

Setting up your new cycle

Reception



The Timeline

Autumn:

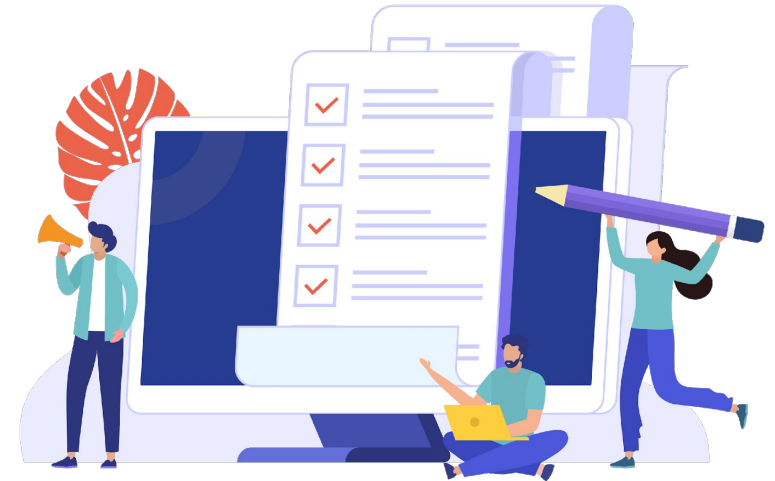
- ❖ Parents apply via Local Authority

Spring:

- ❖ Prepare your Admissions+ form
- ❖ Receive your list from the Local Authority
- ❖ Import your list straight into Admissions+
- ❖ Send welcome emails to parents
- ❖ Parents complete your form
- ❖ Import your data into your MIS

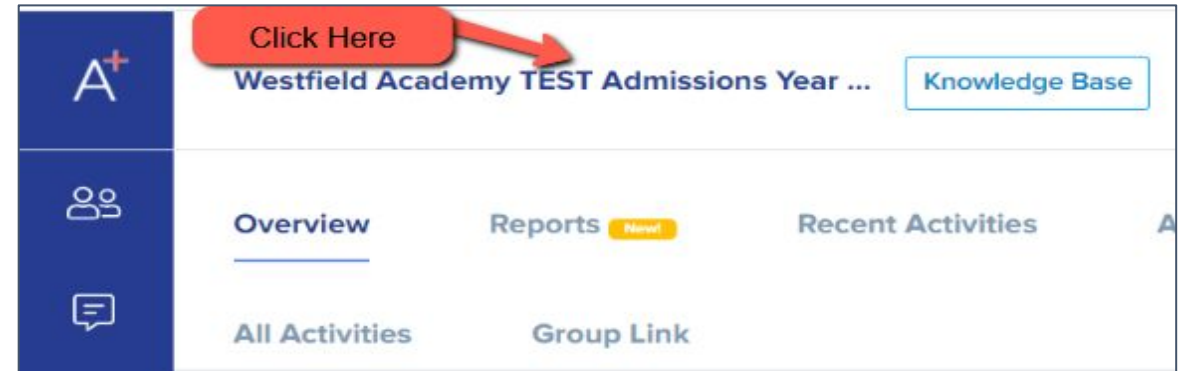
Summer:

- ❖ Allocate students to registration/form groups using the Sorting Hat

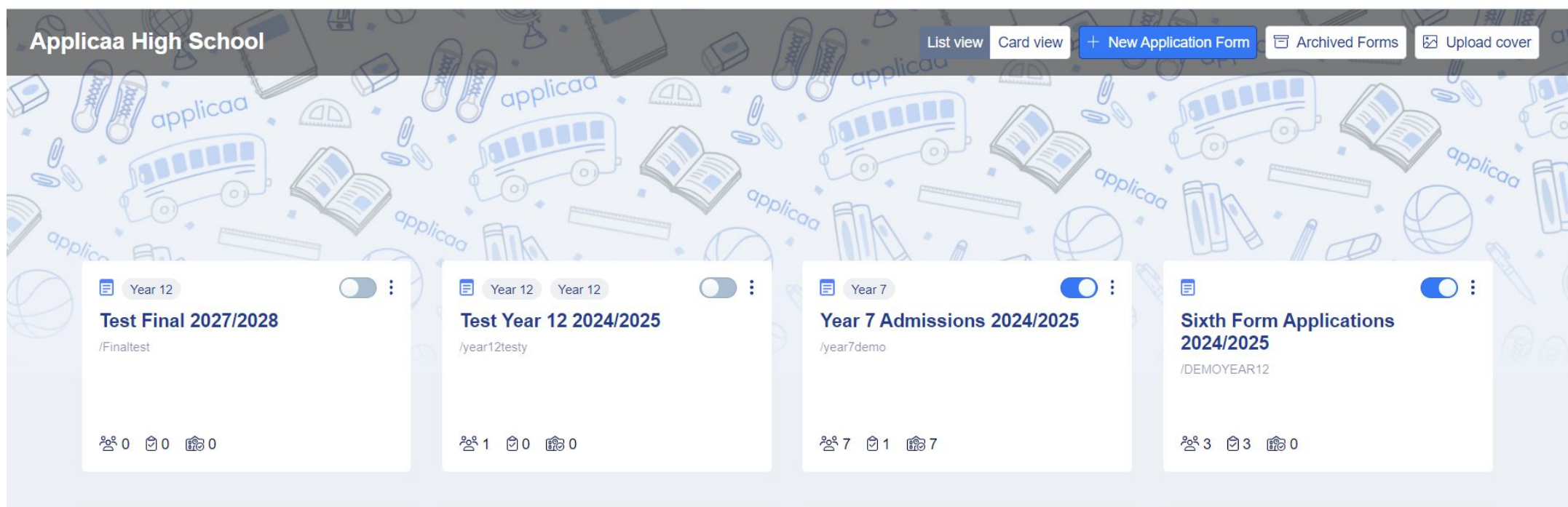


1 How to create your new form

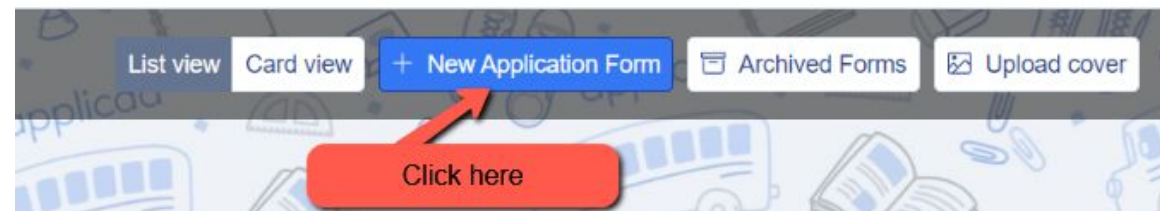
Click on the blue wording in the upper left of your dashboard and then click “forms area/multiple forms”



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 intake



New Application Form [Close]

