Data+ Guide

OVERVIEW

Schools who use SIMS and have a Multiform subscription with Applicaa can use their Admissions+ system to complete annual data checking exercises with the parents/carers of on-roll students

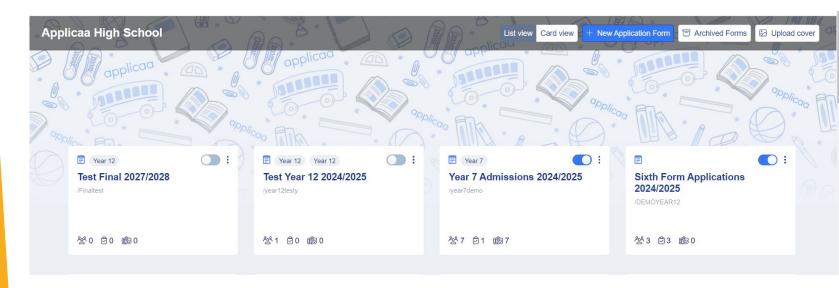
How to create your new form

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



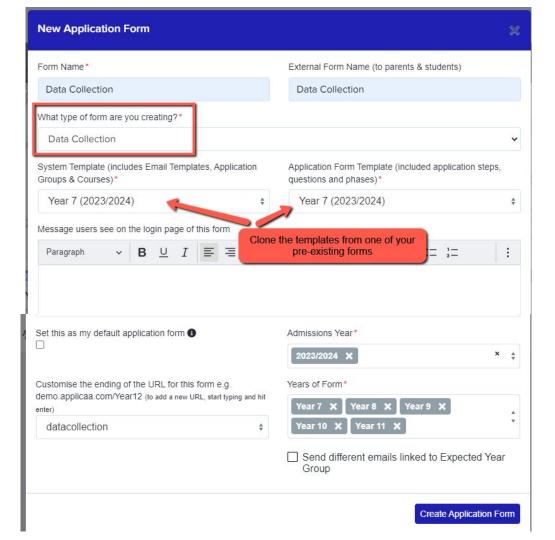


Your tiles area will appear and will look something like this:



Click "new application form" and set it up with the right information for your data collection





Set your new form up with the correct configuration for your data collection - clone one of your existing forms.

Turn the toggle switch on to make it active - it needs to be active to enable importing/exporting with SIMS



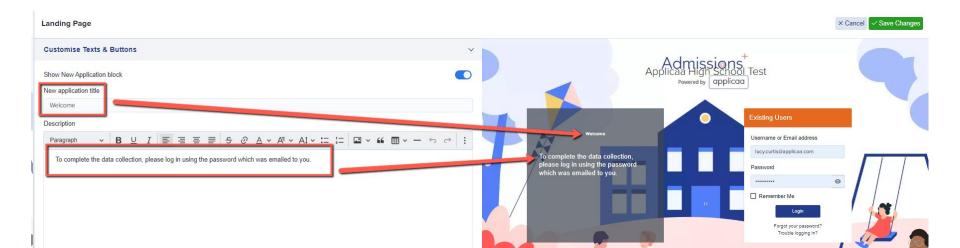
Editing your landing page and other messages

Navigate to settings > form settings > landing page

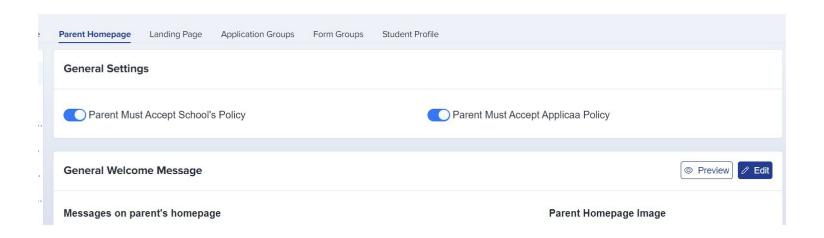
Here you can edit your initial message to parents and check your configuration mode. For data collection, this should be set to "students and parents must be imported by staff".

