

# 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.

## 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.

**Class Cheer Essentials**

← RETURN SAVE CHANGES DELETE

Class Roll Enroll Student Email/Text Class Enter Absences Absence/Attendance Class Drop Sizes/Measurements A

Summary Enroll List Drop List Absences Makeups Wait List Instructor Costumes Notes (0) Resources

	Student	Gender	Age	BirthDt	Medical	Absent	Enroll Date	Type	Future Drop	User ID	Balance	
1	<a href="#">Kai Fornos</a>	Non-Binary	11 yrs, 4 mths	7/11/2010		0	12/8/2021	Trial		Online	37.63	Drop Transfer
2	<a href="#">Coreen Harding</a>	Female	13 yrs, 9 mths	3/2/2008		0	11/1/2021	Trial-Enrolled		helpcenter	0.00	Drop Transfer
3	<a href="#">Jean Rose</a>	Female	11 yrs, 0 mths	11/17/2010		0	11/1/2021	Enrolled		helpcenter	0.00	Drop Transfer
4	<a href="#">Ayla Spencer</a>	Female	13 yrs, 8 mths	4/6/2008		0	12/8/2021	Trial	12/17/2021	helpcenter	0.00	Drop Transfer

**Trial-Enrolled** is used to indicate that a student's trial was successful and they decided to enroll in the class.

The **Future Drop** date is not automatically entered by Jackrabbit; it can be recorded by the User when it is known what date the student is taking the trial class.

**Student Ayla Spencer**

← RETURN SAVE CHANGES DELETE

Enroll Email Schedules Info Sheet Absence/Attendance Submit Absences Mass Drop Classes

Family: [Spencer](#) First Name  Middle Initial  Last Name

Summary **Classes** Events Medical Feedback Skills/Levels Sizes Absences Misc Notes (0) Resources (0)

**Current Enrollment**

View 1 - 1 of 1 Print Refresh

Class	Session	Type	Days	Room	Time	Dur	Instructors	Fee	Enroll Date	Enrolled By	Future Drop	
<a href="#">Cheer Essentials</a>	Winter 2022	Trial	Th	Floor B	6:30pm - 7:30pm	1:00	Stephanie.A.	75.00	12/8/2021	helpcenter	<a href="#">Transfer</a>	12/17/2021 <a href="#">Drop</a>

Any enrollment with the type of Trial triggers an Executive Dashboard Alert to bring the trial enrollments to your attention. Use the link to generate a report of upcoming trials.

# Executive Dashboard

REFRESH DASHBOARD

WEEKLY CALENDAR

Alerts Settings

0	<a href="#">Wait Lists for Classes with Openings</a>	0	<a href="#">Birthdays (Active) next 10 days</a>
0	<a href="#">Incomplete Time Entries</a>	1	<a href="#">Birthdays (Not Active) next 10 days</a>
0	<a href="#">2-3 Absences in last 14 days</a>	0	<a href="#">Items at or below Re-Order Alert Qty</a>
0	<a href="#">4+ Absences in last 30 days</a>	1	<a href="#">Classes with Incomplete Staff Portal Attendance (yesterday)</a>
11	<a href="#">Classes Past End Date To Archive</a>	1	<a href="#">Scheduled Emails</a>
2	<a href="#">Scheduled Trials (Enroll Type=Trial)</a>	0	<a href="#">Active Staff Certifications Due (30 days)</a>
		0	<a href="#">Active Staff Certifications Overdue</a>

## Enroll History Report

RETURN EMAIL

Enroll Date	Type	Class	Category1	Session	Student First	Student Last	Active	Drop Date	UserID	Email All
12/8/2021	Trial	<a href="#">Cheer Essentials</a>	Cheer	Winter 2022	<a href="#">Kai</a>	<a href="#">Fornos</a>	Yes		Online	<input type="checkbox"/>
12/8/2021	Trial	<a href="#">Cheer Essentials</a>	Cheer	Winter 2022	<a href="#">Avia</a>	<a href="#">Spencer</a>	Yes		helpcenter	<input type="checkbox"/>

## 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*.