

## 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:

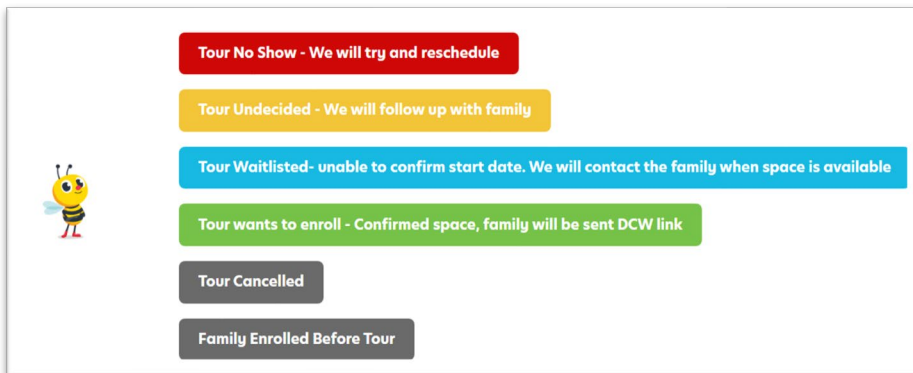
- Select either **"Enroll a family"** button or the Tour Outcome **"Tour wants to enroll"** to begin the enrollment process for a family.
- Fill in the required information, and include the confirmed schedule, start date, and room number.
- Once completed, submit the form to initiate the enrollment process.

**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 to the form to start the enrollment process.
- **"Tour waitlisted- unable to confirm start date"** Select this **ONLY** if you cannot guarantee a start date.
- **"Tour Cancelled"** will trigger a follow-up email to reschedule the tour.
- **"Family Enrolled Before Tour"** select this if the Family has already enrolled.



### 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.

### Client Services Team:

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