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

Choose your landing page configuration mode: Only students can register Students & Parents can register Students and parents must be imported by staff Only parents can register New Application area hidden completely

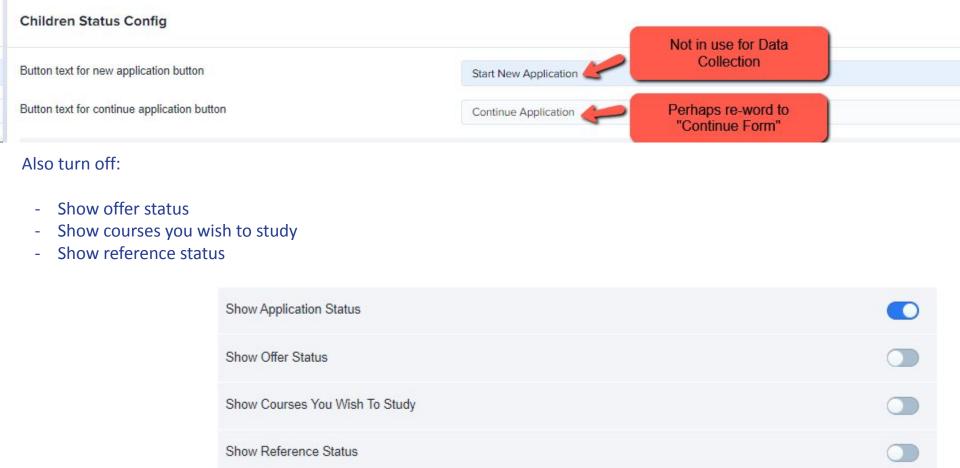


Navigate to "parent homepage" to edit those messages, update your settings and change any images as needed - this is what parents will see once they have logged in.



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.

You could consider changing your configuration to suit your intake:

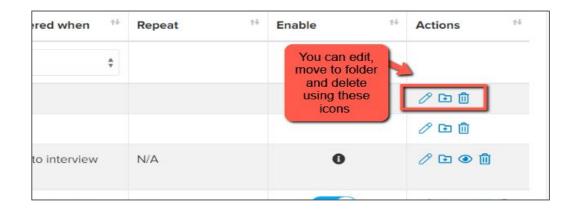


Checking your email templates

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

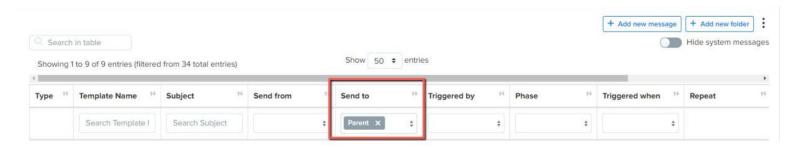


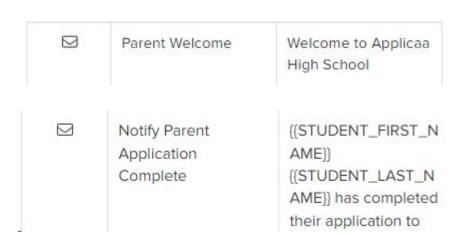
There are 2 automated emails you will need to check - you can preview and edit them by scrolling right on the table



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

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





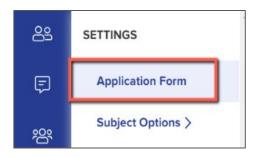
"Parent Welcome" will be the email you send to them to provide their password and invite them to log in and complete the form

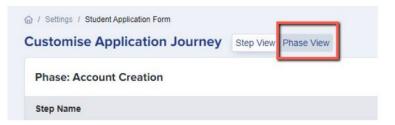
"Notify Parent Application Complete" can be activated to confirm parents have successfully submitted their form. Change the wording to acknowledge completion of Data Collection process instead!

