



OVERVIEW

You can design your form to capture Supplementary Information, make offers to parents and then collect full data for those who are offered a place.

Our default template is designed to run as follows:

- Parents self-register (September to October)
- Parents complete their verification and log in to complete your SIF
- You review the submissions, commence the ranking process and submit these to the LA (November to January)
- You receive your offer list and import it, then use the Offers function to make offers to parents (March)
- Parents who have been made an offer log in, respond to the offer and complete your full admission form
- You transfer the completed data to your MIS

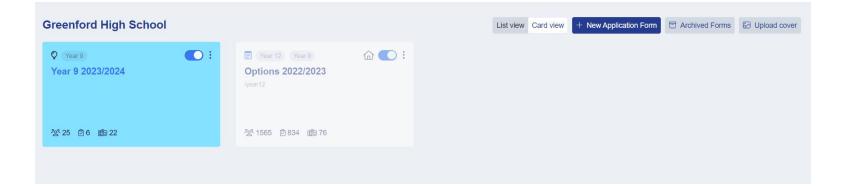
How to see your new form

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



In year Application 2023/2024 TIN Admissions Year 2022/2023 Year 7 Data Collection Admissions Form 2021/2022 Admissions Year 2021/2022, 2023/2024 Year 12 Admissions Admissions Year 2021/2022, 2022/2023

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.

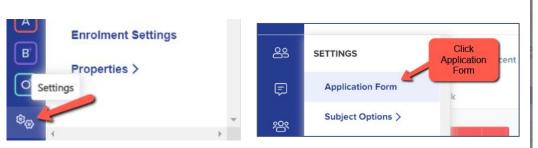


How to close your old form

Now that the previous cycle has finished, you don't want parents completing anything more on that form.

Click on the name of your 2025 form in your forms area to access the dashboard.

Navigate to **settings > application form > global form settings** and turn on "prevent parents from adding new applications".



Global Form Settin	gs	\times			
Submit Application Text	Save & Submit Application				
Maximum postcode chara	cters including spaces	8 🛊			
What type of user can app) Students	Parents Parents & Stud	lents	1	® Glo	bal Form Setting
Prevent parents from add	ding new applications ()	•			
Turn off registration butto	n on landing page. 🕚				
Show description under o	question (1)				
Application signed up by	Parent 🕕				
Disable sending emails to	o Students, only send emails to Parents				
Disable CC Parent in Em	ails 🕕				
Send notification when s	ending email 📵				
Enable address suggesti	on to use Ward for Town/City		le this phase	Download Blank Form	Sort Step
Prevent imported users (to login before a welcome	e.g. parents or students) from being able e email is sent		e uns phase	Download Blank Form	
to togin outplu indiculti			External		Visible on Student Profile

Customise Application Journey Easy View (Preview) Advanced Step View Phase View

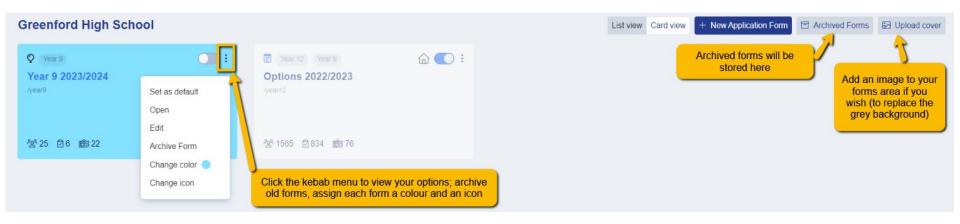
Within phase view, click the pencil icon for your application form; turn on "disable submissions".

This will ensure no existing forms can be edited and no new applications can be started on your old form - that data is now all managed within your MIS.

You could also turn all phases off if you wish, using the toggle switches.

