CHARTER LOTTERY · ORGANIZATION ADMINS

Organization Admin Walkthrough

Setting up a charter school network in Charter Lottery and building its own application. Every picture is a full 1440 × 900 laptop window, or a phone where it shows what families see, from the current application, seen as an Organization Admin, using a made-up network, Riverbend Charter Schools, and a made-up admin, Dana Whitfield.

1. Sign in for the first time
2. Your organization
3. Settings that reach families
4. Build your application
5. Choices for each school
6. See it as a family
7. After applications arrive
Where answers appear and application go-live checklist

Decide first

Question	Answer
One application or several?	Most organizations build one Custom application that every school follows. Give a school its own only when it asks different questions, or keep it on Standard.
Which priority questions stay?	The standard application asks five self-reported priorities. Hide one only if no school weights it: a hidden question is saved as "no" for every family.
What else must you ask?	Your own questions never change priority or eligibility. Social Security numbers, immigration status and citizenship are refused; questions on race, religion, disability or grades get a warning.
Who writes the Spanish?	Every question needs English and Spanish text, and families read their own language. Have a fluent Spanish speaker review it.
When do you switch?	Switching changes open and draft cycles with no applications at once; cycles with applications keep theirs. Switch before the first cycle opens.
Who are your organization admins?	At least two people. Only organization admins change the application, invite staff or change settings.

Gather first

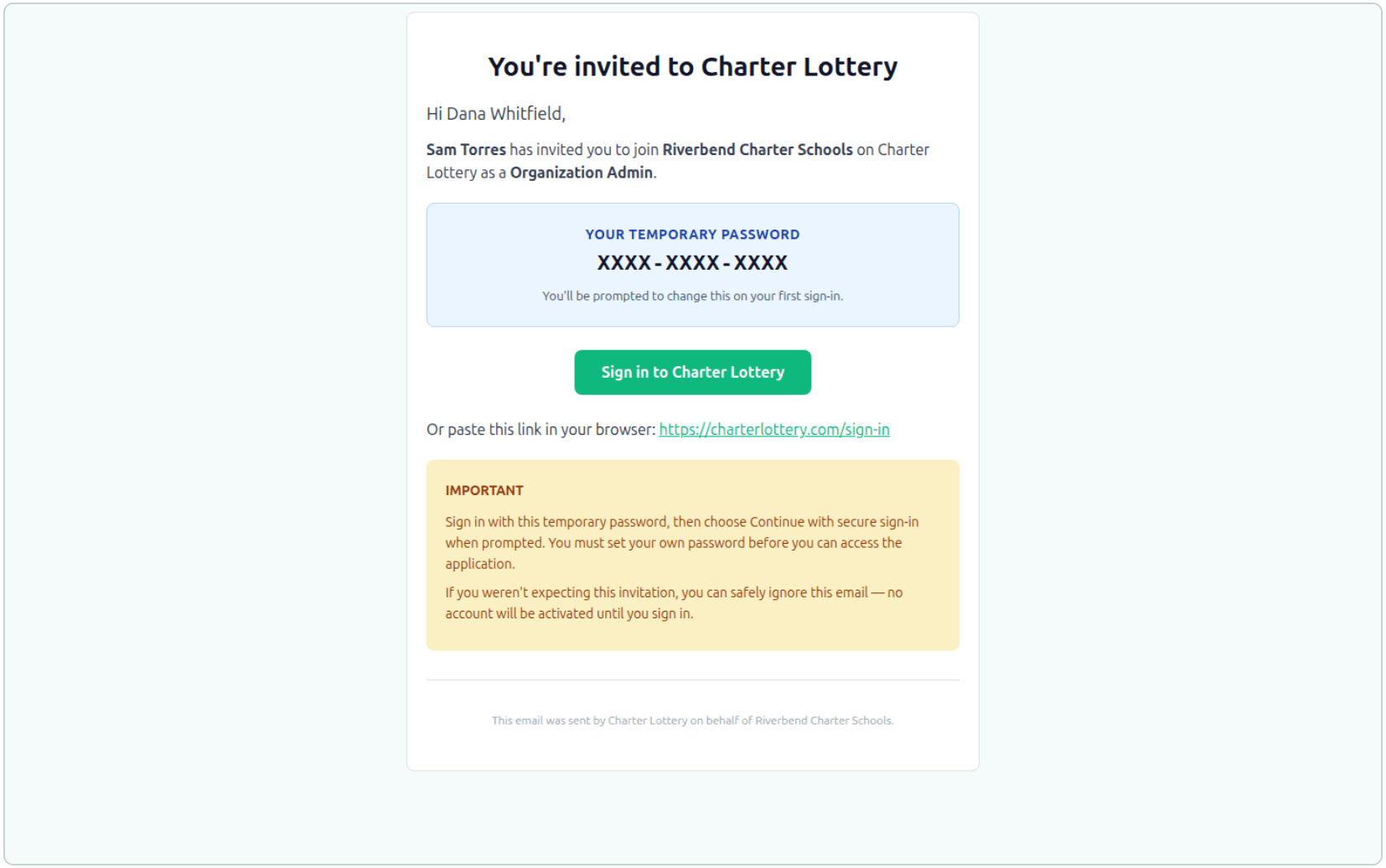
- The invitation email, opened within 7 days, a phone with an authenticator app and a password manager
- Each campus: name, public phone and email, street address, time zone
- Staff: name, work email, role, and which campuses each person runs
- The application you use today, with every question you need to keep
- Spanish wording for each question, from someone who writes Spanish fluently
- Your logo as PNG or JPG (no SVG), about 400 × 200 px, and each school's priority weights and required documents

PART 1

Sign in for the first time

Step 1. Open the invitation

The person who set up your organization invites you as an **Organization Admin**. The email comes from `noreply@charterlottery.com` with a temporary password valid for **7 days**. If it has expired, ask them to resend it.

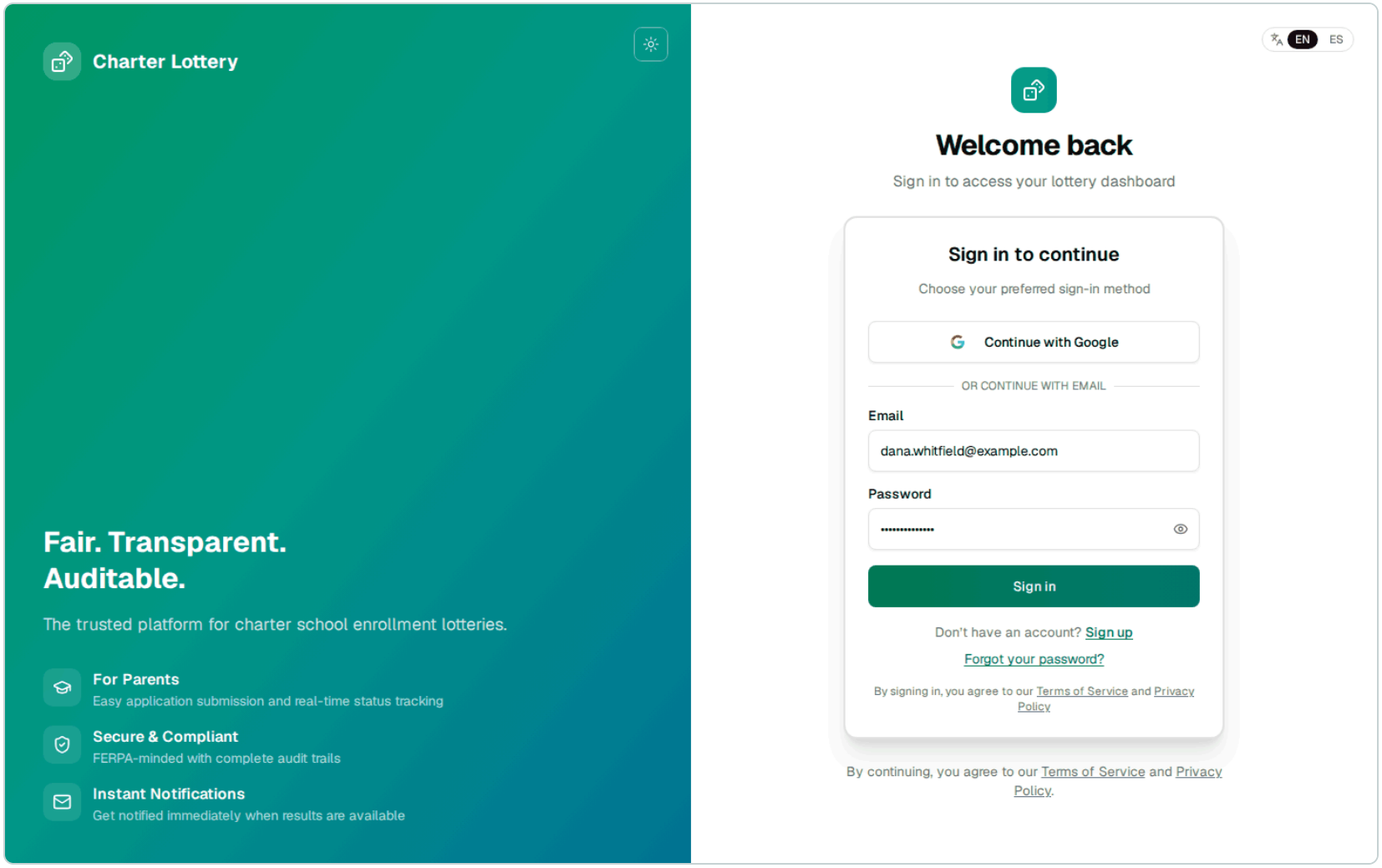


The invitation email, with the password masked.

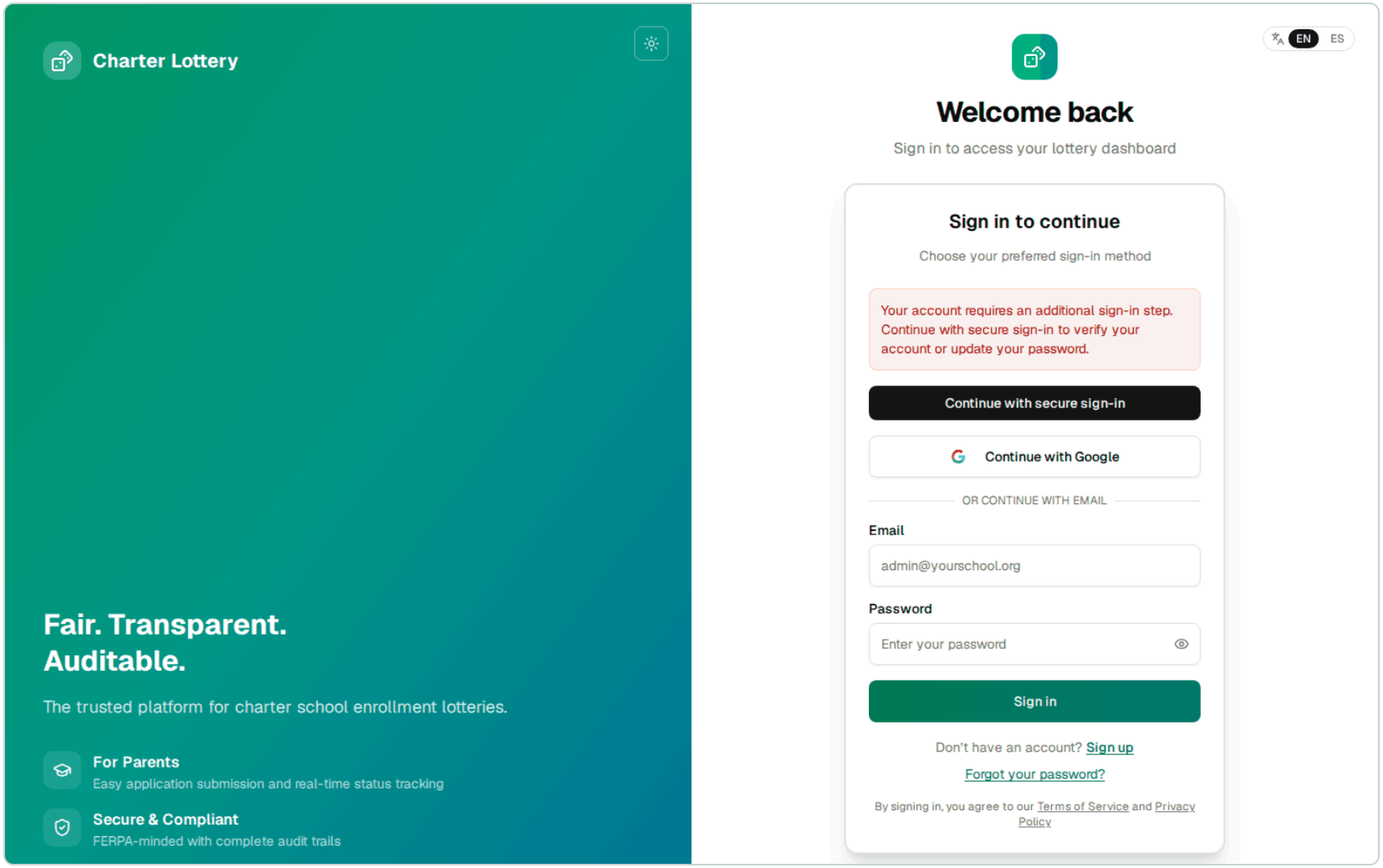
Step 2. Sign in and set your password

Enter your email and the temporary password, then select **Sign in**. Select **Continue with secure sign-in** and choose your own password on the page that opens, which is not pictured.

If your Google Workspace account uses the same email, you can use **Continue with Google** instead.



Sign in with the temporary password.

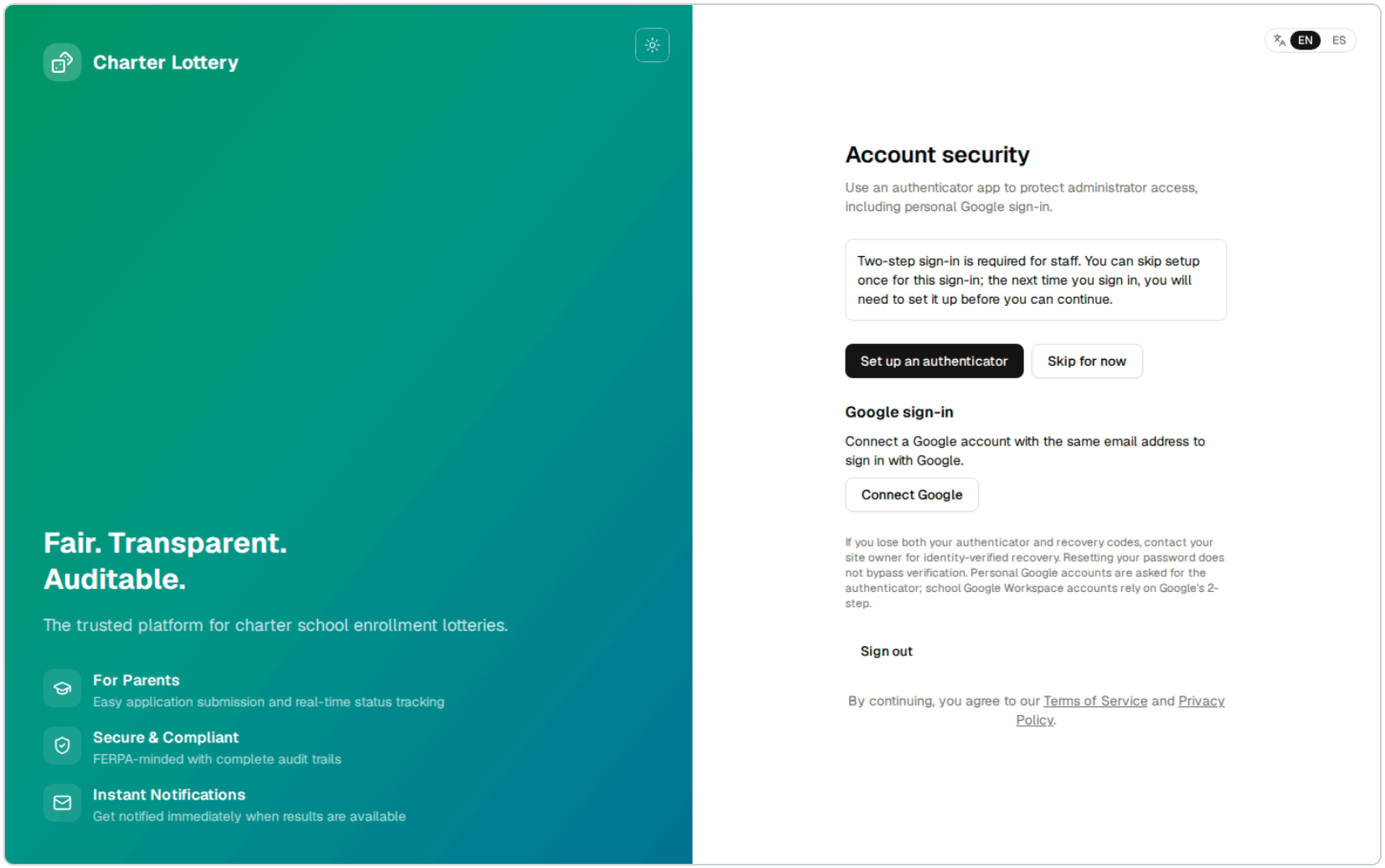


Continue with secure sign-in.

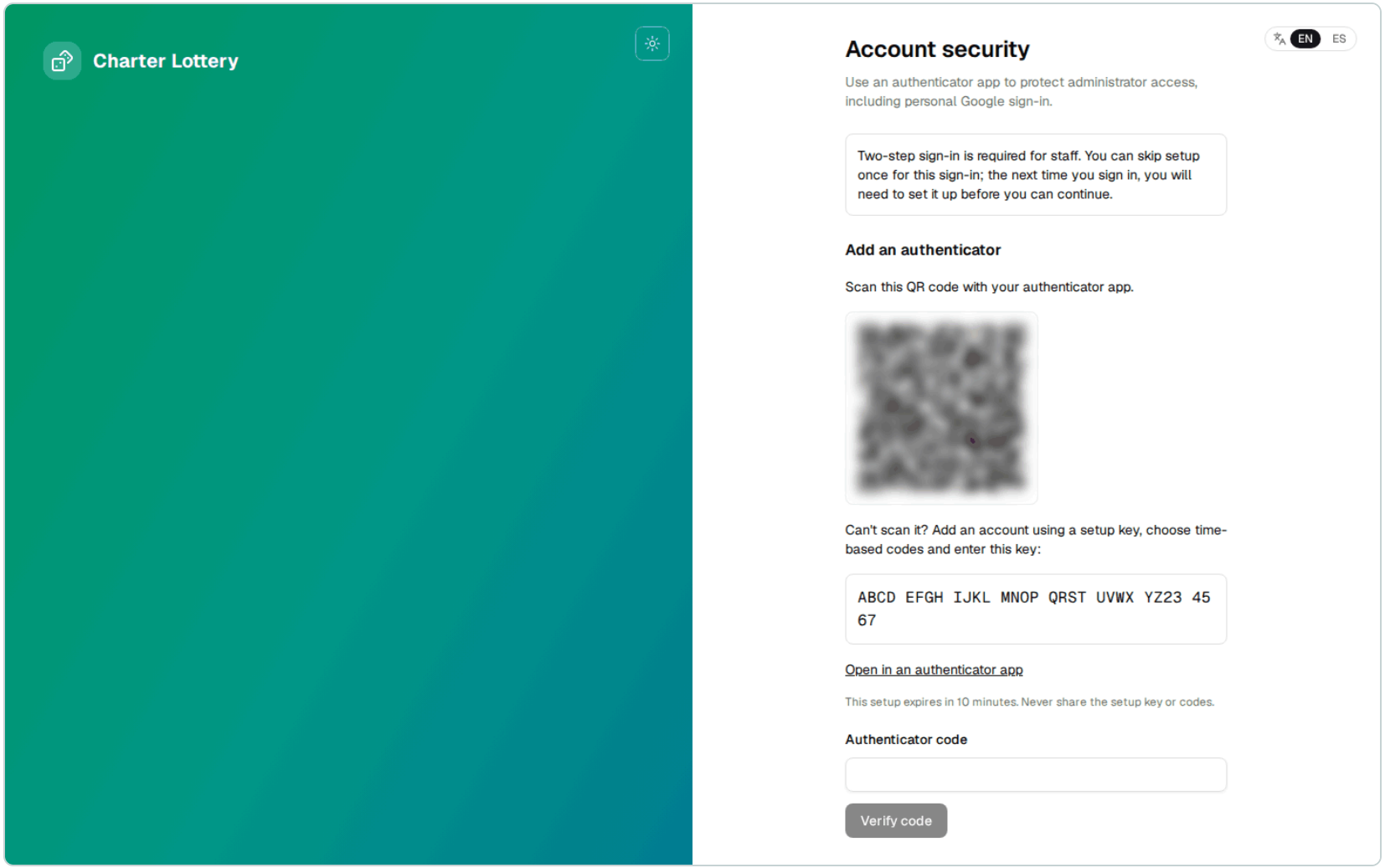
Step 3. Set up two-step sign-in

Select **Set up an authenticator**, scan the code with an authenticator app and enter the six-digit code.

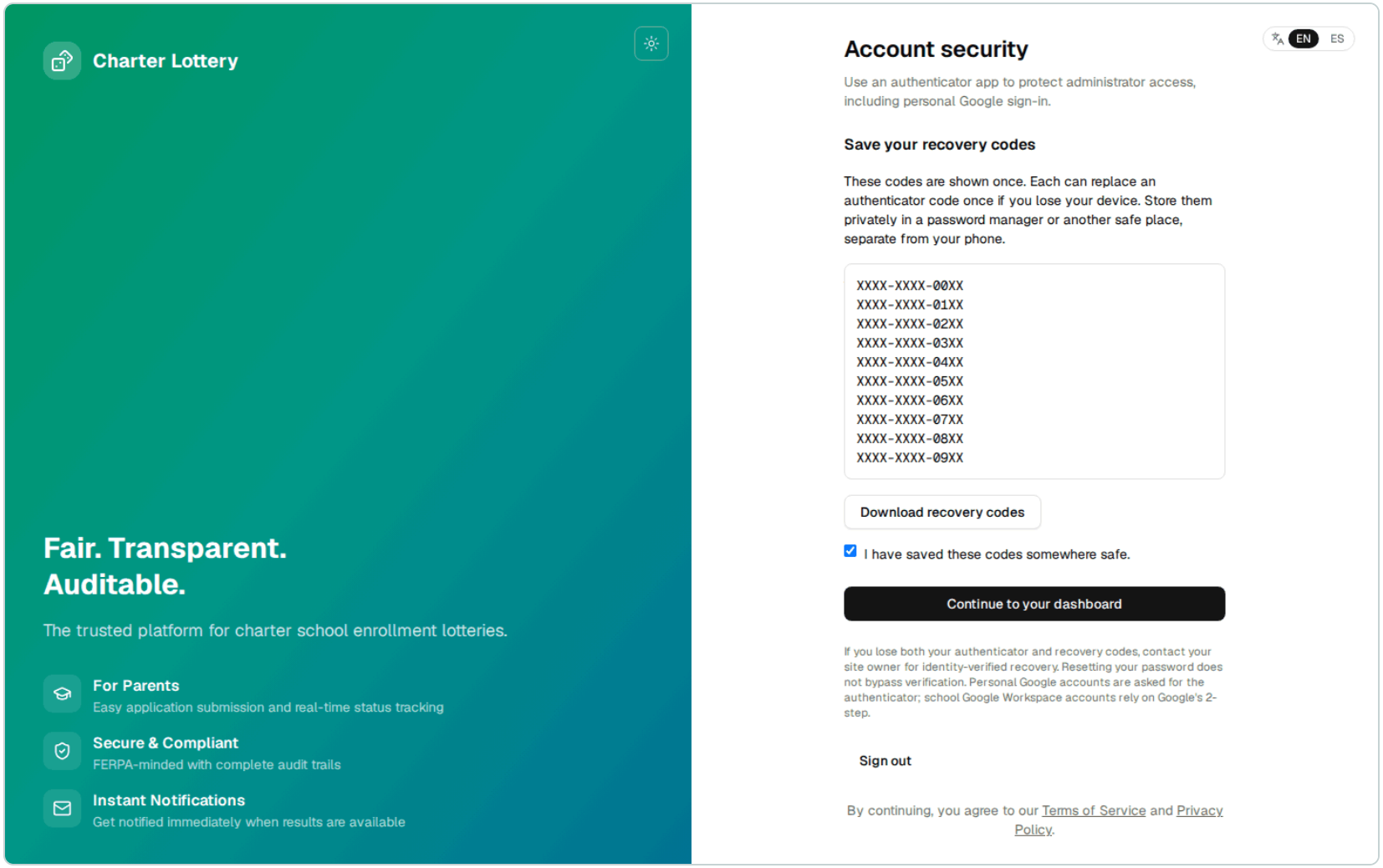
The 10 recovery codes are shown once: save them in a password manager, tick the box and select **Continue to your dashboard**. Google Workspace sign-ins skip this; Google's 2-Step Verification applies.



Account security on first sign-in.



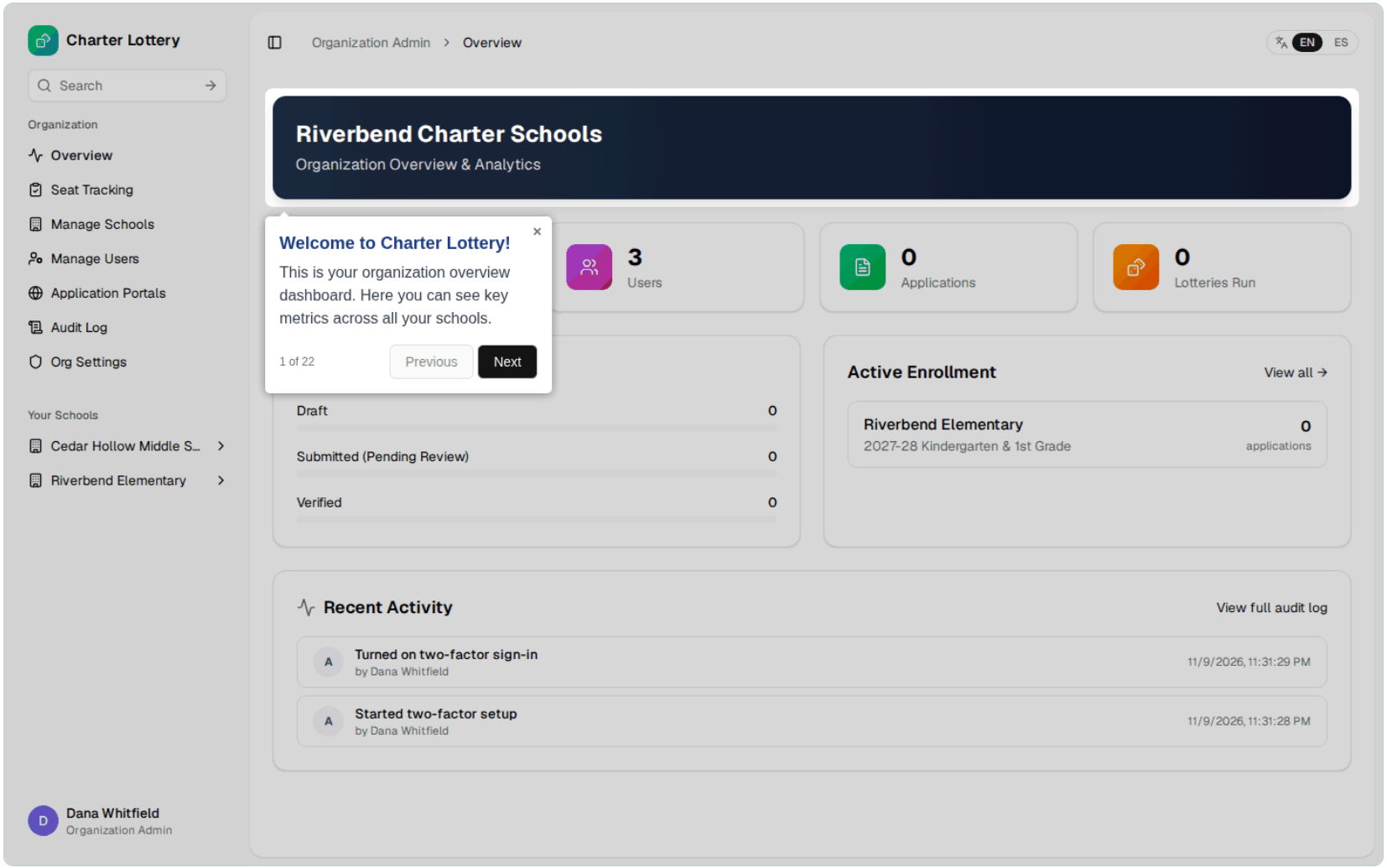
The QR code and setup key, masked.



