

## T9: Fall Registration Made Easier

### Agenda:

1. Preparing your system
2. Personnel – How to use your staff
3. What should YOU do?
4. Making forms work for you
5. Set up hardware
6. If you need help

### I. Preparing your system

- a. New student download – When to do it?
  1. Request an initial student data file from admissions, the district, or your technician. (See Tracks Tech Tip #116 available on the Blue Bear website).
  2. Run Dr. Download at least ONE WEEK prior to start of registration. (Attend T4: Year End with Dr. Download and Student Update Utility). We'll have time to help you.
    - i. Brings in new students for the upcoming school year.
    - ii. You can purge unneeded history from last year's data.
    - iii. Prompts to save prior year data.
    - iv. Still Coming – Pre-registration items can be saved with a selection in Item Maintenance.
  3. After registration, request a final student data file.
  4. Run Student Update Utility (SUU) to update your records.
    - i. Only updates current student data or adds new records.
    - ii. SUU comes standard with Tracks.
  5. REMEMBER – Do these early! Thousands of other schools are doing registration at the same time as you are, so start preparing early.
  6. You can use "Add Customer" (AC) to add a temporary Customer.
- b. Test your POS equipment – Does it work?
  1. Test all your equipment – Management\Special Functions\POS Equipment Test.
    - i. Receipt printers
    - ii. Scanners
    - iii. Cash drawers
    - iv. Report printer
  2. Have backup equipment available whenever possible. Sometimes a district will share backup equipment. Remember our HOTSWAP program – call us by 11am and we'll overnight you a replacement.
- c. Extra Supplies - Order and have extras on hand:
  1. Receipt printer paper.
  2. Report printer paper.
  3. Printer ribbons and ink cartridges.
  4. Stationery supplies (pens, pencils, staples, etc).

d. Make signs to direct students through the registration lines:

1. Start Here
2. Station 1: Check your paperwork
3. Station 2: A-F Here, G-L Here, M-P Here, etc.
4. Station 3: ID Cards
5. Station 4: PE Clothes

II. Personnel – Use them efficiently. Here are the things they should do:

- a. Keep students away from you.
- b. Answer student questions. All questions should have been answered before they get to you.
- c. Tell students when to approach you.
- d. Check ID's, paperwork, and payments for the correct amounts.
- e. Split up tasks: One person sells, one person pulls the receipt.

III. What should you do?

- a. Avoid conversations with students/parents. Talk to them about summer vacation later.
- b. Use your staff wisely. Think about the flow ahead of time.
- c. Closeout often. Try it every couple hours if you're going to be open all day.
- d. Use TellerMate to count cash fast.
- e. Backup often.

IV. Print Forms – Making forms work for you.

- a. Use pre-made packets or handouts.
  1. Ideally, you would want to mail out a registration packet prior to registration including:
    - i. A letter explaining how registration will work and a schedule of dates and times students will register.
    - ii. The registration form (whether or not you have a scanner).
  2. Use BarMaster to print mailing labels for quick and easy distribution.
  3. Use BarMaster to print student bar codes for the Registration Form to facilitate a fast registration line. If students don't yet have a bar coded ID card, a volunteer someplace along the route (before you) can stick a bar coded label on their form. Now you can scan them even if they don't yet have a card.
    - i. If using an on-line early registration, include detail information on how to access and use it.

- b. Use the Registration Form to speed up the registration line – look in the Modules menu\BarMaster\Management.

1. Modify our existing Registration Form or make a new one.
2. Choose half or full page form.
3. Test all bar codes on the Work Screen BEFORE making copies. Then test again.
4. Print student bar codes for the forms to speed up the registration line (see above).

### Fall Registration - Student Order Form

Student Name \_\_\_\_\_ Student ID# \_\_\_\_\_ Date \_\_\_\_\_

Item Number	Description	Price	Item Number	Quantity	Amount
YRBK	YEARBOOK	\$60.00		_____	_____
SBCARD	SB CARD	\$15.00		_____	_____
PARK	PARKING PERMIT	\$5.00		_____	_____
PESHIRT	PE Shirt	\$7.00		_____	_____
PESHORT	PE Short	\$7.00		_____	_____
LOCK	LOCKS	\$5.00		_____	_____

**Check / Payment Reference:** \_\_\_\_\_ **Total:** \_\_\_\_\_

**Notes:** If you need additional information about these items, please see the Green Flyer in your registration packet or pick up a flyer on one of the tables at school.

Primary

Student Email Address: \_\_\_\_\_

Mother/Guardian Email Address: \_\_\_\_\_

Father/Guardian Email Address: \_\_\_\_\_

- c. If you don't have a scanner, use the Star Key Buttons on the Work Screen – Management\System Maintenance\Star Button Maintenance.
  - 1. Select the items you use during registration for quick entry.
  - 2. Use the 18 buttons, or type a "\*" then the number to sell the item.

V. Set up your hardware.

- a. If you are moving your computer to a new location, mark the cables.
  - 1. Color code your computers.
    - i. Computer #1 is green labels.
    - ii. Computer #2 is red labels, etc.
- b. Place equipment properly.
  - 1. Is it properly accessible to the volunteer workers?
  - 2. Are your cables out of reach of students? Things can get disconnected when students inadvertently step on loose cables.
  - 3. Make sure your equipment is safe.
    - i. Is it on stable furniture?
    - ii. Is it safe from water or soda spills?
    - iii. Do you have surge protectors and proper electrical connections?
- c. Test all equipment after moving – BEFORE you start.
  - 1. POS Equipment Test – AGAIN!

VI. If you need help!

- a. A phone is a must! If a phone jack is not accessible, have a cell phone.
  - 1. If no cell phone, make sure you have walkie talkies or intercom system.
  - 2. Keep a phone list available for additional help.
    - i. Blue Bear Support
    - ii. Hardware tech
    - iii. District network tech

VII. Process the money you receive often.

- a. Closeout often
  - 1. Use manila envelopes – Include the following:
    - i. Office copy of receipts.
    - ii. Closeout report (if report printer is available, otherwise save it as an Adobe PDF and print later). BE CAREFUL to name the closeouts differently each time!
    - iii. All cash, checks and credit cards.
    - iv. Count the drawer later! Or use Tellermate Cash Counting solutions to count fast NOW!
  - 2. Possibly have extra cash drawer trays with locking lids.
- b. Create a separate bank deposit for each closeout. Put the right date on it.
- c. Make timely deposits. Take the money to the bank, even if you don't balance. If your money count does not tie to your Closeout Report, make an offsetting entry to Cash Over/Short. Hopefully, you'll figure it out later.

VIII. Other helpful Tracks options.

- a. Set up a web store for an on-line registration – Attend T5: Accepting Credit Card Payments with RevTrak.
- b. Textbooks can now be checked out during registration using TexTrack. Attend B3: Big Picture – TexTrack. Textbooks can also be checked out by teachers in the classroom using Web Viewer.
- c. Parking permits can be assigned during registration through Vehicle Maintenance. But DON'T enter all the vehicle information now – it will slow down the line. You can just enter a parking permit number and then fill in the rest of the information later. (You should print a bunch of forms to capture all the information you need!)
- d. Equipment Tracking for sports equipment, wood shop/metal shop equipment, photography cameras, etc.

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