Transfer a Student to Another Class

Last Modified on 08/30/2022 1:46 pm EDT

When a student leaves one class to attend another (especially within the same session),**Transfer** the student to another class. When you transfer a student, they are dropped from their current class and enrolled into the new class on the dates you assign. Both the primary instructor for the class the student is transferring into and the primary instructor the student is transferring from will receive email notification of the change.

Any scheduled future drops for the student are automatically added to the new class.

Transfer a Student

From the *Class* record, choose the **Enroll List** tab.

1. Locate the student who is transferring and click the**Transfer** link.

2. In the *Transfer Student* window, set the**Drop Date** (defaults to the current date). This is the date the student will be transferred out of the current class.
3. Select a **Drop Reason**. Optionally add **Notes**.
4. Locate the class the student is transferring into using the Class*Search* field.
5. Enter an **Enroll Date** (defaults to the current date). This is the date the student will be enrolled in the new class.
    - If you are aware the student will be dropping the new class on a specified date enter the **Drop Date** and select a**Drop Reason**. Optionally add **Notes**.
6. If the family has been charged and paid for the class the student is transferring out of, and you want the fee and payment transactions to be associated with the new class instead, select the checkbox for **Yes, update existing transactions with information from the new class** Choose to **only update transactions on or after** a selected date (defaults to the current date) or to**update all existing transactions**.
7. If you would like the instructor to be informed of the transfer, select the checkbox for**Yes, email the instructor about this transfer**.
8. Select the **Transfer Student** button to complete the transfer.

Transfer Student

ℹ This family has a balance: 120.00

Student	Miki Barker
Current Classes	Ballet 3, Ballet 2 - Friday, Bubble Blowers, Advanced Tumbling - Thursday, Jazz 2 - Monday
Family/Acct	Barker Phone

Transfer from

Class Advanced Tumbling - Thursday — *From class is pre-filled.*

Enrolled 12/13/2018

Drop Date* 5/1/2019 📅

Drop Reason Transfer ▼

Notes Changing to Wednesdays

Transfer to

Class Advanced Tumbling - Wednesday 🔍 Clear — *Click to search for a new class.*

Enroll Date* 5/1/2019 📅

Drop Date mm/dd/yyyy 📅

Drop Reason ▼

Notes

Transfer Options

Would you like to update existing Advanced Tumbling - Thursday transactions?

The Class Name, Session and Category 1 will be replaced with the values from Advanced Tumbling - Wednesday.

☑ Yes, update existing transactions with information from the new class.

    ◉ Only update transactions on or after this date 5/1/2019 📅

    ○ Update all existing transactions

Should we send an email to the instructors about this transfer?

☑ Yes, email the instructors about this transfer

✔ Transfer Student Cancel

9. The *Transfer Successful* window summarizes the transfer details, including how many transactions were updated.

Transfer Successful

Transfer Details

Miki has transferred from **Advanced Tumbling - Thursday** to **Advanced Tumbling - Wednesday**

Drop Date: 05/01/2019
Enroll Date: 05/01/2019

2 Transactions updated

Ok

QUICK tip!

You can also transfer a student to another class from the *Student* **Summary** or **Class** tab using the same process above!

Edit a Transfer

Transfers can only be edited before the student is transferred out of the class, i.e., the drop date is greater than the current date.

From the *Class* record, choose the **Enroll List** tab.

1. Locate the student who is transferring and click the **Edit Transfer** link.

2. Update the transfer details as needed in the *Edit Transfer Student* window.
3. Click the **Transfer Student** button to complete the transfer.
4. The *Transfer Successful* window summarizes the transfer details, including how many transactions were updated.

You can also edit a transfer of a student to another class from the *Student* **Summary** or **Class** tab using the same process above!