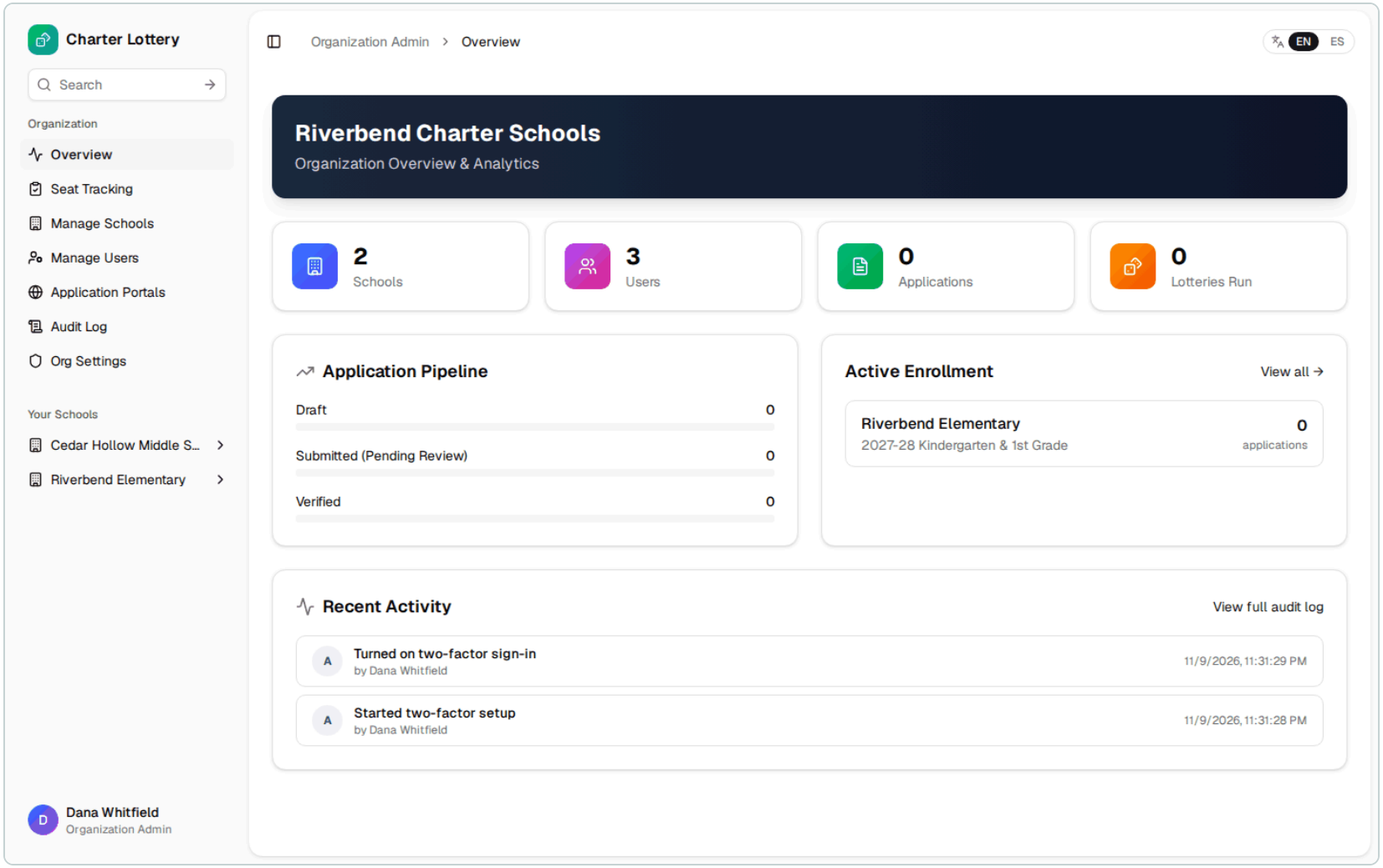
Recovery codes, masked in this picture.

Step 4. Take or close the welcome tour

Organization Admins get a 22-step tour on first arrival. Close it with **×** and restart it later from Account Settings. **Overview** then shows your schools, users, applications and open cycles.



The first tour step.



Overview at the first sign-in.

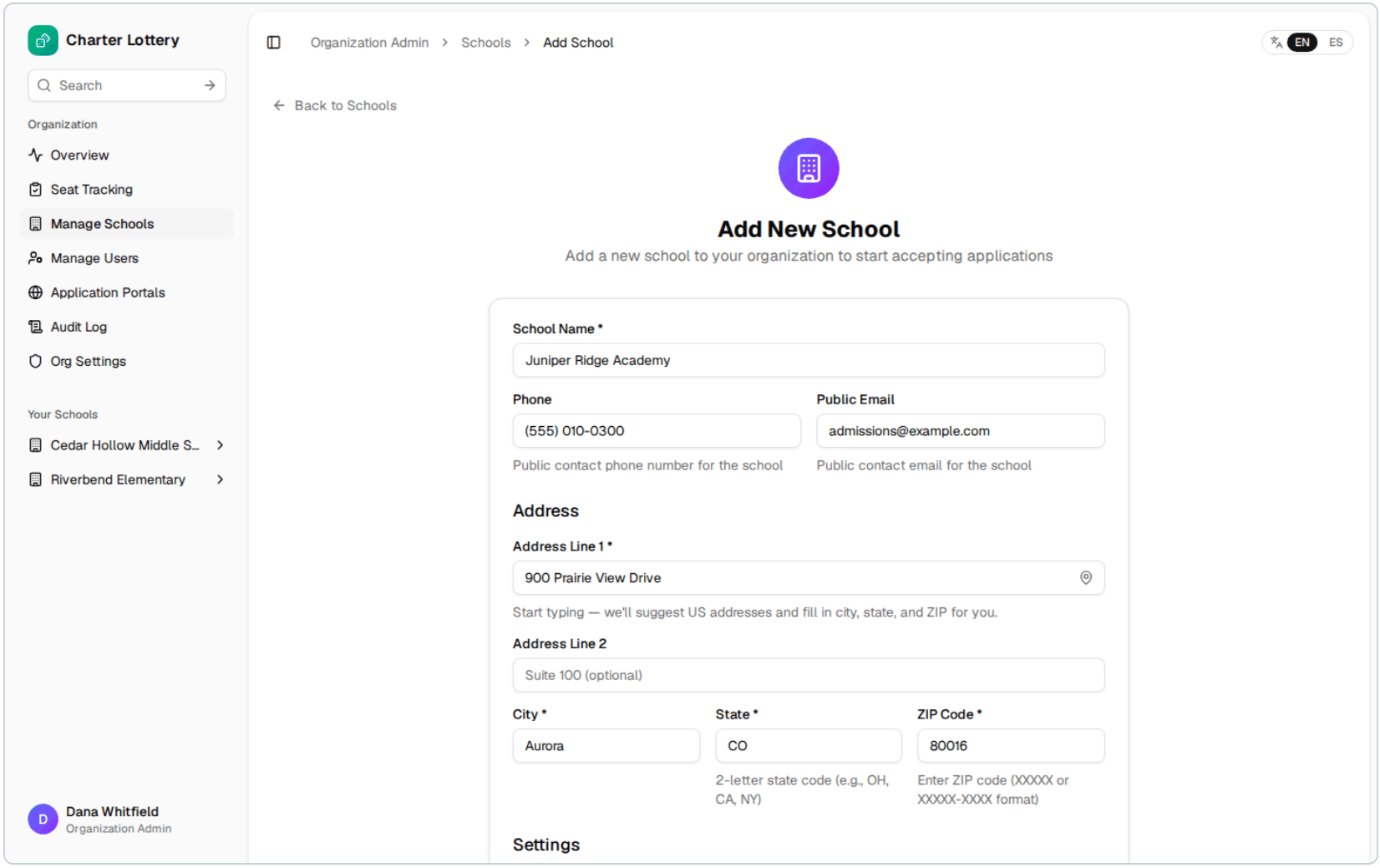
PART 2

Your organization

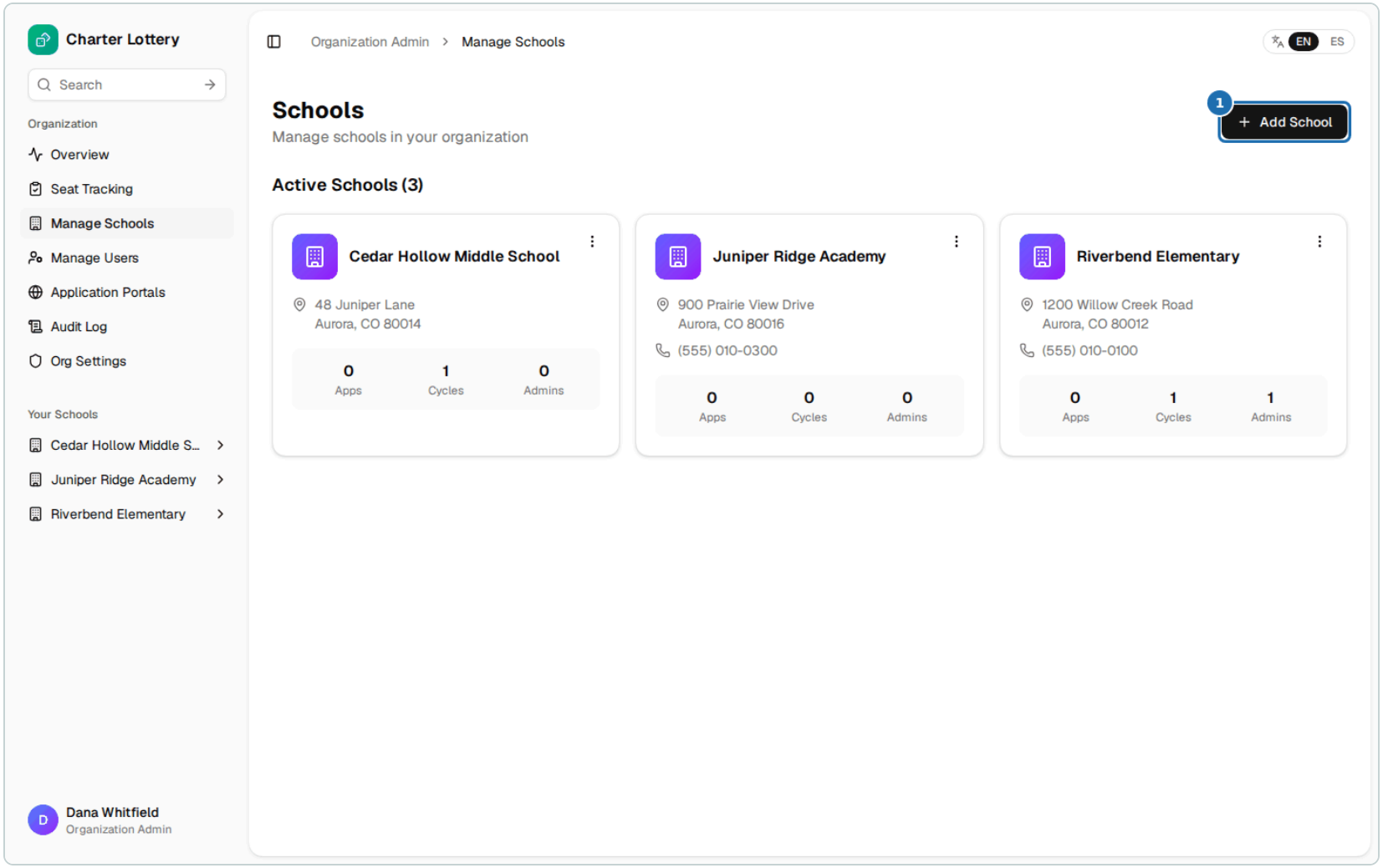
Step 5. Add a school

Choose **Manage Schools**, then **Add School**. On the live site, typing the street address offers suggestions that fill in city, state and ZIP. Check the **Timezone**, because deadlines show in it, and select **Create School**.

Each campus runs its own lotteries and has its own subscription.



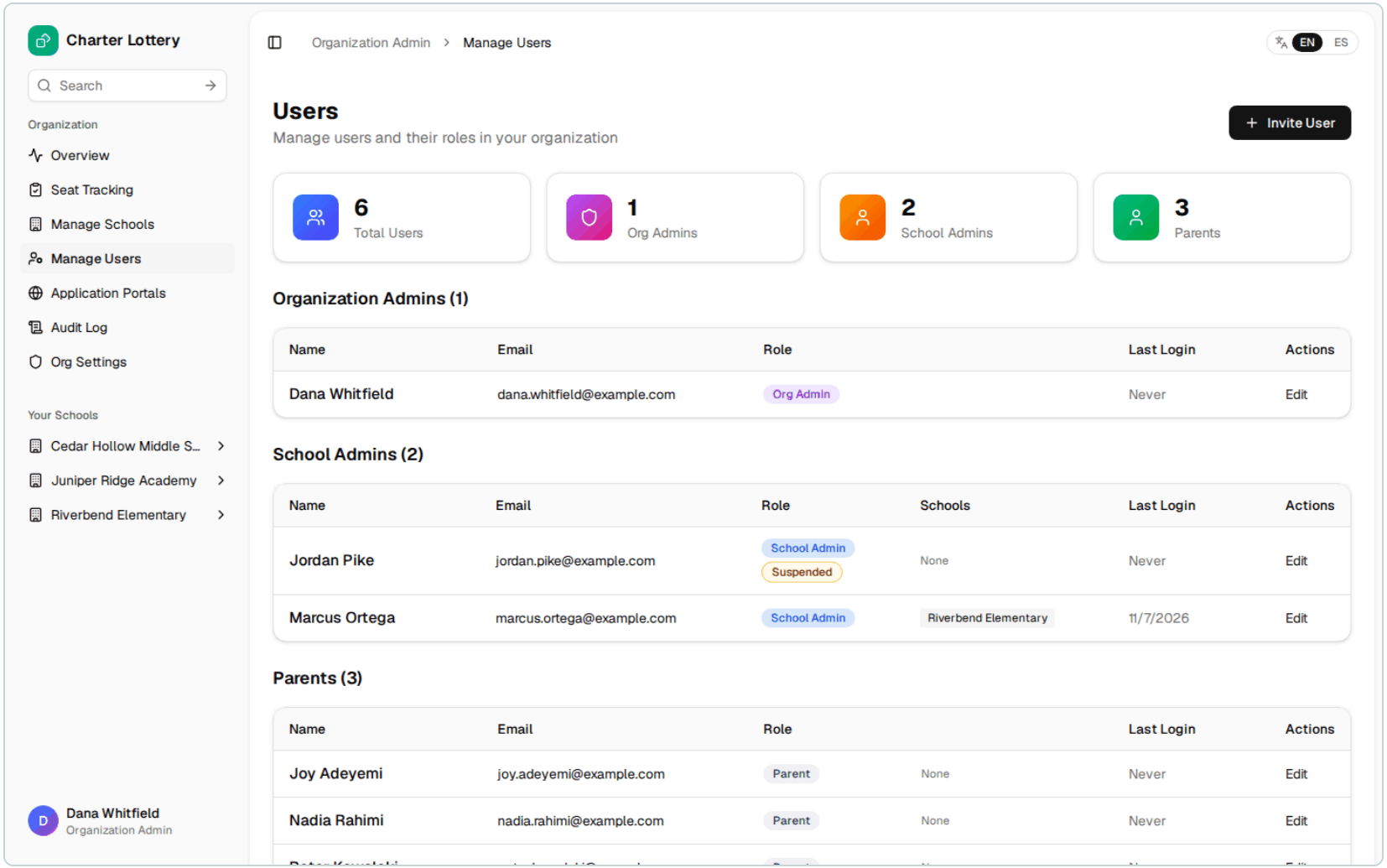
A new campus, Juniper Ridge Academy.



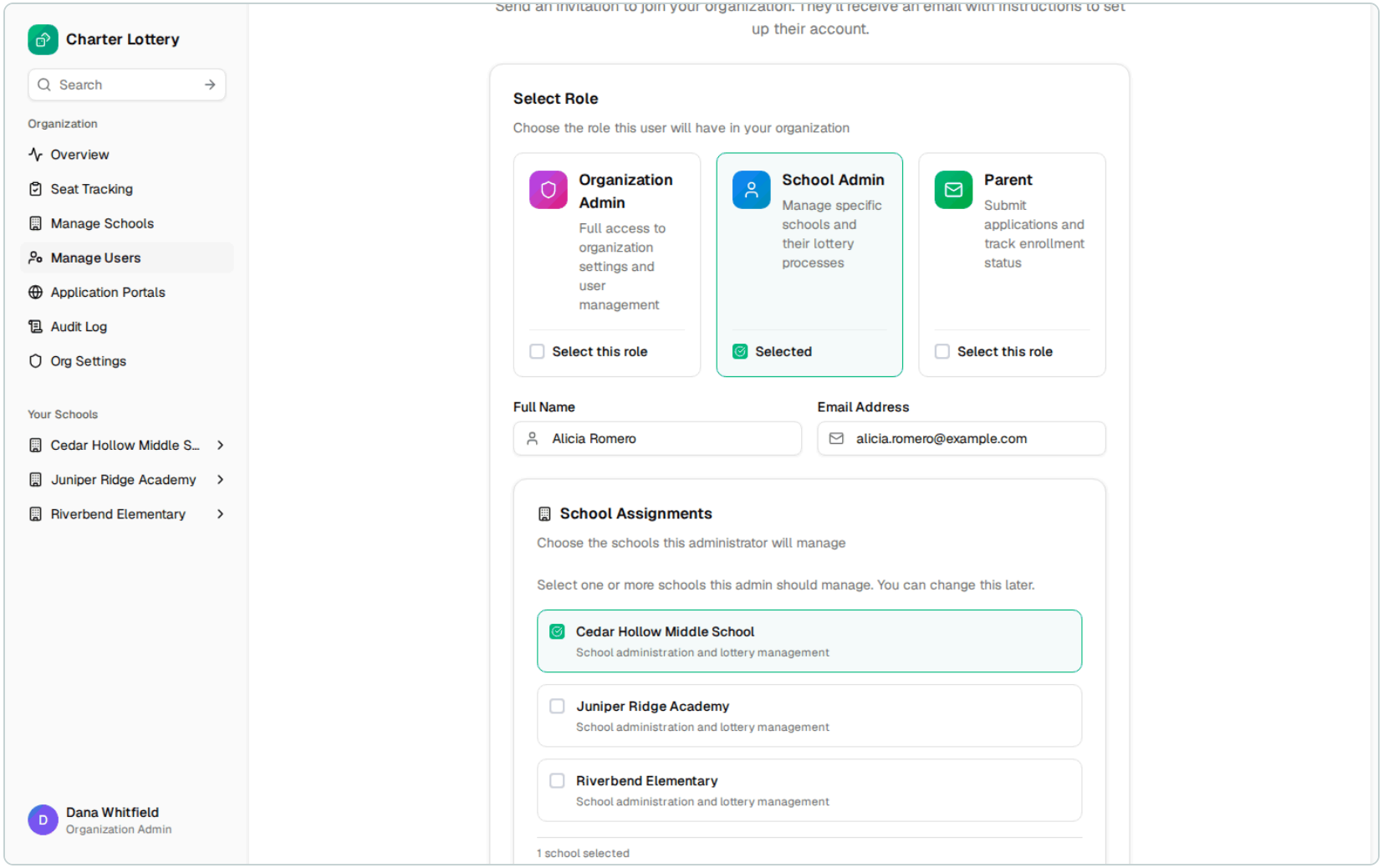
Three schools. Add School is marked 1.

Step 6. Invite a school admin

Manage Users lists everyone by role and marks suspended accounts. Select **Invite User**, choose **School Admin**, enter the name and email and tick the schools this person runs. Select **Send Invitation**.



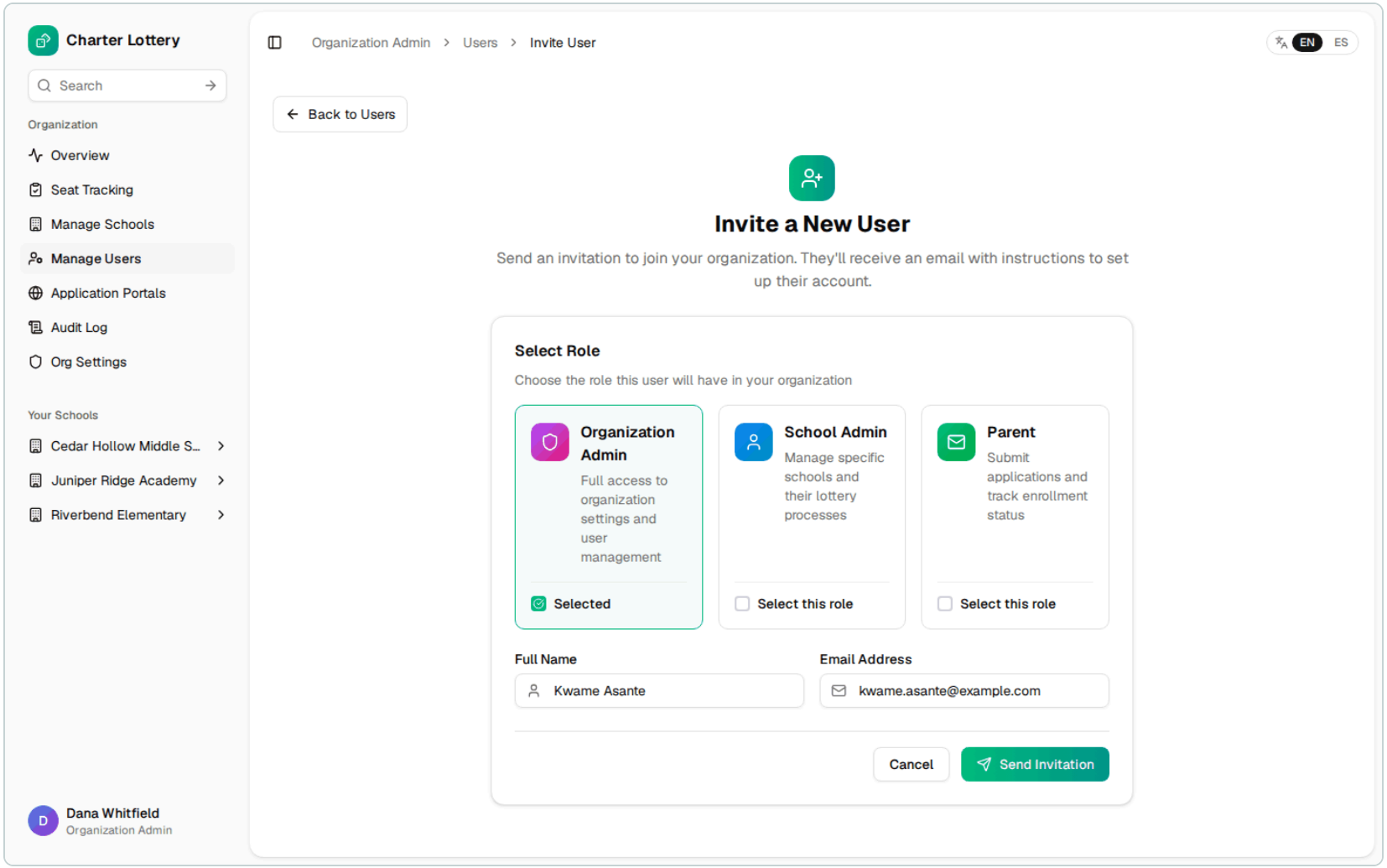
The Users page.



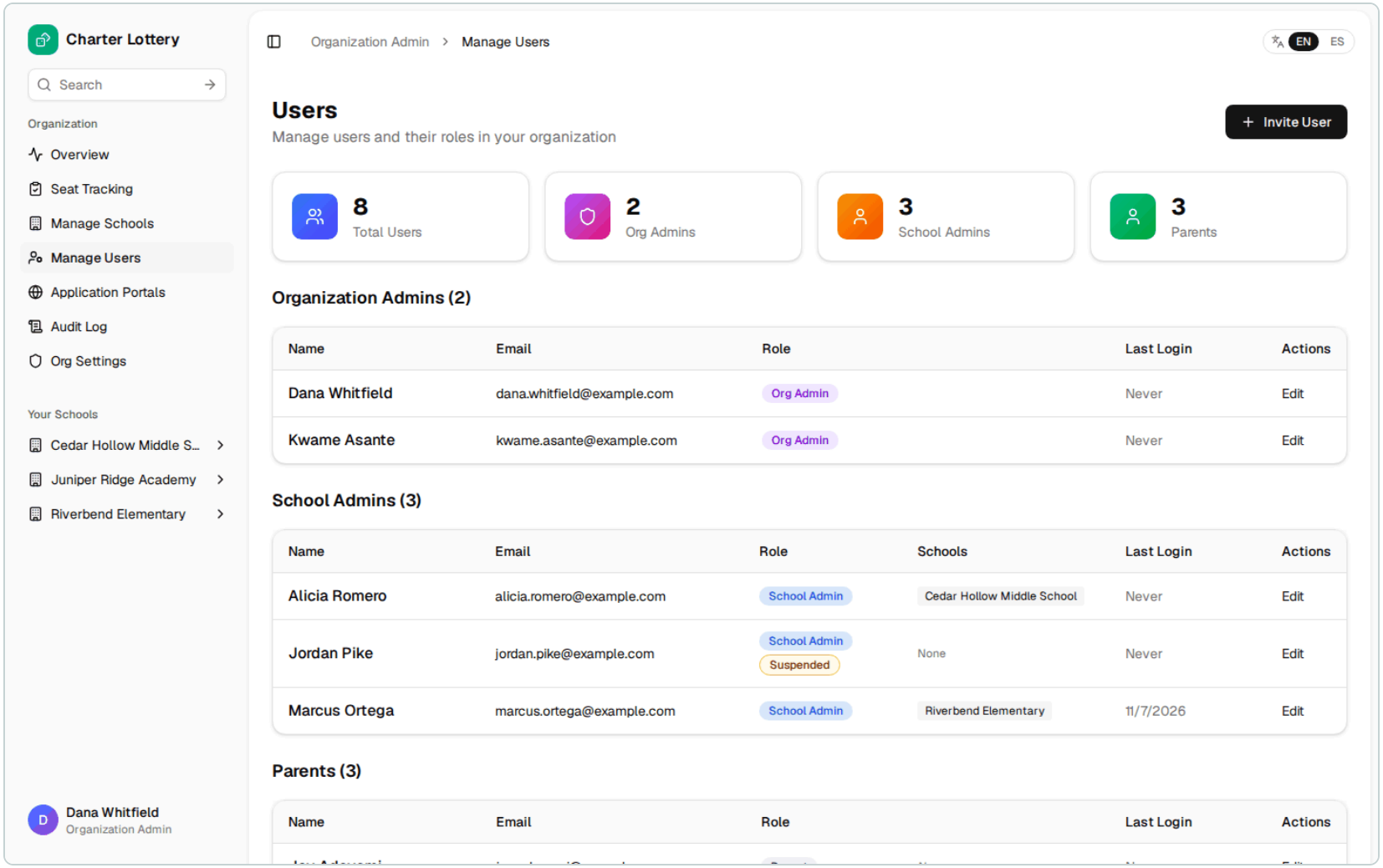
A school admin for Cedar Hollow Middle School.

