color: red; color: white; padding: 5px; border-radius: 10px;">This template is for students who are selecting their own time slot</div>		Student



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

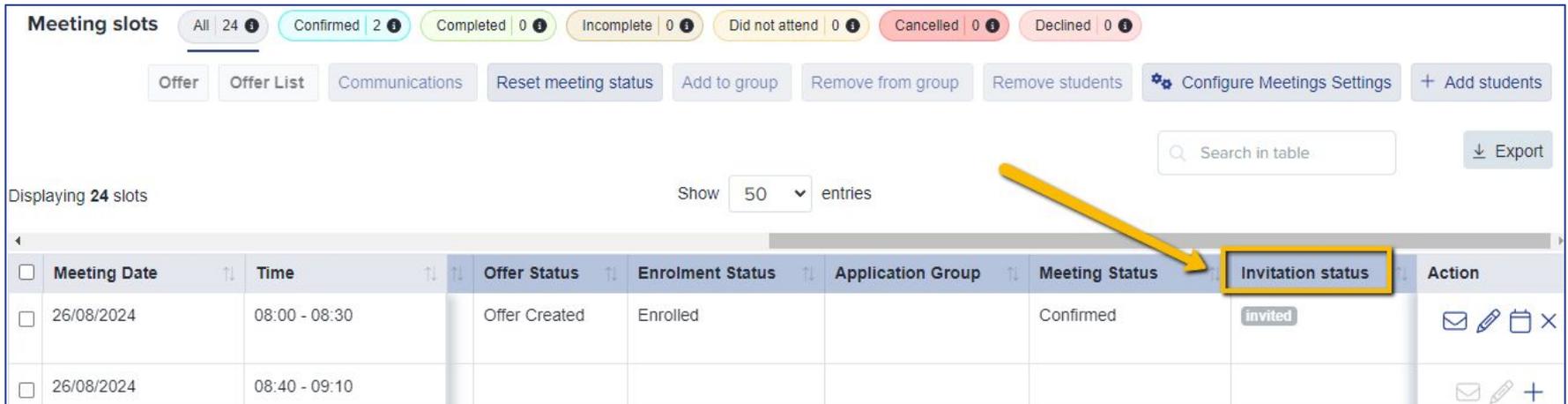
The invitations are linked to the interview templates in your automated emails area, so you can send the same invitation to all applicants if that is your process - **but what if you need to send different invitations or information to different groups or individuals?**

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.



Meeting slots All 24 **Confirmed** 2 **Completed** 0 **Incomplete** 0 **Did not attend** 0 **Cancelled** 0 **Declined** 0

Offer Offer List Communications Reset meeting status Add to group Remove from group Remove students Configure Meetings Settings Add students

Search in table Export

Displaying 24 slots Show 50 entries

<input type="checkbox"/>	Meeting Date	Time	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status	Action
<input type="checkbox"/>	26/08/2024	08:00 - 08:30	Offer Created	Enrolled		Confirmed	invited	
<input type="checkbox"/>	26/08/2024	08:40 - 09:10						

Tracking responses to invitations

Hello Test Carolyne,



Test Carolyne Test Schowalter Student

Form Status

Completed

Offer status

Offer Made

Reference Status

bounce

Enrolled Subjects

A Level English, A Level Art and Design, A Level Business Studies

Reserve Subjects

GUIDANCE MEETINGS

These meetings will be to discuss your subject choices and suitability based on predicted grades

📅 13/12/2023 15:30 - 15:45

📍 Not available

Decline

Accept

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.