Customise Application Journe	y Step View Phase View			钧 Global Form Settings	+ New Phase + Create Test Application
All Application Phases					⊃¢ Sort Phases
Phase	Category	Visible to Applicants	Visible to staff on Applicant Profile	Filter 🚯	Action
2. Application Form 6	Form Questions			Filter Summary: Updated Students	click the edit button
		Disable submi	ssions	Click to turn on	
		Stand alone	0		

You can also archive old application forms in your forms area if you wish to keep your main forms area tidy



Editing your Landing Page

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

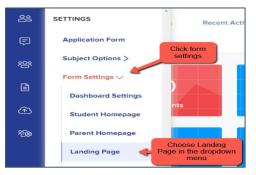
Click the "edit" button to make changes.

Here you can edit your initial message to parents by clicking "customise texts and buttons".

You can also add a pop-up notification - perhaps to tell them when the new cycle will open or give them information about forthcoming events?

You can also update any images here as needed, under "general settings".







On your landing page, you should also ensure the form is set to allow parents to register, so they can create their own accounts and log in to complete your SIF!

Form Se	ttings Student Homepage	Parent Homepage	Landing Page	Application Groups
Config	guration Mode			
Choos	e your landing page o	configuration mode:		
O Only	/ students can register	9		
⊖ Stud	dents & Parents can regi	ster 🚯		
⊖ Stud	dents and parents must t	be imported by staff 🕚		
Only	/ parents can register 🚯)		
O New	Application area hidder	completely		

Editing your Parent Homepage

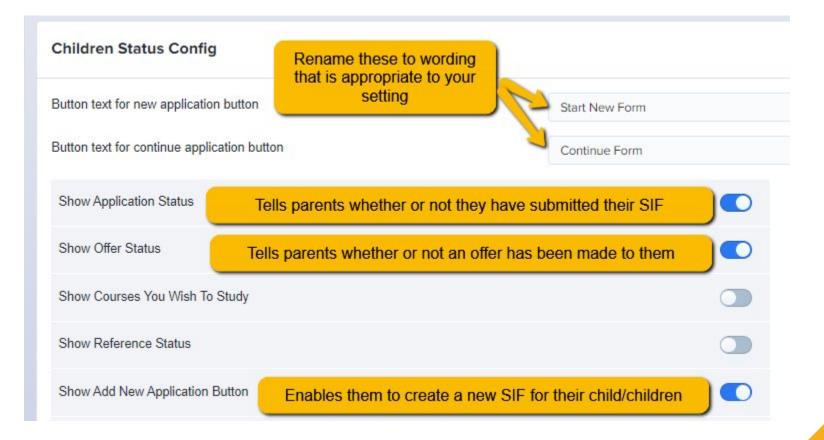
Form Set	tings									
Dashboard	Student Homepage	Parent Homepage	Landing Page	Application Groups	Form Groups	Student Profile				

(settings > form settings > parent homepage)

On the Parent Homepage you can add a general message, and a welcome message specific to the intake you are currently working on.

General Welcome Message	Preview Preview
Messages on parent's homepage Parent Homepage Image Welcome to our application process. Making the right choice of secondary school for your child is an extremely important decision. If you recognise in us a place where your child could thrive and grow, then I would encourage you to apply. If there is any further help or information you need then please do not hesitate to contact us.	
↓ Show more	
Year 7 With Supplementary Information Form (2023/2024) Welcome Message Seen only by parents who are logging into your Year 7 form	Preview
Messages on parent's homepage Parent Homepage Image	
Please complete all steps of your child's application.	
Just a reminder that you must also name us as one of your choices on your Common Application Form and submit this to your local authority by 31 October.	
↓ Show more	

You should also ensure your settings are as follows, at the bottom of the page:

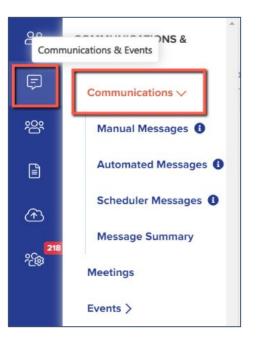


What parents will see:

