Setting up a Year 7 form with SIF

OVERVIEW

You can design your form to capture Supplementary Information, make offers to parents and then collect full data for those who are offered a place.
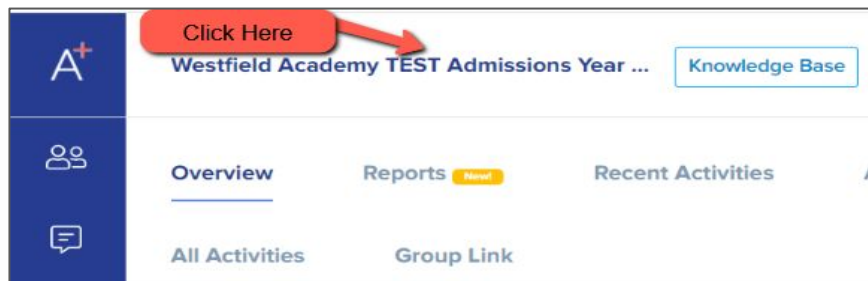
Our default template is designed to run as follows:

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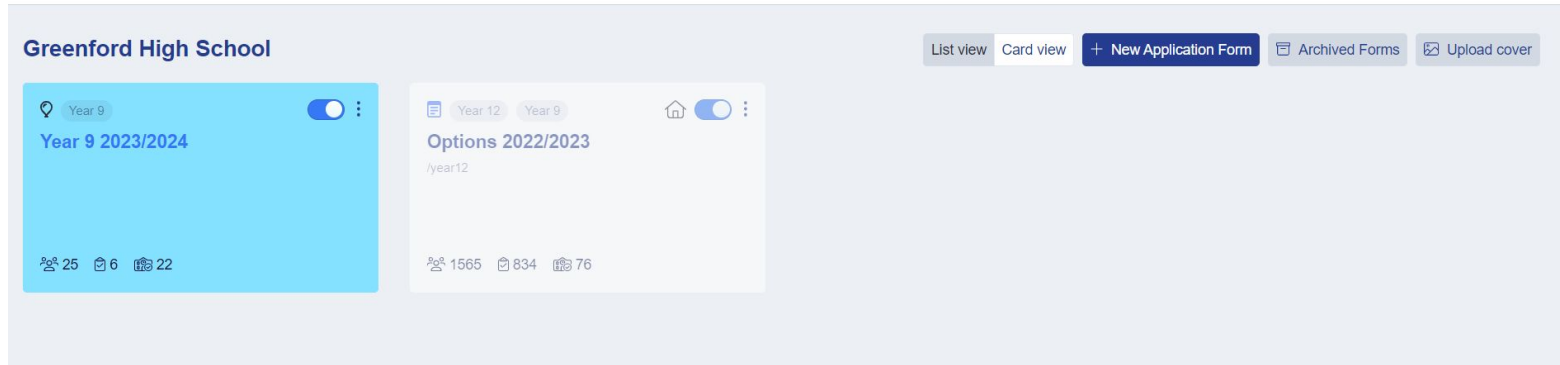- You transfer the completed data to your MIS

How to create your new form
(if this is not your first cycle)

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

If this is your first time setting up, skip to slide 9!

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

Greenford High School

List view | Card view | + New Application Form | Archived Forms | Upload cover

Year 9

Year 9 2023/2024

25   6   22

Year 12   Year 9

Options 2022/2023

/year12

1565   834   76

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

List view | Card view | + New Application Form | Archived Forms | Upload cover
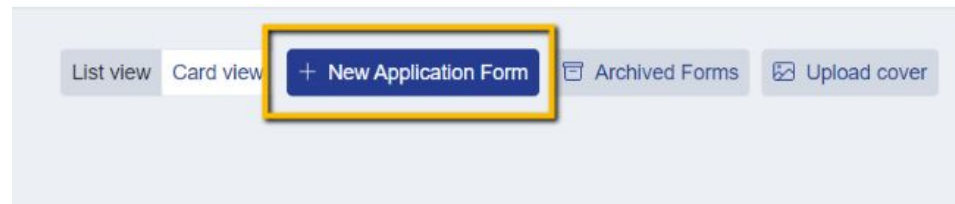
New Application Form

Form Name*

Year 7 with SIF

External Form Name (to parents & students)

Year 7 with SIF

What type of form are you creating?

Year 7 Data Collection

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

Year 7 2021/2022 (2021/2022)

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

Year 7 with Supplementary Information For...