Your application phases and settings

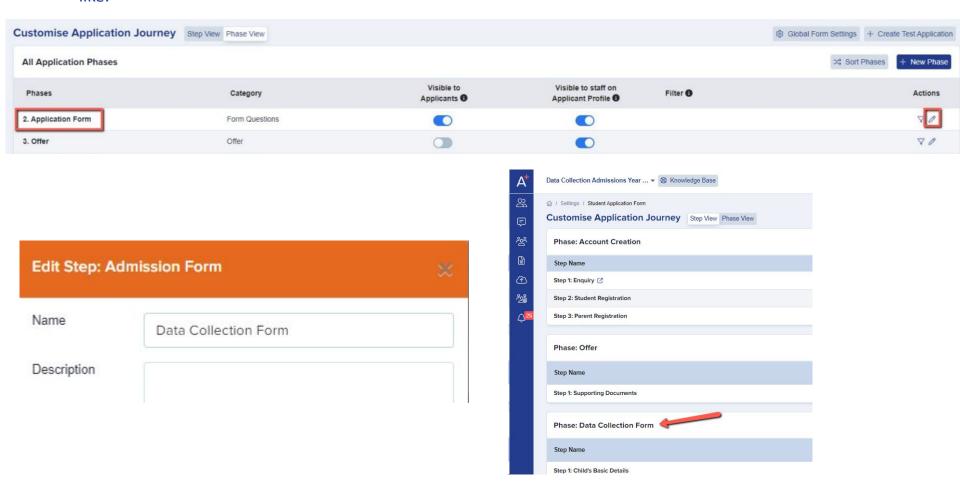
Navigate to settings > application form > phase view and turn off any phases not in use (offers)





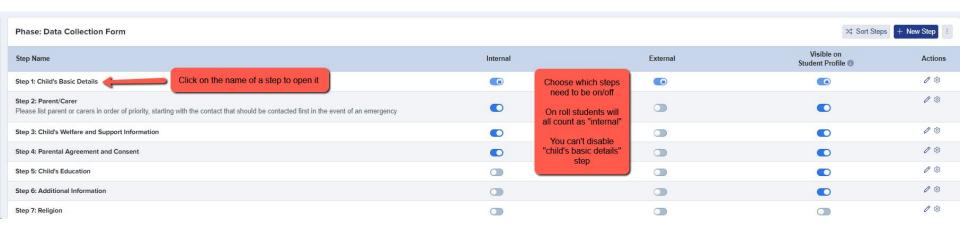


You can also rename the Application Form phase to something more appropriate for your intake, if you like:



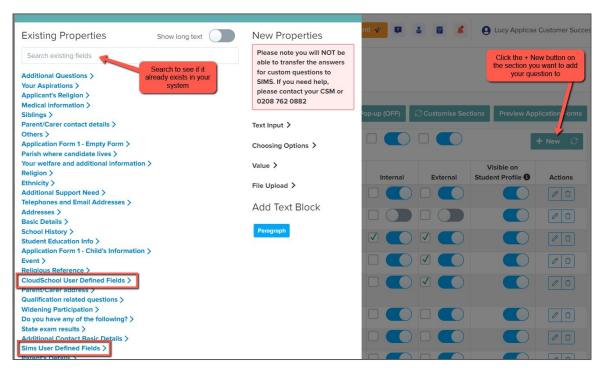
Configuring the Form - Step View

The application form is broken down into steps; click on the name of a step to view the questions/fields within it, by navigating to Settings > Application Form.



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

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!



Here is a link to our <u>form customisation guide</u>

Fields which have the SIMS logo mean the data is transferrable into and out of SIMS.

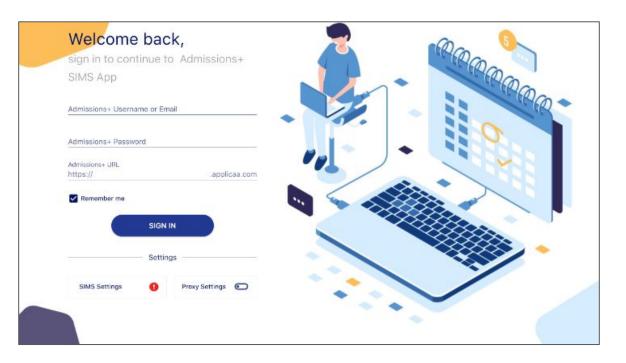
User-Defined Fields will also write back to SIMS, so you can add any UDFs into your form, as shown on the previous page.

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

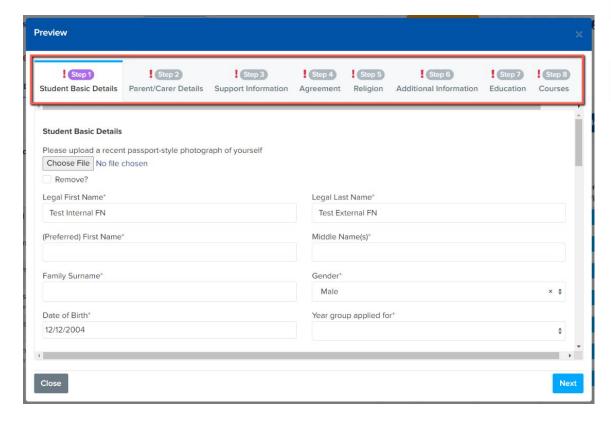
Not seeing your **User Defined Fields**? This will mean you need to make an update in your MIS first and then re-integrate!

