

Data+ Guide





OVERVIEW

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

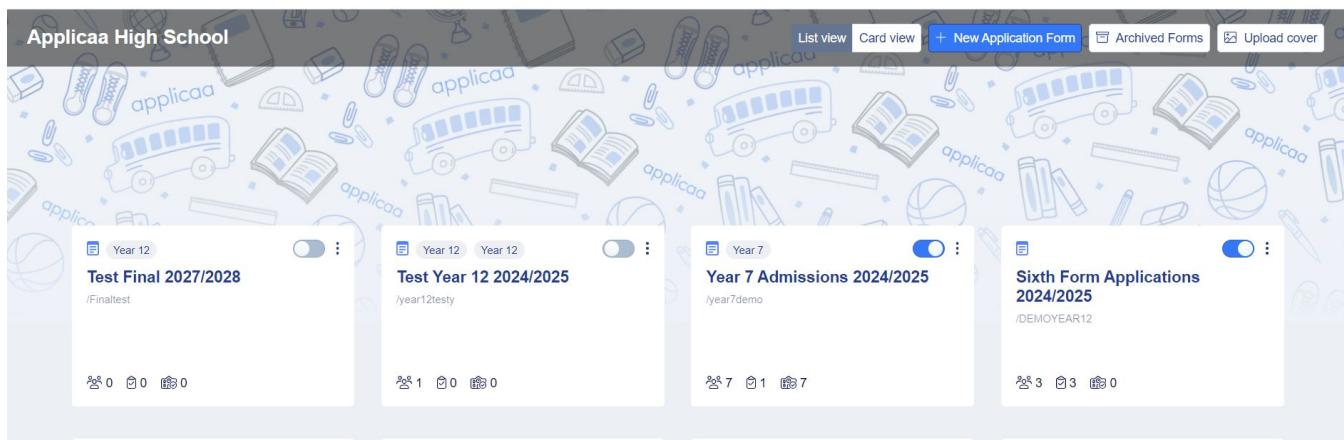
This feature is available to schools which use SIMS or Arbor as their MIS.

How to see your new form

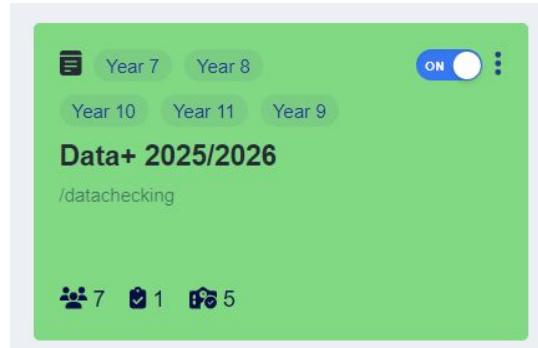
Click on the blue wording in the upper left of your dashboard and then click “forms area/multiple forms”.



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

Landing Page

Customise Texts & Buttons

Show New Application block

New application title

Welcome

Description

To complete the data collection, please log in using the password which was emailed to you.

