CHARTER LOTTERY · SCHOOL ADMINS

School Admin Walkthrough

From your invitation email to a finished lottery season in Charter Lottery. Every picture is a full 1440 × 900 laptop window from the current application, seen as a School Admin, using a made-up school, Riverbend Elementary, and a made-up admin, Marcus Ortega.

1. Sign in for the first time
2. Find your way around
3. Prepare the school
4. Open applications
5. Review applications
6. Run the lottery
7. Publish results
8. Manage seats and the waitlist
9. Close the season
Who to ask and season checklist

What your role covers

Task	School Admin
Document requirements and rosters	Yes, for your schools
Create, edit, open and close cycles	Yes, for your schools
Review documents, verify, mark ineligible, override priorities	Yes, for your schools
Run the lottery and publish results	Yes, for your schools
Seats, waitlist, reports, finalize	Yes, for your schools
Invalidate a draw	**No.** Ask an organization admin
Invite staff, change settings, manage portals	**No.** Ask an organization admin

Have ready

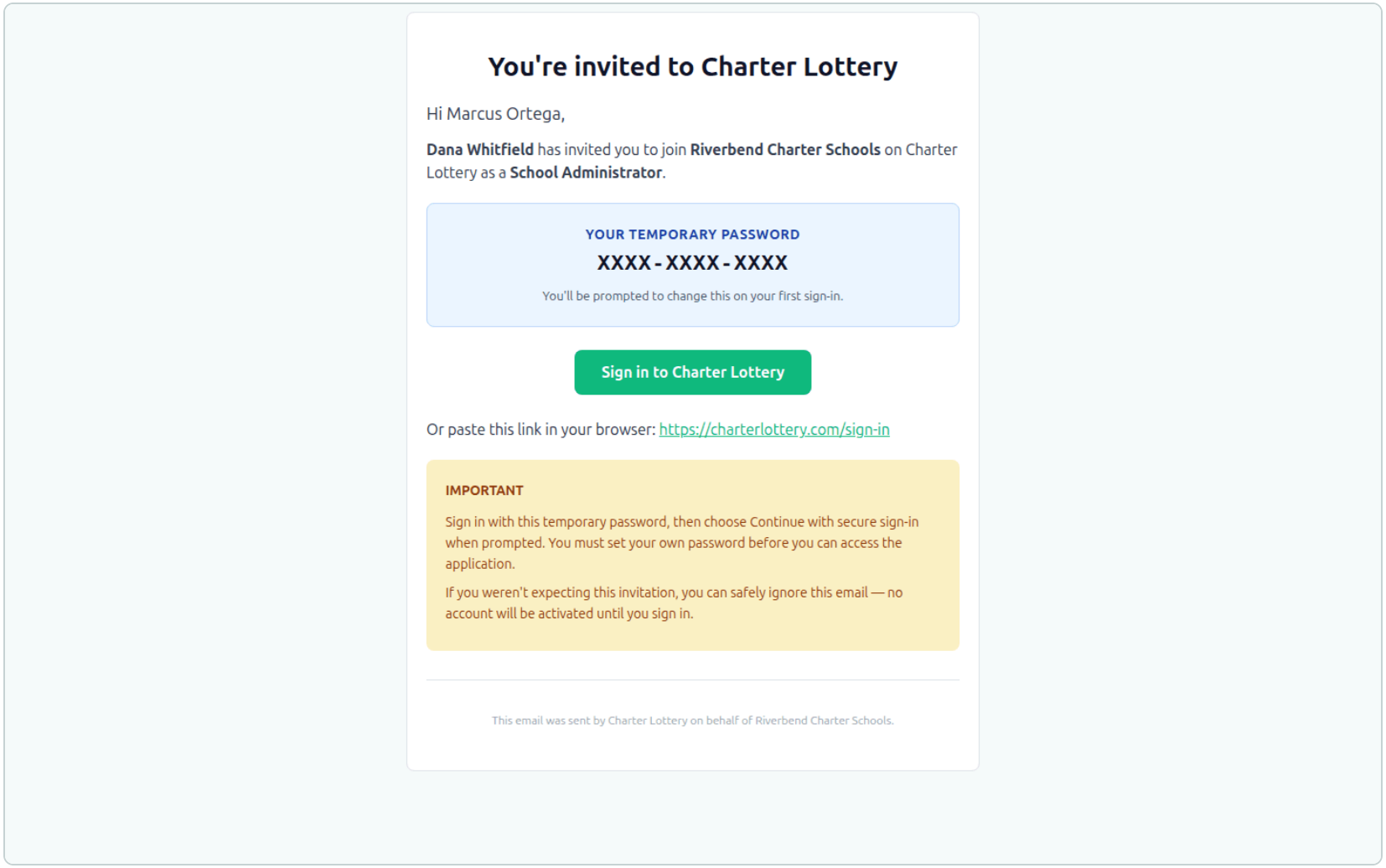
- The invitation email, opened within 7 days
- A phone with an authenticator app, and a password manager for recovery codes
- Grades, seats, and the dates applications open and close
- Your school's priority rules and which documents you require
- Optional: current-student, staff and alumni rosters as CSV or Excel

PART 1

Sign in for the first time

Step 1. Open the invitation

Your organization admin invites you and assigns your schools. The email comes from `noreply@charterlottery.com` with a temporary password valid for **7 days**. If it has expired, ask them to resend it.

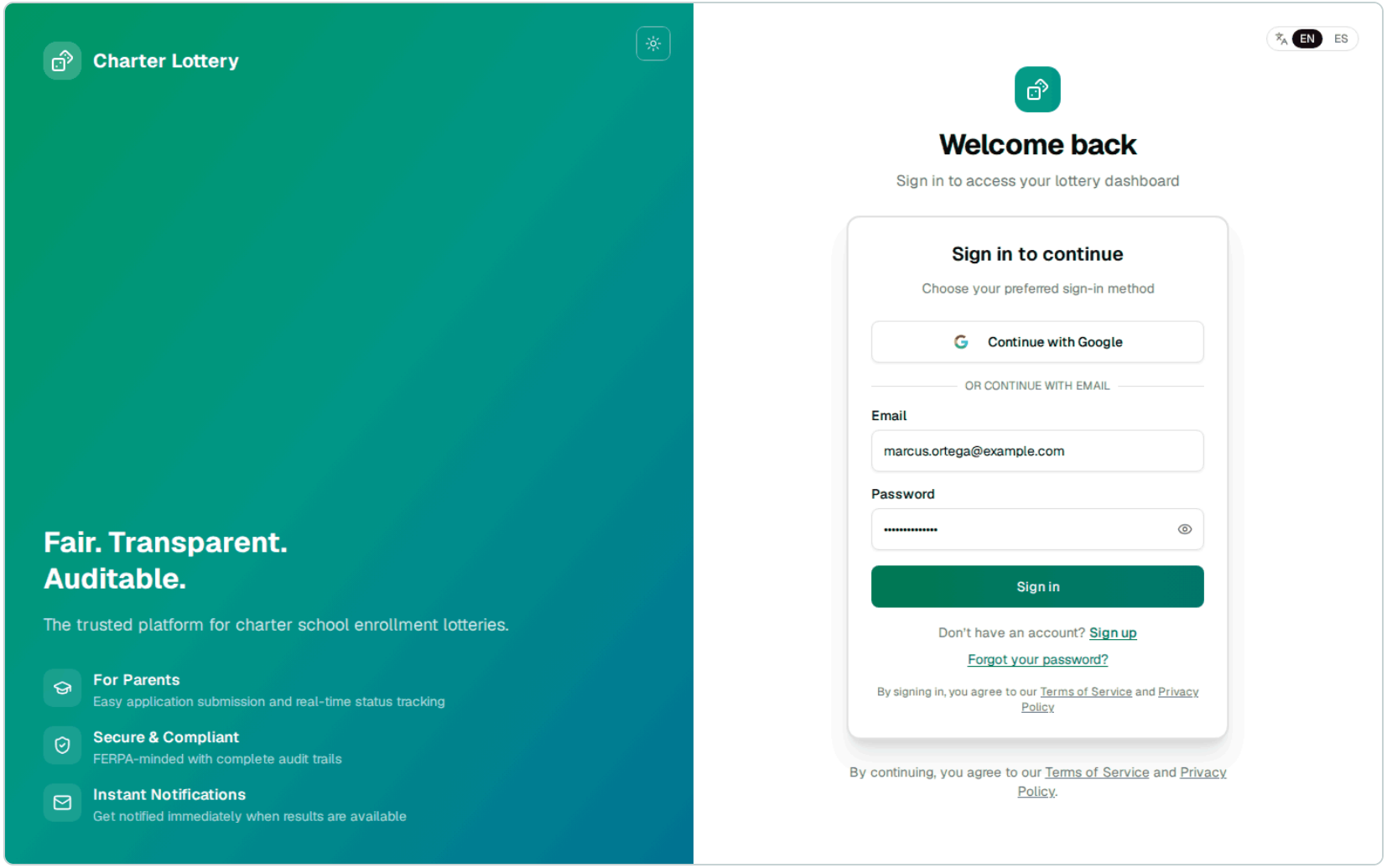


The invitation email, with the password masked.

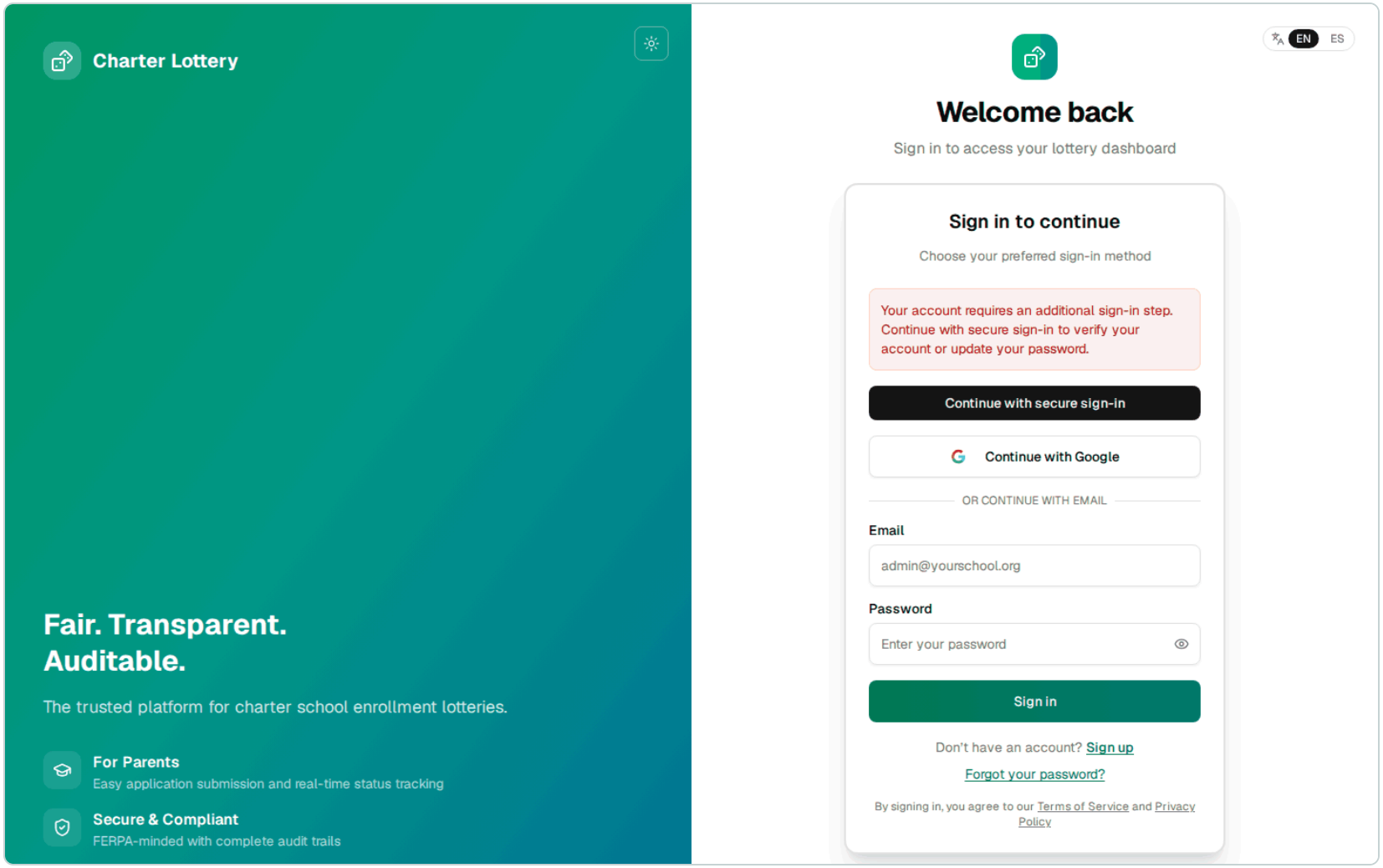
Step 2. Sign in and set your password

Enter your email and the temporary password, then select **Sign in**.

Select **Continue with secure sign-in** when prompted and choose your own password on the page that opens, which is not pictured. If your Google account uses the same verified email, you can use **Continue with Google** instead.



Sign in with the temporary password.

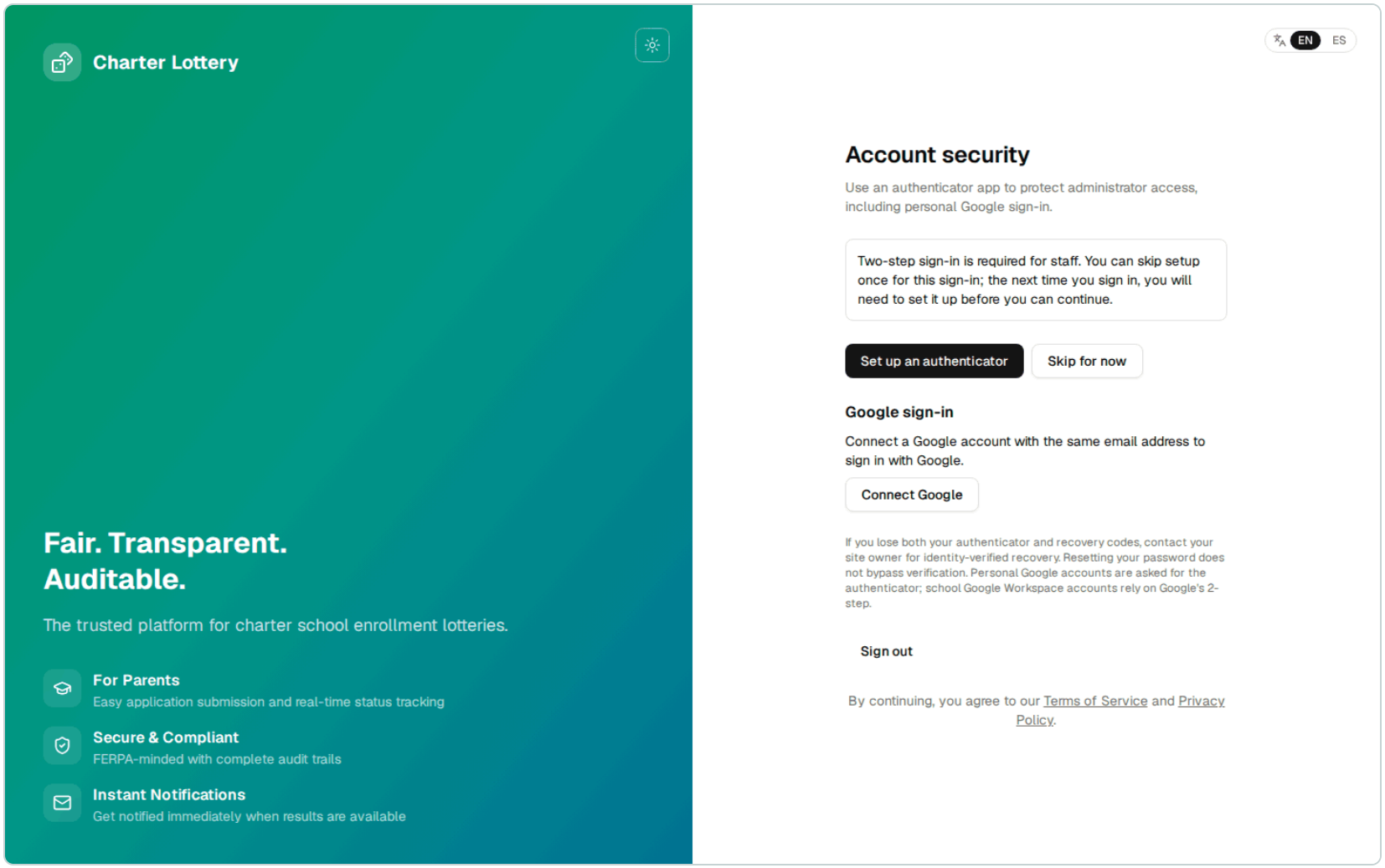


Continue with secure sign-in.

Step 3. Set up two-step sign-in

Select **Set up an authenticator**. Any app with time-based codes works, such as Microsoft Authenticator, Google Authenticator, 1Password or Authy.

Skip for now works once. You must set it up at your next sign-in. School Google Workspace sign-ins are not asked, because Google's own 2-Step applies.

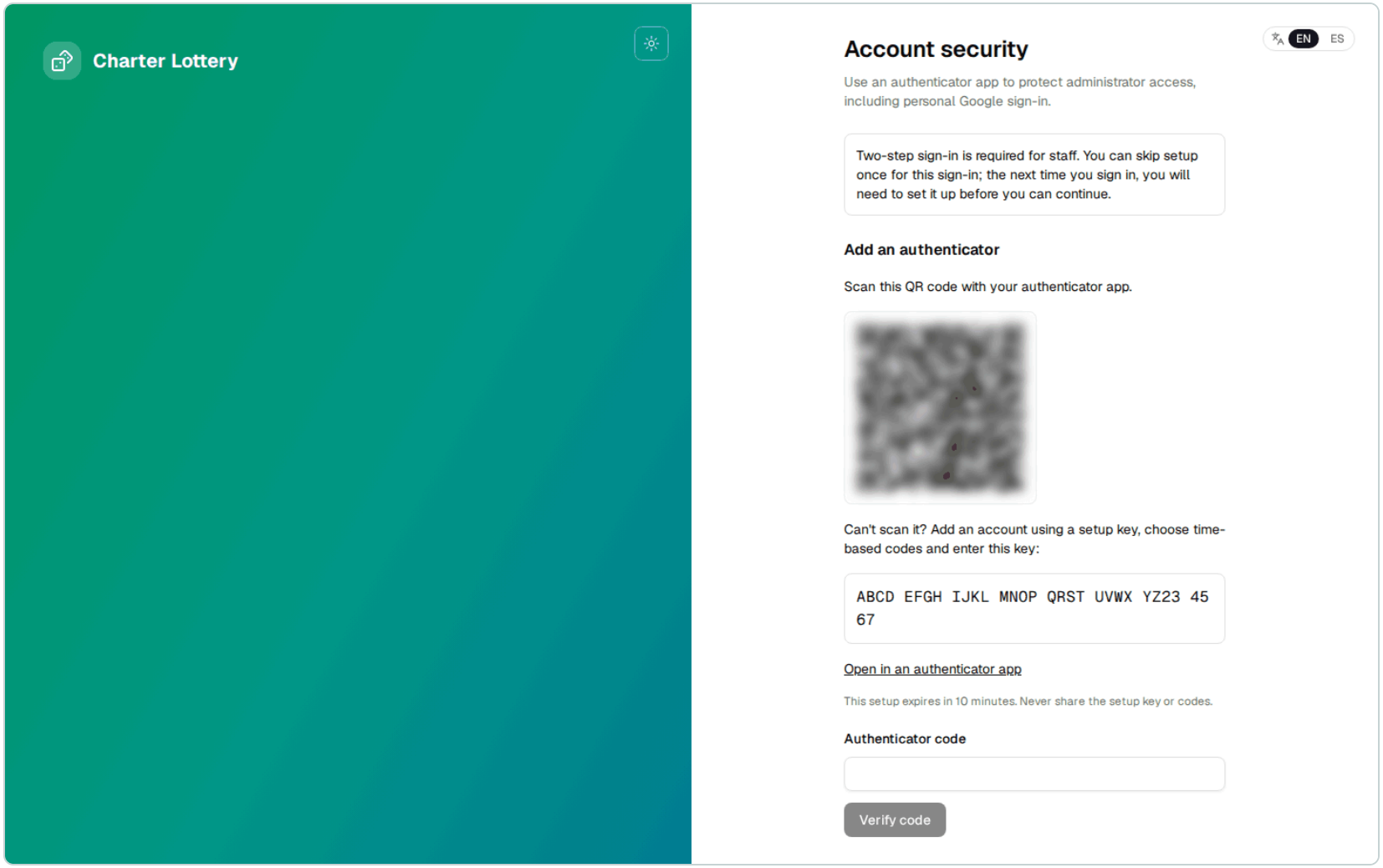


Account security on first sign-in.

Step 4. Scan the QR code

Scan the code with your app, or enter the setup key below it. Enter the six-digit code and select **Verify code**. The setup expires after 10 minutes.

The code and key are masked in this picture.

