Setting up your new cycle

Exams+

THE TIMELINE

1. You create a new form for the next Exams+ season and configure the questions which need to be answered by parents - you do this by cloning last year's form.

2. You publish the link to your new season's form so parents can register, create an account and apply for their child to sit the test (Summer Term).

3. Children sit the test (September) and the results are processed.

4. You receive the results and these can then be uploaded into the Test Results phase of your Exams+ form.

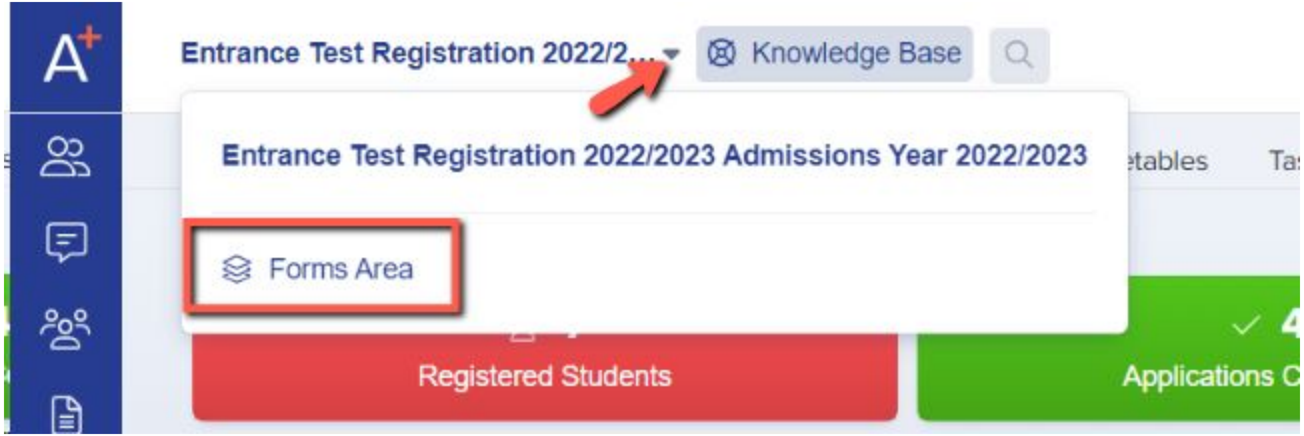
5. The results can be shared with the parents in two ways; either by email (using mail merge tokens) or by turning on the "Test Results" phase and inviting parents to log in and view the results.

6. Based on the results, parents can then make a decision about whether to apply for a Grammar School place for their child, via the Local Authority.

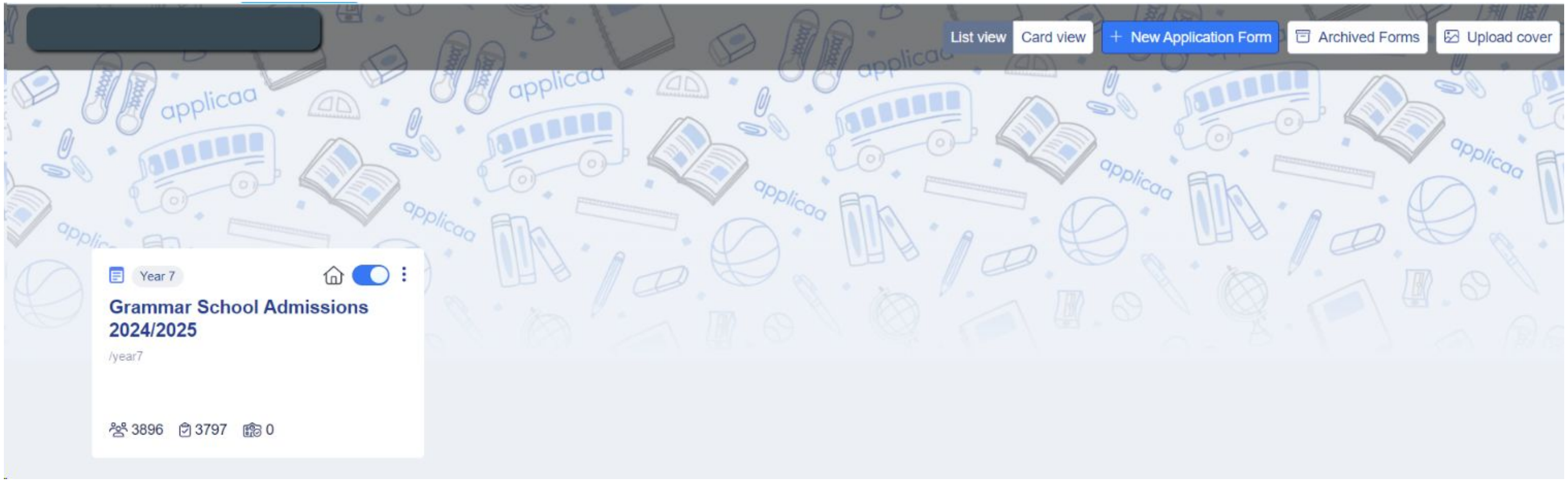
7. Schools receive their Local Authority lists and can then ask parents to complete their admissions/data collection forms via their Admissions+ system (March).

How to create your new form

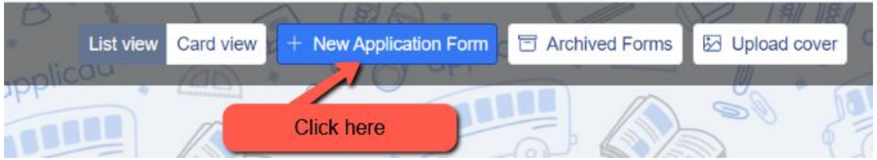
Click on the blue wording in the upper left of your dashboard and then click “forms area”

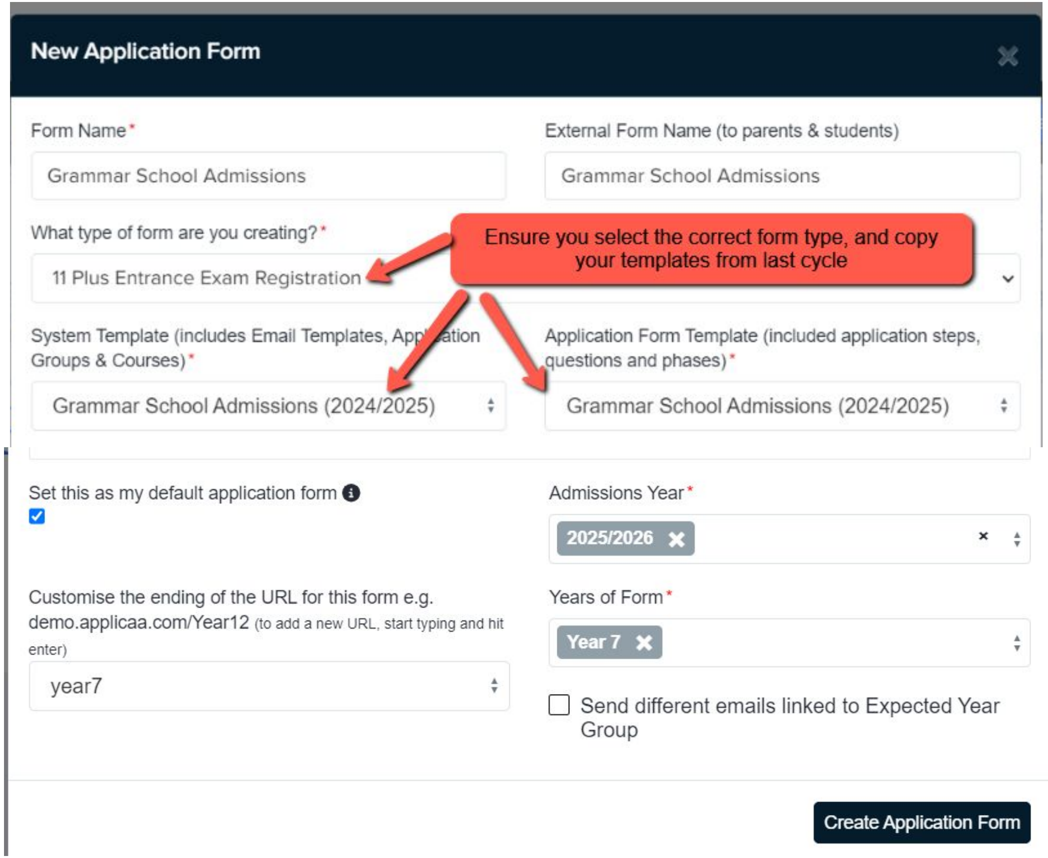


Your tiles area will appear and will look something like this:



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





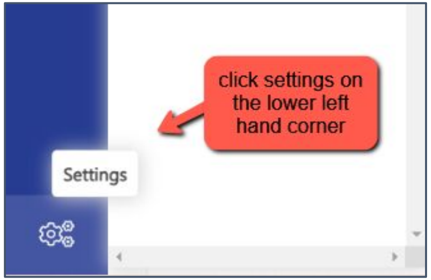
Set your new form up with the correct configuration for your intake - clone last year’s form to carry over all settings, email templates and questions!

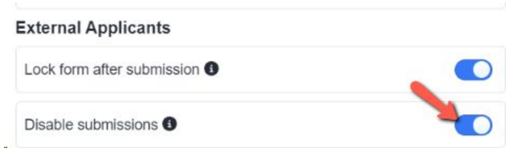
Turn the toggle switch on to make it active

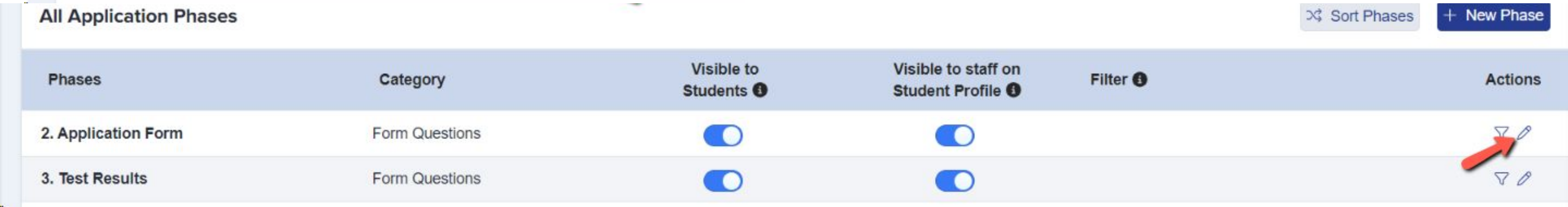
How to close your old form

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

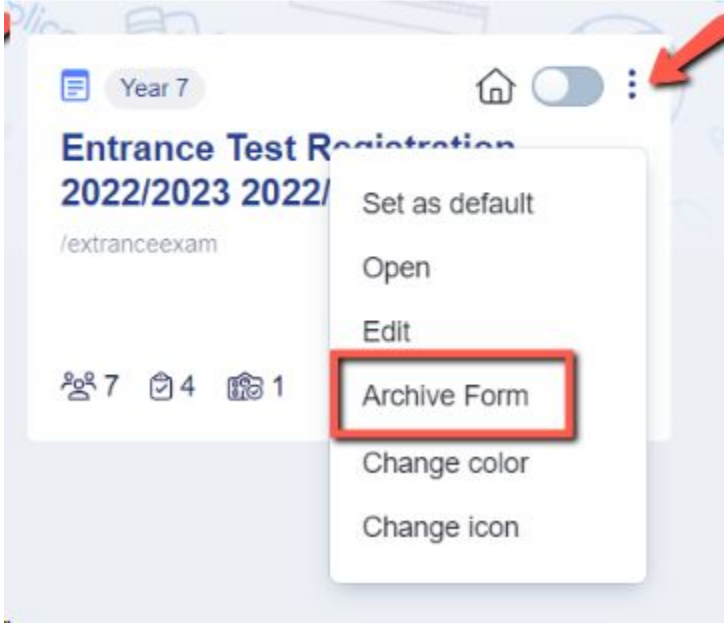
In your old form:
Navigate to settings > application form > phase view and click the pencil icon to turn on "disable submissions" for every phase

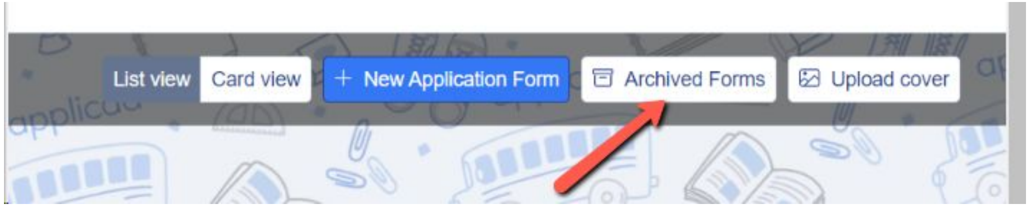






You can also archive old forms in your forms area if you wish to keep your main forms area tidy