Hello Test Brigitte,



Test Brigitte Test Stoltenberg Student Co

Form Status

Completed

Offer status

Pending

Reference Status

Not Sent

GUIDANCE MEETINGS

These meetings will be to discuss your subject choices and suitability based on predicted grades

Decline

Choose a time & accept invite

Guidance Meetings

All 12

Added 6

Invited 6

Confirmed 0

Completed 0

Incomplete 0

Not Attended 0

Not Confirmed 6

Canceled 0

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

MR JONES Declined

Appointments for Maths

📅 31/01/2024 14:31 - 14:33

📍 Not available

[Mr Jones](#) 

All 19  Allocated 5  Invited 4  Not Confirmed 4  Confirmed 0  Completed 0  Incomplete 0  Did not attend 0  Cancelled 0  Declined 1 

📅 Friday 24th, November 2023 ⌚ 13:00 - 15:00 🗿 Maru Alliroz 👤 4 / 6

📅 Wednesday 31st, January 2024 ⌚ 14:31 - 14:56 🗿 👤 1 / 13



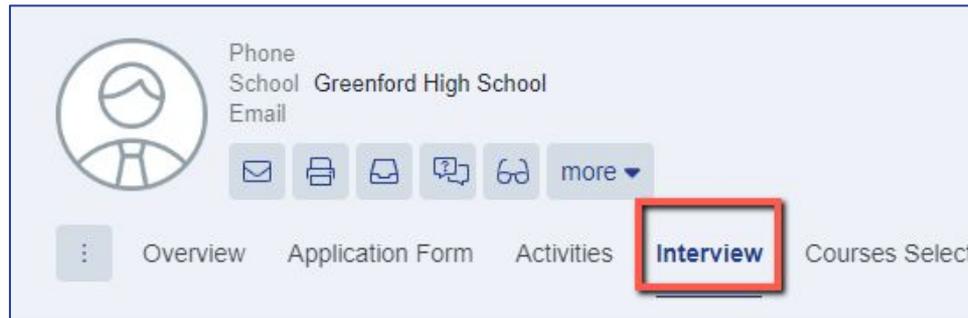
Conducting your meetings/interviews

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



The screenshot shows a search interface. At the top left, there are dropdown menus for "Year 12 Admissions Admissions Y..." and "Knowledge Base". A search bar on the right contains the text "ariel". Below the search bar, a list of applicants is shown under the heading "Applicants in this form:". The first applicant, "Ariel Bhosale" with email "ha+test220703@applicaa.com", is highlighted with a red box. A red callout box with an arrow points to this entry, containing the text "Click to load their profile". Another red callout box with an arrow points to the search bar, containing the text "Find them in the search bar".

Click on their "interview" tab to access their interview notes



The screenshot shows an applicant profile page. On the left is a circular profile icon. To its right, the text "Phone", "School Greenford High School", and "Email" is displayed. Below this text are several icons: an envelope, a printer, a folder, a speech bubble, a magnifying glass, and a "more" dropdown menu. At the bottom of the page, there is a navigation bar with tabs: "Overview", "Application Form", "Activities", "Interview", and "Courses Select". The "Interview" tab is highlighted with a red box.

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

Meeting slots

All 24 2 Confirmed 0 Completed 0 Incomplete 0 Did not attend 0 Cancelled 0 Declined 0

Offer Offer List Communications Reset meeting status Add to group Remove from group Remove students Configure Meetings Settings Add students

Search in table Export

Displaying 24 slots Show 50 entries

Meeting Date	Time	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status	Action
26/08/2024	08:00 - 08:30	Offer Created	Enrolled		Confirmed	invited	
26/08/2024	08:40 - 09:10						

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

Overview Application Form Activities **Interview** Courses

Interviews

Pending

Guidance Meetings

These meetings will be to discuss your subject choices and suitability based on predicted grades

 Meeting Note

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.

Sally Dickinson

Resend invitation Meeting cancelled Mark as No-show Offer Made

Application Form

Manage pins View full application

Grades			
Subject	Status	Grade	Grade by referee

Course Selection	

Basic Details	
First Name	Sally
Middle Name	Empty
Last Name	Dickinson
Year group applied for	Empty
Expected Term Of Entry	Empty
Expected Year Of Entry	Empty
Phone Home	01632788026
Phone Mobile	Empty
Email	dickinson@example.com

Parent/Carer/Guardian Details	
First Name	Ben
Middle Name	Empty
Last Name	Dickinson
Gender	Male
Relationship	Father
Phone Work	Empty
Phone Home	Empty
Phone Mobile	Empty
Email	Empty

Education	
Current School	Greenford High School

Reference	
Referee Name:	

Meeting Questions

How would you rank their suitability to join our sixth form? *

Have they carefully considered their A Level subject choices? *

Do their predicted grades match up with our entry requirements? *

Save for now Save & mark as completed



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+.

