

# Center Director Portal Guide: The Malvern Schools

This guide will walk you through the process of utilizing the portal's features effectively.

**NOTE:** The Center Director Portal is for **INTERNAL** use only, this is not to be shared with anyone outside of the company.

## Adding a New Inquiry:

- Click on the **"Add New Inquiry"** button to open the form.
- Fill out the necessary information about the prospective family, including contact details and any specific requirements or notes and submit the form.

## Scheduling a Tour:

- Select the **"Schedule a Tour"** button to arrange a visit for the prospective family.
- Select the calendar that corresponds with your school and select the date, time and family information.
- Once submitted, an email confirmation will be sent to the parent and to the center to add the appointment to your calendar.

## Initiating Enrollment:

- Select either **"Enroll a family"** button or the Tour Outcome **"Tour wants to enroll"** to begin the enrollment process for a family. (new families only)
- Fill in the required information, and include the confirmed schedule, start date, and room number.
- Once completed, submit the form to initiate the enrollment process.

## Waitlist a family in DCW:

- Select the **"Register to Waitlist in DCW"** button to send the DCW link to register onto the waitlist in DCW.
- Fill in the required information..
- Once completed, submit the form to initiate the registration process.

## Offer space to waitlisted family in DCW:

- Select the **"Waitlist to Enrolled"** button to send "How to complete Enrollment".
- Fill in the required information.
- Once completed, submit the form to initiate the 2<sup>nd</sup> part of the enrollment process.

**NOTE:** After submitting the form, your center DCW link will be shown to allow you to enroll the family on the spot.

**NOTE:** After the form is submitted, an email is immediately sent to the parent with enrollment forms and the link to set up their account in DCW.

## Recording Tour Outcomes:

- Choose the appropriate button based on the outcome of the tour or the status of the family.
- **"Tour No Show"** button will trigger a follow up email to reschedule the tour.
- **"Tour Undecided"** will trigger follow up conversations to move the family closer to enrollment.
- **"Tour wants to enroll"** select this ONLY if you have had the conversation with the family confirming their start date and schedule. You will add this information into the form to start the enrollment process.
- **"Tour Cancelled"** will trigger a follow-up email to reschedule the tour.
- **"Family Enrolled Before Tour"** select this if the Family has already enrolled.

Tour No Show - We will try and reschedule

Tour Undecided - We will follow up with family

Tour Waitlist/Future Start - We will follow up with family when a space is available

Tour wants to enroll - Confirmed space, family will be sent DCW link

Tour Cancelled

Family Enrolled Before Tour

## Support and Contact Information:

- Reminder of how to quickly access support from our general mailbox.

## Links and Resources:

- **"Connect App"** button will take you to the app store.
- **"Update Availability Tracker"** button will take you to your state's tracker where you can update your center's enrollment availability by age group.

**NOTE:** We ask that the tracker is updated weekly to ensure no delay in approving enrollment.

- There is a short video walking through how to use the Enrollment Portal.
- Find the list of client services team members for further assistance.