

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.

Class Advanced Tumbling - M/W 6:00

← RETURN SAVE CHANGES DELETE

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

Summary Enroll List Drop List Absences Makeups Waitlist Instructors Le

View 1 - 4 of 4 Print Export Refresh

Student	Gender	Age	BirthDt	Recital Participation	Type	Future Drop	User ID	Balance		
1 Megan Alperi	Female	11 yrs	2/9/2013	Yes	Trial	5/17/2024	HBarnhardt	175.00	Drop	Transfer
2 Lexi Ashton	Female	12 yrs	7/10/2011	Yes	Enrolled		HBarnhardt	100.00	Drop	Transfer
3 Charlie Bangor	Male	10 yrs	5/8/2014	Yes	Trial-Enrolled		HBarnhardt	145.00	Drop	Transfer
4 Megan Blinham	Female	11 yrs	6/6/2012	Yes	Trial		HBarnhardt	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 isn't automatically entered by Jackrabbit. Users can input it once they know the date for the student's trial class.

Student Megan Alperi

← RETURN SAVE CHANGES DELETE

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

Family: Alperi First Name Megan Middle Initial Last Name Alperi

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

Current Enrollment

View 1 - 1 of 1 Print Refresh

Class	Recital Participation	Session	Type	Days	Room	Time	Dur	Instructors	Fee	Enroll Date	Enrolled By	Future Drop	
Advanced Tumbling - M/W 6:00	Yes	2023-2024	Trial	MW	Gym - Floor 1	6:00pm - 6:45pm	:45	Livy W.	145.00	5/9/2024	HBarnhardt	5/17/2024	Drop

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

Loc	Enroll Date	Type	Class Loc	Class	Class Days	Class Start Time	Class End Time	Category1	Session	Studer First	Studer Last	Student ID	Active	Billing Contact Email	Drop Date	Days In Class	UserID	Email All <input type="checkbox"/>	
Search	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	<input type="checkbox"/>	
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	<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.