Admissions⁺
Applicaa High School Test
Powered by applicaa

Existing Users

Username or Email address

lucy.curts@applicaa.com

Password

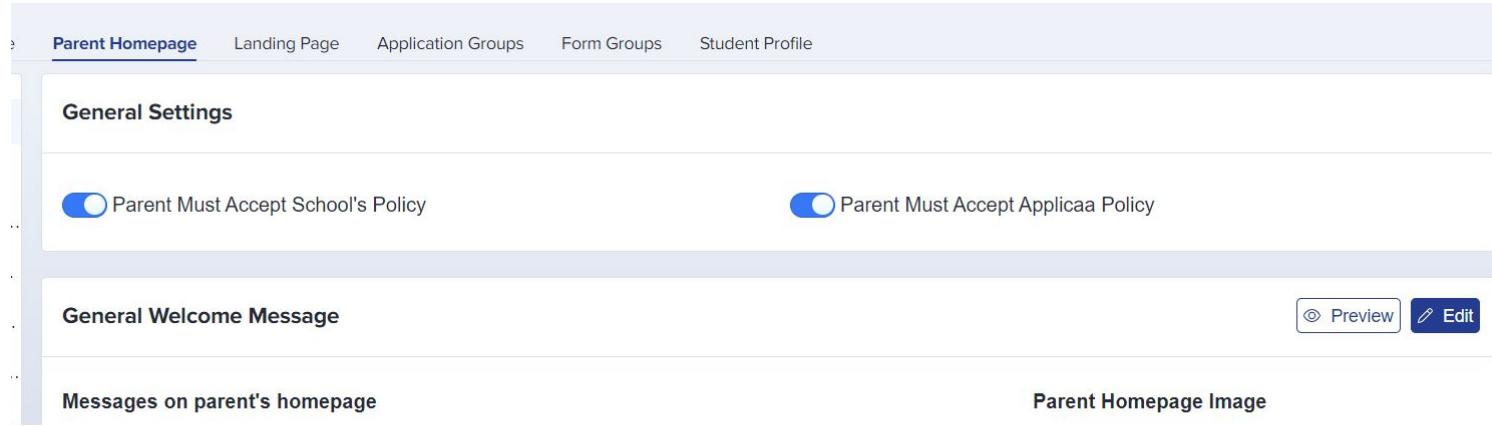
.....

Remember Me

Login

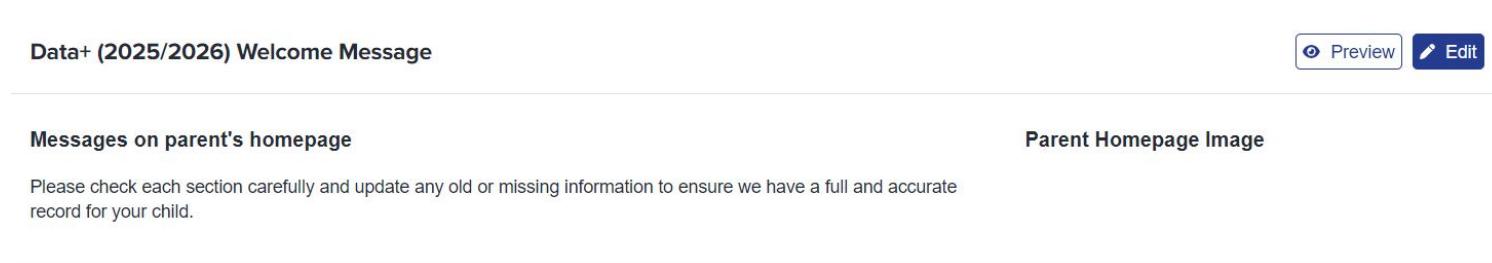
Forgot your password?
Trouble logging in?

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.



The screenshot shows the 'Parent Homepage' settings page. At the top, there are navigation links: Parent Homepage (which is underlined in blue), Landing Page, Application Groups, Form Groups, and Student Profile. Below this, a section titled 'General Settings' contains two toggle switches: 'Parent Must Accept School's Policy' (which is turned on) and 'Parent Must Accept Applicaa Policy' (which is turned on). Under 'General Welcome Message', there is a text area with the placeholder 'Messages on parent's homepage' and a 'Parent Homepage Image' placeholder. To the right of the message area are 'Preview' and 'Edit' buttons. At the bottom of the page, there is a 'Data+ (2025/2026) Welcome Message' section with a 'Preview' and 'Edit' button, and a 'Messages on parent's homepage' section with a 'Parent Homepage Image' placeholder.

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.



The screenshot shows the 'Data+ (2025/2026) Welcome Message' settings page. At the top, there is a 'Messages on parent's homepage' section with a placeholder 'Parent Homepage Image'. Below this, a text area contains the message: 'Please check each section carefully and update any old or missing information to ensure we have a full and accurate record for your child.' To the right of the message area are 'Preview' and 'Edit' buttons.

