



Registration & Enrollment Checklist

HERE ARE RECOMMENDATIONS FOR OPENING REGISTRATION, ENSURING STUDENT ENROLLMENTS ARE CORRECT, FEES AND PAYMENTS ARE PROCESSED ACCURATELY, AND COMMUNICATING WITH FAMILIES ALONG THE WAY.

- Review your class schedule. [Add classes](#) as needed or [transition current classes](#).
- Use [Edit All Classes](#) to set:
 - Display on Website = Yes, to include classes in your Class Listings Tables
 - Set Allow Online Registration = No until registration opens
 - Set Allow Portal Enrollment = No until registration opens
- Add [Class Listings Tables](#) to your website.
- Communicate the date registration opens. See [Email your families](#).
- Open your classes for Online Registration and Parent Portal enrollment. Use [Edit All Classes](#) to set:
 - Allow Portal Enrollment = Yes. See [Offer Priority Enrollment with the Parent Portal](#)
 - Allow Online Registration = Yes, to add the Register link in Class Listings Tables
 - With the above settings set to Yes and Display on Website to Yes (set in a previous step), registration will open:
 - Immediately when there is no date in the Registration Start Date field.
 - At midnight (database time zone) on the Registration Start Date, when there is a future date in the Registration Start Date field.
 - Immediately when there is a past date or today's date in the Registration Start Date field. This method is great for opening registration at a specific time other than midnight on the Registration Start Date.
- Review registrations and class enrollments. See [Process Class Registrations Report](#).
 - Check students are in the proper class for their age, skill level, etc. See [Transfer a Student to Another Class](#).
 - [Email Waitlisted Students](#).
 - Send additional new family communication (studio uniform, costumes, supplies, etc.)
- Email [All Families](#) who have not agreed to all current policies. Use the Policy Status Data Visual to select families and the Send Message Icon.
- Post fees to families. See Step 1 in [Tuition Billing in 4 Steps](#).
- Process payments. See Step 4 in [Tuition Billing in 4 Steps](#).
- Email student schedules. See [Email Multiple Student Schedules](#).