命	Hello Eloyed61b595936cbda8 Stantoned61b	595936cbda8,	
HOME		+ Start New Form	School Message
MESSAGES	Constant Test Rice Student Code: U-EAB6 D Edith Cadbury Nursery School	¢ 🖯 🛛	Welcome to our application process. Making the right choice of secondary school for your child is an extremely important decision. If you recognise in us a place where your child could thrive and grow, then I would encourage you
Ë	School Message Please complete all steps of your child's application.	× <u>Show full message</u>	to apply. If there is any further help or information you need then please do not hesitate to contact us.
CALENDAR	Form Status Completed Offer status Offer Made	APPLICATION OFFER You received an offer on 19/05/2023. Please respond below: Decline Offer Accept Offer	Show full message Upcoming Events
	Supplementary Information Form Admissions Year 2023/2024 Supplementary Information Form Admissions Form Admissions Form Admissions Form Admissions Form I		2 JUL Event Taster Day

Checking your email templates

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



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

red when 👫	Repeat	**. I	Enable	14	Actions	24
\$			You can edit, move to folder and delete using these icons		000	
					0 🗈 🖻	
to interview	N/A		0		1 🗈 👁 🗓	
to interview	N/A		0			

Priorities for checking ahead of launch:

Communications				
Manual Messages	Automated Messages	Sc	heduled Messages	Messag
		Q Search	in table	
All Automated Mes	sages	Showing 1	to 39 of 39 entries	
Application Form		4		
Email Subscription		Type ^{↑↓}	Template Name	Subject
Enrolment			Search Template I	Search
Meetings			Year 7 with SIF	
Reference			Notify Teacher	You hav

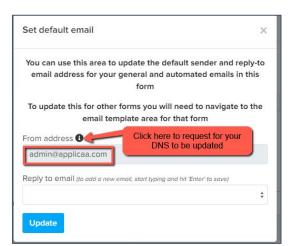
Type †	Template Name	Subject **	1
	Search Template I	Search Subject	
	Admission Form Submitted	Admission Form received for {{STUDENT_FIRST_N AME]} {{STUDENT_LAST_N AME]}	i
	Parent Welcome	Welcome to our school	
	Make offer to student	Your Offer	é
	Parent Confirmation Instructions	Welcome to our Online Application Form	
	Notify Parent SIF Complete	Supplementary Information Form received for {{STUDENT_FIRST_N AME}} {{STUDENT_LAST_N AME}}	ä
	New Password	Your New Password	

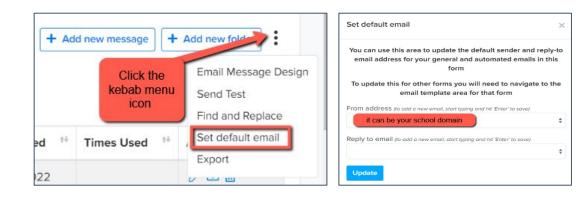
Manual Messages:

Create any manual templates now so they are set and ready to use later on in the cycle - future you will be grateful!

ළු	Communications								
Ę	Manual Messages Autom	nated Messages	Scheduled Messages	Messag	ges Summary				
瓷						+ A	dd new message +	Add new folder	1:
	All Manual Messages	Q Search in table	5		Show 50 ¢ entries				
Æ	Emails	Showing 1 to 50 o	of 56 entries		Show 50 ¢ entries				
	Notifications	†† Type ††	Template Name	†4 S	Subject	Last Updated	Times Used 🙌	Actions	14
218 行命	SMS		Archive			17/03/2022		100	
	Eavoritos		test folder 01			01/10/2021		100	

Check who the emails are being sent from and who the replies will come to - set your defaults here:





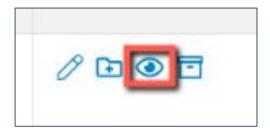
If you are seeing "admin@applicaa.com" in the From address, this means you have not requested a DNS update. You can request this by clicking this icon and adding the details for your IT Manager - it will then mean you can send emails from your own school domain!

