

Setting up your new cycle

Exams+

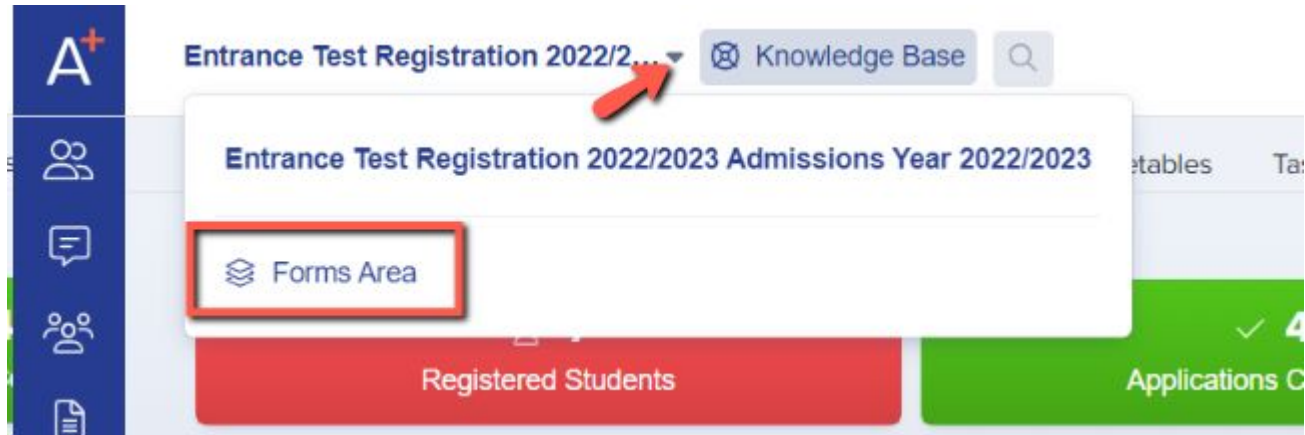


THE TIMELINE

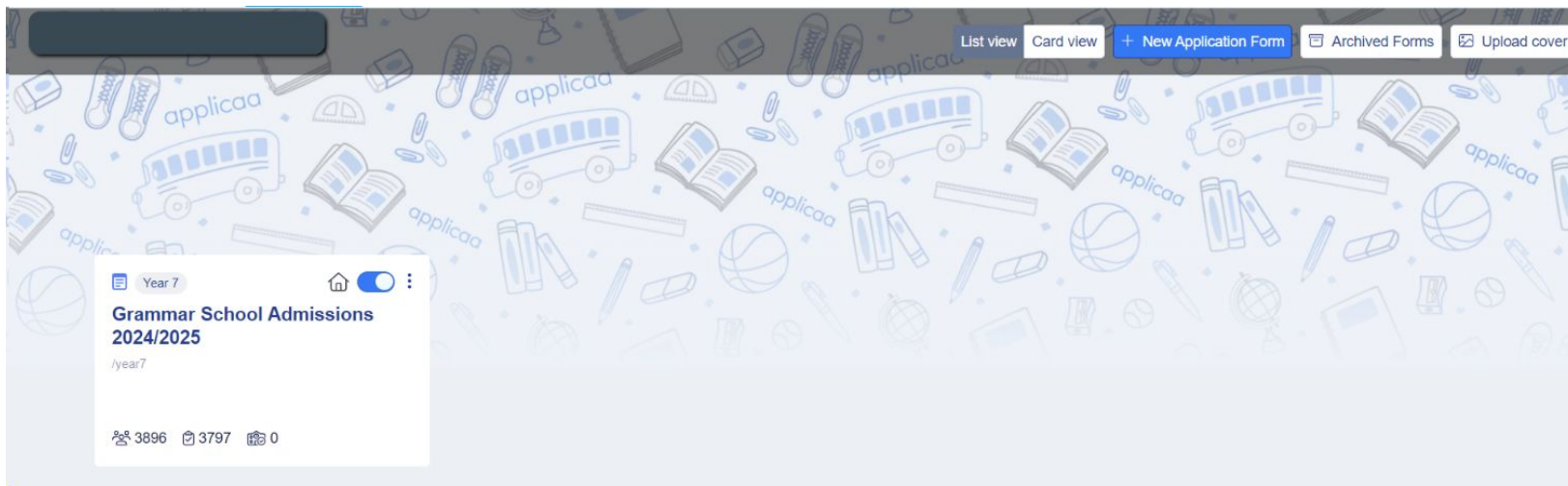
1. You create a new form for the next Exams+ season and configure the questions which need to be answered by parents - you do this by cloning last year's form.
2. You publish the link to your new season's form so parents can register, create an account and apply for their child to sit the test (Summer 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

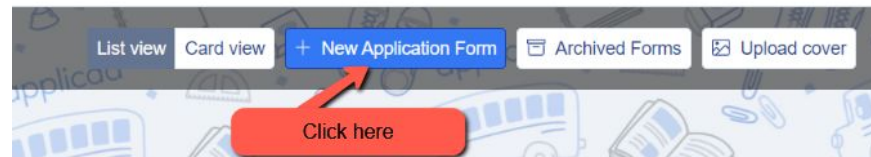
Click on the blue wording in the upper left of your dashboard and then click “forms area”



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



New Application Form ✕

Form Name*

External Form Name (to parents & students)