You could consider changing your configuration to suit your intake:

Children Status Config

Button text for new application button

Start New Application

Not in use for Data Collection

Button text for continue application button

Continue Application

Perhaps re-word to "Continue Form"

Also turn off:

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

Show Application Status



Show Offer Status



Show Courses You Wish To Study

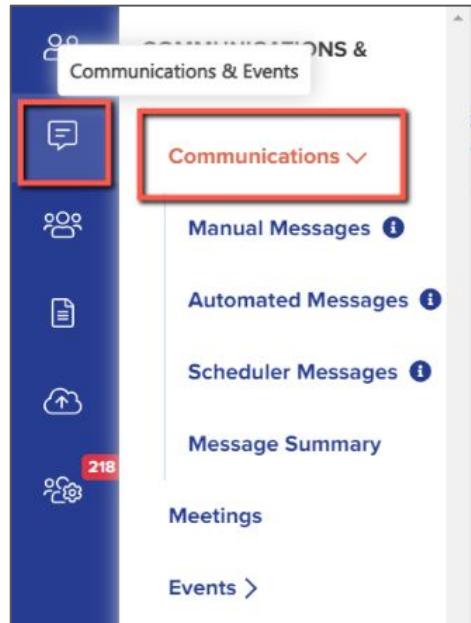


Show Reference Status



Checking your email templates

The email templates area is really useful and can automate a lot of your processes!

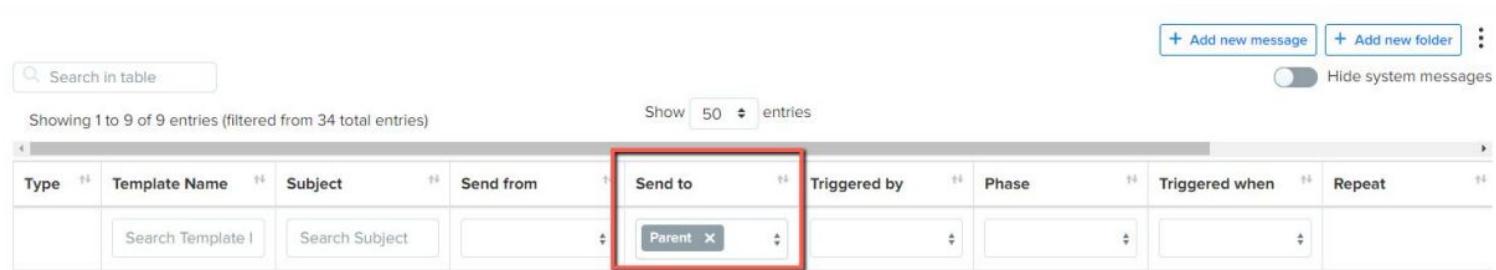


There are 2 automated emails you will need to check - you can preview and edit them by scrolling right on the table.

Created when	Repeat	Enable	Actions
			
to interview	N/A		

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”:



A screenshot of a software interface showing a table of messages. The table has columns for Type, Template Name, Subject, Send from, Send to, Triggered by, Phase, Triggered when, and Repeat. The 'Send to' column is highlighted with a red box, showing the value 'Parent'. The interface includes a search bar, a 'Show 50 entries' dropdown, and buttons for 'Add new message' and 'Add new folder'.

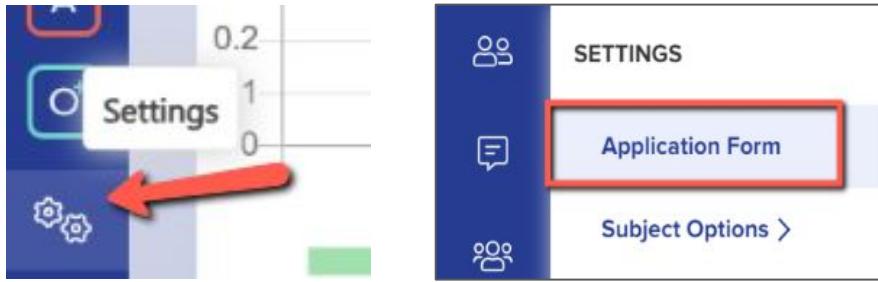
	Parent Welcome	Welcome to Applicaa High School
	Notify Parent Application Complete	<p>[[STUDENT_FIRST_NAME]]</p> <p>[[STUDENT_LAST_NAME]] has completed their application to</p>

“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).