Insert mail merge fields and add attachments as required to personalise your messages.

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Hi ;[[STUDENT_FIR	{ST_NAME}},													
Congratulations.														
Thank you for com	pleting your a	oplication for 6	th form.											
We would like to in	nvite you to en	roll on {[DATE}]	a -											
On this day you mu	ust be here in	person and yo	u will be asked	to select your s	ubjects. You wi	ll only be ab	le to enroll o	n courses	whe <mark>re y</mark> ou	have me	et the er	ntry requir	rements.	
You will need to o	n that day:													
1. Check your pers	onal details.													
2. Select your subj	ects													
3. Meet with our se	enior member	of staff on your	r enrolment wil	start on {{TIME}	and it will take	e place in {{R	OOM]} If you	have any	questions	please co	ntact M	Brown.		
This can be done t	by phone on 5	555 5555 55 <u>6</u>	ext: 555 or you	can email on ad	min@demosch	iool.com								
This can be done t	by phone on 5	555 5555 55 <u></u>	ext: 555 or you	can email on ad	min@demosch	iool.com								

Preview Communication

You can also preview the email template if you want to see the layout



Dear {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}},

I am pleased to learn from the Local Education Authority that your child has been allocated a place at [[SCHOOL_NAME]] from September.

The next step now is for you to complete our online data collection form. This provides the school with all the information required ahead of your child joining the school.

Please use the log in details and link below:

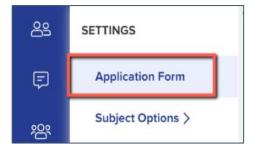
Below is your login details for [[SCHOOL_NAME]] Email: {[CONTACT_EMAIL]} Password: {[CONTACT_PASSWORD]} Website: {[LINK]}

We look forward to hearing from you. Kind regards

Your application phases and settings

Navigate to **settings > application form > phase view** and turn on all three phases (visible to applicants).







You should also check the names of your phases to ensure they are appropriate to your intake. If you are using our default form, these will already be customised for you, or you can customise them yourself by clicking the pencil icons:

Customise Application Journey	Step View Phase View				钧 Global Form Settings + Crea	te Test Application
All Application Phases					24 Sort Phases	+ New Phase
Phases	Category	Visible to Applicants	Visible to staff on Applicant Profile (1)	Filter 6		Actions
2. Application Form	Form Questions					
3. Offer	Offer					$\nabla \mathcal{P}$
4. Enrolment Form	Enrolment					$\nabla \mathscr{O}$
Edit Step: Application Form Name Admission Form Description Internal Applicants Lock form after submission • Disable submission • Trigger by condition		• Offer (same)	orm > Supplementa rm > Admissions Fc		ion Form	

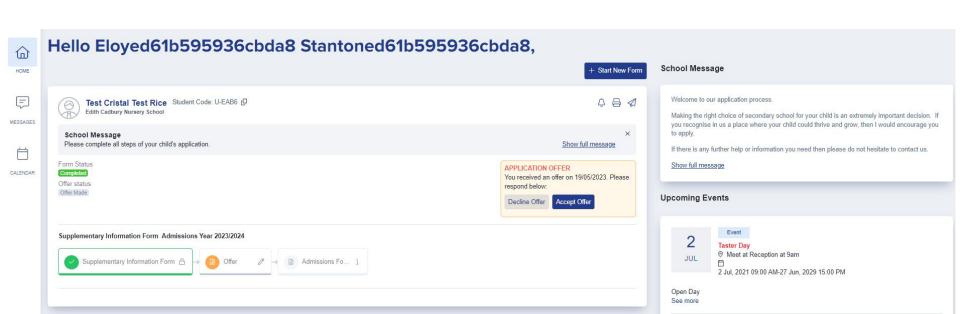
ve

Customise Application Journey Step View Phase View

All Application Phases

Phases	Category	Visible to Applicants 6	Visible to staff on Applicant Profile	Filter 0
2. Supplementary Information Form	Form Questions			
3. Offer	Offer			
4. Admissions Form	Enrolment			

What parents will see:



Application Form Area

Settings > Application Form

Our default template is already customised based on recommended best practice, but of course you can customise each phase to suit your own needs.