What type of form are you creating?* ⌵

System Template (includes Email Templates, Application Groups & Courses)* ⌵

Application Form Template (included application steps, questions and phases)* ⌵

Set this as my default application form ⓘ

Admissions Year* ✕ ⌵

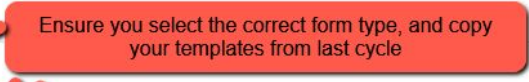
Years of Form* ✕ ⌵

Customise the ending of the URL for this form e.g. demo.applicaa.com/Year12 (to add a new URL, start typing and hit enter) ⌵

Send different emails linked to Expected Year Group

Create Application Form

Ensure you select the correct form type, and copy your templates from last cycle



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

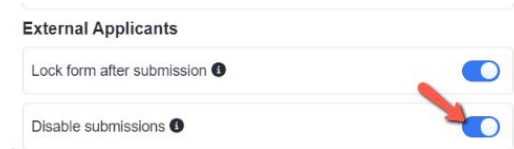
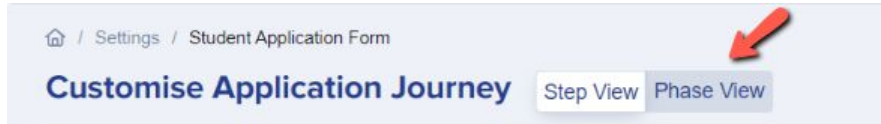
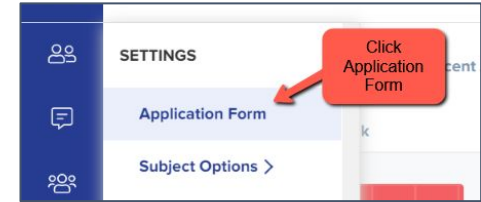
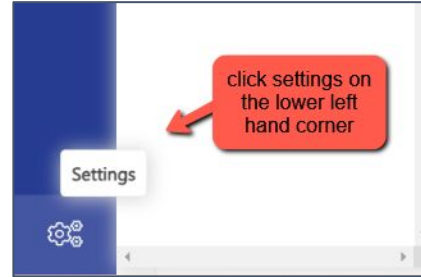


How to close your old form



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

In your old form:

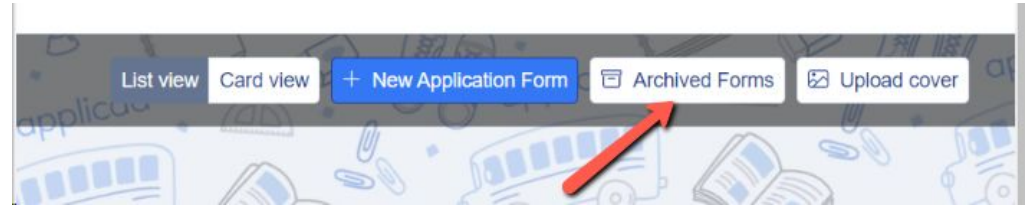
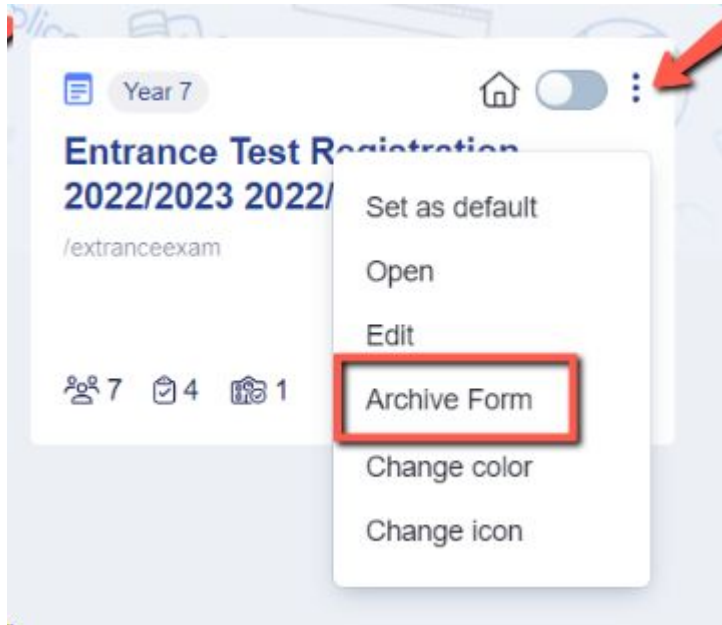
Navigate to settings > application form > phase view and click the pencil icon to turn on "disable submissions" for every phase



All Application Phases Sort Phases New Phase

Phases	Category	Visible to Students ¹	Visible to staff on Student Profile ¹	Filter ¹	Actions
2. Application Form	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
3. Test Results	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

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

The screenshot shows the editor interface for the landing page. Three red boxes highlight the following elements:

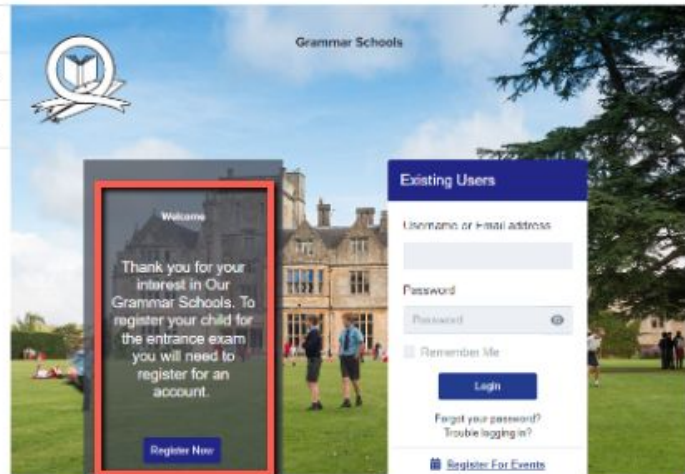
- New application title:** A text field containing the word "Welcome".
- Description:** A rich text editor containing the text: "Thank you for your interest in Our Grammar Schools. To register your child for the entrance exam you will need to register for an account." The editor includes a toolbar with options for Paragraph, Bold, Underline, Italic, Bulleted List, Numbered List, Link, Unlink, Text Color, Background Color, and Font Size.
- Button text for new application button (For only Parents):** A text field containing the text "Register Now".

The screenshot shows the "Configuration Mode" settings panel. It includes the following text and options:

Configuration Mode

Choose your landing page configuration mode:

- Only students can register ⓘ
- Students & Parents can register ⓘ
- Students and parents must be imported by staff ⓘ
- Only parents can register ⓘ
- New Application area hidden completely



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.

Parent Homepage | Landing Page | Application Groups | Form Groups | Student Profile

General Settings

Parent Must Accept School's Policy Parent Must Accept Applicaa Policy

General Welcome Message

[Preview](#) [Edit](#)

Messages on parent's homepage Parent Homepage Image

You could consider changing your configuration to suit your intake:

The diagram illustrates a configuration change for 'Children Status Config'. It shows two versions of the configuration interface. The top version has two buttons: 'Start New Application' and 'Continue Application Form'. The bottom version has two buttons: 'Register a child' and 'Continue Registration'. A red arrow points from the top version to the bottom version, indicating the change.

Children Status Config	
Button text for new application button	Start New Application
Button text for continue application button	Continue Application Form

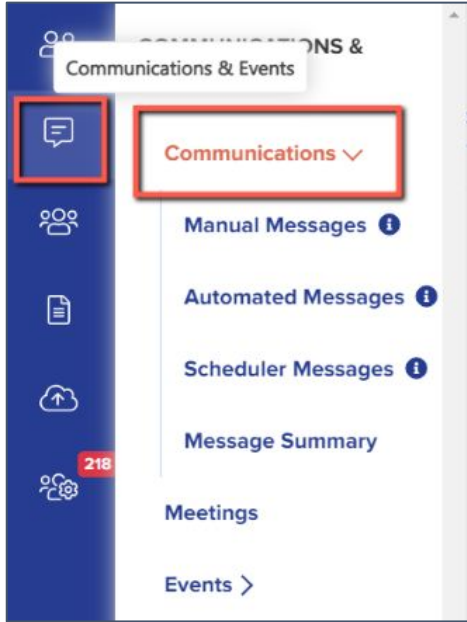
Children Status Config	
Button text for new application button	Register a child
Button text for continue application button	Continue Registration

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

Created when	Repeat	Enable	Actions
			  
			  
to interview	N/A		   

You can edit, move to folder and delete using these icons

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”:

Search in table

+ Add new message + Add new folder

Hide system messages

Showing 1 to 9 of 9 entries (filtered from 34 total entries) Show 50 entries

Type	Template Name	Subject	Send from	Send to	Triggered by	Phase	Triggered when	Repeat
	Search Template I	Search Subject		Parent				

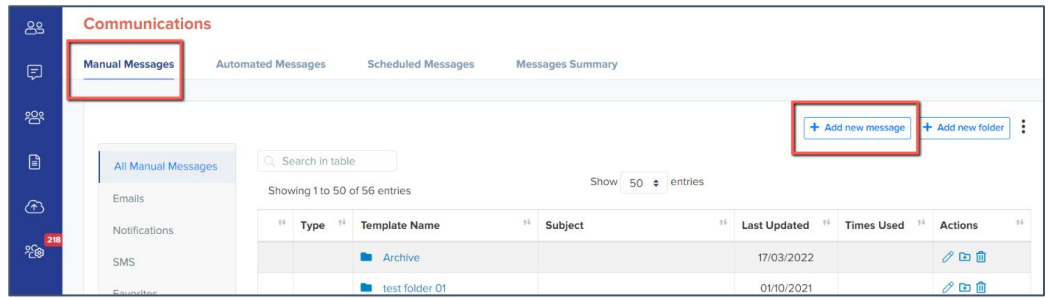
✉	Parent Confirmation Instructions	Welcome to [SCHOOL_NAME]'s Online Application Form
✉	Notify Parent Application Complete	{{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} has completed their application to [SCHOOL_NAME]