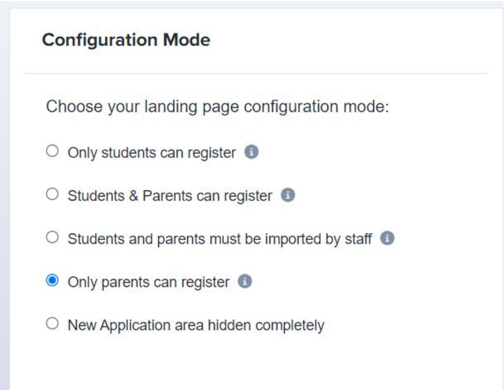


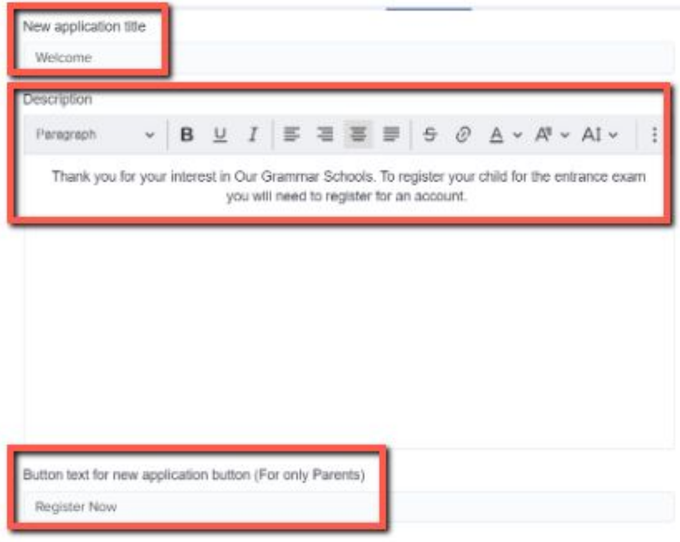
Editing your landing page and other messages

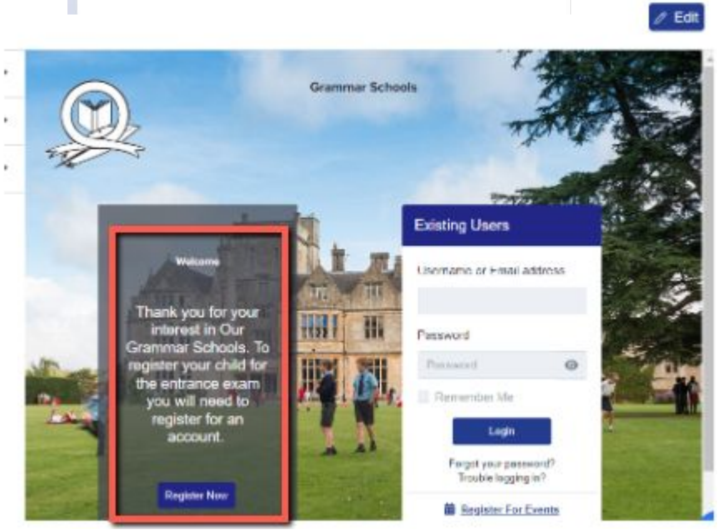
Navigate to settings > form settings > landing page

Here you can edit your initial message to parents and check your configuration mode. For Exams+, this should be set to “only parents can register”.

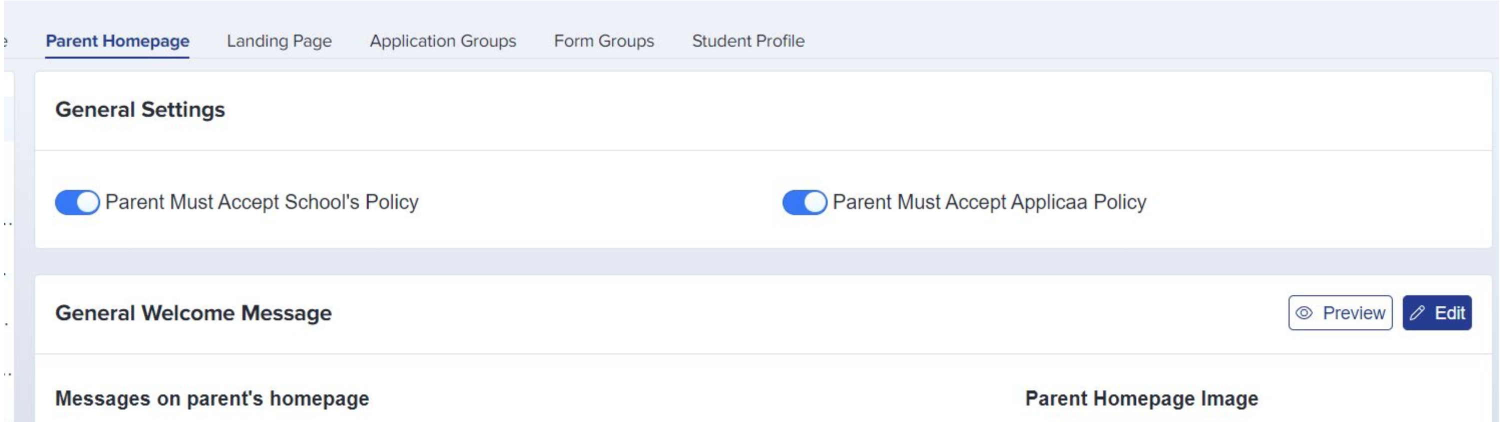
You can also update any images here as needed



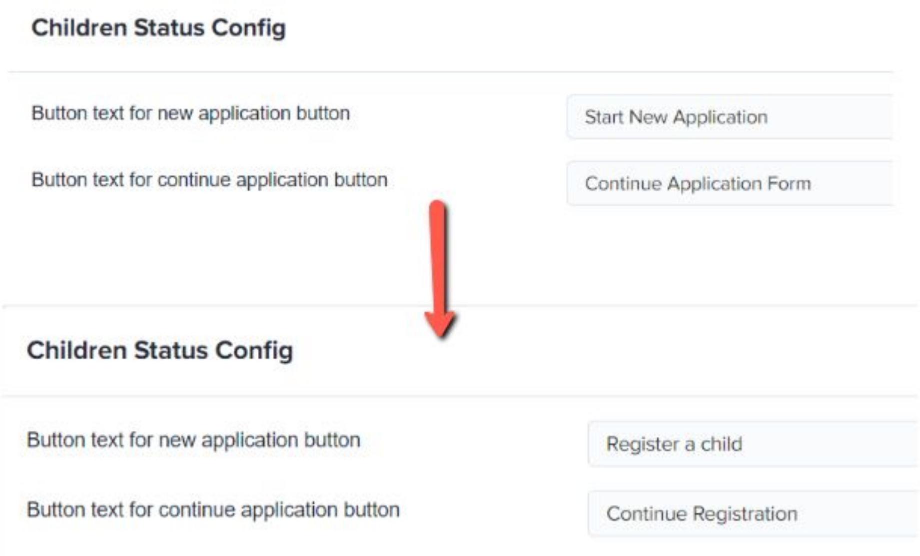




Navigate to “parent homepage” to edit those messages, update your settings and change any images as needed - this is what parents will see once they have logged in.



You could consider changing your configuration to suit your intake:

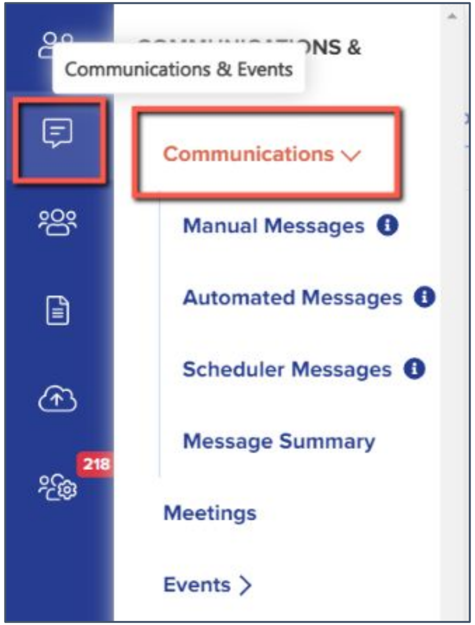


Also turn off:

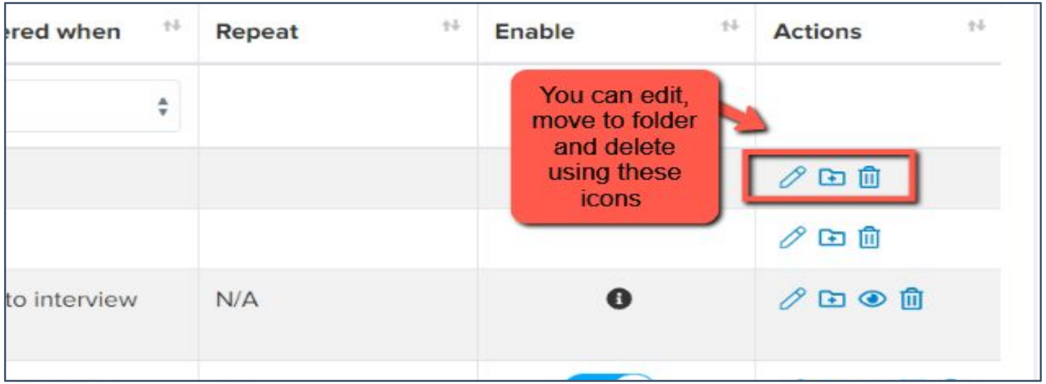
- Show offer status
- Show courses you wish to study
- Show reference status

Checking your email templates

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

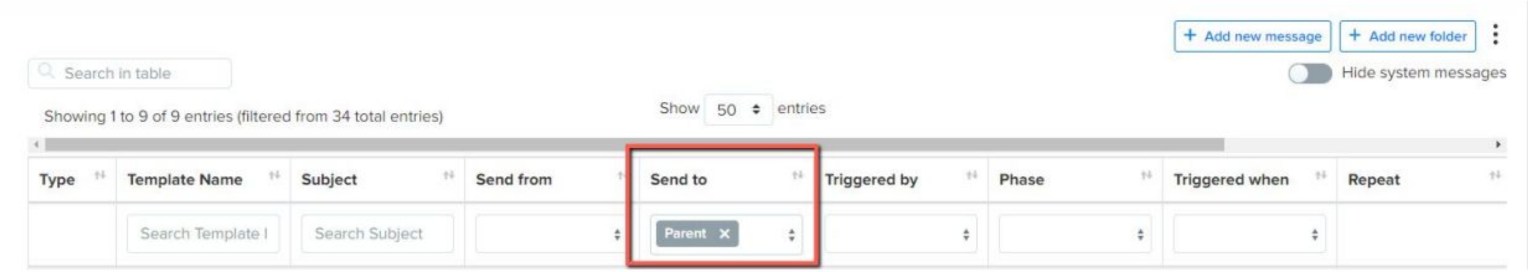


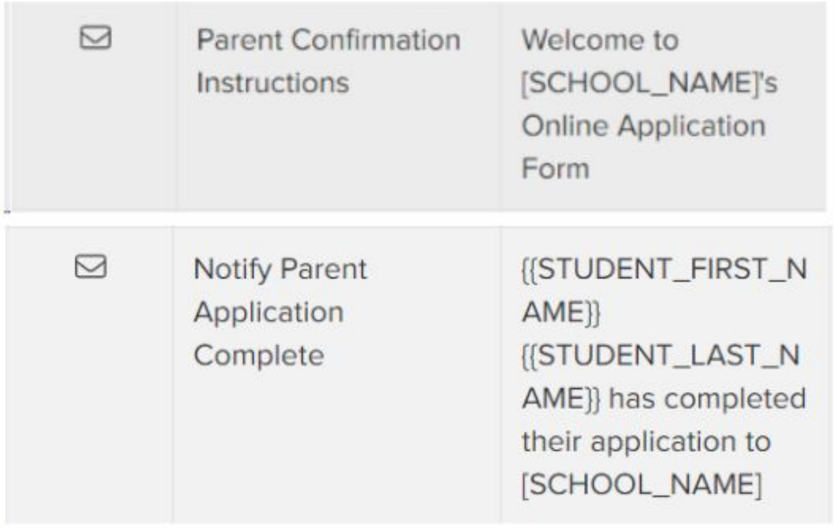
There are some automated emails you will need to check - you can preview and edit them by scrolling right on the table