The default setup is:

- Parents complete Parent Registration step this creates their account
- Parents log in and complete your SIF phase completing Child's Basic Details, Parent/Carer and Admissions Criteria only
- You review the forms and complete and submit your rankings
- You receive the offer list in March and can import this into Admissions+
- Work through your offer list and make offers to the correct parents, using the "make offer" template
- Parents who receive an offer log in, respond to the offer and then complete all of the steps on your Admissions Form
- Once data has been collected, you transfer that data to your MIS

Year 7 with Supplementary Inform * 🛞 Knowledge Base		Refer a scho	ool & get £50 Amazon Voucher! 🚀 🛛 👔	9 B 🧸 (
			段 Global Form Settings + 0	Create Test Application
Phase: Account Creation				I
Step Name				Actions
Step 1: Enquiry 🖸				P @
Step 2: Student Registration				10
Step 3: Parent Registration				1 ®
Phase: Supplementary Information Form			⊃\$ Sort Steps	+ New Step
Step Name	Internal	External	Visible on Student Profile ()	Actions
Step 1: Child's Basic Details	CAlways on, canno	t be disabled		0 1
Step 2: Parent/Carer Please list parent or carers in order of priority, starting with the contact that should be contacted first in the event of an emergency				10
Step 3: Religion				0 @
Step 4: Courses				00
Step 5: Payment				<i>0</i> ®
Step 6: Admissions Criteria Please tick the admissions category which applies to your child:				1 @ D
Phase: Offer			≫t Sort Steps	+ New Step
Step Name	Internal	External	Visible on Student Profile ()	Actions

Phase: Admissions Form 2 Last synced with Application Form: 25/05/2022 03:12PM			⊃⊄ Sort Steps	+ New Step
Step Name	Internal	External	Visible on Student Profile ()	Actions
Step 1: Child's Basic Details				1 🕸
Step 2: Parent/Carer Please list parent or carers in order of priority, starting with the contact that should be contacted first in the event of an emergency				10
Step 3: Child's Welfare and Support Information				<i>0</i> ©
Step 4: Parental Agreement and Consent				P 🕸
Step 5: Child's Education				1 🕸
Step 6: Additional Information				1 @
Step 7: Religion				<i>0</i> ©
Step 8: Courses				<i>0</i> ©
Step 9: Admissions Criteria Please tick the admissions category which applies to your son:				P 🕸 🛍

Any data completed in your SIF phase will auto-populate into your Admissions Form phase, so parents can see the answers previously given and make any amendments as necessary. Within step view, 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.

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 Sims User Defined Fields **Pre-defined Question & Fields** Custom Question student date sims udf 45 Date Picker **MIS Compatible** Non-MIS Compatible Test UDF sims udf 4018 **Dropdown Sinale** SIMS Select Explanation Text Block Add paragraphs to the form so you can explain more details to applicants.

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

Add your UDFs in your MIS, then:

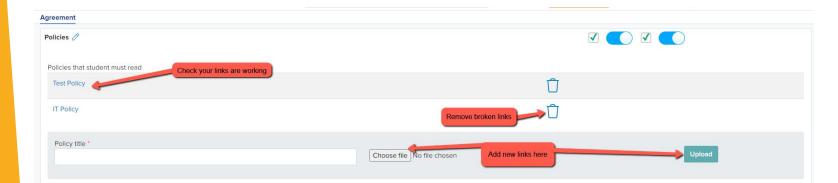
For SIMS, log into the A+ SIMS App - it will scan for updates and ask you to carry the updates over into A+.

