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:

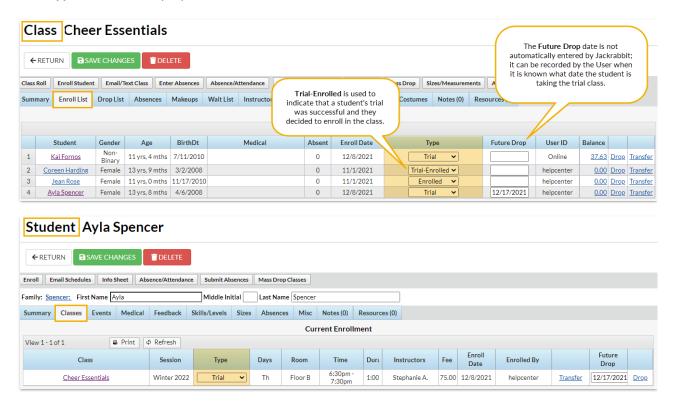
- Track incoming trial enrollments.
- ✓ Handle the enrollment for students who don't enroll in the class after the trial.
- Change the Enroll Type for students who liked their trial and then enrolled in the class.

Track Trial Enrollments

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

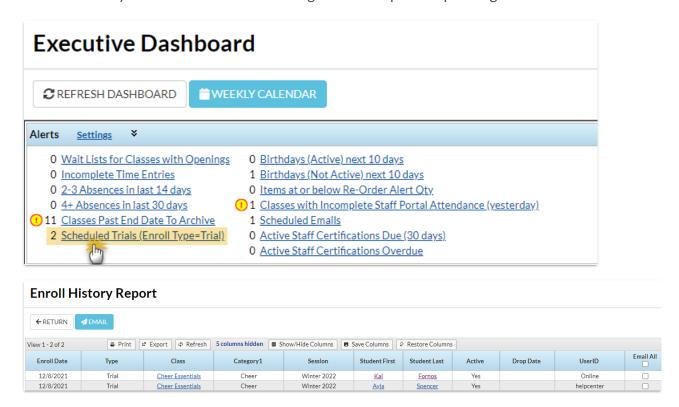
The Enroll Type of **Trial** is assigned to all trial enrollments, whether they come in**through Online Registration** or were **enrolled from within Jackrabbit**, which allows you to **report on trial enrollments**using reports that include the Search Criteria or Filter = Enroll Type.

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



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.



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.
- X If the student doesn't enroll after taking the trial class, staff should make sure aFuture 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.