Add your UDFs in your MIS, then:

Log into the A+ SIMS App - it will scan for updates and ask you to carry the updates over into A+



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





Exporting data from SIMS to A+

Important housekeeping:

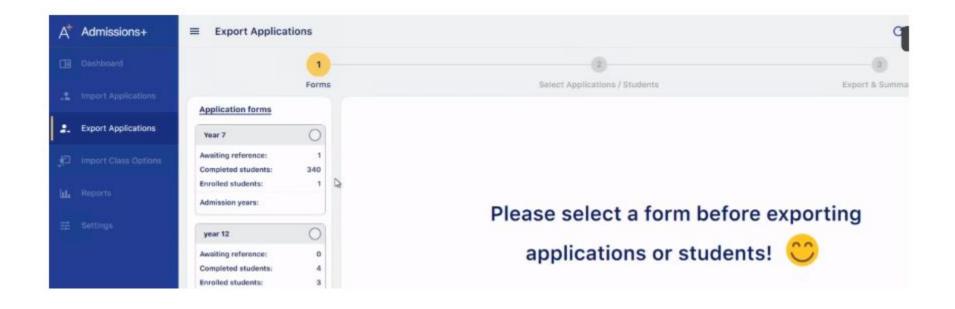
If any students already exist on another form within your Admissions+ system, please raise a ticket to request a bulk deletion of those students so your system is clean before transferring the students over from SIMS.

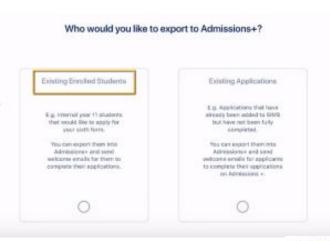
Example:

If you used your system for Year 7 admissions last cycle and you now want parents to complete their Year 8 Data Collection, please ask us to bulk delete them from last year's Year 7 cycle first.

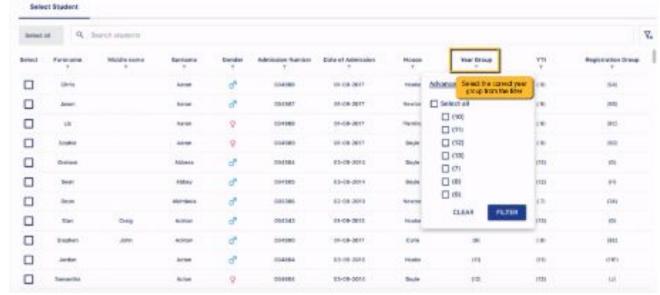
Data is moved into and out of SIMS via the Admissions+ SIMS App.

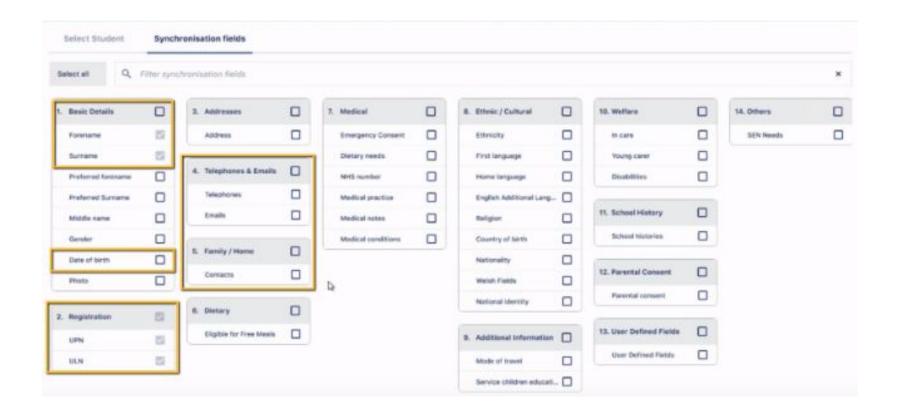
In the SIMS App, choose "export applications" and select which form you wish to export them to (eg Data Collection)





