Transition to a New Class Session Checklist

TOWARD THE END OF ONE SESSION AND BEFORE A NEW SESSION BEGINS, THERE MAY BE A TIME WHEN BOTH SESSIONS ARE ACTIVE IN YOUR JACKRABBIT DATABASE (BECAUSE THE OLD SESSION IS STILL IN PROGRESS, BUT ENROLLMENT HAS BEGUN FOR THE NEW SESSION).

Follow these steps to maintain two sessions simultaneously and ultimately archive the old session.

- [ ] Create the new Class Session Drop-down List value.
- [ ] Use Classes > Copy Classes to copy classes from one Session to another.
- [ ] Edit classes copied to the new Session using Classes > Edit All Classes to update Tuition Fee, Instructor, etc.
- [ ] Once you have posted all fees, archive the Classes in the old Session using Classes > Archive Classes.
- [ ] Hide the previous Session value to prevent it from appearing in the filter drop-down list when customers filter for classes via your website or Parent Portal (does not hide classes).
- [ ] Review your Calendar to view your new class schedule and make changes to maximize class and staff efficiency. Is it time to add a class?
- [ ] Move families to the Lead File. We recommend moving families inactive for at least 18 months.
- [ ] Review our Registration & Enrollment Topic Hub for your next steps.
- [ ] Additional Optional Tasks:
  - [ ] Update your Fee Schedule for By Total Hours Billing.
  - [ ] Update Student Grade Levels.
  - [ ] Clear User-defined Fields as needed.
  - [ ] Update or remove Family Fixed Fees / Student Fixed Fees.
  - [ ] Place inactive students in active families on hold using Hold Student.
  - [ ] Clear Student Sizes and Costumes by contacting Support. (?)
  - [ ] Clear Absences by contacting Support. (?) Run an Absences-Makeup Report to save/print for the date range you wish to clear.