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

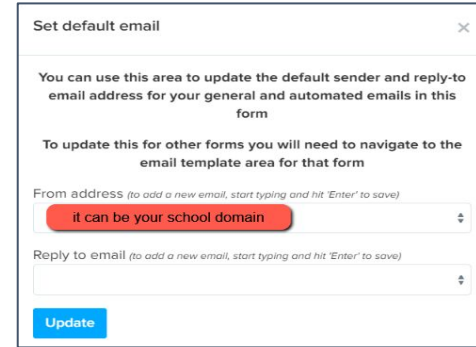
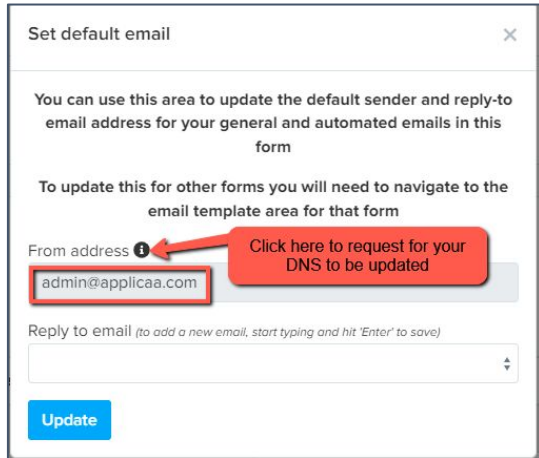
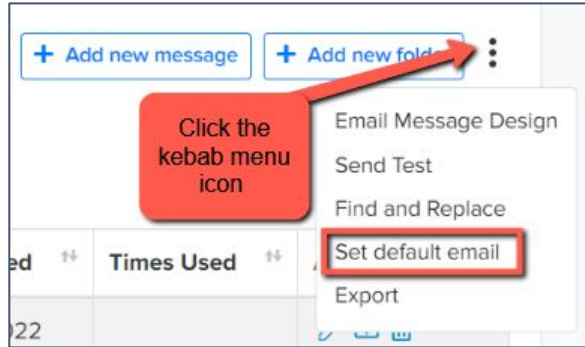
Once a form is completed and submitted, this email is triggered.

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.

By using personalisation tokens, you can mail merge personalised content to your recipients.

Mail Merge Field

Contact First Name

Insert Field

Select your token and then insert it, followed by a space

Paragraph **B** U *I* [List icons] [Link icon] [Image icon] [Table icon] [Undo] [Redo] [Search] [Video] [Source] [Link]

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

On the day of the test, please ensure `{{STUDENT_FIRST_NAME}}` `{{STUDENT_LAST_NAME}}` arrives at least 15 minutes prior to the scheduled start time.

Attachments (File from computer will be uploaded and selected if exist)









+ Add Attachment

← Back

Save

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.

Step Name	Internal	External	Visible on Student Profile ⓘ	Actions
Step 1: Your Child's Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Step 2: Parent(s)/Carer(s) Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 3: Child's Welfare and Support Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 4: Child's Current School	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 

Click on the name of a step to open it

Choose which steps to have on or off, the only one you can't turn off is "Your Child's Details" - it is greyed out so it can't be disabled

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?

Your child's details. 

Question

Please upload a recent passport-style photograph of the child

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

Home / Settings / Student Application Form / Application Form / Your Child's Details

← Your Child's Details

Customise Sections Preview Application Forms

Application Form Notice 

Sort Questions + New Question

Question	MIS export	Internal	External	Visible on Profile	Actions
Notice	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/>	 

Application Form Notice

- Your child's details.
- Your child's permanent address
- Child's Contact Information

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

Customise Application Journey

Step View Phase View

All Application Phases

Phases	Category	Visible to Students	Visible to staff on Student Profile	Filter
2. Application Form	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3. Test Results	Form Questions	<input type="checkbox"/>	<input type="checkbox"/>	