Top Tip: check all active emails to make sure the wording is appropriate for your setting

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





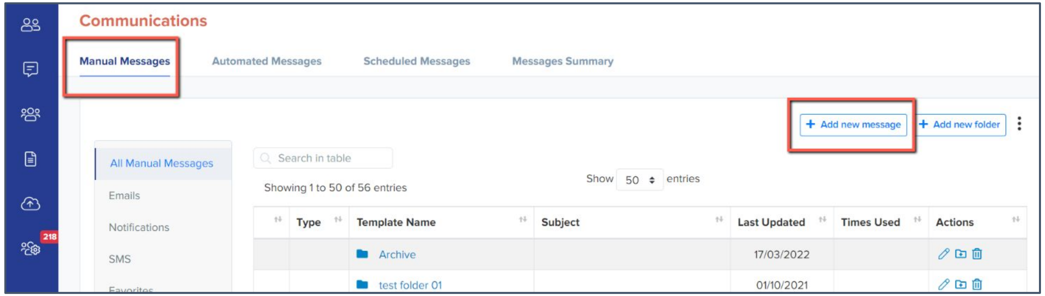
	Parent Confirmation Instructions	Welcome to [SCHOOL_NAME]'s Online Application Form
	Notify Parent Application Complete	{{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} has completed their application to [SCHOOL_NAME]

Once a parent has registered for an account, they are sent this email to verify their email address and gain access to complete your form

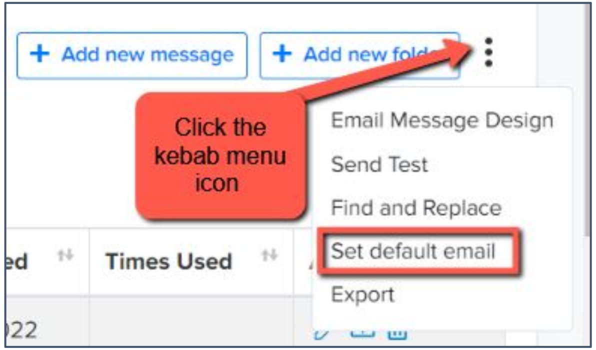
Once a form is completed and submitted, this email is triggered.

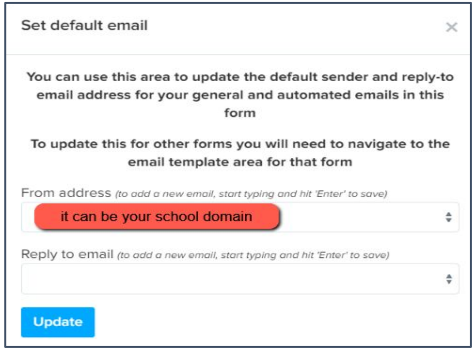
Consider rewording it to fit your purpose - "we have received the completed registration for {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}"

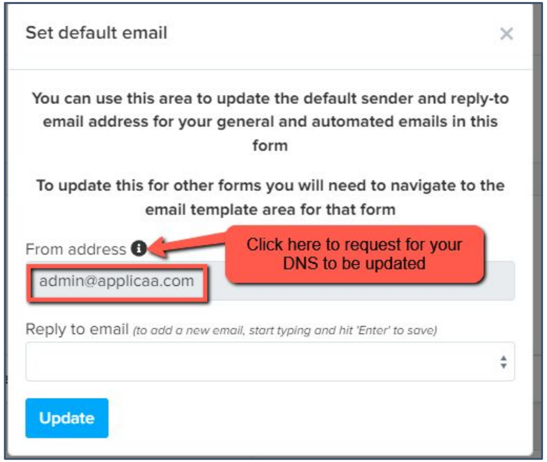
Create any manual templates now so they are set and ready to use later on in the cycle - future you will be grateful!



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

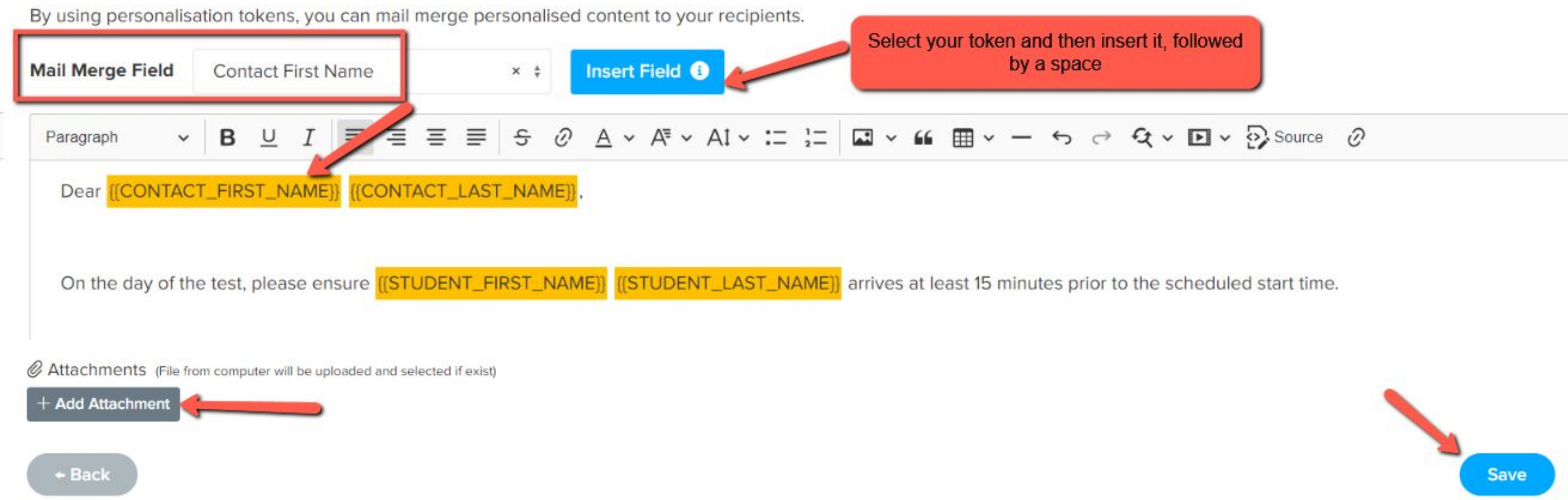






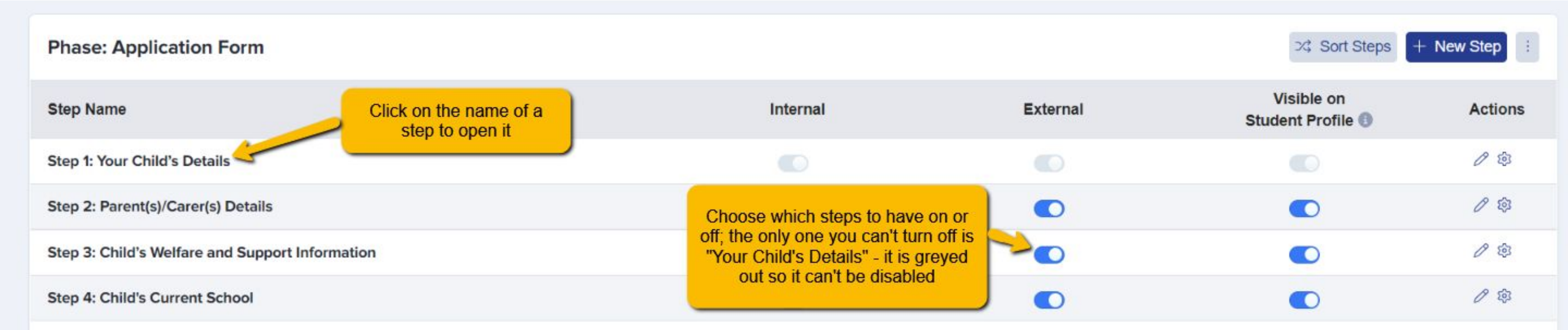
If you are seeing “admin@applicaa.com” in the From address, this means you have not requested a DNS update. You can request this by clicking this icon and adding the details for your IT Manager - it will then mean you can send emails from your own school domain!

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



Configuring the Exams+ Application Form

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.

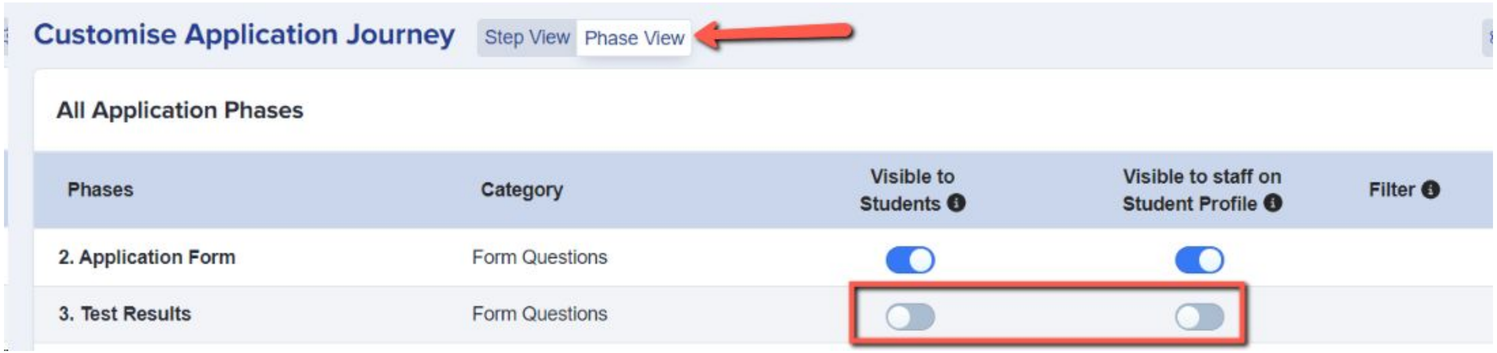


You can choose which steps to have active and which questions you need parents to answer.

Do you need them to provide an image of their child, for example, for confirmation purposes on the day of the test?

Preview your form and check you are happy with the questions and format.

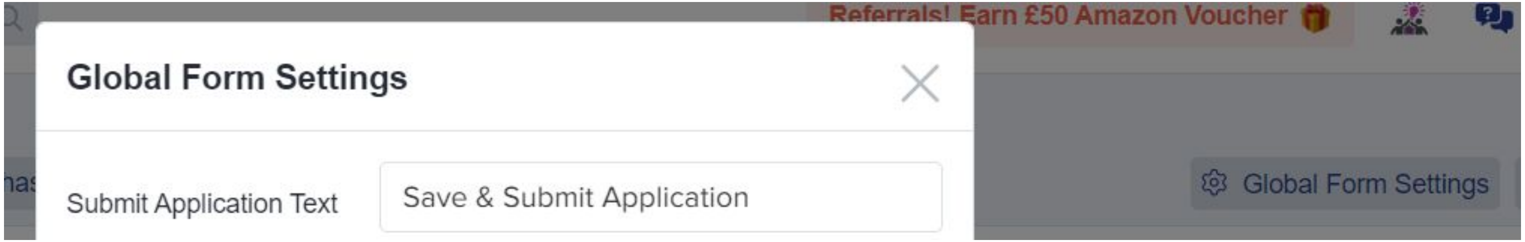
Ensure that your Test Results phase is turned OFF ahead of your launch - parents don't need access to that yet.