For cloud-based MIS, go to settings > school settings > integration and click to Import UDFs.

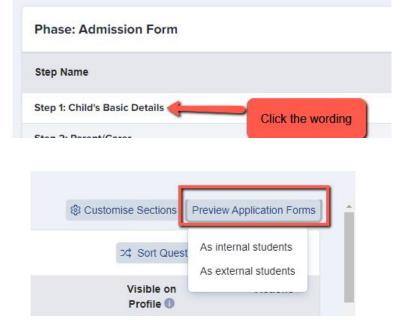
General Settings Staff Management Role Management Integration MIS Settings	General Settings Staff Management Role Management Integration MIS S
Bromcom credentials are valid.	MIS Setting
Authorized READ permissions: Students YearGroups StudentContacts People Emails PersonAddresses Classes PreAdmission	mb Setury
SurgeryDoctors UserDefinedFields UserDefinedFieldInstanceOptions CollectionAssociates YearGroupSubjec calConditions PreAdmissionStudents Languages StudentSchoolTransportinformation SENStudentNeeds SEI	Integration Platform
Please make sure you also granted WRITE permissions: Third Party Write Back - Pre-Admission Students	Arbor
Third Party Write Back - Student Groups Third Party Write Back - User Defined Fields Data	Import new MIS lookups as visible
The instructions can be found in this document: View Document	Enable saving to MIS School Names typed by applicants
Download Lookup Values Verify Bromcom Credentials/Permissions Again	
	MIS Credentials Validation
Bromcom User Defined Fields	Arbor credentials are valid.
Import UDFs	Download Lookup Values Import UDFs



Check the links to any policies in your **Parental Agreement and Consent** step - sometimes it is necessary to remove old policies and add new ones to ensure the links are accurate



Preview the whole form and check if it is all working as expected!



Preview the application form as **external** students (students who are not currently on your school roll) to see the whole form from the perspective of a parent

! Step 1 Child's Basic Details	! Step 2 Parent/Carer	! (Step 3) Child's Welfare and Support Inf	ormation	! Step 4 Parental Agreement and Consent	l Step 5 Child's Education
Child's Basic Details Please upload a recent pa Choose file No file chos Child's Forename*	assport-style photog		Child's Prefe	rred Forename	
Test External FN Child's Surname*			Child's Prefe	rred Surname	
Test External LN Child's Middle Name			Child's Gend	er*	
Child's Date of Birth"			Female Year group a	polied for*	x \$
12/12/2004			rear group a	ppiece ior	\$
Child's Current Home	e Address				
Postcode* Type here to search your	postcode		Flat name an	d or number	

There is the option to configure your **address settings** so they migrate correctly into your MIS as per your school's setup.

Address Block Co	onfiguration ()			Apply to Existing Addresses Report
Address 1	line 1>	Set to the format that works		Preview
Address 2	line 2>	best for you by selecting the options shown and then click		
Address 3	<line 3=""></line>	"test"	Address 1	2 Westfield Road
Town/City	<post_town></post_town>	÷	Address 2	Wigginton
		O ALL CAPS 🜒 🛞 Normal Case	Address 3	
County/State	<postalcounty></postalcounty>	٥	Town/City	York
Country	<country></country>	;	County/State	North Yorkshire
Postcode	<postcode></postcode>	\$	Country	United Kingdom
Enter a postcode	to test:		Postcode	YO32 2JF
2 Westfield Roa	d, Wigginton, YORK,	YO32 Test		

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

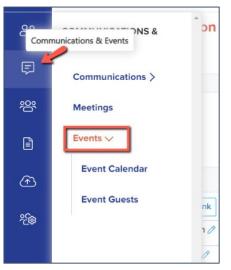
Here is a link to our guide

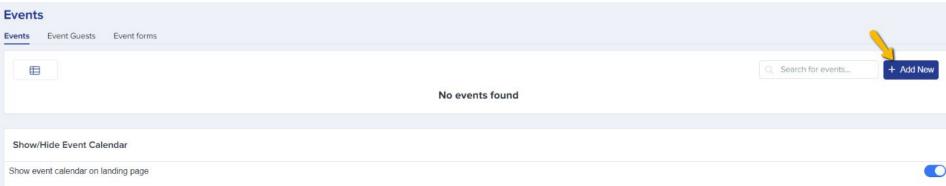
You will see the option to configure your address format, test how it appears and apply it to all addresses already in your system to ensure they are formatted correctly ahead of your import!