Step 7. Invite another organization admin

Choose **Organization Admin** instead. An organization admin covers every school, the users, the settings, billing and the application, so there is no school list. Name at least two.



A second organization admin.

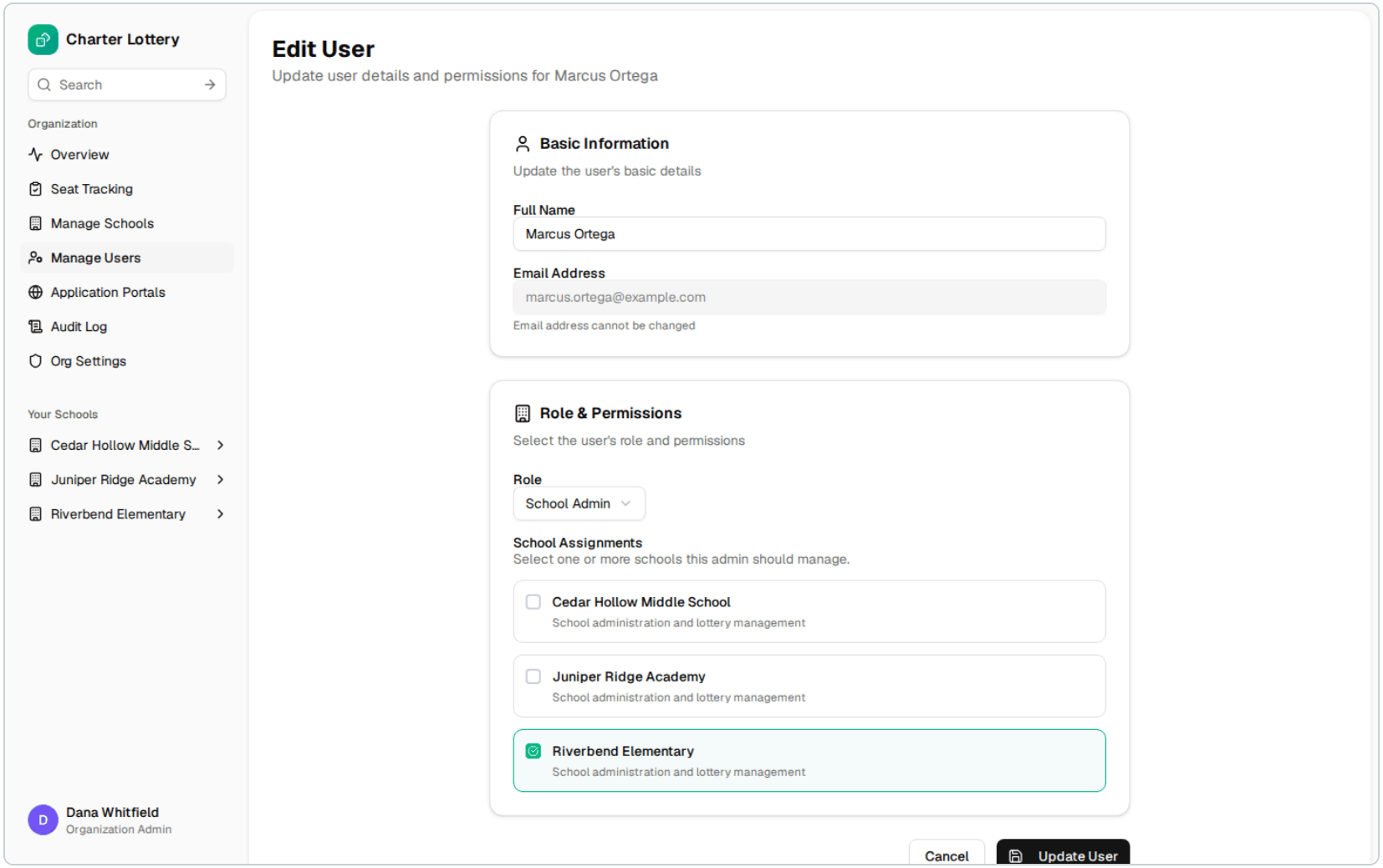


Both invitations in the list.

Step 8. Change someone's schools or role

Edit beside a person changes their name, role or schools. **Suspend account** signs a school admin out until you reinstate them.

School admins run their own schools' seasons. They cannot invite staff, change settings or portals, edit the application, or invalidate a draw.



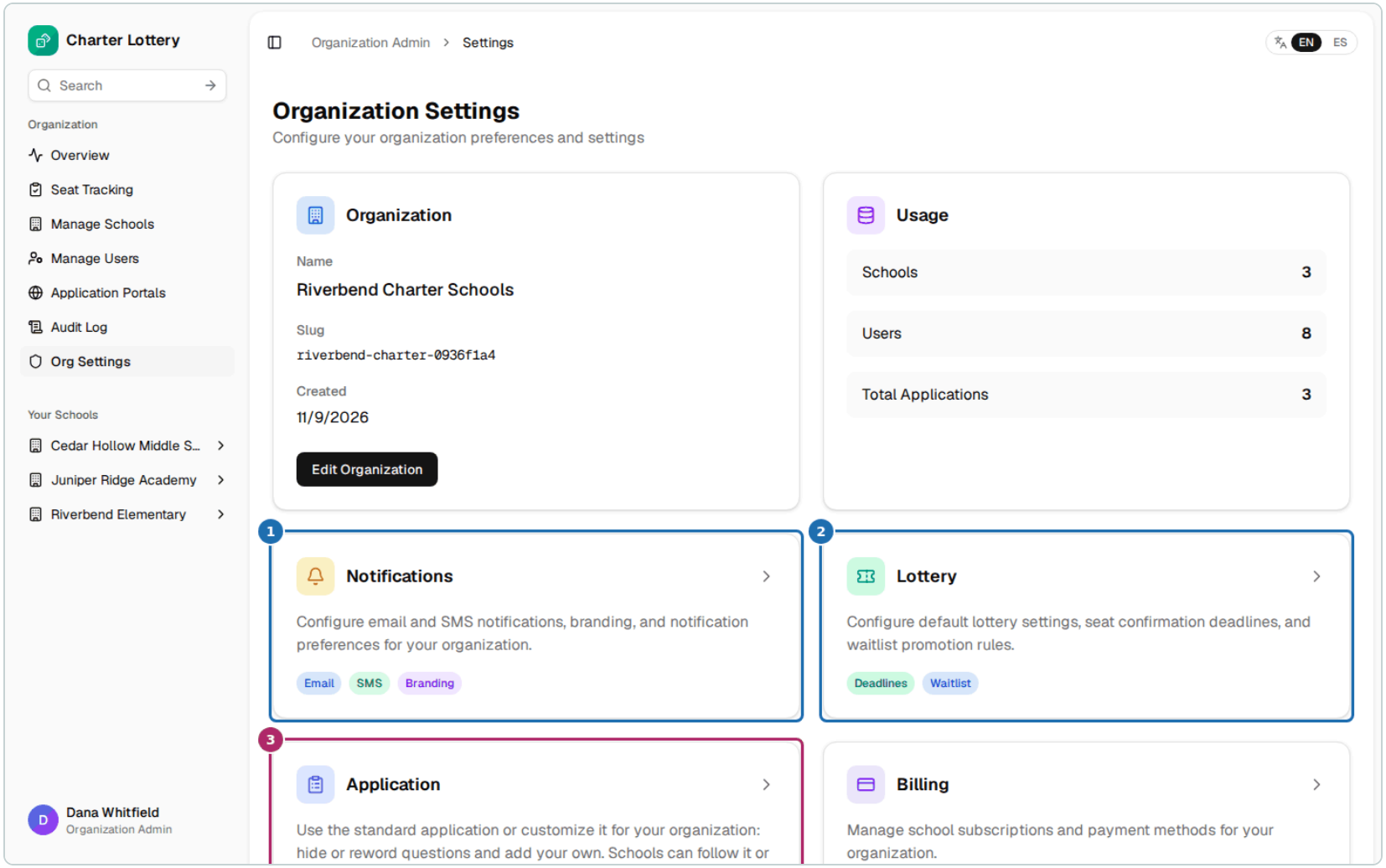
Marcus Ortega runs Riverbend Elementary.

PART 3

Settings that reach families

Step 9. Organization settings

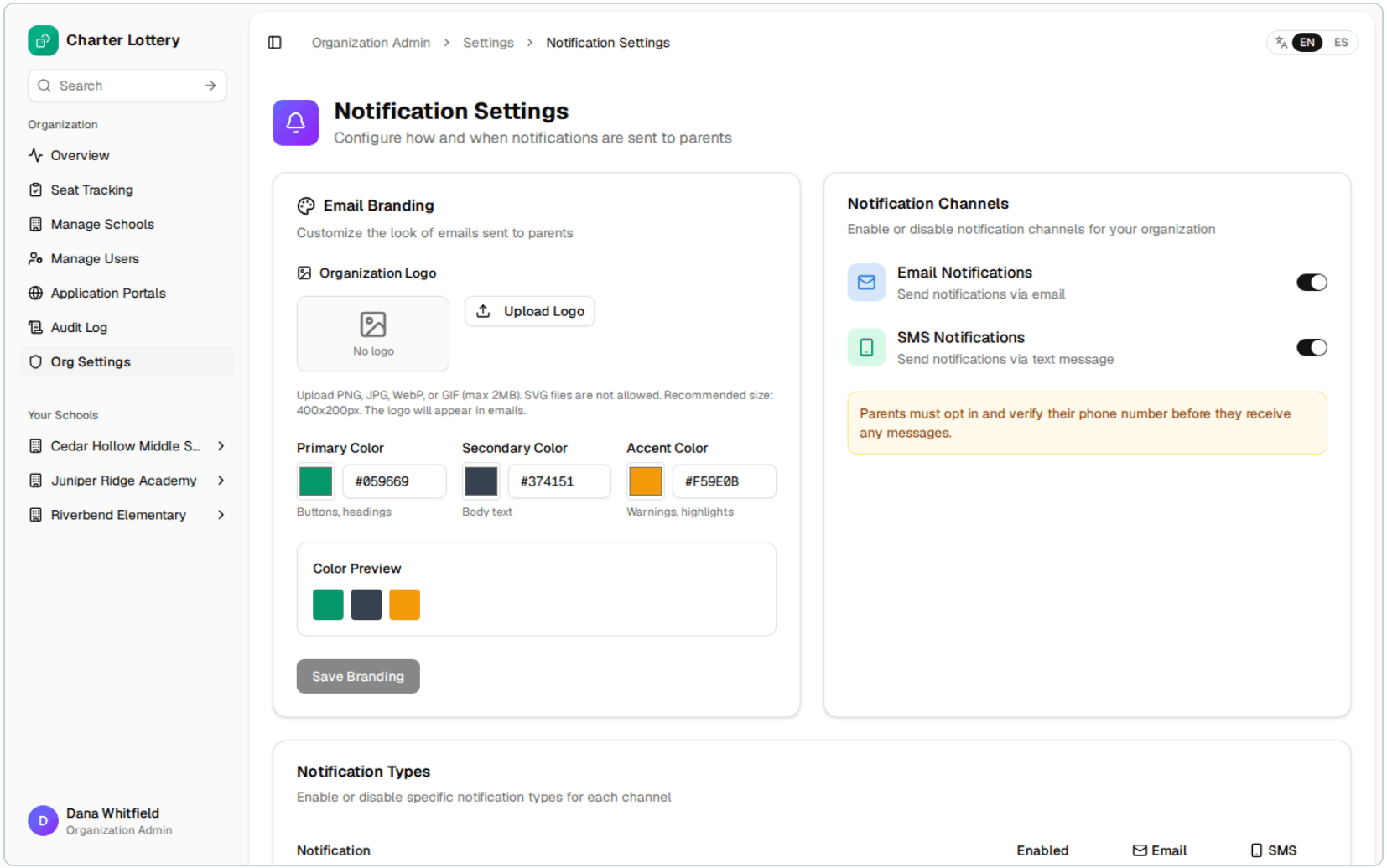
Org Settings links to **Notifications** (1), **Lottery** (2) and the **Application** (3), which most of this guide is about. Billing is there too: $999 per school per year, needed when a school runs its lottery.



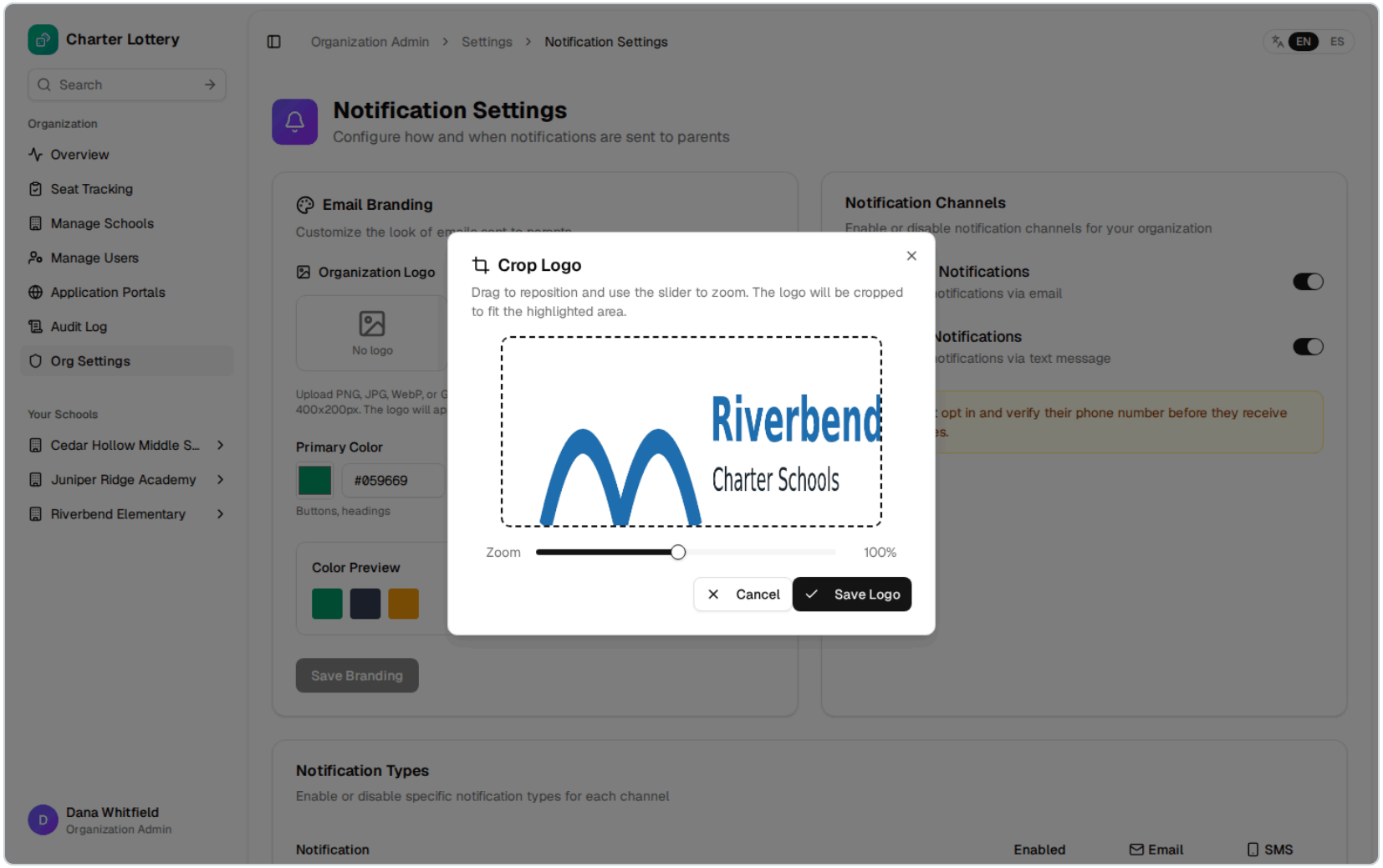
Organization Settings.

Step 10. Your logo and colors

Under **Notifications**, select **Upload Logo**. PNG, JPG, WebP or GIF up to 2 MB is accepted; SVG is not. Crop it to the box, select **Save Logo**, then set the colors and select **Save Branding**. The logo appears at the top of the emails families receive.



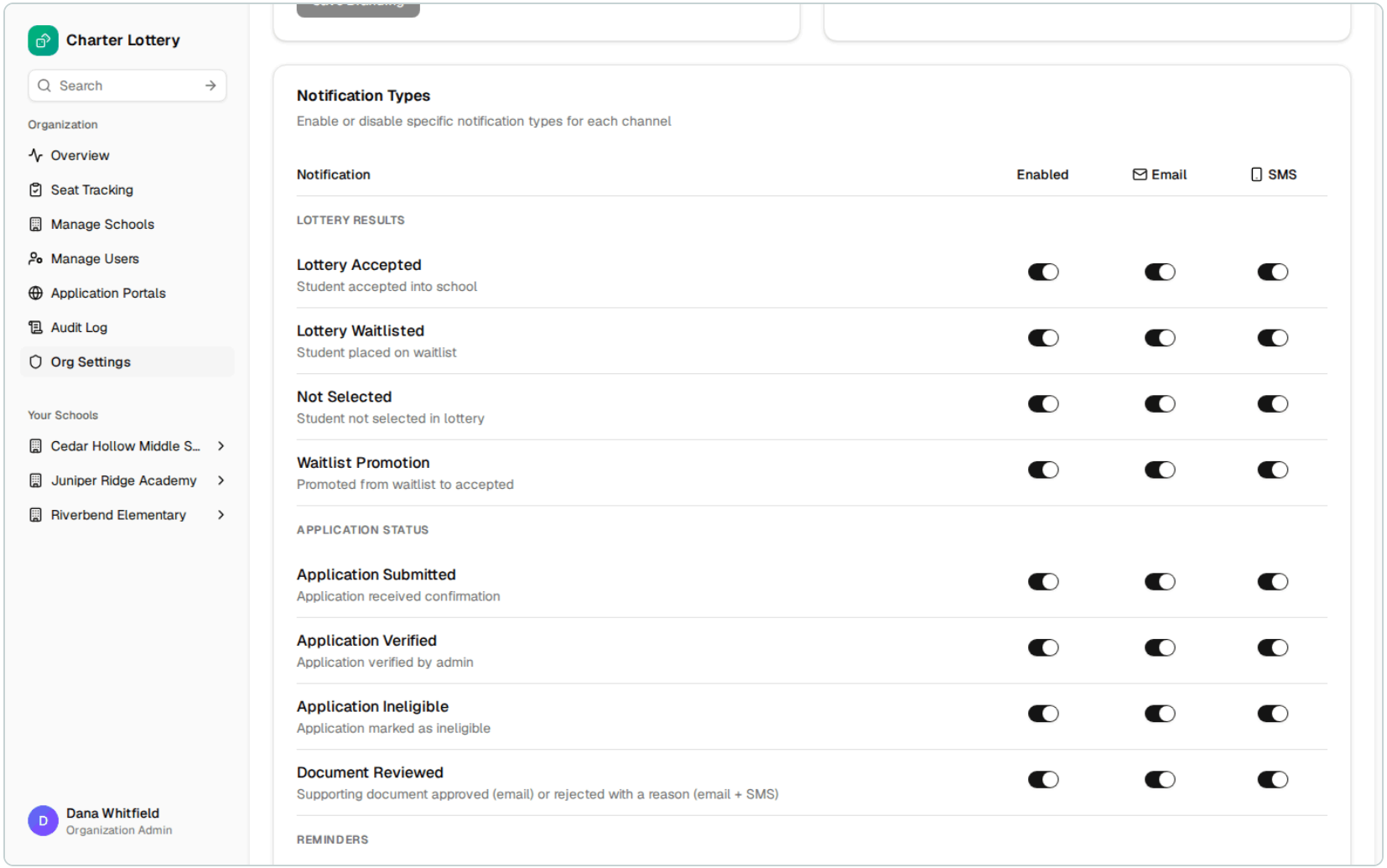
Email branding and channels.



Cropping a logo before it is saved.

Step 11. Which notices go out

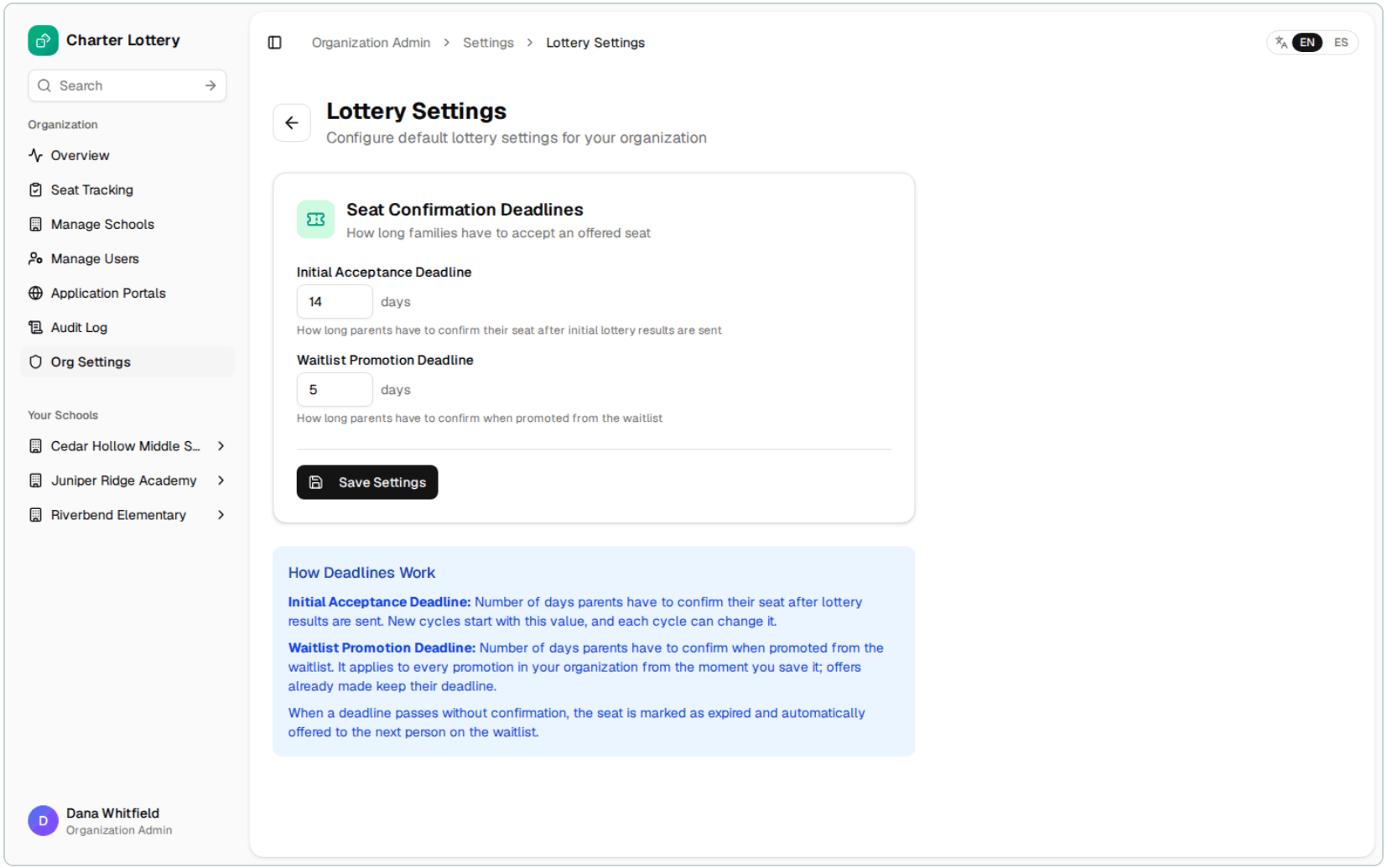
Turn email and text messages on or off for the organization, then choose each notice by channel. Families also have to verify a mobile number and agree before they get any text.



Each notice by channel.

Step 12. Lottery defaults

Set how long families have to accept a first offer and how long they have when promoted from the waitlist. Each new cycle starts with the first value and can change it; the second applies to every promotion.



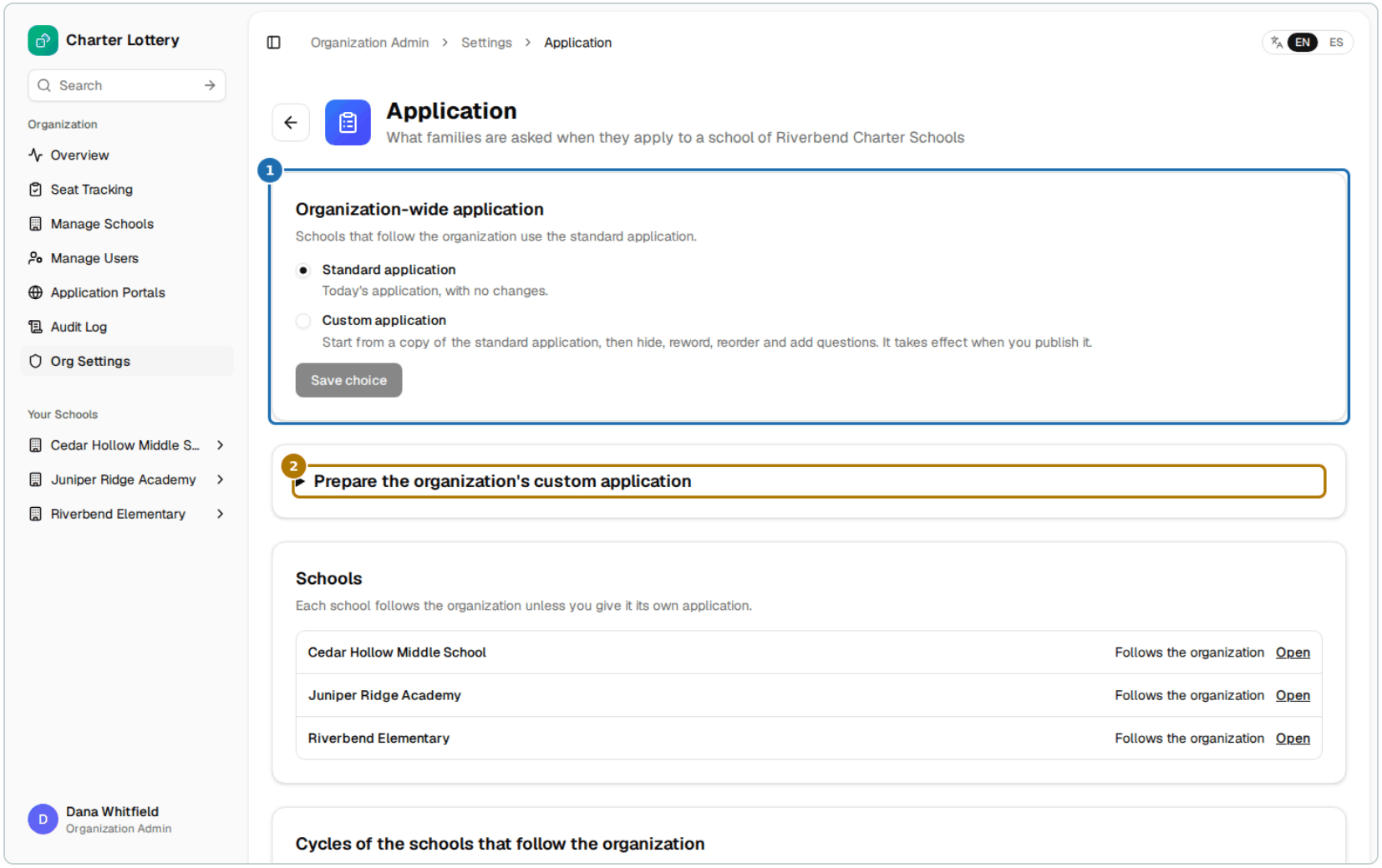
Seat confirmation deadlines.