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



What type of user can apply i

Students

Parents

Parents & Students

Prevent parents from adding new applications i

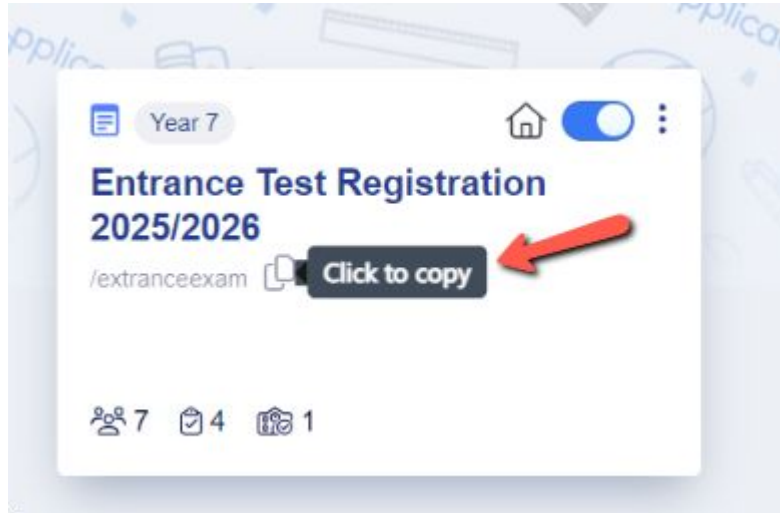


Stop new students from applying i



Publish Your Link

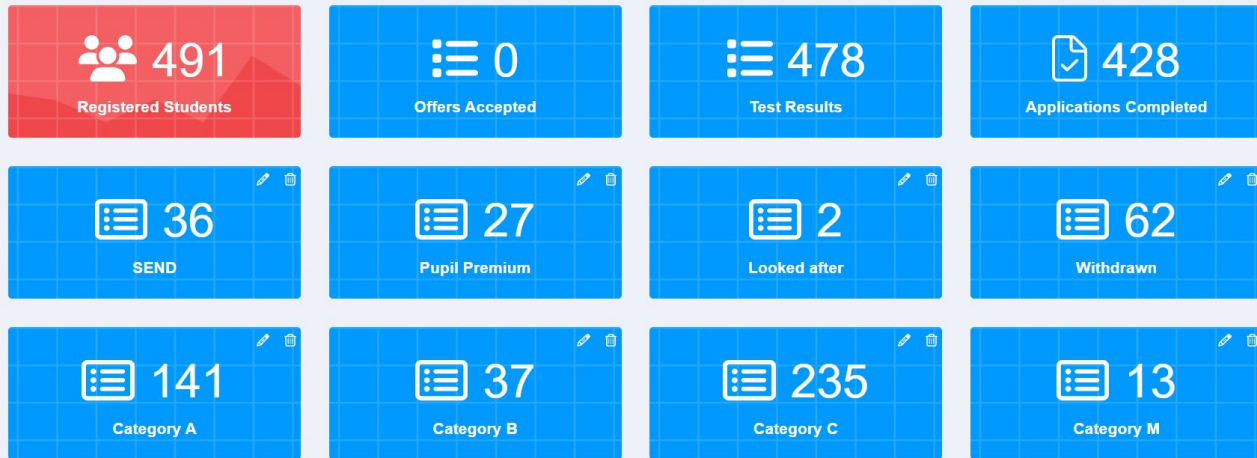
When you're ready to launch, copy your link from the forms area and paste it onto your school or consortium website.



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.

The dashboard features two tiles at the top: a red tile for 'Registered Students' with a count of 7, and a green tile for 'Applications Completed' with a count of 4. Below these is a section titled 'Application Form Statuses' with a grid of counts: 3 Incomplete (highlighted with a red box), 0 Awaiting Reference, 4 Completed, 0 Declined, 0 Withdrawn, 0 Deadline Missed, and 0 Waiting List.

The interface includes a toolbar with buttons such as 'Change Application Status', 'Make Offer', 'Change Offer Status', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group', 'Remove from group', 'Communications', and 'Reset Passw'. Below the toolbar, a table displays student information. The first two rows are selected, indicated by blue checkboxes in the first column. A dropdown menu is open under the 'Communications' button, with 'Send Email' highlighted.

ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo
21	JQNXX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail

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.

Set Up Advanced Settings Email Template

Communication Type *
Email

Subject Header *
Please complete admission form.

Sender Email *
admin@appliaca.com

Template Name *
Incomplete

Target Audience *
Parent

Reply-To Email (to add a new email, start typing and hit 'Enter' to save) *
admin@appliaca.com

Template Description

Set up how would like to send this email here

When applicant does what? *
Automatically when an applicant does something

When applicant does what? *
Has been incomplete for certain amount of time

Select phase applied to *
Application Form

Send after 5 day(s) 0 hour(s) 0 minute(s)

Repeat email after every 5 day(s) until they submit

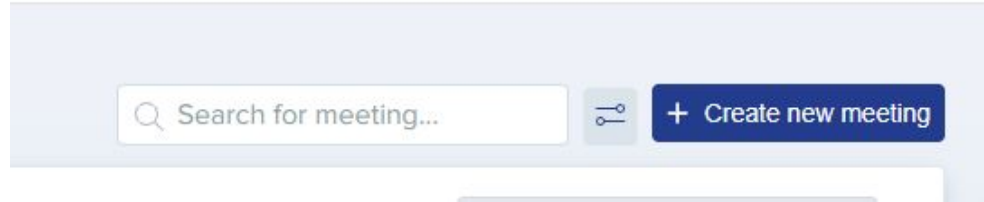
This may say "admission form" depending on your settings from earlier

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?

Set Up

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

Exam test day


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

Entrance test for 2025 intake

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.

Configure the corresponding email templates:













Invitation Email 

Email Subject Header

Invitation to interview at {{SCHOOL_NAME}}

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph            

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

This email is in relation to the entrance test application for {{STUDENT_FIRST_NAME}}
{{STUDENT_LAST_NAME}} at {{SCHOOL_NAME}}.

Your child's test details are as follows:

Meeting: {{INTERVIEW_TITLE}}

Time: {{START_TIME}}


Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Please click on the link below to log on and respond to this invitation.

{{LINK}}













Confirmation Email 

Email Subject Header

{{SCHOOL_NAME}} Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph            

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

This email is in relation the application for {{STUDENT_FIRST_NAME}}
{{STUDENT_LAST_NAME}},

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Meeting: {{INTERVIEW_TITLE}}

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Kind regards,

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


invite


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


Type	Template Name	Subject	Send from	Send to
	<input type="text" value="Search Template I"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>
✉	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

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)

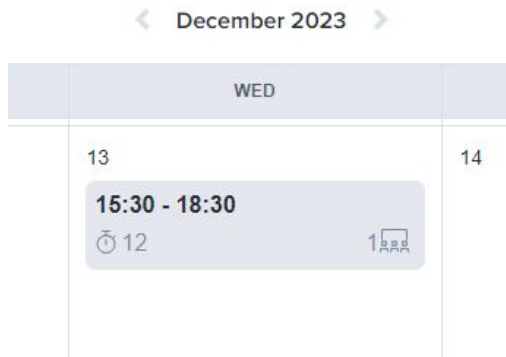
Add the date of the session, and set the session start and end times, and how many students can be accommodated in that session.

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

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	<input type="text"/>	<input type="text"/>	1
<input type="checkbox"/>	Wednesday, 13/12/2023	15:45	16:00	<input type="text"/>	<input type="text"/>	1



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.