1. Account Creation

2. Data Checking Form

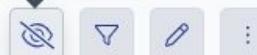


3. Meeting



Disable this phase

4. Offer



You can also rename the Application Form phase to something more appropriate for your intake, if you like:

2. Offer

3. Admission Form

Edit phase details, visibility settings and requirements

Name

Data Checking Form

ON Visible to Staff on Student Profile

Internal Applicants

Lock form after submission i ON

Disable submissions i OFF

External Applicants

Lock form after submission i ON

Disable submissions i OFF

Stand alone i

Trigger by condition

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.

2. DATA CHECKING FORM 9 steps

Visible to Student Visible to Staff Sort Steps Add Step

Step	Action	Internal	External	Student Profile
Step 1: Student Basic Details	<input checked="" type="button"/> <input type="button"/>	<input checked="" type="button"/> ON	<input checked="" type="button"/> ON	<input checked="" type="button"/> ON
Step 2: Parent/Carer Details	<input checked="" type="button"/> <input type="button"/>	<input checked="" type="button"/> ON	<input type="button"/> OFF	<input checked="" type="button"/> ON
Step 3: Support Information	<input checked="" type="button"/> <input type="button"/>	<input checked="" type="button"/> ON	<input type="button"/> OFF	<input checked="" type="button"/> ON
Step 4: Agreement	<input type="button"/> <input checked="" type="button"/>	<input type="button"/> OFF	<input type="button"/> OFF	<input checked="" type="button"/> ON

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.

Customise Application Journey

All Phases Sort Phases

Build your student application process step by step. Arrange phases in order, choose what students can see, and add your school's requirements. Your changes save automatically.

1. Account Creation

2. Offer

3. Admission Form

4. Meeting

Click any phase below to open it and customise the steps students will complete. Add or remove phases to fit your school's process.

1. ACCOUNT CREATION 3 steps ^

2. OFFER 0 steps ^

3. ADMISSION FORM 9 steps ^

Step 1: Student Basic Details Visible to Student

Step 2: Support Information

Step 3: Agreement

Student Basic Details

Allowing new registrations OFF Open Full View

Enable for Internal External

Settings that apply to ALL applicants

1. Would you like to collect phone numbers from applicants during registration?

Internal External

Yes Yes

No No

2. Which number would you like to collect from

Preview this step Internal Student External Student

Student Basic Details

Please upload a recent passport-style photograph of yourself Max 250MB

Legal First Name* Legal Last Name*

I want to make more changes



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.

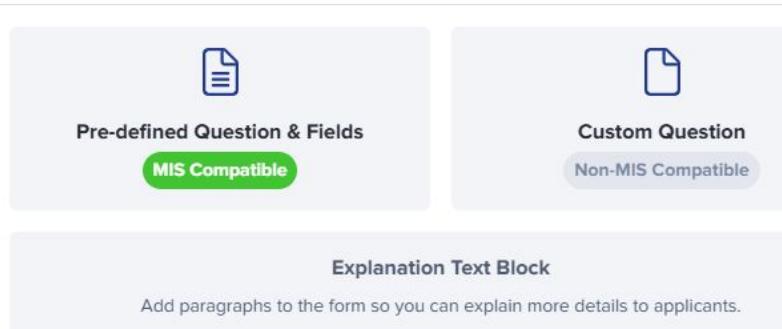
Click “+ New Question” and you will be prompted to choose what you would like to add.