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*

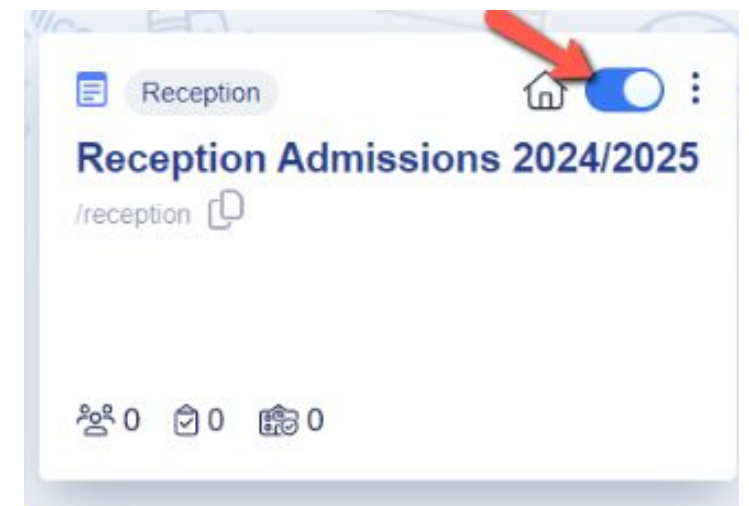
Customise the ending of the URL for this form e.g. demo.applicaa.com/Year12 (to add a new URL, start typing and hit enter) Years of Form*

Send different emails linked to Expected Year Group

Create Application Form

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!

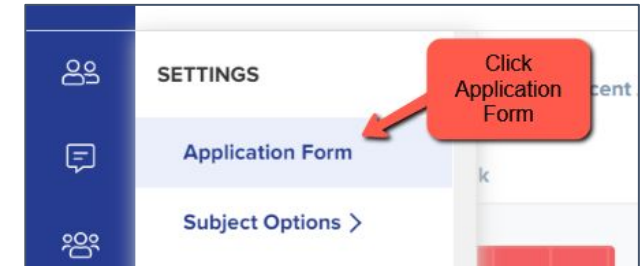
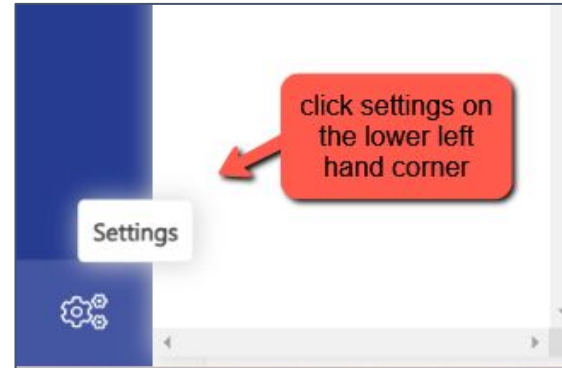
Turn the toggle switch on to make it active - it needs to be active to enable importing/exporting with your MIS







2 How to close your old form

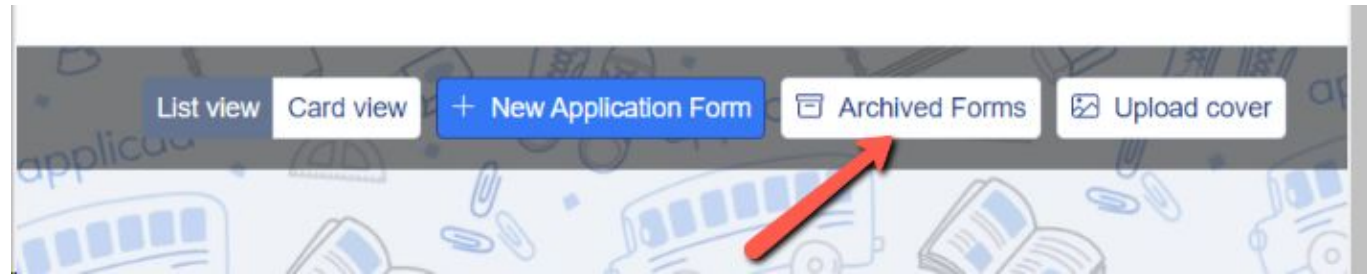
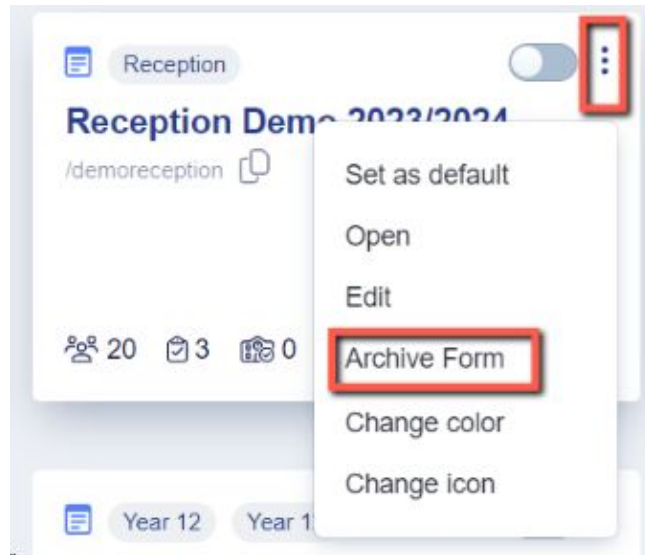
Now that the 2023 cycle has finished, you don't want parents completing anything on that form, as that data is now in your MIS and managed there.

In your 2023 form:
Navigate to settings > application form > phase view and turn on "disable submissions"



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

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



3

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 Reception, this should be set to “students and parents must be imported by staff”.