Setting up open evenings and events

You may want to set these up in one of two ways: for attendees to register for a place, or just to show on a calendar for applicants to be aware of the event taking place

Navigate to **communications and events > events > event calendar.**





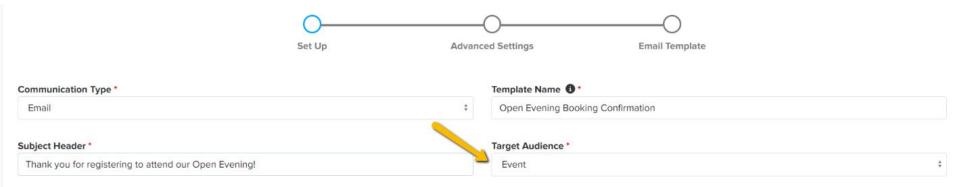
Click to create a new event and set your parameters:

Event details	
Event name *	
Year 7 Information Evening Event type	
Open Evening	× ;
Start date *	End date
16/09/2024	16/09/2024
Start time *	End time *
17 ~ 00 ~	21 ~ 00 ~
Description *	
Paragraph \checkmark B \cup <i>I</i> \equiv \equiv \equiv \equiv \Leftrightarrow \mathcal{O} \land	∷ ¦= 🖬 ∨ 🛍 🖽 ∨ — ← ↔ ↔ ᢗŧ ∨ 🗈 ∨ ŷ Source ⊘
Information evening for prospective students and parents/guardians.	

Specify settings - where would you like to display the information about this event? Are there limited places?

If you would like to email registrants to confirm their booking you can do so - this is covered on the next slides.

To link an email to your event, navigate to your email templates area and go to "manual messages". Create a new message and ensure the recipient is "Event".



Then, go back into your events area and you will be able to link the email template to your event.

Should users be	able to register themselves?		
۲	0		
Yes	No		
Enable Event Fo	rm		
Enable Event	Form in Parent Homepage		
Automated Emai	1		
Send automa	ted email to event registrants		
Email template			
Event Test			÷
		Delete	Update Event

Chasing Incompletes

You can chase **incomplete** forms by sending reminders to parents - either manually, or by scheduling an email to go to them every few days.

Change Phase Status

-

Show 10

entries

Birthday

05/07/2010

05/07/2010

Click on the word "incomplete" to view the list of students in this status.

Select them all and click "communications" > "send email".

Change Offer Status

First Name

Deesha

Deesha

Deesha

Add to interview

Change Application Status

ID \checkmark

20

21

22

1

 \checkmark

Change Colour

Make Offer

Student Code

NU7M

JQNX

852X

......

Bulk Update

Showing 1 to 7 of 7 entries 7 rows selected

This will enable you to send an email the parents of the selected students.