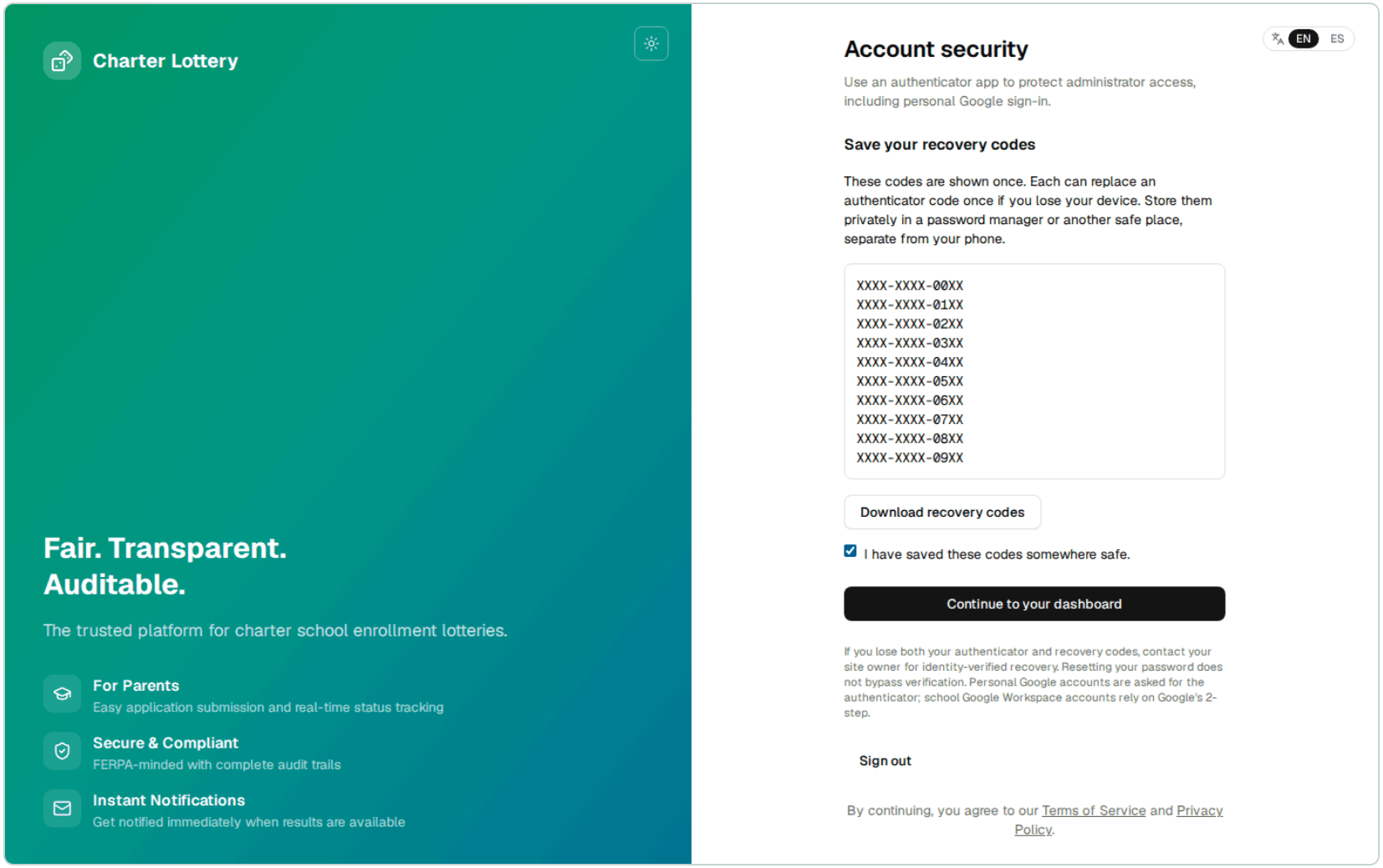


The QR code and setup key, masked.

Step 5. Save your recovery codes

The 10 codes are shown once. Save them in a password manager, away from your phone. Tick **I have saved these codes somewhere safe**, then

select **Continue to your dashboard**.



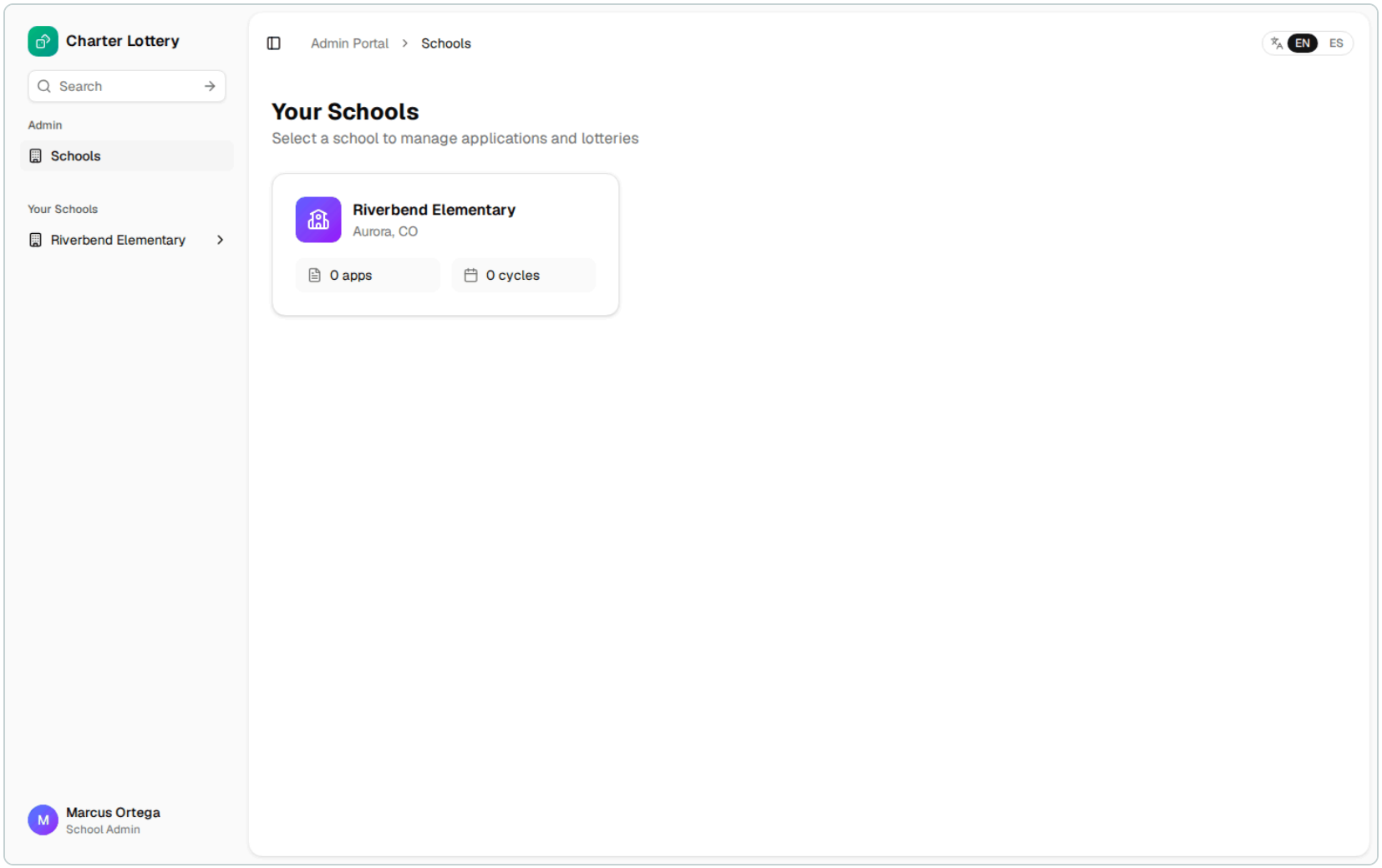
Recovery codes, masked in this picture.

PART 2

Find your way around

Step 6. Your Schools

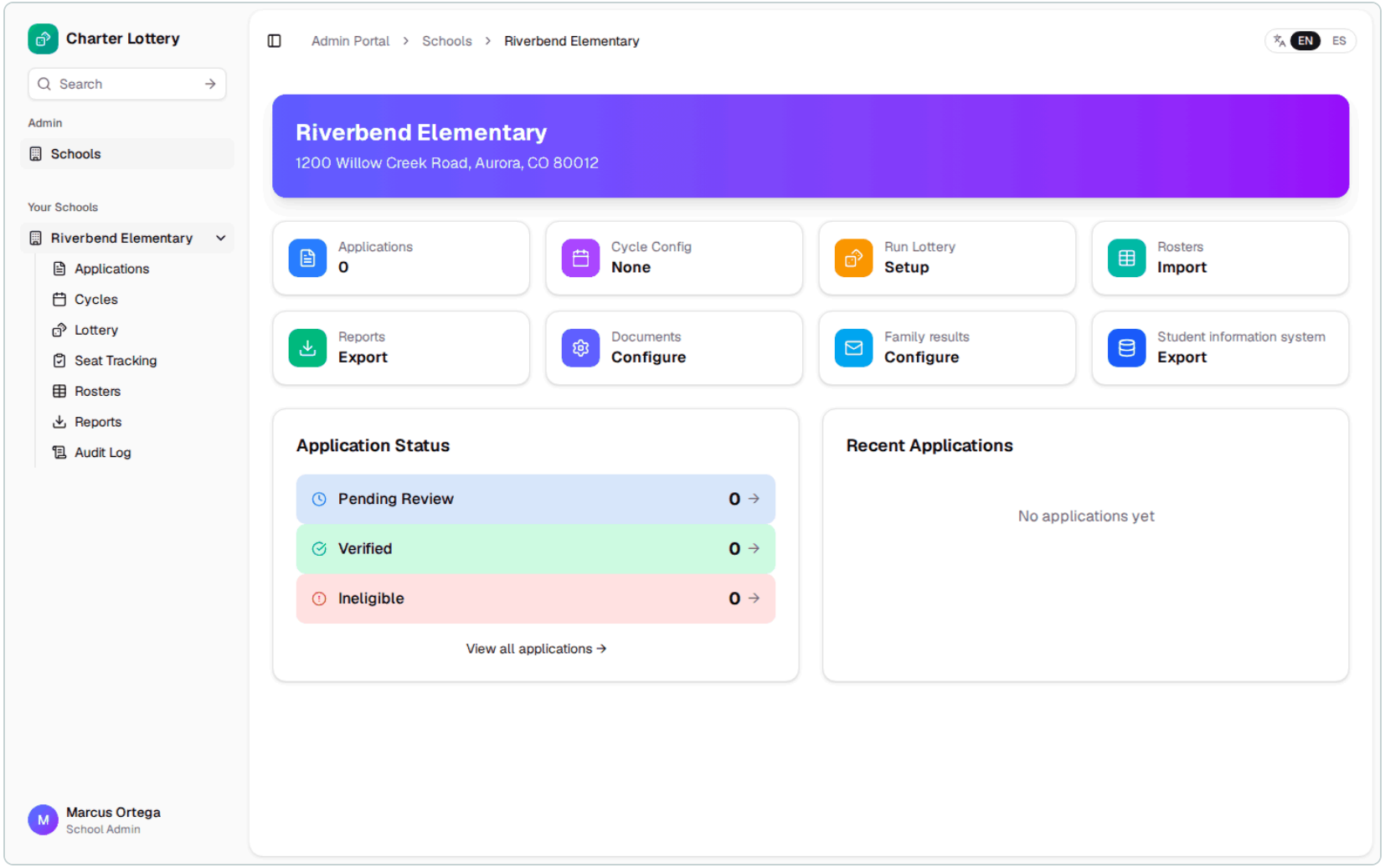
You see only the schools assigned to you. If one is missing, ask your organization admin.



One assigned school.

Step 7. The school dashboard

The tiles and the sidebar reach everything for the school. **ES** at the top switches the admin pages to Spanish.



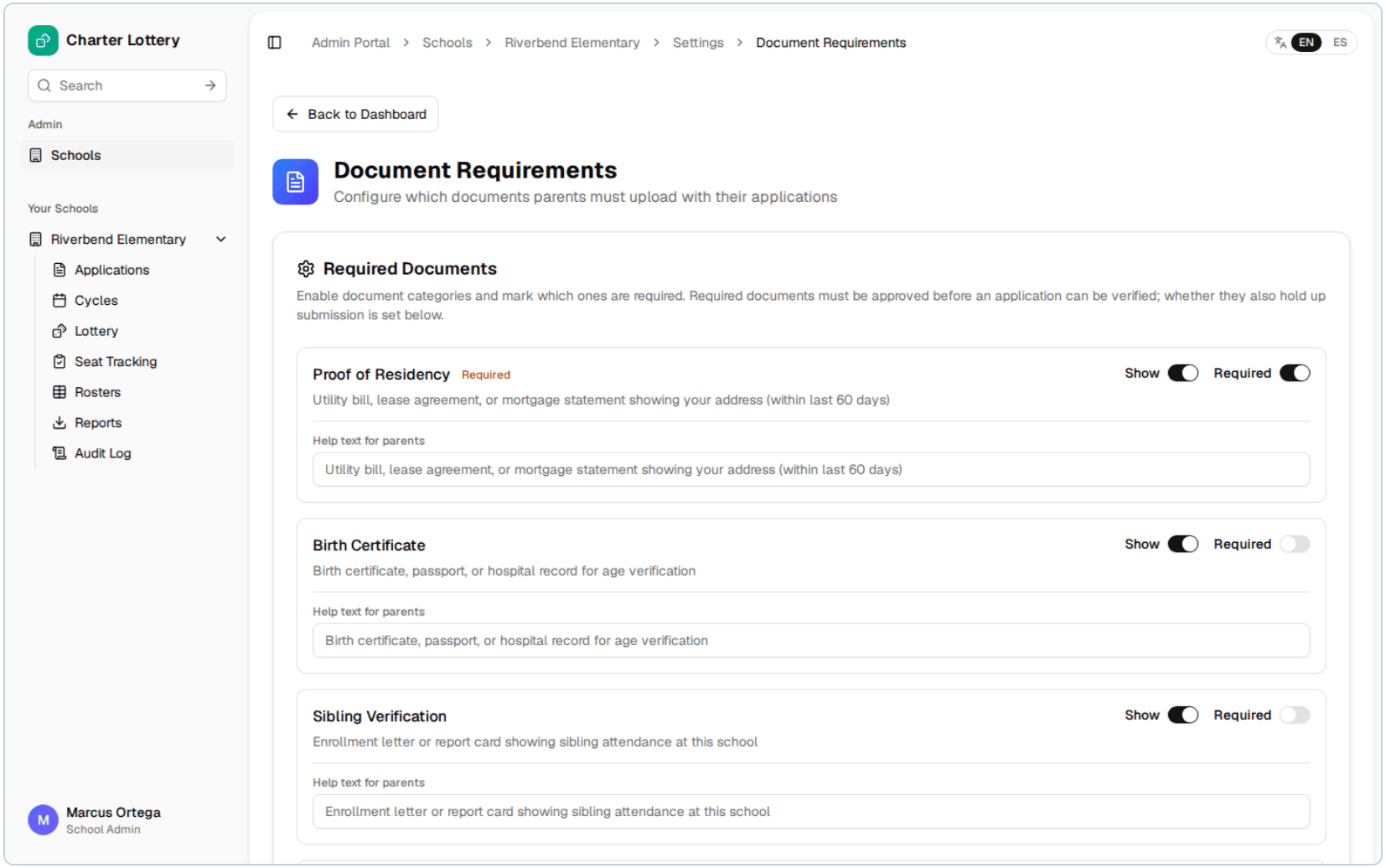
The dashboard before the season starts.

PART 3

Prepare the school

Step 8. Choose required documents

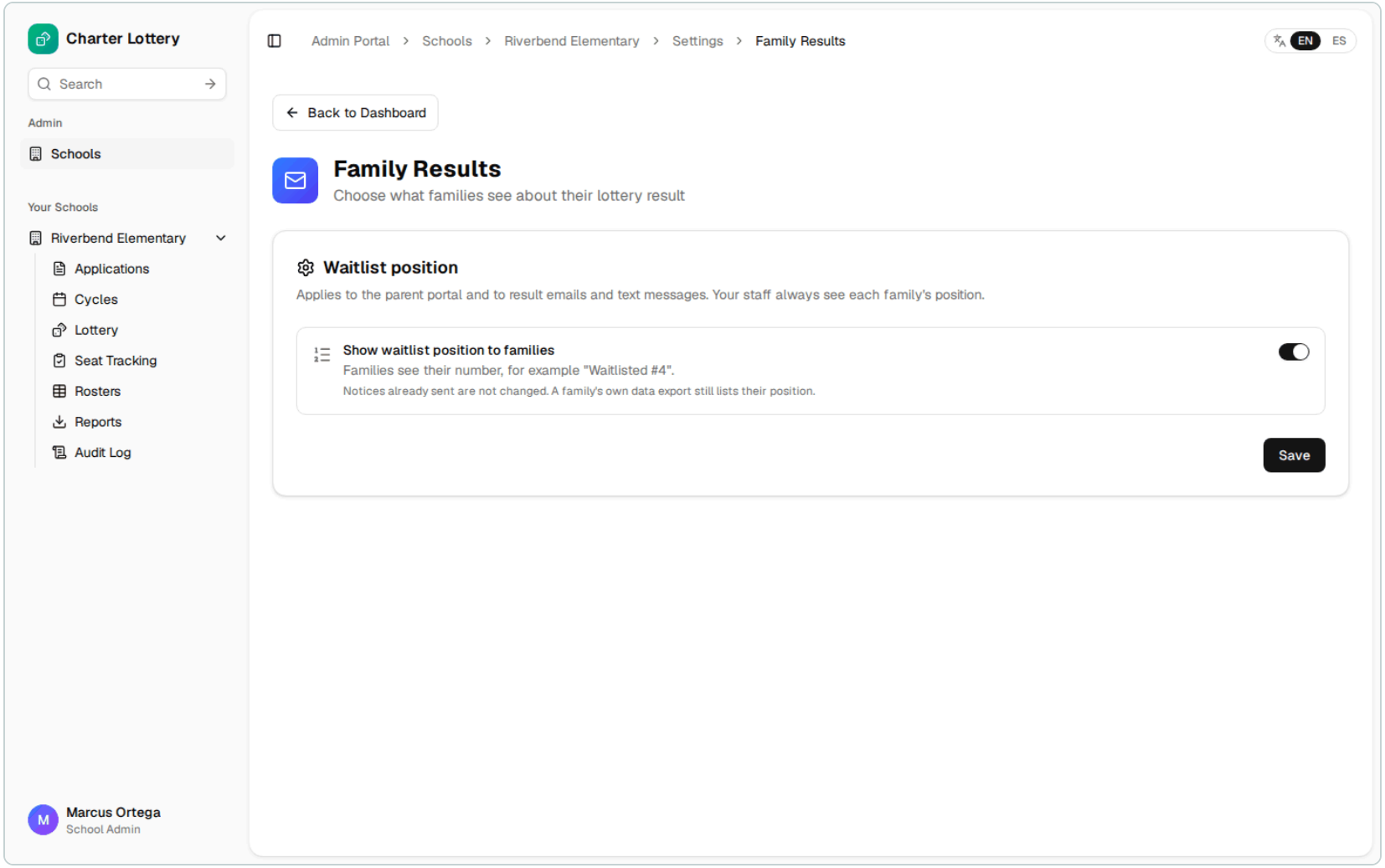
Under **Documents → Configure**, turn on what families can upload and mark what is required. A required document must be approved before you can verify an application. You choose separately whether a missing document also holds up submission.



Document requirements.

Step 9. Choose what families see

Under **Family results → Configure**, decide whether families see their waitlist number. Your staff always see it.

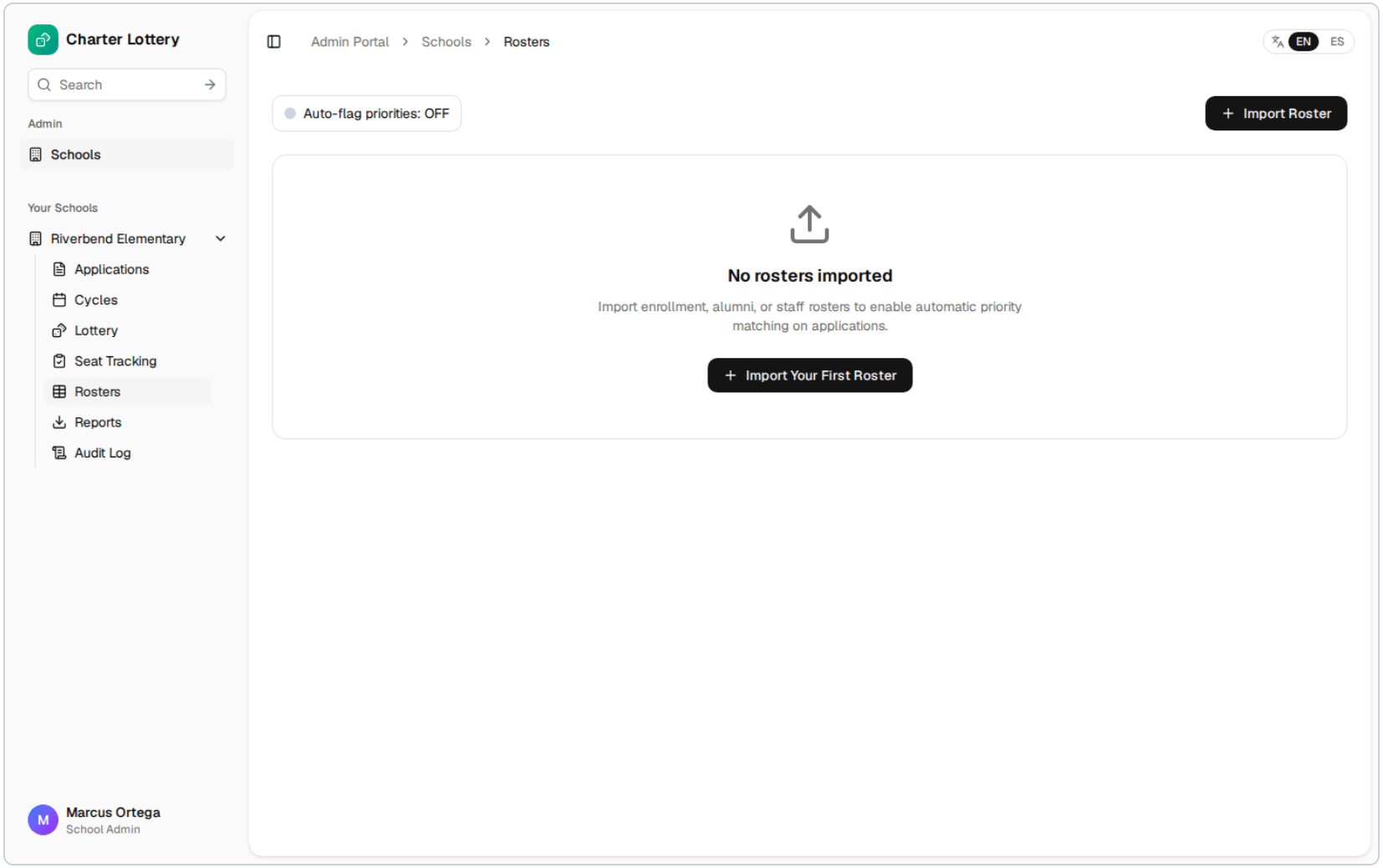


The waitlist position setting.

Step 10. Import rosters (optional)

Rosters let Charter Lottery spot siblings of current students, staff children and alumni children. Select **Import Roster**, upload a CSV or Excel file

and match its columns.