You can also update any images here as needed

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

Show New Application block

New application title

Welcome

Description

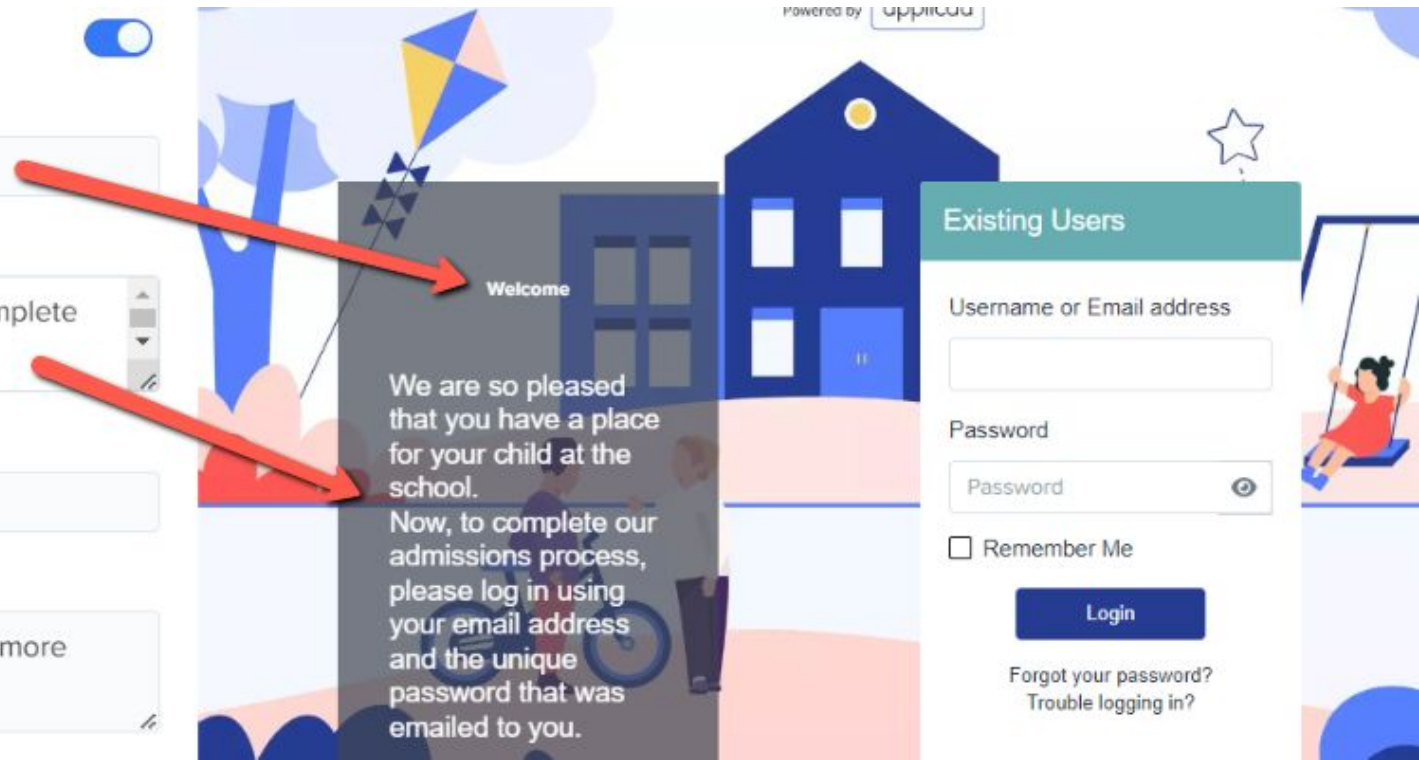
We are so pleased that you have a place for your child at the school. Now, to complete our admissions process, please log in using your email address and the unique

Button text for go to event page

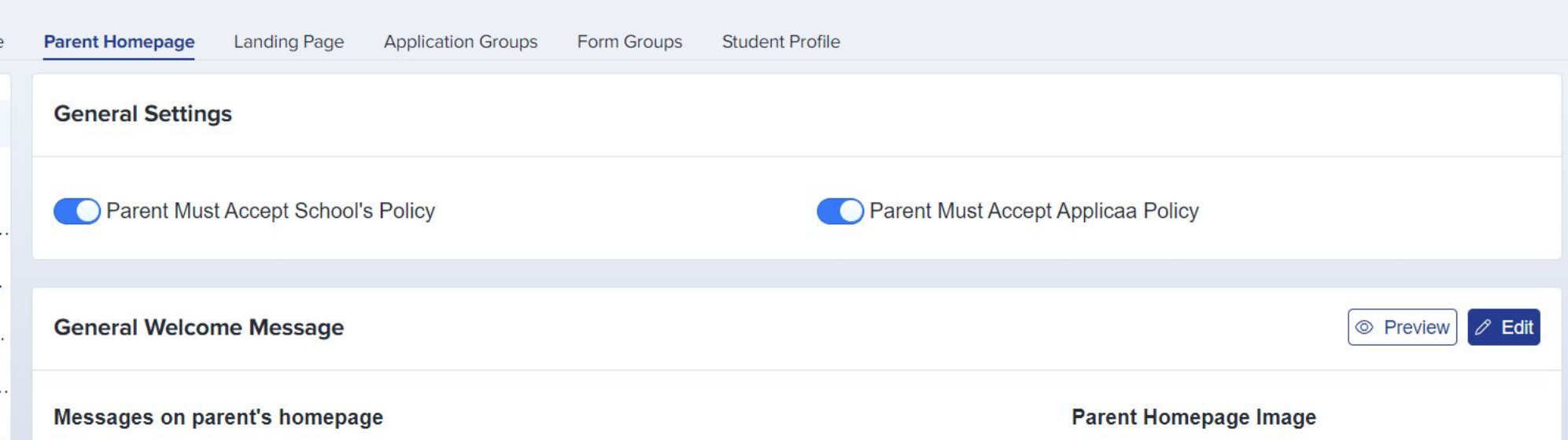
Register For Events

Tooltip text when disabling new application button

Starting new applications is currently 'deactivated'. Please contact the school for more information.



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, Reception-specific welcome message if desired.



You could consider changing your configuration to suit your intake:

Children Status Config

Button text for new application button	Start New Application	*Not in use for Year 7 & Reception intakes*
Button text for continue application button	Continue Application	Perhaps reword: Continue Admission Form

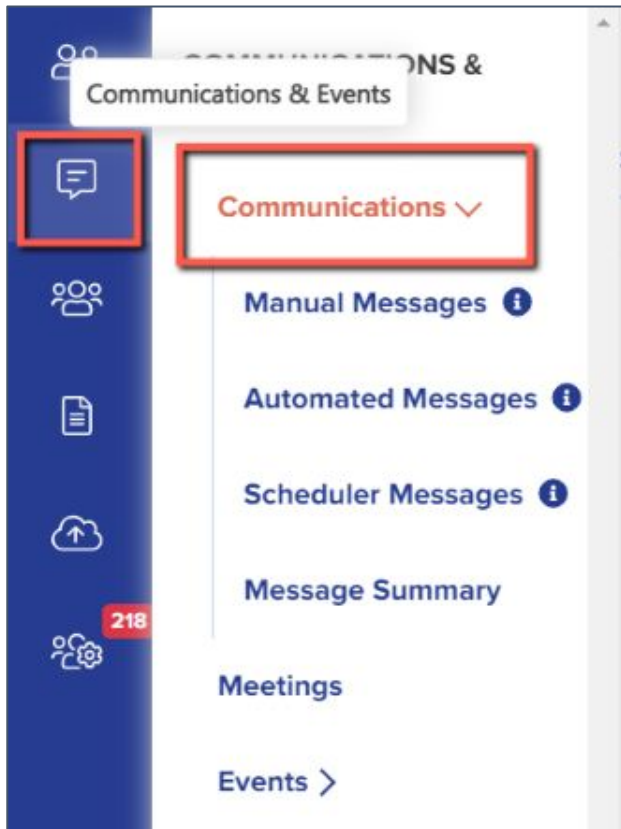
Also turn off:

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












4

Checking your email templates

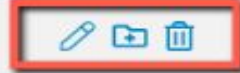
The email templates area is really useful and can automate a lot of your processes!