Check your Global Form Settings: (settings > application form > global form settings

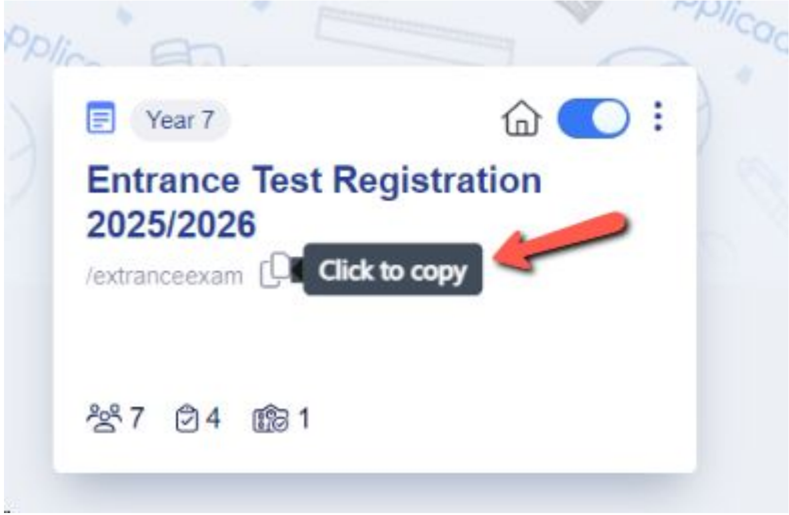
The wording of your “Submit Application Text” button - perhaps consider rewording to “Save & Submit Registration”

Allowing parents to add new applications - at the point of launching your form, ensure the switch preventing parents from adding new applications is turned off



Publish Your Link

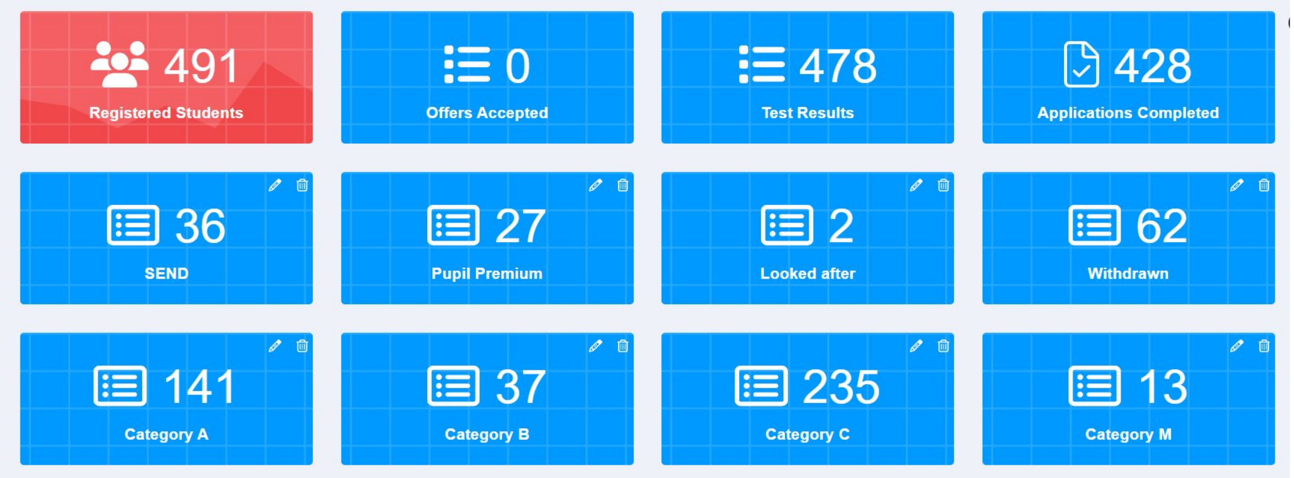
When you're ready to launch, copy your link from the forms area and paste it onto your school or consortium website.



Managing Your Applications

You may receive a large quantity of registrations to sit the test, and it will be important to manage these effectively.

The use of dashboard cards and application groups will be useful to keep track of who is sitting at which test centre (if applicable), who attends on the day of the test and who requires SEN provision, for example.



Create dashboard cards by following the steps in this guide.

Create application groups by following the steps in this guide, and add children to the groups using this guide (you could create groups for "attended" and "did not attend", for example, so you know which list of students to export in preparation for uploading their results).

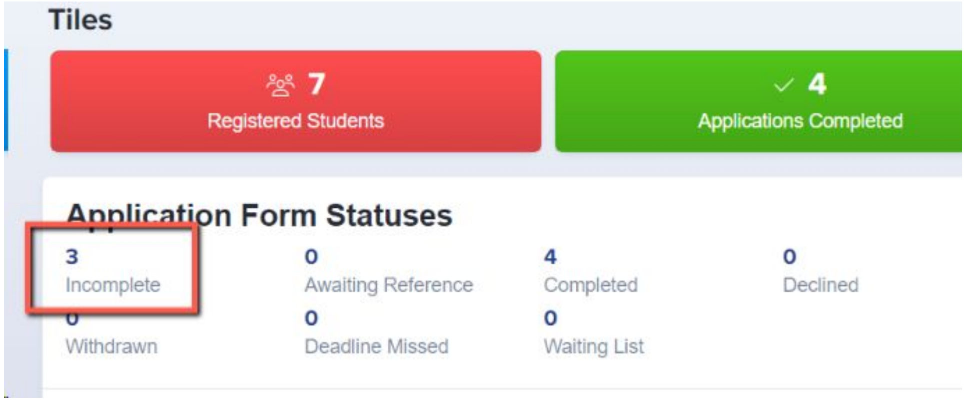
Chasing Incompletes

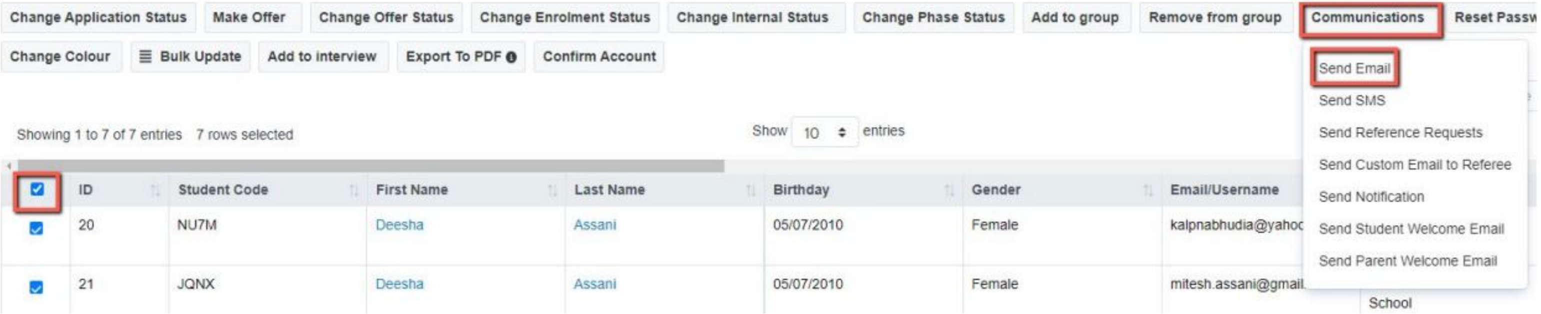
You can chase incomplete forms by sending reminders to the parents - either manually, or by scheduling an automated chaser.

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.

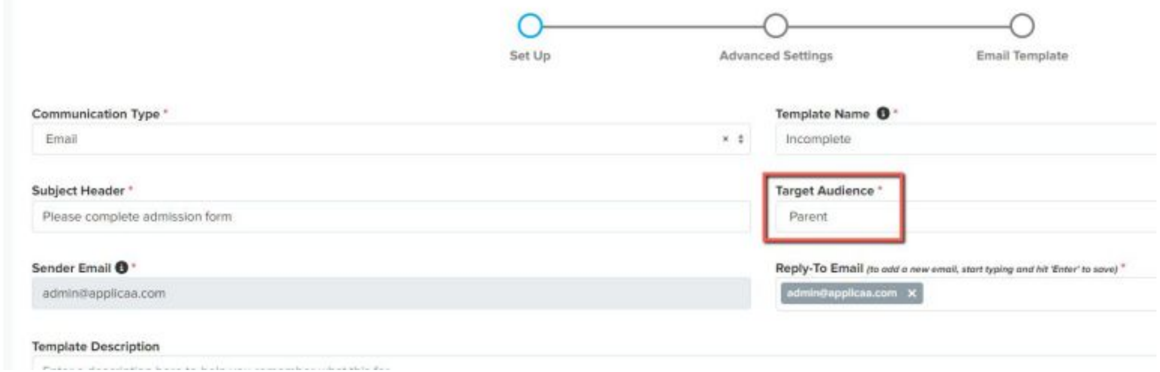


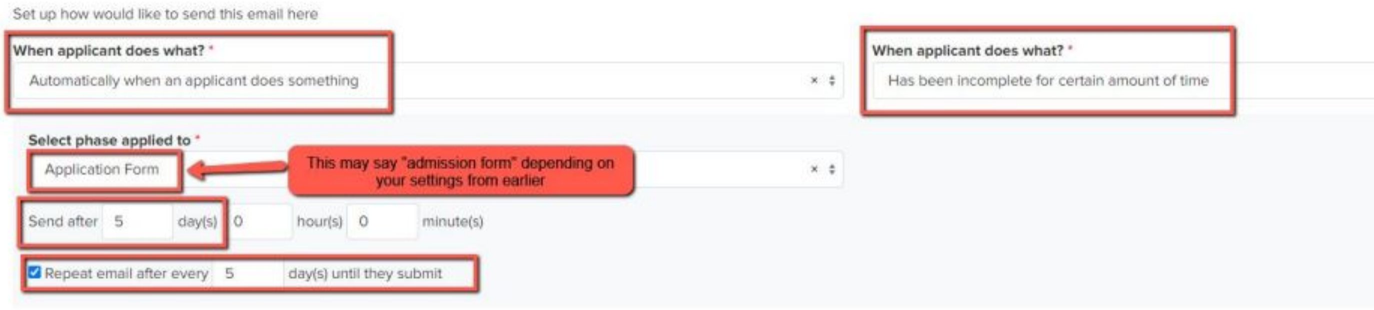


To schedule an auto-chaser, navigate to communications and events > communications > manual messages and click +New Message

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”.

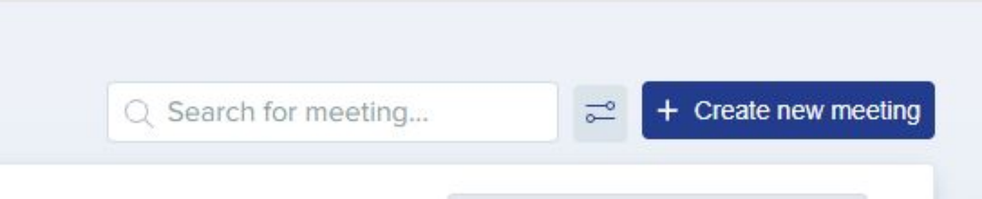
When a student’s form meets these parameters, the email will then be triggered and sent to the parent automatically.





Scheduling Your Test

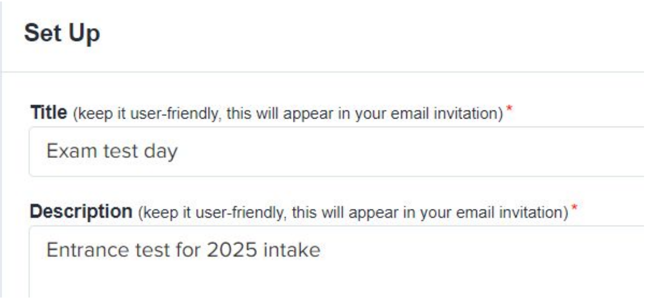
You can use the **Meetings** area to schedule the times and locations of your test, and then invite parents to confirm the attendance of their child

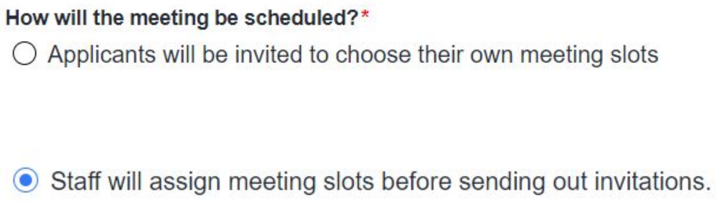


Communications & Events > Meetings NEW

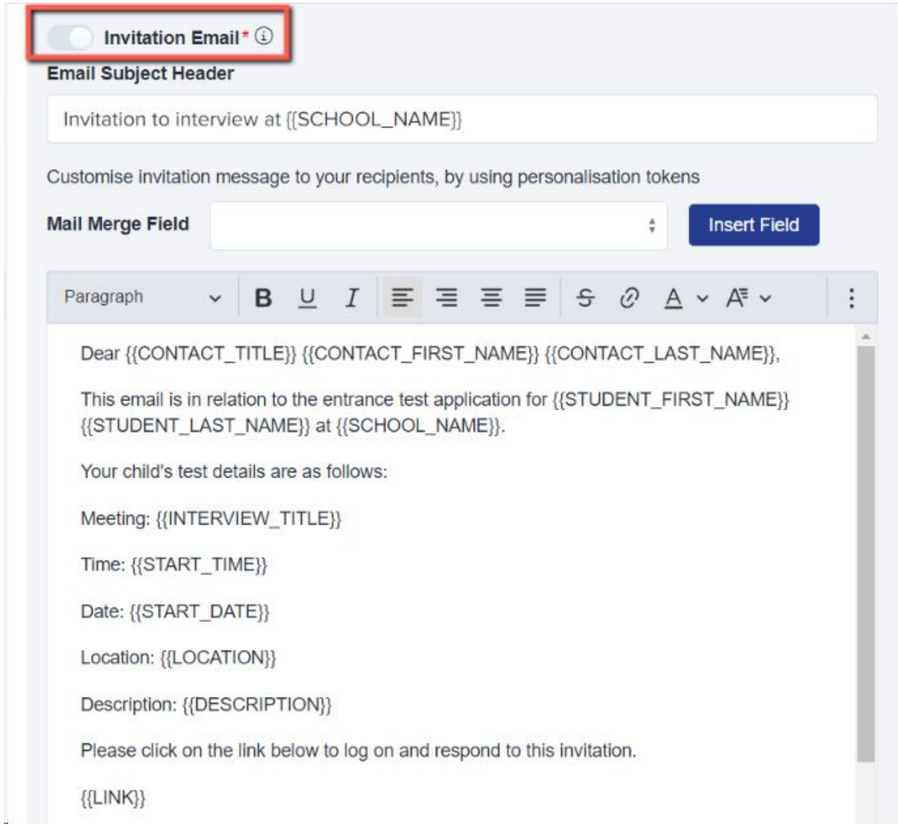
Click to "Create new meeting"