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
MIS Compatible

Custom Question
Non-MIS Compatible

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

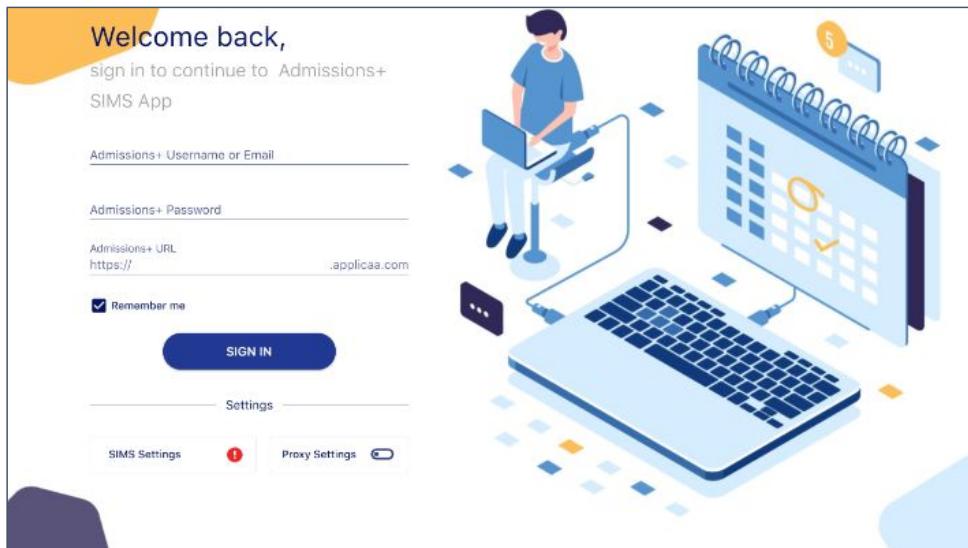
▼ Sims User Defined Fields			
<input type="checkbox"/> student date	sims_udf_45	Date Picker	SIMS
<input type="checkbox"/> Test UDF	sims_udf_4018	Dropdown Single Select	SIMS

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**.



The image shows the 'School Settings' page in Arbor. The 'Integration' tab is highlighted with a red box. Under the 'MIS Setting' section, 'Integration Platform' is set to 'Arbor'. There are two disabled checkboxes: 'Import new MIS lookups as visible' and 'Enable saving to MIS School Names typed by applicants'. In the 'MIS Credentials Validation' section, a green message states 'Arbor credentials are valid.' At the bottom, there are two buttons: 'Download Lookup Values' and 'Import UDFs', with a red arrow pointing to the 'Import UDFs' button.

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	
(Preferred) Forename	
Student Middle Names	

Child's Current Home Address 

MIS export

Question	
Postcode	
Address 1	

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 Internal 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
<input type="radio"/> Yes	<input type="radio"/> Yes
<input checked="" type="radio"/> No	<input type="radio"/> 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 1
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.

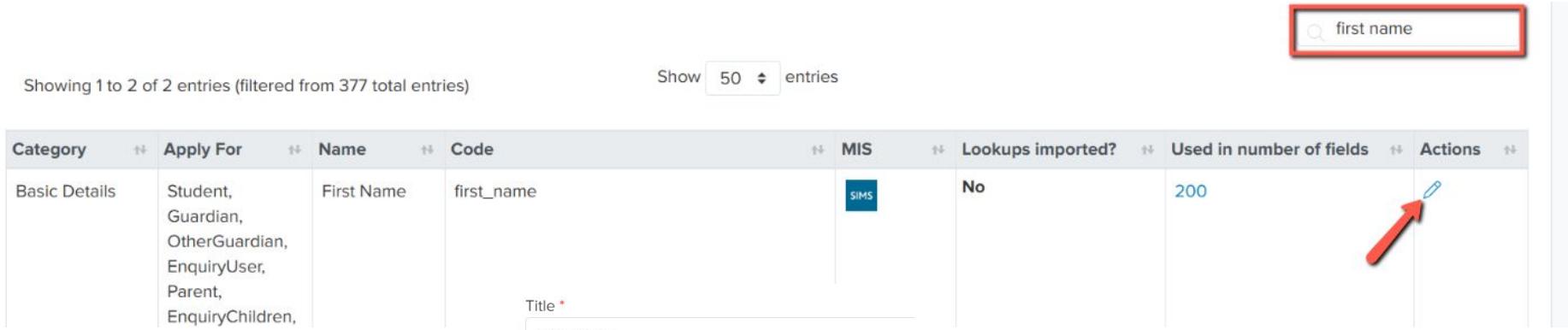
The screenshot shows two panels. The left panel, titled 'Address Block Configuration', contains fields for Address 1, Address 2, Address 3, Town/City, County/State, Country, and Postcode, each with a placeholder like '<line 1>' or '<post_town>'. Below these is a radio button group for 'ALL CAPS' and 'Normal Case', with 'Normal Case' selected. A red box highlights the 'Test' button in a 'Enter a postcode to test:' input field, which contains '2 Westfield Road, Wiggin...'. The right panel, titled 'Preview', shows the same address fields with the input '2 Westfield Road' tested, resulting in the output '2 Westfield Road' for Address 1 and 'Wiggin...' for Address 2. Buttons for 'Apply to Existing Addresses' and 'Report' are at the top of the right panel, with 'Apply to Existing Addresses' highlighted by a red box.