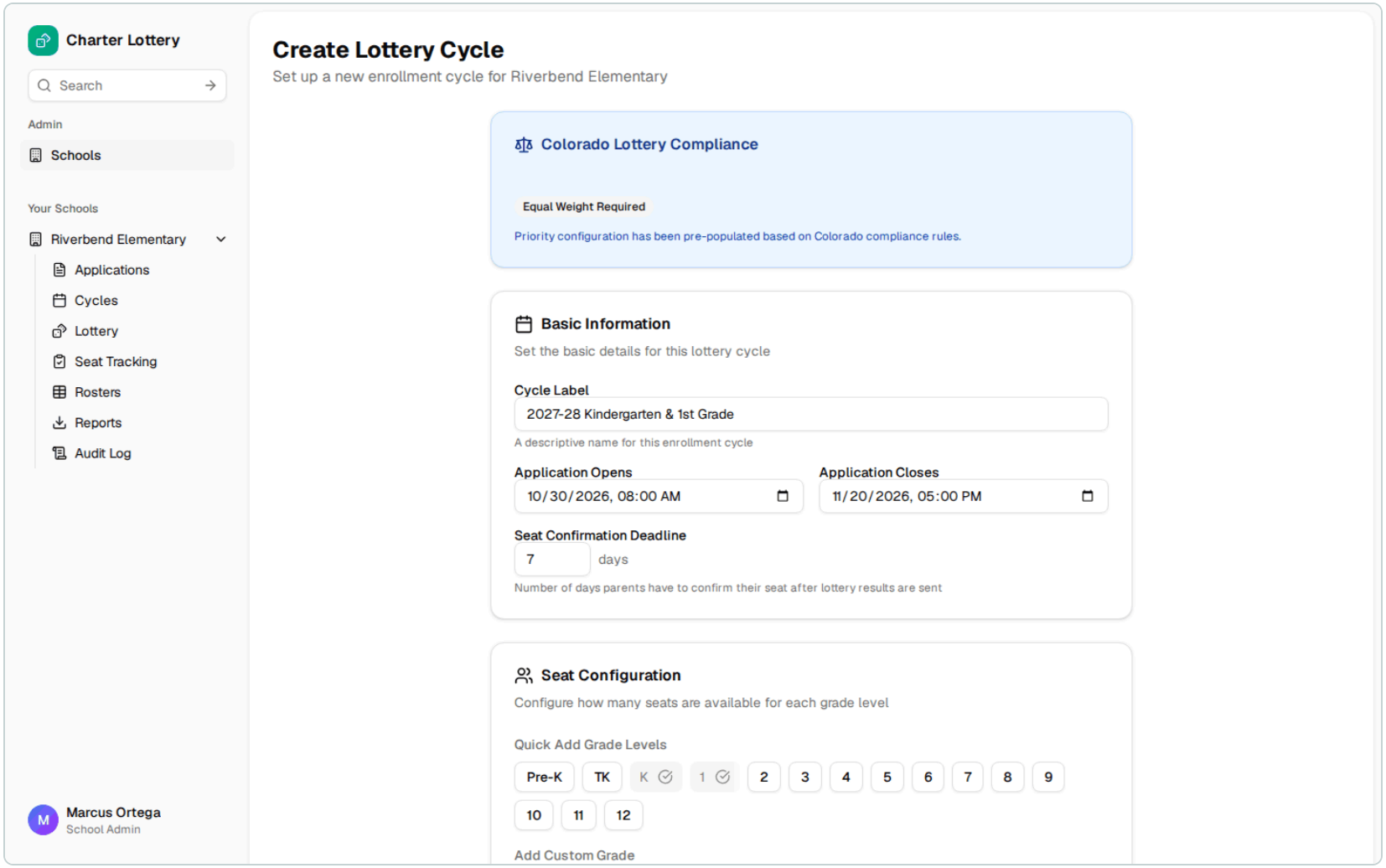
No rosters imported yet.

PART 4

Open applications

Step 11. Create the cycle

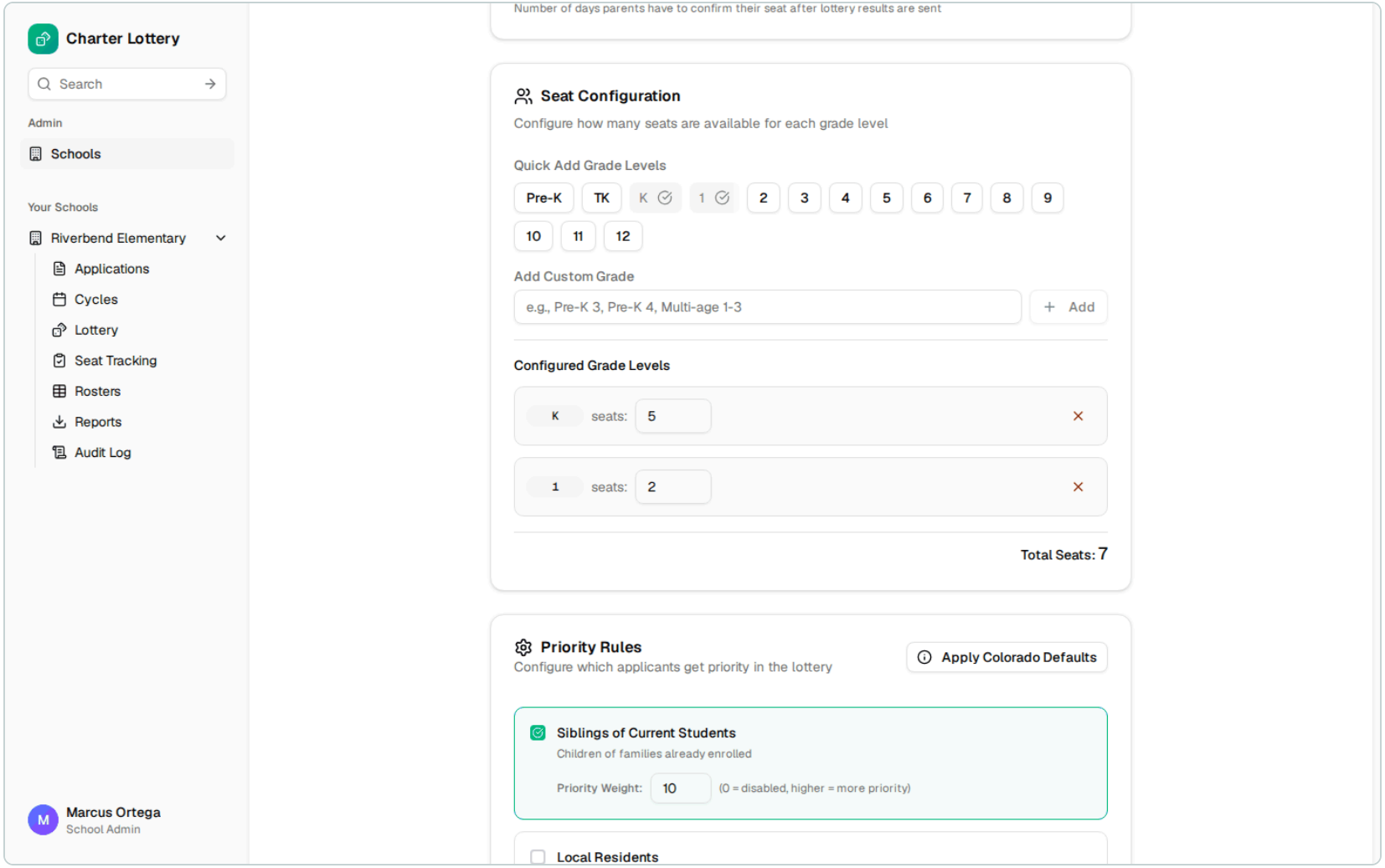
A cycle is one enrollment period. Choose **Cycles → New Cycle**. Enter a label, the dates and the days families have to accept a seat. The box at the top shows your state's lottery rules.



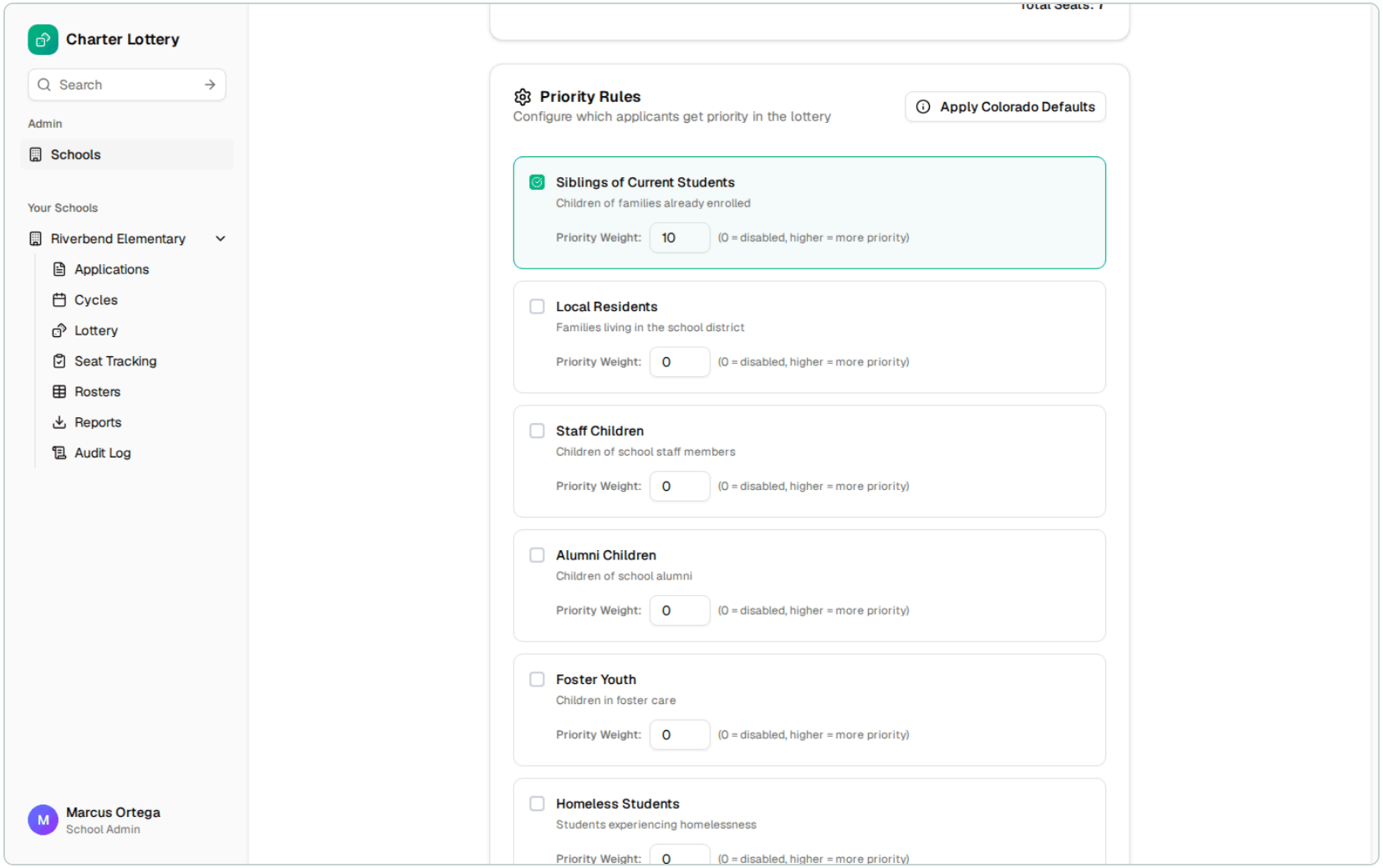
Cycle basics, with the state rule check.

Step 12. Set seats and priorities

Select each grade and enter its seats. Give a weight to each priority you use. 0 turns a priority off and a higher number means more priority.



Seats by grade.

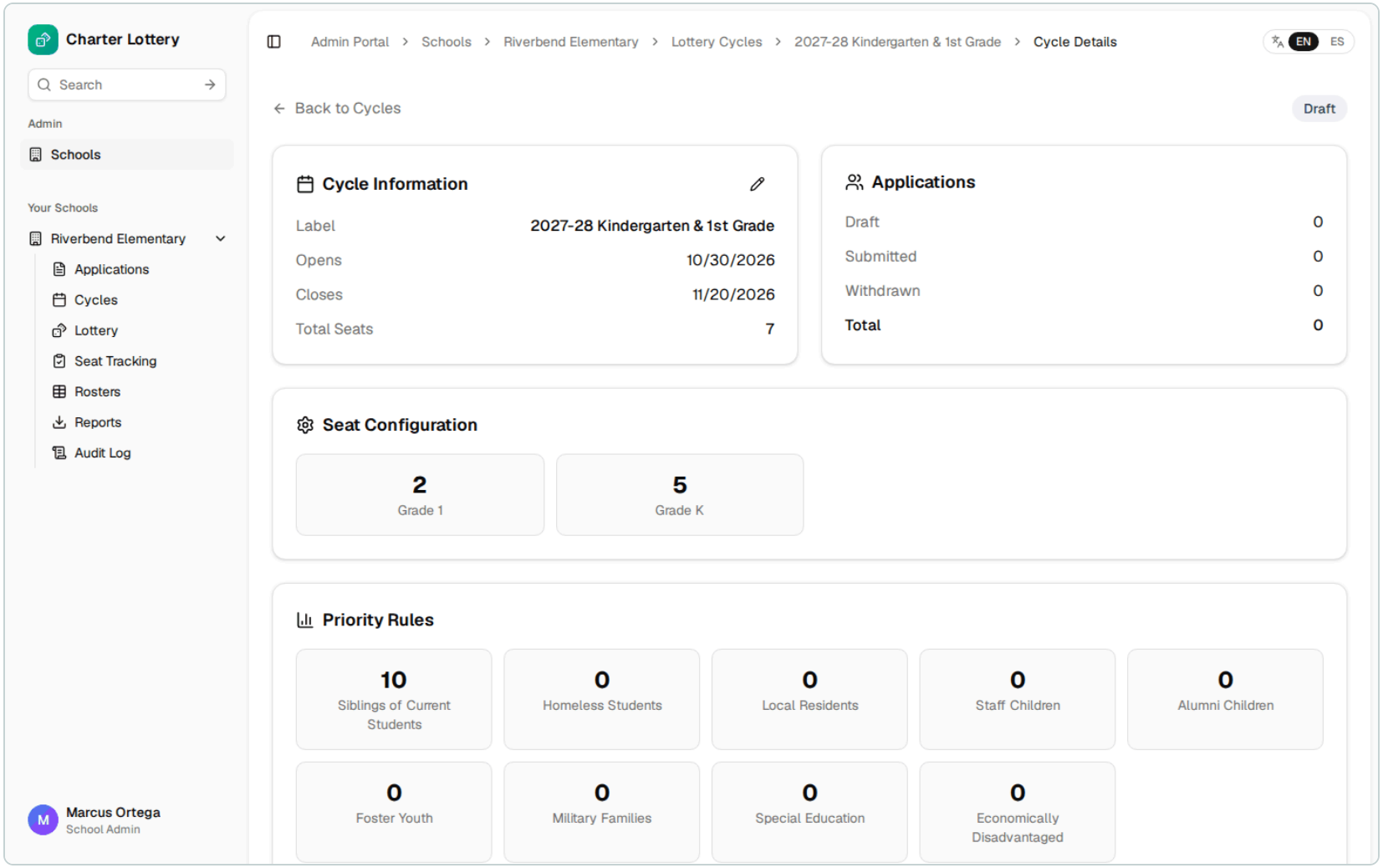


Priority rules.

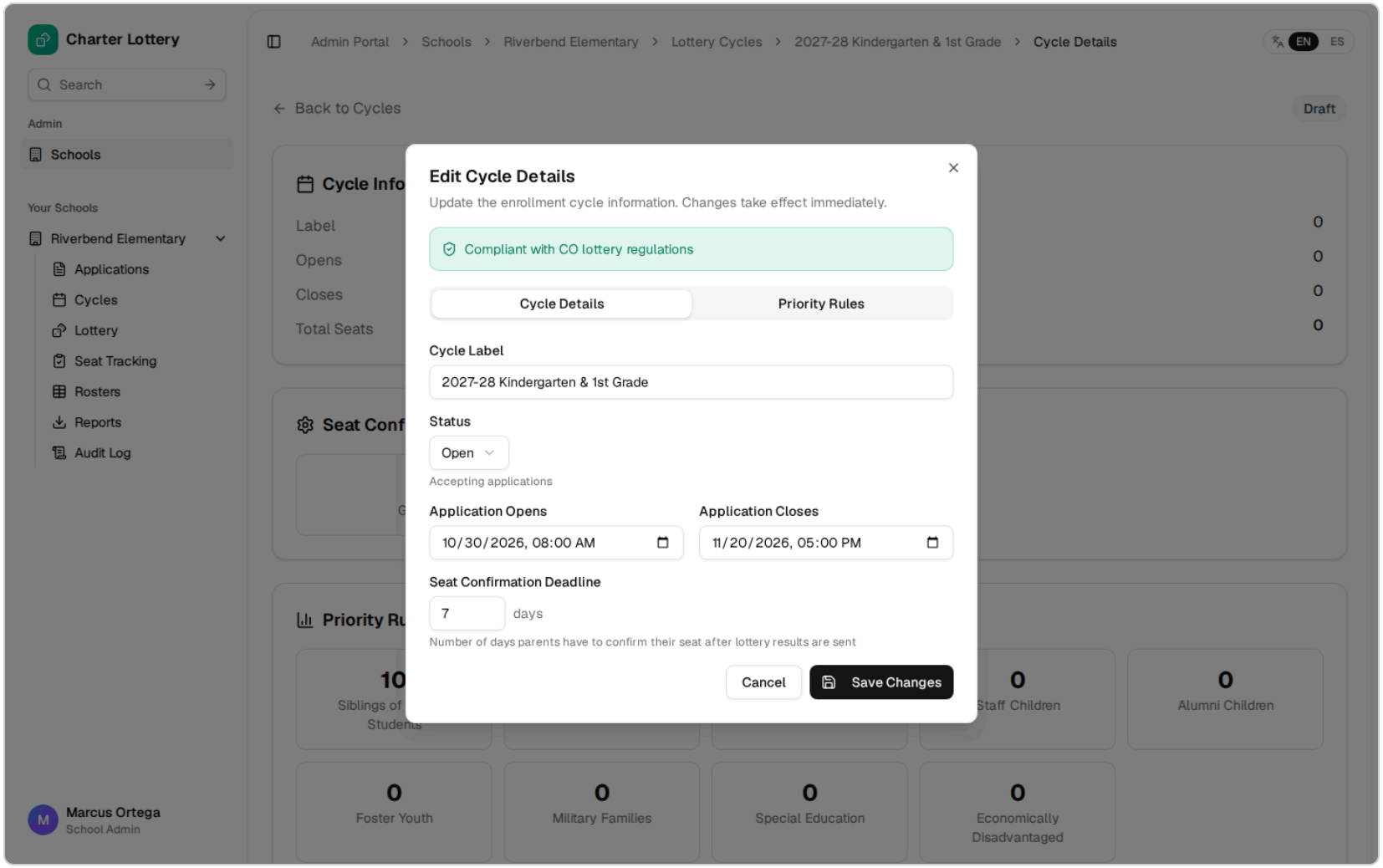
Step 13. Open the cycle

A new cycle is a **Draft**. It opens automatically overnight once its open date has passed. To open it now, select the pencil, set **Status** to **Open** and

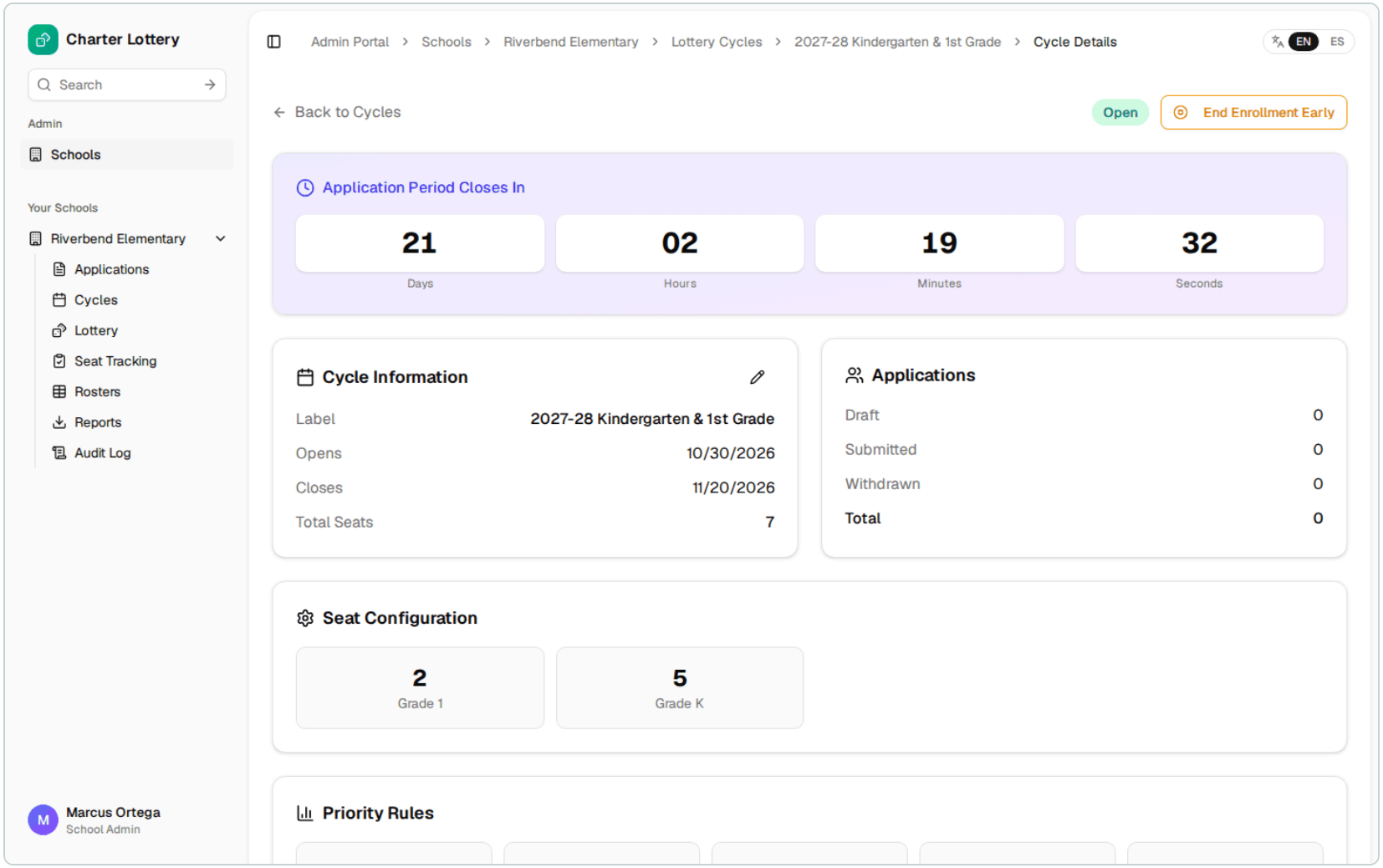
select **Save Changes**.



