Data+ Guide

OVERVIEW

If you have subscribed to our Data+ feature, you may use your system to complete data collection/checking exercises with with the parents of existing students at your school.

This feature is available to schools which use SIMS or Arbor as their MIS.

How to see your new form

Click on the blue wording in the upper left of your dashboard and then click "forms area/multiple forms".

Your tiles area will appear and will look something like this:
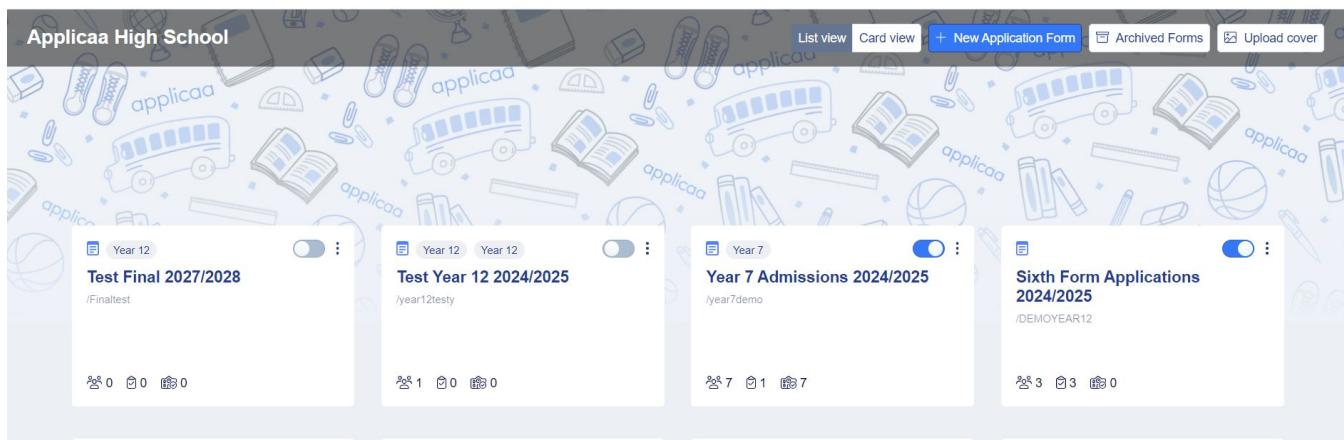
Your new form will already have been created for you (cloned from your previous cycle) and you will see it in this area.
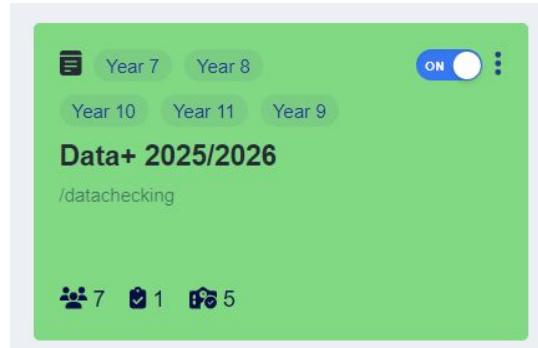
Turn the toggle switch on to make it active - it needs to be active to enable importing/exporting with your MIS.

Please contact us if you believe you should have a Data+ form in your system but it is not visible: 020 3667 0764

Editing your landing page and other messages

Navigate to **settings > form settings > landing page.**

Here you can edit your initial message to parents and check your configuration mode. For data collection, this should be set to "students and parents must be imported by staff".

Any changes you make will only impact your Data Collection form, so other forms will maintain their existing images and messages.