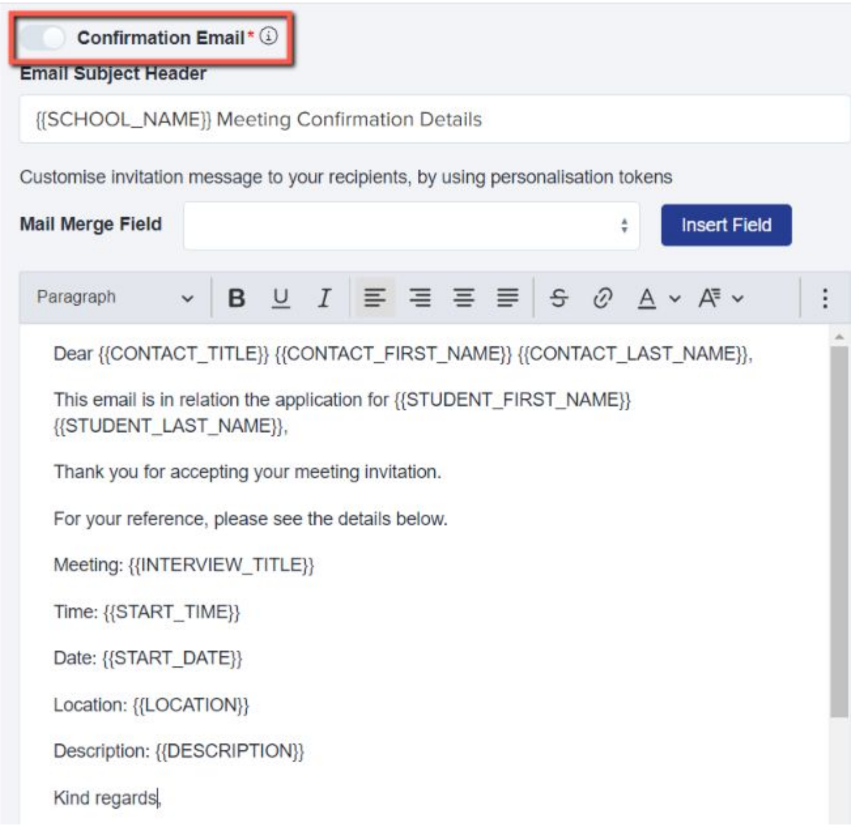
Complete the Set Up step by adding the title and description of the meeting, as well as deciding how the meeting will be scheduled - will you allow them to choose their own timeslot, or will you assign these for them?



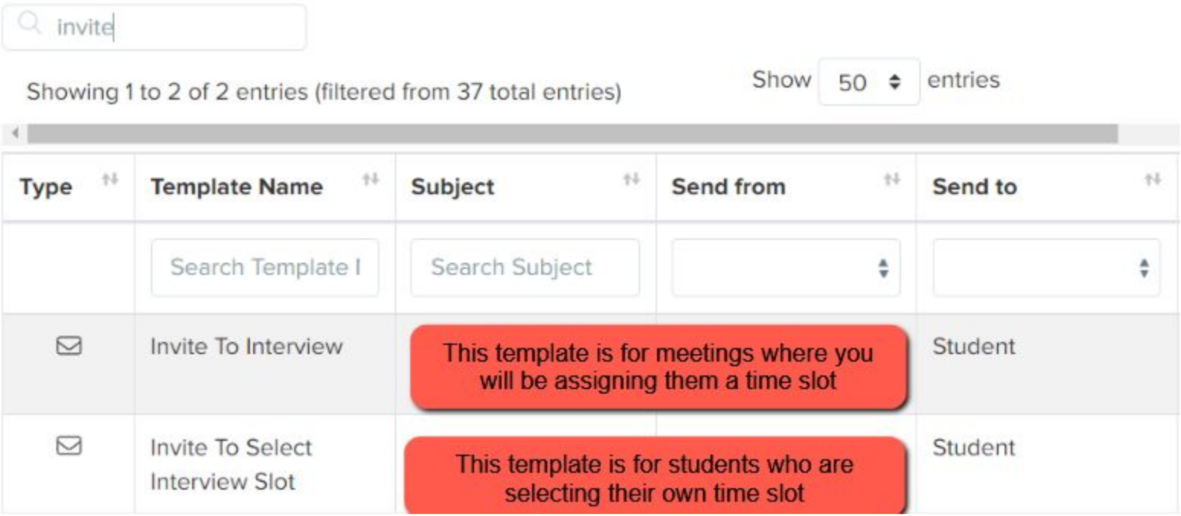


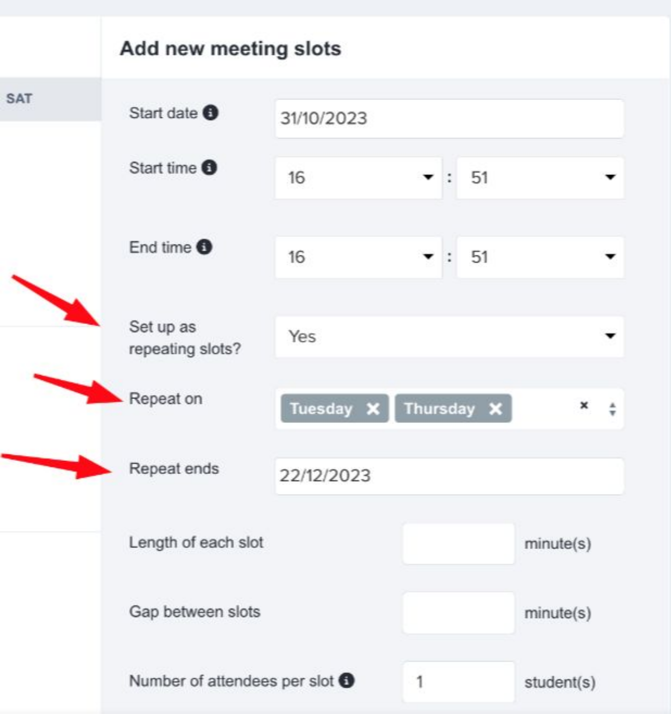
Configure the corresponding email templates:





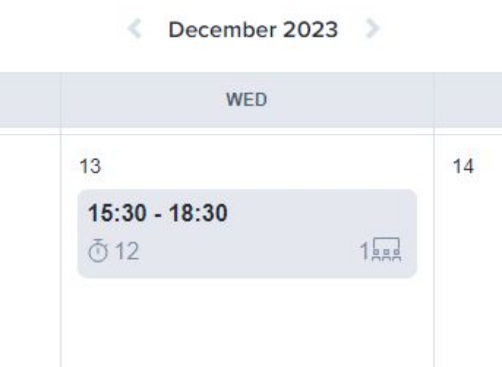
Note - you can check and amend the master copies of your invitation templates by navigating to communications and events > communications > automated messages if required.





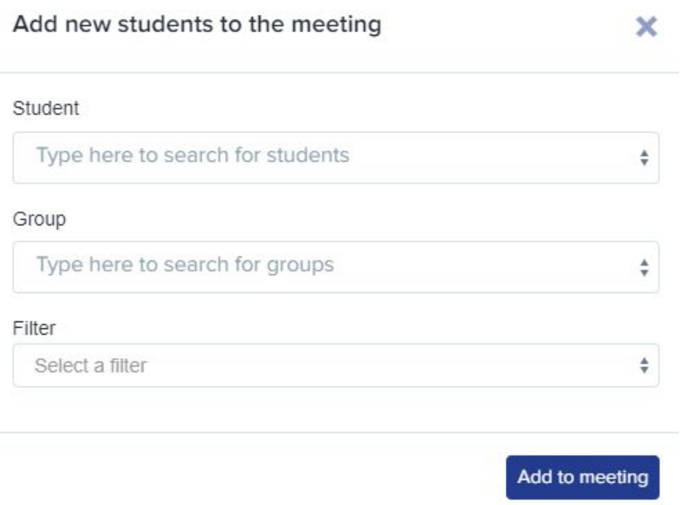
Add the date of the session, and set the session start and end times, and how many students can be accommodated in that session.

You'll then be able to assign staff to each slot if required, and add a location.



The meeting will then be displayed on the calendar, and you can repeat the process to add as many more sessions/times/locations as needed.

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.



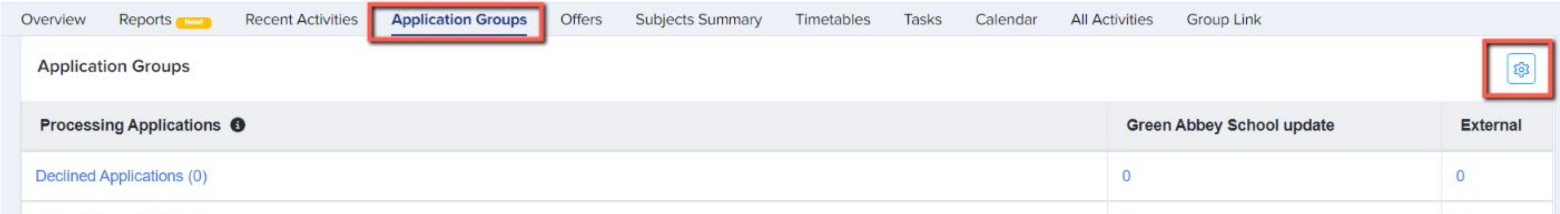
Depending on your setup, you will either be prompted to **invite students** (if they are choosing their own slots) or **allocate students and then invite them** (if you are assigning appointments for them).

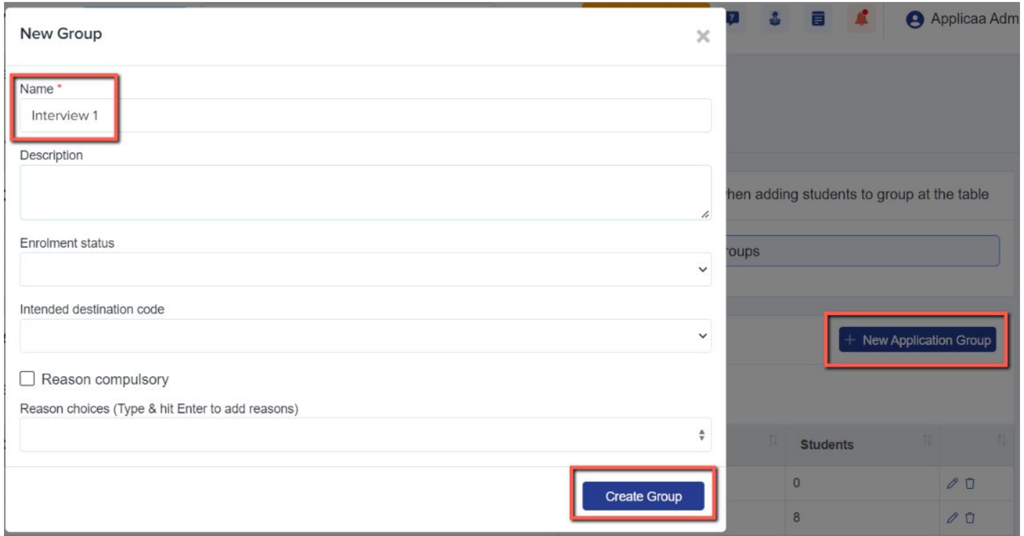
When you click to invite the students, you will be shown the email template again so you can check it before clicking send.

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.