The cycle in Draft.



Setting the status to Open.



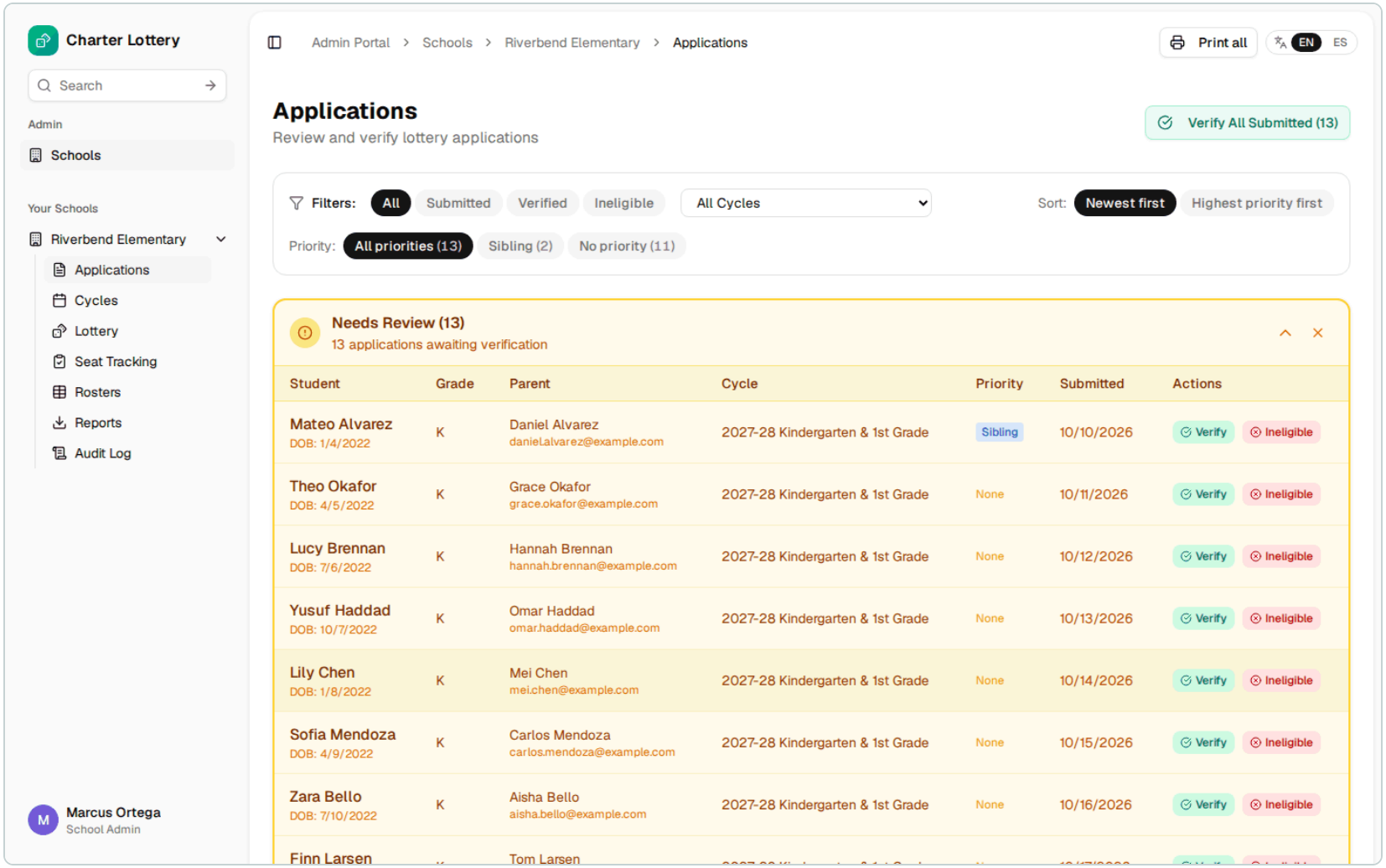
Open, with the countdown to closing.

PART 5

Review applications

Step 14. Work the queue

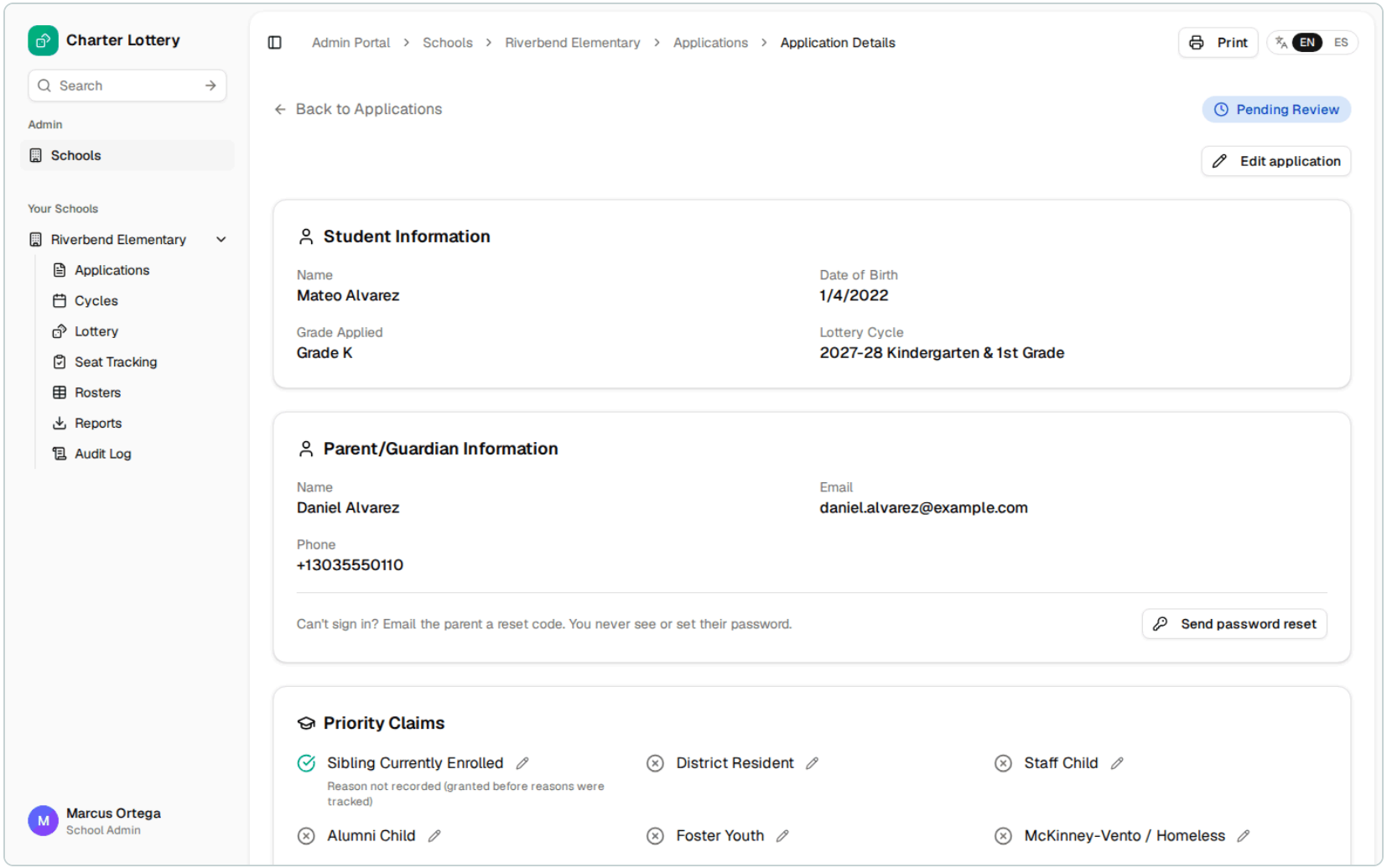
Applications lists everything, with **Needs Review** at the top. Use the filters to narrow it. **Verify All Submitted** handles applications in bulk, but review individually when documents matter.



Applications waiting for review.

Step 15. Open an application

The page shows the student, the family, priority claims and roster matches. **Send password reset** emails a family a reset code when they cannot sign in. You never see or set their password.

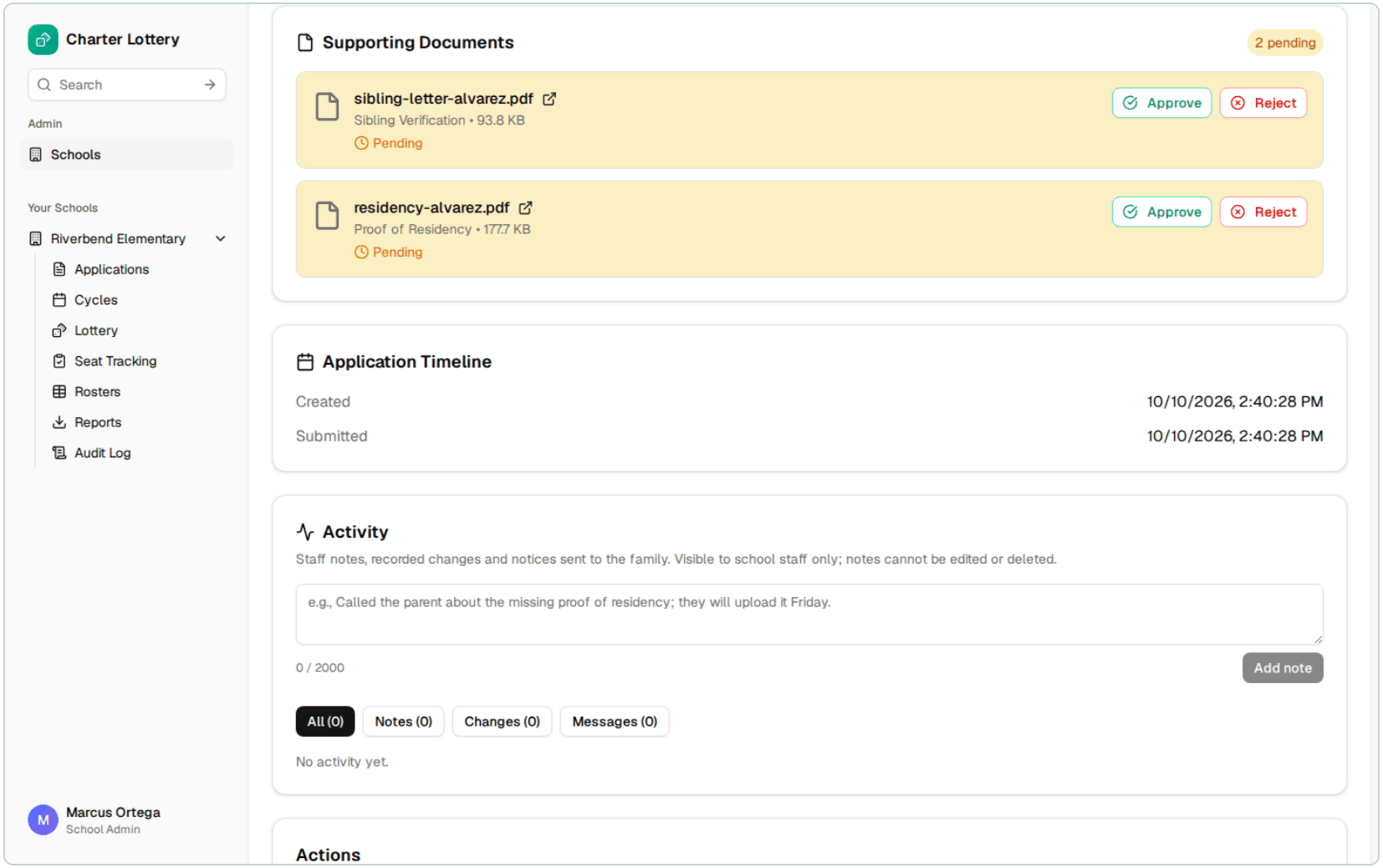


An application awaiting review.

Step 16. Review the documents

Open each file, then select **Approve** or **Reject**. A rejection needs a reason, and the family can upload again.

Use **Activity** to keep a staff note. Families cannot see it, and notes cannot be edited or deleted.

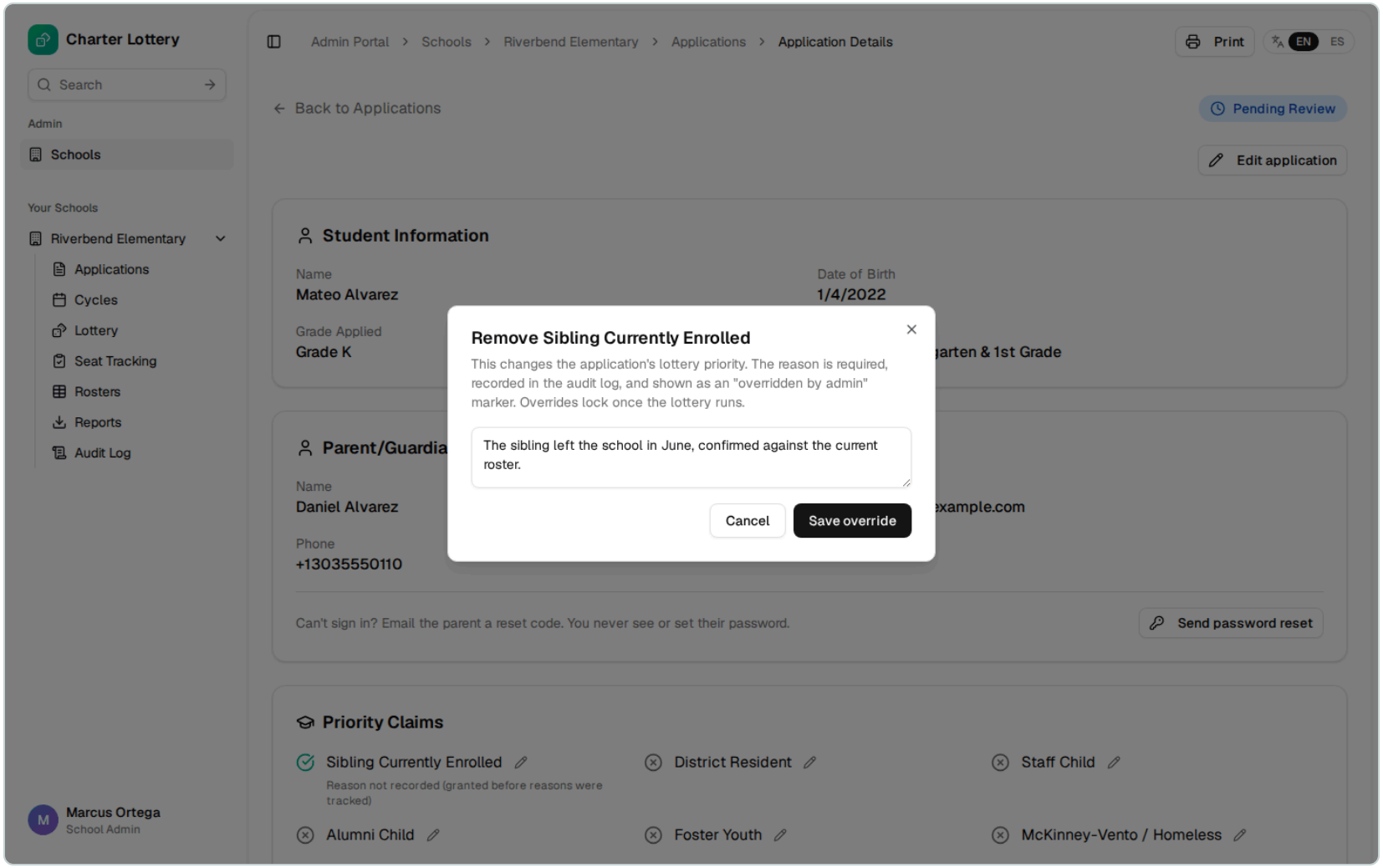


Two documents pending, with staff activity below.

Step 17. Correct a priority

Select the pencil beside a priority to add or remove it. A reason is required, the change goes in the audit log, and overrides lock once the lottery

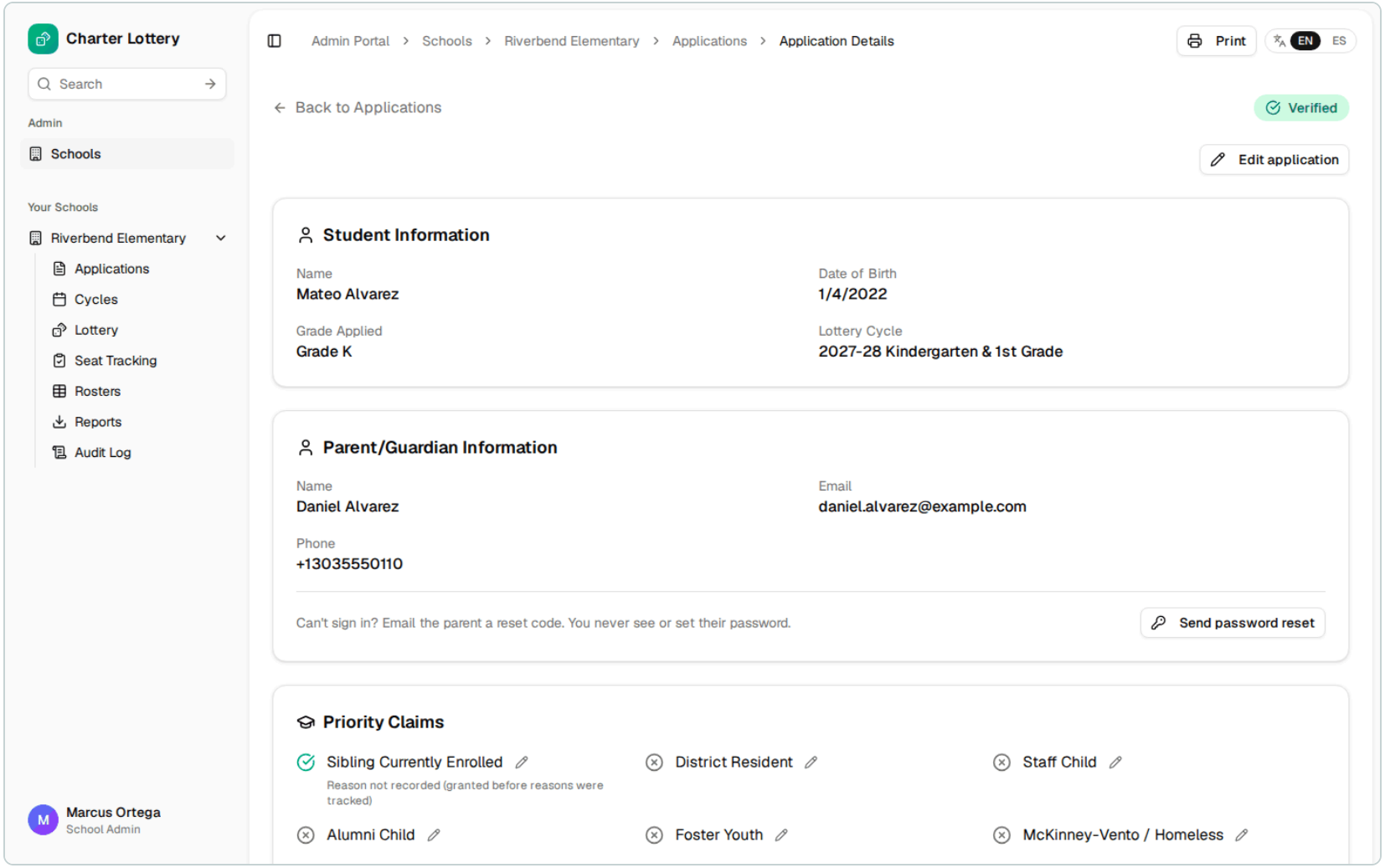
runs.



Removing a priority, with the reason.

