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!

Clear Absences

If your database is set to**track absences**, you may offer makeups for your students. Some organizations require that makeup classes be scheduled during the same session as the absence. In this case, once a session is over you can contact Support to have absences, prior to a given date, cleared from your database. This will help you and parents (via the Parent Portal) view only absences related to your upcoming/current session.

Before you have your absences cleared by Support, it is beneficial to run an**Absences-Makeup Report** to save for the time period being cleared. This will allow you to refer back to 'old' absences if needed without keeping the data in your database.

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.

Student Sizes and Costumes

You may want to clear out your student sizes and old costumes. Children can grow quickly so it is best to start fresh and collect new measurements for all students. Contact Support to have these sizes and costumes cleared all at once!

Clear User-defined Fields

If you are using User-defined fields to collect session-specific information (i.e. recital participation), you will want to mass clear these fields so you can collect the information for your new session. Check out our Help article **User-defined Fields** for more information.

Clear Fixed Fees

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 **Student & Family Fixed Fees** for more information.

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 can help lower that number.

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.

Archive Classes

A designated **dashboard alert** lets you know when you have classes that have ended. If you have posted all fees for these classes, you can "move them out of the way" by archiving them. Jackrabbit gives you the flexibility to **archive many classes** (e.g. 2018-19 Session) at one time. Or you can **archive classes individually** as the class ends. It is best to pick one method and stick to it!

Archived classes will move to the student's past enrollment rather than showing in the student's current enrollment. Since parents can view current enrollment in the Parent Portal, archiving classes that have ended will help eliminate confusion for them. No need to worry - you can access all archived classes and restore them if needed. You can also **email archived classes** easily!

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 ✔

- [ ] Clear Absences
- [ ] Update Student Grade Levels
- [ ] Clear Student Sizes and Costumes
- [ ] Clear User-defined Fields
- [ ] Clear Fixed Fees
- [ ] Move families to the Lead File
- [ ] Transition to a new session of Classes
- [ ] Archive Classes