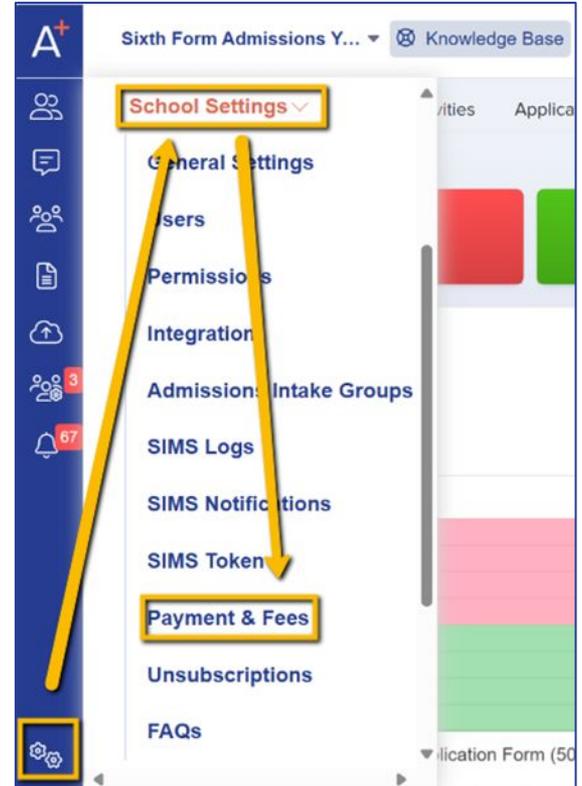
If they aren't, adjust the settings in SIMS; updates will reflect overnight in Admissions+.

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.

Home / Settings / School Settings / Payment & Fees

School Settings

General Settings Users Permissions Integration Admissions Intake Groups SIMS Logs SIMS Token SIMS Notifications **Payment & Fees**

Payments

All Payment Types

Concession Types

Type	Name	Admissions Year	Year Groups
International	International	2024/2025	Year 13, Year 12, Year 11, Year 10, Year 9, Year 8, Year 7

Concession Types

[+ New Concession Type](#)

#	Name	MIS Type	Fund Value	Show In Offer List	Email Token Type	Link to question
---	------	----------	------------	--------------------	------------------	------------------

Concession Types

#	Name	MIS Type	Fund Value	Show In Offer List	Email Token Type	Link to question
1	Music Scholarship	Scholarship		No	Scholarship 1	

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.

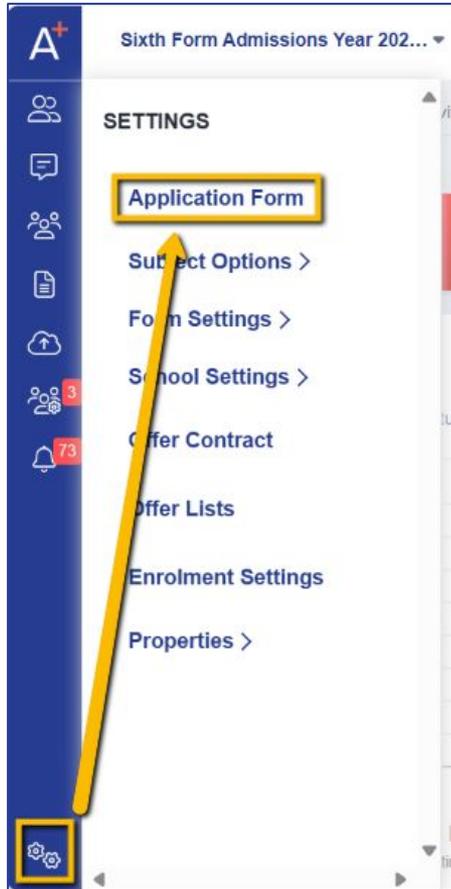
Repeat this process for each scholarship and ensure they are all set up correctly.