Step 18. Verify

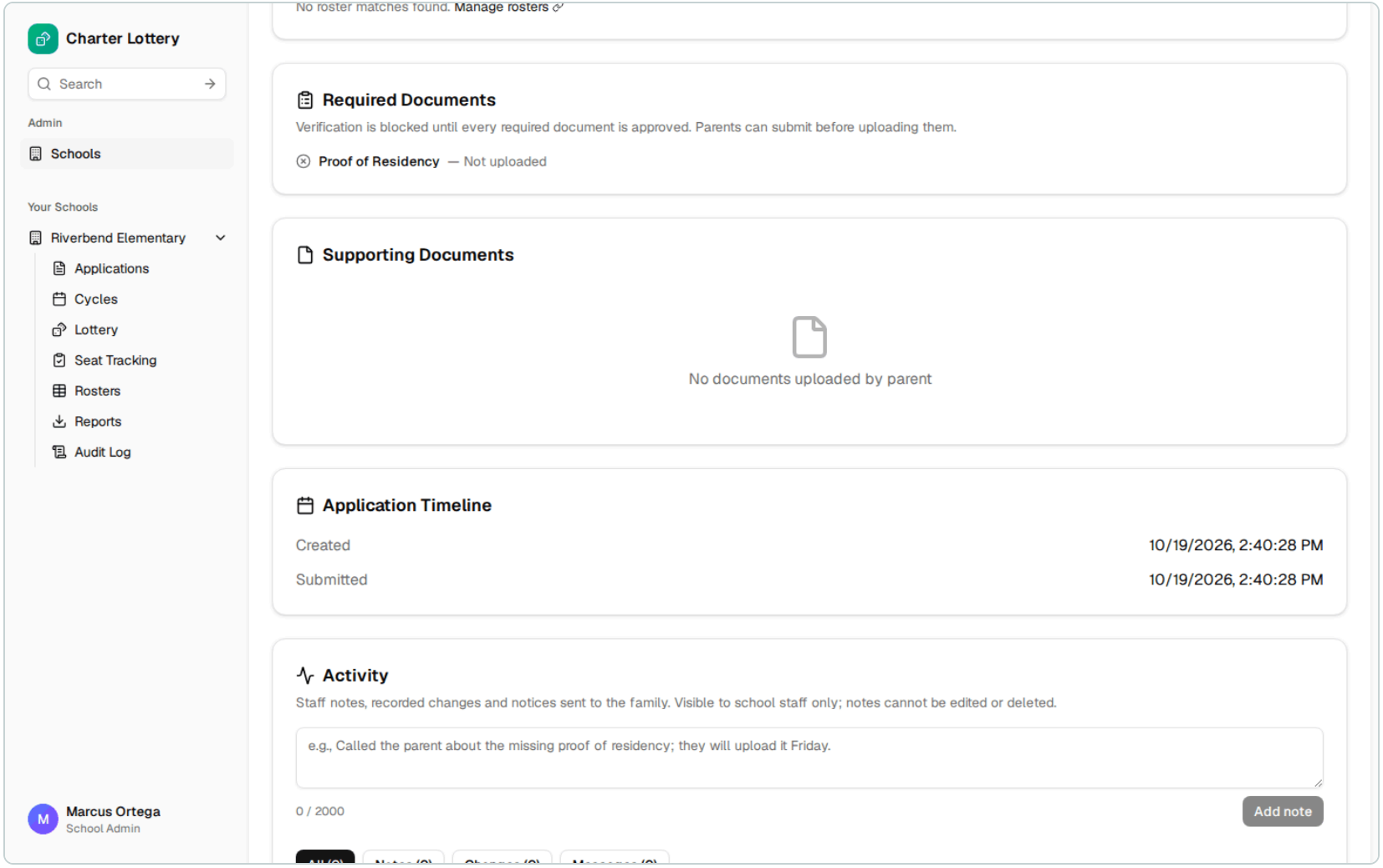
Select **Verify** when the application is complete. **Only verified applications go into the lottery.**



A verified application.

Step 19. When a required document is missing

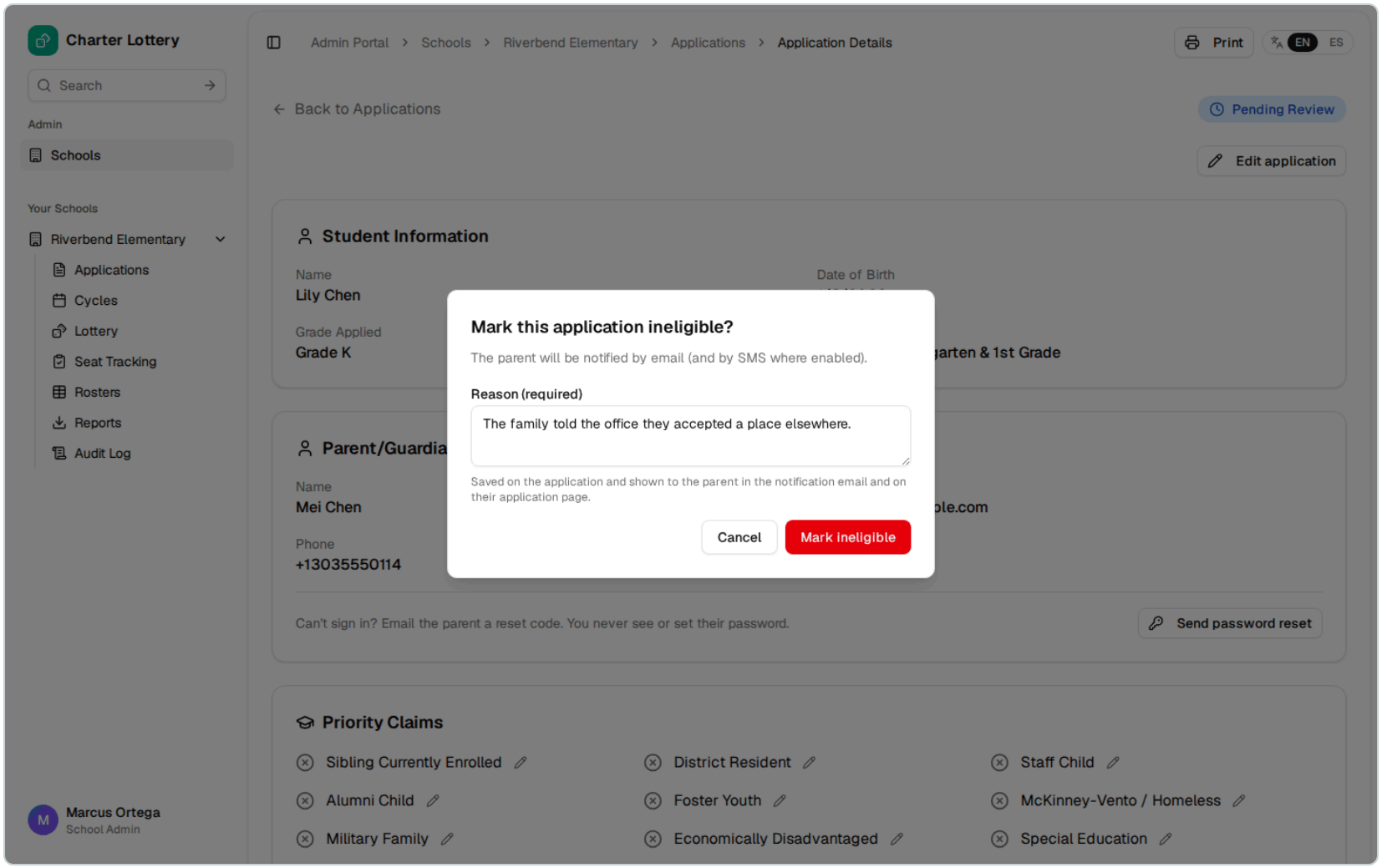
You cannot verify until every required document is approved. Contact the family, and record the call in **Activity**.



Proof of Residency has not been uploaded.

Step 20. Mark an application ineligible

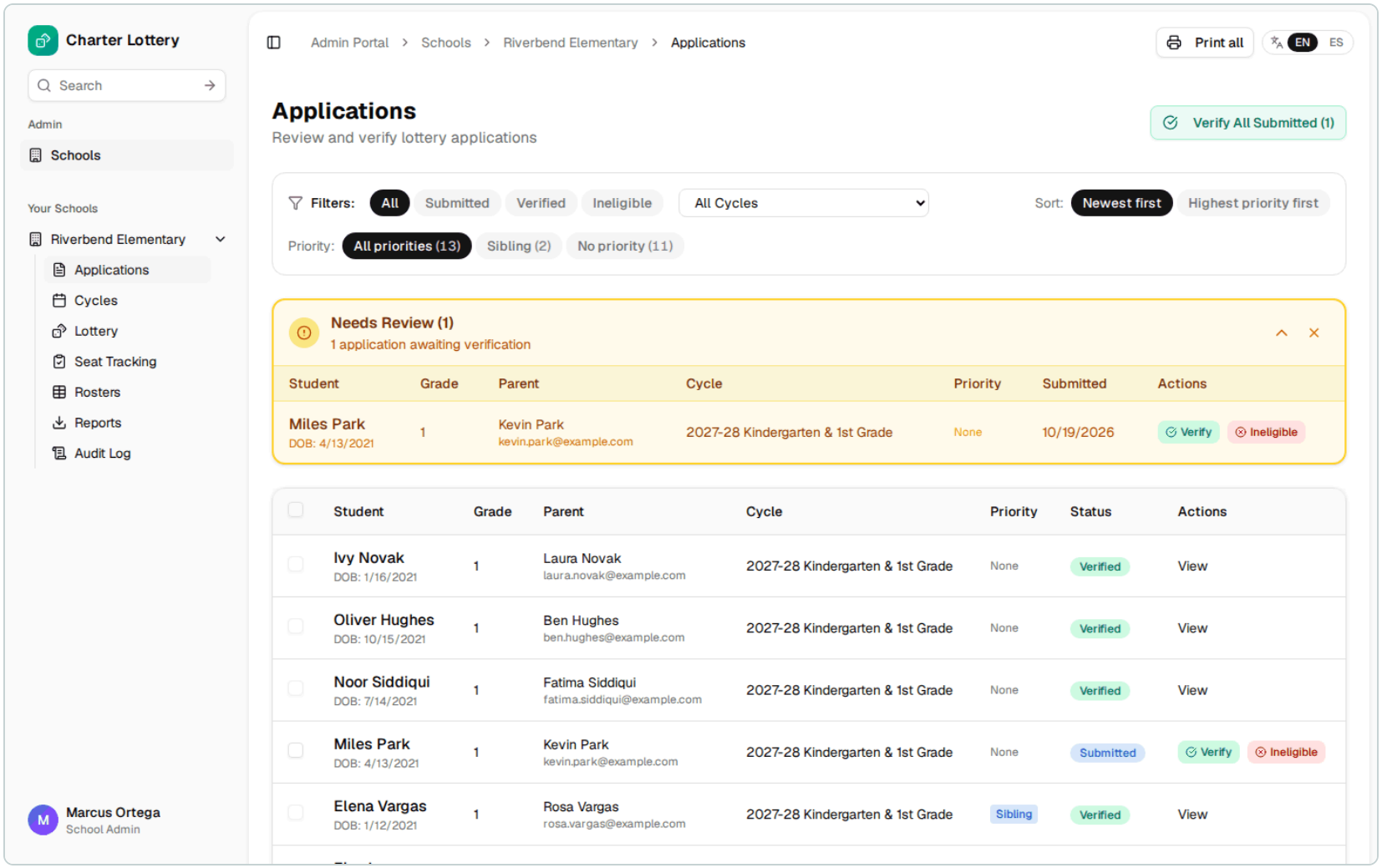
Select **Ineligible** and enter a reason. The family sees that reason in their notice and on their application page, so write it for them.



The reason is required and is shown to the family.

Step 21. Clear the queue

Before closing, make sure **Needs Review** is empty or that each remaining application is held for a reason.



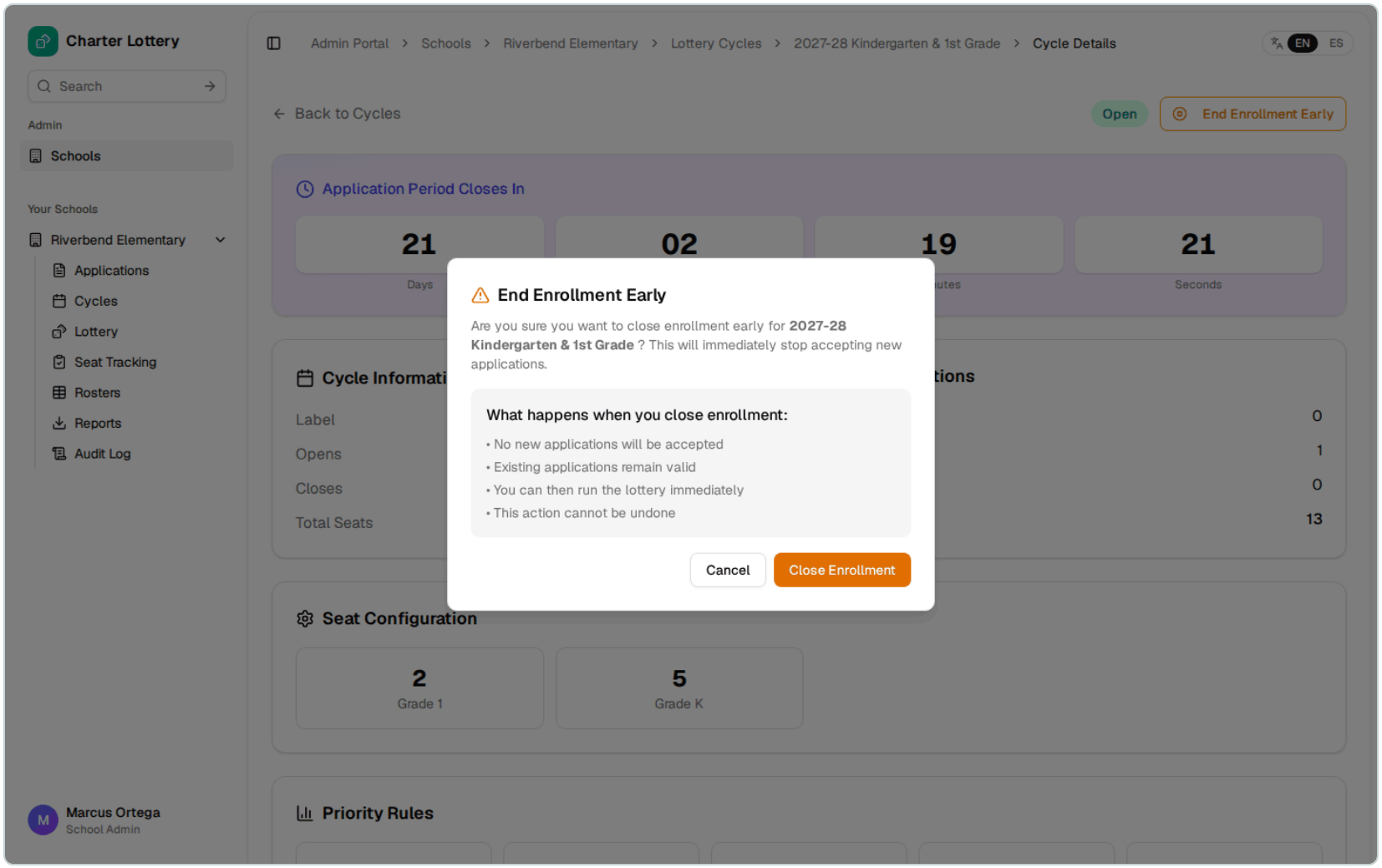
One application left unverified.

PART 6

Run the lottery

Step 22. Close enrollment

The cycle closes on its closing date. To close it sooner, select **End Enrollment Early**. This cannot be undone.

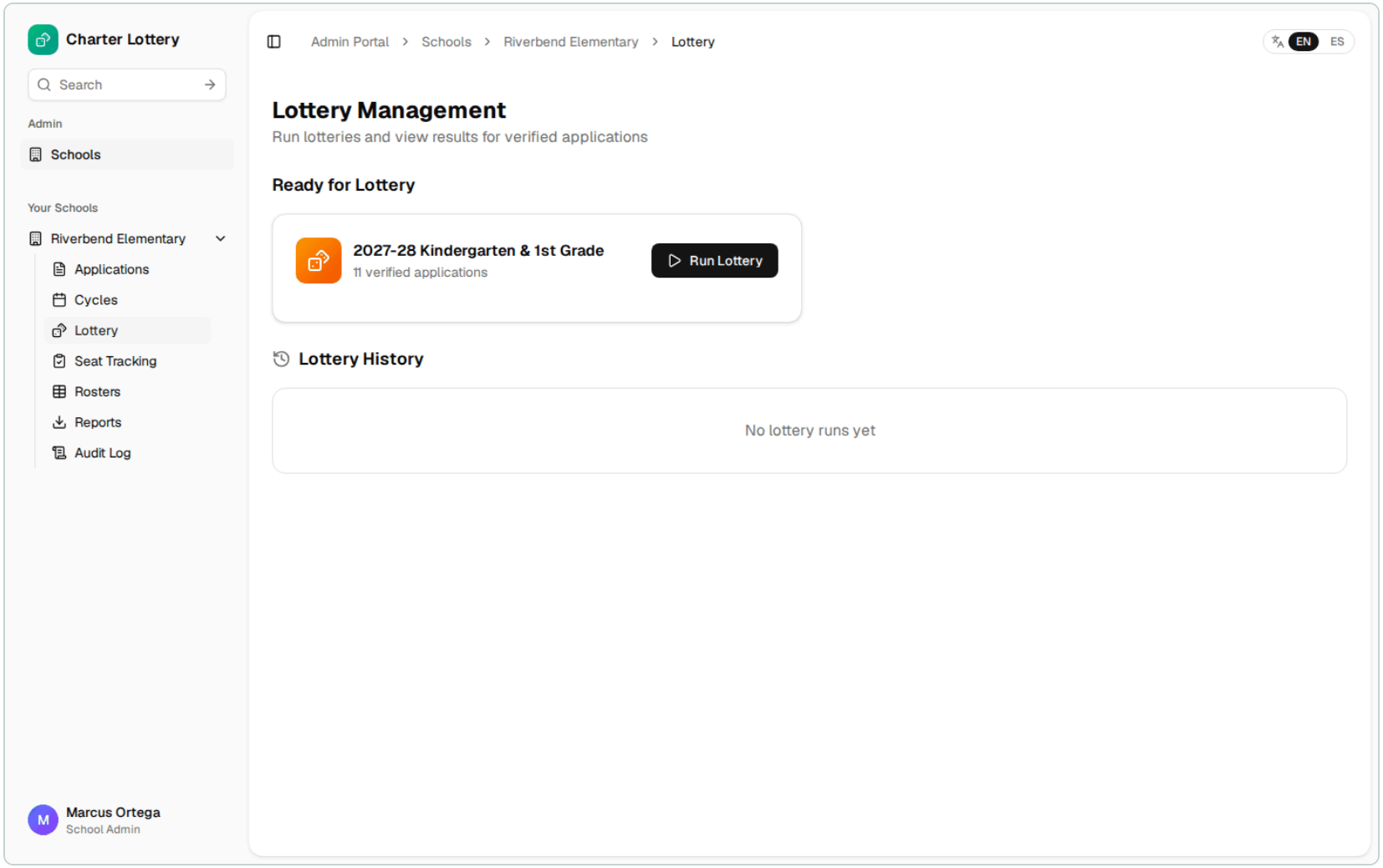


Closing enrollment early.

Step 23. Start the lottery

Choose **Lottery**, then **Run Lottery**. If the organization pays per school and this school has no subscription, Charter Lottery asks you to

subscribe first.

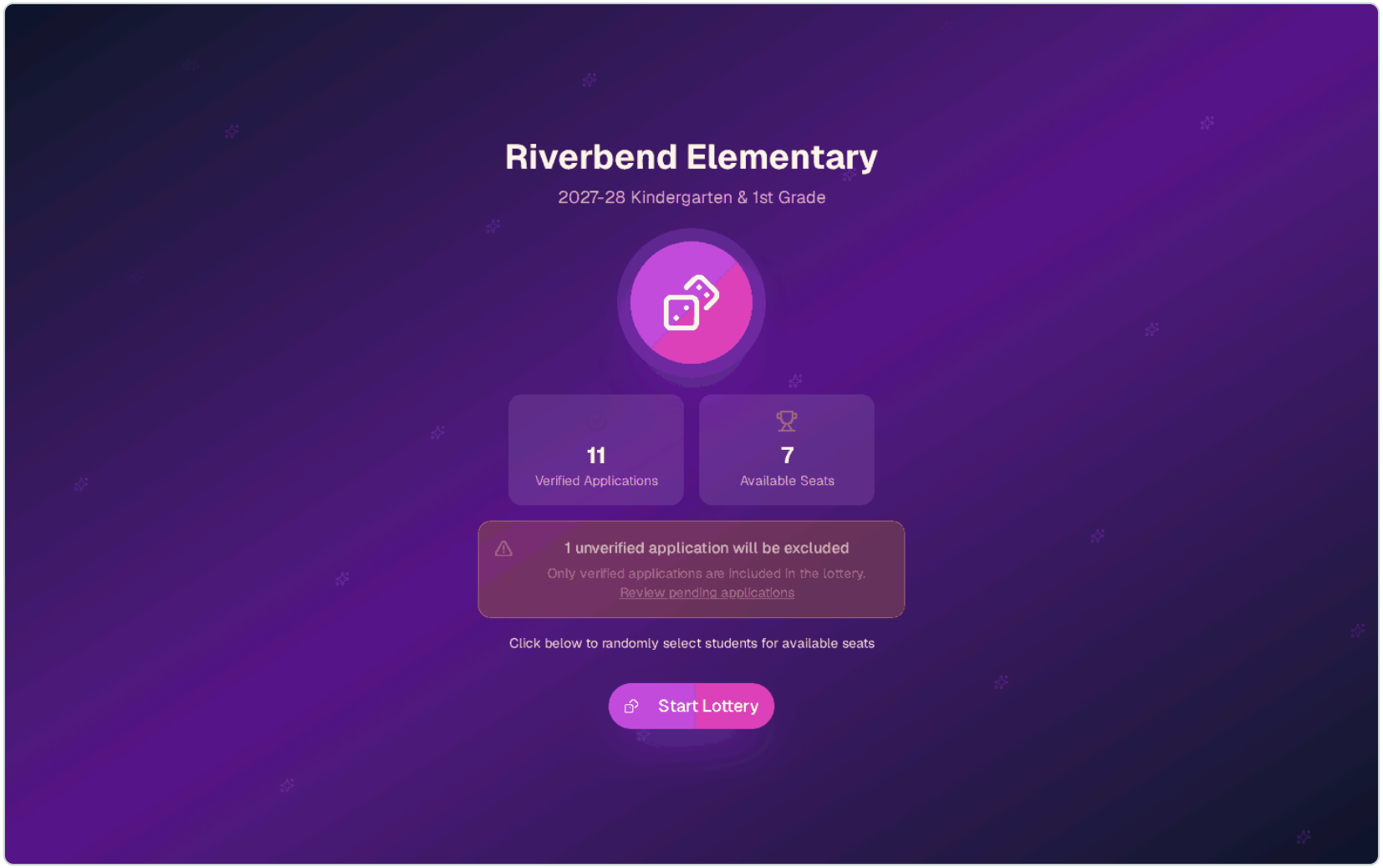


The cycle is ready.