Configuration Mode

Choose your landing page configuration mode:

○ Only students can register ⓘ

○ Students & Parents can register ⓘ

⦿ Students and parents must be imported by staff ⓘ

○ Only parents can register ⓘ

○ New Application area hidden completely

Navigate to "parent homepage" to edit those messages, update your settings and change any images as needed - this is what parents will see once they have logged in.
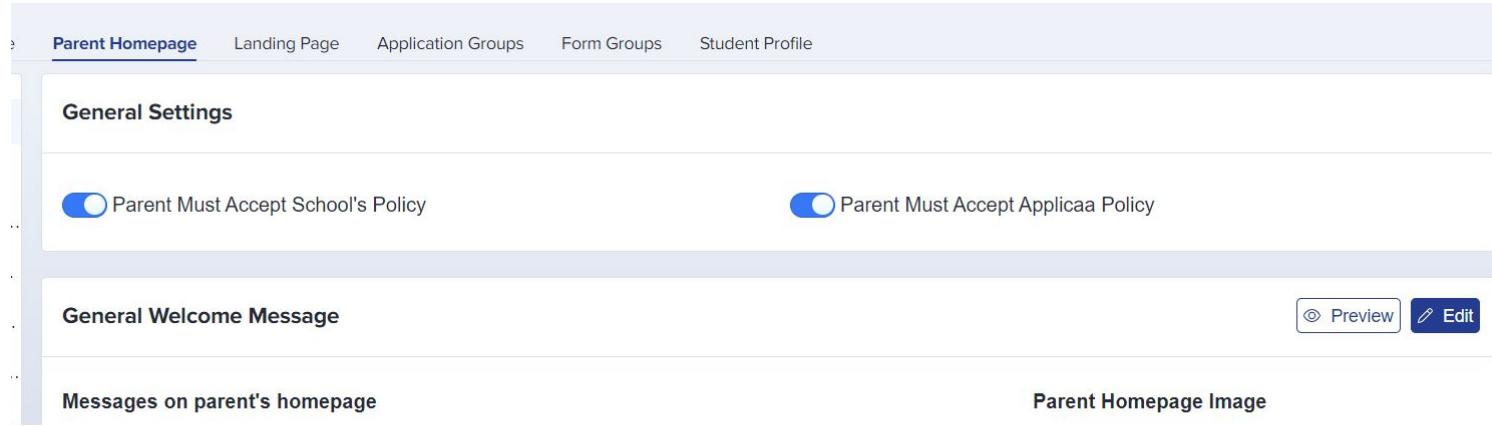
Parent Homepage	Landing Page	Application Groups	Form Groups	Student Profile

General Settings

🔵 Parent Must Accept School's Policy   🔵 Parent Must Accept Applicaa Policy

General Welcome Message   👁 Preview   ✏ Edit

Messages on parent's homepage   **Parent Homepage Image**

The general welcome message is seen by parents across **all intakes**, but there is also a place for you to add a separate, Data Collection-specific welcome message if desired.
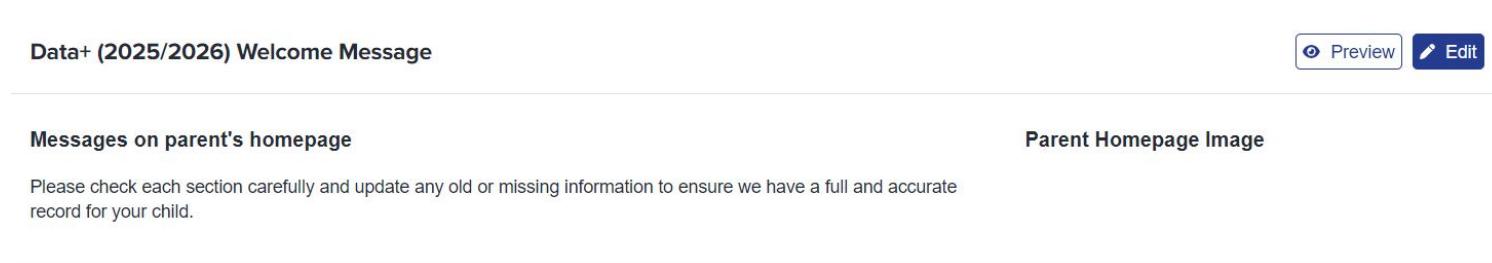
Data+ (2025/2026) Welcome Message   👁 Preview   ✏ Edit

Messages on parent's homepage   **Parent Homepage Image**

Please check each section carefully and update any old or missing information to ensure we have a full and accurate record for your child.