PART 4

Build your application

Step 13. Open the Application page

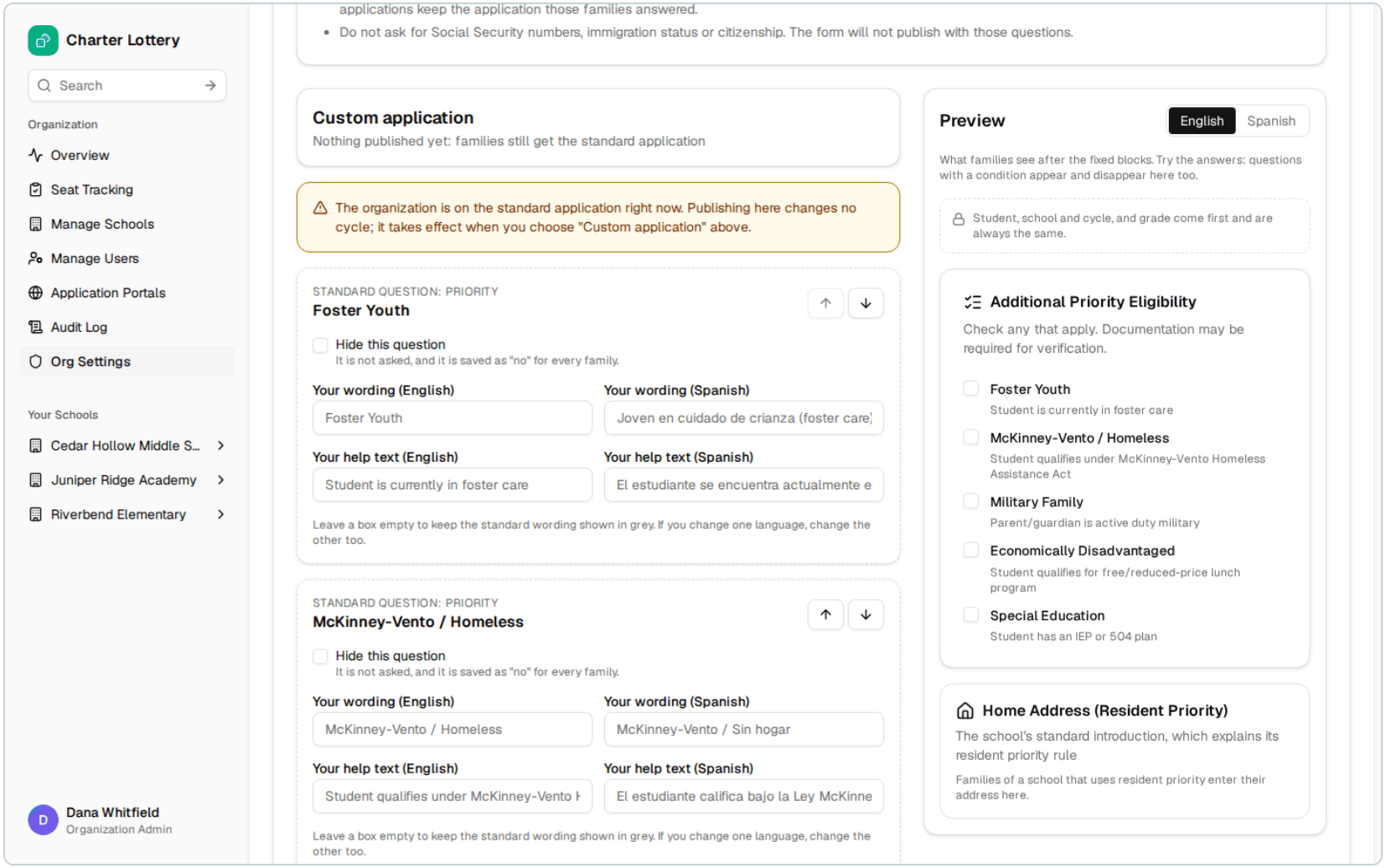
Choose **Org Settings → Application**. Every organization starts on the **Standard application** (1); **Custom application** starts from a copy of it. **Prepare the organization's custom application** (2) builds and publishes it while schools keep the standard one. This guide does that, then switches.



The organization on the Standard application.

Step 14. Start from the standard copy

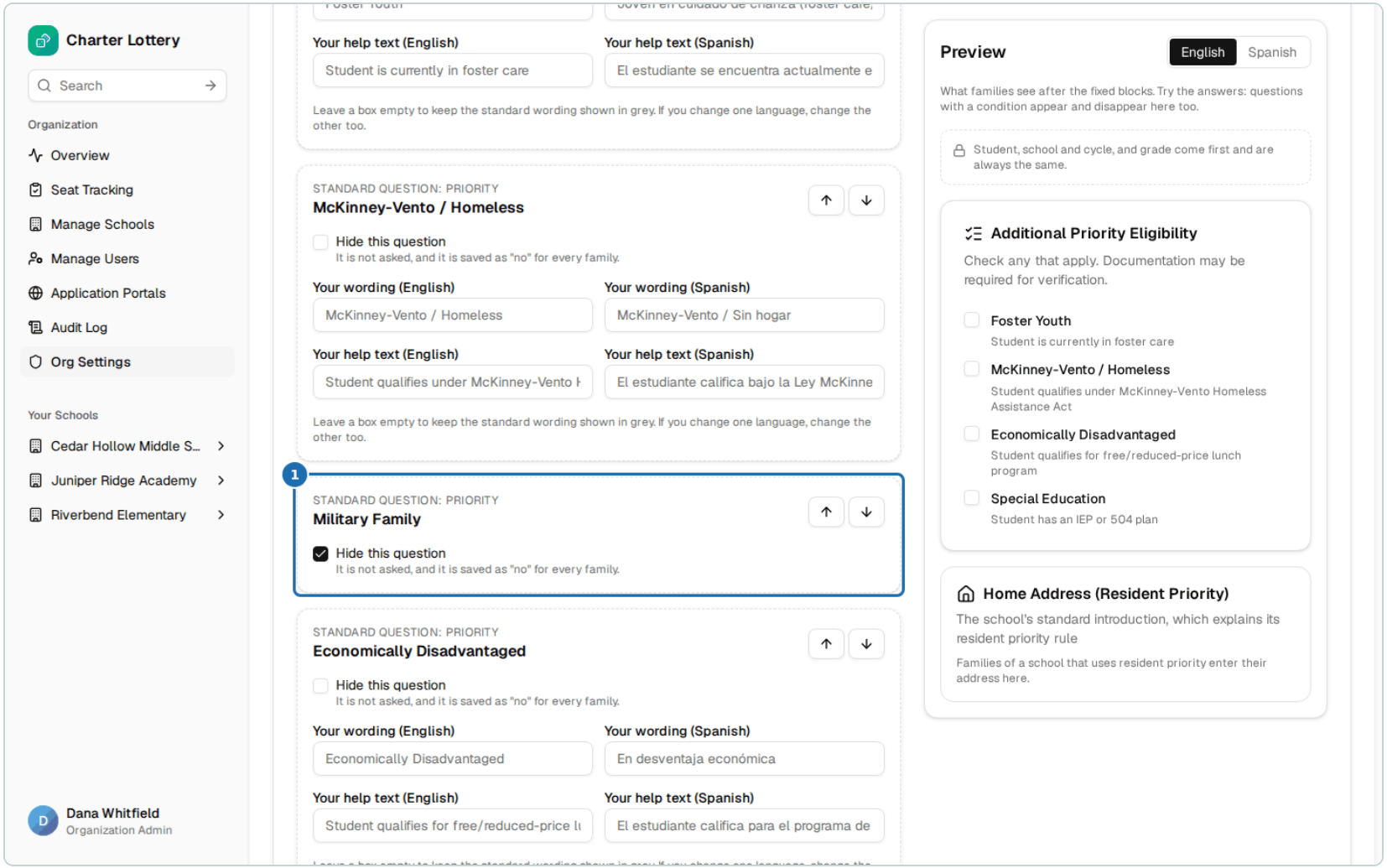
Open **Prepare the organization's custom application**. The editor lists the five priority questions and the address block, with a live **Preview**. Student, school and cycle, and grade always come first and cannot change. The amber note confirms no cycle changes yet.



The starting copy and its preview.

Step 15. Hide a priority question

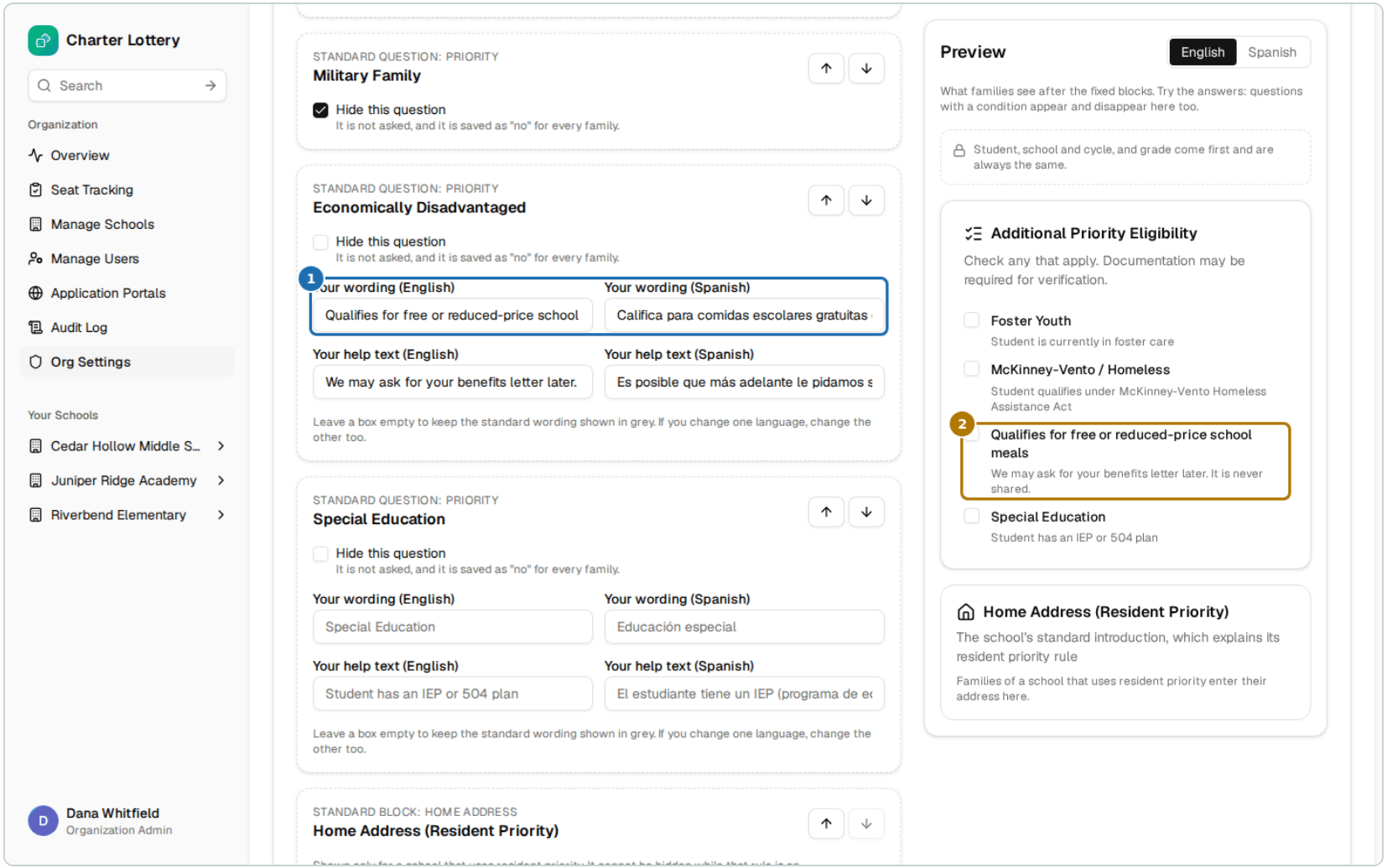
Tick **Hide this question** on a priority no school gives a weight to, here **Military Family** (1). It disappears from the preview. It is not asked and is saved as "no" for every family; staff can still set it with an audited priority override.



Military Family hidden.

Step 16. Reword a standard question

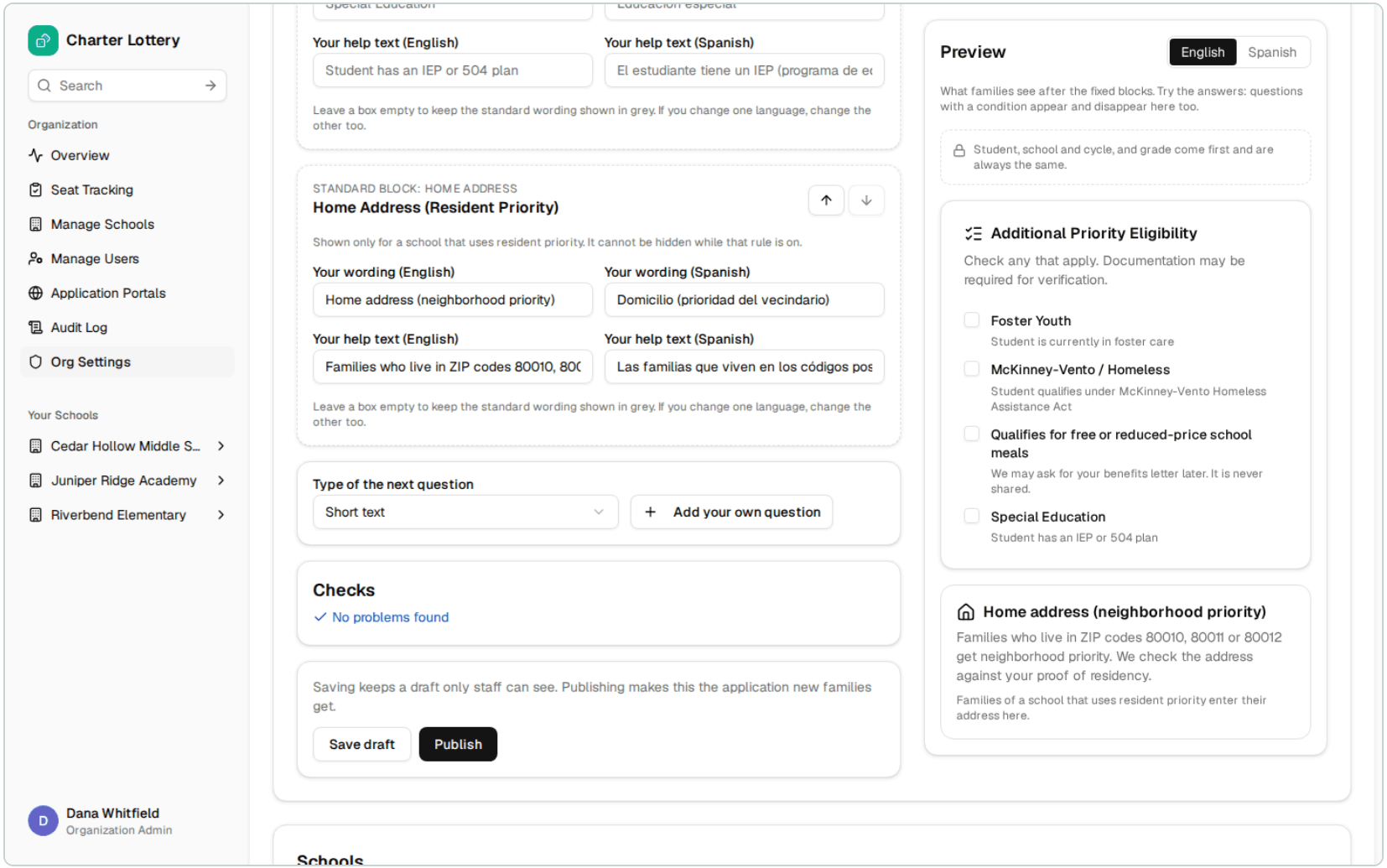
Type your wording in English and Spanish (1). The preview (2) shows it at once. Leave a box empty to keep the standard wording shown in grey, and change both languages together.



Economically Disadvantaged, in plainer words.

Step 17. Reword the home address block

The address block appears only at schools that use resident priority, and it cannot be hidden while that rule is on. You can give it your own title and introduction in both languages, for example naming the qualifying ZIP codes.

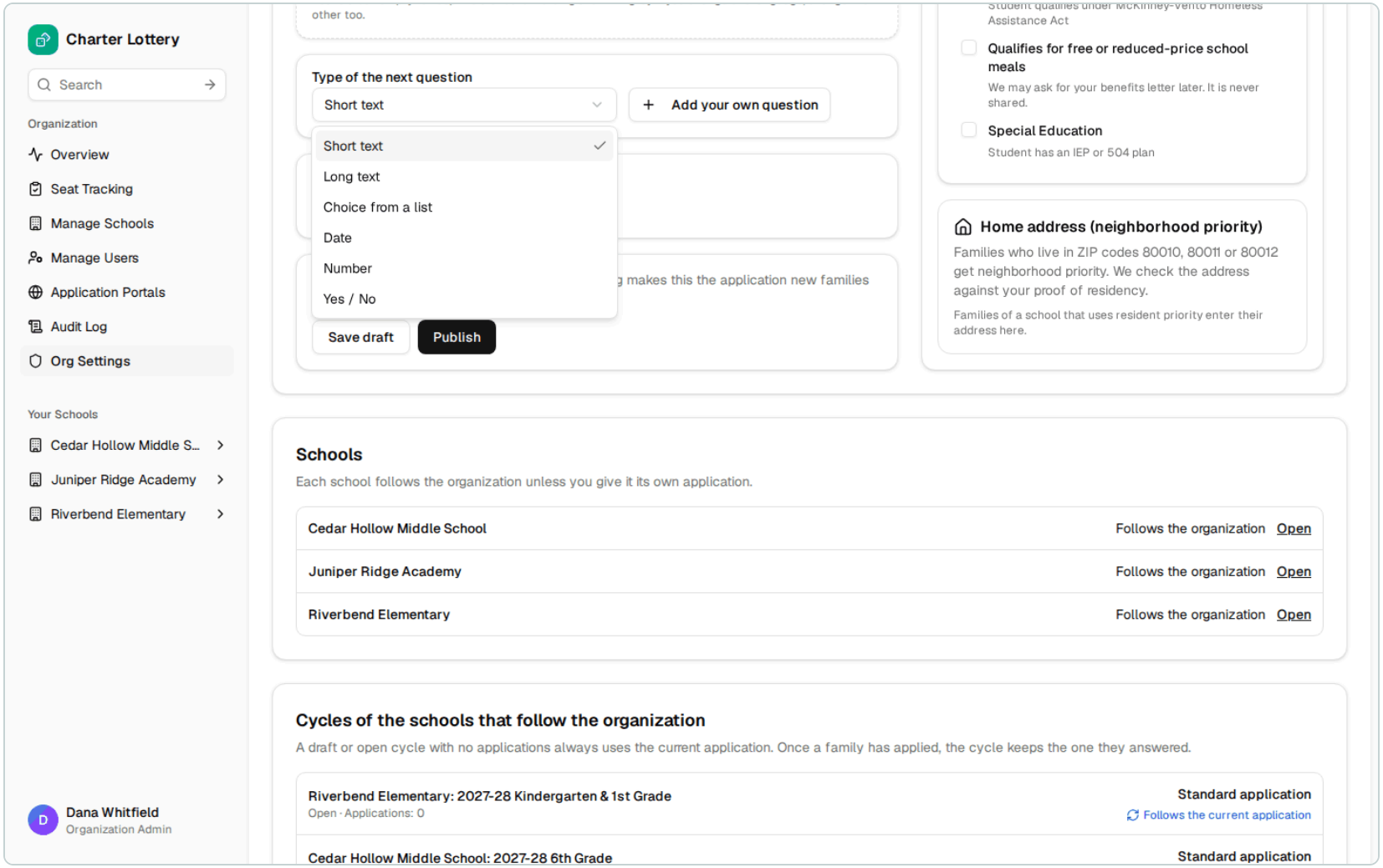


The address block's own title and introduction.

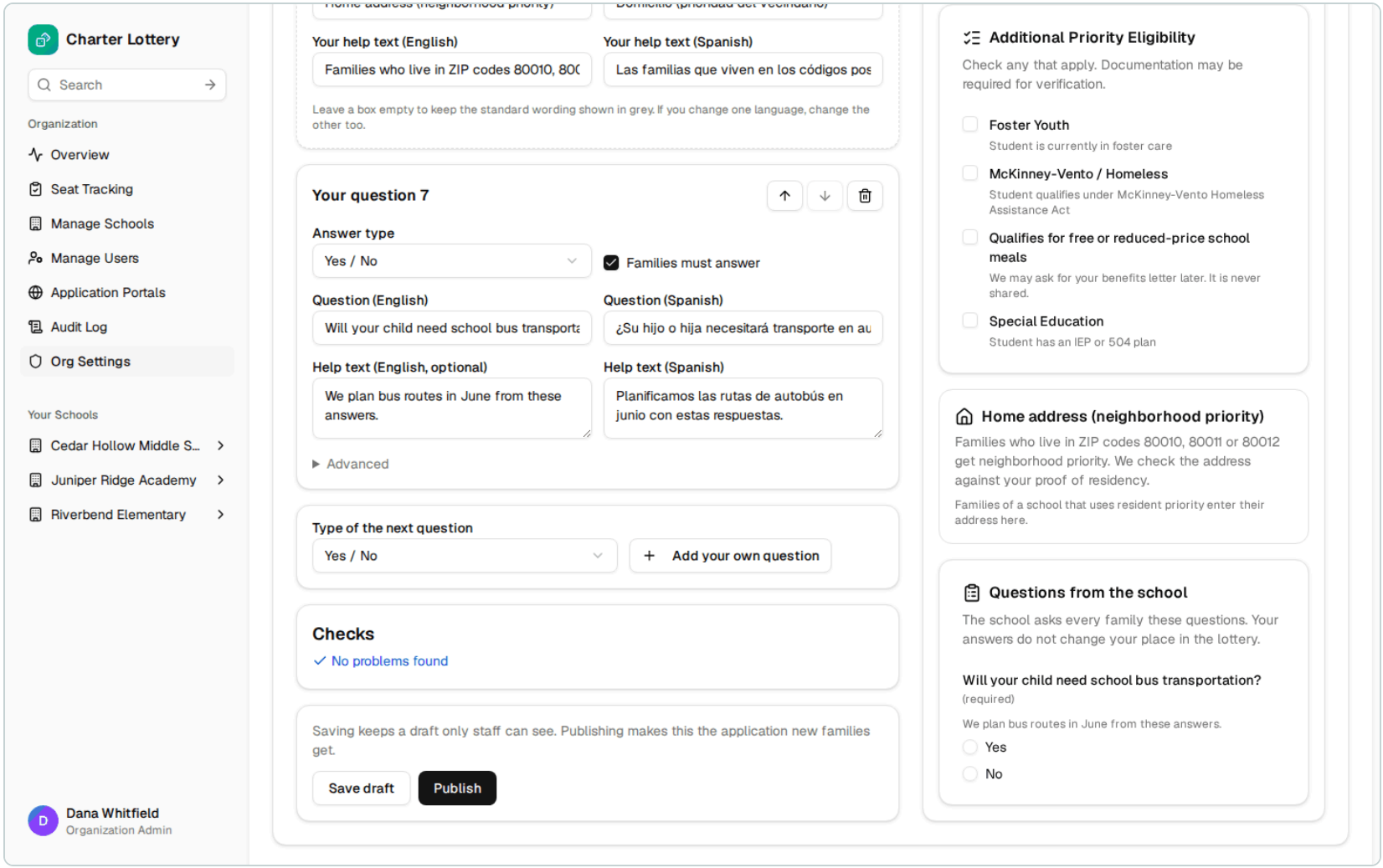
Step 18. Add your own question

Choose the **Type of the next question**: short text, long text, choice from a list, date, number or yes / no. Select **Add your own question**.

Write the question and its help text in English and Spanish. Tick **Families must answer** to make it required.



The six answer types.

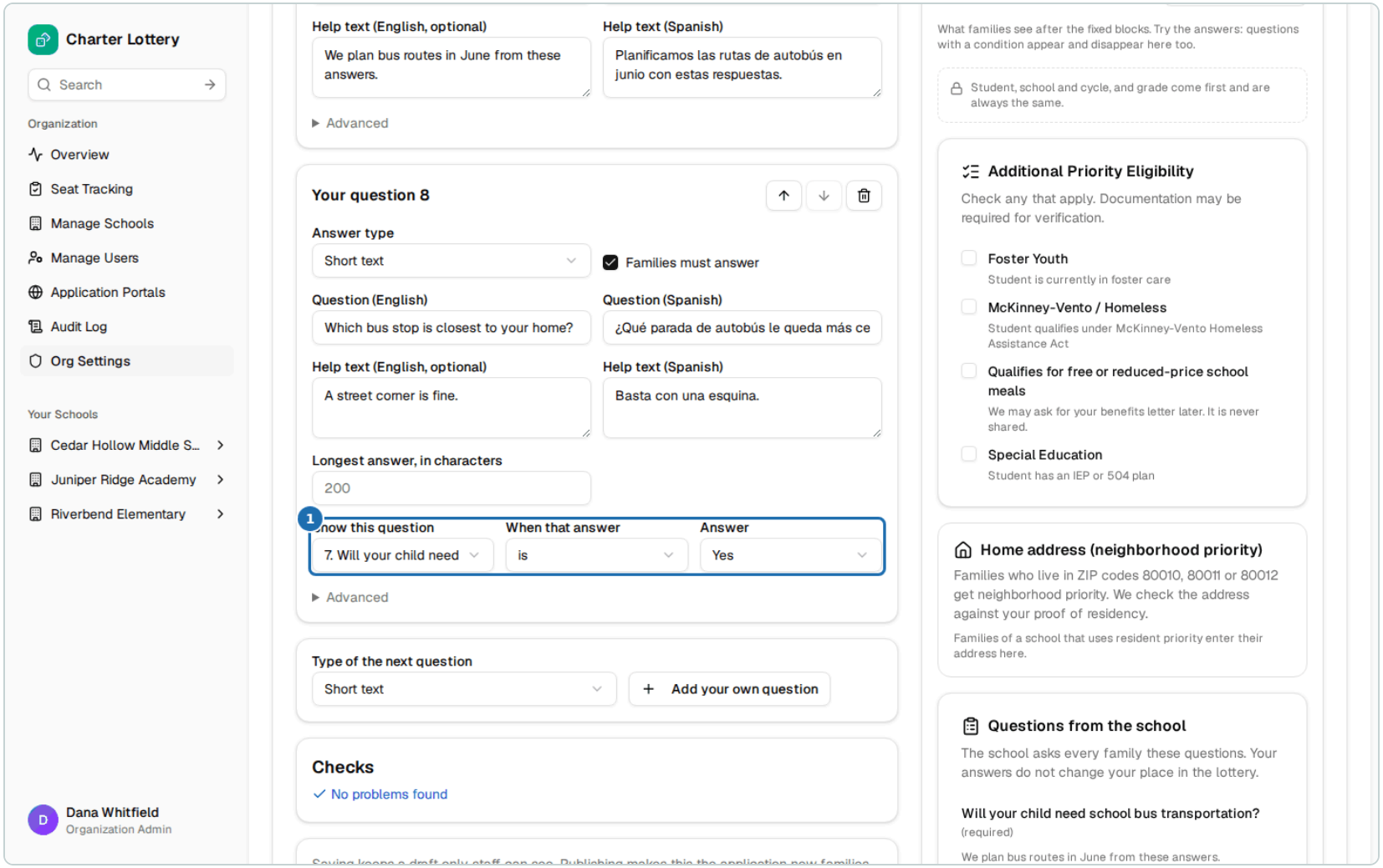


A required yes / no question.

Step 19. Add a follow-up question

Under **Show this question**, pick an earlier question, then the answer that shows it (1). Here the bus-stop question appears only when a family answers **Yes** to bus transportation.

A condition can use only your own earlier questions, not a priority checkbox.

