

Transfer a Student to Another Class

Last Modified on 08/30/2022 1:53 pm EDT

When a student leaves one class to attend another (especially within the same session), **Transfer** the student to another class. When you transfer a student, they are dropped from their current class and enrolled into the new class on the dates you assign.

Transfer a Student

From the *Class* record, choose the **Enroll List** tab.

1. Locate the student who is transferring and click the **Transfer** link.

Class: Advanced Tumbling - Thursday

← RETURN **SAVE CHANGES** **DELETE**

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

Summary **Enroll List** Drop List Absences Makeups Wait List Instructors Lesson Plan Skills/Levels Misc Costumes

Current Enrollment

View 1 - 3 of 3 Print Export Refresh

	Student	Gender	Age	BirthDt	Levels	Medical	Absent	Enroll Date	Type	Future Drop	User ID	Balance		
1	Dave Ager	Male	8 yrs	9/16/2010		Meds Allergies	0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Transfer
2	Dianne Ager	Female	12 yrs	11/11/2006			0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Transfer
3	Miki Barker	Female	12 yrs	10/18/2006			0	12/13/2018	Enrolled		jtctami	120.00	Drop	Transfer

2. In the *Transfer Student* window, set the **Drop Date** (defaults to current date). This is the date the student will be transferred out of the current class.
 3. Select a **Drop Reason**. Optionally add **Notes**.
 4. Locate the class the student is transferring into using the *ClassSearch* field.
 5. Enter an **Enroll Date** (defaults to current date). This is the date the student will be enrolled into the new class.
 6. If you are aware the student will be dropping the new class on a specified date enter the **Drop Date** and select a **Drop Reason**. Optionally add **Notes**.
 7. If the family has been charged and paid for the class the student is transferring out of and the fee/payment should be transferred to the class the student is transferring into, select the checkbox for **Yes, update existing transactions with information from the new class** Choose to **only update transactions on or after** a selected date (defaults to current date) or to **update all existing transactions**.
 8. If you would like the instructor to be informed of the transfer, select the checkbox for **Yes, email the instructor about this transfer**.
 9. Click the **Transfer Student** button to complete the transfer.
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Transfer Student

This family has a balance: 120.00

Student: Miki Barker
 Current Classes: Ballet 3, Ballet 2 - Friday, Bubble Blowers, Advanced Tumbling - Thursday, Jazz 2 - Monday
 Family/Acct: Barker Phone

Transfer from
 Class: Advanced Tumbling - Thursday
 Enrolled: 12/13/2018
 Drop Date: 5/1/2019
 Drop Reason: Transfer
 Notes: Changing to Wednesdays

Transfer to
 Class: Advanced Tumbling - Wednesday
 Enroll Date: 5/1/2019
 Drop Date: mm/dd/yyyy
 Drop Reason:
 Notes:

Transfer Options
 Would you like to update existing Advanced Tumbling - Thursday transactions?
 The Class Name, Session and Category 1 will be replaced with the values from Advanced Tumbling - Wednesday.

- Yes, update existing transactions with information from the new class.
- Only update transactions on or after this date: 5/1/2019
- Update all existing transactions

Should we send an email to the instructors about this transfer?
 Yes, email the instructors about this transfer

From class is pre-filled.

Click to search for new class.

10. The *Transfer Successful* window summarizes the transfer details, including how many transactions were updated.

Transfer Successful

Transfer Details

Miki has transferred from **Advanced Tumbling - Thursday** to **Advanced Tumbling - Wednesday**

Drop Date: 05/01/2019
 Enroll Date: 05/01/2019

2 Transactions updated

You can also transfer a student to another class from the *Student Summary* or *Class* tab using the same process above!



The option 'Transfer Charges/Payments' that displays in the Transfer Student popup only applies to transactions that are associated with the class. With Student Based Billing, tuition fees will not have a class associated with them unless you have edited the transaction after it is posted.

Edit a Transfer

Transfers can only be edited before the student is transferred out of the class, i.e., the drop date is greater than the current date.

From the *Class* record, choose the **Enroll List** tab.

1. Locate the student who is transferring and click the **Edit Transfer** link.

Class: Advanced Tumbling - Thursday

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Current Enrollment

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	Student	Gender	Age	BirthDt	Levels	Medica	Absent	Enroll Date	Type	Future Drop	User ID	Balance		
1	Dave Ager	Male	8 yrs	9/16/2010		Meds Allergies	0	3/25/2019	Enrolled	6/5/2019	jtcamber	195.00	Drop	Edit Transfer
2	Dianne Ager	Female	12 yrs	11/11/2006			0	3/25/2019	Enrolled		jtcamber	195.00	Drop	Transfer

2. Update the transfer details as needed in the *Edit Transfer Student* window.
3. Click the **Transfer Student** button to complete the transfer.
4. The *Transfer Successful* window summarizes the transfer details, including how many transactions were updated.

You can also edit a transfer of a student to another class from the Student Summary or Class tab using the same process above!



The option 'Transfer Charges/Payments' that displays in the Transfer Student popup only applies to transactions that are associated with the class. With Student Based Billing, tuition fees will not have a class associated with them unless you have edited the transaction after it is posted.