You could consider changing your configuration to suit your intake:

Children Status Config

Button text for new application button	Start New Application
Button text for continue application button	Continue Application

Not in use for Data Collection

Perhaps re-word to "Continue Form"

Also turn off:

- Show offer status
- Show courses you wish to study
- Show reference status

Show Application Status	⬤ (on)
Show Offer Status	◯ (off)
Show Courses You Wish To Study	◯ (off)
Show Reference Status	◯ (off)

Checking your email templates

The email templates area is really useful and can automate a lot of your processes!
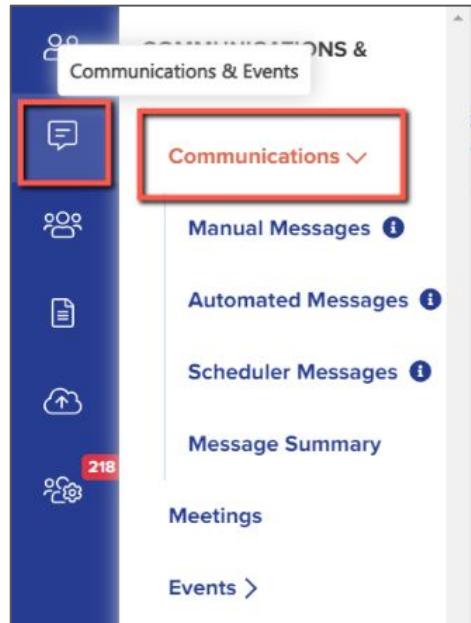
There are 2 automated emails you will need to check - you can preview and edit them by scrolling right on the table.

Top Tip: check all active emails to make sure the wording is appropriate for your purpose - make sure your templates refer to "data collection".

Priorities for checking ahead of launch - filter your "send to" column to "parent":

"Parent Welcome" will be the email you send to them to provide their password and invite them to log in and complete the form.

"Notify Parent Application Complete" can be activated to confirm parents have successfully submitted their form. Change the wording to acknowledge completion of your Data Collection process instead!

Your application phases and settings

Navigate to **settings > application form** to disable any phases not in use fr your Data Collection process (Meetings & Offers).
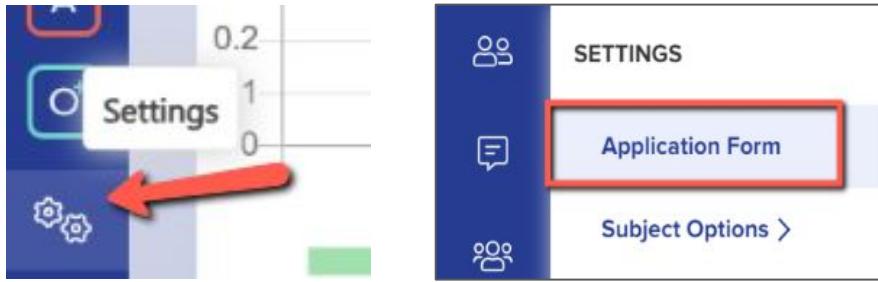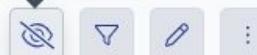
You can also rename the Application Form phase to something more appropriate for your intake, if you like:

Configuring the Form

You can choose which steps to have active and which questions you need parents to confirm the data for.

For Data+ forms, all students will be **internal** as they are on roll at your school.

Make any changes to questions/fields - have you got new User Defined Fields to add in? Are there questions you wish you'd asked applicants last cycle? Now is the time to add those in!

Navigate to **settings > application form** and click on the name of a step to open it, and then select **I want to make more changes** in order to add or amend.

Within your form, make any changes to questions/fields - turn off anything you don't need parents to check/answer, and if there is anything new you need to collect from them, add it in!

