Staff Procedures for Trial Enrollments

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.
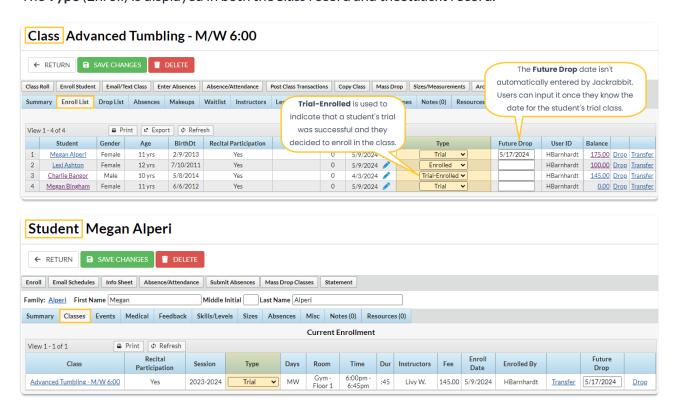
Establish a workflow to:

✔ 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

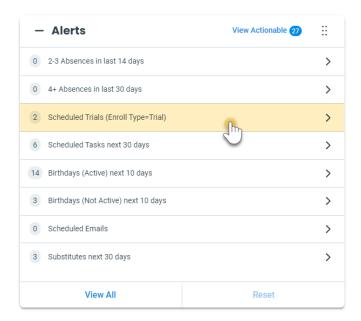The ability to track and report on trial enrollments is based on the **Enroll Type**.

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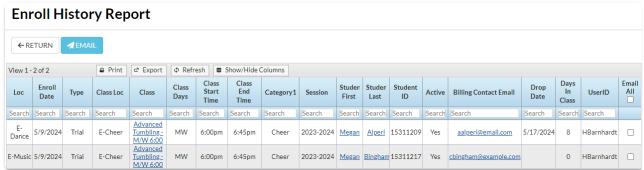
The **Type** (Enroll) is displayed in both the *Class* record and the *Student* record.

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.

	Alerts	View Actionable **27**	
0	2-3 Absences in last 14 days		>
0	4+ Absences in last 30 days		>
2	Scheduled Trials (Enroll Type=Trial)		>
6	Scheduled Tasks next 30 days		>
14	Birthdays (Active) next 10 days		>
3	Birthdays (Not Active) next 10 days		>
0	Scheduled Emails		>
3	Substitutes next 30 days		>

View All	Reset

Enroll History Report

← RETURN ✈ EMAIL

View 1 - 2 of 2   🖨 Print   ⬈ Export   ⟳ Refresh   ▥ Show/Hide Columns

Loc	Enroll Date	Type	Class Loc	Class	Class Days	Class Start Time	Class End Time	Category1	Session	Studen First	Studen Last	Student ID	Active	Billing Contact Email	Drop Date	Days In Class	UserID	Email All ☐
Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	
E-Dance	5/9/2024	Trial	E-Cheer	Advanced Tumbling - M/W 6:00	MW	6:00pm	6:45pm	Cheer	2023-2024	Megan	Alperi	15311209	Yes	aalperi@email.com	5/17/2024	8	HBarnhardt	☐
E-Music	5/9/2024	Trial	E-Cheer	Advanced Tumbling - M/W 6:00	MW	6:00pm	6:45pm	Cheer	2023-2024	Megan	Bingham	15311217	Yes	cbingham@example.com		0	HBarnhardt	☐

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.*