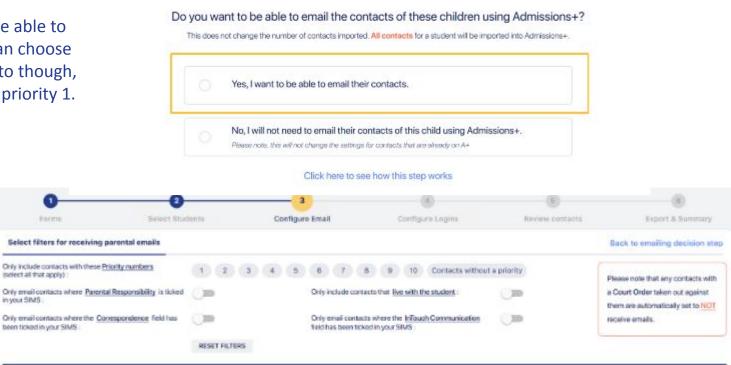
Select "existing enrolled students" and then filter for the year group(s) you would like to export.



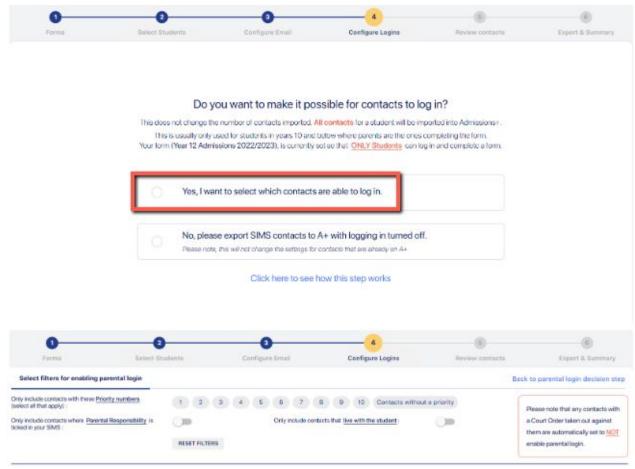


Choose which data you would like to export from SIMS, to be used in your data collection exercise.

You will definitely want to be able to email their contacts - you can choose which contacts this applies to though, for example just those with priority 1.



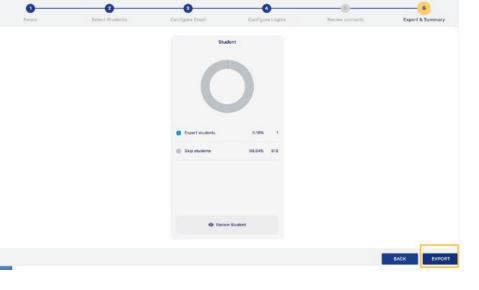
Above, please select the filter for setting which contacts can receive parental emails through Admissions+



You are also able to control which contacts will have the ability to log in.

At least one contact needs to be able to log in, so they can complete the form - again, you could restrict this to Priority 1 only, for example.

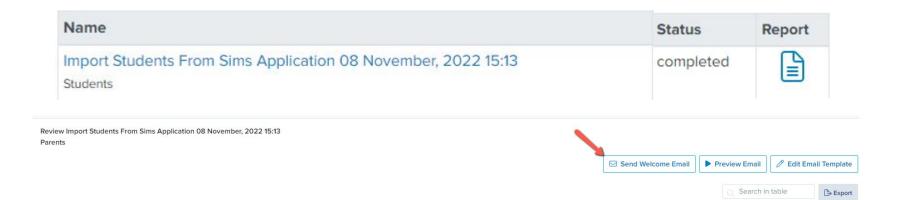
Above, please select the criteria for setting which contacts should have parental login enabled



You will see a summary of your export, and it will then commence.

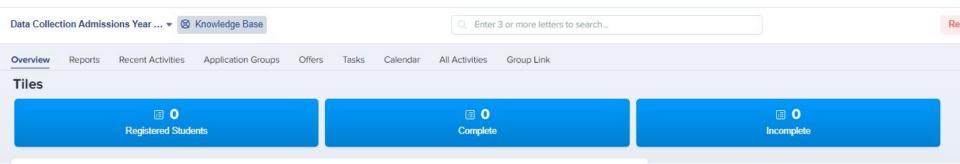
Once exported, the students and their data will exist in your A+ system and you can send the welcome email to the parents by navigating to Data > Import.

