



Release Notes

Improved Enrollment Transfer Workflow

General Overview

The purpose of this task is to allow Staff to send an email acknowledging transferred enrollments from within the Office Portal. Currently, confirmation emails of this nature are only sent when a Transfer request is approved via Online Activity.

To address this, we are adding a new email template to be used for Class Transfers made via the Office Portal, and a setting that will allow staff to choose whether to send that email during the transfer process.

How will this benefit me?

This change will improve the transfer workflow when the enrollment transfer process is initiated by Staff in the Office Portal.

Where will I see these changes?

These changes will only affect the Office Portal.

What is being changed/added?

1. A new transfer confirmation email template is being added under Settings > Setup > General
2. We are updating the transfer and Group Transfer workflows to add a checkbox that can be enabled to send this email template upon successful completion of the enrollment transfer.

- This box will be labeled "Send Transfer Enrollment Notification Email" and will replace the "Send Enrollment Notification Email" option for transferred enrollments only.
3. We are updating Settings > Setup > Family Settings > Enrollment Emails to add a toggle to "Send Transfer Enrollment Notification Email by Default."
- If enabled, the "Send Transfer Enrollment Notification Email" box will automatically be checked during the transfer/Group Transfer workflow.
 - ❖ Upon launch, this setting will be automatically set to match the current functionality of the "Send Enrollment Notification Emails by Default" setting in your account.

How does this work with existing settings?

This change adds a new email template, a new setting in the Transfer/Group Transfer windows, and a new "Enrollment Emails" setting to determine whether or not that setting is auto-enabled.