

Meetings, Offers & Timetabling



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Setting up a Meeting

Communications & Events > Meetings

Click to Create new meeting.

Search for meeting...



+ Create new meeting

Complete the initial setup step by adding the title and description of the meeting. You also have the option to add an **Internal Meeting Name** - visible to staff only.

Set Up

Title (keep it user-friendly, this will appear in your email invitation) *

Guidance Meetings

Internal Meeting Name ⓘ

Meetings for High Achievers

Description (keep it user-friendly, this will appear in your email invitation) *

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

Decide how you would like appointments to be scheduled, and configure the corresponding email templates:

How will the meeting be scheduled?*

Applicants will be invited to choose their own meeting slots

Staff will assign meeting slots before sending out invitations.

Attendee Actions

Allow attendees to cancel or reschedule their meeting slots. Confirmation emails will be sent automatically to notify staff of changes.

Should attendees be able to cancel their slot?

Yes

No

Invitation Email* i

CC Parent 

Email Subject Header

Invitation to Guidance Meeting

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Important: Changes made to the email templates in this section will only apply to this meeting. To update the master template (used across all new meetings), please go to the [Automated Messages](#) area in Communications.

Paragraph 

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

Your Sixth Form Guidance Meeting has been scheduled as below:

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Add to Calendar: [{{ADD_TO_CALENDAR}}](#) 

Confirmation Email* i

CC Parent

Email Subject Header

Guidance Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Important: Changes made to the email templates in this section will only apply to this meeting. To update the master template (used across all new meetings), please go to the [Automated Messages](#) area in Communications.

Paragraph 

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

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Add to Calendar: [{{ADD_TO_CALENDAR}}](#)

Note that in the configuration which allows applicants to choose their own appointment, you are also able to set whether or not they are able to reschedule their slots themselves.

How will the meeting be scheduled?*

Applicants will be invited to choose their own meeting slots Staff will assign meeting slots before sending out invitations.

Attendee Actions

Allow attendees to cancel or reschedule their meeting slots. Confirmation emails will be sent automatically to notify staff of changes.

Should attendees be able to cancel their slot?

Yes No

Should attendees be able to reschedule their slot? ⓘ

Yes No



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 

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 

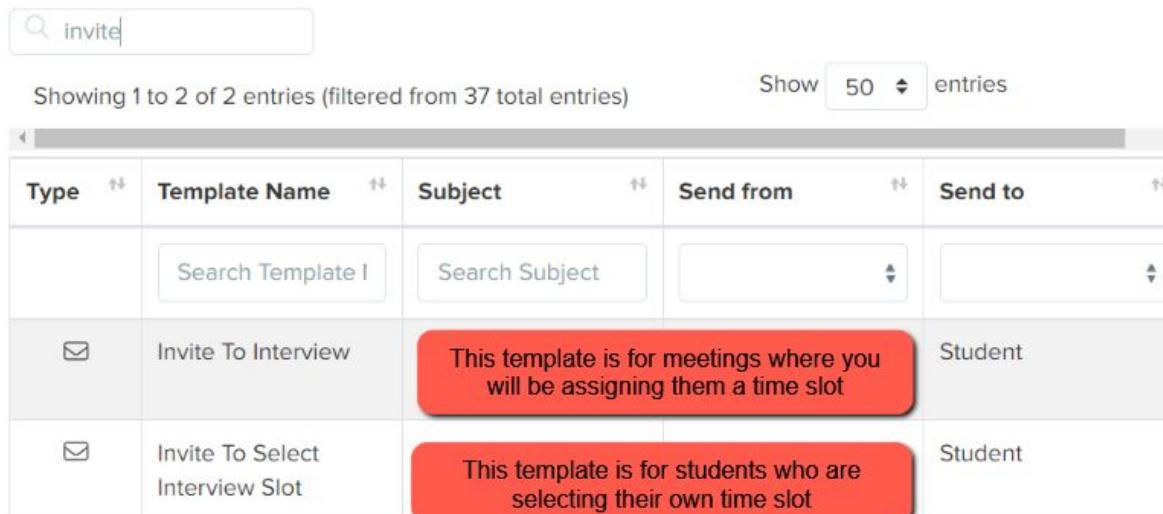
Dear {{{STUDENT_FIRST_NAME}}} {{{STUDENT_LAST_NAME}}}

Thank you for applying to {{{SCHOOL_NAME}}}.

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

When you customise the email templates within a meeting, those changes are applied to that specific meeting only.

You can check and amend the master copies of your invitation templates by navigating to **communications and events > communications > automated messages**.



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

Type	Template Name	Subject	Send from	Send to
	Search Template I	Search Subject		
✉	Invite To Interview	This template is for meetings where you will be assigning them a time slot		Student
✉	Invite To Select Interview Slot	This template is for students who are selecting their own time slot		Student

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

Create Question Lists

Would you like to specify particular questions to be asked or completed by the staff **during** the meeting?

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

Questions	Required & Visible	Action
Interested Course 1 (interview_template_35_interested_course_1)	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Interested Course 2 (interview_template_35_interested_course_22)	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Interested Course 3 (interview_template_35_interested_course_33)	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Do you think the student is eligible to take the selected courses? (interview_template_35_do_you_think_the_student_is_eligible_to_take_the_selected_courses)	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Save as questions list template **+ New questions**



Any questions you add can be saved as a template, for you to use again in subsequent meetings.

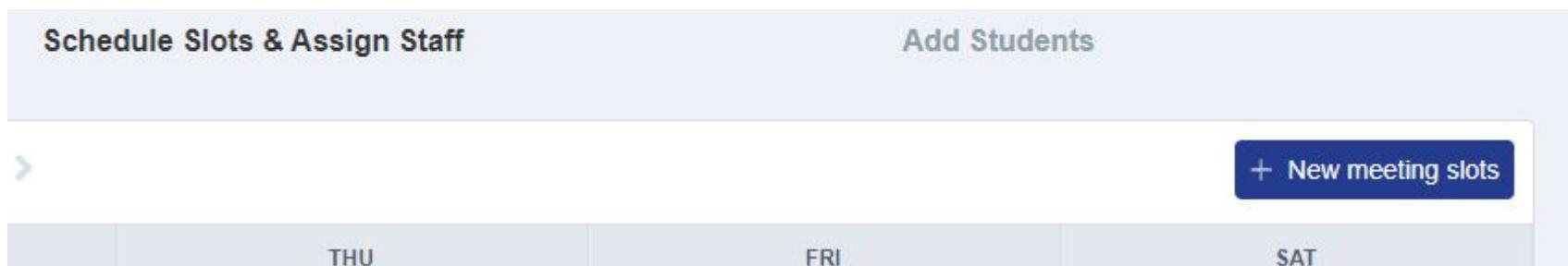
These questions are visible to the staff conducting the meetings, and are not shared with the applicant at any time.

You can also view question templates you have previously made (from last year, for example) and assign those questions to any new meetings you are creating.



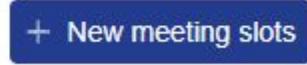
Question Templates				
<input type="text"/> Search in table				
Title	Description	Creator	Questions	Actions
STUDENT INTERVIEW	Student's Interview	Demo Applicaa	0	 View  Edit 

Move on to schedule the appointment slots and assign staff using the **New meeting slots** button.



Schedule Slots & Assign Staff

Add Students

 + New meeting slots

THU	FRI	SAT
-----	-----	-----

Add new meeting slots

SAT

Start date	31/10/2023
Start time	16 : 51
End time	16 : 51
Set up as repeating slots?	Yes
Repeat on	Tuesday X Thursday X
Repeat ends	22/12/2023
Length of each slot	minute(s)
Gap between slots	minute(s)
Number of attendees per slot	1 student(s)

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.

You'll then be able to 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			1
<input type="checkbox"/>	Wednesday, 13/12/2023	15:45	16:00			10

December 2023

WED	
13	14
15:30 - 18:30	1
⌚ 12	

The meeting will then be displayed on the calendar, and you can repeat the process to add as many more meetings as needed (perhaps each member of staff has their own series of appointments, and/or you are holding your meetings over multiple days and times).

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.

All meeting slots [All](#) 12 [Added](#) 0 [Invited](#) 0 [Confirmed](#) 0 [Completed](#) 0 [Incomplete](#) 0 [Not Attended](#) 0 [Not Confirmed](#) 0 [Canceled](#) 0

[Make Offer](#) [Change Offer Status](#) [Communications](#) [Reset meeting status](#) [Add to group](#) [Remove from group](#) [Remove students](#) [+ Add students](#)

Add new students to the meeting 

Student

Type here to search for students

Group

Type here to search for groups

Filter

Select a filter

Add to meeting

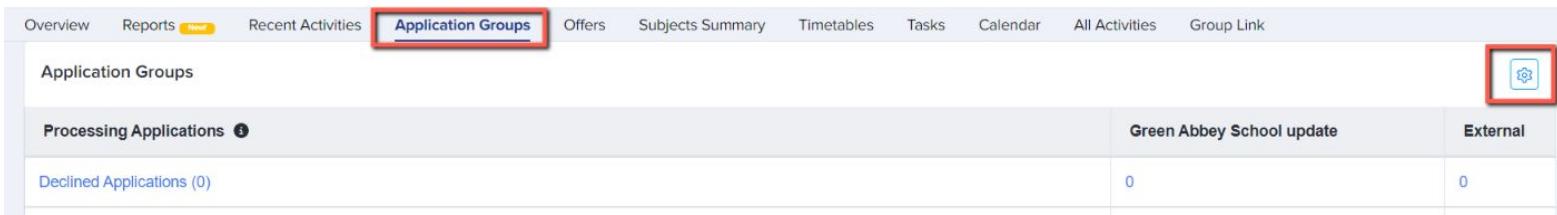
Depending on your setup, you will either be prompted to **invite students** (if they are choosing their own slots) or **allocate students and then invite them** (if you are assigning appointments for them prior to sending the invitations).