Step 24. Check the numbers

The page shows verified applications, seats, and how many unverified applications will be left out. If that number is wrong, go back and review

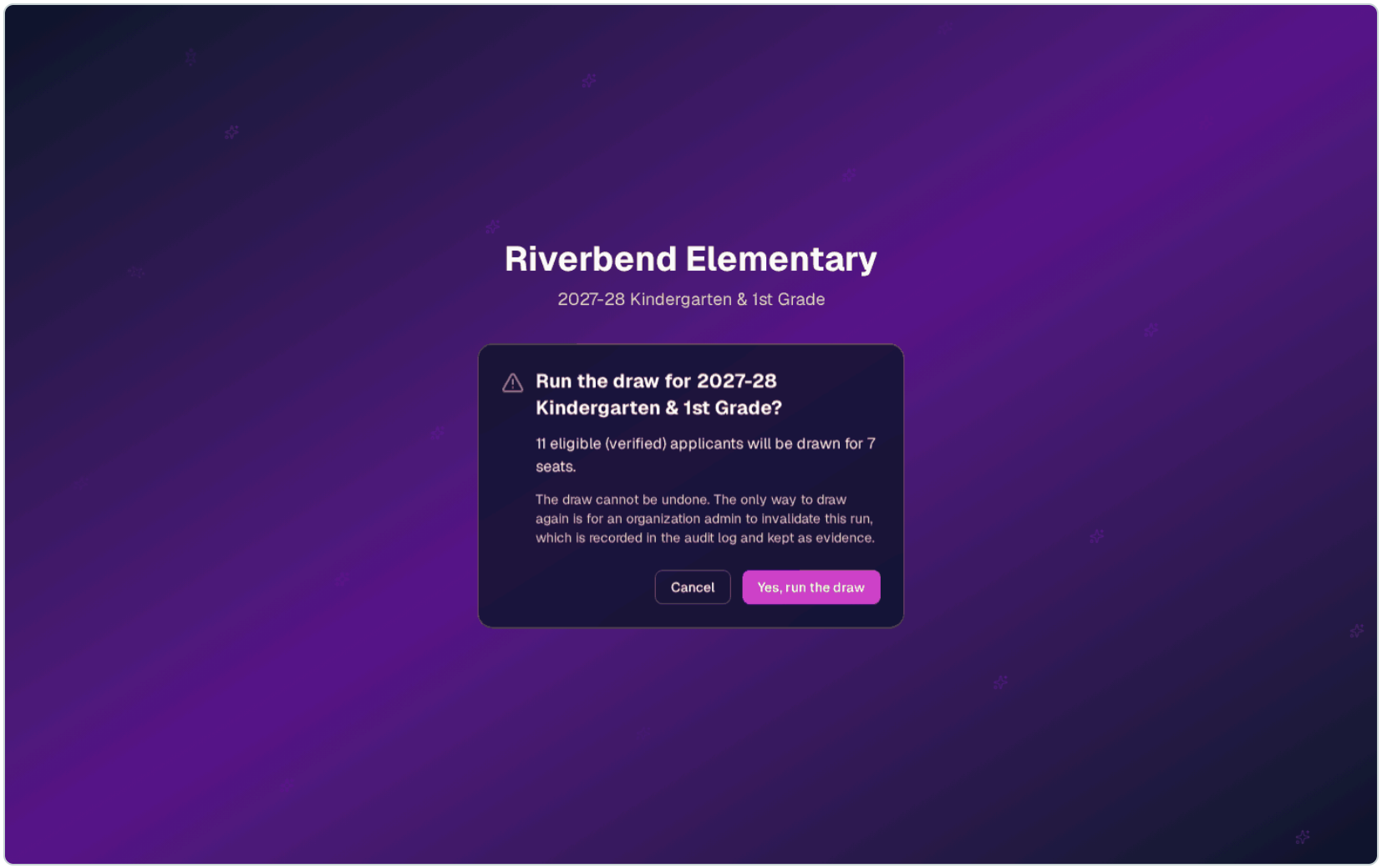
them now. Select **Start Lottery**.



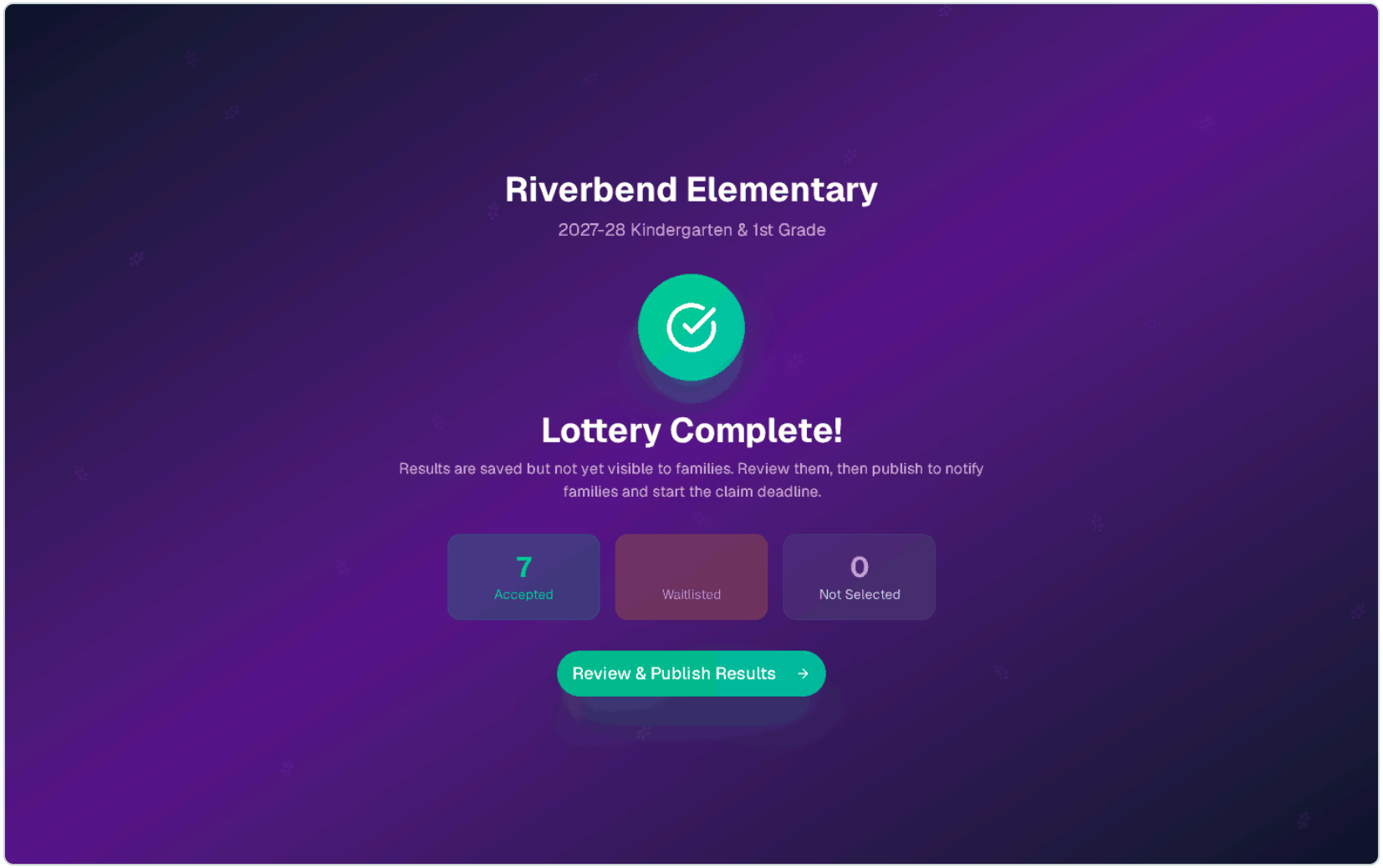
11 verified applications for 7 seats.

Step 25. Confirm the draw

The draw cannot be undone. Only an organization admin can invalidate a run, and that is recorded as evidence. Select **Yes, run the draw**.



The final confirmation.



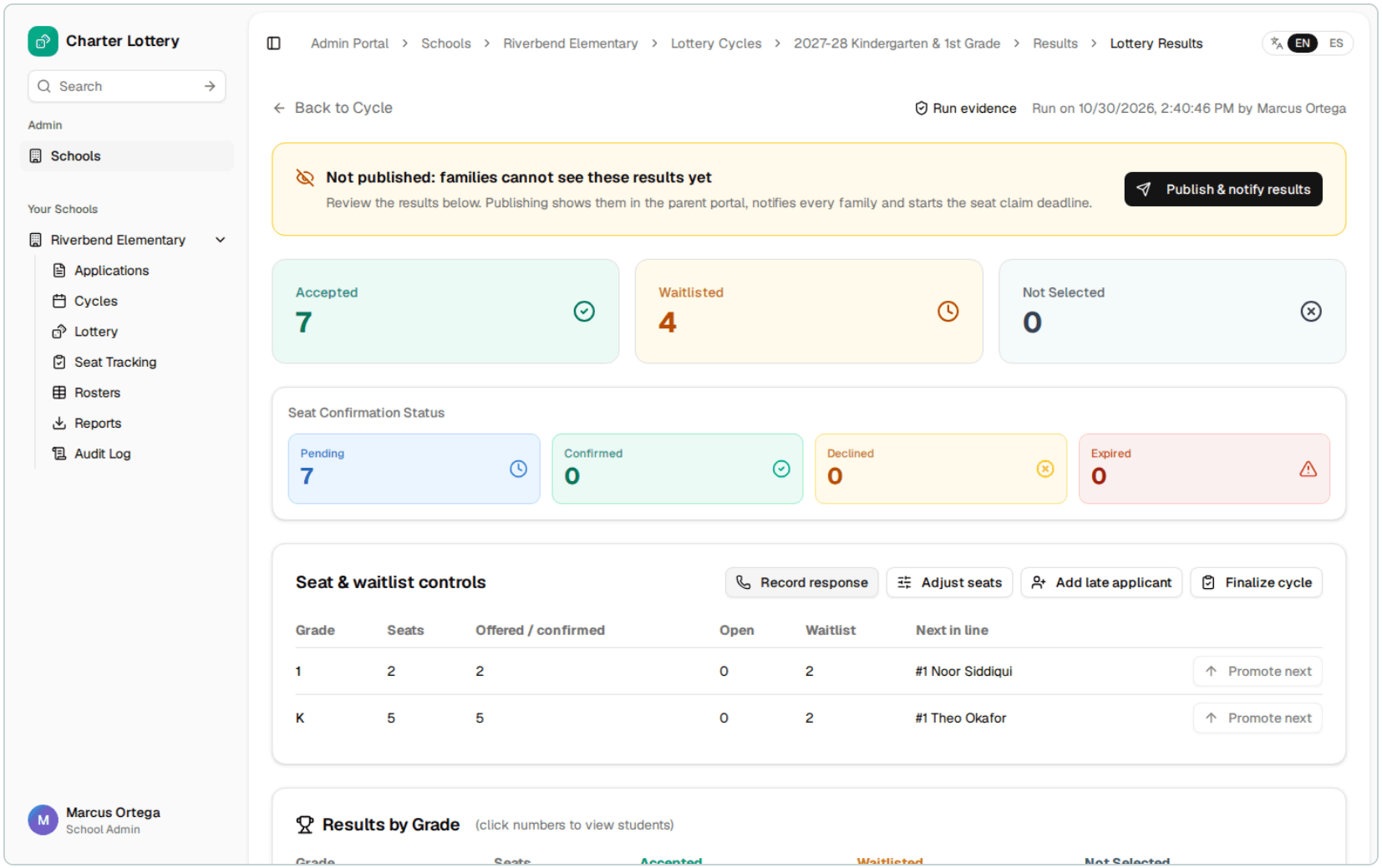
The draw is complete and families have not been told.

PART 7

Publish results

Step 26. Review before publishing

Results are saved but hidden. Check each grade. Everyone not offered a seat goes on the waitlist in draw order.

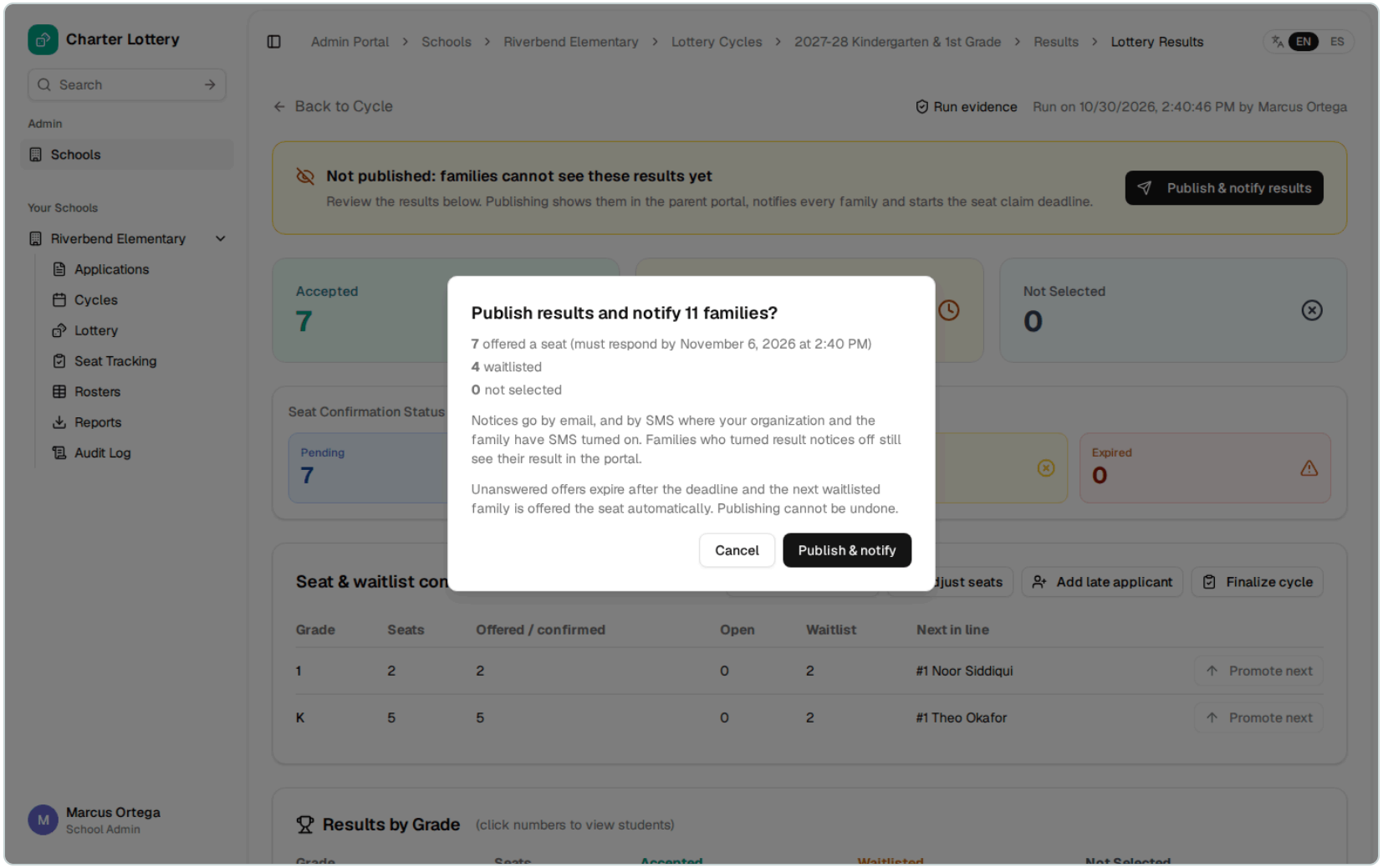


Not published: families cannot see these yet.

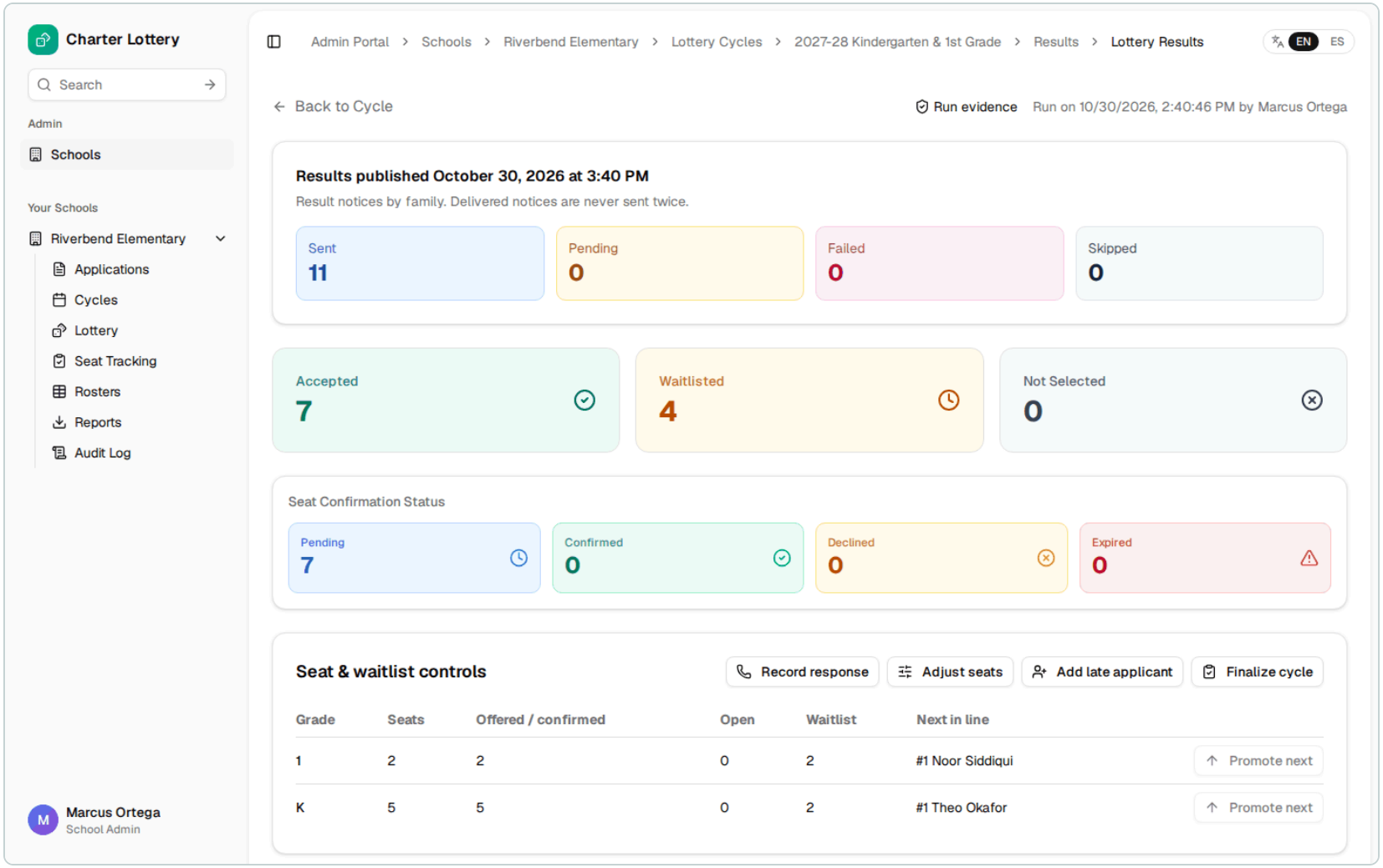
Step 27. Publish and notify

Select **Publish & notify results**. The dialog shows how many families will be told and the deadline to respond. **Publishing cannot be undone.**

Afterward, check the Sent and Failed counts.



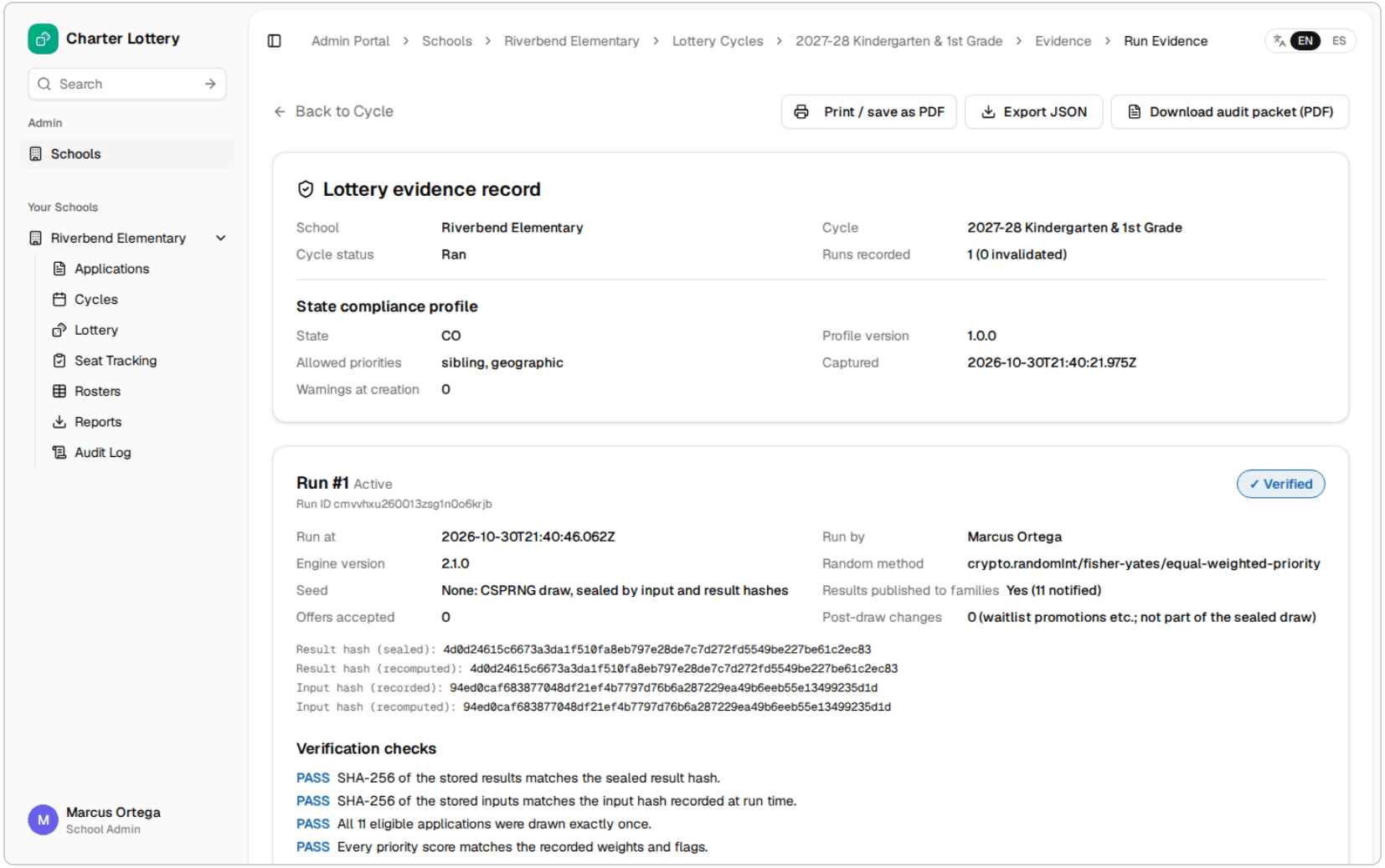
The publish confirmation.