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

Group

Filter

Add to meeting

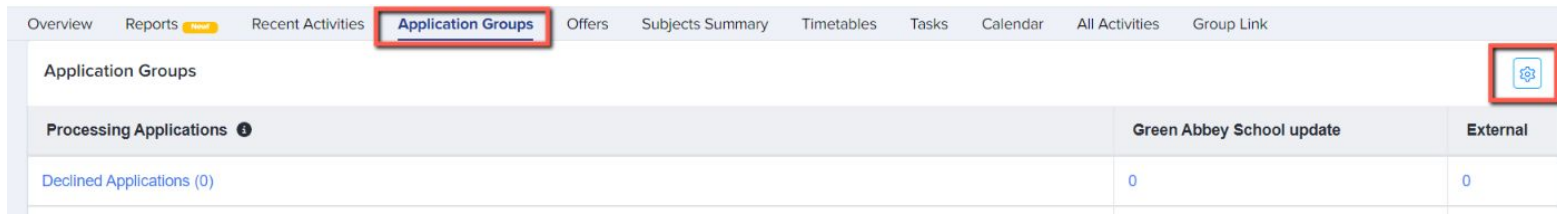
Depending on your setup, you will either be prompted to **invite students** (if they are choosing their own slots) or **allocate students and then invite them** (if you are assigning appointments for them).

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

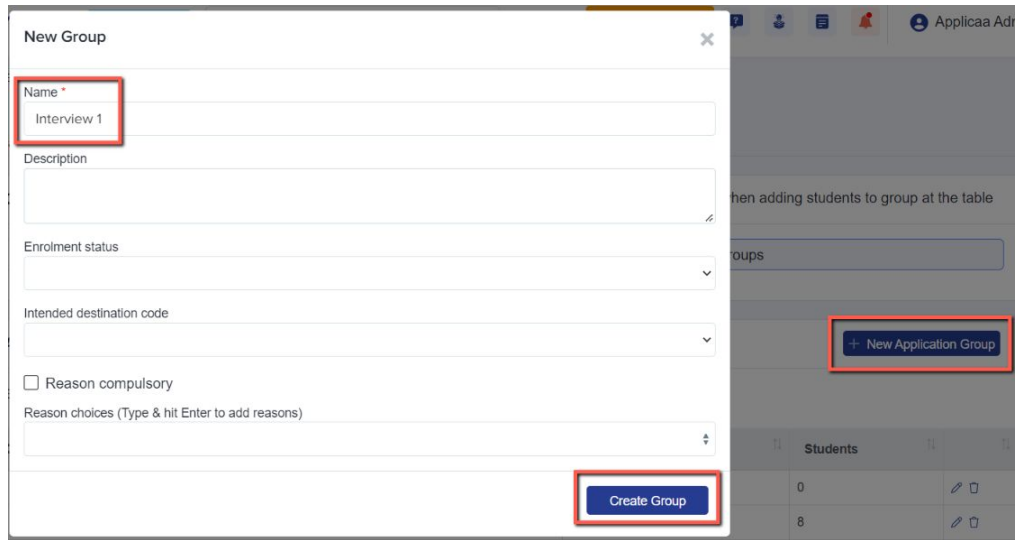
Adding students to application groups

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:



Application Groups		
Processing Applications ⓘ	Green Abbey School update	External
Declined Applications (0)	0	0



New Group

Name *
Interview 1

Description

Enrolment status

Intended destination code

Reason compulsory

Reason choices (Type & hit Enter to add reasons)

Create Group

+ New Application Group

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:

The screenshot shows the 'Registered Students' interface. At the top, there are several action buttons: 'Change Application Status', 'Make Offer', 'Change Offer Status', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group' (highlighted with a red box), and 'Remove from group'. Below these are buttons for 'Communications', 'Reset Password', 'Change Colour', 'Bulk Update', 'Add to interview', 'Export To PDF', and 'Confirm Account'. A 'Switch to Old Table' button is in the top right. A filter dropdown is set to 'Select a filter' and a view dropdown is set to 'Select a view'. Below the filters, it says 'Showing 1 to 7 of 7 entries 7 rows selected' and 'Show 10 entries'. The table below has columns for ID, Student Code, First Name, Last Name, and Birthday. The first four rows are highlighted in blue, and their checkboxes are checked. A red box highlights the checkboxes for the first four rows. A dropdown menu is open on the right, showing a list of groups: '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', and 'test25'.

<input checked="" type="checkbox"/>	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 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.

Change Colour Bulk Update Add to meeting Export To PDF

Filter Applications%20c... x 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

- Internal Students: 161
- Registered Students: 208
- Awaiting Reference: 67
- Medical: 26

Application Form Statuses

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

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.

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](#)


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 entries

<input type="checkbox"/>	Meeting Date	Time	Student Code	Email/Username	School	Room	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status
<input type="checkbox"/>	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
<input type="checkbox"/>	03/11/2023	12:00 - 12:30									



Tracking responses to invitations



Jason Bourne Student Code: U-8E2D

School Message

Welcome to the application portal for Test Grammar School.

EXAM TEST DAY

Entrance test for 2025 intake

14/09/2024 09:00 - 12:00

Main Hall

Decline

Accept

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.

