



## Entering Tour Results Using the CD Portal

**Recording Tour Outcomes:** Choose the appropriate button based on the outcome of the tour or the status of the family. **This step is Mandatory for ALL tours and to initiate ALL ENROLLMENTS.**

### 1. **“Tour wants to enroll”**

- Select this ONLY if you have a confirmed start date and approved schedule.
- You will add this information to the tour result form to start the enrollment process for CSC to be notified.
- Use this option for ALL enrollments i.e. staff children, back-up care, drop-in, walk-in tours, over-the-phone enrollment before tour, and anyone who does not have an existing DCW account and needs the link.
- Do not use it for returning families. They must use their existing DCW account. Ask CSC for help if needed.
- If the family has not toured or toured in the past needing the link again use this option. Note, NO TOUR on the tour result form, indicate the reason and add notes.
- The link will be sent.

### 2. **“Tour No Show”**

- Will trigger a follow-up email to reschedule the tour.
- This signals a task to the CSC to follow up with the family as well.
- “No Show” should only be used if a tour is scheduled and did not show.
- If the family tours later the original tour will be marked as a lost opportunity in the system as the tour results.
- Inform your CSC to put in the reschedule or use the schedule a tour option up top if they call about the no-show.

### 3. **“Tour Undecided”**

- Triggers a follow-up conversation with the CSC to move the family closer to enrollment.
- No link will be sent, family will need to reach out for the enrollment link.
- Input all the information as if they were starting for CSC to have the info, especially the start date if in the future (3+ mo.).
- If a family reaches out to the center and not the CSC for an enrollment link, either fill out another tour result as NO TOUR to send the link or ask your CSC to send the link.
- Do not send the link through email.



#### 4. **“Tour waitlisted-unable to confirm start date”**

- Select this ONLY if you cannot guarantee a start date or the family does not know when they want to start.
- This does NOT send the DCW registration link.
- We will offer space to families in order of when they were added to the waitlist as soon as we can confirm a start date.
- Do not use this option if you offer a start date to the family, unless the family requests to wait and be called back in the future.
- You can enroll for future start at any time if you have the space and the family wants to reserve the space.

#### 5. **“Tour Cancelled”**

- This will trigger a follow-up email to reschedule the tour.
- CSC will also reach out to follow up.
- If you follow up and the family rebooks use the portal to schedule another tour. This will replace the canceled tour and the tour results to connect to the new tour so you will not get a missed result.
- If they do a walk-in after a canceled tour, enter another tour result to reflect as if it was a booked tour. You do not need to book the tour again so you can input walk-in on the tour result form.

#### 6. **“Family Enrolled Before Tour”**

- select this if the Family has already enrolled prior to the scheduled tour.
- There will be a tour result entered by the CSC already, all you will need to enter is the associated email.
- New tour results are not needed.