

# Staff Procedures for Trial Enrollments

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To keep all of your staff on the same page, it's a good idea to develop a procedure for handling trial enrollments. This will ensure that your enrollment reports are consistent and accurate.

Establish a workflow to:

- Track incoming trial enrollments.

- Handle the enrollment for students who don't enroll in the class after the trial.

- Change the Enroll Type for students who liked their trial and then enrolled in the class.

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## Track Trial Enrollments

The ability to track and report on trial enrollments is based on the **Enroll Type**.

The Enroll Type of **Trial** is assigned to all trial enrollments, whether they come in **through Online Registration** or were **enrolled from within Jackrabbit**, which allows you to **report on trial enrollments** using reports that include the Search Criteria or Filter = Enroll Type.

The **Type (Enroll)** is displayed in both the *Class* record and the *Student* record.

The Scheduled Trials alert on the Executive Dashboard highlights the number of trial enrollments that are scheduled in a gray circle. Users with the right permissions can click the Scheduled Trials alert to open the Enroll History report search criteria page pre-filtered for Enrollment Type = Trial.

## Change Enroll Type Based on Trial Outcome

If a trial becomes an enrolled student, delete any *Future Drop* date from the class *Enroll List* tab and change the *Enroll Type* to **Trial-Enrolled**. This can also be done from the student's *Classes* tab.

If the student doesn't enroll after taking the trial class, staff should make sure a *Future Drop* is in place that will automatically drop the student. If not, the student should be dropped from the class using the date after the trial occurred.

*If no change is made, and the student remains as Enroll Type = Trial, it's possible that the student will be excluded from your tuition posting. This could happen if you always clear the checkbox for Post tuition to students with Enroll Type = Trial when using Post Tuition Fees.*