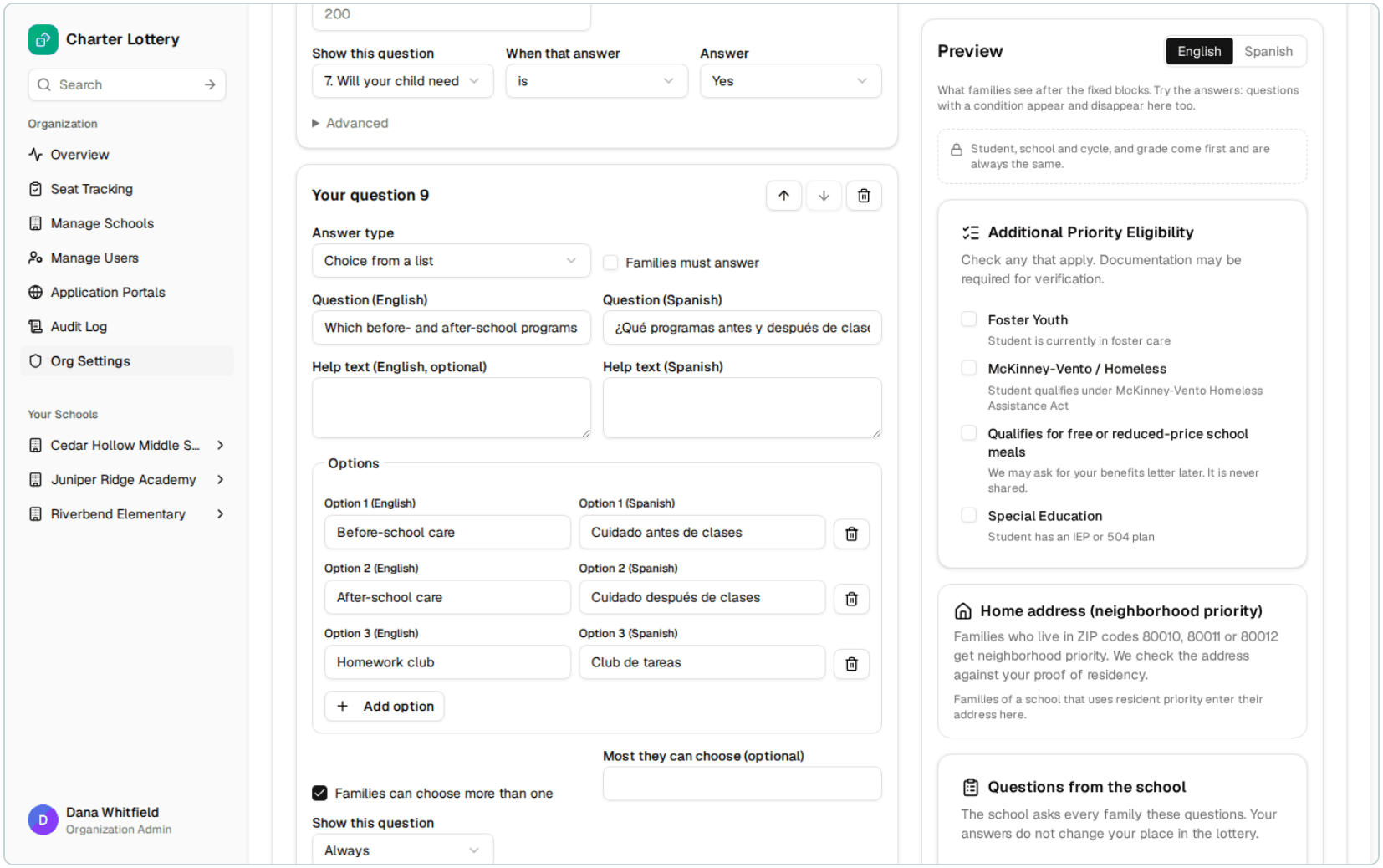


Shown only when the bus answer is Yes.

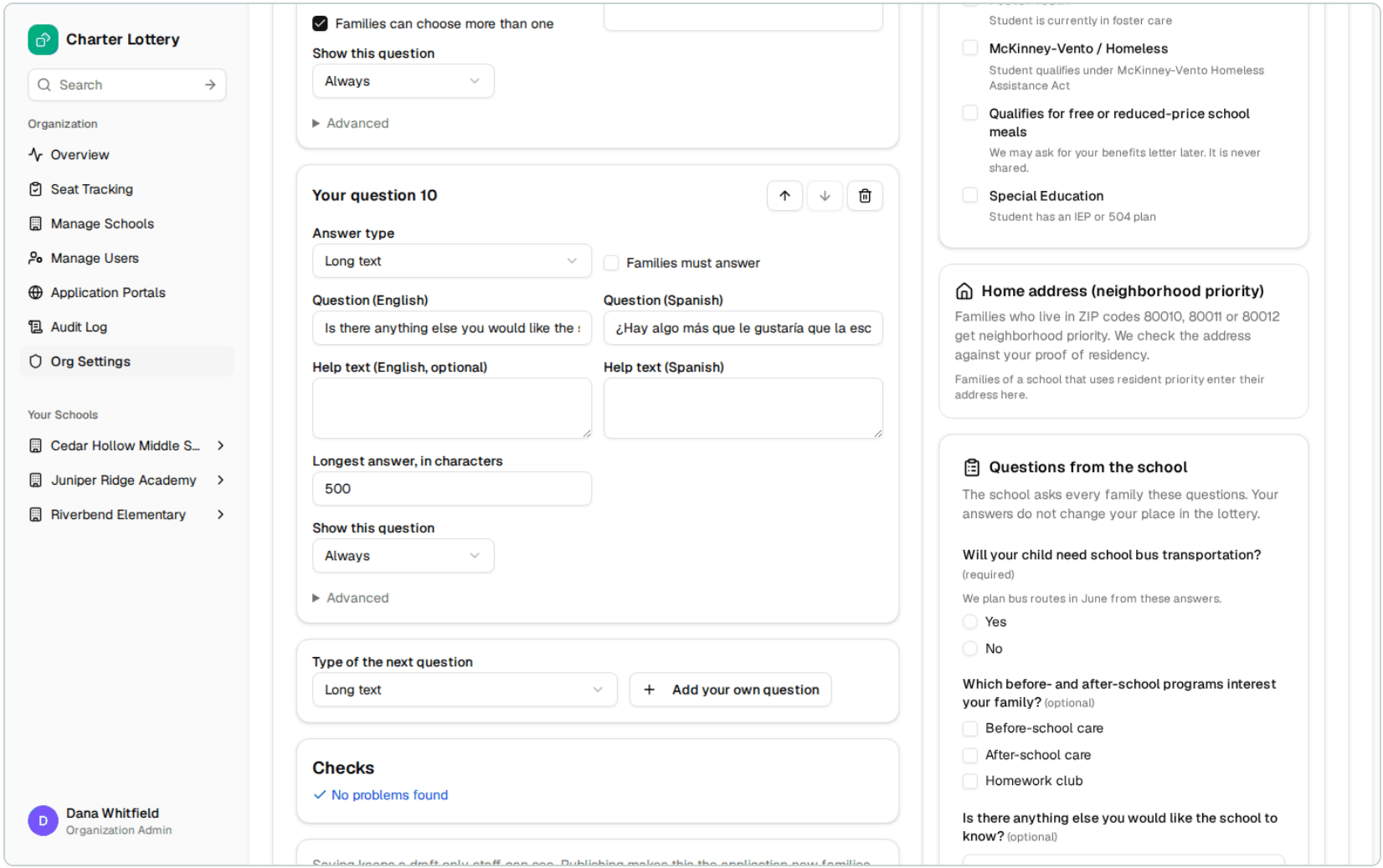
Step 20. Lists, long answers and limits

Each option of a **Choice from a list** needs English and Spanish text; tick **Families can choose more than one** if needed. Text, numbers and dates take limits.

Advanced → Export column ID names the question in exports. Avoid changing it after publishing.



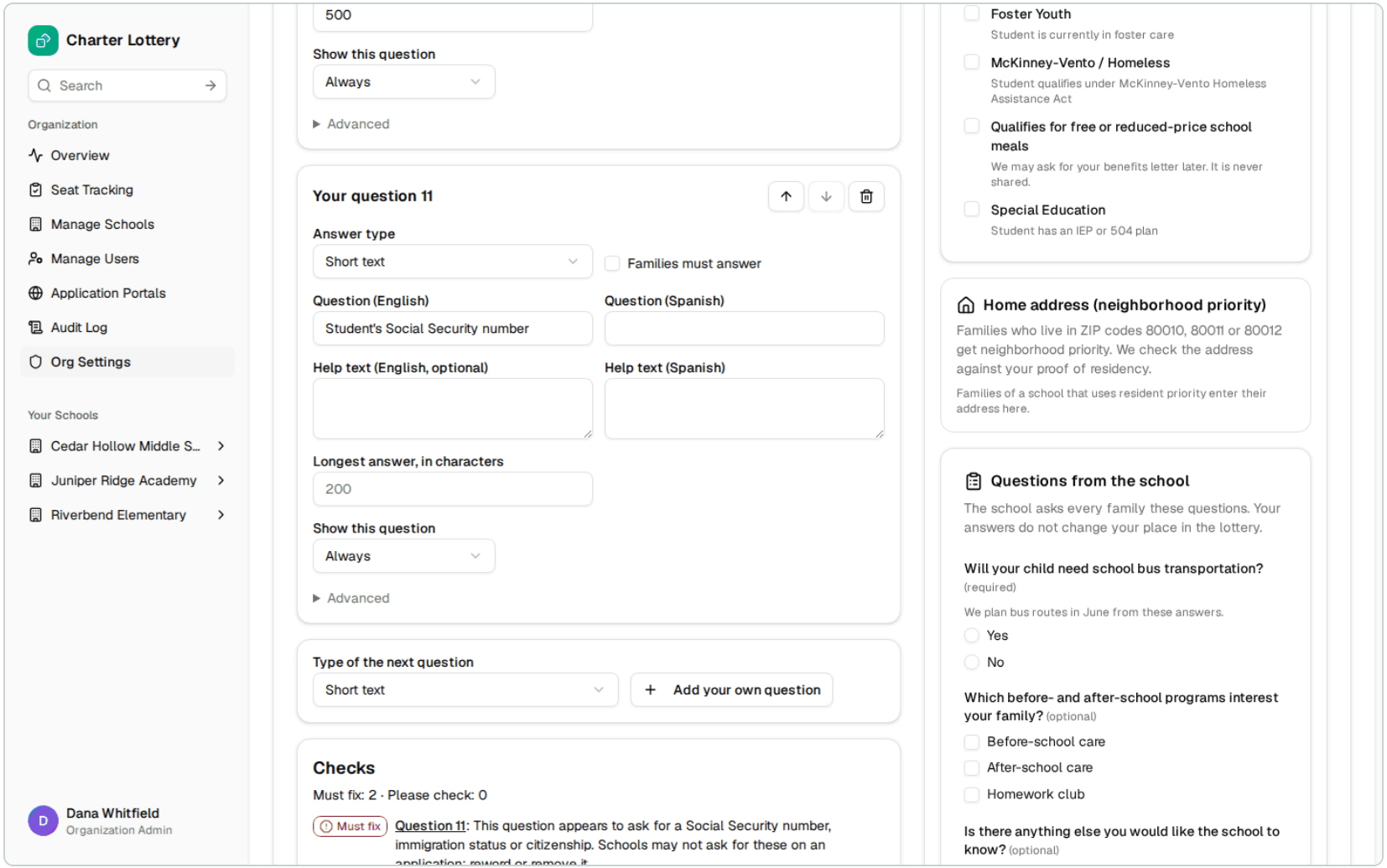
A multiple choice with three options.



An optional long answer, up to 500 characters.

Step 21. Let the checks guide you

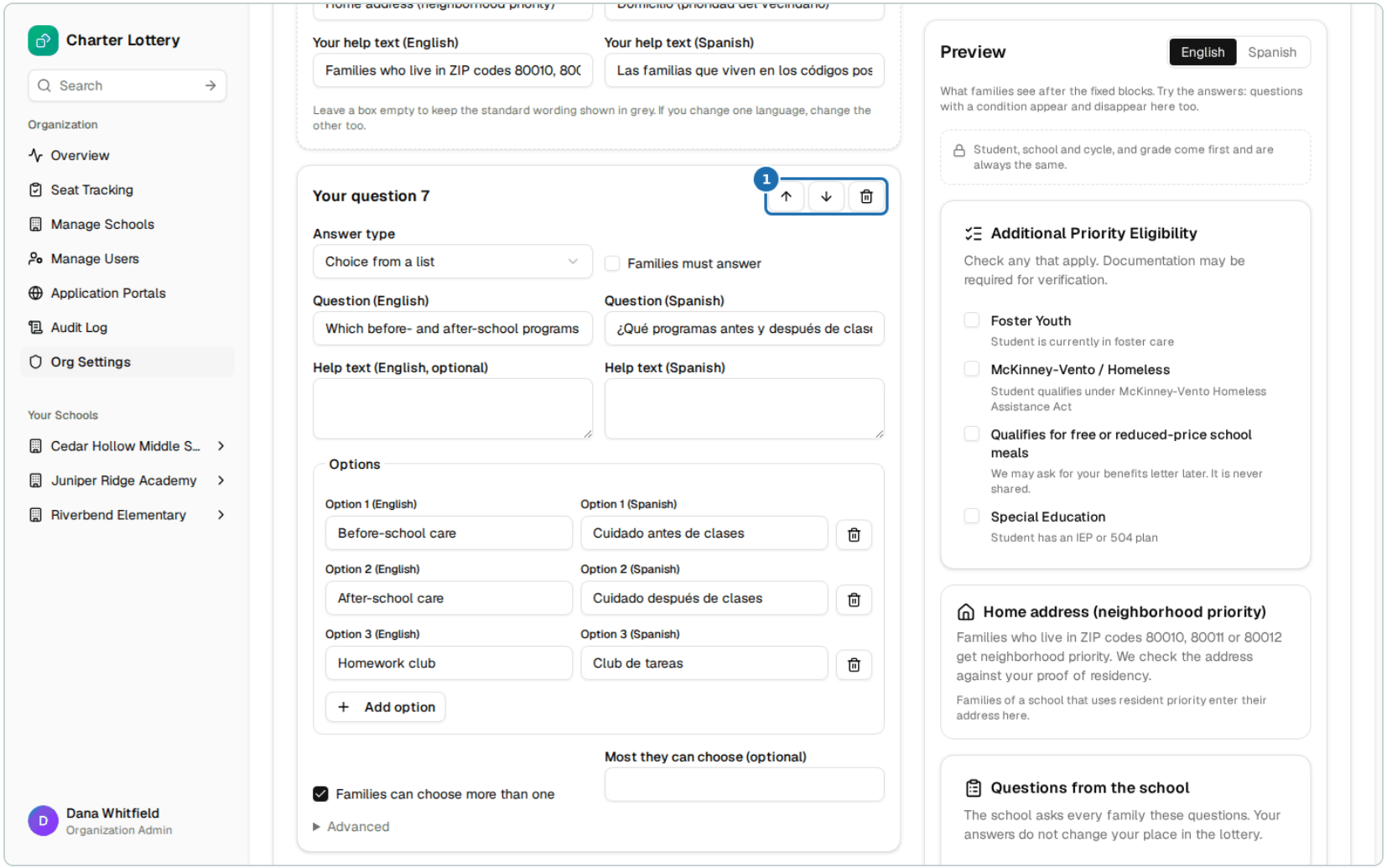
Checks lists anything to fix. **Must fix** blocks publishing; **Please check** is a warning, such as a missing Spanish translation. Here a question asking for a Social Security number is refused, so it is removed with the bin button.



A question the form will not publish.

Step 22. Change the order

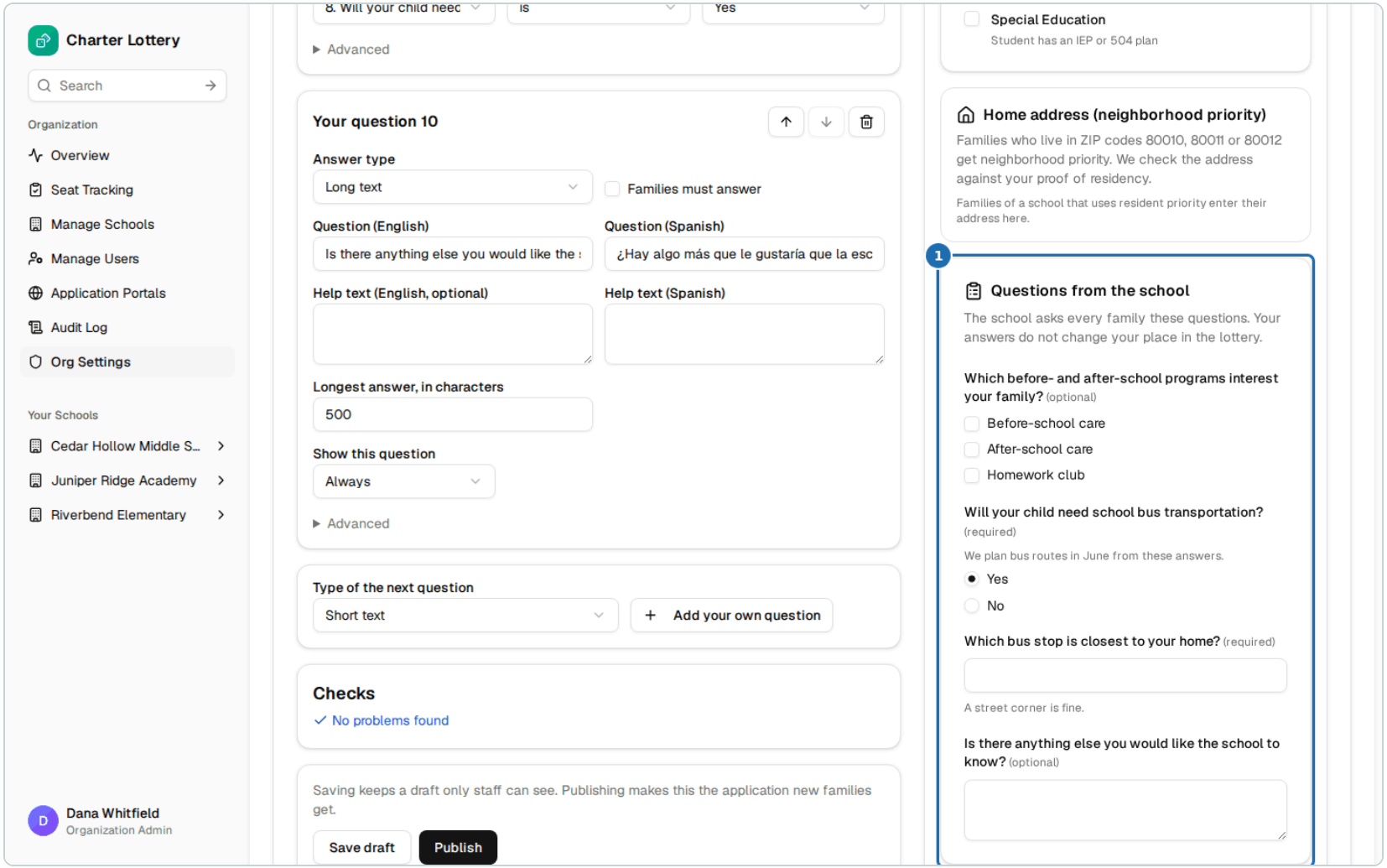
Use the arrows (1) to move any card up or down, standard ones included. Here the programs question now comes before the bus questions. A follow-up must stay below the question it depends on.



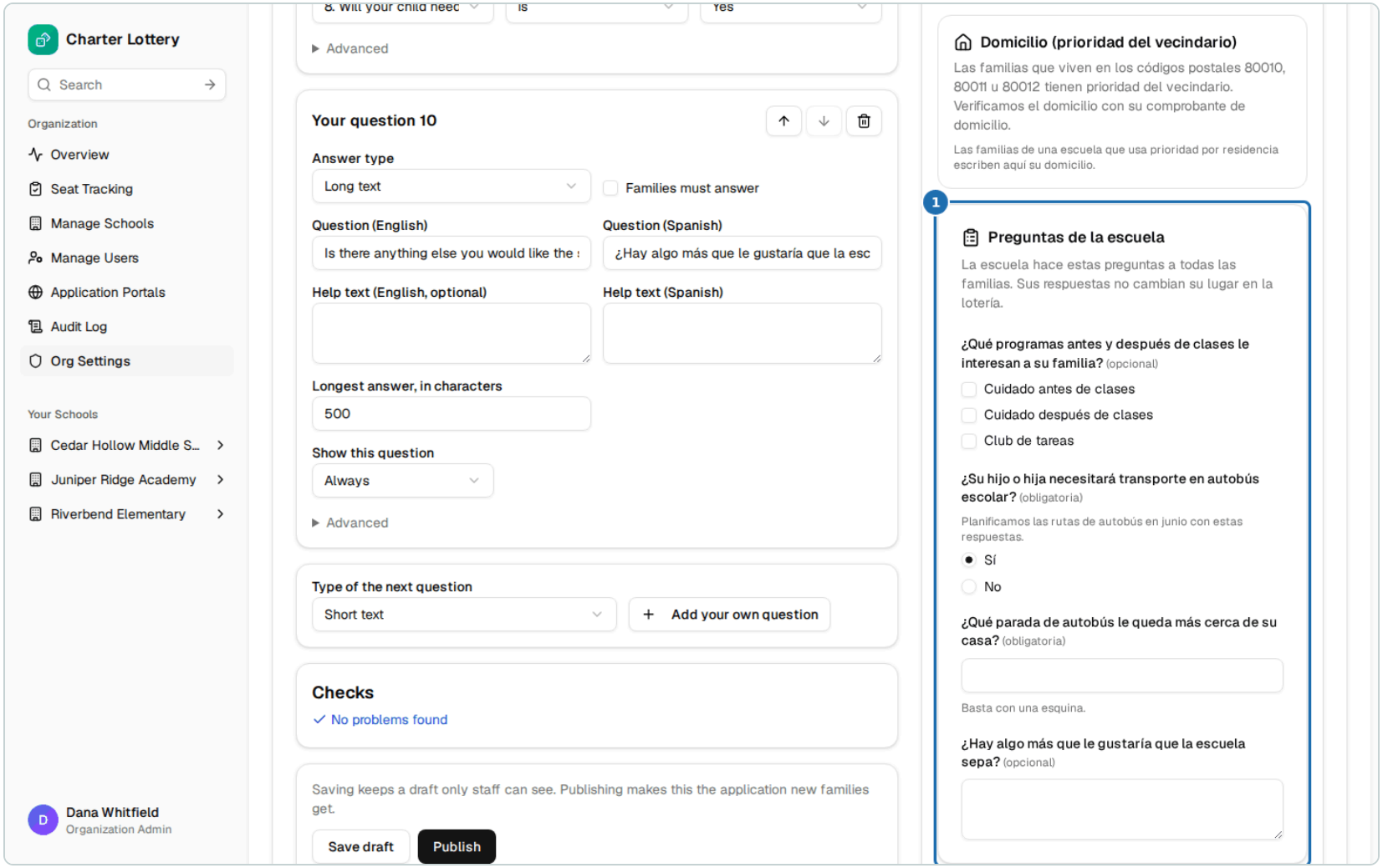
The programs question moved up.

Step 23. Preview in English and Spanish

The preview is what families see after the fixed blocks, and its answers work: choosing **Yes** shows the bus-stop question (1). Select **Spanish** to read it in Spanish. Nothing typed in the preview is saved.



The questions in English.

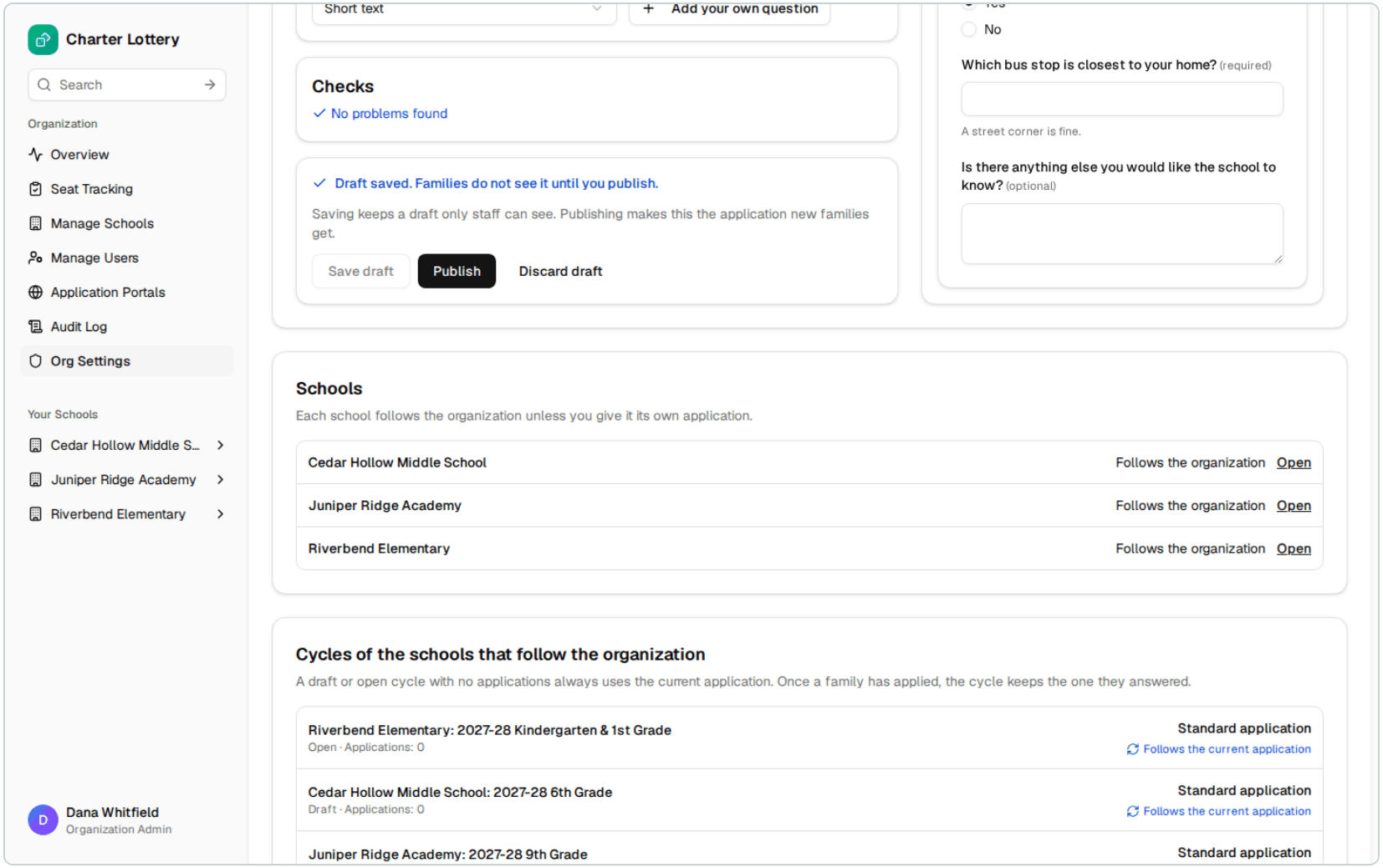


The same questions in Spanish.