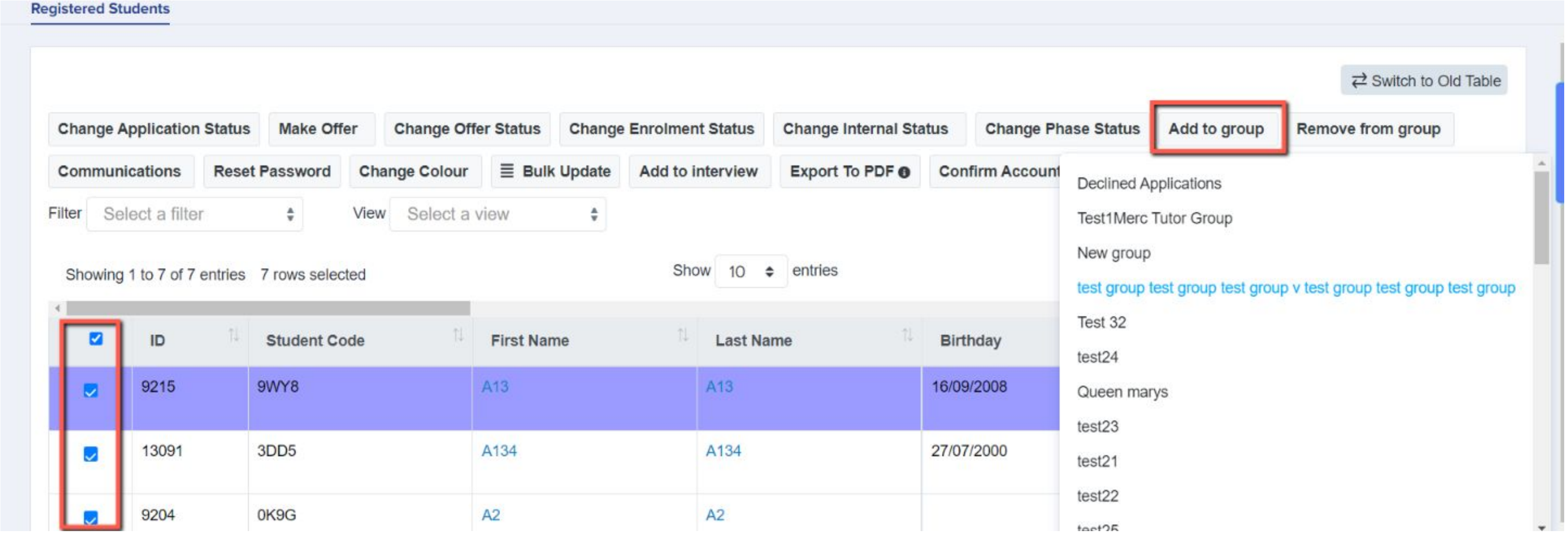
To create an application group, click the “application groups” tab and then click the settings cog on the top right of the table:





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:



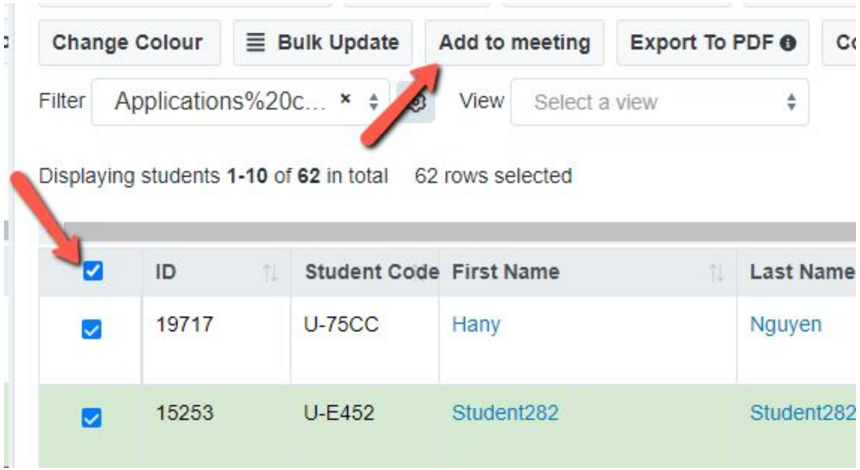
Return to the meetings area to add your group to the meeting - this does not send an invitation to the parents automatically, so you can add students in prior to being ready to send your invitations!

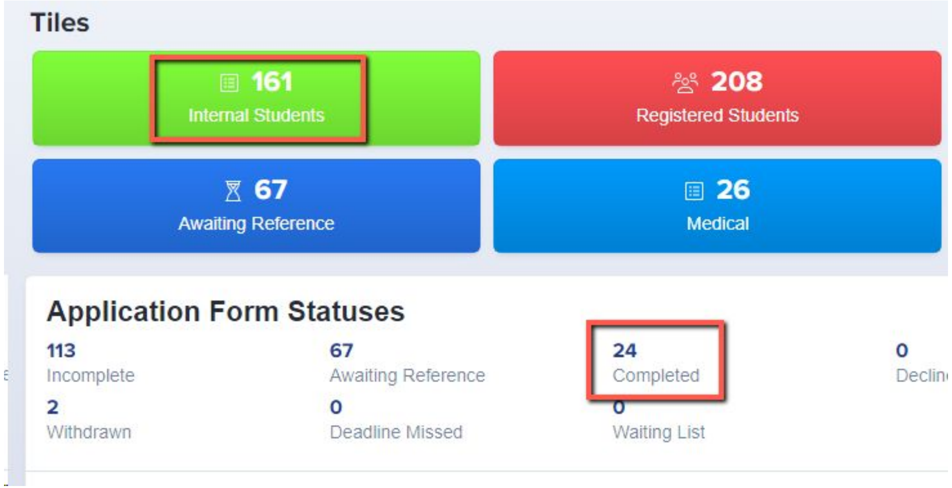
Adding students to a meeting from your main dashboard

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 send your invitations.

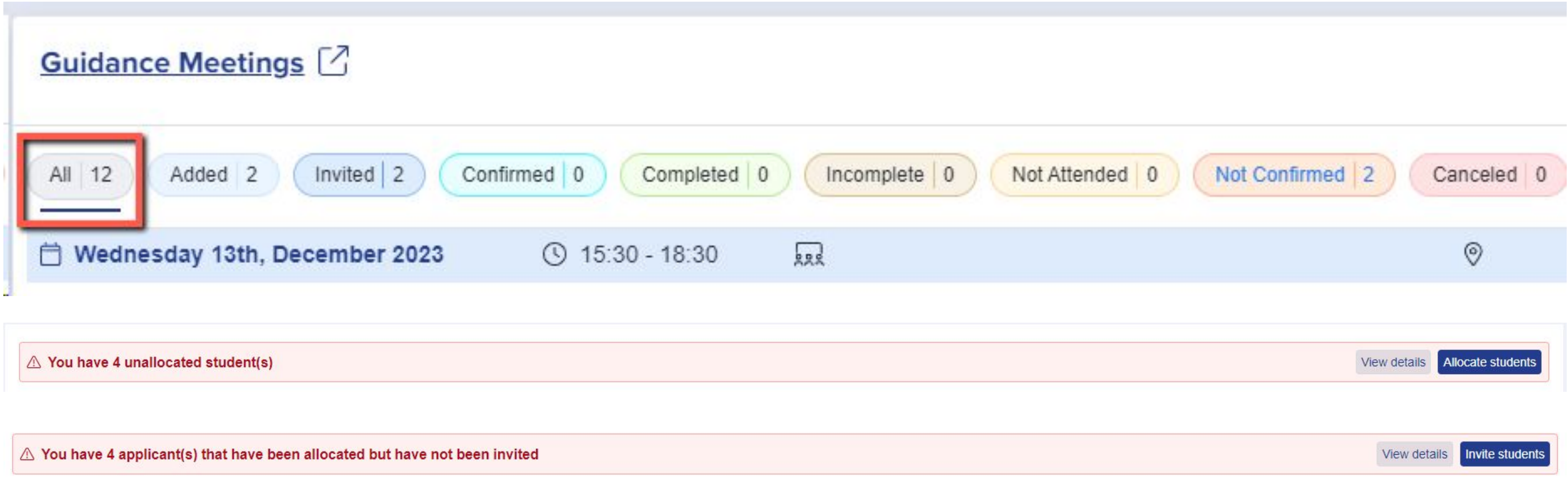




Inviting applicants to interview

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

You will be notified if you have added any students who have not yet been allocated and/or invited.



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.

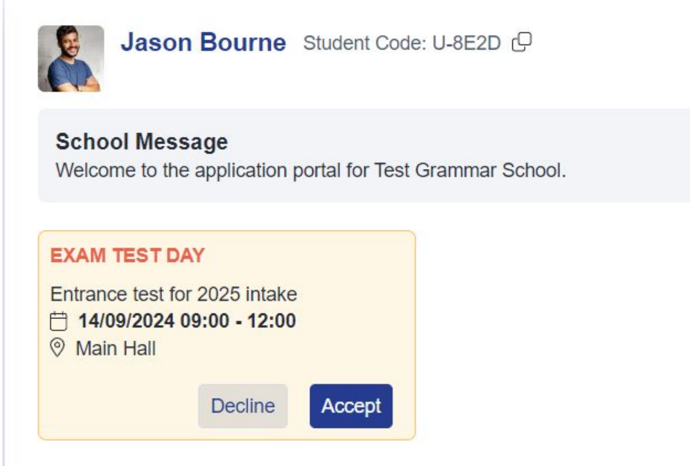
Invitations have to be sent in order for the parents to be able to respond (accept or decline) so you can track responses.

Displaying **12** students

Show 50 entries

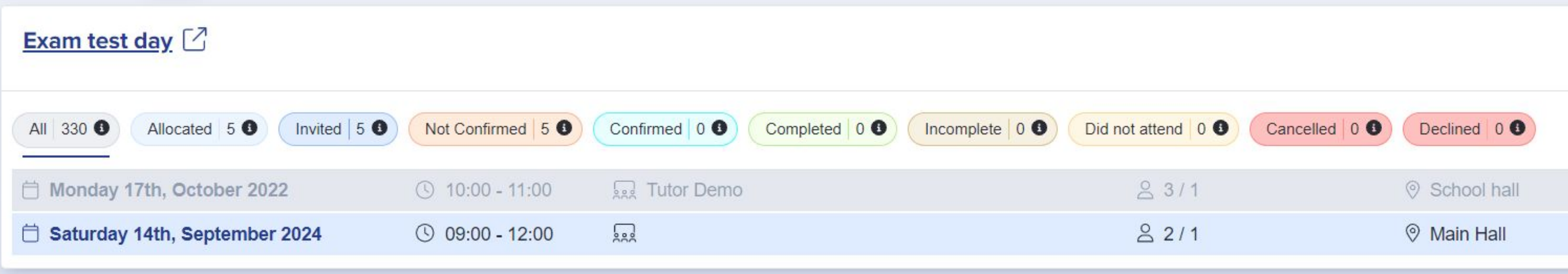
	Meeting Date	Time	Student Code	Email/Username	School	Room	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status
☐	03/11/2023	12:00 - 12:30	U-47EA	frost@example.com	Greenford High School - Sales Demo		Accepted	Enrolment waiting list	New Ranked Group	denied	delivered 20/10/2023 09:02:56 AM
☐	03/11/2023	12:00 - 12:30									

Tracking responses to invitations



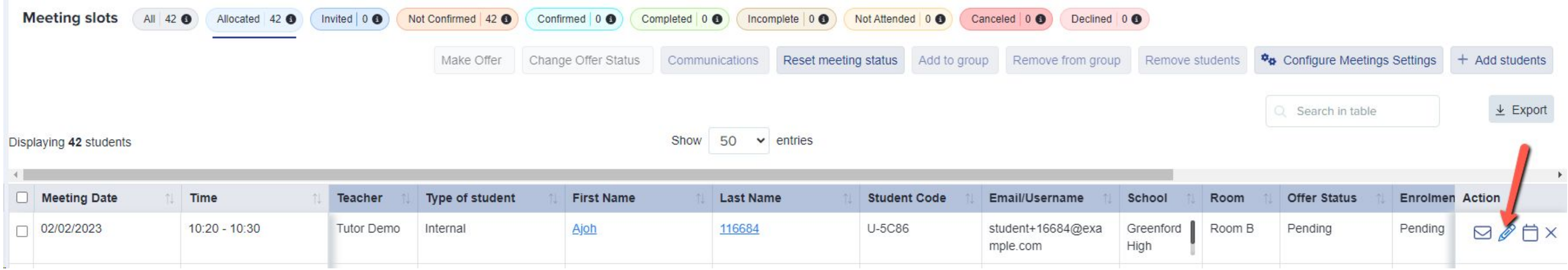
Once you have sent your invitations, parents will log into their accounts and will see something like this.