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

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 - if your intake is for Reception, ensure there is no "Post 16" wording in your templates

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
	<input type="text" value="Search Template I"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text" value="Parent"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

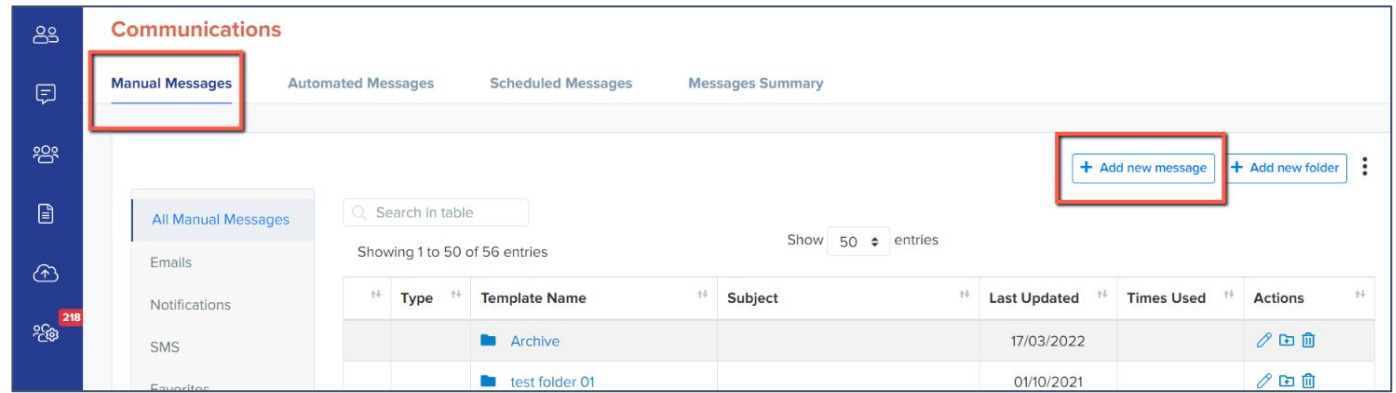
✉	Parent Welcome	Welcome to Applicaa Demo
---	----------------	--------------------------

This email contains their system-generated password and will be your first correspondence with them

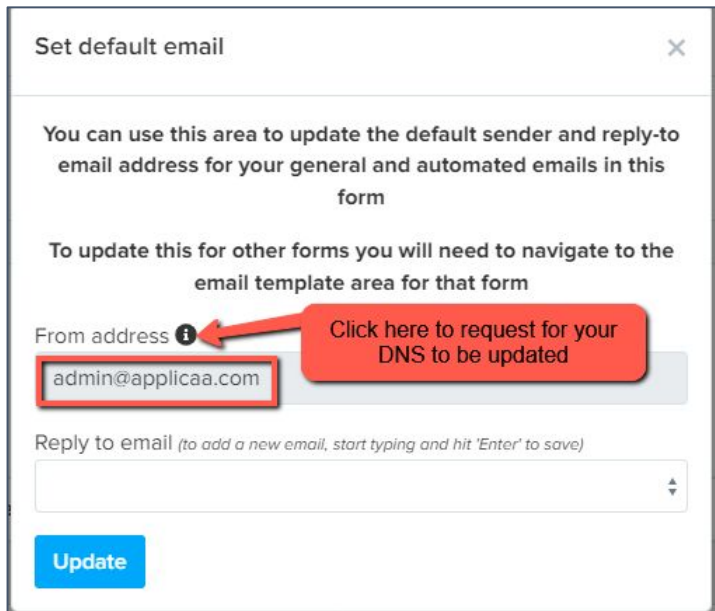
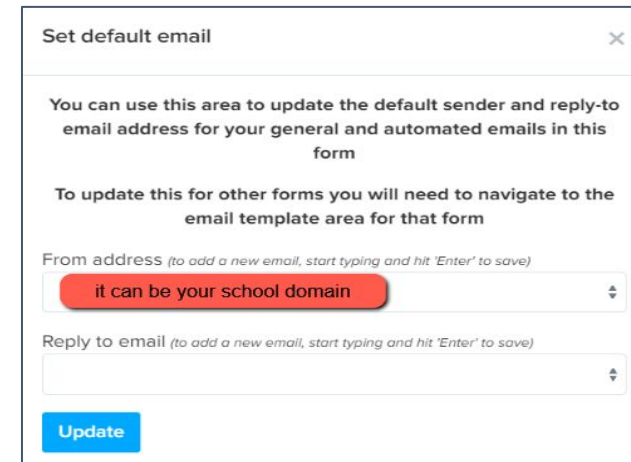
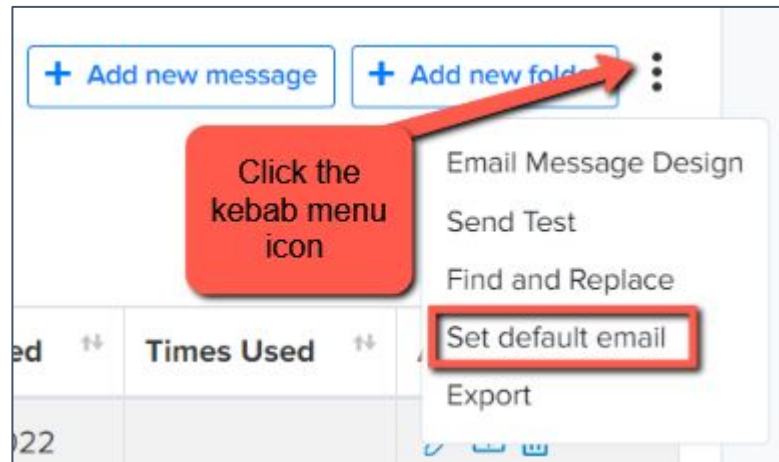
✉	Notify Parent Application Complete	{{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} has completed their application to Green Abbey School
---	------------------------------------	---

This email notifies the parent they have successfully submitted the form - by default, it is configured for Post 16 so consider changing the wording to "we have received the completed admissions form 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!

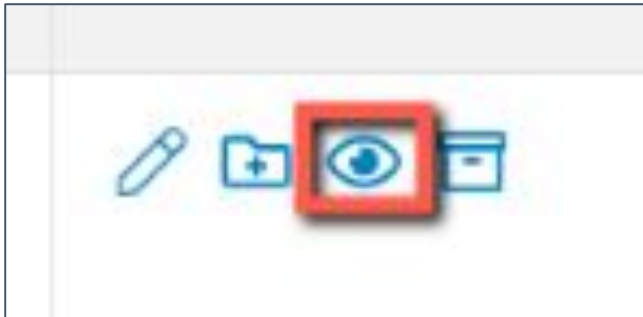


Check who the emails are being sent from and who the replies will come to - set your defaults here:



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!