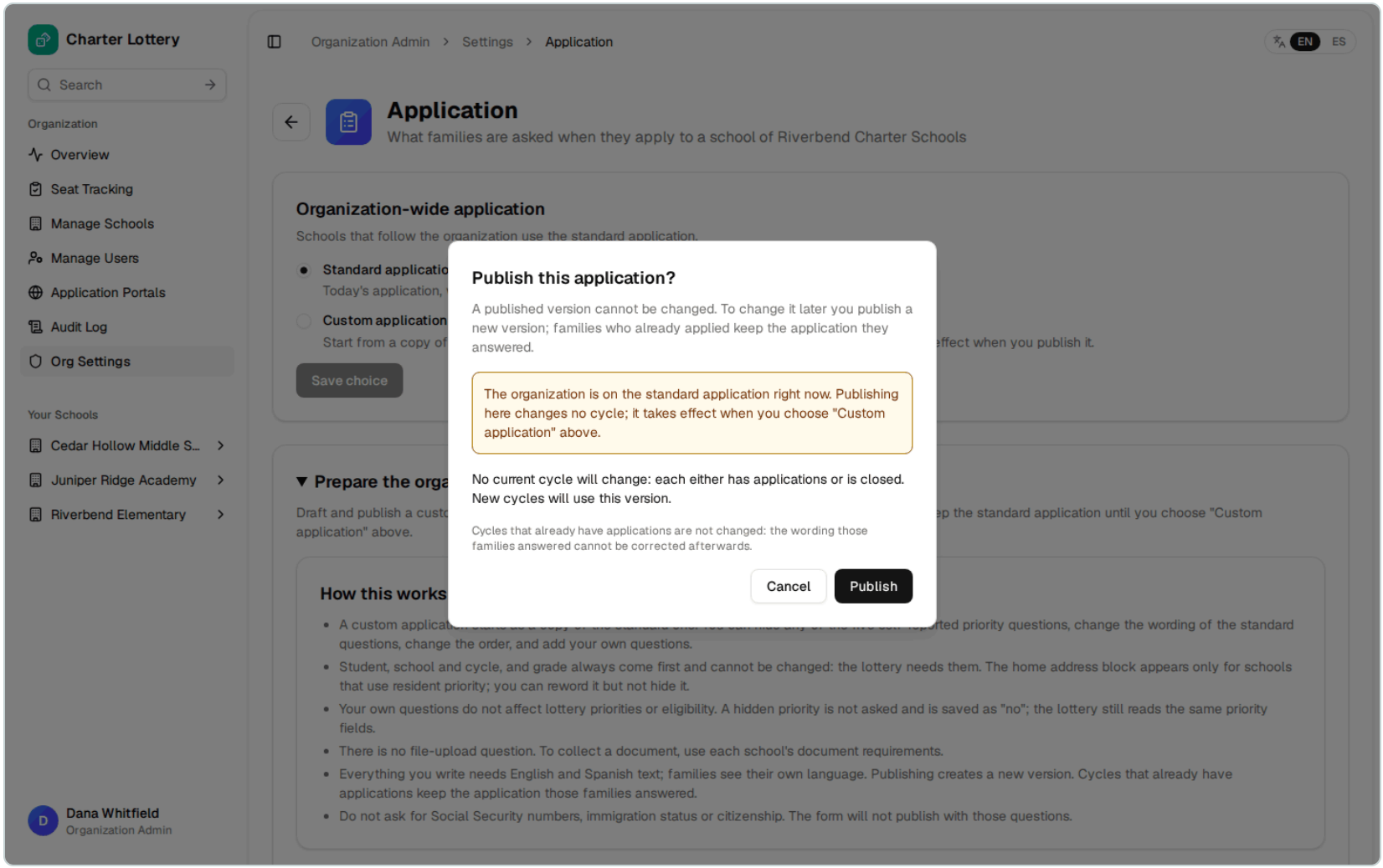
Step 24. Save a draft, then publish

Save draft keeps your work where only staff can see it. **Publish** creates version 1. **A published version cannot be changed**: to change it later you publish version 2.

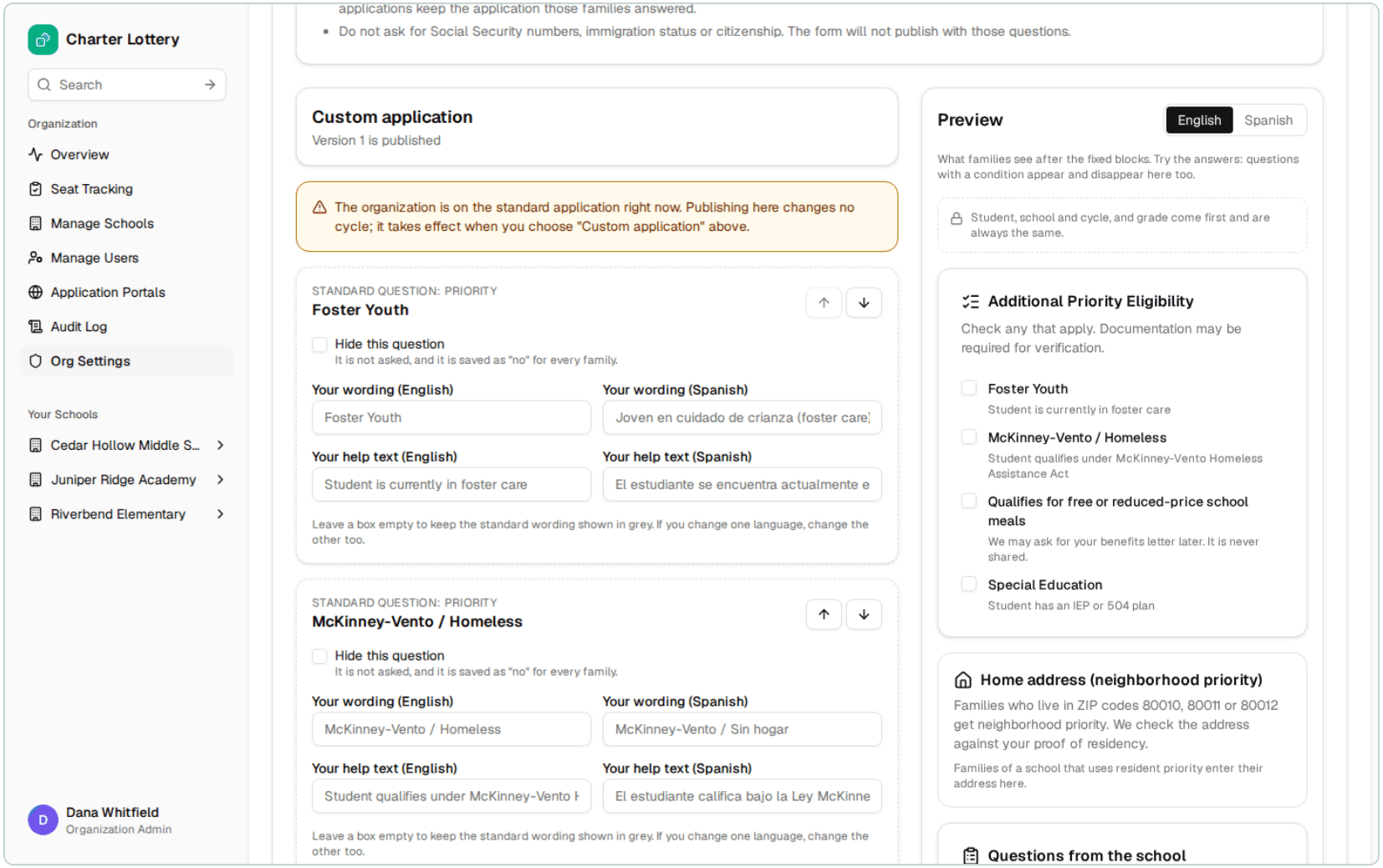
While the organization is on Standard, the confirmation says no cycle will change.



Draft of version 1, saved.



Publishing while still on Standard.

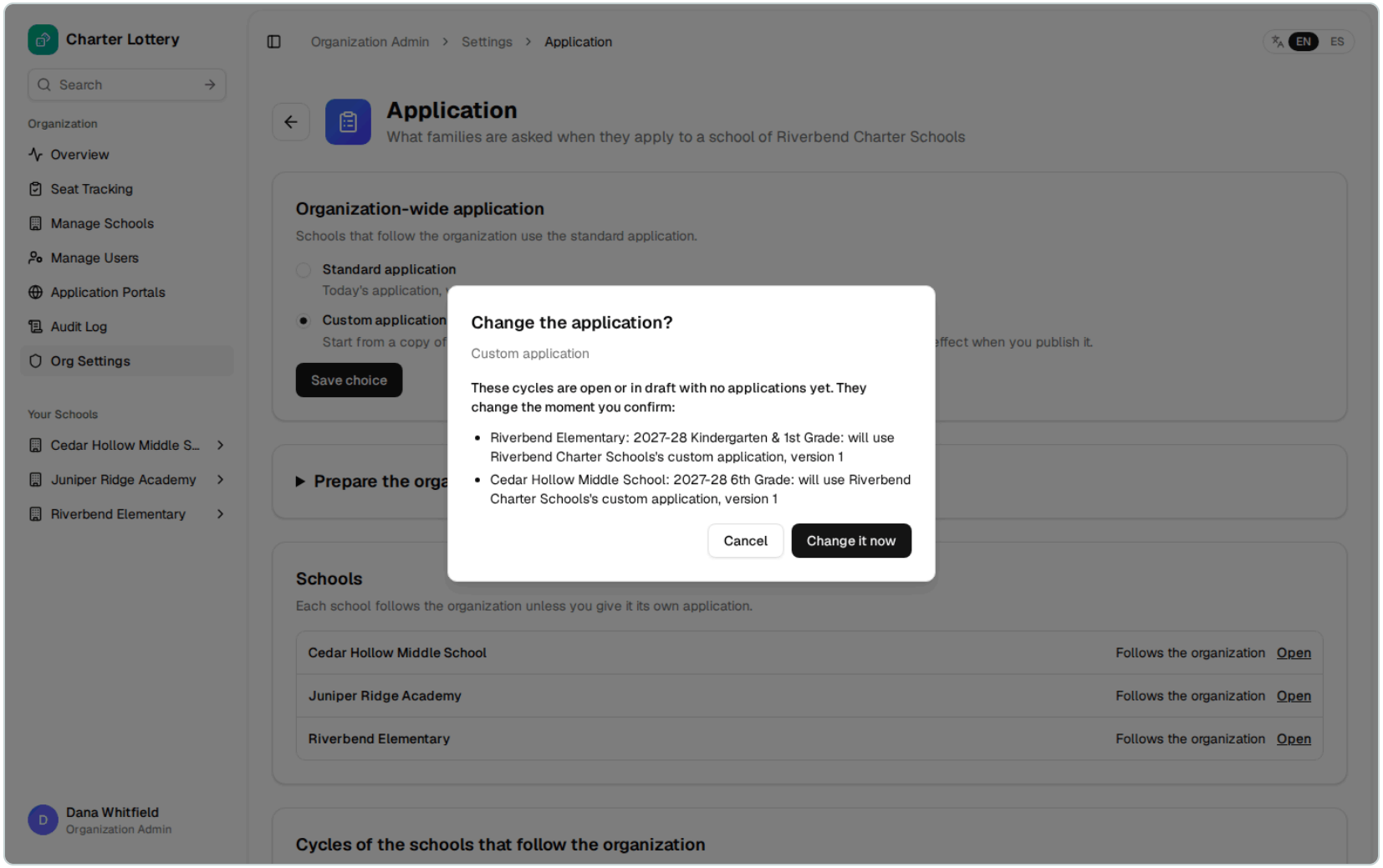


Version 1 is published.

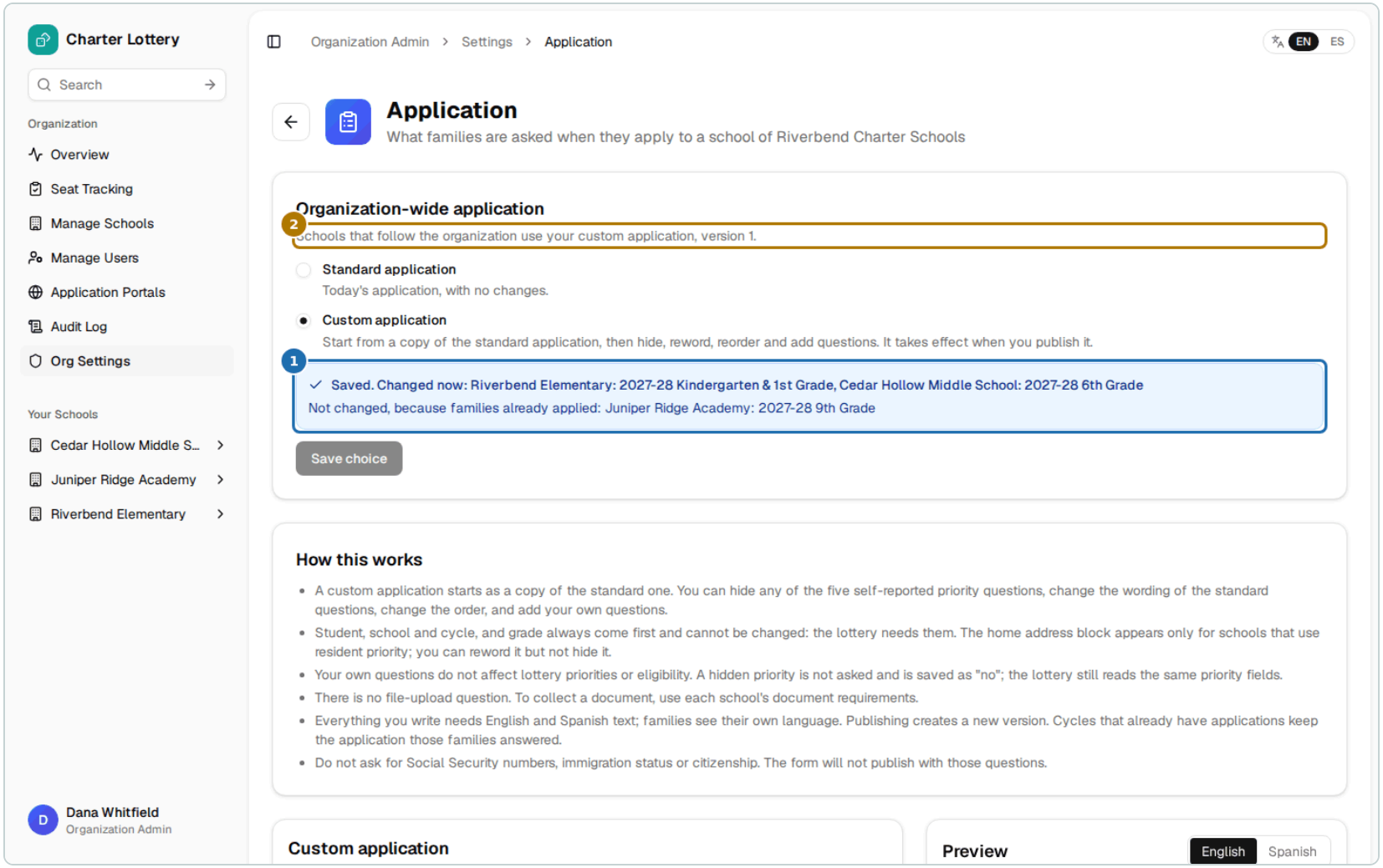
Step 25. Switch the organization to Custom

Select **Custom application**, then **Save choice**. The dialog lists each open or draft cycle with no applications; they change when you select **Change it now**.

The result (1) also names cycles kept because families applied. The line under the heading (2) now names version 1.



The cycles that will change.

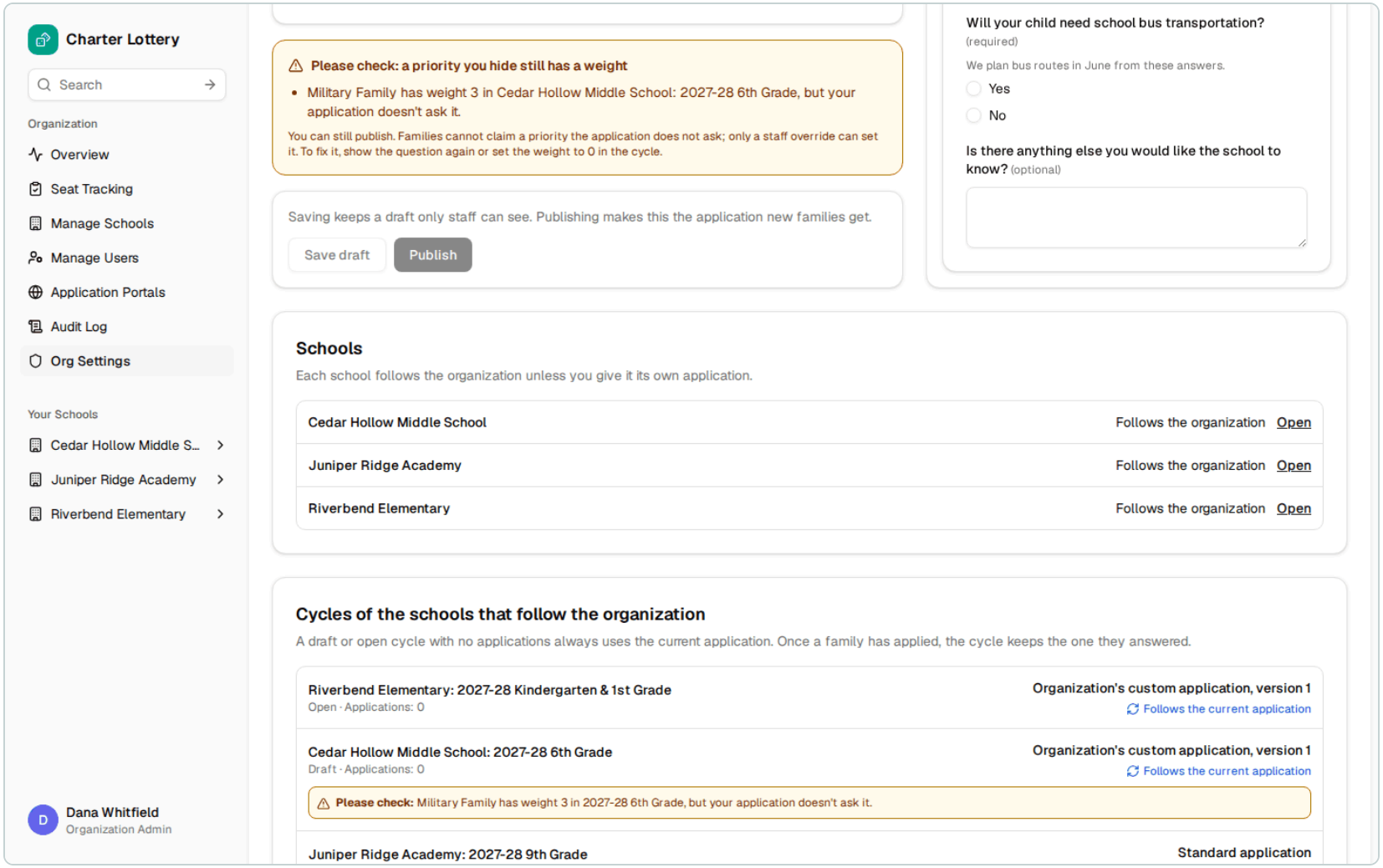


Saved: two cycles changed, one kept.

Step 26. See each cycle's application

The cycles list shows what each cycle asks. **Follows** means it moves with your next version; **Fixed** means families have applied and it keeps theirs.

An amber **Please check** means a cycle weights a priority you hid. Show the question again or set the weight to 0.



Each cycle's application, with one weight to check.

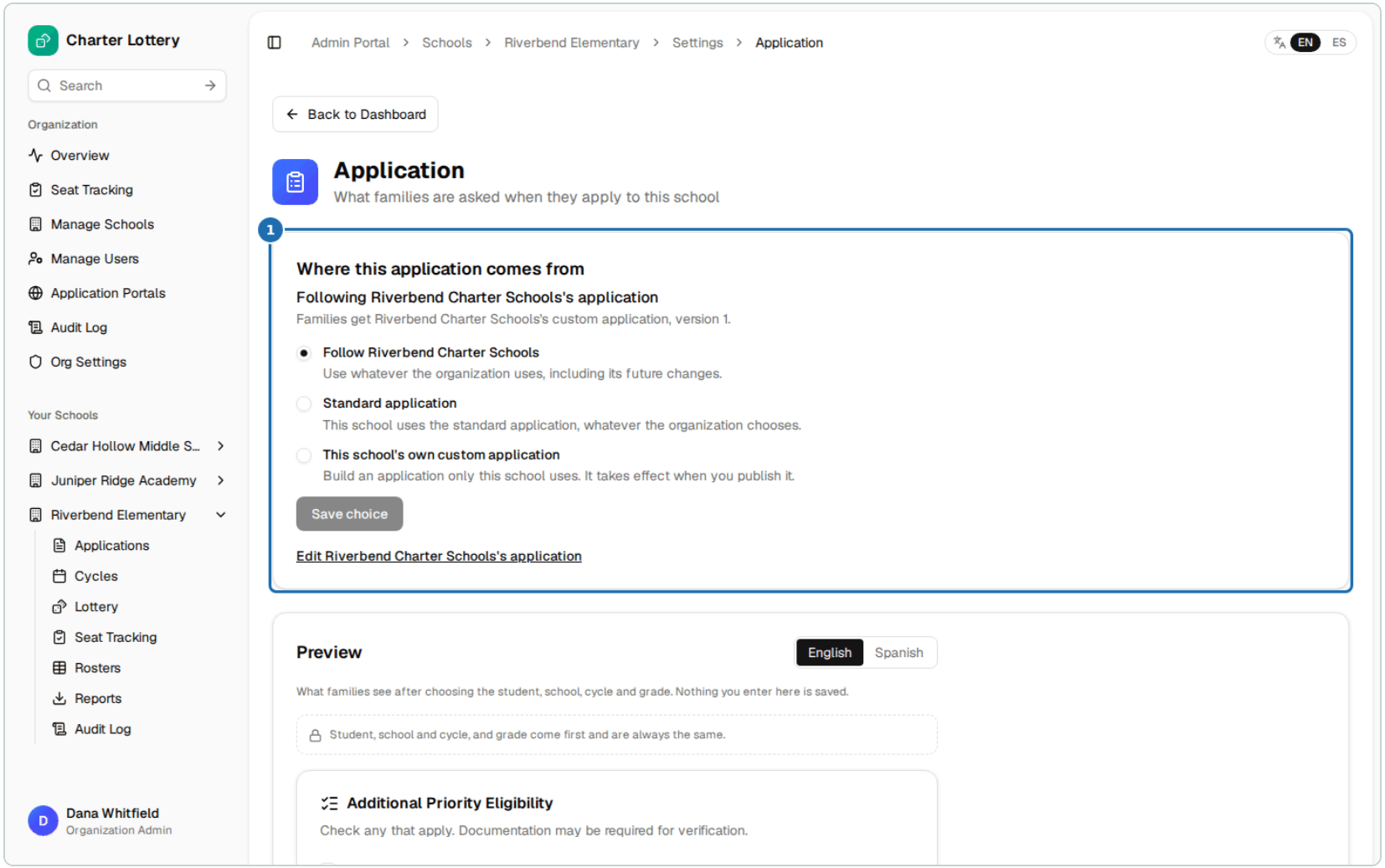
PART 5

Choices for each school

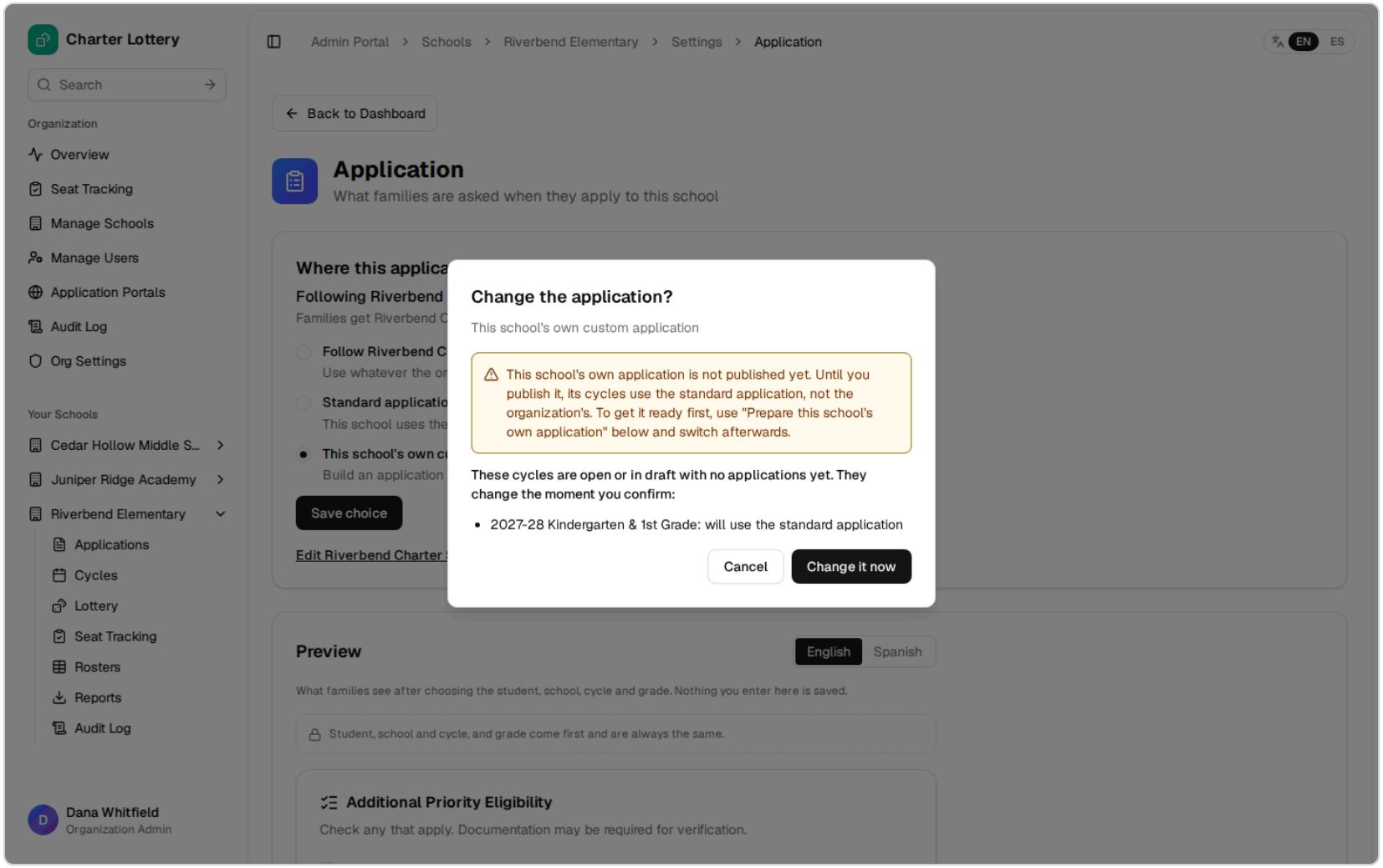
Step 27. A school's application

Open beside a school shows where its application comes from (1): **Follow** the organization, **Standard**, or **This school's own custom application**.

Choosing its own before it is published gives its cycles the standard application. Prepare and publish it lower on the page first.