Message users see on the login page of this form

| Paragraph | **B** U _I_ | | | | | |

Set this as my default application form ⓘ

Admissions Year*

2023/2024 ✕

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)

year7

Years of Form

Year 7 ✕

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

📋 Year 7

Year 7 with Supplementary Information Form 2023/2024

/SIF

👥 0   ☑ 0   🏫 0
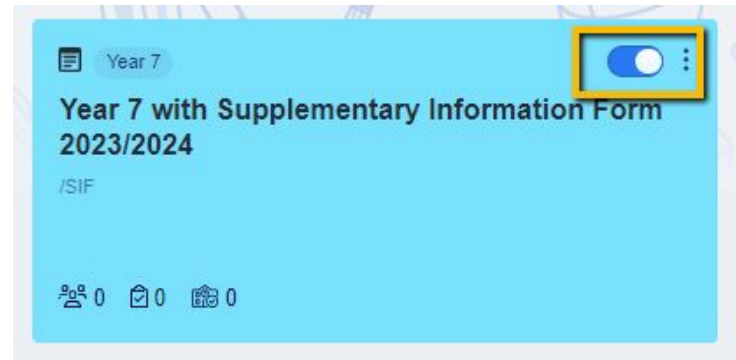
How to close your old form

Now that the previous cycle has finished, you don't want parents completing anything on that form (if you had a Year 7 form previously)
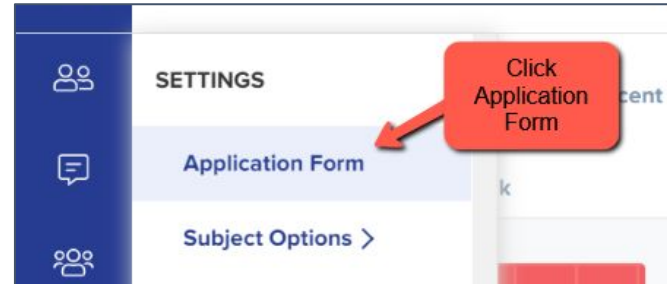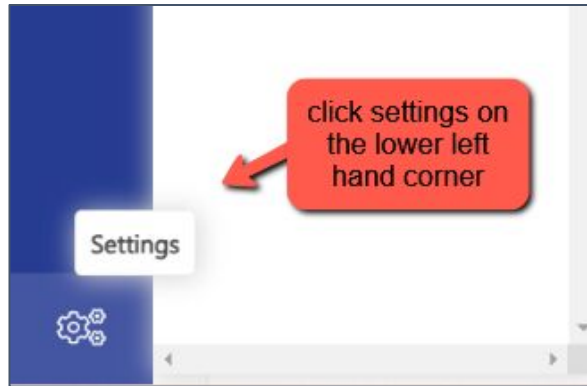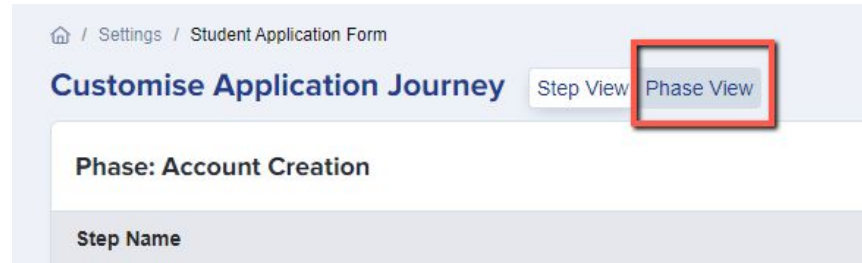
Then go to "phase view" and click the pencil icon for your application form; turn on "disable submissions"

This will ensure no existing forms can be edited - that data is now all managed within your MIS
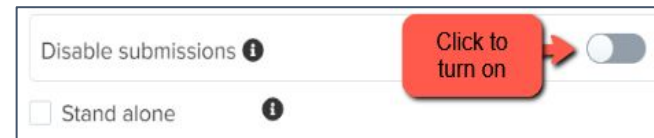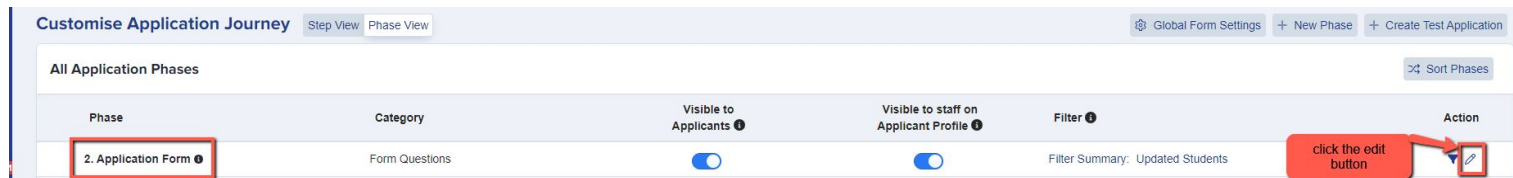
You can also archive old application forms in your forms area if you wish to keep your main forms area tidy