When you click to invite the students, you will be shown the email template again so you can check it before clicking "send".

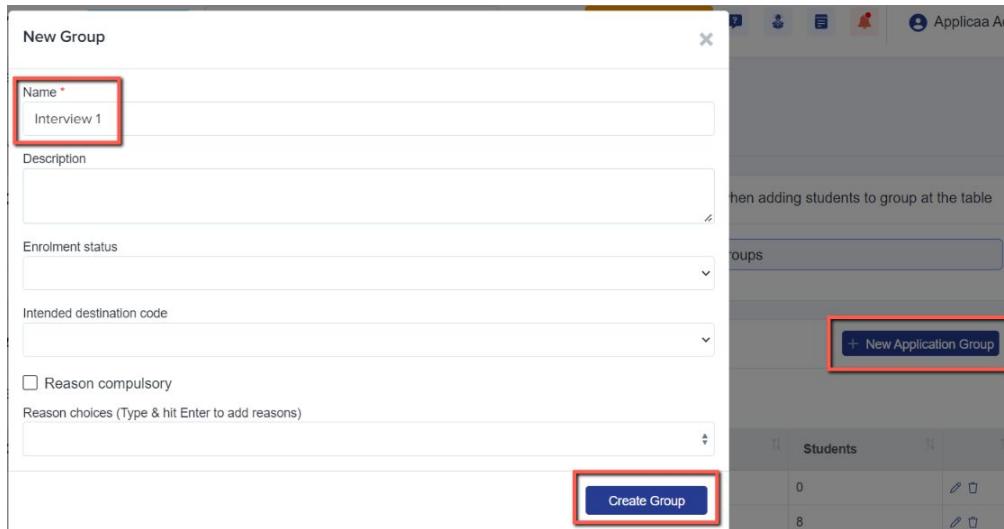
Adding students to application groups

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 and then click the settings cog on the top right of the table:



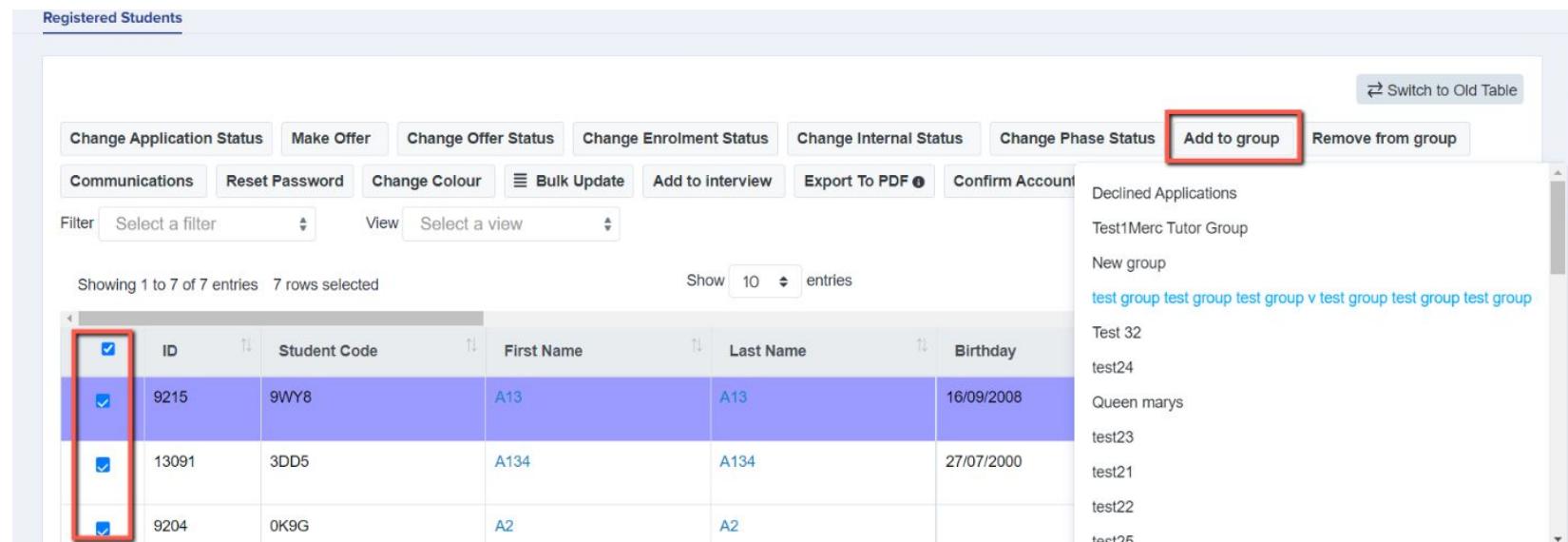
The screenshot shows a navigation bar with tabs: Overview, Reports, Recent Activities, Application Groups (which is highlighted with a red box), Offers, Subjects Summary, Timetables, Tasks, Calendar, All Activities, and Group Link. To the right of the table, there is a small settings cog icon with a red box around it.



The screenshot shows a 'New Group' dialog box. The 'Name' field is filled with 'Interview 1' and has a red box around it. At the bottom right of the dialog box is a 'Create Group' button, which also has a red box around it.

Then click “+ New Application Group”, give it a name and press “create 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:



Registered Students

Change Application Status Make Offer Change Offer Status Change Enrolment Status Change Internal Status Change Phase Status Add to group Remove from group

Switch to Old Table

Communications Reset Password Change Colour Bulk Update Add to interview Export To PDF Confirm Account

Declined Applications

Test1Merc Tutor Group

New group

test group test group test group v test group test group test group

Test 32

test24

Queen marys

test23

test21

test22

test25

	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	

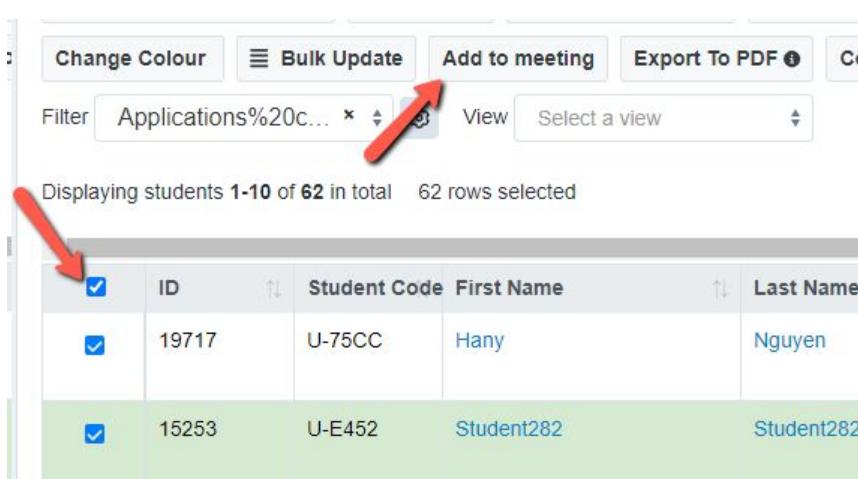
Return to the meetings area to add your group to the meeting - this does not send an invitation to them automatically, so you can add students in prior to being ready to invite them!

Adding students to a meeting from your main dashboard

Select a tile or a category, to load a list of students.

Select the students you want to add to a meeting and choose “add to meeting”.

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

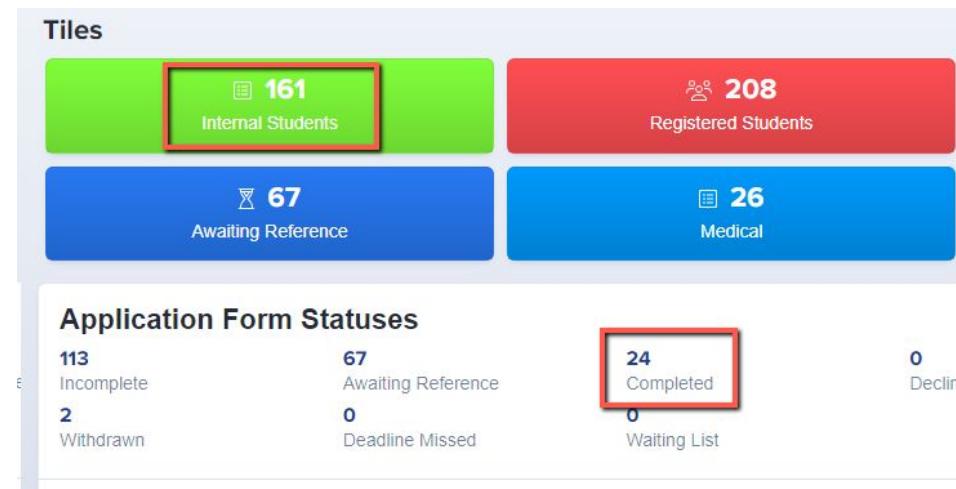


Change Colour Bulk Update Add to meeting Export To PDF ⓘ

Filter Applications%20c... View Select a view

Displaying students 1-10 of 62 in total 62 rows selected

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



Tiles

161 Internal Students	208 Registered Students
67 Awaiting Reference	26 Medical

Application Form Statuses

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

Inviting applicants to meetings

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

You will be notified if you have added any students to the meeting, 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](#)

 **Send Invitations**

 **Send Invitations (no email)**

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 meeting templates you checked and amended when setting up your meeting, 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 students an invitation (ie put the “accept” and “decline” buttons on the student’s homepage), without sending them the invitation email template.

