

Transitioning Sessions - The Best Time to Spring Clean your Database

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With a system like Jackrabbit, [Transitioning to a New Session of Classes](#) is a quick and easy task. Naturally, this is the best time to tidy up and get ready for your enrollment period. These recommendations can help you check some items off your list!

Review Tuition Rates (Student Based Billing only)

With your current session of classes ending, you should take a look at [Tuition Rates](#). For the students that will not keep the same rate for the next session, edit the tuition rate to add a *Through* date. Make sure the *Through* date is after your last billing date. You can [assign a tuition rate](#) for the new session after the student enrolls.

For the students that will keep the same rate for the next session, make sure the *Through* date entered is not before the end of the new session. Having an early *Through* date could eliminate the student from batch billing prematurely.

Clear Fixed Fees (Class Based Billing only)

Fixed fees are usually specific to a particular session and or enrollment. Once you have posted the final tuition fees for the session, it is a great idea to mass clear fixed fees in preparation for your new session. Check out our Help article [Fixed Fees with Class Based Billing](#) for more information.

Online Registration and Parent Portal Settings

Before you open your enrollment period, double check your registration form and Parent Portal to make sure everything is in line.

Start with your Web Registration Form. Are any changes needed for your automatic registration fee posting, user-defined fields, etc.? See our Help section for how to [Customize Your Web Registration Form](#) for more details on making adjustments to your form.

Next, check out your Parent Portal settings. The most important setting being your Policy Agreement

Date. Updating this date will ensure that your active families have an up-to-date agreement on file.

The Importance of Updated Policies and Agreements Best Practice article highlights everything you want to know regarding why current agreements are important for your center.

Update Student Grade Level

Jackrabbit will not automatically update a student's grade level from year to year, however, you can do a **mass update** if you are not using **custom grade levels**.

If you use custom grade levels, teachers can gather this information in the first few weeks of a new session by making notes on printed class rolls. Teachers can pass the information to your office staff to have the grades updated in Jackrabbit.

Clear User-defined Fields

User-defined fields used to collect session-specific information (i.e. photo release, assistance needed, etc.), can be mass cleared in order to collect updated information for your new session. Check out our Help article **User-defined Fields** for more information.



In your Parent Portal settings, set the User-defined fields to *Can Update - Required* so existing families will enter new information the next time they log in.

Group PIN Pickup Lists

Group PINs are a great way to mass check in or check out students. If your Group PINs are session-specific, remove all pickups from the Group PIN after the 'old' session is over. Create a new one for your upcoming session to ensure you have all the students you need.

Move Families to the Lead File

We recommend archiving (lead filing) families that have been inactive for 12-18 months. This will keep you from prematurely lead filing families that may be taking a break from your program. Lead filing keeps your database up-to-date with active students and can also help you save money. Since Jackrabbit's monthly subscription is based on total students (Inactive and Active), sending inactive families to the Lead File to help lower that number.



If you know a family is not returning, make sure you send a **year end tax statement** prior to archiving the family. This will keep you from having to restore the family later to send a tax statement then rearchive.

The **Lead File** does not keep all family information so it is best to avoid sending families there too soon simply because they are not enrolled in an active class. Jackrabbit gives you the option to **mass archive families** or **individually archive families** to the lead file.




A student's past enrollment data is retained in the Lead File and will restore to the Family record, however, historical enrollment reporting does NOT include Lead File families. While the family is in the Lead File their enrollment history will NOT be included in any enrollment reports run in your main database. It is a best practice to run any enrollment reports you need before archiving families.

New Session Checklist

Sessional procedures are important. If your session follows a calendar year or a school year, it can be tricky to remember all the details that come with transitioning to a new session of classes and prepping for enrollment. Use these suggestions to create your new session to-do list and start building your new session when you are ready.

Check out our sample checklist below!

New Session Checklist 

- Review Tuition Rates (Student Based Billing only)
- Clear Fixed Fees (Class Based Billing only)
- Online Registration and Parent Portal settings
- Update Student Grade Levels
- Clear User-defined Fields
- Group PIN Pickup Lists
- Move families to the Lead File
- Transition to a new session of Classes
- Archive Classes