Published, with delivery counts.

Step 28. Keep the evidence

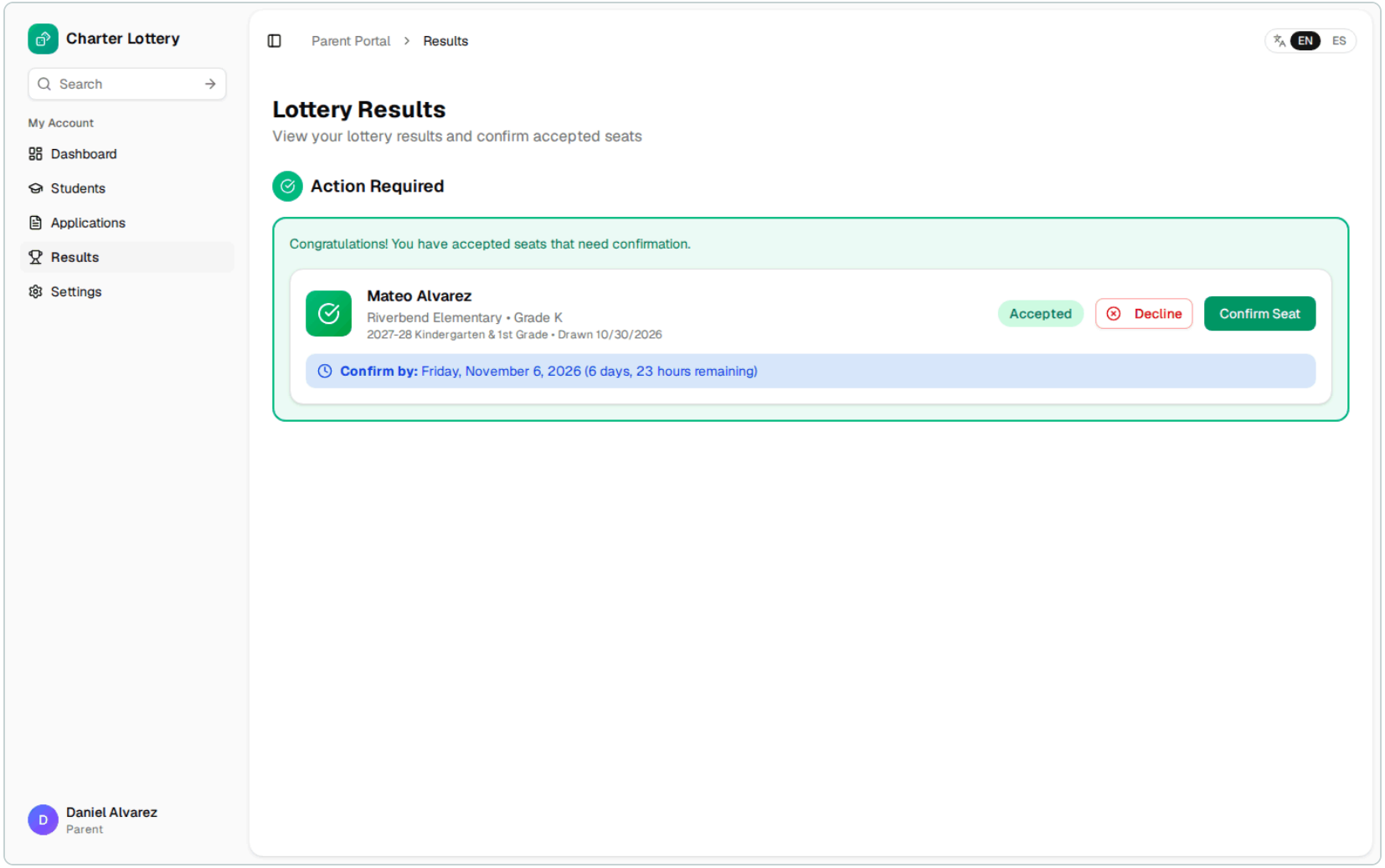
Run evidence holds the record of the draw, its verification checks and the **audit packet** PDF. This is what you show a board or authorizer.



The evidence record.

Step 29. What a family sees

A family with an offer sees **Confirm Seat** and **Decline**, with the deadline.



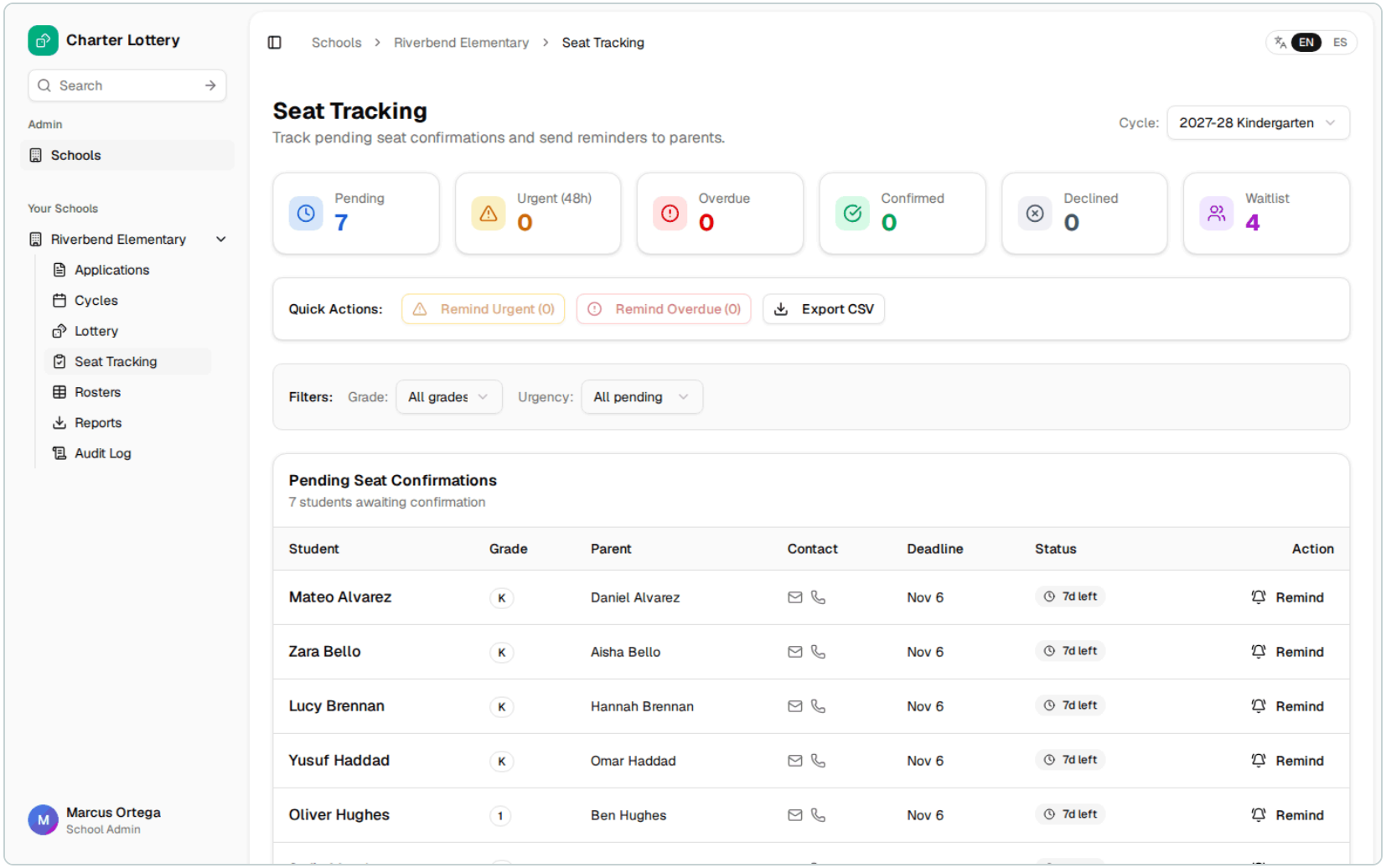
A family's result in the parent portal.

PART 8

Manage seats and the waitlist

Step 30. Track responses

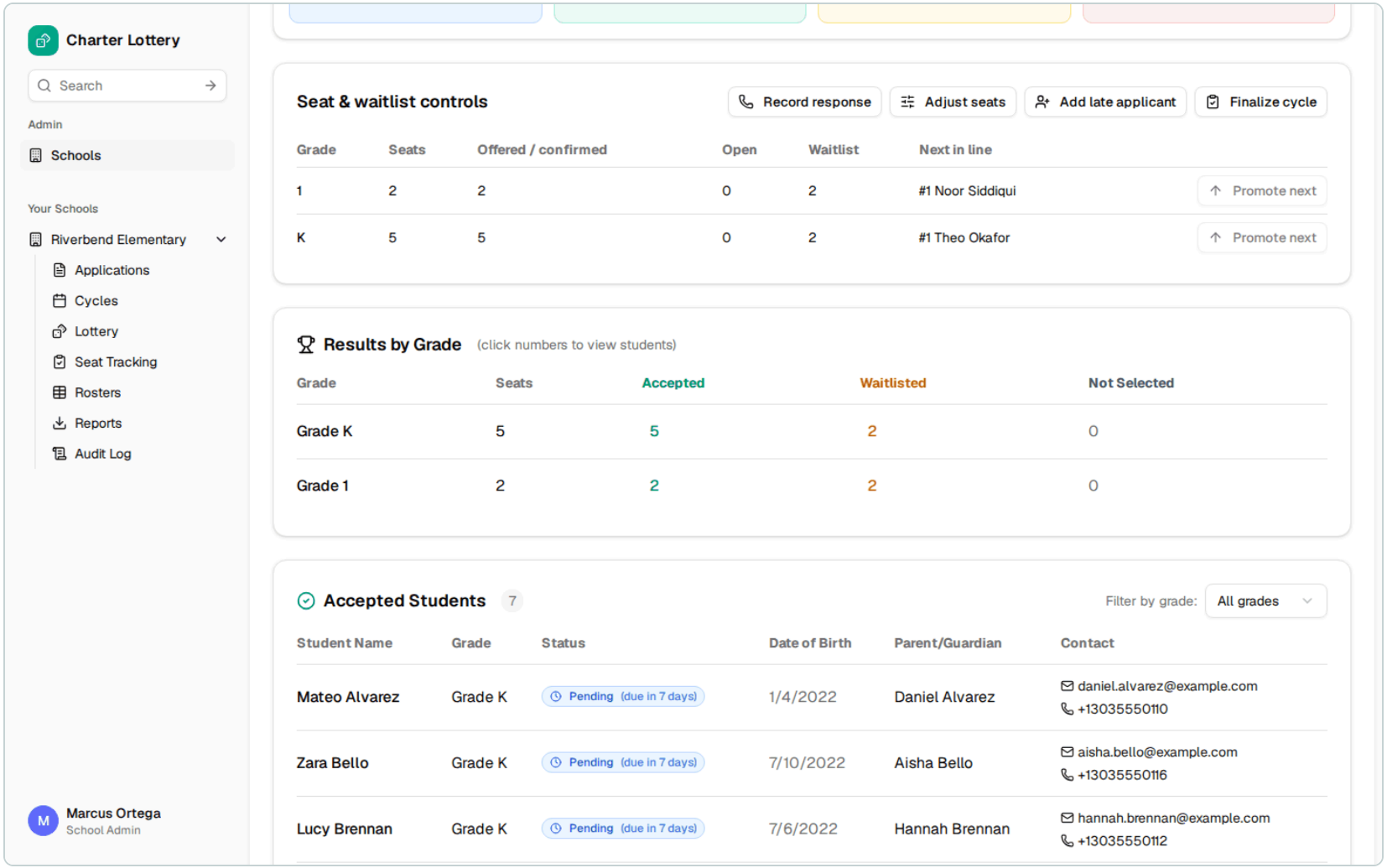
Seat Tracking shows who has not answered and who is close to their deadline. Select **Remind** for one family, or use the quick actions. Charter Lottery also sends automatic reminders.



Pending offers and reminders.

Step 31. Use the seat controls

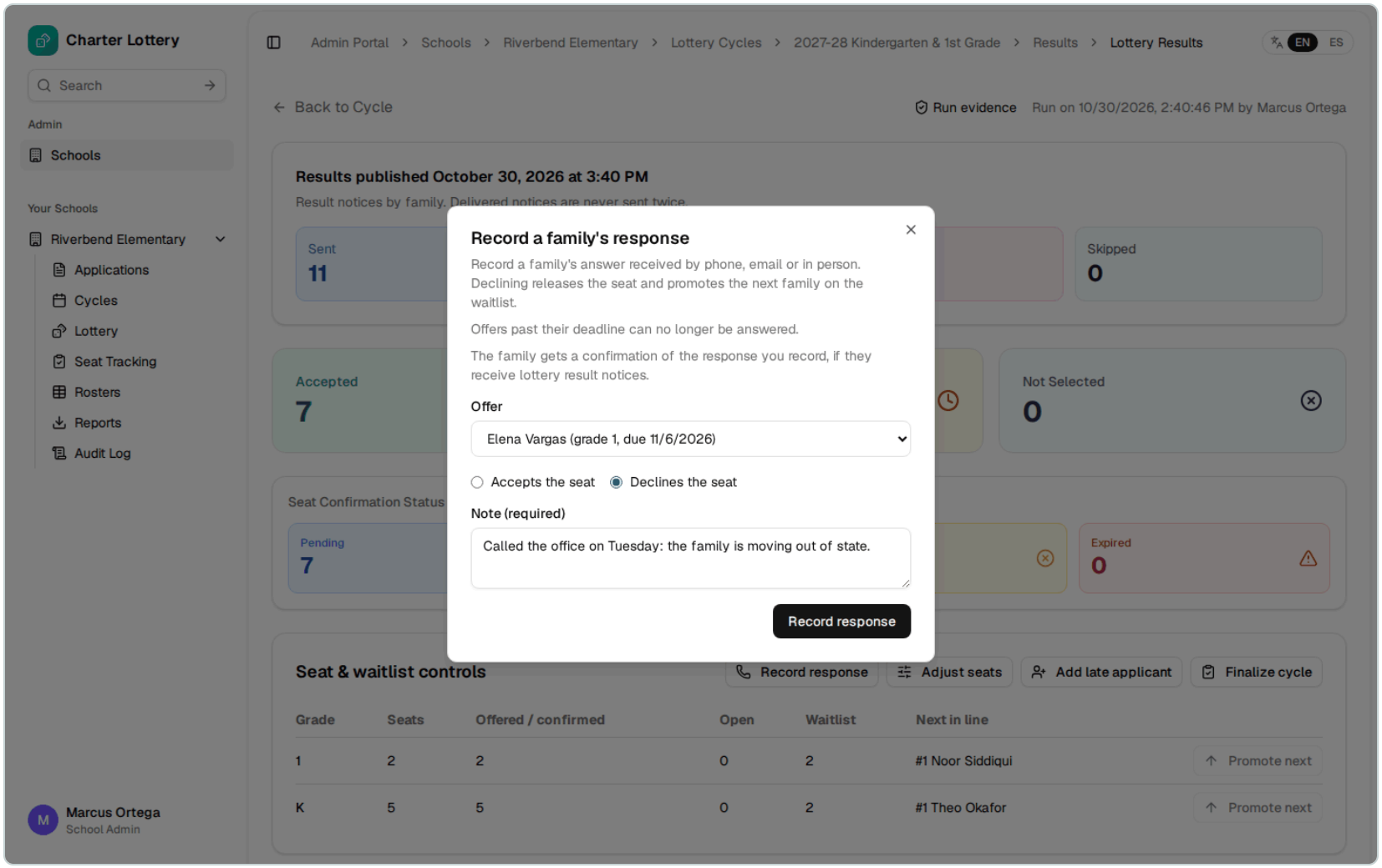
The results page has **Seat & waitlist controls**. **Promote next** is available only when a grade has an open seat and someone waiting. Declines, expired offers and added seats fill from the waitlist automatically.



Seats, open places and who is next.

Step 32. Record a phone or in-person answer

Select **Record response**, choose the family, and enter a note. A decline releases the seat and offers it to the next family.

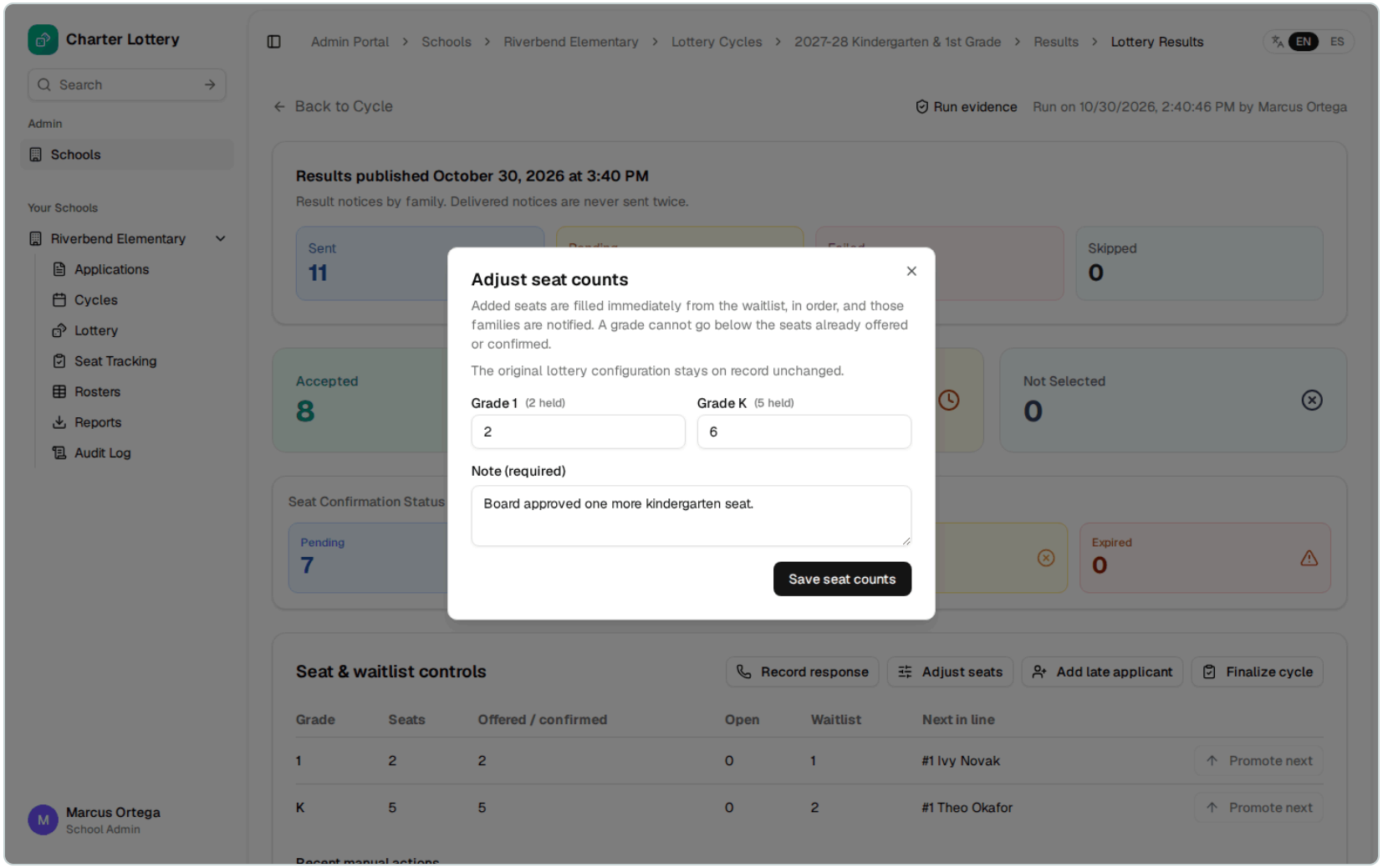


Recording a decline.

Step 33. Add seats

Select **Adjust seats**. New seats are offered straight away to waitlisted families, in order, and they are notified. The original lottery configuration

stays on record.