Click the import report, where you will see the names of the parents, and the button to "send welcome email".



Managing Your Submissions

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



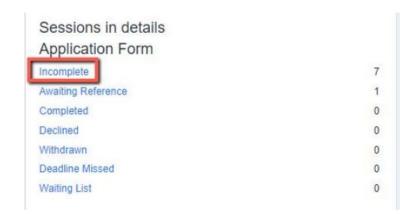
Chasing Incompletes

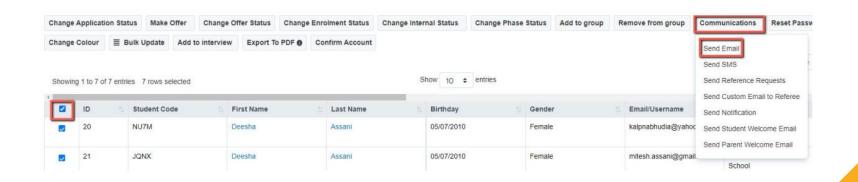
You can chase incomplete forms by sending reminders to the parents - either manually, or by scheduling an automated chaser.

Click the "incomplete" status on your main dashboard.

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

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

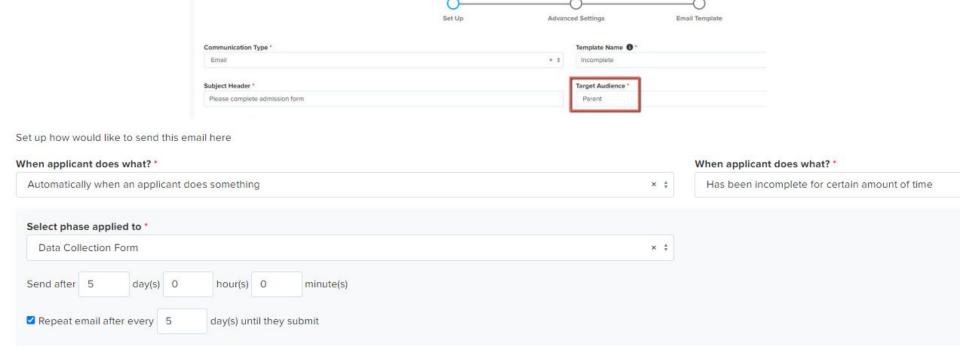




To schedule an auto-chaser, navigate to communications and events > communications > manual messages and click + New Message

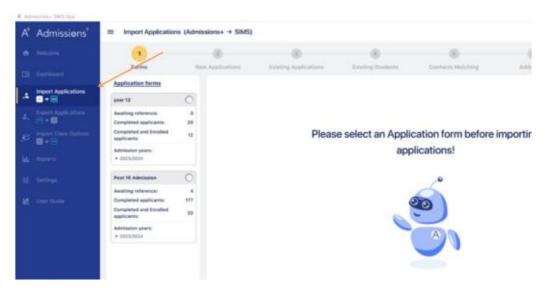
Set your initial configuration and move through the wizard to send the message "when an applicant does something" > "has been incomplete for a certain amount of time".