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.



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.

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 *

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

Title *

Phone format ⓘ *

Unique Code: ⓘ *

Default value: ⓘ

Do not include spaces in the number.

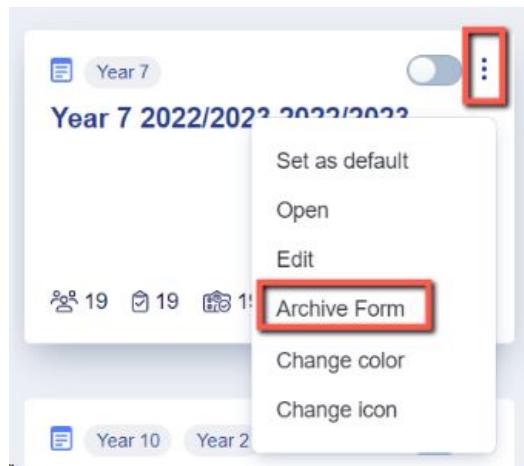
Transferring data from your MIS to A+

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.



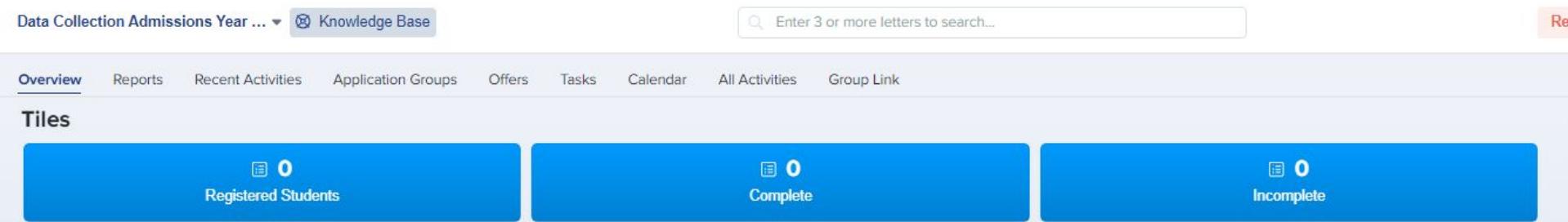
The process of transferring the completed data to your MIS varies.

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!



The screenshot shows a software interface with a navigation bar at the top. The top left shows 'Data Collection Admissions Year ...' with a dropdown arrow, and 'Knowledge Base' with a magnifying glass icon. The top right has a search bar with the placeholder 'Enter 3 or more letters to search...' and a red 'Re' button. The navigation bar includes links for Overview, Reports, Recent Activities, Application Groups, Offers, Tasks, Calendar, All Activities, and Group Link. Below the navigation bar is a section titled 'Tiles' with three blue rectangular cards. The first card on the left is for 'Registered Students' and shows a document icon with '0' and the text 'Registered Students'. The middle card is for 'Complete' and shows a document icon with '0' and the text 'Complete'. The third card on the right is for 'Incomplete' and shows a document icon with '0' and the text 'Incomplete'.

Data Collection Admissions Year ... ▾ Knowledge Base

Enter 3 or more letters to search...

Overview Reports Recent Activities Application Groups Offers Tasks Calendar All Activities Group Link

Tiles

Registered Students

Complete

Incomplete

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.

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 ① *

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 day(s) hour(s) minute(s)

Repeat email after every 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**.