You can track their responses by clicking on the coloured boxes in your meetings area.

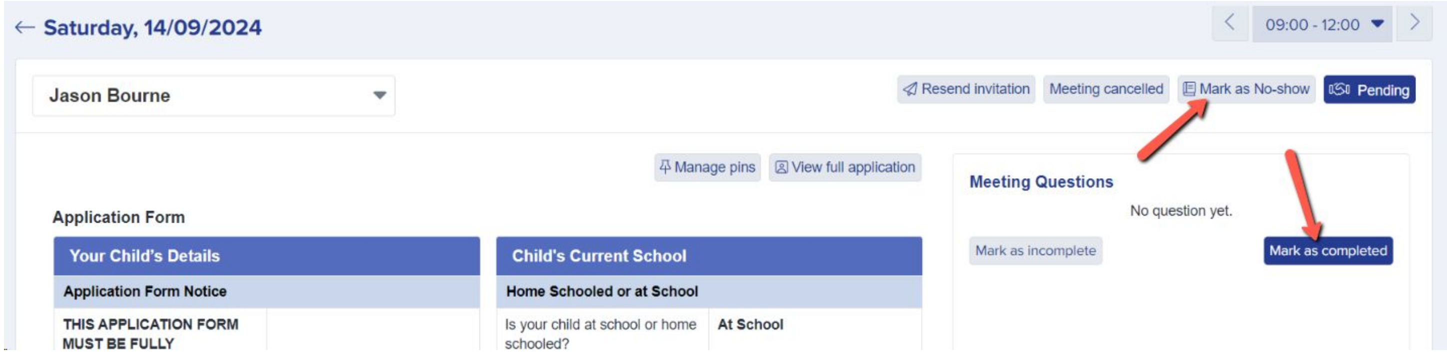


Registering Attendance

You can access an appointment directly from your meetings area, by clicking the pencil icon



Mark as “completed” if the child attended and sat the test, or “no-show” if they did not

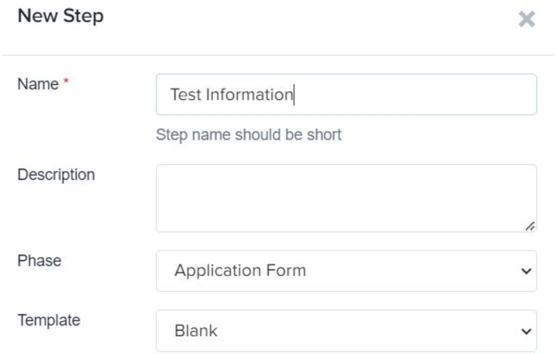


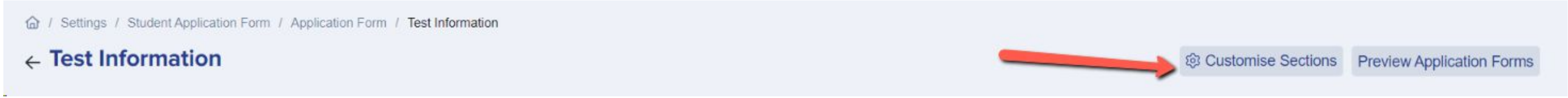
Imports

You can upload any other data which will be of use to you in managing your exams process.

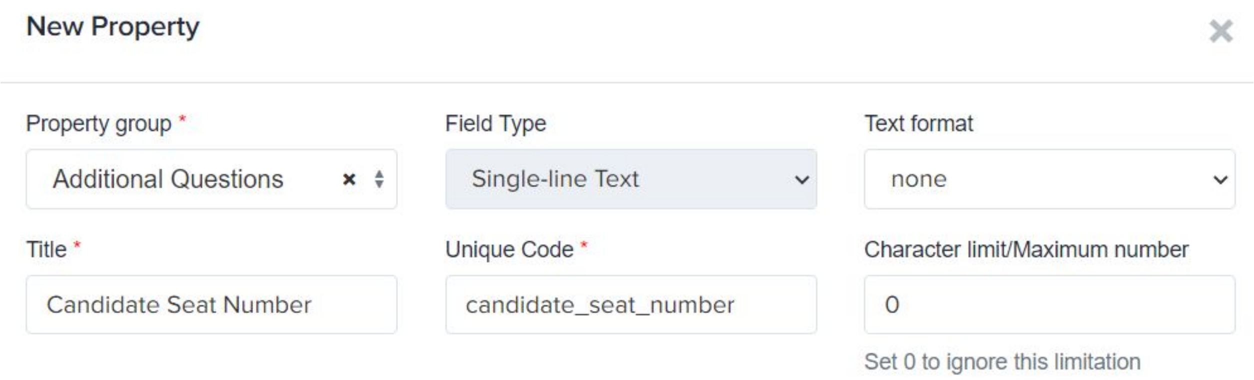
For example, if you need to allocate seat numbers to each child, you could import that information into Exams+ and then email it to parents ahead of the test.

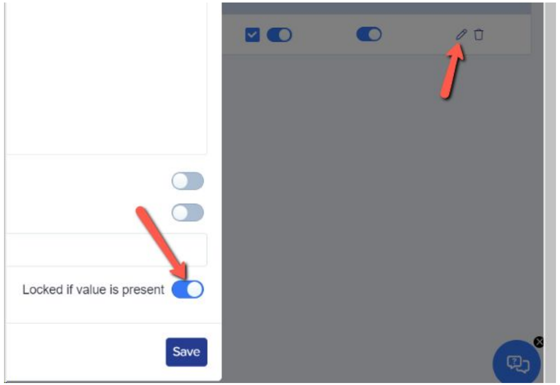
You would first need to create the field in your application form. Navigate to settings > application form and either use an existing step, or create a new one (maybe called Test Information).



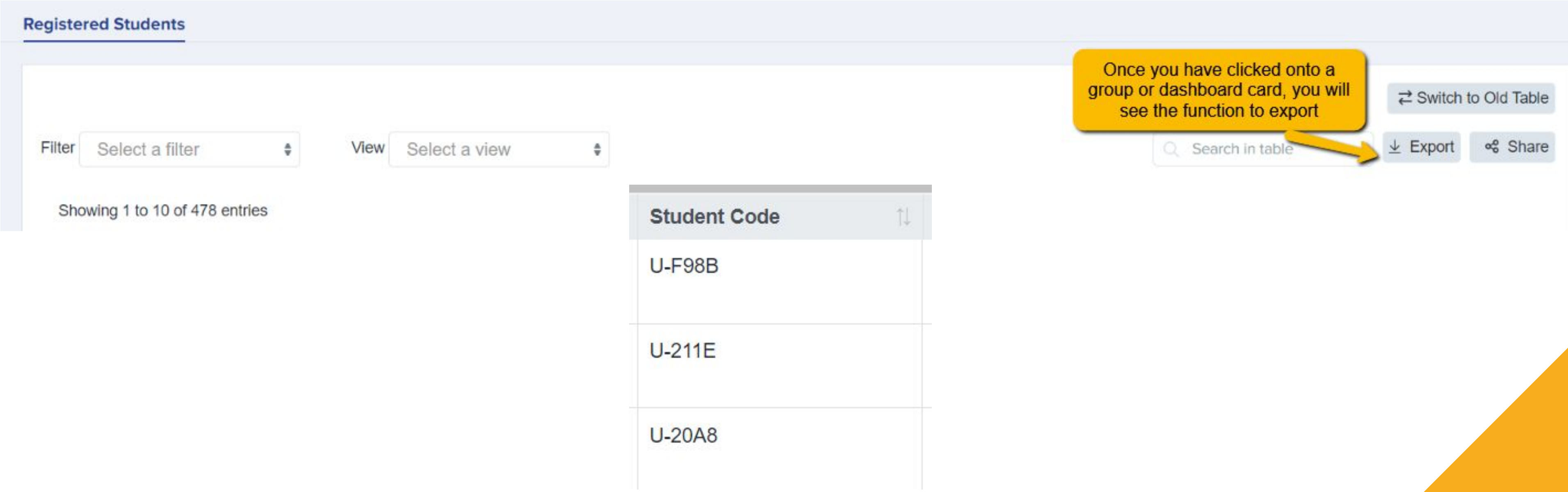


Use the Customise Sections button to add a section to your step, and then select the + New button to add any new fields as required. If you want parents to see the data but not be able to amend it, select “locked if value is present”.

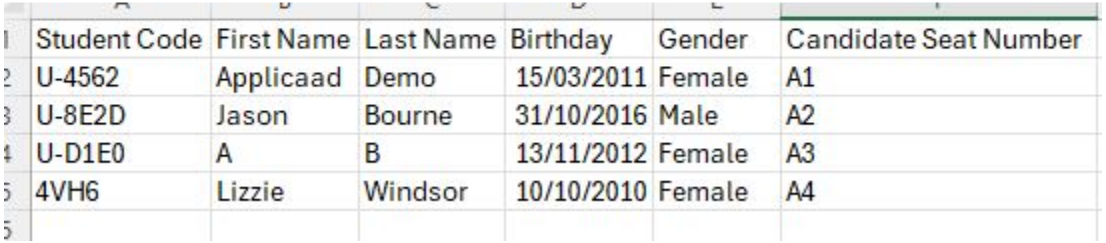




You will need to export a list of all children who are registered to sit the test, so that you have a CSV file containing their key information, including their unique code. The unique **student code** is essential for successfully importing the results data and linking it to the correct child.



Add your data to the CSV you exported and save your file.

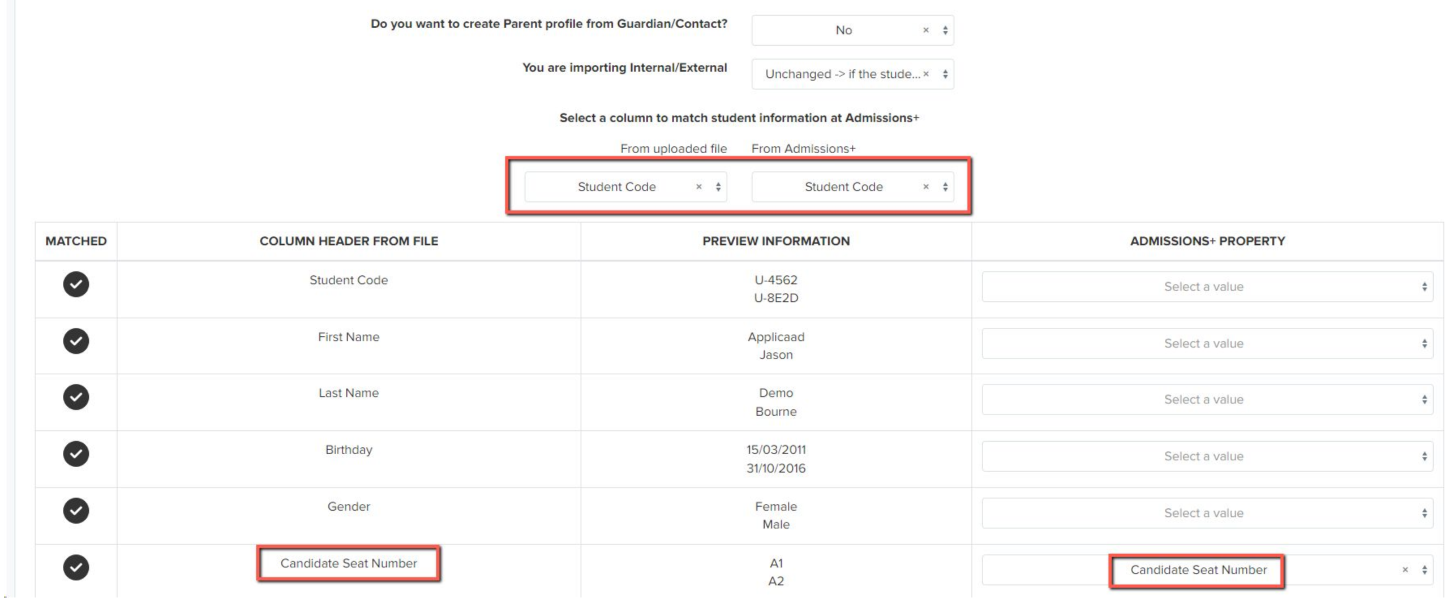


Student Code	First Name	Last Name	Birthday	Gender	Candidate Seat Number
U-4562	Applicaad	Demo	15/03/2011	Female	A1
U-8E2D	Jason	Bourne	31/10/2016	Male	A2
U-D1E0	A	B	13/11/2012	Female	A3
4VH6	Lizzie	Windsor	10/10/2010	Female	A4

Go to **Data > Import > Start an Import** and name your file.