You can also preview the email template if you want to see how it looks



Preview Communication

Dear {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}

Below is your login details for {{SCHOOL_NAME}}
Email: {{STUDENT_EMAIL}}
Password: {{PASSWORD}}


[[LINK]]

Merged Fields/
Token that
system
automatically
populates

[Log in to your account](#) · [Visit School Website](#)

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Registered Address:
23 Abdale Road
Shepherd's Bush
London W12 7ER

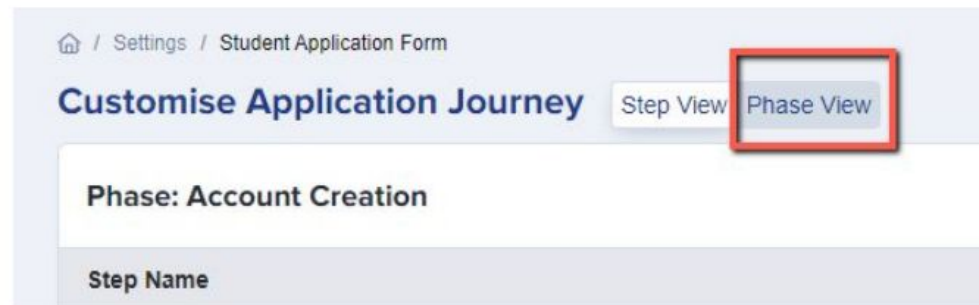
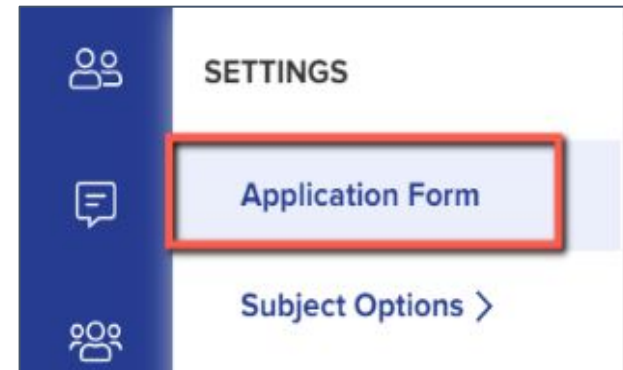
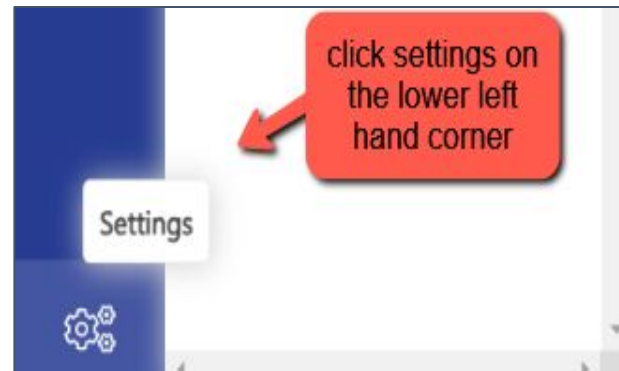
Powered by 

Close

5

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:

Customise Application Journey Step View Phase View Global Form Settings + Create Test Application

All Application Phases Sort Phases + New Phase

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

Edit Step: Application Form

Name

Description

Internal Applicants

Lock form after submission

Disable submissions

External Applicants

Lock form after submission

Disable submissions

Stand alone ⓘ

Trigger by condition

Phase: Admission Form

Step Name

Step 1: Child's Basic Details

Step 2: Parent/Carer
Please list parent or carers in order of priority, starting with the contact that should be contacted first in the emergency

Within your application form, make any changes to questions/fields - have you got new UDFs 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 open whichever step you wish to add questions to. Click "+ New" and you will see your UDFs on the left of the window

Here is a link to our [form customisation guide](#)

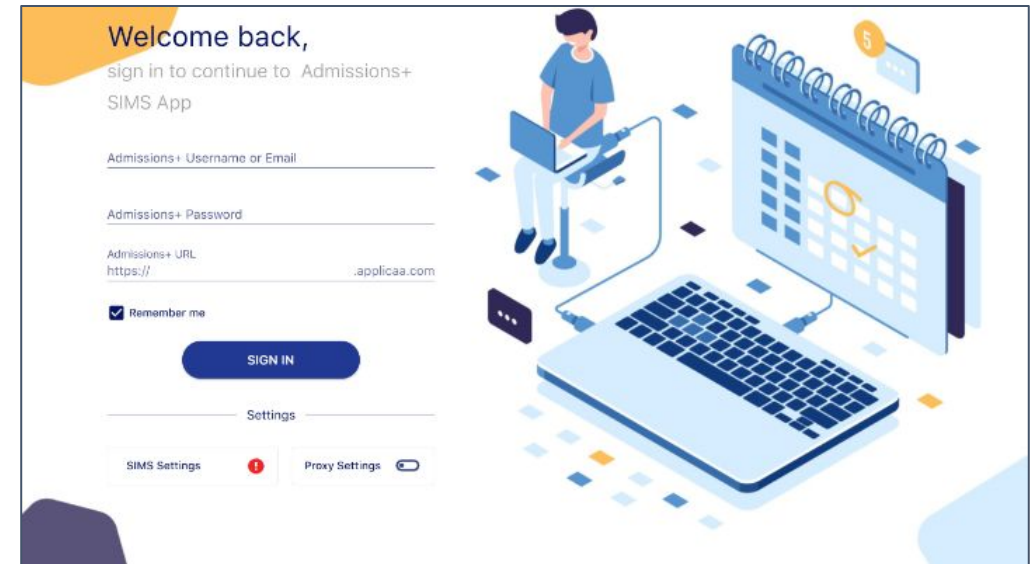
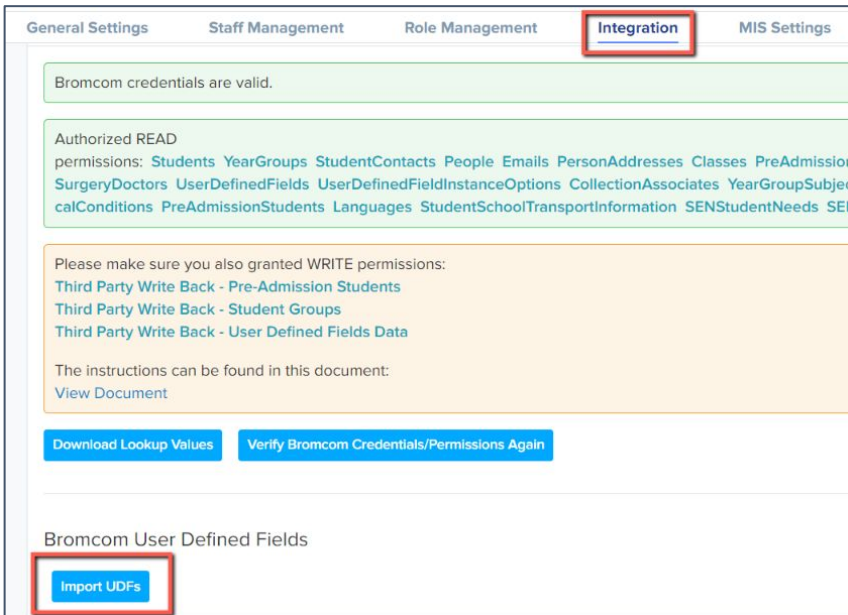
The screenshot displays the 'Existing Properties' and 'New Properties' sections of the application form customisation interface. The 'Existing Properties' section on the left contains a search bar and a list of categories, with 'CloudSchool User Defined Fields' and 'Sims User Defined Fields' highlighted with red boxes. A red callout box points to the search bar with the text 'Search to see if it already exists in your system'. The 'New Properties' section on the right includes a pink warning box: 'Please note you will NOT be able to transfer the answers for custom questions to SIMS. If you need help, please contact your CSM or 0208 762 0882'. Below this, there are sections for 'Text Input', 'Choosing Options', 'Value', and 'File Upload', with a 'Paragraph' block selected. A '+ New' button is visible at the bottom right. A red callout box points to this button with the text 'Click the + New button on the section you want to add your question to'. The background shows a table with columns for 'Internal', 'External', 'Visible on Student Profile', and 'Actions', with various toggle switches and edit/delete icons.