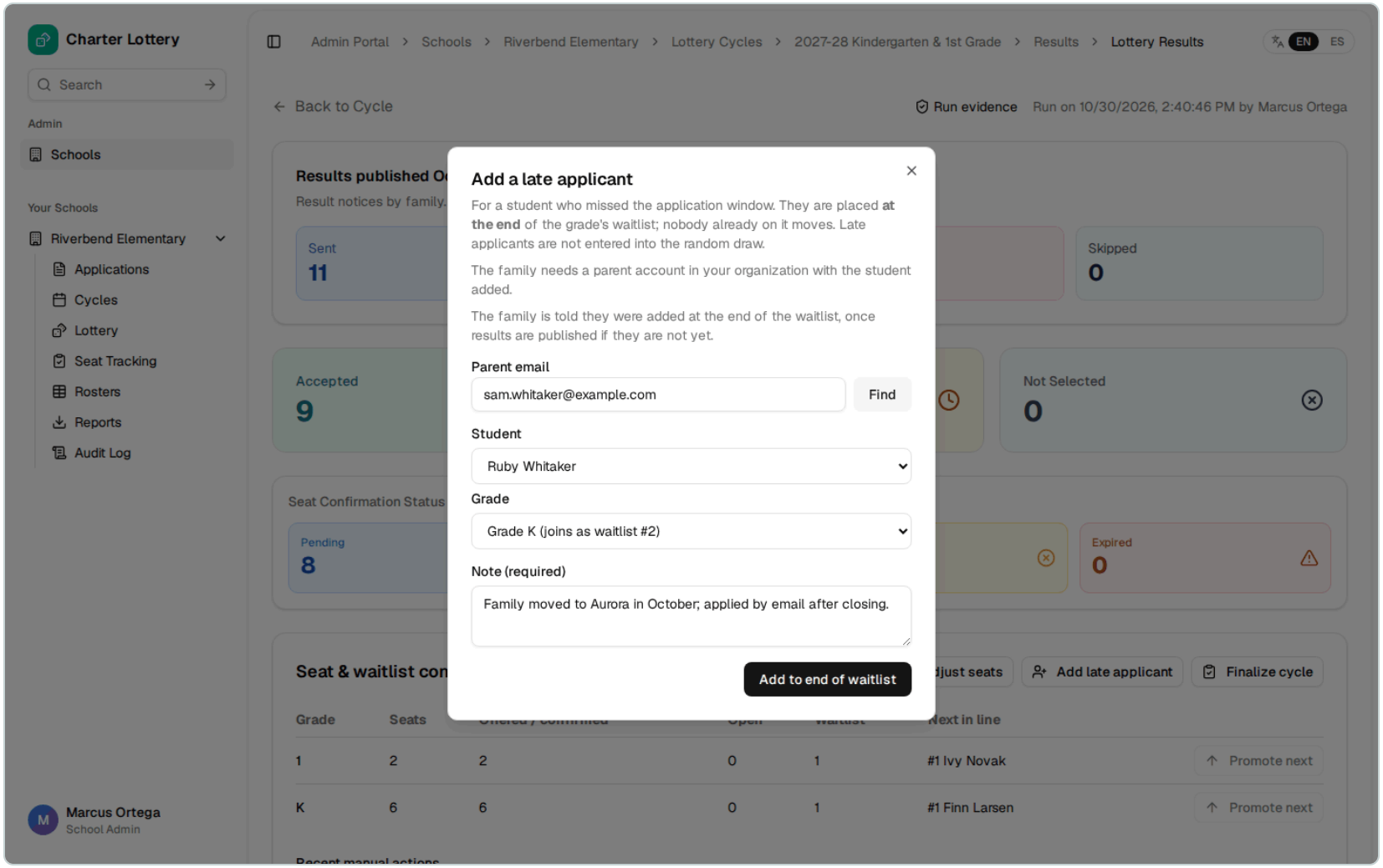


One more kindergarten seat.

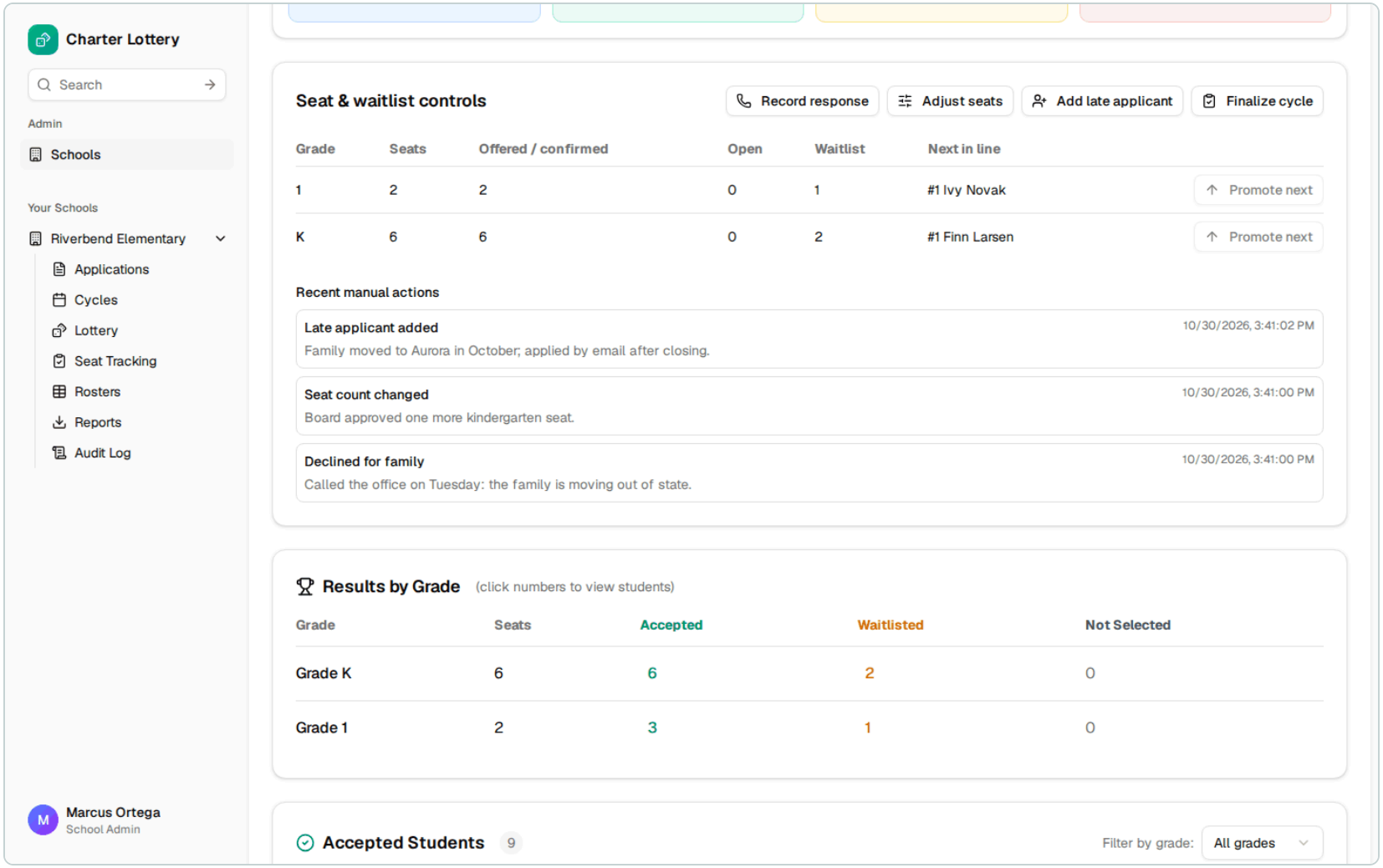
Step 34. Add a late applicant

Select **Add late applicant** and find the family by parent email. They need an account with the student added. Late applicants join the **end** of the

waitlist and nobody already on it moves.



A late applicant.



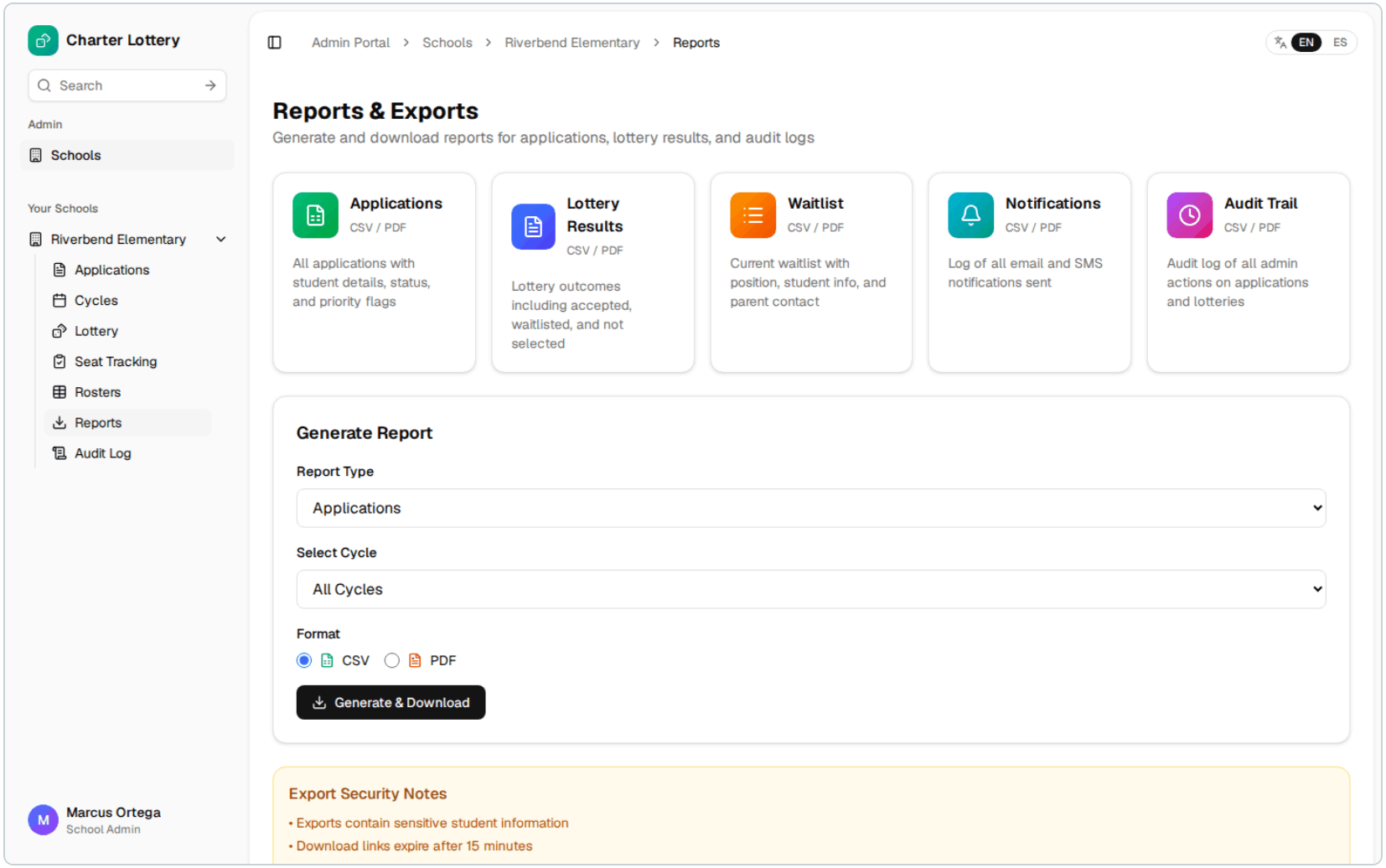
Each manual action is listed with its note.

PART 9

Close the season

Step 35. Export reports

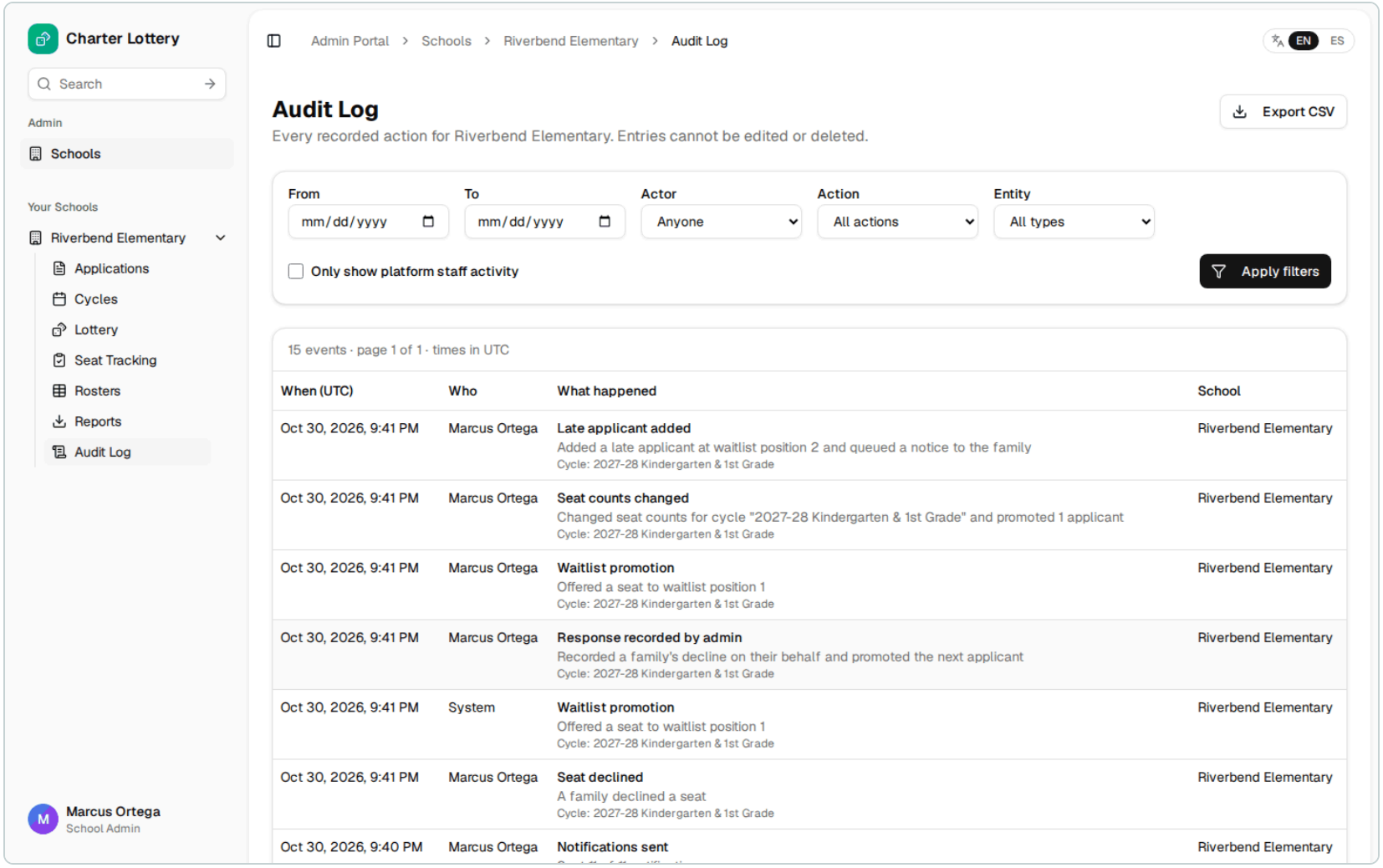
Reports produces applications, results, waitlist, notifications and audit trail files. Exports contain student information, and download links expire after 15 minutes.



Reports and exports.

Step 36. Check the audit log

Every recorded action is here, and entries cannot be edited or deleted.

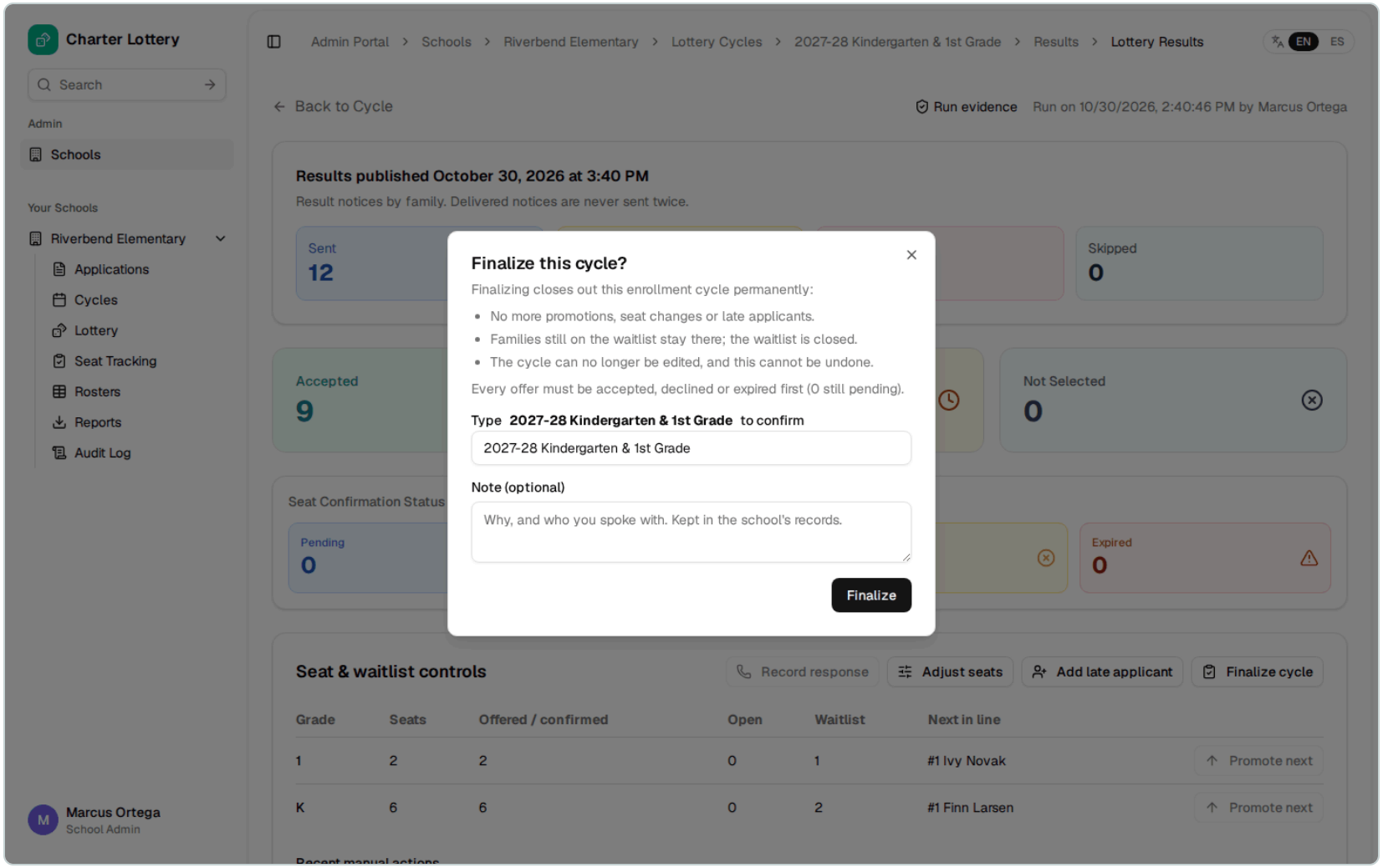


The school audit log.

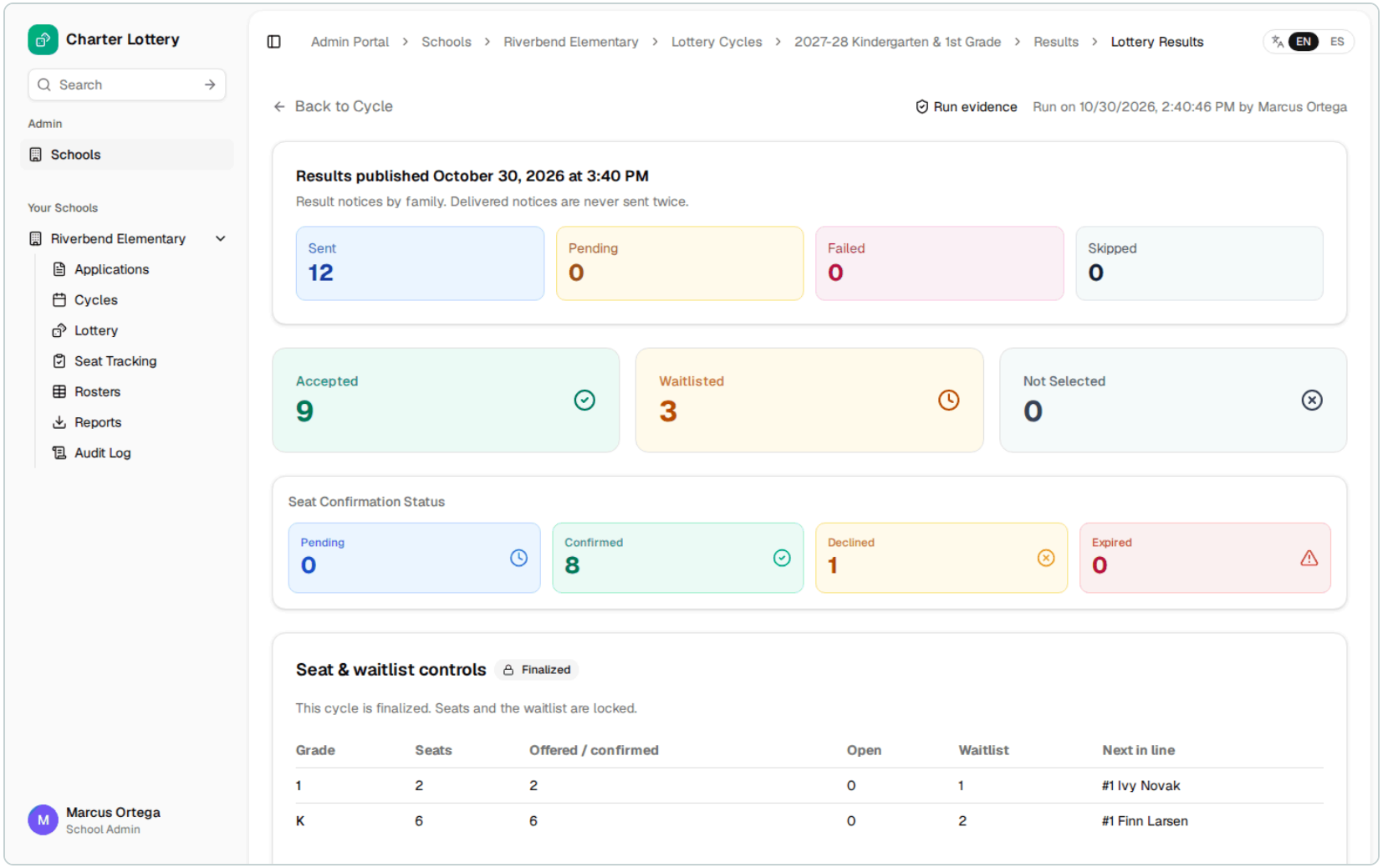
Step 37. Finalize the cycle

When every offer has been answered or has expired, select **Finalize cycle** and type the cycle's label to confirm. **This cannot be undone.** Seats

and the waitlist lock, and families still on the waitlist stay there.



The finalize confirmation.



A finalized cycle.

Who to ask

You need to	Ask
Add or remove a school from your account	Organization admin
Resend an expired invitation	Organization admin
Change email or SMS notices, the logo or colors	Organization admin
Change the waitlist promotion deadline	Organization admin
Create or change the parent portal	Organization admin
Invalidate a draw and run it again	Organization admin
Lost both your phone and your recovery codes	Charter Lottery support, after an identity check

Season checklist

- [ ] Two-step sign-in is set up and recovery codes are saved
- [ ] Required documents and the waitlist setting are right
- [ ] Seats, dates and priorities match your board-approved policy
- [ ] Every application is verified, ineligible or held for a reason
- [ ] Results were reviewed before publishing, and no notices failed
- [ ] The audit packet is saved
- [ ] Every offer is answered or expired before you finalize

Support

Help: support@charterlottery.com. Charter Lottery does not publish support hours or a response time.