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

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.

⚠ You have 4 invited applicant(s) that have not yet confirmed their slot View details

Meeting slots All | 24 Confirmed | 1 Completed | 1 Incomplete | 0 Did not attend | 0 Cancelled | 0 Declined | 0

Make Offer Change Offer Status Communications Reset meeting status Add to group Remove from group Remove students + Add students

Displaying 24 slots Show 50 entries Search in table Export

<input type="checkbox"/>	Meeting Date	Time	Username	School	Room	Application Status	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status	Action
<input type="checkbox"/>	20/09/2024	09:00 - 09:20	test@joyce.com				Offer Made	Pending		Completed	invited	✉️ 📝 📅 ✖
<input type="checkbox"/>	20/09/2024	09:20 - 09:40	l.a.gordon				Pending	Pending	Test	Not confirmed	invited	✉️ 📝 📅 ✖

You can also see a log of activities relating to meetings on the profiles of the applicants, under the **Meetings** tab.

Frederick Johnston #U-IG1QJ



Phone 32844406206
School Putney High School
Email

APPLICATION STATUS Demo **Completed** 4/4

ENROLMENT STATUS Demo **Pending**

Overview Application Form Enrolment Form Concessions and Bursary Activities **Meeting** Courses Selection Family

Meetings

Jan 12 MON 09:00 - 09:15 Sixth Form Office Test Staff Not confirmed

Guidance Meetings
Meet with the Sixth Form team to discuss your subject choices and career aspirations.

Meeting Note

Meeting Activities 1

28 Oct, 2025 10:18 Lucy Curtis added Frederick Johnston to the meeting: **Guidance Meetings**

On your dashboard, access a list of students to see the student table. From there you can see their **meeting count** - how many meetings they have been added to. Click on the number to see which meeting(s) they belong to, and the status of each meeting.

Displaying students 1-10 of 25 in total

Show 10 entries



<input type="checkbox"/>	Id	First Name	Last Name	User code	Telephones and Em...	Meeting Count
<input type="checkbox"/>	0199ddd9-5 977-7ef9-a3	Test Leighann	Test Sauer	U-1F2ZW	student39b29d9b4fc6d10d@admp.uk	0
<input type="checkbox"/>	01999fff-a2 c2-7604-a2	TestLucy	TestCurtis	U-BN6P9	lucy.curtis+7@applcaa.com	0
<input type="checkbox"/>	01996270-0 fe3-7c8b-80	Test Victor	Test Swift	U-BU96T	student39d939de72b4a746@admp.uk	1

Meetings for Test Victor Test Swift



Date	Time	Meeting	Location	Teachers	Status
12 Jan 2026	11:15 - 11:30	Guidance Meetings Meet with the Sixth Form team to discuss your subject choices and career aspirations.	Sixth Form Office	Test Staff	Not confirmed

Tracking responses to invitations

Hello Test Victor,



Test Victor Test Swift Student Code: U-BU96T

School: student39d393de72b4a746@admp.uk / 30927608512

Form Status

Completed

Offer status

Pending

Reference Status

Incomplete

Subjects you wish to study

A Level PE, A Level Sociology, A Level Psychology

GUIDANCE MEETINGS

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

12/01/2026 11:15 - 11:30

Sixth Form Office

[Decline](#)

[Accept](#)

Guidance Meetings

All | 12

Added | 6

Invited | 6

Confirmed | 0

Completed | 0

Incomplete | 0

Not Attended | 0

Not Confirmed | 6

Canceled | 0

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

You can track their responses using 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](#)

Based on your meeting configuration, applicants may have the option to cancel their meeting, and/or reschedule their appointment (this is available in meetings where you allow them to choose their own date and time).

GUIDANCE MEETINGS Accepted

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

📅 12/01/2026 09:00 - 09:15

📍 Sixth Form Office

[Cancel Meeting](#)

GUIDANCE MEETINGS Accepted

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

📅 13/01/2026 09:40 - 10:00

📍 Sixth Form Office

[Cancel Meeting](#) [Reschedule](#)

Cancel Meeting

Reason for cancellation (required)

Please type YES in the box to confirm.

Confirm **Cancel**

Reschedule Meeting

Please select a new date

Select a new time

Reason for rescheduling (optional)

Reschedule **Cancel**

How to proceed if a student 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 add them to a new one instead.

Are they declining because they no longer wish to continue their application to your school?

Here's how to update a student's status to withdrawn, or delete their account from your system.

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

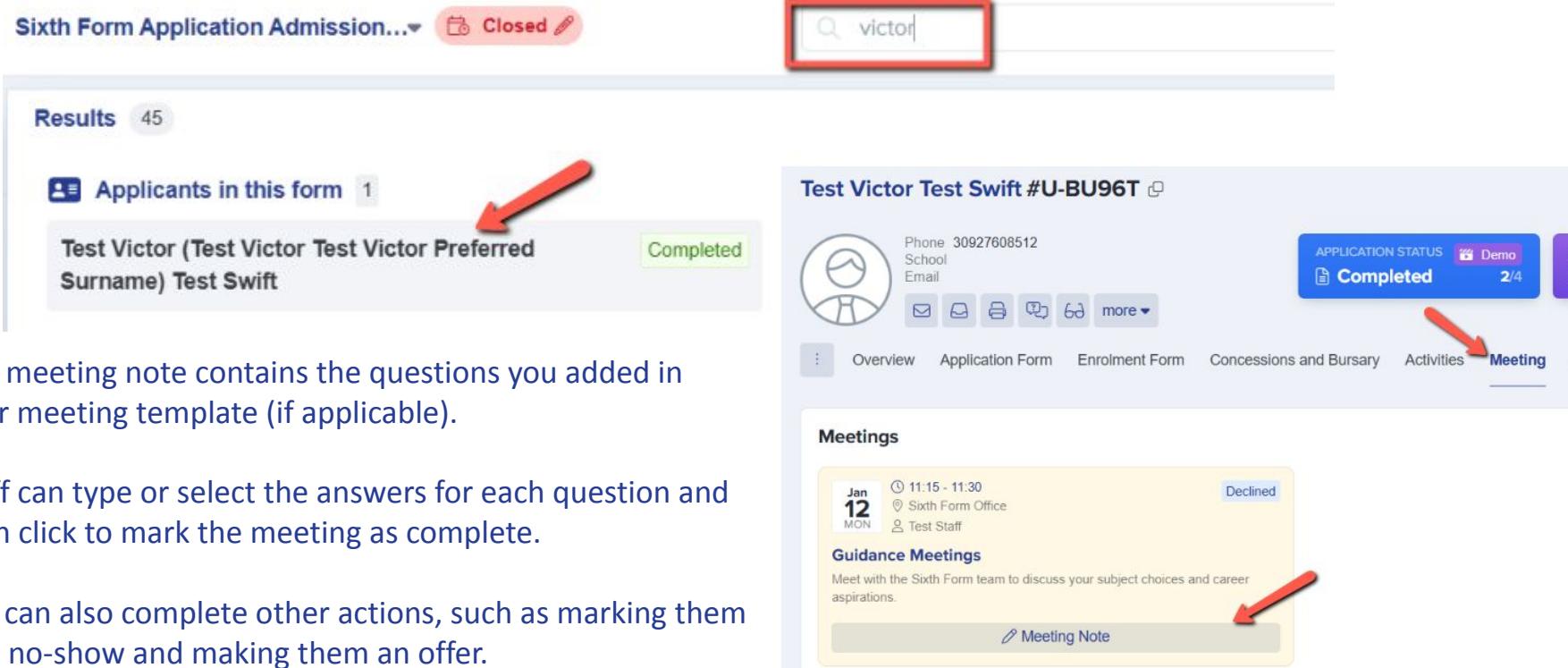
👤

👤 1 / 13



Conducting your meetings

You can search for the applicant in the search bar and load their profile, and then click on their **Meeting** tab to see their meeting(s) and access their meeting notes.



The screenshot shows the application system interface. At the top, a search bar contains the name 'victor', highlighted with a red box and arrow. Below the search bar, the results for 'Sixth Form Application Admission...' show 45 applicants. One applicant, 'Test Victor (Test Victor Test Victor Preferred Surname) Test Swift', is highlighted with a red arrow. The 'Completed' status is shown next to the applicant's name. To the right, the applicant's profile for 'Test Victor Test Swift #U-BU96T' is displayed. The profile includes basic information like phone number (30927608512), school, and email. Below the profile, the 'APPLICATION STATUS' is 'Completed' with a 'Demo' label. The 'Activities' tab is selected, highlighted with a red arrow, and the 'Meeting' sub-tab is also highlighted with a red arrow. The 'Meetings' section shows a meeting scheduled for Jan 12 (Monday) from 11:15 - 11:30 in the Sixth Form Office, marked as 'Declined'. A 'Meeting Note' button is also highlighted with a red arrow.

