

Re-enrolment Checklist

Please ensure that you log out of the system and then log back in before starting the Re-enrolment process. If you do not log out, the system can store information, such as excluding dates, from the previous re-enrolment and apply these in your new term causing discrepancies in lesson dates and invoices.

1. Move and Stay (If students are not staying in the same groups)

Instructors should mark who will be staying in the same class type and which students will be moving up or down.

2. Credits

Check credits, press **Re-enrolment** and then **Unused Credits**.

3. Check courses will roll

Check that courses will be rolled over to your new term by pressing **Re-enrolment** and **Course Repeating Status**, ensure each course you want to be rolled over has a repeating status set to **'Yes'**.

4. Create Courses

Create your new terms courses by pressing **Re-enrolment** followed by **Perform Course Creation**. This process is split into four sections.

- Section 1 – Course Health Check
- Section 2 – Term Creation
- Section 3 – Defining Days
- Section 4 – Set Pricing

5. Review Courses (If students are not all staying in the same groups)

Review your course requirements by pressing **Re-enrolment** and **Courses Required Next Term**.

6. Mark all Students Staying

Only do this if all students are staying in the same course. To complete the task, press **Re-enrolment** and **Mark all Students Staying**.

7. Place Students

Part 1 – Enrol Stayers

Press **Re-enrolment** and **Re-enrol Students**, use the button at the bottom of the page marked **Enrol stayers**.

- Part 2 – Place any movers
- Part 3 – Handle 'request to changes'

8. Review Client Orders

Go to the new term, then **Course Documentation** and create the Wall Listing to review the client fees. Also, check your client's orders in the **Financials** and **Clients Order V3** to ensure all students have an order created.

9. Check Communications

Check client documentation by going to the new term and pressing **Client Communication** and then **Review Communication**.

10. Confirm Re-enrolment was successful

To check re-enrolment was completed successfully, go to **Students** from the Main Menu, and then press **Students without a place**. If re-enrolment was successful, this page will be blank.