Greenford High School

List view | Card view | + New Application Form | ⊟ Archived Forms | ⊡ Upload cover

⚲ Year 9

Year 9 2023/2024
/year9

Set as default
Open
Edit
Archive Form
Change color ⬤
Change icon

👥 25 📋 6 🗂 22

▤ Year 12 Year 9

Options 2022/2023
/year12

👥 1565 📋 834 🗂 76

Archived forms will be stored here

Add an image to your forms area if you wish (to replace the grey background)

Click the kebab menu to view your options; archive old forms, assign each form a colour and an icon

Editing your Landing Page

Navigate to settings > form settings > landing page

Click the **"edit"** button to make changes

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

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

You can also update any images here as needed, under "general settings"
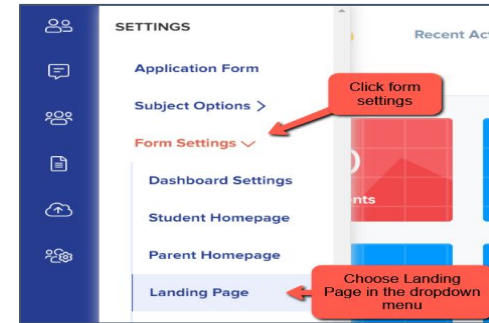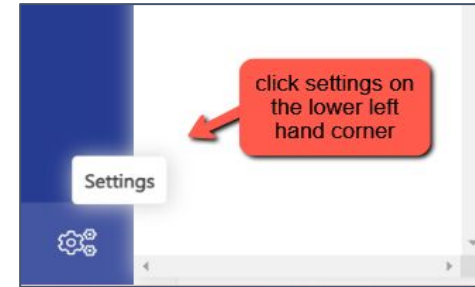
On your landing page, you should also ensure the form is set to allow parents to register, so they can create their own accounts and log in to complete your SIF!

Form Settings

Dashboard   Student Homepage   Parent Homepage   **Landing Page**   Application Groups

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

Editing your Parent Homepage

(settings > form settings > parent homepage)

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

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

What parents will see:

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

Priorities for checking ahead of launch: all stored within the "Year 7 with SIF" folder on your Automated Messages screen:

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

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.

You can also preview the email template if you want to see the layout
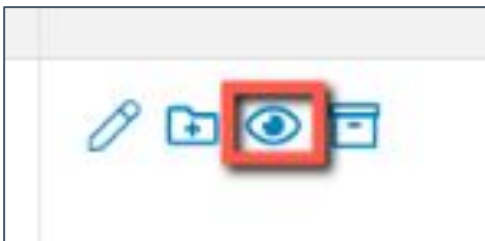
Dear {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}},

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

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

Please use the log in details and link below:

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

We look forward to hearing from you.
Kind regards

Your application phases and settings

Navigate to settings > application form > phase view and turn on all three phases (visible to applicants)
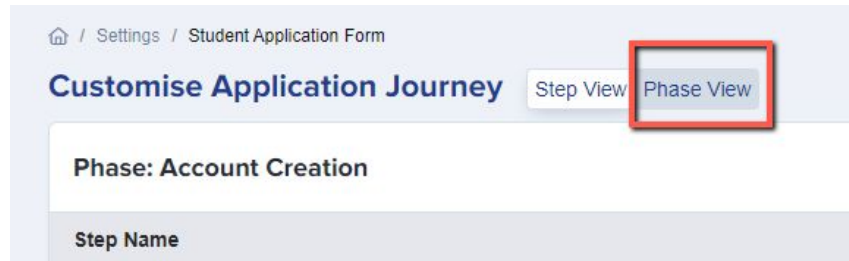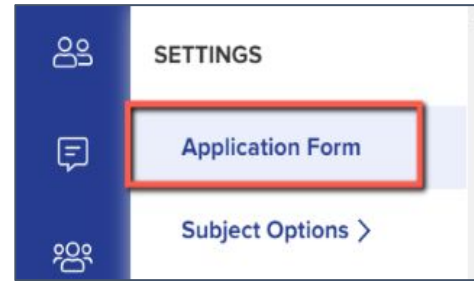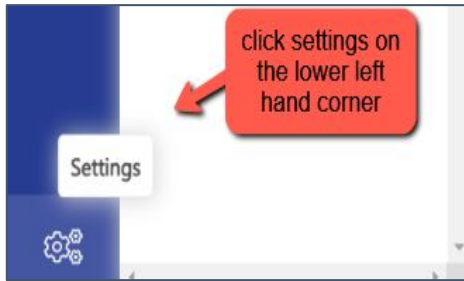
You should also check the names of your phases to ensure they are appropriate to your intake. If you are using our default form, these will already be customised for you, or you can customise them yourself by clicking the pencil icons:

We recommend:
- Application Form > Supplementary Information Form
- Offer (same)
- Enrolment Form > Admissions Form

Customise Application Journey   Step View | Phase View

All Application Phases

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

What parents will see:

Hello Eloyed61b595936cbda8 Stantoned61b595936cbda8,

+ Start New Form

School Message

Test Cristal Test Rice   Student Code: U-EAB6
Edith Cadbury Nursery School

School Message
Please complete all steps of your child's application.

Show full message ✕

Welcome to our application process.

Making the right choice of secondary school for your child is an extremely important decision. If you recognise in us a place where your child could thrive and grow, then I would encourage you to apply.

If there is any further help or information you need then please do not hesitate to contact us.

Show full message

Form Status
Completed

Offer status
Offer Made

APPLICATION OFFER
You received an offer on 19/05/2023. Please respond below:

Decline Offer   Accept Offer

Upcoming Events

Supplementary Information Form Admissions Year 2023/2024

✓ Supplementary Information Form 🔒 → 📄 Offer ✎ → 📄 Admissions Fo... ⓘ

2 JUL
Event
Taster Day
📍 Meet at Reception at 9am
2 Jul, 2021 09:00 AM-27 Jun, 2029 15:00 PM

Open Day
See more

HOME
MESSAGES
CALENDAR

Application Form Area

Settings > Application Form

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

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

Refer a school & get £50 Amazon Voucher! 🚀

Customise Application Journey [Step View | Phase View]

⚙ Global Form Settings   + Create Test Application

Phase: Account Creation

⋮

Step Name	Actions
Step 1: Enquiry ⧉	✎ ⚙
Step 2: Student Registration	✎ ⚙
Step 3: Parent Registration	✎ ⚙

Phase: Supplementary Information Form

⇄ Sort Steps   + New Step   ⋮

Step Name	Internal	External	Visible on Student Profile ⓘ	Actions
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 event of an emergency	🔵	🔵	🔵	✎ ⚙
Step 3: Religion	◯	◯	◯	✎ ⚙
Step 4: Courses	◯	◯	◯	✎ ⚙
Step 5: Payment	◯	◯	◯	✎ ⚙
Step 6: Admissions Criteria Please tick the admissions category which applies to your child:	🔵	🔵	🔵	✎ ⚙ 🗑

Always on, cannot be disabled

Phase: Offer

⇄ Sort Steps   + New Step   ⋮

Step Name	Internal	External	Visible on Student Profile ⓘ	Actions

Phase: Admissions Form ⟳ Last synced with Application Form: 25/05/2022 03:12PM

Step Name	Internal	External	Visible on Student Profile ⓘ	Actions
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 event of an emergency	🔵	🔵	🔵	✎ ⚙
Step 3: Child's Welfare and Support Information	🔵	🔵	🔵	✎ ⚙
Step 4: Parental Agreement and Consent	🔵	🔵	🔵	✎ ⚙
Step 5: Child's Education	🔵	🔵	🔵	✎ ⚙
Step 6: Additional Information	⬜	⬜	⬜	✎ ⚙
Step 7: Religion	🔵	🔵	🔵	✎ ⚙
Step 8: Courses	⬜	⬜	⬜	✎ ⚙
Step 9: Admissions Criteria Please tick the admissions category which applies to your son:	⬜	⬜	⬜	✎ ⚙ 🗑

[Sort Steps] [+ New Step] ⋮

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

Within your phases, make any changes to questions/fields - have you got new User Defined Fields to add in? Are there questions you wish you'd asked applicants last cycle? Now is the time to add those in!