Export To PDF
Confirm Account

Change Enrolment Status Change Internal Status

Last Name

Assani

Assani

Assani

-

- BB	Tiles				
¢	Tiles				
25		≡ 23			23
		SAMPLE		Registere	ed Students
Æ	Suppl	lementary Inf	ormation Form	Statuses	
ింతి	20 Incomplet		o Awaiting Reference	3 Completed	0 Declined
بِ <mark>38</mark>	0 Withdraw		0 Deadline Missed	O Waiting List	Docinida
	25				
s Add te	20	amove from group	Communications	Reset Passw	
s Add te	20	emove from group		Reset Passw	
s Add t	20	emove from group	Communications F Send Email Send SMS	Reset Passw	
s Add t	20	emove from group	Send Email Send SMS Send Reference Reque	ests	
	20	emove from group	Send Email Send SMS Send Reference Reque Send Custom Email to	ests	
der	20 o group Re		Send Email Send SMS Send Reference Reque Send Custom Email to Send Notification	ests Referee	
der	20 o group Re	Email/Username	Send Email Send SMS Send Reference Require Send Custom Email to Send Notification	ests Referee e Email	
der ale	20 o group Re	Email/Username	Send Email Send SMS Send Reference Reque Send Custom Email to Send Notification Send Student Welcome Send Parent Welcome	ests Referee e Email	

To schedule an email to go to them every few days, navigate to **communications and events > communications >** manual messages and click + New Message:

Create New Template	٩	Discard & Exit
Set Up	Advanced Settings Email Template	
Communication Type *	Template Name 🕘 *	
Email	* ¢ Incomplete	
Subject Header *	Target Audience *	
Please complete admission form	Parent	× \$
Sender Email 🟮 *	Reply-To Email (to add a new email, start typing and hit 'Enter' to save) *	
admin@applicaa.com	admin@applicaa.com X	× ÷
Template Description		
		Next +
up how would like to send this email here		
en applicant does what? *	When applicant does what? *	
Automatically when an applicant does something	×	
ielect phase applied to *		
Application Form This may say "admission form" depending on your settings from earlier	× \$	
iend after 5 day(s) 0 hour(s) 0 minute(s)		
Repeat email after every 5 day(s) until they submit		
* Back		

Set your parameters and move through the wizard to create the email you would like to send.

The system will then send it for you to anyone who fulfils the criteria.

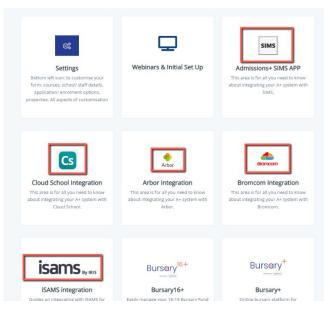
× ÷

IMPORTING DATA TO YOUR MIS

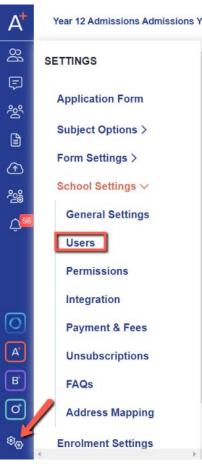
The process of importing your completed data into your MIS varies, depending which MIS you use.

Check the relevant guide on our <u>Knowledge Base</u> to follow the steps specific to your MIS.

If you have any difficulties please call us on 020 3667 0764



Update Staff Users



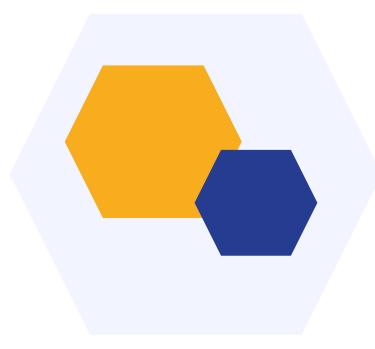
Check your list of staff users, particularly if you have had a change in personnel over the summer.

Ensure any staff who no longer work there are removed, and that new colleagues are added.

Set your Key Contacts - anyone set as a Key Contact will receive information from us such as important system updates, invitations to events etc (we send these by email).

Users		Ø Permission	>\$ Reset pase	sword	Send Welcome Email	Disable	Enable 🗍 Delet	e 은 Import u	sers + Add	User Manually
Q Search in table			Show 50 \$	entries 1	I to 45 of 45 entries		J		Prev	1 Next
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	Test: A1	oanh+1staffa@applica	a.com	Admissio	ns Manager / Director	View All	×÷		Deactivated	Not sent
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Do you have any questions?



THANK YOU