

Center Director Portal Guide

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.
- 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.

Add a Child to Existing DCW Account: All centers will use this new Button when you have an existing family that needs to enroll and register a sibling or new child to their account in DCW

Add Tour Follow-up Notes: After calling a family for a follow-up within 24-48 hours of their tour, use this button to enter the follow-up notes.

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 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 to the form to start the enrollment process.
- **"Tour Undecided"** will trigger follow-up conversations to move the family closer to enrollment.
- **"Tour waitlisted-unable to confirm start date"** Select this ONLY if you cannot guarantee a start date.
- **"Tour No Show"** button will trigger a follow-up email to reschedule the tour.
- **"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 wants to enroll - Confirmed space, family will be sent DCW link

Tour Undecided - We will follow up with family

Tour Waitlisted-Unable to confirm Start Date- We will contact the family when space is available

Tour No Show - We will try and reschedule

Tour Cancelled

Family Enrolled Before Tour

Support and Contact Information:

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

Links and Resources:

- **"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.

Client Services Team:

- Find the list of client services team members for further assistance.