Sixth Form Application Admission... Closed

Results 45

Applicants in this form 1

Test Victor (Test Victor Test Victor Preferred Surname) Test Swift Completed

Test Victor Test Swift #U-BU96T

Phone 30927608512
School
Email

APPLICATION STATUS Demo
Completed 2/4

Overview Application Form Enrolment Form Concessions and Bursary Activities **Meeting**

Meetings

Jan 12 MON 11:15 - 11:30 Sixth Form Office Declined

Guidance Meetings

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

Meeting Note

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

Staff can type or select the answers for each question and then click to mark the meeting as complete.

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

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

Meeting slots

All 42 Allocated 42 Invited 0 Not Confirmed 42 Confirmed 0 Completed 0 Incomplete 0 Not Attended 0 Canceled 0 Declined 0

Make Offer Change Offer Status Communications Reset meeting status Add to group Remove from group Remove students  + Add students

Search in table Export

Displaying 42 students

Show 50 entries

Meeting Date	Time	Teacher	Type of student	First Name	Last Name	Student Code	Email/Username	School	Room	Offer Status	Enrolmen	Action
02/02/2023	10:20 - 10:30	Tutor Demo	Internal	Ajoh	116684	U-5C86	student+116684@example.com	Greenford High	Room B	Pending	Pending	   

If you have lots of appointments scheduled, on various days and for multiple staff, make use of the **filter** function to narrow the list, to see only the relevant appointments.

 + Create new meeting

View details

Not attend 0 Cancelled 0 Declined 1

Add to group Remove from group Remove students  + Add students

Search in table Export

Student Code	Email/Username	Action
J-IG1QJ	testfrederick.testjohn@examp... 87/10/2024	   

Staff member:

Type here to search for teacher name

Date range:

28/10/2025 → 28/01/2026

--:--  → --:-- 

[Resend invitation](#)
[Meeting cancelled](#)
[Mark as No-show](#)
[Pending](#)

Application Form

Education

School History

Swallows Nursery (current)
25/02/2024 -

Please enter your predicted GCSE grades. You can get these predicted grades by speaking with your subject tutors, your form tutor or Head of Year

Exam	Grade	Status	Grade by Referee
Polish	9	Predicted	
English Language	8	Predicted	
Engineering	7	Predicted	
Creative Digital Media Production	L2M	Predicted	
Biology	6	Predicted	

State exam results

First Media Reference Details

[Manage pins](#)
[View full application](#)

Courses

Course Options

Subjects you wish to study

- 1 A Level Physics
- 2 A Level Chemistry
- 3 A Level Law

Offer List

Meeting Questions

Are we the first choice for this student? *

Where else have they applied to study? *

What is their career aspiration? *

Have they chosen subjects suitable for their career aspiration? *

Are any course changes needed? Please detail any to remove/add *

See their meeting details including their appointment time, and the questions you have set for your staff members to ask during the session (if applicable).

[Manage pins](#)[View full application](#)

Application Form

Courses

Course Options

Subjects you wish to study

- 1 A Level Product Design
- 2 A Level Drama
- 3 A Level Chemistry
- 4 A Level Biology

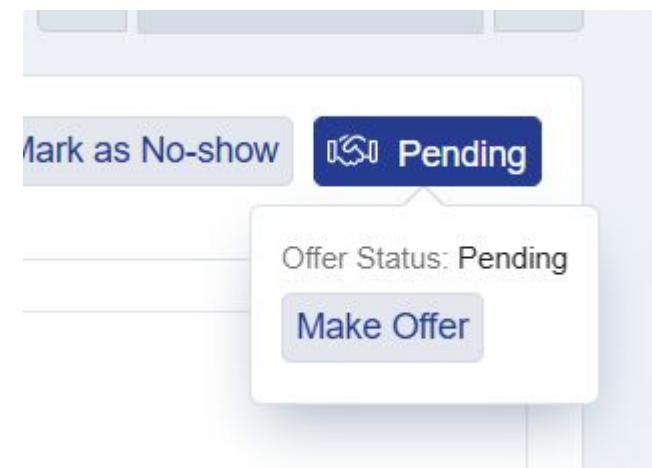
Offer List

- 1 A Level English Literature
- 2 A Level French
- 3 A Level Chemistry

[Add to offer list](#)

Control what is visible on the meeting area using the **manage pins** button.

You can display the subjects they applied for, and also confirm which subjects you are willing to offer to them, and then make them their offer, as part of your meeting process.



You are able to mark meetings as complete as a bulk action if required, from your meetings area.

← Guidance Meetings

⚠ You have 9 invited applicant(s) that have not yet confirmed their slot

Meeting slots

- All | 28
- Allocated | 10
- Invited | 9
- Not Confirmed | 9**
- Confirmed | 0
- Completed | 0

Change meeting status (highlighted with a red arrow)

Make Offer Change Offer Status Communications

Displaying 9 slots 9 rows selected

Show 50 entries

<input checked="" type="checkbox"/>	Meeting Date	Time	Teacher	Type of student	First Name
<input checked="" type="checkbox"/>	12/01/2026	09:00 - 09:15	Test Staff	External	Frederick
<input checked="" type="checkbox"/>	12/01/2026	09:15 - 09:30	Test Staff	External	Porter

Change Meeting Status

Select a meeting status

- Did not attend
- Not confirmed
- Completed**
- Confirmed
- Declined
- Cancelled appointment
- Incomplete

Add the Meeting phase to your application journey

You have the option to make meetings a necessary part of the application cycle, so that applicants who do not complete a meeting are unable to proceed any further (to Offers, Taster Days, Enrolment, for example).

Navigate to **settings > application form** and you can enable the meeting phase.

Customise Application Journey

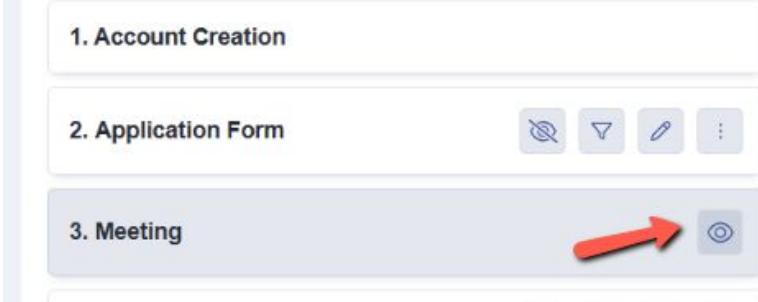
[All Phases](#) [Sort Phases](#)

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. Application Form

3. Meeting  



3. MEETING ^

ON

Visible to Student

Configuration

+ Create new meeting



Enable Meeting Phase

- When the Meeting phase is enabled, any student who has been added to one or more meetings must have their meeting marked as Completed before they can move on to the next stage in the process.
- If the Meeting phase is disabled, it will no longer appear on the student homepage and students will not be required to complete a meeting to progress.

All Meetings Specific meetings only

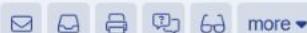
+ Create New Meeting

Save

Your view on the Student Profile would look like this if the meeting phase is enabled:

Porter Osinski #U-DP7E9

Phone 42177210673
School Swallows Nursery
Email



APPLICATION STATUS **Completed** 4/4

ENROLMENT STATUS **Pending**

MEETING STATUS **Incomplete**

OFFER STATUS **Offer Made**



Overview Application Form Enrolment Form Concessions and Bursary Activities **Meeting** Courses Selection Family

...

29

Hello Porter,



Porter Osinski Student Code: U-DP7E9

School: studentb046e52a6514c90d@admp.uk / 42177210673

Form Status

Completed

Offer status

Offer Made

Reference Status

Incomplete

GUIDANCE MEETINGS

Accepted

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

13/01/2026 09:40 - 10:00

Sixth Form Office

[Cancel Meeting](#) [Reschedule](#)

Currently unavailable to the applicant



Even if you make them an offer, or open up the next phase of your process, the applicant is unable to proceed because their meeting has not been marked “completed”.

Hello Porter,



Porter Osinski Student Code: U-DP7E9

School: studentb046e52a6514c90d@admp.uk / 42177210673

Form Status

Completed

Offer status

Offer Made

Reference Status

Incomplete

GUIDANCE MEETINGS

complete

Meet with the Sixth Form team to discuss your subject choices and career aspirations.

13/01/2026 09:40 - 10:00

Sixth Form Office

MEETING STATUS

Demo

Completed

APPLICATION OFFER

You received an offer on 28/10/2025. Please respond below:

[Decline Offer](#)

[Accept Offer](#)

Once you have marked the meeting as completed, the applicant is then able to move onto the next phase of your process.