Select **Users > Existing Users > Students** and then attach your CSV file.

Map your import as follows:



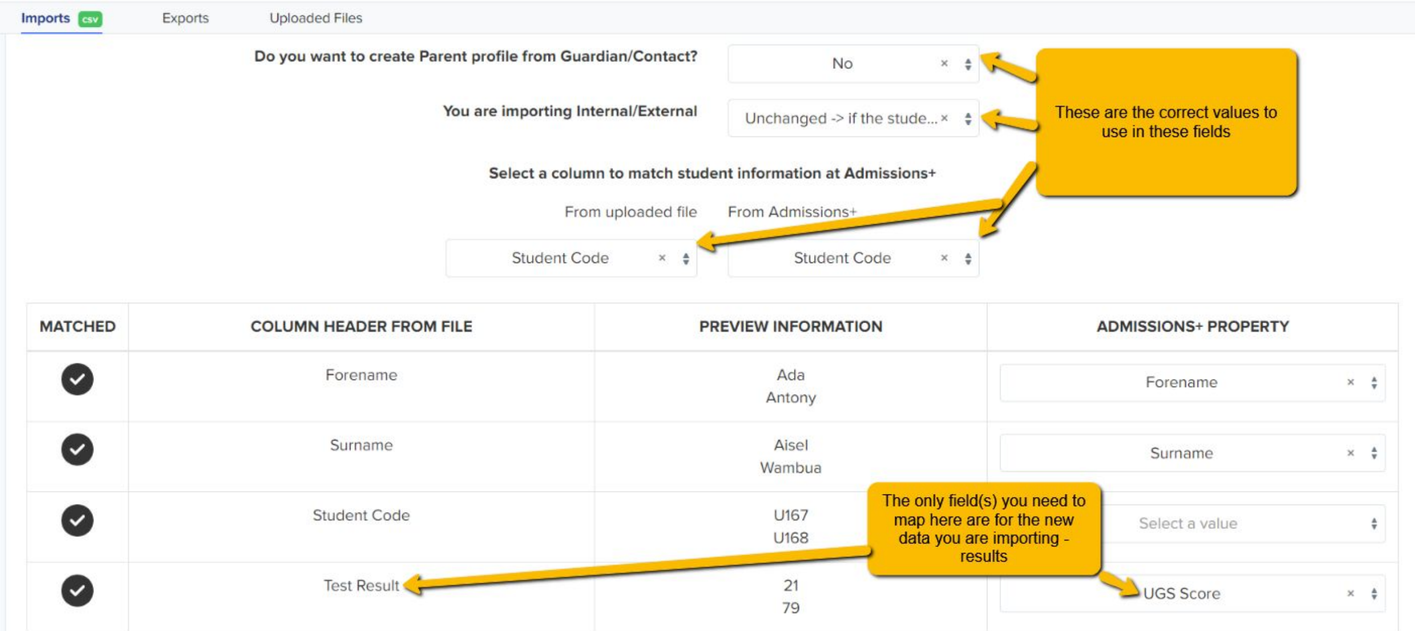
Uploading Test Results

Export a CSV of the children, and add your results data to the CSV you exported.

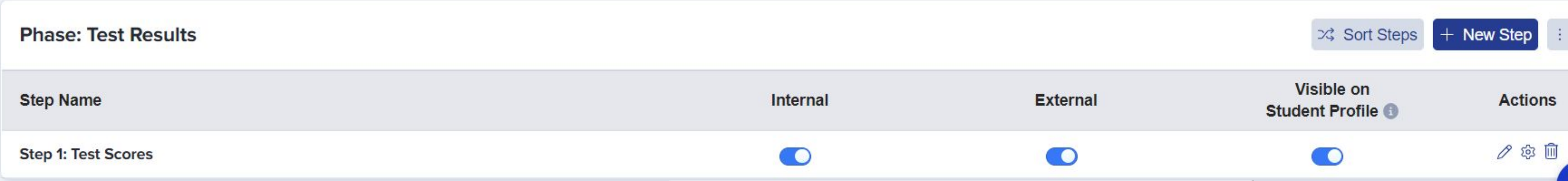
Go to Data > Import > Start an Import and name your file.

Select Users > Existing Users > Students and then attach your CSV file.

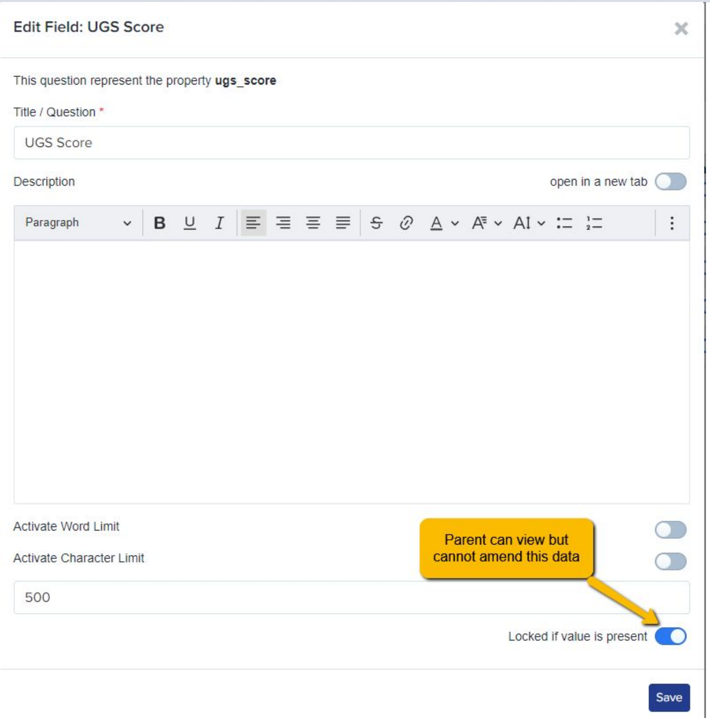
Map your import as follows:



The Test Results Phase

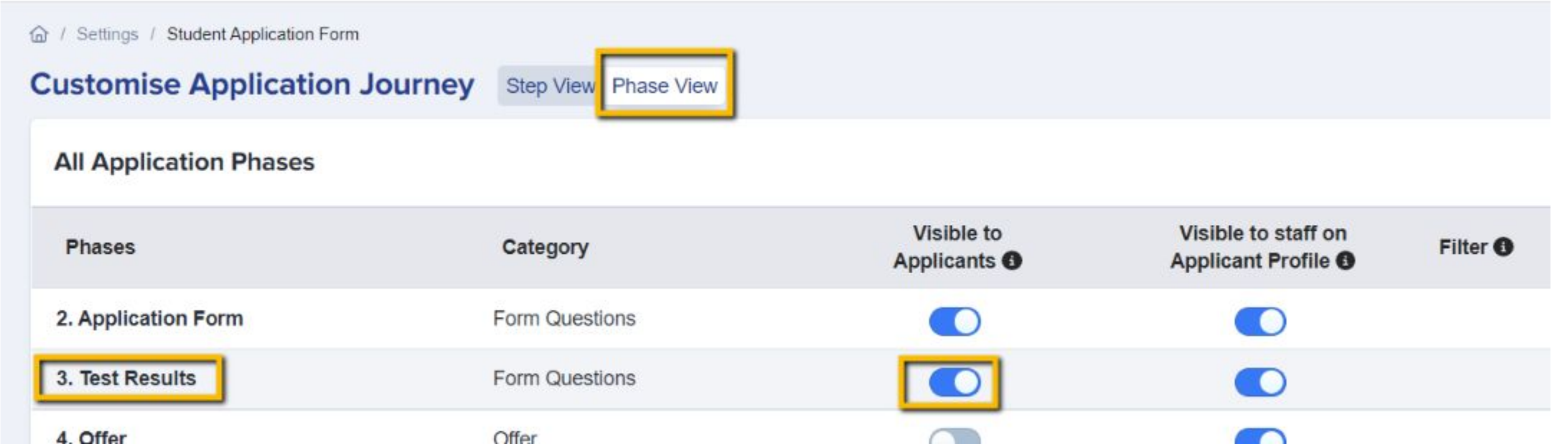


This phase is an "office use" phase; it is configured so that you can add data to it (their results) but that the parents can only view this information; **they cannot make changes to it.**

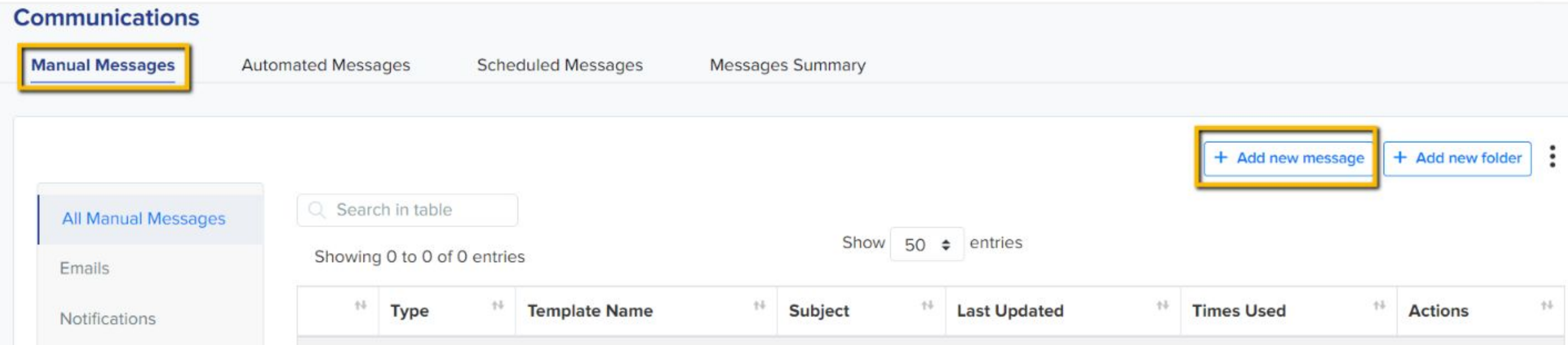


You can choose whether or not to have the Test Results phase active by navigating to **Settings > Application Form > Phase View**. If you activate it, you can then invite parents to log into their accounts and they will be able to click and view their child's results.

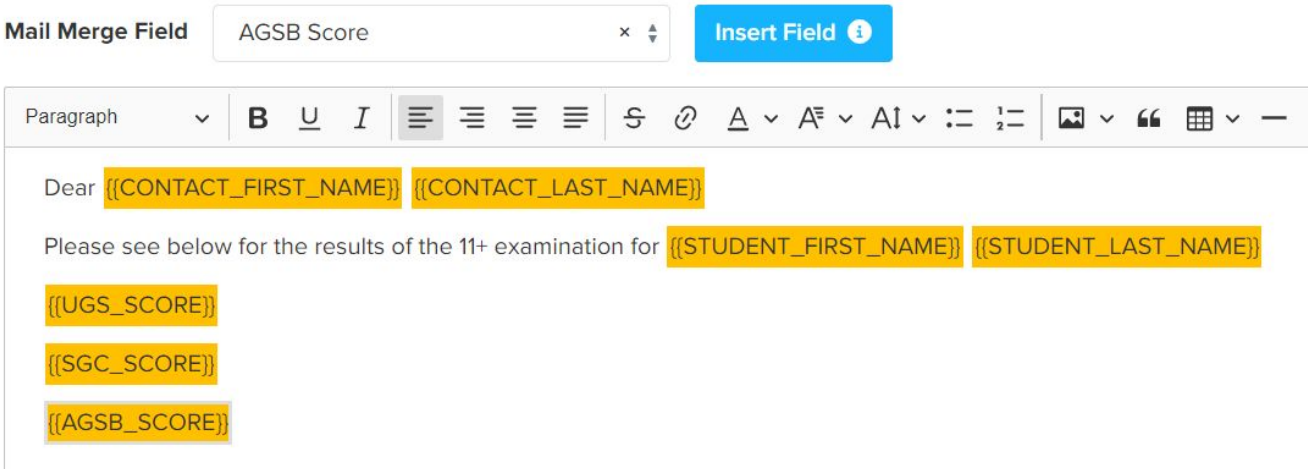
If you do not want parents to see the results in this way, do not turn on the phase.



You can create a Manual Message email template to send the results to the parents by email.



When creating the email, ensure to use the mail merge fields for any data you wish to share with the parents. You can then send the test results email to parents of all children who sat the test and for whom you have received results.



Do you have any questions?

THANK YOU