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:

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



SIMS In Touch:

This field is NOT active by default on Admissions+

If you use In Touch and would like to activate that field so it writes back to SIMS:

- go to the Parent/Carer step of your application form
- Click + New Question
- Click parent/carers contact details and select the In Touch question to add it to your form

Add New Field

Existing Properties Show long text

Search existing fields

Addresses >

Parent/Carer contact details ▾

- Please specify your relationship (...)
- Phone Work
- Should this contact be provided w...
- Translator required
- After the child starts school, this c...**
- Contact first language
- Priority
- Relationship
- Work Phone Number
- Should this contact be provided w...
- Contact priority source
- Place of work
- Job title
- National Insurance number
- Does this contact have legal pare...
- Authorized to Collect student fro...

Parent/Carer address >

Telephones and Email Addresses >

Additional Contact Address >

Properties | Calculated Properties | Property Groups

New Property


Showing 1 to 1 of 1 entries (filtered from 322 total entries) | Show 50 entries

Category	Apply For	Name	Code	MIS	Lookups imported?	Used in number of fields	Actions
Parent/Carer contact details	Guardian, OtherGuardian, Parent	After the child starts school, this contact should receive school communications via our parent mail system ie. emails and SMS text messages (for example absence messages, trip notifications, general information emails etc)	in_touch_communication	SIMS	Yes	0	


Check in settings > properties > properties to see what the name of your In Touch field is, and whether it is already active in your form


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

Agreement

Policies 

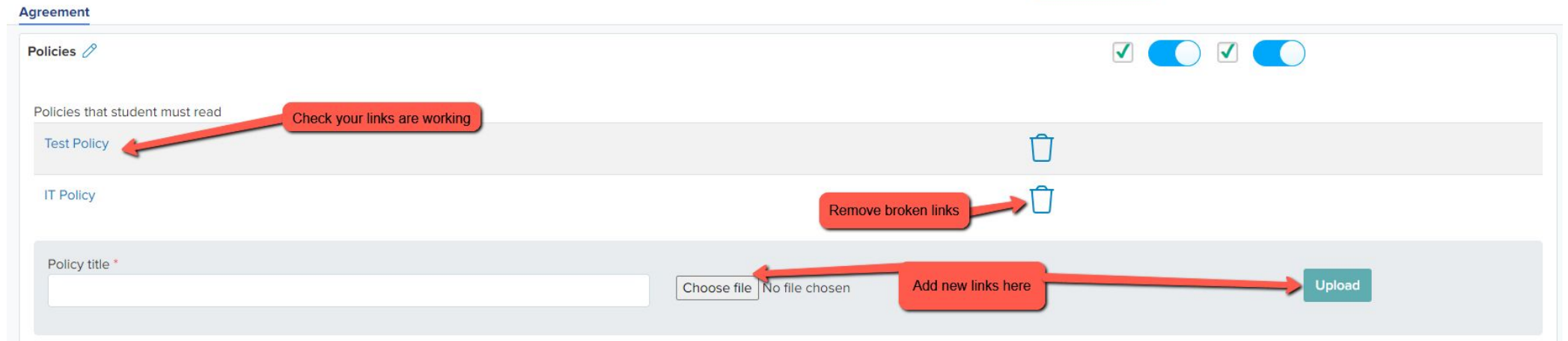
Policies that student must read

Test Policy  **Check your links are working**

IT Policy  **Remove broken links**

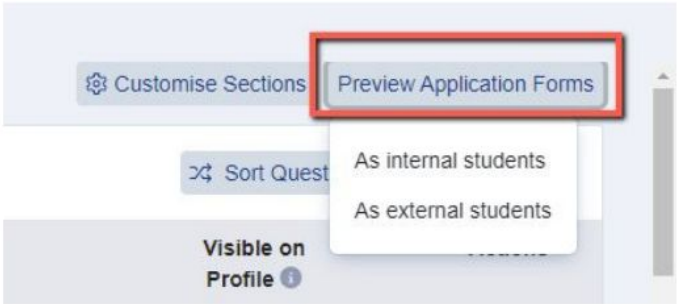
Policy title *

No file chosen



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

Note: If you also have a nursery, any students progressing to reception from your nursery setting will be classed as internal students.



Preview

! Step 1 ! Step 2 ! Step 3 ! Step 4 ! Step 5 ! Step 6 ! Step 7 ! Step 8

Student Basic Details Parent/Carer Details Support Information Agreement Religion Additional Information Education Courses

Student Basic Details

Please upload a recent passport-style photograph of yourself

Choose File No file chosen

Remove?

Legal First Name* Test Internal FN

Legal Last Name* Test External FN

(Preferred) First Name*

Middle Name(s)*

Family Surname*

Gender* Male

Date of Birth* 12/12/2004

Year group applied for*

Close Next

Configure your **address settings** so they migrate correctly into your MIS as per your school's setup

Address Block Configuration ⓘ

Apply to Existing Addresses Report

Address 1 <line 1>

Address 2 <line 2>

Address 3 <line 3>

Town/City <post_town>

○ ALL CAPS ⓘ ● Normal Case

County/State <postalcounty>

Country <country>

Postcode <postcode>

Enter a postcode to test:

2 Westfield Road, Wigginton, YORK, YO32

Test

Preview

Address 1 2 Westfield Road

Address 2 Wigginton

Address 3

Town/City York

County/State North Yorkshire

Country United Kingdom

Postcode YO32 2JF

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!

6 **Setting up open evenings and events**

We have updated the Events area significantly and the new functionality is now available.

See our updated guides [here](#)

Key features include

Set sessions within Events

Cover multiple times and days

View registrants

View total attendees

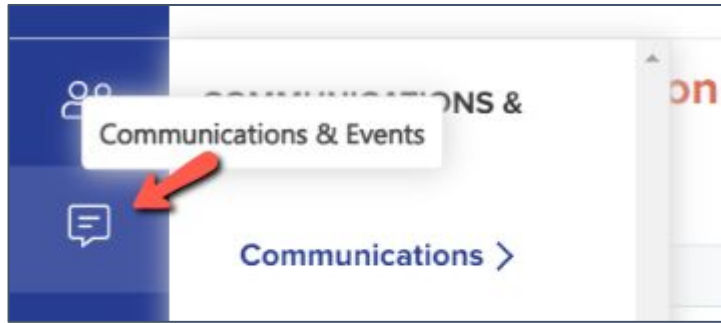
Track which events are published/ unpublished

Customisable question on registration

Filter based on question responses

Email templates & automated emails

Accessing the Events module



Navigate to communications and events > events

Click to create a new event and set your parameters: are you ready to publish the event and share the URL?

Events

Events Event Guests Event forms

Actions	Date	Event	URL	Location	Visibility	Limit	Registrants	Invitees	Attended
 	> Friday 22 September, 2023 09:00 - 17:00	Parent's Evening test	Public URL  https://demo.applicaa.com/events/181		Unpublished Test Year 12	Unlimited	2	4	1

Show 10 entries

Displaying 1 entries

< Prev 1 Next >

You can show events on your landing page, on student and parent homepages and can also share the link on your website or email it to people directly!