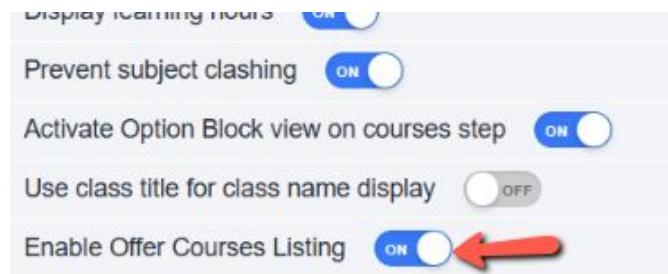


Adding courses to the offer list

As part of your process, you can make offers to your applicants.

If you enable the offer courses listing, this will allow you to make a subject-specific offer to applicants - you could either confirm the courses they applied for, or offer them something else if their choices are not appropriate.

Navigate to **settings > application form > courses** and activate this option:



Test Victor Test Swift #U-BU96T



Phone 30927608512

School

Email



APPLICATION STATUS

Demo

Completed

2/4

ENROLMENT STATUS

Pending

Overview Application Form Enrolment Form Concessions and Bursary Activities Meeting Courses Selection

Application Form Subjects

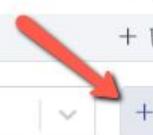
A Level PE (Block)	+
A Level Sociology (Block)	+
A Level Psychology (Block)	+

Enrolment Form Subjects

Add to offer list

A Level PE	+
A Level Sociology	+
A Level Drama	+

Select a Course



On a student's profile, click on their "courses selection" tab and you will see the subjects they applied for.

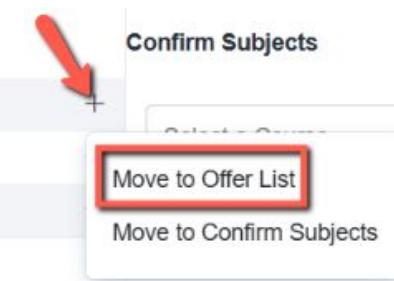
You can then add the courses you wish to offer the applicant in the offer list.

Note: you'll add them to "confirm subjects" at enrolment.

Application Form Subjects

A Level PE (Block)
A Level Sociology (Block)
A Level Psychology (Block)

Enrolment Form Subjects



Making offers to students

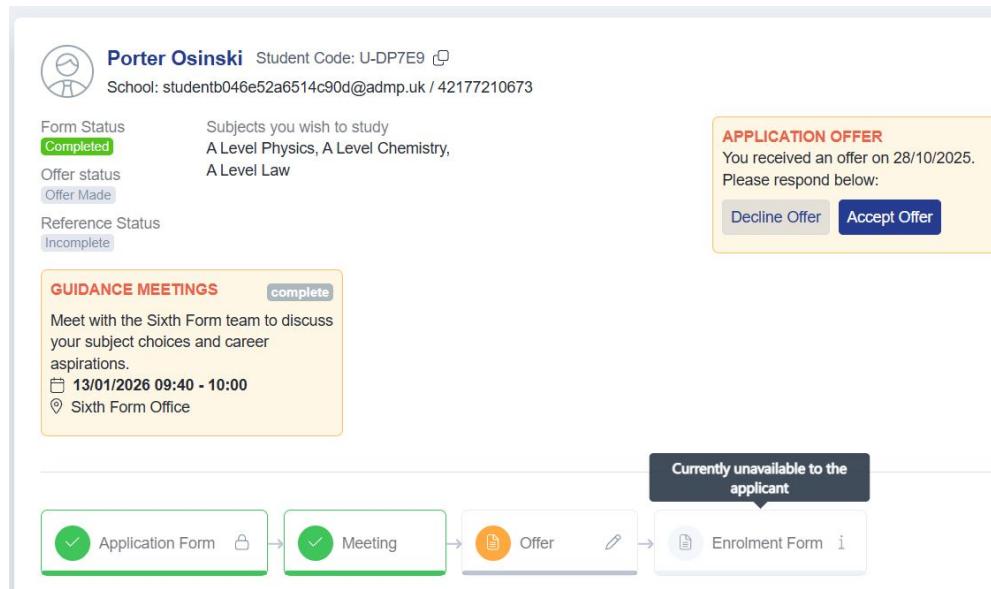
Navigate to **settings > application form** and make your offer phase visible to applicants.



4. OFFER 0 steps ^

Visible to Student Visible to Staff

The offer phase acts as a gate at enrolment; only students who have been made (and have accepted) an offer will be able to access and complete any further phases (Taster Day, Enrolment Form, etc.)



Porter Osinski Student Code: U-DP7E9 [Edit](#)
School: studentb046e52a6514c90d@admp.uk / 42177210673

Form Status: **Completed**
Offer status: **Offer Made**
Reference Status: **Incomplete**

Subjects you wish to study:
A Level Physics, A Level Chemistry, A Level Law

APPLICATION OFFER
You received an offer on 28/10/2025.
Please respond below:

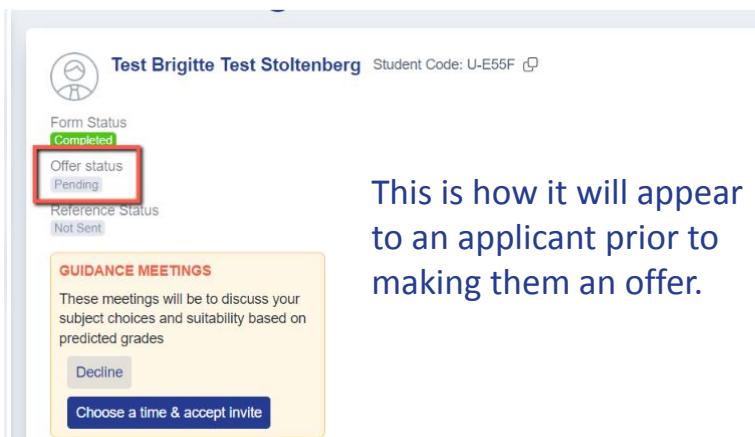
[Decline Offer](#) [Accept Offer](#)

GUIDANCE MEETINGS **complete**
Meet with the Sixth Form team to discuss your subject choices and career aspirations.
13/01/2026 09:40 - 10:00
Sixth Form Office

Currently unavailable to the applicant

Application Form → Meeting → Offer → Enrolment Form

Aside from the phase view settings, you can also check the offer status is visible to students on their homepage by navigating to **settings > form settings > student homepage** and activating this switch:



Test Brigitte Test Stoltenberg Student Code: U-E55F

Form Status: Completed

Offer status: Pending (highlighted with a red box)

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

This is how it will appear to an applicant prior to making them an offer.

Settings

Button text for continue application button

Continue Form

Show Student Code ON

Show Application Status ON

Show Offer Status ON (highlighted with a red arrow)



Test Brigitte Test Stoltenberg Student Code: U-E55F

Form Status: Completed

Offer status: Offer Made (highlighted with a red box)

Reference Status: Not Sent

APPLICATION OFFER
You received an offer on 14/11/2023.
Please respond below:

Decline Offer

Accept Offer

Check your offer email template by navigating to **communications and events > communications > automated messages** and locating this template:

	Triggered by	Phase	Triggered when	Repeat	Enable	Actions
	Staff	Email Subscription	Withdraw offer	N/A		
	Staff	Email Subscription	Make offer to student	N/A		

Mail Merge Field Subject Applied for 5 

Paragraph

Thank you for your application to [[SCHOOL_NAME]].

I am pleased to confirm that we can make you a conditional offer on the following courses you applied for:

[[GET_OFFER.Course_1]]
[[GET_OFFER.Course_2]]
[[GET_OFFER.Course_3]]
[[GET_OFFER.Course_4]]
[[GET_OFFER.Course_5]]

[[GET_Interested_Courses_1]]
[[GET_Interested_Courses_2]]
[[GET_Interested_Courses_3]]
[[GET_Interested_Courses_4]]
[[GET_Interested_Courses_5]]

use whichever fields are most appropriate for your process

[[LINK]]

Please use the following link to log onto your application to review and respond to your offer.

Amend your template to reflect your process.

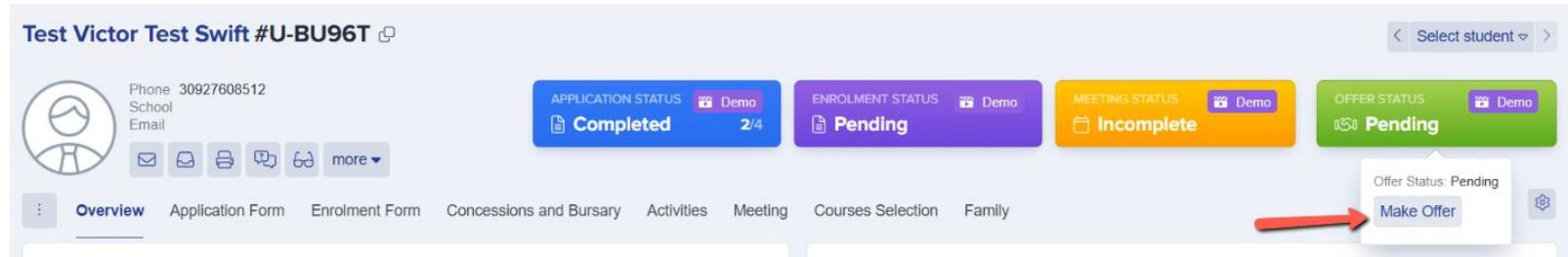
If you are using the offer list, use the “offered courses” merge fields.

If you don’t use the offer list, use the “applied for” merge fields. These fields are linked to the courses the student chose on their application form.

