

Webinar: May 2021

Online Forms (Part 1 of 2) in QuickSchools

Introductions

Your Presenter

Azroy Kandan

Head of Support



Q&A Panelists

- Ezekiel: Technical Support Specialist
- Eralyn: Technical Support Specialist

Let's take a Poll

Webinar Format

- Presentation - 15 min
- Live Demo - 10 min
- Q & A / Close - 5 min

Please submit your questions via “Q&A”. Panelists will answer questions.

Certain questions will be addressed by the Presenter via Live Demo

After the Webinar

- There's a survey after the webinar ends.
- Link to survey will also be included in Thank You email, which we'll send out after the webinar
- You can indicate in the Survey if you're interested a recording of this webinar

Please send us feedback

Agenda / Topics

Webinar 1 of 2 focusing on introducing online forms:

- Introduction
- Potential Scenarios
- Modes of Collecting Data
- Full Integration to SIS
- Basic Tools / Features
- Key Concepts
- Live Demo
- Summary

Introduction - Digitize a Paper Process

Digitize a Paper Process

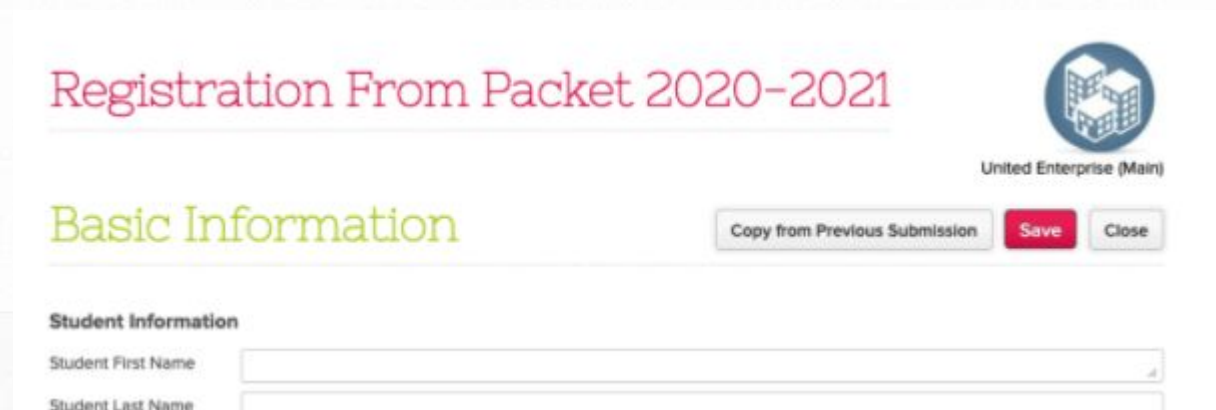
- Form Packet contains multiple Forms
- PDF vs. Custom Fields
- SVG for Cross-Platform PDF Compatibility

Let's take a Poll

Introduction - Easy for Applicants

We make it easy for applicants

- Mapped System fields are Pre-Filled
- Commonly Mapped fields are Pre-Filled
- Previous Submissions can be Copied forward
 - From a previous packet that was archived
 - From a previous submission



Registration From Packet 2020-2021

United Enterprise (Main)

Basic Information

Copy from Previous Submission Save Close

Student Information

Student First Name

Student Last Name

Introduction - Easy to Export

- Custom Fields are reportable via the Report Creator
- Bulk download specific PDF files within your Form Packet.
 - For example, export/print all the “Health Forms” to be filed at the nurses office.



The screenshot shows a dialog box titled "Bulk Download Form" with a green header. Below the header, the text "Select Form Below:" is followed by a dropdown menu currently displaying "Student Information" with a downward arrow. At the bottom of the dialog, there are two buttons: a red "Download" button and a grey "Cancel" button.

Introduction - Installation

Let's take a Poll

- The Online Forms App is available on our App Store

The screenshot displays the 'App Store' interface. At the top, there are two tabs: 'App Store' (selected) and 'My Apps'. Below the tabs is a search bar containing the text 'online forms' and a magnifying glass icon. To the right of the search bar is a 'Clear Search' link. Below the search bar is a horizontal menu with the following categories: 'Community Apps', 'External Content', 'School Administrator Apps', 'School Apps', 'Student Learning Apps', and 'Teacher Apps'. The 'School Apps' category is selected, and a sub-section titled 'School Apps' is visible. In this sub-section, the 'Online Forms' app is featured, represented by a dark red square icon with a white clipboard and a green checkmark. Below the icon, the text 'Online Forms' is displayed.

Potential Scenarios

Digitize any paper process

- New Student Applications
- Re-Enrollment Forms (for existing students)
- Employee Vacation / Leave Forms
- Permission Slips
- Sell School Merchandise
- Fund-Raising
- Surveys

Models of Collecting Data

Multiple Ways for Collecting Data

- Public URL
- Embedded on your Website
- Portal
- Invite via Email (using Email Templates)
- Kiosk (for users without email / internet)

Let's take a Poll

Integrates with SIS

- Convert applications to Student record
- Link submissions to Student record
- Works with District/ Group School
 - Transfer Submissions
- Portal Access with Reminder / Lock feature Parents
- Collect Fees Online (via Stripe) or automatically create Fee Tracking records

Let's take a Poll

Basic Tools / Features

- Custom Status / Workflow
- Email Template
- Applicants can upload attachments
- Save before submitting (for non-Portal users)
- Copy & Archive
- Forms by Grade Level
- Electronic Signatures
- Optional Multi-Step Submission Process

Key Concepts

“Regular” vs “Enrollment/Registration Form”

- Convert the submission to a Student record
- Can also be used to UPDATE an existing student record

FORM PACKET SETTINGS

Enrollment/Registration Form

If this form packet is for an enrollment/registration flow, set that here.

Type

- Regular Form
- Enrollment/Registration Form

Key Concepts

One Form Per Child (OFPC)

- Form is linked to the student (each student gets ONE form)
- If multiple parents access the same student, the form can only be submitted ONCE

One Form Per Child

If this form is for parents, and if they should submit a separate entry for each child, select below. Each form submitted will be linked to the specific existing child. For example, Student Re-Enrollment should have this setting turned on.

Turn on One Form Per Child mode

Key Concepts

Non-Authenticated User

- Allows users to save their submission with access to a QuickSchools Portal
- Uses email address and reference number

Non-authenticated users - can save & retrieve

Allows users without a login to fill out a form, save it, and retrieve it later via a reference number

- Turn on
- Users can only retrieve an existing submission
- Warn when inviting users with the same email address

Questions?

Live Demo



Summary

Online Forms App can Digitize a Paper-Process

- Multiple Ways to Collect Data
- Easy for Applicants
- Reportable and Exportable
- Collect Fees

Let's take a Poll

Future Improvements

- Conditional Fields
- Dashboard / Indicators
- Re-Organizing of Features (to improve flow)

Upcoming Webinars

We have another webinar in 2 weeks, where we're go over the Online Forms in more detail, and review a few specific scenarios.

Next month, we'll do a webinar on Fee Tracking and Online Payments

Thank You

Don't forget the survey