Navigate to **settings > application form** and click on the name of a step to open it.

Click "+ New Question" and you will be prompted to choose what you would like to add.

UDFs can write back to your MIS, so they are great for capturing extra data that you don't have to manually input - you'll find them under "Pre-defined questions and fields".

You can also add questions in as "Custom Questions" - these will NOT write back to your MIS.

Here is a link to our form customisation guide.

Add a new question
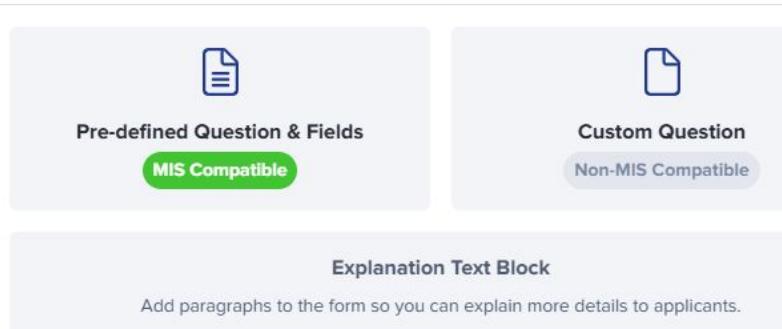
Pre-defined Question & Fields	Custom Question
MIS Compatible	Non-MIS Compatible

Explanation Text Block
Add paragraphs to the form so you can explain more details to applicants.

⌄ **Sims User Defined Fields**

| ☐ student date | sims_udf_45 | Date Picker | SIMS |
| ☐ Test UDF | sims_udf_4018 | Dropdown Single Select | SIMS |

Not seeing your **User Defined Fields**? This will mean you need to make an update in your MIS first and then re-integrate!

Add and activate your UDFs in your MIS, then:

For SIMS, log into your **A+ SIMS App** - it will scan for updates and ask you to carry the updates over into A+.

For Arbor, go to **settings > school settings > integration** and click to **Import UDFs**.
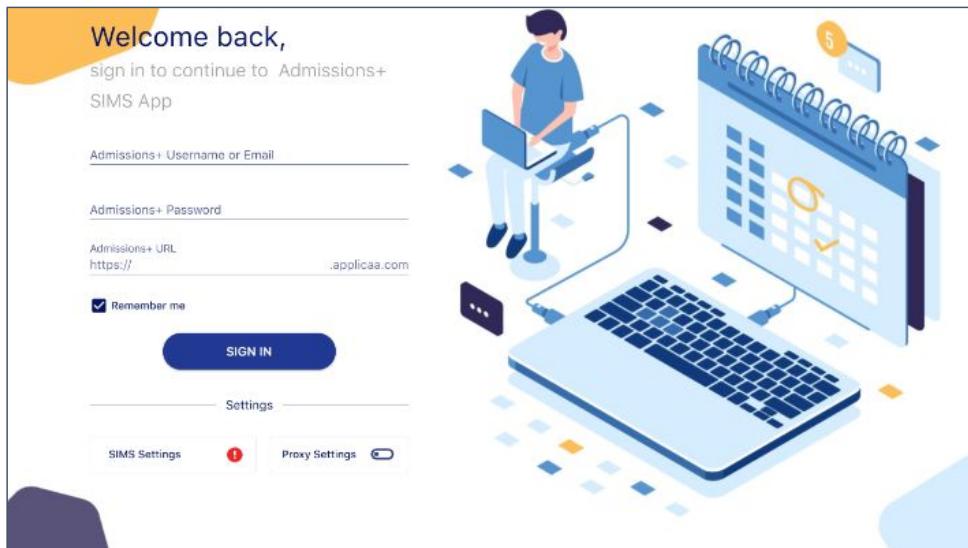
Fields which have your MIS logo mean the data is transferrable into your MIS once you have collected it from the parents.

User-Defined Fields will also write back to SIMS, so you can add any UDFs into your form, as shown on the previous page.