Alternatively you could opt not to use any courses mail merge fields and just make them a general offer of a place (without adding specified courses in).

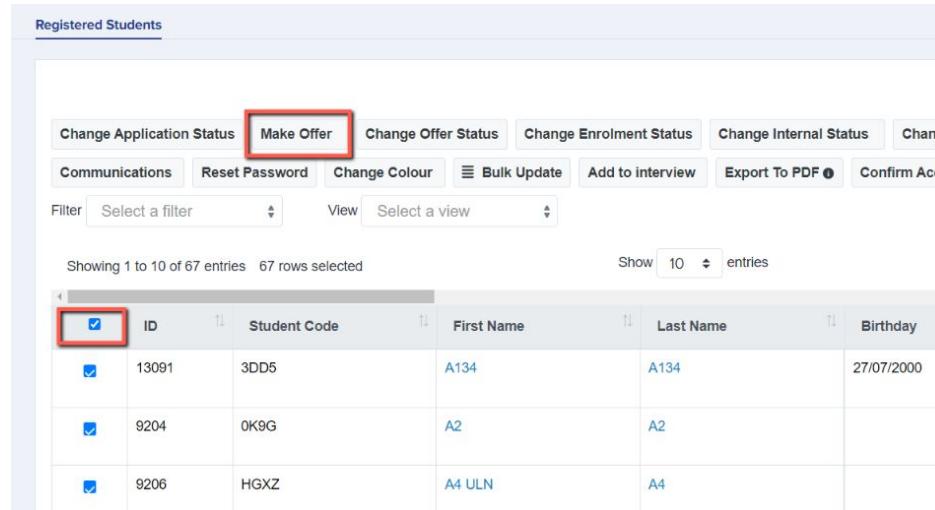
You can make offers **individually** or in **bulk**.

To send them **individually**, navigate to the student's profile and click the green "offer status" tile to bring up the "make offer" button (or you can complete this action as part of the meetings process).



The screenshot shows a student profile for "Test Victor Test Swift #U-BU96T". The profile includes a circular profile picture, contact information (Phone: 30927608512, School Email), and a "more" dropdown menu with icons for messaging, documents, and other actions. Below the profile are four colored status tiles: "APPLICATION STATUS" (Completed, 2/4), "ENROLMENT STATUS" (Pending), "MEETING STATUS" (Incomplete), and "OFFER STATUS" (Pending). A red arrow points to the "Make Offer" button, which is located in a tooltip above the "Offer Status: Pending" text. The main menu below the profile includes "Overview", "Application Form", "Enrolment Form", "Concessions and Bursary", "Activities", "Meeting", "Courses Selection", and "Family".

To send them in **bulk**, access a list of students from your main dashboard. Select them using the checkbox on the top left of the table and then click the "make offer" button.



The screenshot shows a list of "Registered Students" with a total of 67 entries. The table has columns for "ID", "Student Code", "First Name", "Last Name", and "Birthday". A red box highlights the "Make Offer" button in the toolbar above the table. Another red box highlights the first checkbox in the "Select a filter" column of the table, indicating that multiple rows are selected. The table shows the following data:

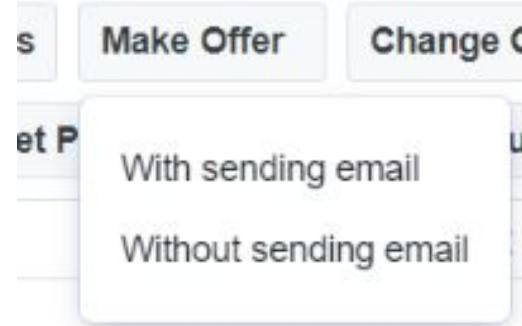
ID	Student Code	First Name	Last Name	Birthday
13091	3DD5	A134	A134	27/07/2000
9204	0K9G	A2	A2	
9206	HGXZ	A4 ULN	A4	

Making offers **with or without** sending email:

The “make offer” button is linked to the offer template in your automated emails area, so you can send the same offer letter to all applicants if that is your process - **but what if you need to send different offers to different groups or individuals?**

This is where the **“make offer: without sending email”** function comes in. It enables you to make the students an offer (ie put the “accept” and “decline” buttons on the student’s homepage), without sending them the master template.

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



Tracking responses to offers

From your main dashboard, you can track the status of your offers by navigating to the **Phase Status Details** table and clicking the “offers” tab.

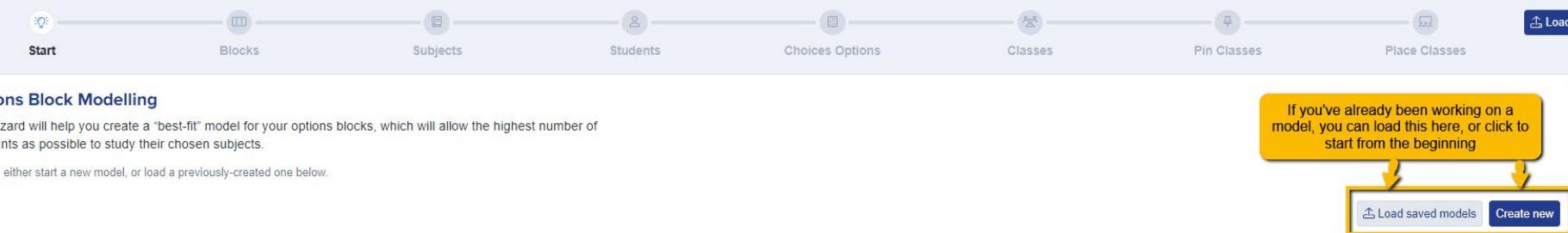
Phase status details			
	Application	Offers	Enrolments
Status		Internal	External
Pending (1571)	pending = students you have not yet made an offer to	227	1344
Offer Made (92)	offer made = students have been made an offer	4	88
Accepted (7)	accepted = students have logged in and accepted their offer	1	6
Declined (3)	declined = students have logged in and declined their offer	1	2
Offer Withdrawn (14)	offer withdrawn = you made this student an offer but have now made the decision to withdraw it from them	2	12

Creating Your Timetable

Our Options module enables you to build a best-fit model for your timetable, based on the combination of subjects chosen by your applicants.



The screenshot shows a software interface with a navigation bar at the top. The 'Overview' tab is currently selected. Other tabs include 'Reports', 'Recent Activities', 'Application Groups', 'Subjects Summary', 'Timetables', 'Options' (which is highlighted with a yellow arrow), 'Tasks', 'Calendar', 'All Activities', and 'Group Link'. Below the navigation bar is a section titled 'Tiles'. One tile is visible, showing '20 Registered Students' with a blue icon of a person in a square.



The screenshot shows the 'Options Block Modelling' wizard. At the top, there is a horizontal navigation bar with icons for 'Start', 'Blocks', 'Subjects', 'Students', 'Choices Options', 'Classes', 'Pin Classes', and 'Place Classes', followed by a 'Load' button. Below this is a section titled 'Options Block Modelling' with the following text: 'This wizard will help you create a "best-fit" model for your options blocks, which will allow the highest number of applicants as possible to study their chosen subjects.' It also says 'You can either start a new model, or load a previously-created one below.' To the right, a yellow callout box contains the text: 'If you've already been working on a model, you can load this here, or click to start from the beginning.' Two yellow arrows point from this callout box to the 'Load saved models' and 'Create new' buttons at the bottom of the wizard.

Tell the wizard the names of your blocks, for example A, B, C, D, E - add a new row for each block.

Start Blocks Subjects Students Choices Options Classes Pin Classes Place Classes Load

Blocks

To get us started, please tell us how many timetable blocks are used for your options subjects

Block order	Block's name in timetable
1	<input type="text"/>

Add the name of each block; for example: A

Click to add a new row for each block, then confirm and continue

[+ Add new row](#) [✓ Confirm and continue](#)

Blocks

To get us started, please tell us how many timetable blocks are used for your options subjects

Block order	Block's name in timetable
1	A
2	B
3	C
4	D
5	E

Next, the wizard will show the list of your courses - it will need to know the **shortcodes** for these courses (for example, Art may be Ar, Business might be Bu, etc.) and each course will need a unique code.

Apply the **thresholds** for your courses - the minimum and maximum numbers in order to safely and effectively run - you can set a different threshold for each course and you can apply these values in bulk by selecting multiple subjects, and choosing the **Edit class size** option.

Subjects

Tell us about the subjects you will be including in this model.

We have already loaded in your existing subjects. You can add new subjects and also choose which should be 'ignored' when timetabling later.

<input checked="" type="checkbox"/>	Subject	Short code (upto 4 letters) <small> ⓘ</small>	Warn me when class size exceeds	Warn me when class size is below	Number of blocks per class <small> ⓘ</small>
<input checked="" type="checkbox"/>	A Level Art and Design	Ale1	20	5	1
<input checked="" type="checkbox"/>	A Level Biology	Ale2	20	5	1
<input checked="" type="checkbox"/>	A Level Chemistry	Ale3	20	5	1

Start

Blocks

Subjects

Subjects

Tell us about the subjects you will be including in this model.

We have already loaded in your existing subjects. You can add new subjects and also choose which should be 'ignored' when timetabling later.