Visibility

Which forms does this event relate to?

Apply for *

Test Year 12 (2024/2025) X

Message to show when the event is fully booked

This event is fully booked!

Display number of tickets remaining

Show the event form

[\(Click here to see example\)](#)

Login page for related forms

Student homepage

Parent's homepage for all parents

Parent's homepage based on application form

Parent's homepage based on the child's application form ⓘ

Parent's homepage based on enquiry child's suggested form ⓘ

Show popup for the event on

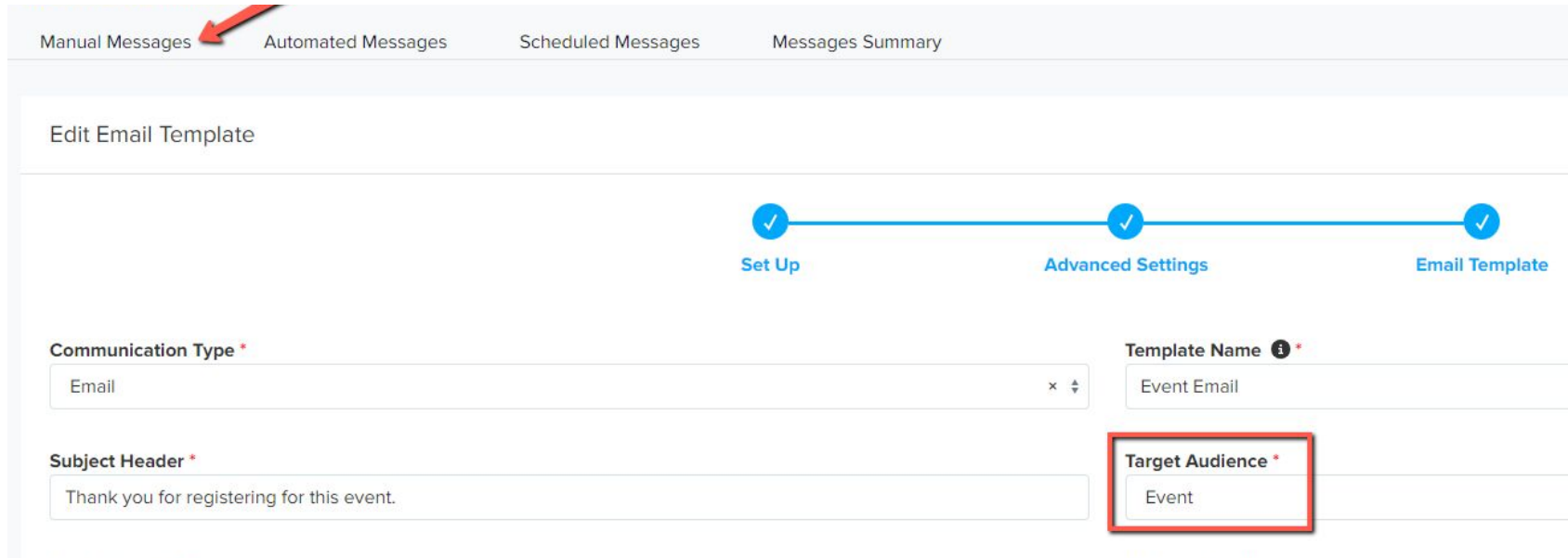
[\(Click here to see example\)](#)


Login page

Student homepage

Parent homepage

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 target audience is “Event”.



Manual Messages  Automated Messages Scheduled Messages Messages Summary

Edit Email Template

Set Up Advanced Settings Email Template

Communication Type *
Email

Template Name ⓘ *
Event Email

Subject Header *
Thank you for registering for this event.

Target Audience *
Event

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

Email & questions

Enable prospective pupil question when parent apply

Mandatory

Automated Email

Send automated event confirmation email to event registrants ⓘ

Thank you for your registration to our Open Evening

7 Importing your Local Authority file

There is a guide to importing parents into Admissions+ on our Knowledge Base and you will find it [here](#)

On the **imports** area of your platform, you will see a sample CSV file which you can download and populate with your LA data

You will then be able to import your data and this will create a system-generated password for each parent, which you will send to them in the Parent Welcome email

Parents of twins will have one login, and will have access to forms for both children

The screenshot shows the 'Imports' section of the Admissions+ platform. The top navigation bar has 'Imports' highlighted with a red box. Below the navigation, there is a progress bar with three steps: 'Select Type of Data', 'Select the Import Method', and 'Source of Data'. Underneath the progress bar, there are links to 'Admissions+ Import Guides'. A red callout box points to a file named 'import parent sample.csv' in a list of files.

Important: you MUST import your LA data straight into Admissions+. Please don't import the file into your MIS!

All fields on the sample CSV can be useful to import, but the ones shown in bold are most important.

A	B	C	D	E	F	G	H	I	J
Child First Name	Child Last Name	Child Birthday	Child Gender	Child Current School	Child Unique Pupil Number	First Name	Last Name	Relationship	Email
Child 1 First Name	Child 1 Last Name	31/12/2006	Female	Demo School	1234567890	Parent 1 First Name	Parent 1 Last Name	Father	father1@applicaa.com
Child 2 First Name	Child 2 Last Name	31/12/2006	Male	Demo School	12345678956	Parent 2 First Name	Parent 2 Last Name	Mother	mother1241@applicaa.com

Importing - step by step:

1. Click Data > Import > Start an import
2. Name your import, select “users” and “next”
3. Select “new users” (you will be prompted to select this) and “next”
4. Select parents (again, you will be prompted) and “next”
5. Choose “CSV”, then “next”, and then upload your file and click “next”
6. Complete the mapping step and click “next” to review the data and commence the import



**Use this selection for importing LA Offers for Year 7 Data Collection or Reception Admissions.*

Each column header below should be mapped to a property in Admission+. Some of these may be already been mapped based on their names. Anything that hasn't been mapped yet can be manually mapped to a property with the drop down menu. If you decide to not import a property just leave it unmapped and it will be ignored.

Data from your CSV needs to be mapped to the correct field on the right

Select type of children

Select application form

You are importing Internal/External

Tell the system where to put the data from each column of your CSV file

MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION	ADMISSIONS+ PROPERTY
✔	Child First Name	Child 1 First Name Child 2 First Name	<input type="text" value="Child's First Name"/>
✔	Child Last Name	Child 1 Last Name Child 2 Last Name	<input type="text" value="Child's Last Name"/>
✔	Child Birthday	31/12/2006 31/12/2006	<input type="text" value="Child's Date of Birth / Birthday"/>
✔	Child Gender	Female Male	<input type="text" value="Child's Gender"/>

The import will then be complete and you'll be able to select all parents and click to "send welcome email" - this is the Parent Welcome email template which you checked earlier.

Parents will log in and complete your form, and you can track progress on your dashboard.

Send Welcome Email Preview Email Edit Email Template

Reports New Recent Activities Application Groups Offers Subjects Summary Timetables Tasks Calendar All Activities Group Link

Total number of students imported

136
Registered Students

23
Applications Completed

Number of students whose parents have completed the form

8

Manually Adding Extra Parents and Children

Year 7 Data Collection Admission...