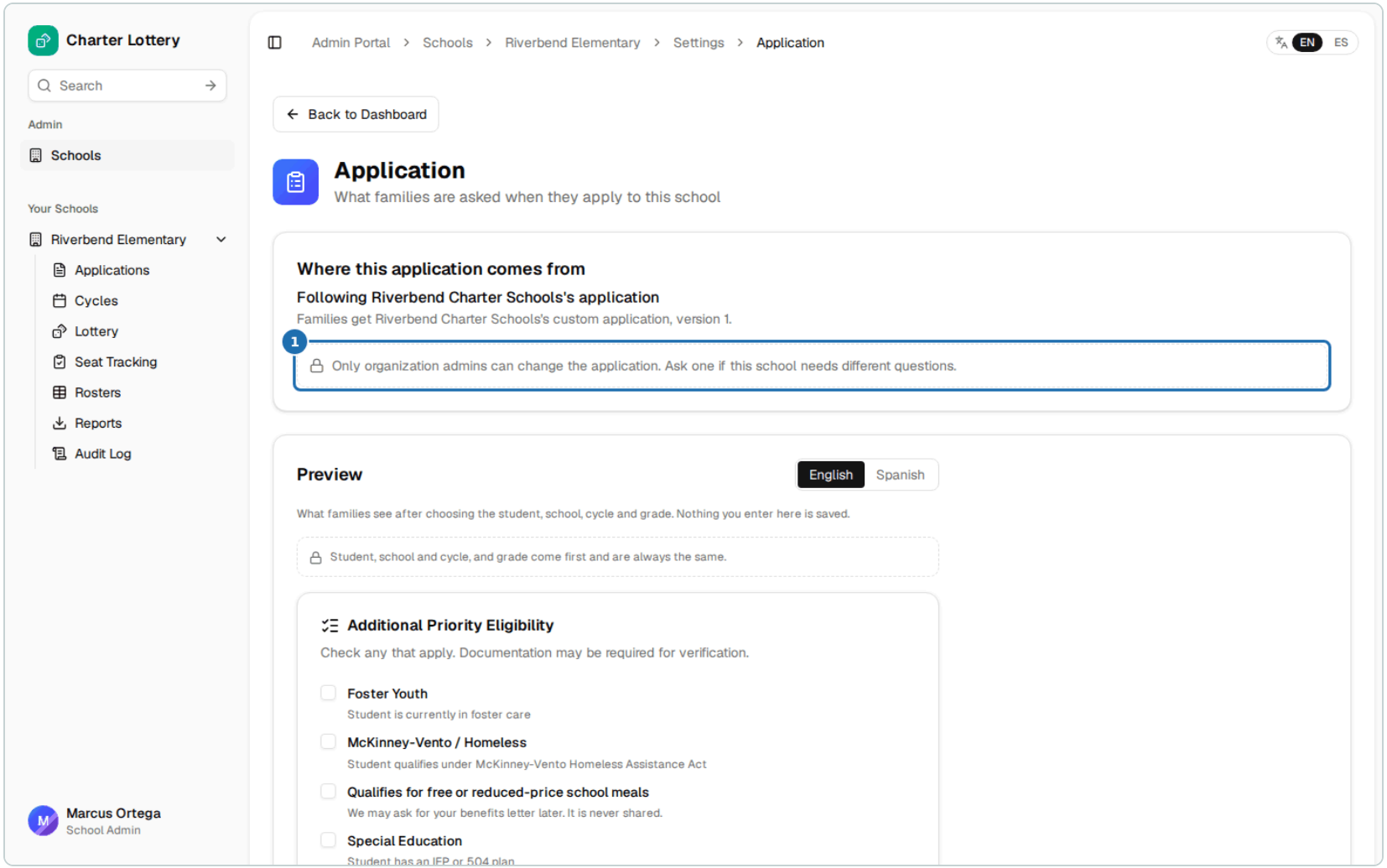
Riverbend Elementary follows the organization.



The warning before switching to an unpublished form.

Step 28. What a school admin sees

School admins see the same page read-only (1): where the application comes from, the version and a preview. **Only organization admins can edit the application**, so school admins ask you for changes.

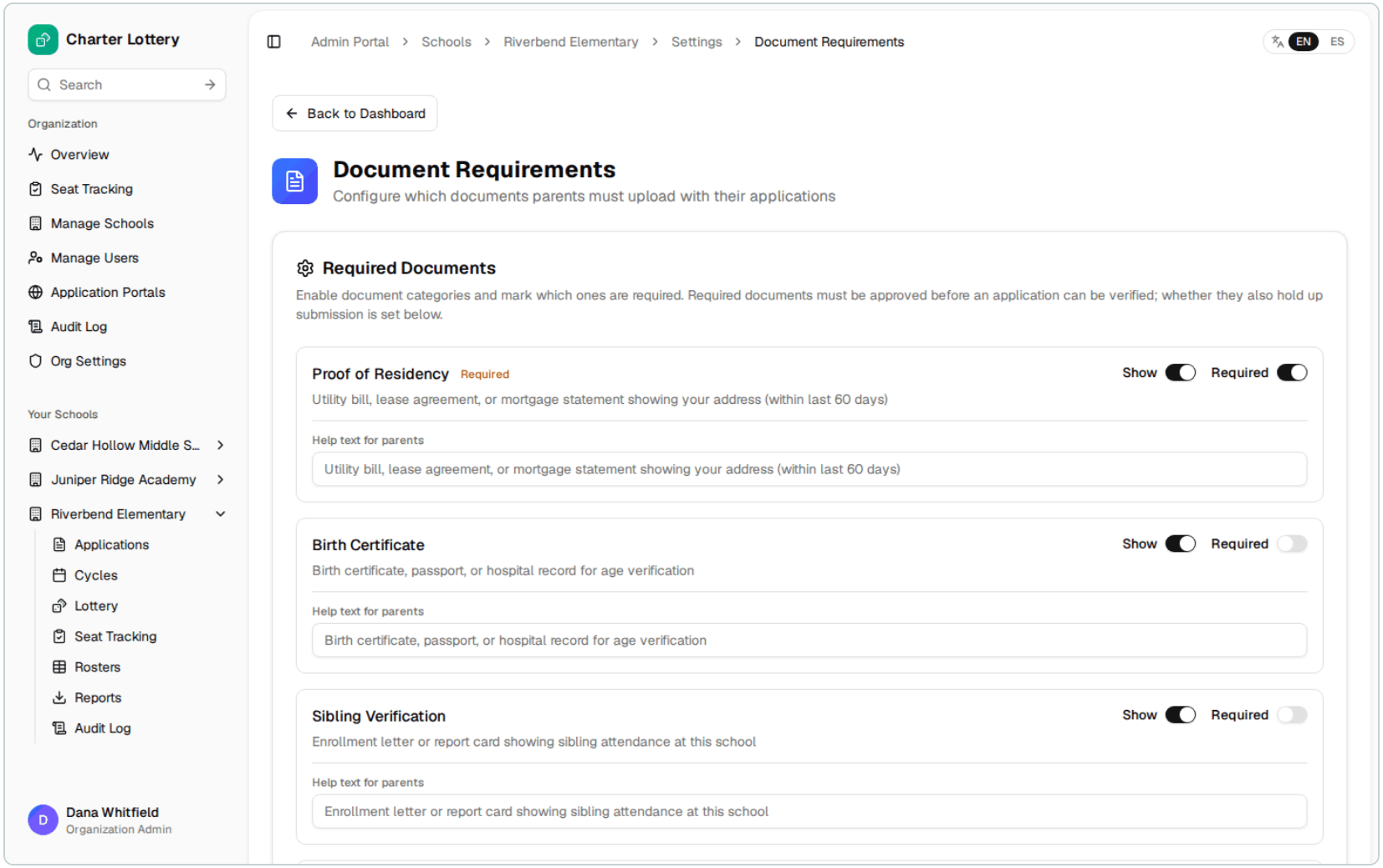


The page as Marcus Ortega, School Admin.

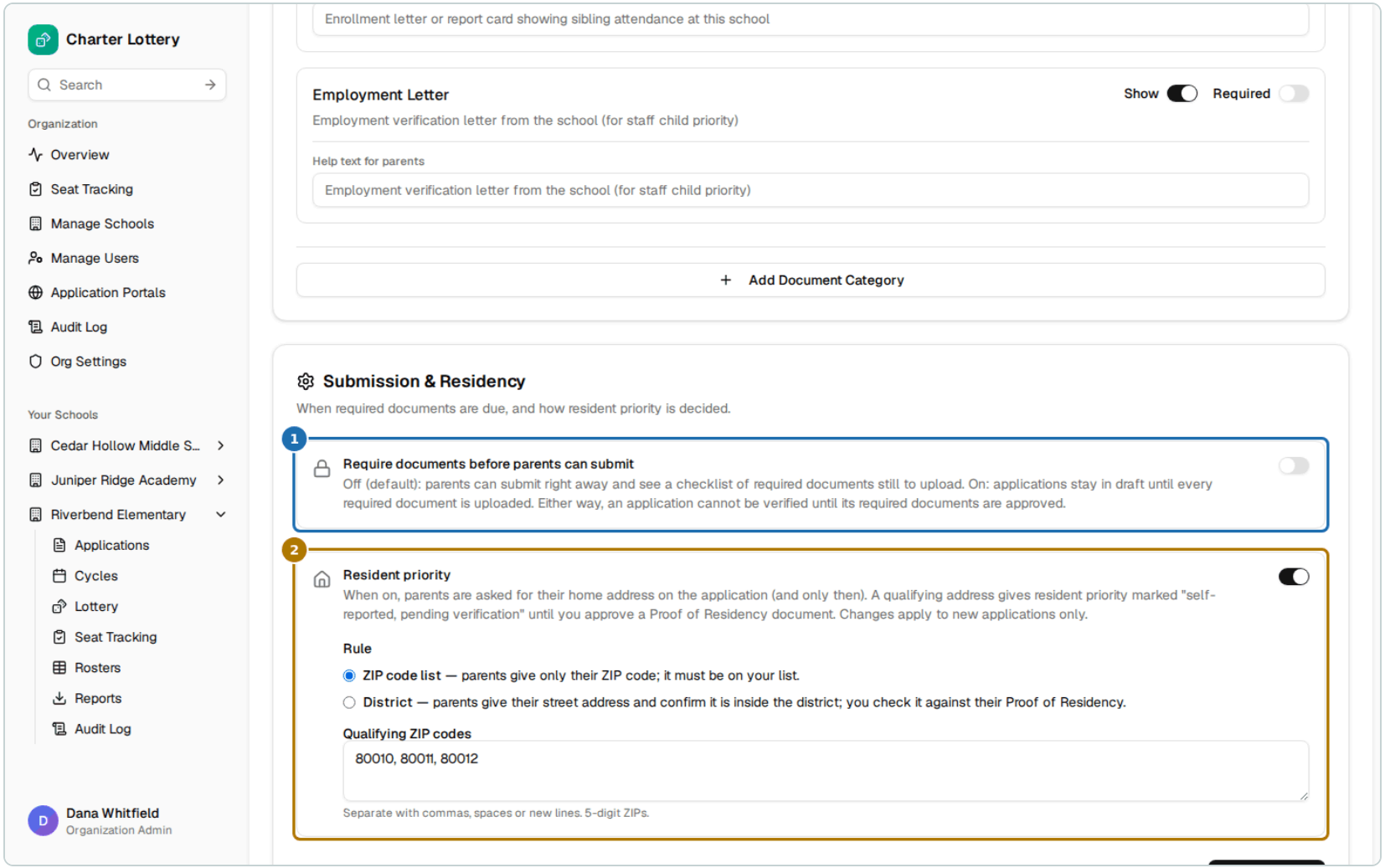
Step 29. Required documents

There is no file-upload question: under **Documents → Configure**, choose what families upload and what must be approved before you verify.

Require documents before parents can submit (1) holds applications in draft. **Resident priority** (2) adds the home address block.



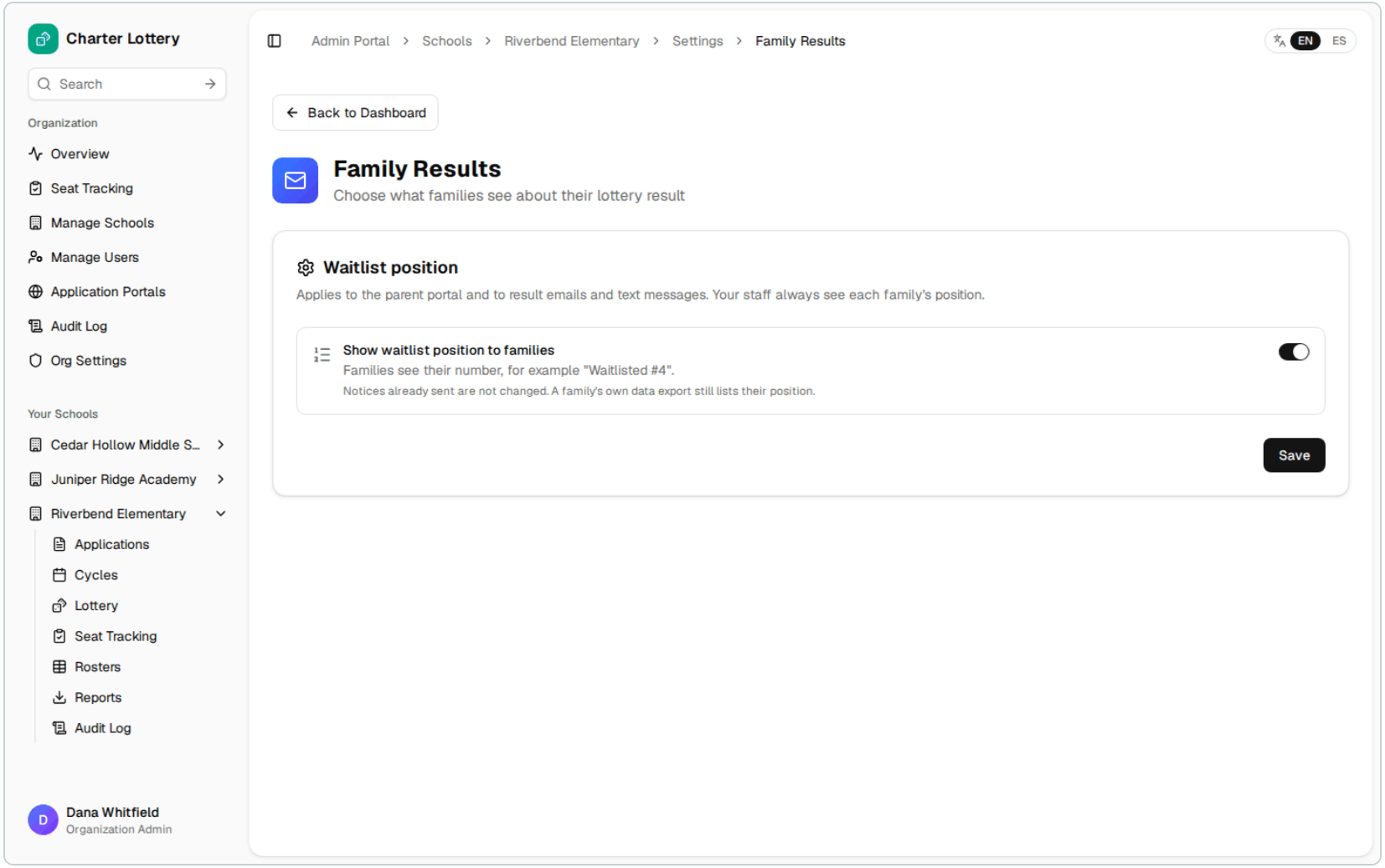
Document requirements.



Submission and resident priority.

Step 30. The waitlist number

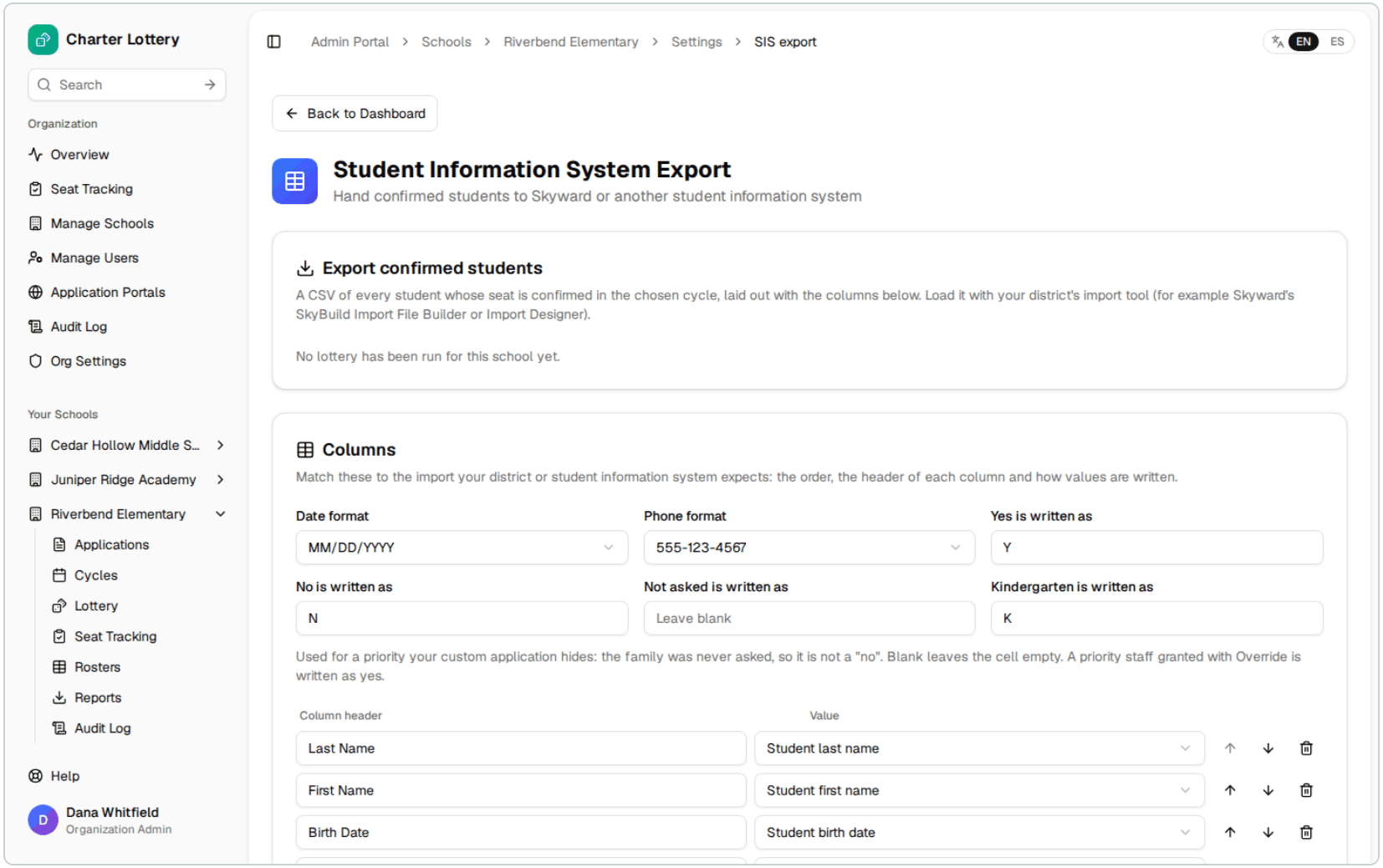
Under **Family results**, choose whether families see their waitlist position. Staff always see it.



The waitlist position setting.

Step 31. Student information system export

Under **Student information system**, set the columns of the CSV of confirmed students for your district's import. A priority you hide was never asked, so it is not exported as "No": **Not asked is written as** sets its cell (blank unless you change it). Your own questions are not export columns yet.



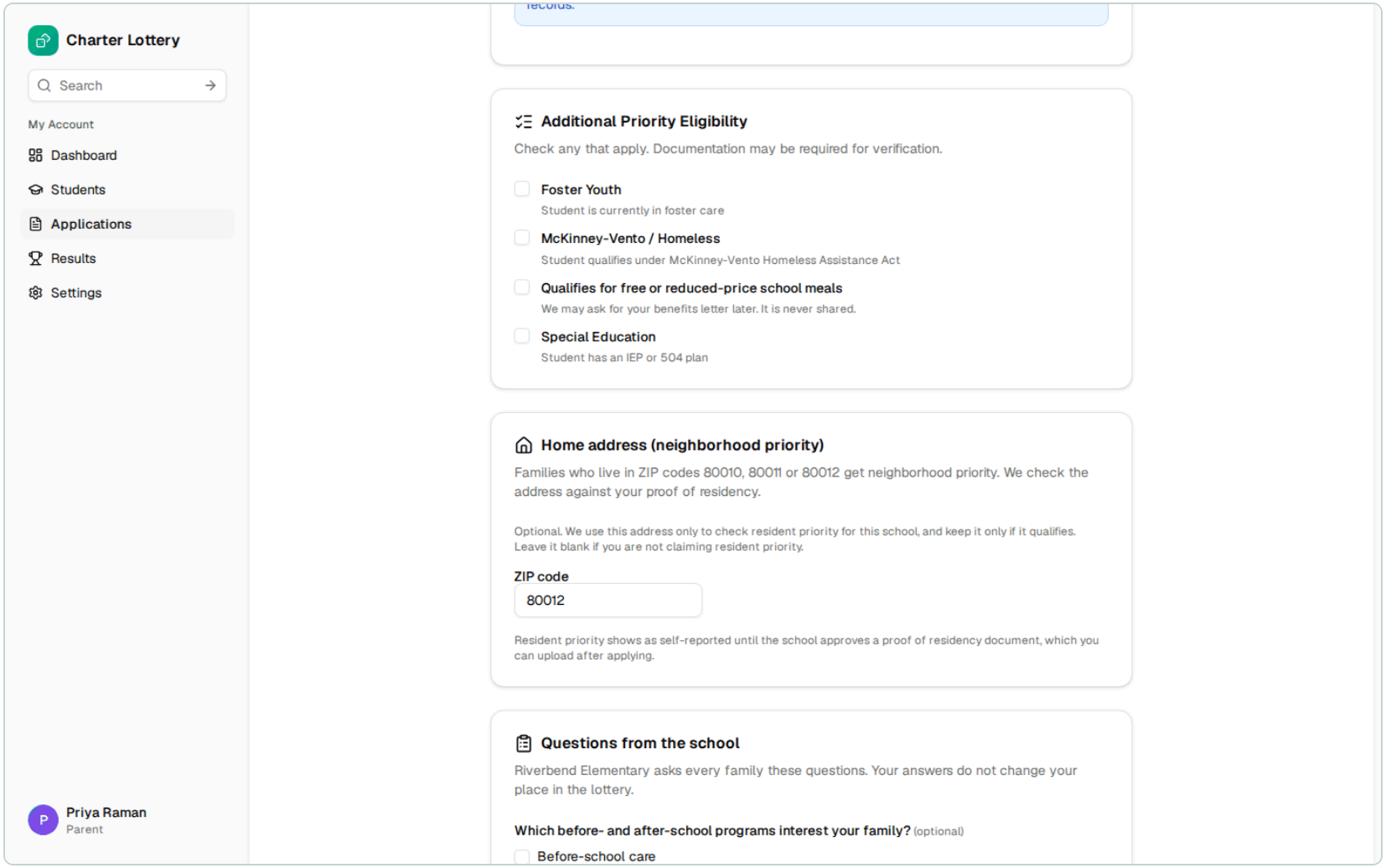
The SIS export columns.

PART 6

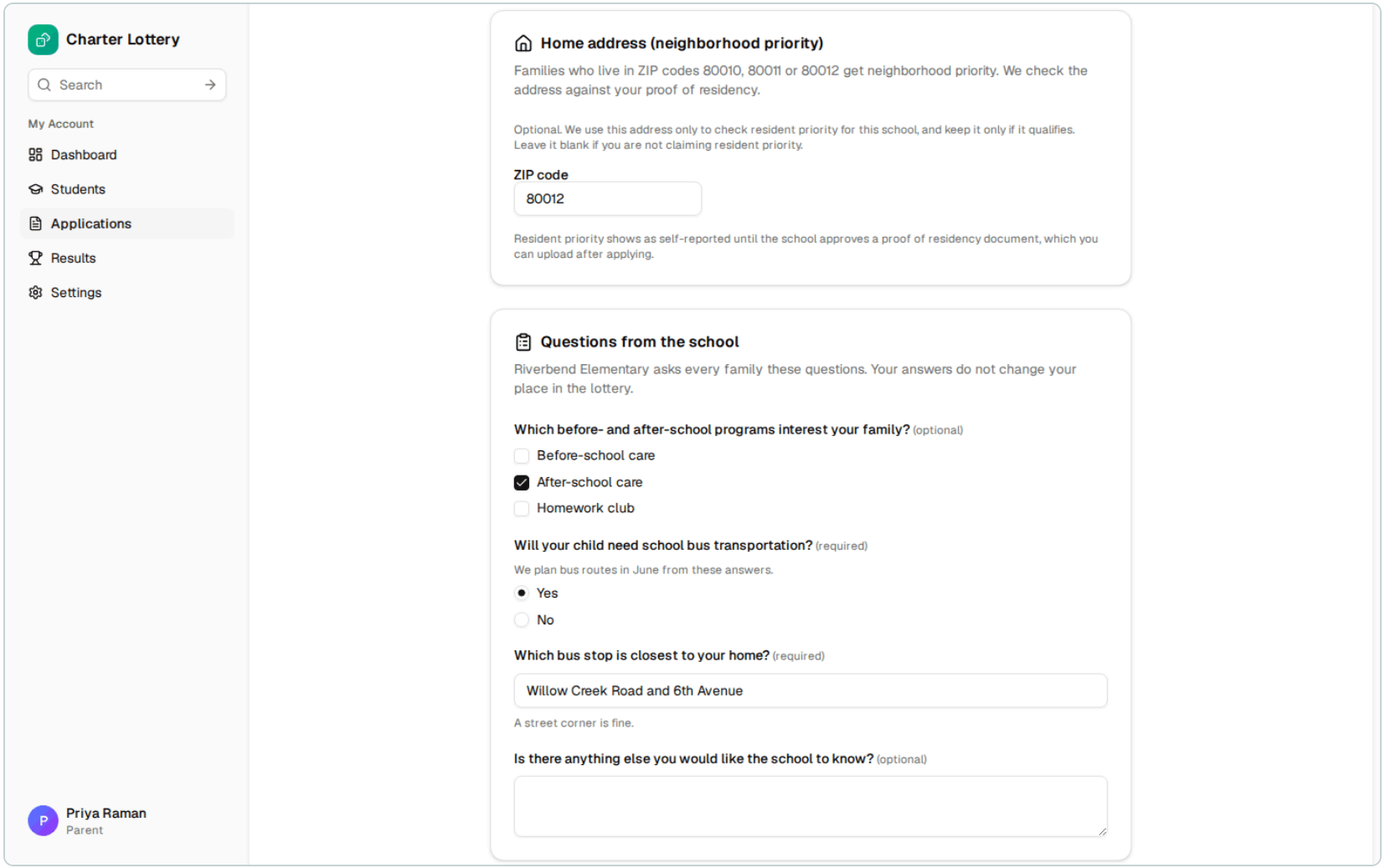
See it as a family

Step 32. On a laptop, in English

After choosing the student, school, cycle and grade, a family sees your priority questions, the home address block and **Questions from the school**, in your order and wording.



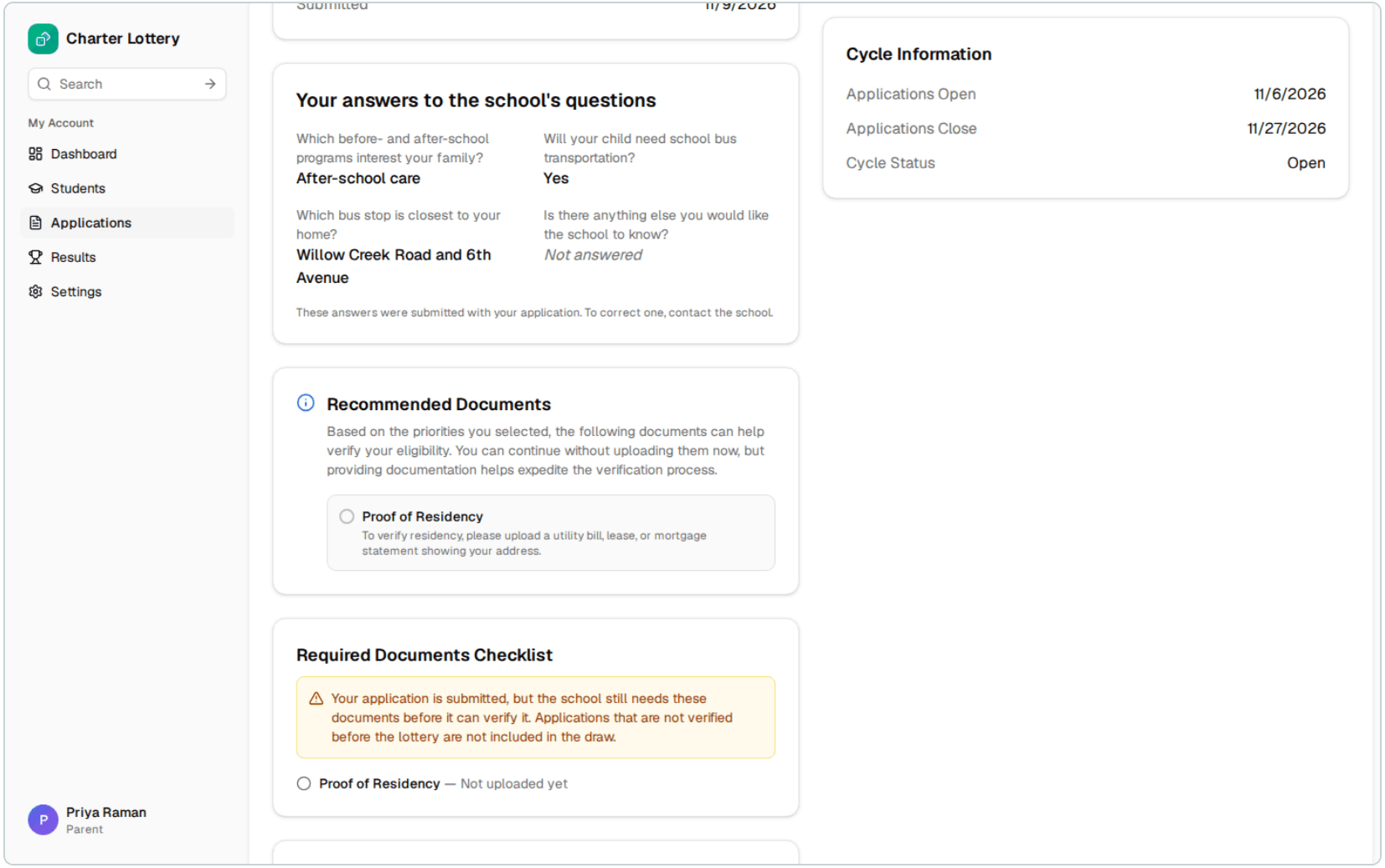
The reworded priority and the address block.