Exam test day

All 330

Allocated 5

Invited 5

Not Confirmed 5

Confirmed 0

Completed 0

Incomplete 0

Did not attend 0

Cancelled 0

Declined 0

Monday 17th, October 2022

10:00 - 11:00

Tutor Demo

3 / 1

School hall

Saturday 14th, September 2024

09:00 - 12:00



2 / 1

Main Hall

Registering Attendance





You can access an 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

Buttons: Make Offer, Change Offer Status, Communications, Reset meeting status, Add to group, Remove from group, Remove students, Configure Meetings Settings, Add students

Search: 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+16684@example.com	Greenford High	Room B	Pending	Pending	   

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

← Saturday, 14/09/2024 | 09:00 - 12:00

Jason Bourne

Buttons: Resend invitation, Meeting cancelled, Mark as No-show, Pending

Buttons: Manage pins, View full application

Application Form

Your Child's Details	Child's Current School
Application Form Notice THIS APPLICATION FORM MUST BE FULLY	Home Schooled or at School Is your child at school or home schooled? At School

Meeting Questions

No question yet.

Buttons: Mark as incomplete, Mark as completed

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).

The screenshot displays the 'Phase: Application Form' settings page. At the top right, there are buttons for 'Sort Steps' and '+ New Step', with a red arrow pointing to the latter. Below this is a table with columns for 'Step Name', 'Internal', 'External', 'Visible on Student Profile', and 'Actions'. The table contains one row: 'Step 1: Your Child's Details' with all three toggle switches turned on and an edit/delete icon in the Actions column.

Below the table is a 'New Step' modal form with the following fields:

- Name ***: Text input containing 'Test Information'. A note below reads 'Step name should be short'.
- Description**: Text area.
- Phase**: Dropdown menu with 'Application Form' selected.
- Template**: Dropdown menu with 'Blank' selected.

Step Name	Internal	External	Visible on Student Profile	Actions
Step 1: Your Child's Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 

← Test Information

Customise Sections

Preview Application Forms

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”.

← Test Information

Customise Sections

Preview Application Forms

Candidate Information

Sort Questions

+ New Question

Question

MIS export

Internal

External

Visible on Profile

Actions

New Property

Property group *

Additional Questions

Field Type

Single-line Text

Text format

none

Title *

Candidate Seat Number

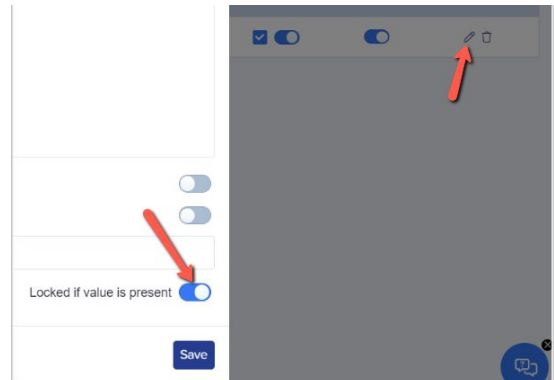
Unique Code *

candidate_seat_number

Character limit/Maximum number

0

Set 0 to ignore this limitation



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.

Registered Students

Filter

View

Showing 1 to 10 of 478 entries

Student Code
U-F98B
U-211E
U-20A8

Once you have clicked onto a group or dashboard card, you will see the function to export

[↔ Switch to Old Table](#)

[↓ Export](#)

[🔗 Share](#)

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

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

1	Student Code	First Name	Last Name	Birthday	Gender	Candidate Seat Number
2	U-4562	Applicaad	Demo	15/03/2011	Female	A1
3	U-8E2D	Jason	Bourne	31/10/2016	Male	A2
4	U-D1E0	A	B	13/11/2012	Female	A3
5	4VH6	Lizzie	Windsor	10/10/2010	Female	A4
5						

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

Map your import as follows:

Do you want to create Parent profile from Guardian/Contact?

You are importing Internal/External

Select a column to match student information at Admissions+

From uploaded file From Admissions+

MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION	ADMISSIONS+ PROPERTY
<input checked="" type="checkbox"/>	Student Code	U-4562 U-8E2D	<input type="text" value="Select a value"/>
<input checked="" type="checkbox"/>	First Name	Applicaad Jason	<input type="text" value="Select a value"/>
<input checked="" type="checkbox"/>	Last Name	Demo Bourne	<input type="text" value="Select a value"/>
<input checked="" type="checkbox"/>	Birthday	15/03/2011 31/10/2016	<input type="text" value="Select a value"/>
<input checked="" type="checkbox"/>	Gender	Female Male	<input type="text" value="Select a value"/>
<input checked="" type="checkbox"/>	Candidate Seat Number	A1 A2	<input type="text" value="Candidate Seat Number"/>

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 screenshot shows the 'Imports' section of a system interface. At the top, there are tabs for 'Imports', 'Exports', and 'Uploaded Files'. Below the tabs, there are several configuration options:

- 'Do you want to create Parent profile from Guardian/Contact?' with a dropdown set to 'No'.
- 'You are importing Internal/External' with a dropdown set to 'Unchanged -> if the stude...'
- 'Select a column to match student information at Admissions+' with two dropdowns, both set to 'Student Code'.