The screenshot shows a web form titled "Edit Concession Type" with a purple header. The form contains several fields, each highlighted with a yellow border:

- Type:** A dropdown menu with "Scholarship" selected.
- Email token type:** A dropdown menu with "Scholarship 1" selected.
- Name:** A text input field containing "Music Scholarship".
- Fund value:** An empty text input field.
- Show in offer list:** An unchecked checkbox.
- Question:** A dropdown menu with "Please state which scholarship you would like to apply for" selected.
- Conditional value:** A dropdown menu with "Music Scholarship" selected.

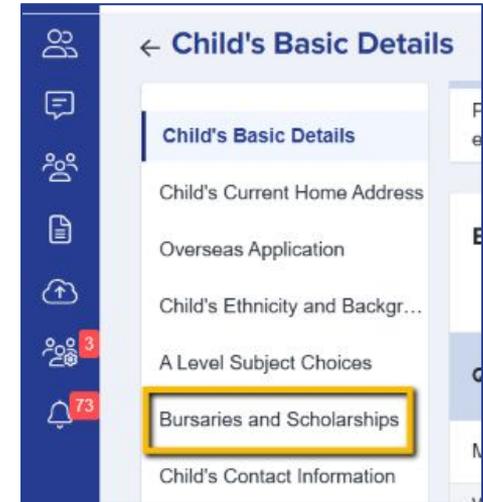
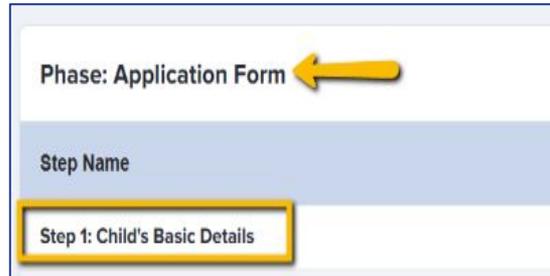
At the bottom of the form, there is a red button labeled "Remove Condition" and a blue button labeled "Save".

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”*.

Bursaries and Scholarships    Sort Questions 

support for: Year group on entry

Question	MIS export	Internal	External	Visible on Profile 	Actions
More information on Bursaries & Scholarships		<input type="checkbox"/> 	<input type="checkbox"/> 		 
Would you like to apply for a bursary? Yes No		<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 		 
Would you like to apply for a scholarship? Yes No		<input checked="" type="checkbox"/> 	<input type="checkbox"/> 		 
Please state which scholarship you would like to apply for support for: Would you like to apply for a scholarship?		<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 		  

Drama Sch Foundatio Sports co School Bu Foundatio 11 answers

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'*.

Bursaries and Scholarships   [Sort Questions](#) [+ New Question](#)

support for: Year group on entry

Question	MIS export	Internal	External	Visible on Profile 	Actions
More information on Bursaries & Scholarships		<input type="checkbox"/> 	<input type="checkbox"/> 		 
Would you like to apply for a bursary? Yes No		<input checked="" type="checkbox"/> 	<input checked="" type="checkbox"/> 		 
Would you like to apply for a scholarship? Yes No		<input checked="" type="checkbox"/> 	<input type="checkbox"/> 		 
Please state which scholarship you would like to apply for support for: Would you like to apply for a scholarship? Drama Sch... Foundatio... Sports co... School Bu... Foundatio... 11 answers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		  

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.

The screenshot shows the 'Edit Field' configuration interface for a question titled 'Please state which scholarship you would like to...'. The interface includes a text area for the question description, a rich text editor for the field description, and a table of scholarship options. The table has columns for 'Sort', 'Label', 'MIS Description', 'MIS Code', 'Active', and 'Visible'. The 'Active' and 'Visible' columns for the first two rows are highlighted with a yellow box.

