

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.

Class: Advanced Tumbling - Thursday

← RETURN **SAVE CHANGES** **DELETE**

Class Roll Enroll Student Email/Text Class Enter Absences Absence/Attendance Post Class Transactions Copy Class Mass Drop Sizes/Measurements Archive Class

Summary **Enroll List** Drop List Absences Makeups Wait List Instructors Lesson Plan Skills/Levels Misc Costumes

Current Enrollment

View 1 - 3 of 3 Print Export Refresh

	Student	Gender	Age	BirthDt	Levels	Medical	Absent	Enroll Date	Type	Future Drop	User ID	Balance	Drop	Transfer
1	Dave Aeger	Male	8 yrs	9/16/2010		Meds Allergies	0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Transfer
2	Dianne Aeger	Female	12 yrs	11/11/2006			0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Transfer
3	Miki Barker	Female	12 yrs	10/18/2006			0	12/13/2018	Enrolled		jctami	120.00	Drop	Transfer

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 *ClassSearch* field.
5. Enter an **Enroll Date** (defaults to the current date). This is the date the student will be enrolled in the new class.
 - o 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

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 Click to search for a new class. Clear

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

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



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.

Class: Advanced Tumbling - Thursday

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Summary **Enroll List** Drop List Absences Makeups Wait List Instructors Lesson Plan Skills/Levels Misc Costumes

Current Enrollment

View 1 - 2 of 2 Print Export Refresh

	Student	Gender	Age	BirthDt	Levels	Medica Allergies	Absent	Enroll Date	Type	Future Drop	User ID	Balance	Drop	Edit Transfer
1	Dave Ager	Male	8 yrs	9/16/2010			0	3/25/2019	Enrolled	6/5/2019	jtcamber	195.00	Drop	Edit Transfer
2	Dianne Ager	Female	12 yrs	11/11/2006			0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Edit Transfer

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!