Below these options is a table with four columns: 'MATCHED', 'COLUMN HEADER FROM FILE', 'PREVIEW INFORMATION', and 'ADMISSIONS+ PROPERTY'. The table contains four rows of data:

MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION	ADMISSIONS+ PROPERTY
✓	Forename	Ada Antony	Forename
✓	Surname	Aisel Wambua	Surname
✓	Student Code	U167 U168	Select a value
✓	Test Result	21 79	UGS Score

Yellow callouts provide additional context:

- A callout box on the right says 'These are the correct values to use in these fields' with arrows pointing to the 'No', 'Unchanged...', and 'Student Code' dropdowns.
- A callout box at the bottom right says 'The only field(s) you need to map here are for the new data you are importing - results' with an arrow pointing to the 'Test Result' column header and another arrow pointing to the 'UGS Score' dropdown.

The Test Results Phase

Phase: Test Results

Sort Steps

+ New Step

Step Name

Internal

External

Visible on Student Profile

Actions

Step 1: Test Scores



Edit Field: UGS Score



This question represent the property `ugs_score`

Title / Question *

UGS Score

Description

open in a new tab

Paragraph

B U *I* [List icons] [Link icon] [Image icon] [Color icon] [Font size icon] [Align icon] [Indent icon]

Activate Word Limit



Activate Character Limit



500

Parent can view but cannot amend this data

Locked if value is present

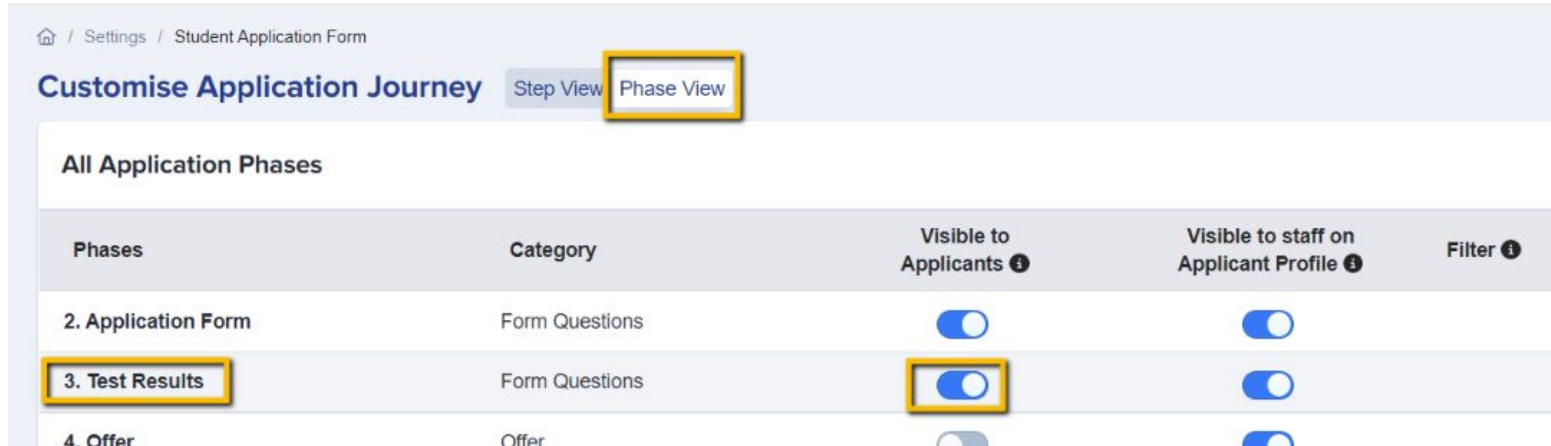


Save

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.



The screenshot shows the 'Customise Application Journey' settings page. The 'Phase View' tab is selected and highlighted with a yellow box. Below the tabs, there is a table titled 'All Application Phases' with columns for Phases, Category, Visible to Applicants, Visible to staff on Applicant Profile, and Filter. The '3. Test Results' row is highlighted with a yellow box, and its 'Visible to Applicants' toggle is also highlighted with a yellow box.

Phases	Category	Visible to Applicants ⓘ	Visible to staff on Applicant Profile ⓘ	Filter ⓘ
2. Application Form	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3. Test Results	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
4. Offer	Offer	<input type="checkbox"/>	<input type="checkbox"/>	

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

The screenshot shows the 'Communications' interface with the 'Manual Messages' tab selected. A search bar is present with the text 'Search in table'. Below the search bar, it says 'Showing 0 to 0 of 0 entries'. A table with columns 'Type', 'Template Name', 'Subject', 'Last Updated', 'Times Used', and 'Actions' is visible. On the right side, there are buttons for '+ Add new message' and '+ Add new folder'. On the left side, there is a sidebar with 'All Manual Messages', 'Emails', and 'Notifications'.

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.

The screenshot shows the 'Mail Merge Field' selection interface. A dropdown menu is open showing 'AGSB Score'. A blue 'Insert Field' button is visible. Below the dropdown is a rich text editor with a toolbar containing various formatting options. The text in the editor is: 'Dear {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}}', 'Please see below for the results of the 11+ examination for {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}', and three lines of scores: '{{UGS_SCORE}}', '{{SGC_SCORE}}', and '{{AGSB_SCORE}}'. The mail merge fields are highlighted in yellow.

The background features a central light blue hexagon. To its top-left is a grey hexagon, and to its top-right is an orange parallelogram. Below the central hexagon are three smaller hexagons: a dark blue one on the left, a light blue one on the right, and a very small light blue one at the bottom center.

Do you have any questions?



THANK YOU