Sort	Label	MIS Description	MIS Code	Active	Visible
+	Drama Scholarship	Drama Scholarship	Drama Scholarship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
-	Foundation Certifi.		Foundation Certifi.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

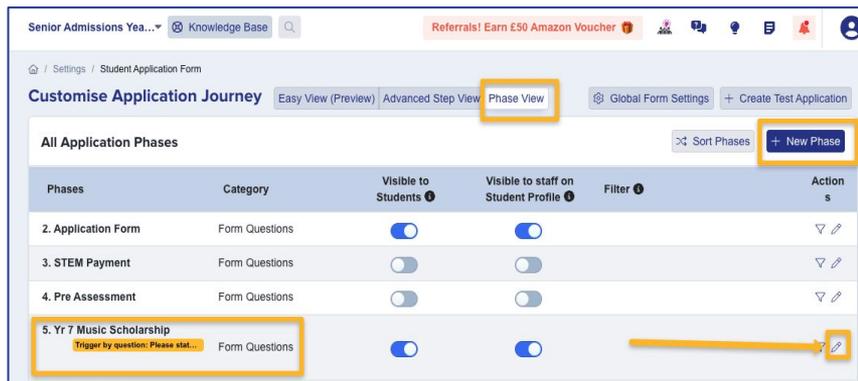
The screenshot shows the conditional logic configuration interface. It features several sections with buttons to add conditions: 'Add a new field condition', 'Add a new section condition', 'Add a new step condition', and 'Add a new student value condition'. A yellow arrow points to a 'Save' button in the bottom right corner.

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.

New Phase

Name:

Description:

Internal Applicants

Lock form after submission

Disable submissions

External Applicants

Lock form after submission

Disable submissions

Stand alone

Trigger by condition

Question: Would you like to apply for a scholarsh... * ↓

Trigger value: Yes ↓

Save

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.

Application Form

Application Form Progress

- Step 1: Child's Basic Details
- Step 2: Parent/Guardian
- Step 3: Child's Welfare and Support Information
- Step 4: Child's Education
- Step 5: Additional Information
- Step 6: Payment

Update

Application Form → Offer

Additional phases

- Yr 7 Music Scholarship

Please state which scholarship(s) you would like to apply for?*

You may apply for more than one.

Music Scholarship ✕

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.

Registered students / Student profile

Elysha Harris #U-A7C2

Phone
School
Email

APPLICATION STATUS
Completed 0/6

ENROLMENT STATUS
Pending

OFFER STATUS
Offer Made

Overview Application Form Offer Office Only Use Yr 7 Music Scholarship Activities Interview Courses Selection Family Visas **Concessions** Send Needs Assessment

Type	Name	Value	Status	Start Date	End Date	Comments	Offer Comment	Fund Value	Percentage Flag
Scholarship	Music Scholarship	£ 0.00	Applied						false

+ Add Concession

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.

Concessions			
Type	Name	Value	Status
Scholarship	Music Scholarship	£ 0.00	Applied
+ Add Concession			

Edit Concession

Name *
Music Scholarship

Value *
0

Status *
Applied

Comments

Offer comment

Start date

End date

Percentage flag

Save

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](#)

The background features a central light blue hexagon. To its top-left is a grey hexagon, and to its top-right is an orange parallelogram. Below the central hexagon are three smaller hexagons: a dark blue one on the left, a light blue one on the right, and a very small light blue one at the bottom center.

Do you have any questions?



THANK YOU

School Settings ▾

- General Settings
- Users**
- Permissions
- Integration
- Admissions Intake Groups
- SIMS Logs
- SIMS Notifications
- SIMS Token
- Payment & Fees
- Unsubscriptions
- FAQs
- Offer Contract
- Offer Lists

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.

Import users + Add User Manually

New Staff

First Name: *

Last Name: *

Email:

Job Role:

Permission:

Key contact

Enable staff ⓘ

Form types they can access

all specific

Cancel Create

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

Meeting slot details

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 8 of 8 entries

Meeting date	Start time	End time	Assigned staff	Location
<input type="checkbox"/> Friday, 20/12/2024	08:00	08:30	Pretend Customer ✕	
<input type="checkbox"/> Friday, 20/12/2024	08:30	09:00	Pretend Customer ✕	