Click "+ New" and you will see your UDFs on the left of the window. UDFs can write back to your MIS, so they are great for capturing extra data that you don't have to manually input.

Here is a link to our form customisation guide

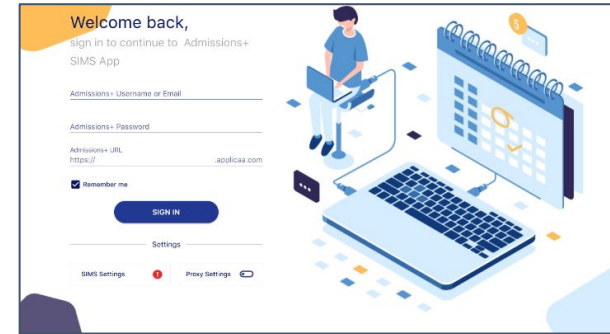Navigate to **settings > application form** and click on the name of a step to open it

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

Add your UDFs in your MIS, then:

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

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

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

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

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

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

Navigate to settings > school settings > address mapping

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

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

Setting up open evenings and events

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

Navigate to **communications and events > events > event calendar**
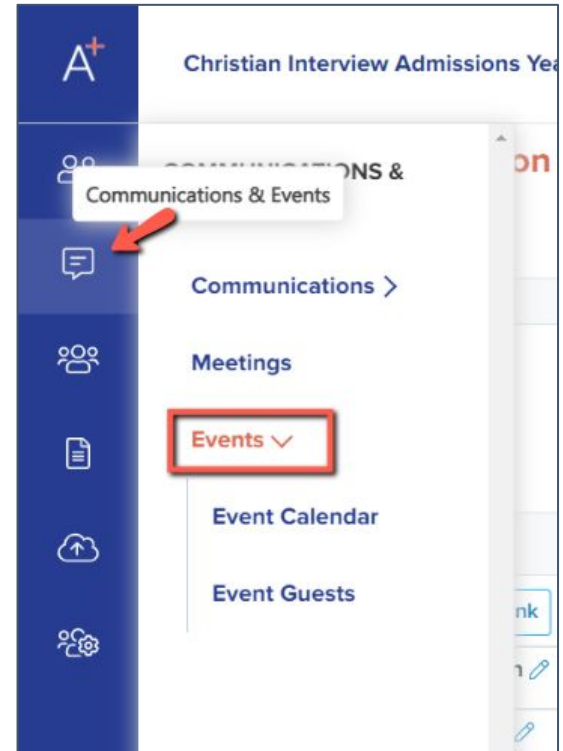
Click to create a new event and set your parameters: is there a limit on places?
- Do people need to register?
- Do registrants need to receive an email once registered?

Events

Events   Event Guests

Event Calendar

Date	Type	Event	Public URL	Send email to newly registered account
Friday 19 February, 2021 15:00 - 15:30	Interview	Test event Test event	https://demo.applicaa.com/events/62	✔ Edit Template

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

Edit Event   ✕

Name *
New event

Event type
Open Evening

Start date *   End date *
31/03/2021   31/03/2021

Start time *   End time *
12   00   12   30

Description *

Paragraph   B U I ⫶⫶ ⫶⫶ ⫶⫶ ⫶⫶ S 🔗 A A A ⫶⫶ ⫶⫶   ⫶

Year 12 Open Evening - please register to attend.

Location
Main School Site

Number of attendees   Set your limits
☐ Unlimited   Set maximum number   300

Maximum number per registration   For every registrant, you can limit the number of additional people they can bring with them
4

Message to show when the event is fully booked
This event is fully booked

File
Choose file   No file chosen

Entry exam for Course

Which forms does this event relate to?

Apply for
Year 7 Data Collection Admissions Form 2021/2022 (2021/2022, 2023/2024) ✕   ✕

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

☑ Display on Application form home page(login page) of related forms   ☐ Add Pop up to Application form home page(login page) of related forms
☑ Display on student home page   ☐ Add popup to student home page
☑ Display on parent home page based on the child's application form ⓘ   ☑ Add popup to parent home page
☐ Display on parent home page for all parents ⓘ
☐ Display on enquiry form

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

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

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

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

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

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

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

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

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

IMPORTING DATA TO YOUR MIS

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

Check the relevant guide on our Knowledge Base to follow the steps specific to your MIS.

If you have any difficulties please call us on 0208 762 0882