Student Legal Forename	SIMS
(Preferred) Forename	SIMS
Student Middle Names	SIMS

Child's Current Home Address ✏

Question	MIS export
Postcode	Arbor ⓘ
Address 1	Arbor ⓘ

Preview the whole application form as external students to see the form from the perspective of the parent and check if it is all working as expected.

Enable for [OFF] Internal [ON] External

Settings that apply to ALL applicants

1. Would you like applicants to agree to specific policies (e.g., Home School Agreement, Uniform Policy, ICT Policy)? If you select "yes," you will be able to upload the policies below.

Internal	External
○ Yes	○ Yes
● No	● No

Preview this step | **Internal Student** | **External Student**

Additional Questions

Please select the parental consent given for the applicant*

Intimate Care (see here for details)

test. I consent for intimate care to be provided to my child when needed in the event that my child needs to be c soil themselves in school or during any other school activities like Trust/School visits/trips. This will only extend change of clothing. Different procedures will be in place for children with Intimate Care Plans.

○ Yes ○ No

Name - Social Media

○ Yes ○ No

Video

○ Yes ○ No

Photograph - Social Media

○ Yes ○ No

Configure your **address settings** so they migrate correctly into your MIS as per your school's setup.

Navigate to **settings > school settings > address mapping**.

Here is a link to our guide.

You will see the option to configure your address format, test how it appears and apply it to all addresses already in your system to ensure they are formatted correctly ahead of your import!

Configure your **properties** so they are correctly formatted for transfer to your MIS.

first name
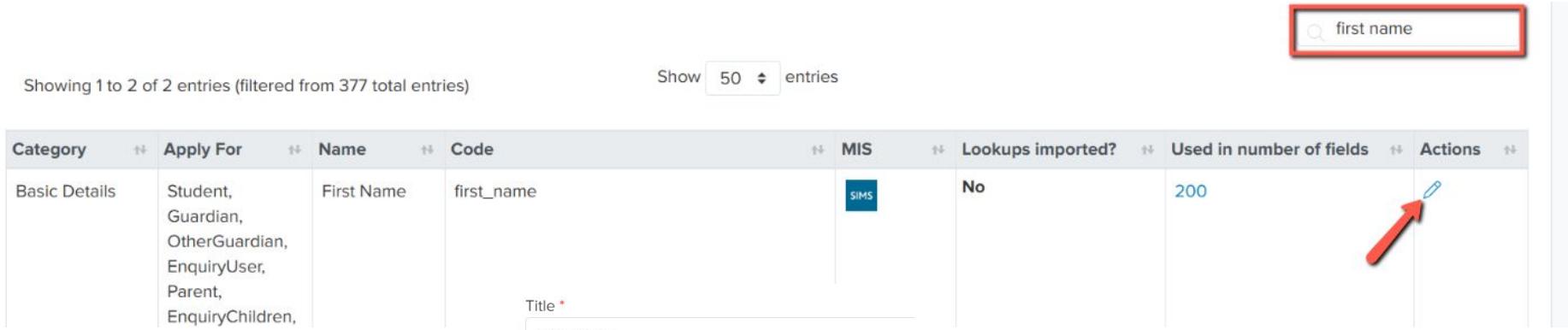
Showing 1 to 2 of 2 entries (filtered from 377 total entries)   Show 50 ⬍ entries

Category	Apply For	Name	Code	MIS	Lookups imported?	Used in number of fields	Actions
Basic Details	Student, Guardian, OtherGuardian, EnquiryUser, Parent, EnquiryChildren,	First Name	first_name	SIMS	No	200	✏️

Navigate to **settings > properties > properties.**

Here's a guide to our properties area.

Title *

First Name

Text format ❗ *

Capitalise First Letter of Every Word ⌄

Texts
none
Capitalise First Letter of Every Word
Capitalise First Letter of Sentence
ALL CAPS
all lower case

You will see the option to configure properties like Postcode formatting to ensure it is entered in ALL CAPS, or format First Name and Last Name to Capitalise First Letters, for example.