Subject	Short code (2 letters)
Art and Design	Ar
Biology	Bi
BTEC Applied Science (Triple)	Ap
BTEC Business (Double)	B2
BTEC Business (Triple)	B3

The formatting is automatic: when you add a code, it will automatically make this Capital:Lower Case (eg Ar for Art)

Edit class size (18 selected)

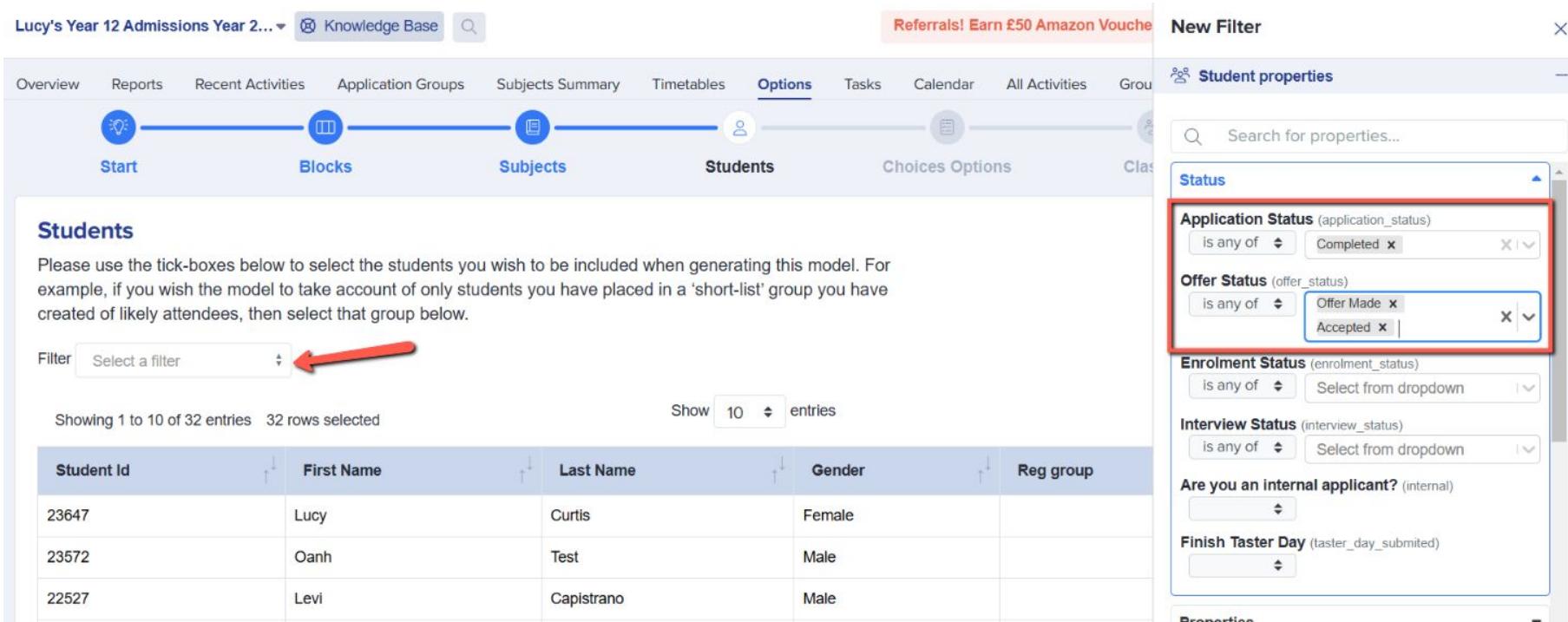
Set the **width** of your courses. This means how much weight the course has; is it a single A Level? If so, add the number 1. If the course is a double, add the number 2, or 3 for a triple.

Subject	Short code (2 letters)	Warn me when class size exceeds	Warn me when class size is below	Number of blocks per class
Art and Design	Ar	20	5	1
Biology	Bi	30	8	1
BTEC Applied Science (Triple)	Ap	25	6	3
BTEC Business (Double)	B2	28	10	2

Once your settings are in place, click “confirm and continue”. It will check for any errors before allowing you to move on, for example if you have not used a unique code for each subject or have failed to set class sizes.

Spanish	Sp
This code is not unique. Please choose another.	

Move onto the students step, to decide which filters you would like to apply: do you only want to build the timetable based on **completed applications**? Or maybe only on those you have made **offers** to? Leave everything blank if you want to see what would happen if all of your applicants enrolled or click “filter” to apply any settings required.



Lucy's Year 12 Admissions Year 2... Knowledge Base Referrals! Earn £50 Amazon Voucher

Overview Reports Recent Activities Application Groups Subjects Summary Timetables Options Tasks Calendar All Activities Groups

Start Blocks Subjects Students Choices Options Classes

Students

Please use the tick-boxes below to select the students you wish to be included when generating this model. For example, if you wish the model to take account of only students you have placed in a 'short-list' group you have created of likely attendees, then select that group below.

Filter Select a filter Show 10 entries

Showing 1 to 10 of 32 entries 32 rows selected

Student Id	First Name	Last Name	Gender	Reg group
23647	Lucy	Curtis	Female	
23572	Oanh	Test	Male	
22527	Levi	Capistrano	Male	

New Filter

Student properties

Search for properties...

Status

Application Status (application_status)
is any of Completed

Offer Status (offer_status)
is any of Offer Made Accepted

Enrolment Status (enrolment_status)
is any of Select from dropdown

Interview Status (interview_status)
is any of Select from dropdown

Are you an internal applicant? (internal)
is any of Select from dropdown

Finish Taster Day (taster_day_submitted)
is any of Select from dropdown

Properties

Once your filters are in place, “select all” students and click to “confirm and continue”.

On the “Choices Options” step, you can set which subject choices to build the model on.

Choices Options

Select students' options to build the model:

- Interested and Reserve subjects
- Interested subjects

Please select the number of ranked subjects to be included in the modelling

- Utilise all of the subjects selected by the applicant

- Only use their top choices. The rest will be treated as reserve choices.

Ignore ranked options

▲▼

- Include reserve choices in the modelling

- Offered subjects

Only works if you have used the "offer courses list" function to prepare a list of offered subjects.

- Allow Partial Allocation of Students' Classes 

On the “classes” screen, you will see the number of students per subject based on the filters you applied, and can specify how many **teaching groups** you would be able to offer (based on your current staffing).

This will then show you how many students would be in each class for that particular course/subject.

The average class size column will be colour-coded to highlight any classes which would be too big or too small, based on the settings you have added earlier on in the wizard.

Subject	Students wanted	Teaching groups	Average class size
Art and Design	52	1	52
Biology	323	3	108
BTEC Applied Science (Triple)	29	2	15
BTEC Business (Double)	33	2	17
BTEC Business (Triple)	18	1	18
German	1	1	1
Government and Politics	84		

If you want, we can reduce the 'projected number' of students for each class by a certain percentage which you can enter here.

For example, if you know that only 80% of your applicants end up attending in September, you can enter '80' in this box, and we will adjust the projected class sizes below accordingly.

When calculating class sizes, assume that 100 percent of internal applicants

and 100 percent of external applicants will attend in September.

Advanced: Per-subject conversion rates

Advanced: Per-subject conversion rates

Enable per-subject conversion rates

 Set custom rates in the table below. Empty fields use the global rate. The "Source" column shows which rate is being used.

Export a template to edit rates in Excel, then import back:

 Export Template

 Import Rates

You can also add a "projected number" calculation, which will apply a conversion rate to your numbers.

This can be set **globally** with the same conversion rate applying for all subjects, or you can set a **custom rate** to apply if there are certain subjects with differing projected rates.

Subject	Filtered students	Internal applicants	Int. conversion rate (%)	Projected internal applicants	External applicants	Ext. conversion rate (%)	Projected external students	Teaching groups <small>?</small>	Average class size	Source
A Level Art and Design	1	0	85	0	1	100	1	0		<small>Custom</small>
A Level Biology	4	2	100	2	2	100	2	1	4	<small>Global</small>
A Level Chemistry	4	1	100	1	3	90	3	1	4	<small>Custom</small>

Allocation Rules

Define constraints before the system allocates students to classes.

Block Exclusions 0 Block Dependencies 0

Prevent specific classes from being placed in certain blocks

+ Add Exclusion

Use exclusions when: A teacher or room is unavailable in specific blocks (e.g., teacher teaching Y13 in Block D means Y12 class must be excluded from D).

No block exclusion rules defined yet.
Click "Add Exclusion" to create your first rule.



Allocation Rules allow you to set constraints on blocking before proceeding to generate your model. For example, specifying that a subject must be excluded from a particular block, or that a specific subject combination is dependent on particular blocking.

← Back

Validation

0

Errors

0

Warnings

0

Info



No validation issues
All clear to proceed

Pre-Allocation Checklist

Teacher constraints reviewed
Single-teacher subjects checked

0/4

Room constraints reviewed
Specialist rooms checked

0/1

Subject dependencies verified
Linked subjects configured

0/1

Y13 conflicts checked
Existing timetable considered

0/1

Complete all checklist items before proceeding

Continue to Place Classes

Click to **Allocate students and classes** to generate your model.



Students who have been allocated to their main choices will show as **excited**.

The next face shows students who are **happy** - they got most of their choices, but one is a reserve subject (if you used reserves at application stage).