MANAGE USERS

Manually Add People

Manage Duplicates **7**

Add User

Select the type of user

Staff

Student

Parent

Often, extra students are offered places as the appeals process gets underway and offers are accepted/declined elsewhere.

You can either **manually add** extra parents and their children, or **import them via CSV** via the same method previously used.

The process for manually adding is covered step by step in the next slide.

Add Parent

Email

Enter the parent's email address

Back **Next**

Required

First Name*

Last Name*

Optional

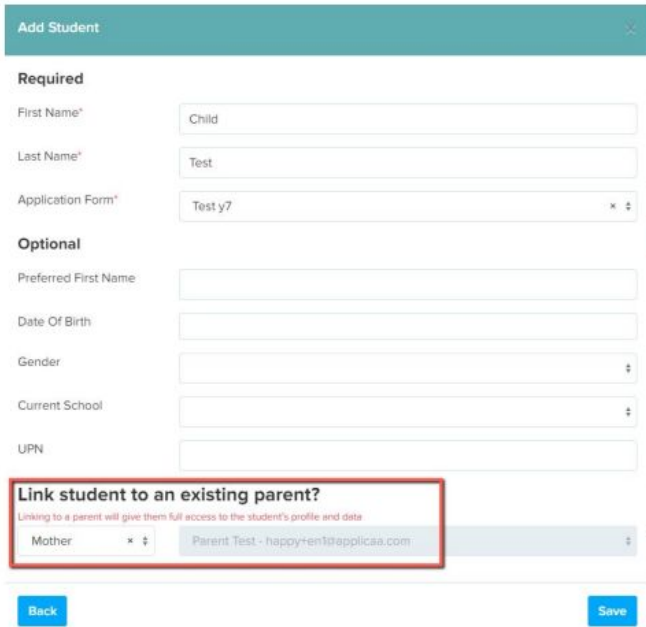
Title

Gender

Date Of Birth

The system will detect any users who already exist, so if you do opt to import new parents via CSV you can add their data to your existing file and re-import it - only the new parents will have accounts created and **no duplicates will be made.**

Once you have added the parent, don't forget to add the child!



Manually adding, step by step:

1. Click “manage users” and select “manually add people”
2. Click “parent” and add their email address
3. Click “next” and add the parent’s first and last name, plus any optional fields if known
4. Click “save” and then “send welcome email”, followed by “done”
5. Search the name of the parent in the search bar at the top of your dashboard and click on them to load their profile
6. Click the “add student” button to add their child’ details and link them to the child
7. Click “save” and “done”

9

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.

Sessions in details

Application Form

Incomplete	7
Awaiting Reference	1
Completed	0
Declined	0
Withdrawn	0
Deadline Missed	0
Waiting List	0

Change Application Status Make Offer Change Offer Status Change Enrolment Status Change Internal Status Change Phase Status Add to group Remove from group **Communications** Reset Passw

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

Showing 1 to 7 of 7 entries 7 rows selected Show 10 entries

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
<input checked="" type="checkbox"/>	20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo
<input checked="" type="checkbox"/>	21	JQNX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail

School

- Send Email
- Send SMS
- Send Reference Requests
- Send Custom Email to Referee
- Send Notification
- Send Student Welcome Email
- Send Parent Welcome Email

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@appliance.com

Template Name *
Incomplete

Target Audience *
Parent

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

Template Description

Set up how you 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

10

Importing data to your MIS

Transferring data to and from your MIS

[Importing internal students from Bromcom to Admissions+](#)

[Data Transfer - Cloud School \(Progresso\)](#)

[How to import Incomplete applications to your MIS](#)

[How to import student and contact data into your MIS from Admissions+](#)

[Adding UDF's and Documents to Admissions+ SIMS Integration \(7mins\)](#)

[Data Transfer - SIMS](#)

[Which fields go to which places in SIMS? \(PDF\)](#)

[Importing students & data from SIMS App into Admissions+ \(5mins\)](#)

[Bromcom Training Webinar Recording \(1 hr\)](#)

The process of importing the completed data to your MIS varies.

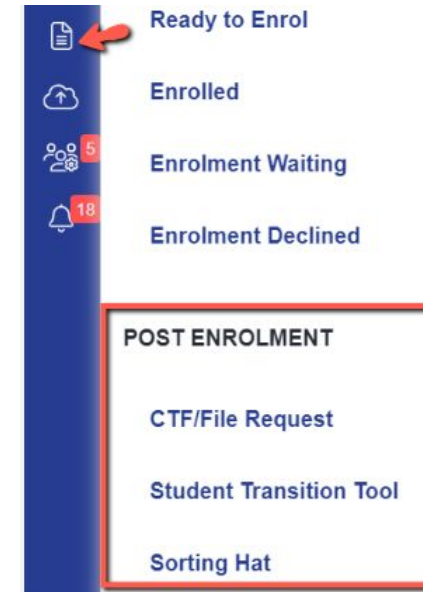
Check the relevant guide on our [Knowledge Base](#) to see the steps specific to your MIS.

If you have any difficulties transferring your data, call us on 0208 762 0882.

Transition Features

These features are in the Post-Enrolment area of your platform, and though there are three features, the one most relevant for a Reception intake will be our Sorting Hat feature.

You'll find the comprehensive guide to our Transition Features [here](#).



The sorting hat enables you to sort students into form groups and transfer those form group allocations to your MIS.

You can configure it to balance groups by a range of factors including gender, ethnicity, current school, SEN status and more.

You can also set parameters to pair certain students together, or set an “avoid” clause to keep particular students apart.

The feature calculates the best fit, based on the criteria you have set and you can manually move students to different groups or rerun the wizard as much as needed.

Sorting Hat



What type of group are you creating?

I'm putting students into tutor/registration groups

I'm putting students into Houses

I'm creating some other kind of group

Import group names from your MIS/SIMS? ⓘ

[Back](#) [Continuosol](#)

How do you want to sort the groups?

Drag to rearrange the priority order of each factor you wish to use when sorting. You can delete any you don't wish to consider, or click on "New Criteria" to sort by a question on your application form.

Criteria	
Gender	<input type="checkbox"/>
Ethnicity	<input type="checkbox"/>
Current School	<input type="checkbox"/>

Group Allocations

[View Totals](#) [Reset All](#) [Allocate Students](#) [Transfer to MIS](#) [Export List](#)

Once you've set your conditions, select all students using the checkbox

Set other criteria here: who should they be paired with and who should they be separated from?

Click to allocate the students, reset if you need to start again, or transfer to your MIS once you're happy!

<input type="checkbox"/>	Student Name	Gender	Ethnicity	Current School	Pair With?	Avoid?	Proposed Group	Lock
<input type="checkbox"/>	Test Karianne Test Hammes	Female	WR0M	Applicaa Demo			Empty	<input type="checkbox"/>
<input type="checkbox"/>	Test Spencer Test Dickinson	Male	BOTH	Balgowan Primary School			Empty	<input type="checkbox"/>
<input type="checkbox"/>	Test Vince Test Jones	Male	WBRI	Applicaa Demo			Empty	<input type="checkbox"/>



Do you have any questions?



THANK YOU