

# Transfer a Student to Another Class

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Watch a (2:25) video tutorial on how to Transfer a Student to Another Class

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	<a href="#">Dave Ager</a>	Male	8 yrs	9/16/2010		Meds Allergies	0	3/25/2019	Enrolled		jtcamber	195.00	<a href="#">Drop</a>	<a href="#">Transfer</a>
2	<a href="#">Dianne Ager</a>	Female	12 yrs	11/11/2006			0	3/25/2019	Enrolled		jtcamber	195.00	<a href="#">Drop</a>	<a href="#">Transfer</a>
3	<a href="#">Miki Barker</a>	Female	12 yrs	10/18/2006			0	12/13/2018	Enrolled		jctami	120.00	<a href="#">Drop</a>	<a href="#">Transfer</a>

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 you

want the fee and payment transactions to be associated with the new class instead, 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 check box for **Yes, email the instructor about this transfer**.
9. Select the **Transfer Student** button to complete the transfer.

The screenshot shows the 'Transfer Student' form. At the top, a blue header bar contains the title 'Transfer Student'. Below this, a light blue box displays a message: 'This family has a balance: 120.00'. The form is divided into several sections. The 'Student' section shows 'Miki Barker'. The 'Current Classes' section lists 'Ballet 3, Ballet 2 - Friday, Bubble Blowers, Advanced Tumbling - Thursday, Jazz 2 - Monday'. The 'Family/Acct' section shows 'Barker' and 'Phone'. The 'Transfer from' section includes 'Class: Advanced Tumbling - Thursday', 'Enrolled: 12/13/2018', 'Drop Date: 5/1/2019' (with a calendar icon), 'Drop Reason: Transfer', and 'Notes: Changing to Wednesdays'. A yellow callout bubble points to the 'Drop Date' field with the text 'From class is pre-filled.' The 'Transfer to' section includes 'Class: Advanced Tumbling - Wednesday' (with a search icon and a 'Clear' button), 'Enroll Date: 5/1/2019' (with a calendar icon), 'Drop Date: mm/dd/yyyy' (with a calendar icon), 'Drop Reason: [dropdown]', and 'Notes: [text area]'. A yellow callout bubble points to the search icon with the text 'Click to search for new class.' The 'Transfer Options' section asks 'Would you like to update existing Advanced Tumbling - Thursday transactions?' and 'The Class Name, Session and Category 1 will be replaced with the values from Advanced Tumbling - Wednesday.' It has three radio button options: 'Yes, update existing transactions with information from the new class.' (selected), 'Only update transactions on or after this date: 5/1/2019' (with a calendar icon), and 'Update all existing transactions'. Below this, it asks 'Should we send an email to the instructors about this transfer?' with a checked checkbox 'Yes, email the instructors about this transfer'. At the bottom, there are two buttons: 'Transfer Student' (with a blue checkmark icon) and 'Cancel'. A mouse cursor is clicking on the 'Transfer Student' button.

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

The screenshot shows the 'Transfer Successful' window. It has a blue header bar with the title 'Transfer Successful'. Below this, the section 'Transfer Details' is displayed. The text reads: 'Miki has transferred from Advanced Tumbling - Thursday to Advanced Tumbling - Wednesday'. Below this, it shows 'Drop Date: 05/01/2019' and 'Enroll Date: 05/01/2019'. A yellow box highlights the text '2 Transactions updated'. At the bottom, there is a single button labeled 'Ok'.



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

## 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**

← 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	<b>Enroll List</b>	Drop List	Absences	Makeups	Wait List	Instructors	Lesson Plan	Skills/Levels	Misc	Costumes

**Current Enrollment**

View 1 - 2 of 2   Print   Export   Refresh

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

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!