The **sad** face shows students who are allocated to something which they had not originally chosen (you've allocated them to a new subject).

The **devastated** face indicates students have not been able to be completely accommodated, based on the current model being projected.

17 0 1 5 All (23) Happiness score: 92.75% Freeze allocation + Add students

A	B	C	D	E
+ Add new class 1212A/Ale2 - A Level Biology 2	+ Add new class 1212B/Ale12 - A Level Product D... 2	+ Add new class 1212C/Ale4 - A Level Drama 5	+ Add new class 1212D/Ale81 - A Level Law 3	+ Add new class 1212E/Ale3 - A Level Chemistry 4
+ Add new class 1212A/Ale5 - A Level English La... 2	+ Add new class 1212B/Ale13 - A Level Psychology 4	+ Add new class 1212C/Ale10 - A Level PE 4	+ Add new class 1212D/Ale82 - A Level Law 2 1	+ Add new class 1212E/Ale4 - A Level Drama 4
+ Add new class 1212A/Bte1 - BTEC Health and S... 3	+ Add new class 1212B/Val - Values for Living 4	+ Add new class 1212C/Ale11 - A Level Physics 4	+ Add new class 1212D/Ale9 - A Level Mathematics 4	+ Add new class 1212E/Ale7 - A Level French 4

Click to the **devastated** face to view the students who haven't been able to be fully accommodated in your model, to see what else is available to them and you can allocate them using the “select classes” button.

Happiness report

 5 students have not been completely allocated

Show 25 entries

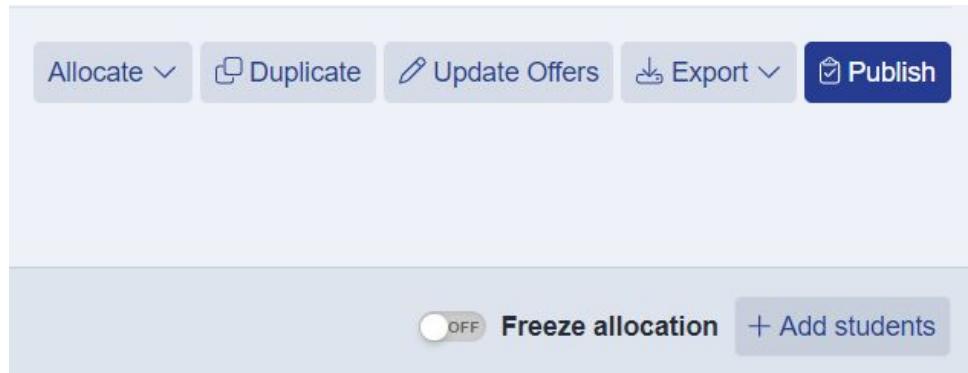
#	First Name	Last Name	Internal / External	Choices	Could have been allocated	Allocated
1	Meah	Meopham	External	Main choices <ul style="list-style-type: none">• A Level Drama ✓• A Level English Language ✓• A Level English Literature	<ul style="list-style-type: none">• A Level Drama• A Level English Language	<ul style="list-style-type: none">• A Level English Literature
2	Ophelia	Ryan	Internal	Main choices <ul style="list-style-type: none">• A Level Law ✓• BTEC Science ✓• A Level English Literature	<ul style="list-style-type: none">• A Level Law• BTEC Science	<ul style="list-style-type: none">• A Level English Literature

You can also filter these reports by internal and external applicants as needed.

Click **Allocate** to recalculate class allocations for the students - you can do this individually, just for those who are unfrozen, or for all.

Use the **Update Offers** function to update the Offer Courses Listing for every student who has been allocated within the model - saves you having to do this individually. Useful if you build your model prior to making offers.

Use **Duplicate** to make **copies** of the model, so you can play around in your clones, but keep the master copy undisturbed.



You can **Freeze** and **Unfreeze** your model; this allows you to lock/unlock classes and students in place.

Use the **Add Students** function to add students not already included in the model, so you can take them into consideration without having to go back to the Students step.

Run an **export** to download a CSV, Excel or PDF of blocks and classes information, or a Student Allocations Report (CSV) to see which classes each student would be allocated to, based on your model.

When you are satisfied with your model, click to **publish**. This will add the classes from your model to your **Timetable**, ready for Enrolment.

A  + Add new class

1212A/Ale4



8

1212A/Ale10



4

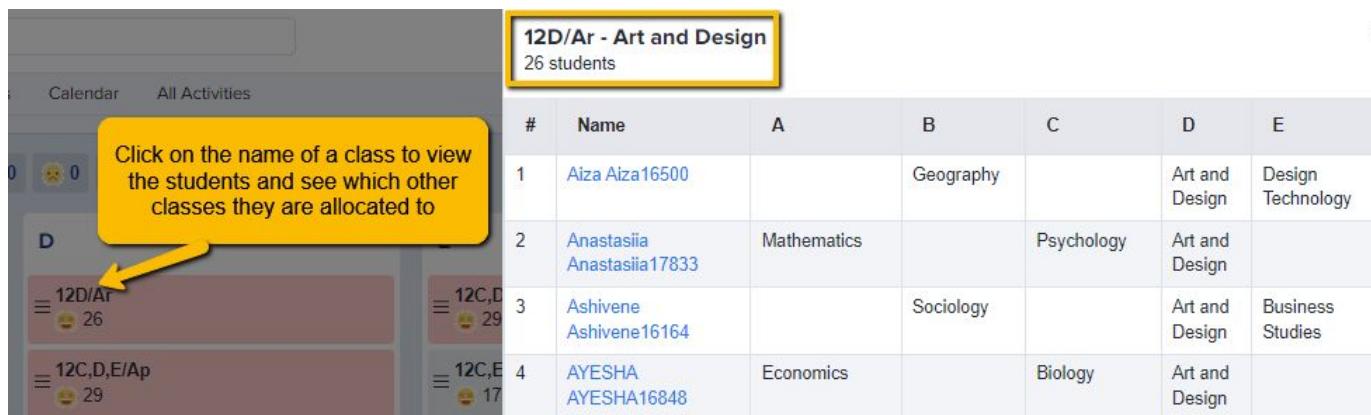
1212A/Ale11



4

On each block, you have the function to manually add extra classes.

You can also click on each class to view who is allocated to it, and which other subjects they are also allocated to.



Calendar All Activities

Click on the name of a class to view the students and see which other classes they are allocated to

#	Name	A	B	C	D	E
1	Aiza Alza16500		Geography		Art and Design	Design Technology
2	Anastasiia Anastasiia17833	Mathematics		Psychology	Art and Design	
3	Ashivene Ashivene16164		Sociology		Art and Design	Business Studies
4	AYESHA AYESHA16848	Economics		Biology	Art and Design	

You can **pin any classes you are happy with**, so their position is retained when making other changes. Hover over a class to **pin, duplicate or remove** a class, or use the **smart allocation** feature.

If you duplicate a class, it will create a copy of it underneath, and will automatically divide the number of students between the two groups.

C + Add new class

1212C/Ale6





Use the **Smart Allocation** feature to test a subject out in different blocks, and see what that does to the percentage of students allocated - this lets you test things out before you move them!

A Level Drama - 1212A/Ale4 ×

Smart class allocation

Click 'Test in other blocks' to see how moving the class to another blocks will affect student allocation

Block	Score	
A	98.55 %	Current block
B		Move it here
C		Move it here
D		Move it here
E		Move it here

[Close](#) [Test in other blocks](#)

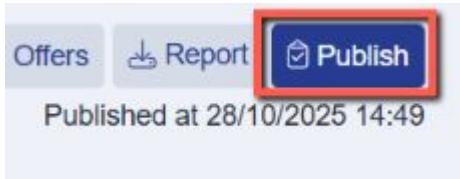
A Level Drama - 1212A/Ale4 ×

Smart class allocation

Click 'Test in other blocks' to see how moving the class to another blocks will affect student allocation

Block	Score	
A	98.55 %	Current block
B	91.3 %	Move it here
C	92.75 %	Move it here
D	95.65 %	Move it here
E	95.65 %	Move it here

Publish your model to update your **Timetable** (this is in readiness for Enrolment).



Overview Reports Recent Activities Application Groups Subjects Summary **Timetables** Demo Options Demo Tasks Calendar All Activities Group Link

Timetable Overview Forecasting Unallocated Applicants

Class Timetable

Filter Timetable: Type here to select Subject Filter: Filter for subjects

Showing 1 to 10 of 18 entries Show 10 entries

<input type="checkbox"/>	Course	Available on Application Form <small>1</small>	Available on Enrolment Form <small>1</small>	Interested	Enrolled	Waiting List	Offered	Block A	Block B	Block C	Block D	Block E
<input type="checkbox"/>	A Level Art and Design	<input type="checkbox"/> ON	<input type="checkbox"/> ON	1	0	0	0					1212D/Ale1 (0 max) 0 interested 0 enrolled
<input type="checkbox"/>	A Level Biology	<input type="checkbox"/> ON	<input type="checkbox"/> ON	3	0	0	0					1212D/Ale2 (0 max) 0 interested 0 enrolled

Create the classes in your MIS!

Useful Information

Support Telephone Number: 020 3667 0764

Access all Meetings and Offers guides

Access Timetabling and Options guides



Do you have any questions?