Title *

Phone Number

Phone format ❗ *

XXXXX-XXXXXX ⌄

Unique Code: ❗ *

phone_number

Default value: ❗

0_____-_____

Do not include spaces in the number.

Transferring data from your MIS to A+

Important housekeeping:

If any students have previously existed in another form within your Admissions+ system, ensure to archive your old forms from the forms area.

Example:

If you used your system for Year 7 admissions last cycle and you now want parents to complete their Year 8 Data Collection, please ensure last year's form has been archived before proceeding with your Data Collection process.
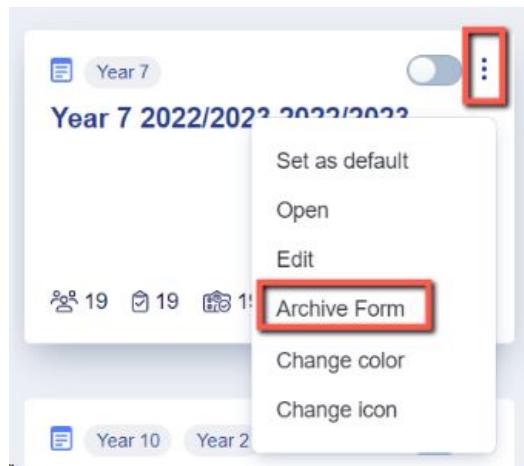
The process of transferring the completed data to your MIS varies.

Check the relevant guide on our Knowledge Base to see the steps specific to your MIS.

If you have any difficulties transferring your data, call us on **020 3667 0764**.

Managing Your Submissions

Use dashboard tiles to track which parents have and have not completed your form, and chase up the incompletes!

Chasing Incompletes

You can chase incomplete forms by sending reminders to the parents - either manually, or by scheduling an automated chaser.

Click the "incomplete" status on your main dashboard.

Select them all using the checkbox and then click "communications" > "send email".

You can then type a message and send to the parents of the selected children, or insert a premade manual template.

Data Checking Form Statuses

6	0	1	0
Incomplete	Awaiting Reference	Completed	Declined
0	0	0	
Withdrawn	Deadline Missed	Waiting List	

Change Application Status	Make Offer	Change Offer Status	Change Enrolment Status	Change Internal Status	Change Phase Status	Add to group	Remove from group	Communications	Reset Passw
Change Colour	☰ Bulk Update	Add to interview	Export To PDF ❶	Confirm Account					

Send Email
Send SMS
Send Reference Requests
Send Custom Email to Referee
Send Notification
Send Student Welcome Email
Send Parent Welcome Email

Showing 1 to 7 of 7 entries   7 rows selected

Show 10 ⬍ entries

☑	ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
☑	20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo
☑	21	JQNX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail.
							School

To schedule an auto-chaser, navigate to **communications and events > communications > automated messages** and click **+ New Message.**

Set your initial configuration and move through the wizard to send the message "when an applicant does something" > "has been incomplete for a certain amount of time".

When a student's form meets these parameters, the email will then be triggered and sent to the parent automatically.

Set Up — Advanced Settings — Email Template

Communication Type *

Email

Template Name ❶ *

Incomplete

Subject Header *

Please complete admission form

Target Audience *

Parent

Set up how would like to send this email here

When applicant does what? *

Automatically when an applicant does something

When applicant does what? *

Has been incomplete for certain amount of time

Select phase applied to *

Data Collection Form

Send after   5   day(s)   0   hour(s)   0   minute(s)

☑ Repeat email after every   5   day(s) until they submit

Moving the completed data to your MIS

Transferring data to and from your MIS

Checks to make ahead of exporting data to your MIS

Data Transfer - SIMS

Data Transfer - Arbor

The process of transferring the completed data to your MIS varies.

Check the relevant guide on our Knowledge Base to see the steps specific to your MIS.

If you have any difficulties transferring your data, call us on **020 3667 0764**.