Your own questions, with the follow-up shown.

Step 33. After they submit

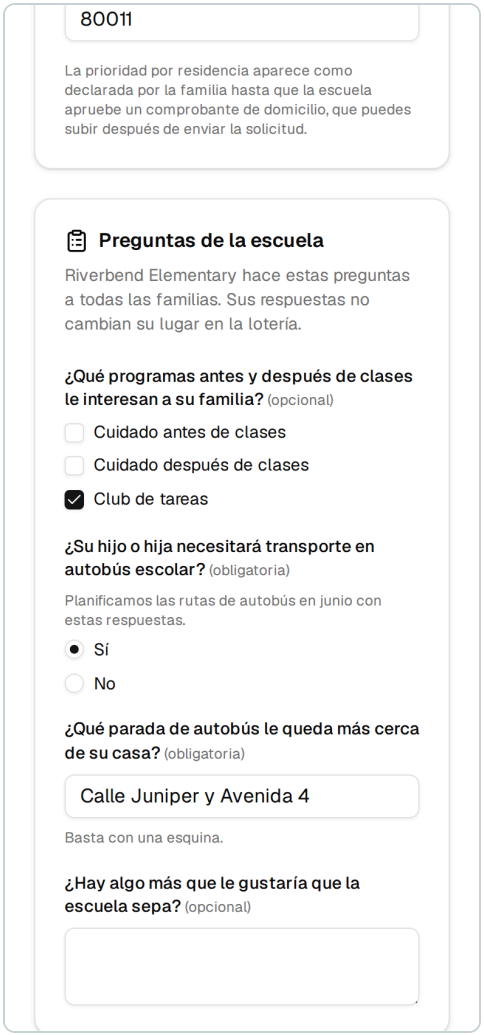
The family's application page lists their answers. Once submitted they cannot change them and are told to contact the school.



The family's own answers.

Step 34. On a phone, in Spanish

A family whose account is set to Spanish reads every question, option and help text in Spanish. Staff see the chosen options in their own language; typed answers appear as the family wrote them.



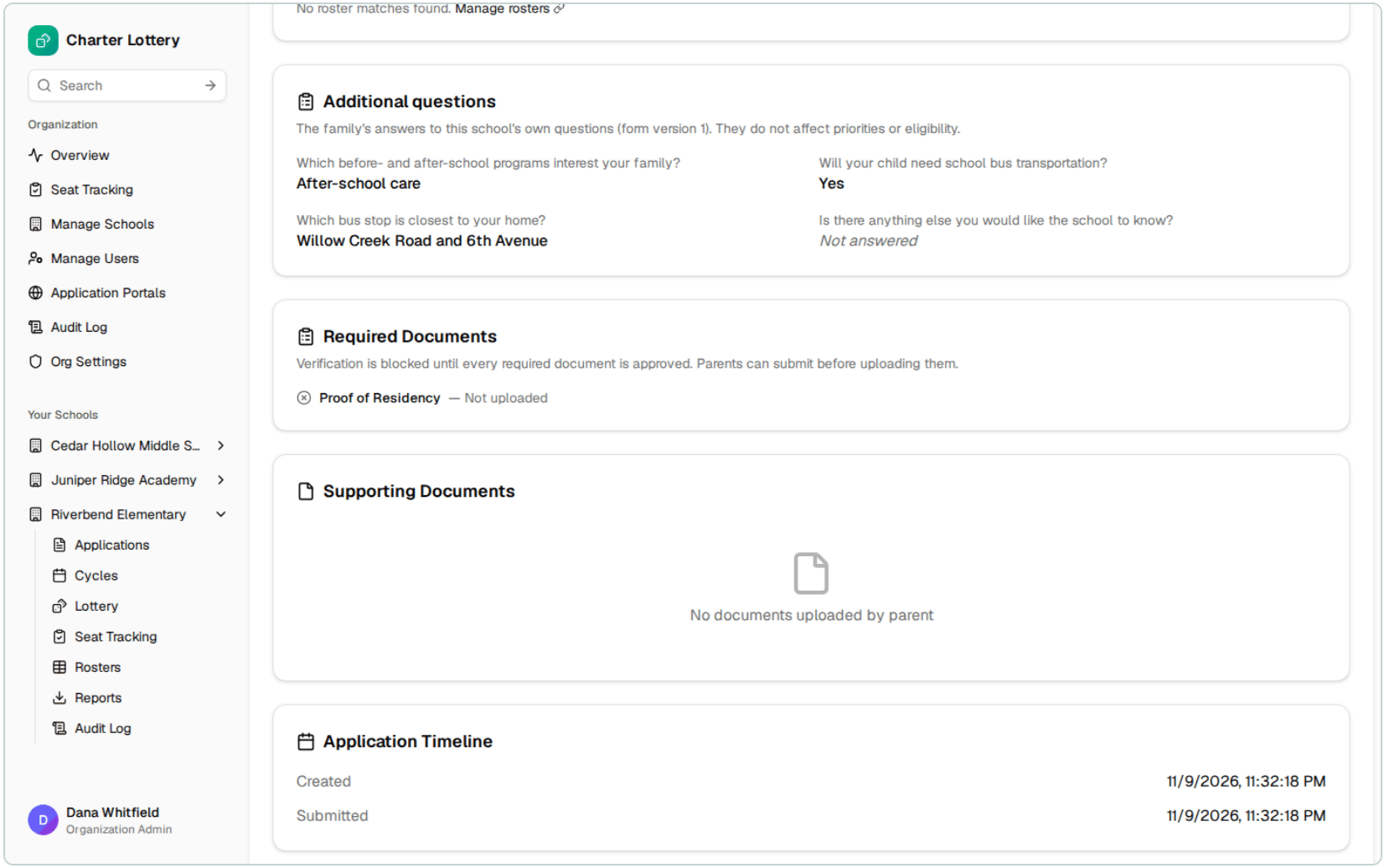
The same questions on a phone, in Spanish.

PART 7

After applications arrive

Step 35. Answers on the application

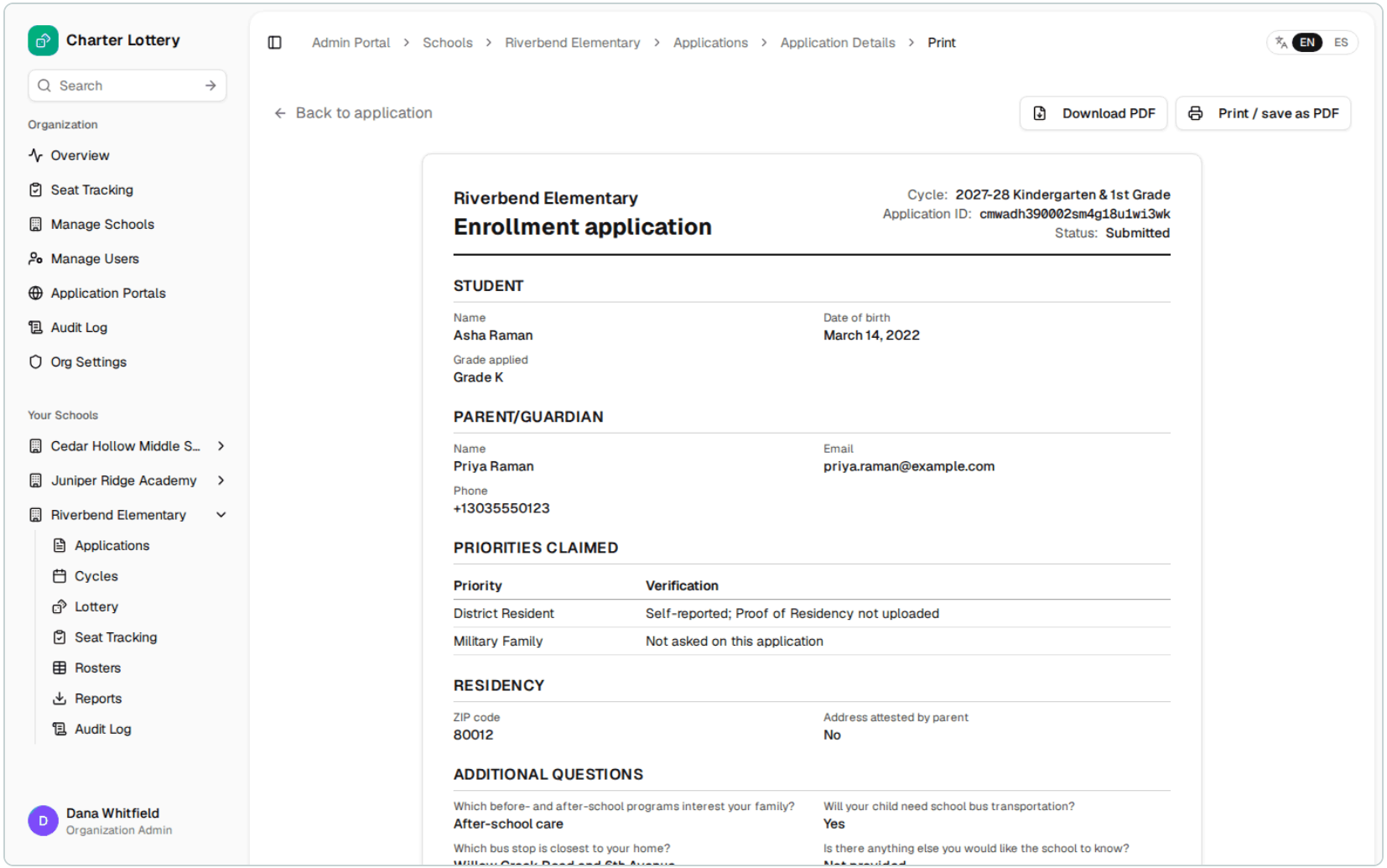
Each application shows **Additional questions** with the family's answers and the version they answered. Staff can correct an answer with **Edit application**, giving a reason, until the lottery runs. There is no filter or sort by an answer in the applications list yet.



Answers on the admin application page.

Step 36. The print sheet and PDF

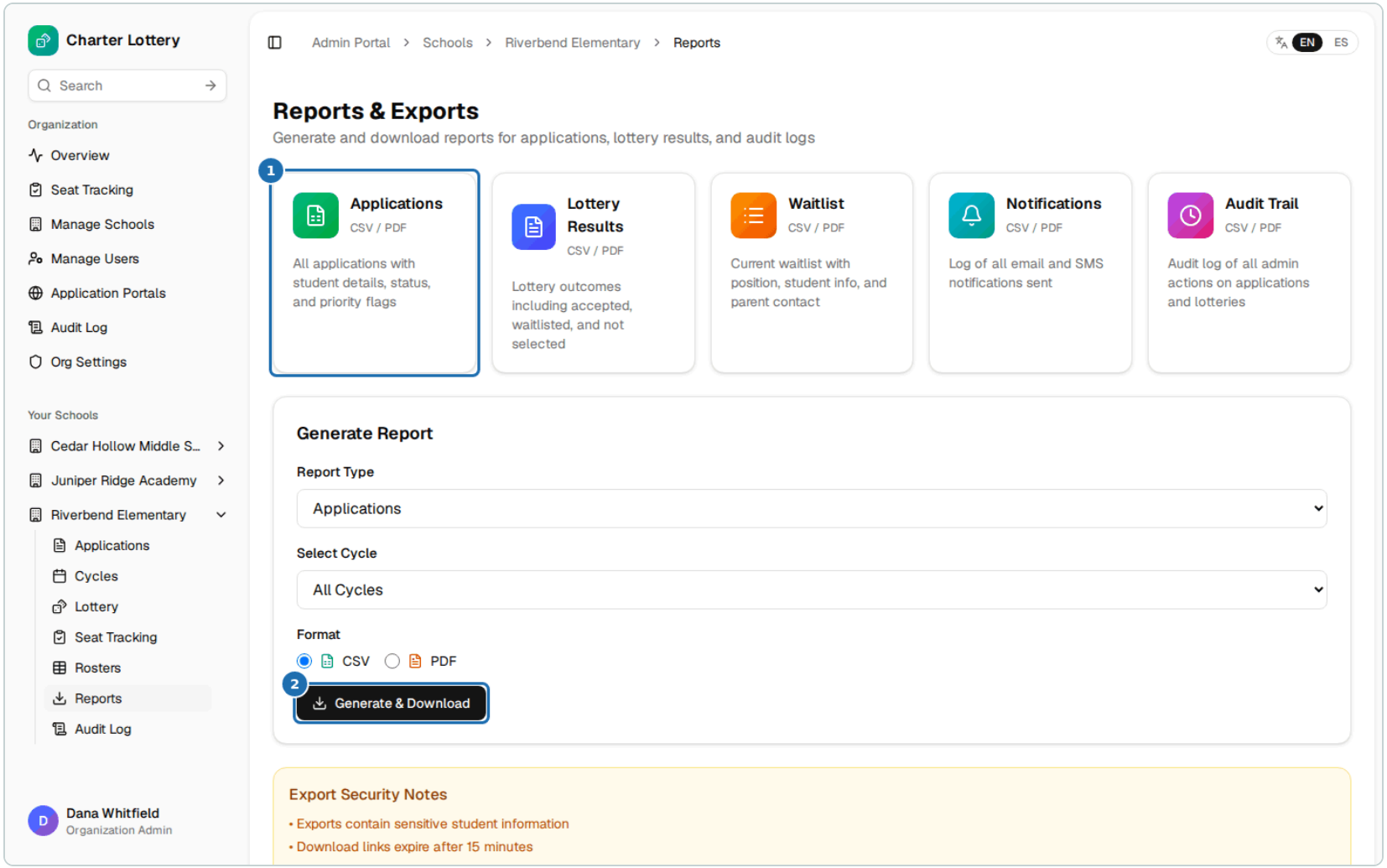
Print on an application opens a printable sheet with the answers, and **Download PDF** saves the same as a PDF. A hidden priority reads **Not asked on this application**.



The print sheet.

Step 37. The applications CSV

In **Reports**, choose **Applications** (1), a cycle and **CSV**, then **Generate & Download** (2). Each of your questions becomes a column headed by its English text and export column ID, with answers in English. The PDF list has no question columns.

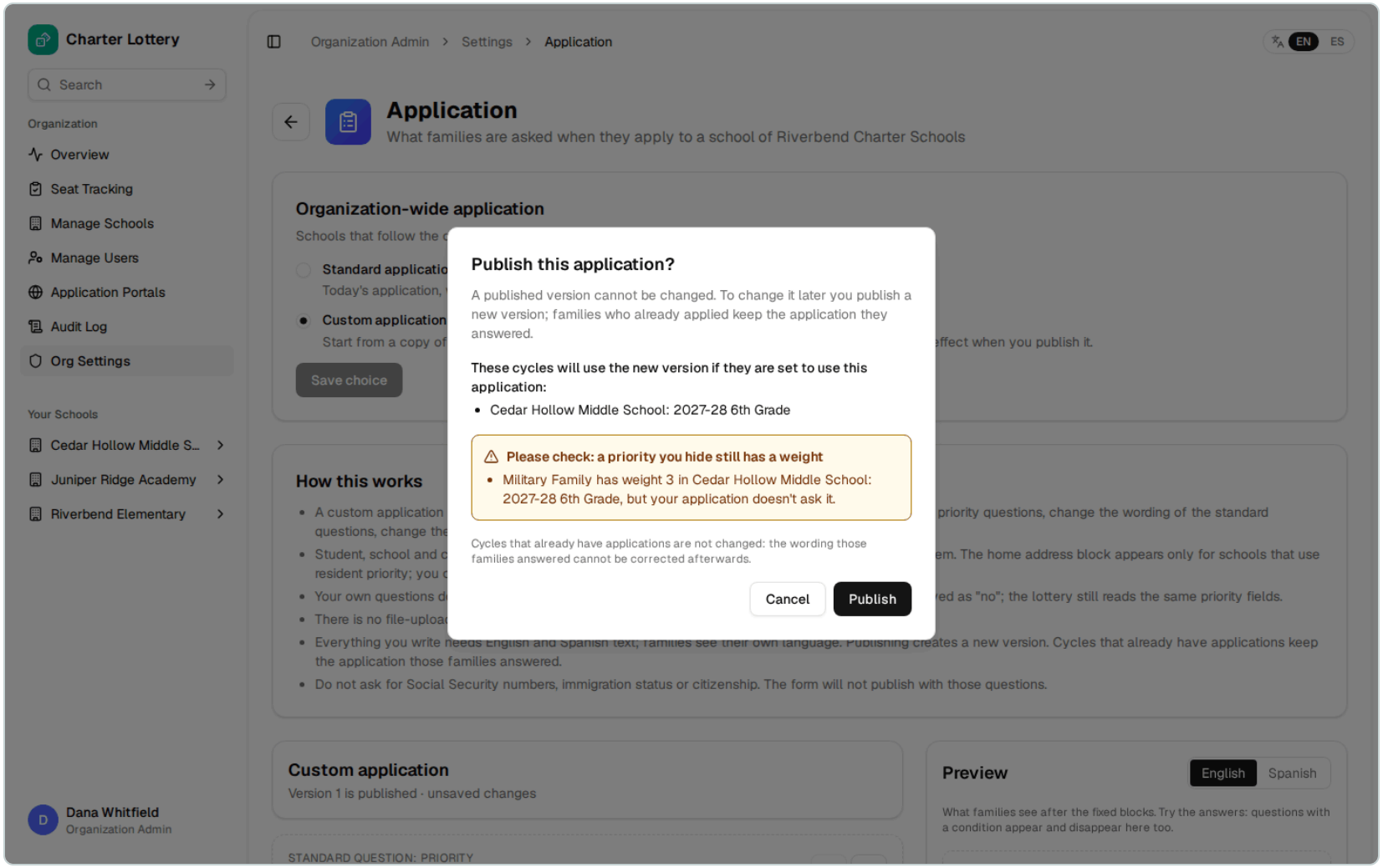


Reports and exports.

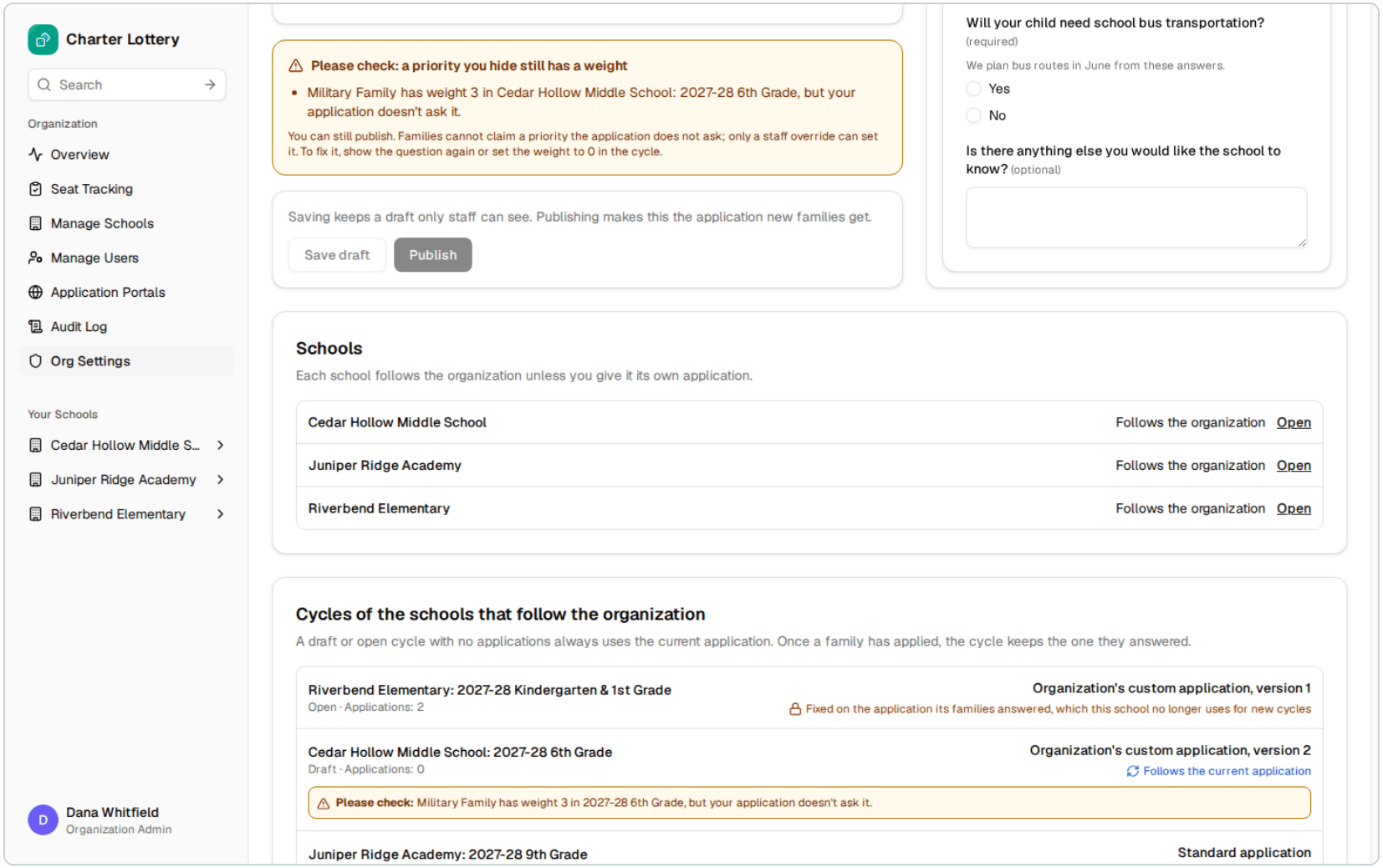
Step 38. Change the application mid-season

Edit and publish again. The confirmation lists the cycles that will move to version 2 and warns about hidden priorities that still have a weight.

Riverbend Elementary already has applications, so it stays on version 1 and everyone in that cycle answers the same questions.



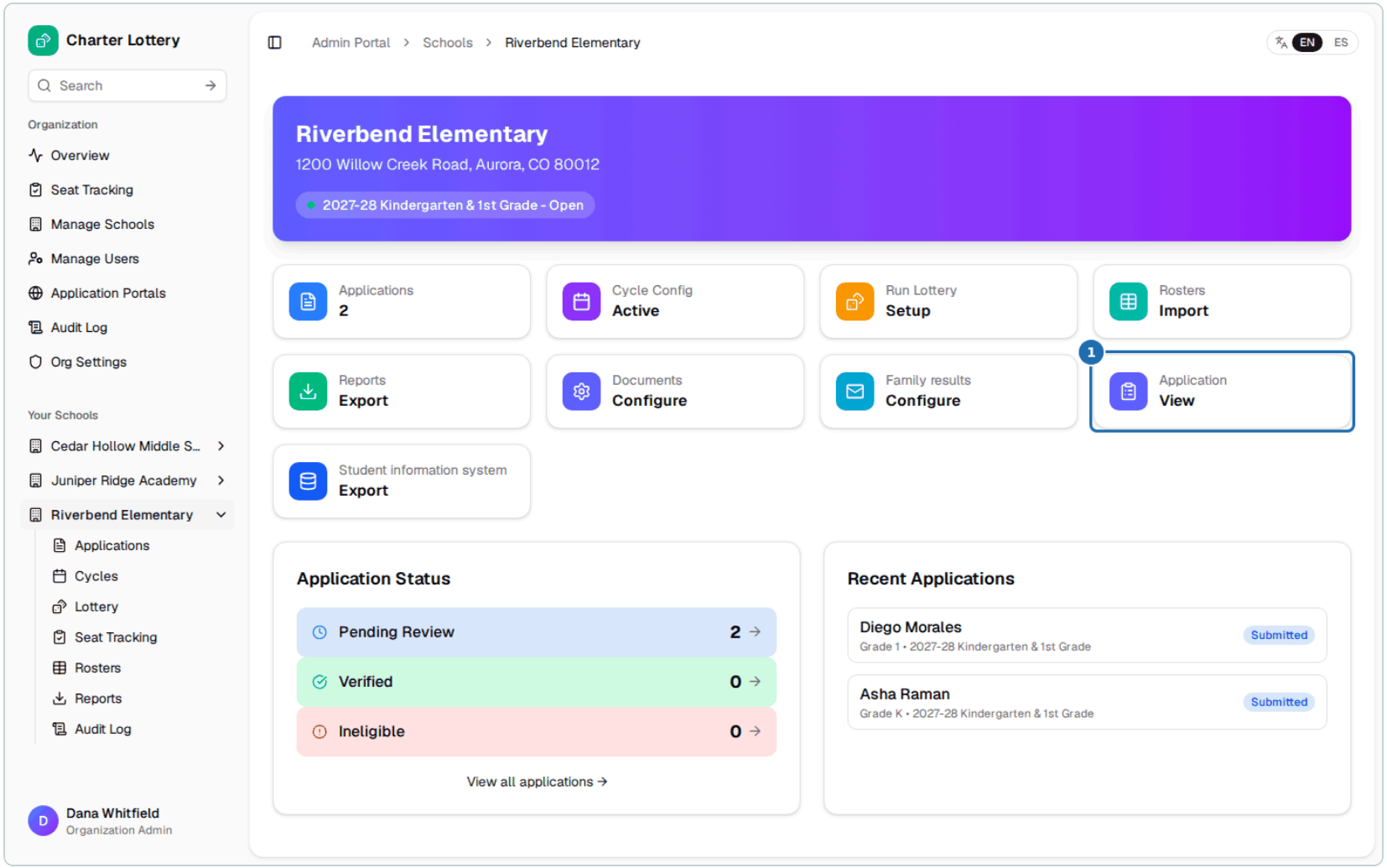
Publishing version 2.



Riverbend Elementary fixed on version 1; Cedar Hollow on version 2.

Step 39. Hand over to the school admins

Each school's dashboard links to its application (1) and everything else for the season. The **School Admin walkthrough** covers review, the draw, results, the waitlist and finalizing.



A school dashboard.

Where answers appear

Place	What it shows
The family's application page	Their answers, read-only once submitted
The admin application page	Additional questions, with the form version
The print sheet and PDF	Answers, and hidden priorities as "Not asked"
The applications CSV	One column per question, in English
The family's own data export	Their answers
The SIS export	Hidden priorities as your not-asked value (blank by default); your own questions are not columns yet

Application go-live checklist

- [ ] At least two organization admins, each with two-step sign-in and saved recovery codes
- [ ] Every question has English and Spanish text, read by a Spanish speaker
- [ ] No Must fix, and every Please check read
- [ ] Preview tried in both languages, including each follow-up question
- [ ] No hidden priority still has a weight in a cycle, unless you meant it
- [ ] Version published and the organization switched before the first cycle opens
- [ ] Each school's choice is right, and a test application checked on the admin page and print sheet

Support

Help: support@charterlottery.com. Charter Lottery does not publish support hours or a response time. Every admin screen is covered in detail in the organization and school admin guide.