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

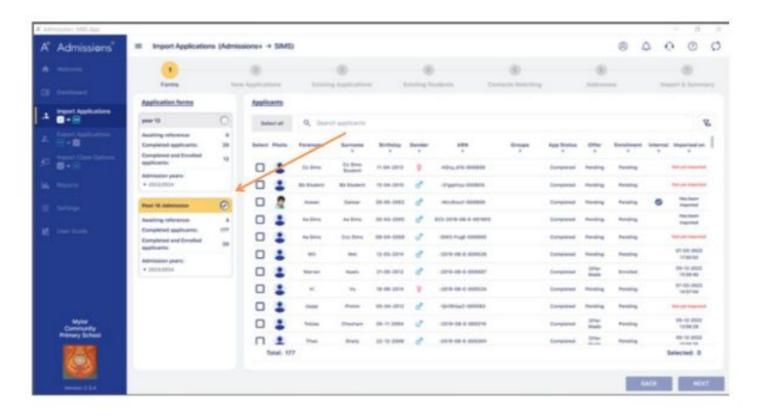


Importing data to SIMS from A+

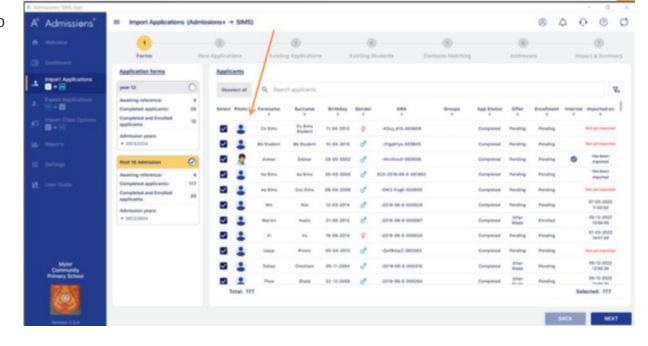
Click the icon to Import Applications from A+ to SIMS

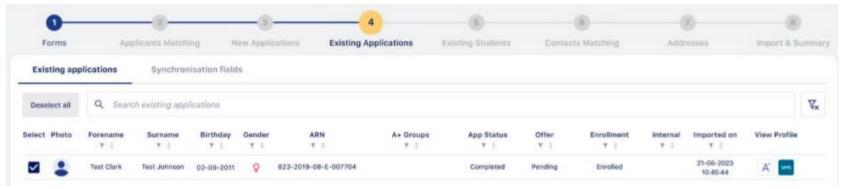


Choose the form which you would like to import the data from (eg Data Collection)

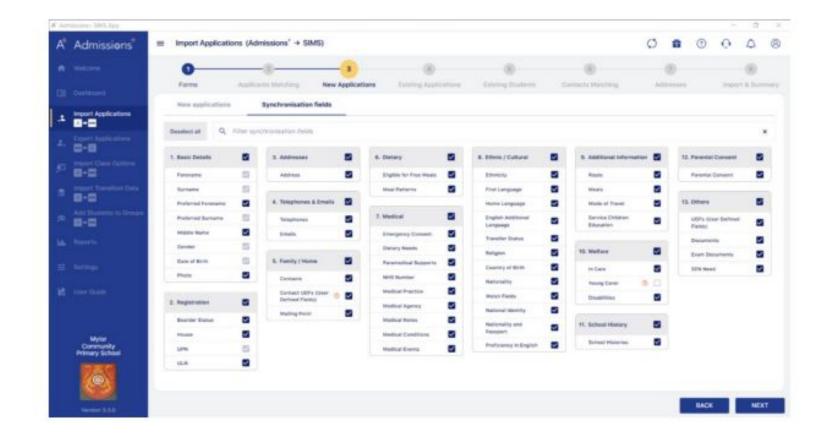


Select the students you are wishing to import, and they will be detected as "existing" within SIMS





Choose which data you would like to import for the students. There is a "select all function".

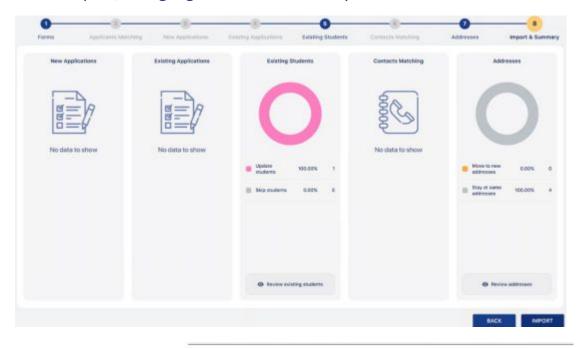






The "contacts matching" step checks for any data added by the parent, which matches an existing contact in SIMS (duplicate prevention feature).

The "addresses" step detects any changes to the address currently held in SIMS, vs the address being imported - you then decide which address to keep. You will see a summary and the import will commence. On completion you will see a report, to highlight successes and any errors.



Once you have completed your data collection exercise, contact us to request a bulk deletion of the data from your A+ system, so your system is clean again ahead of the next round!

IMPORT APPLICATIONS REPORT

○ fype to search				
	NO. 0	FULL NAME &	MESSAGE \$	TIPE # -
	10	Tube Islant	Import student data SUCCESS with 4 successes.	Success