Guide

Business Office Prep for the New School Year

A Guide to Billing and Enrollment Readiness

Fall is closer than it feels. For private school business offices, the weeks between now and the first day of school are critical. Families are finalizing decisions, billing cycles are launching, and enrollment records need to be accurate before the doors open. The steps you take now will determine how smoothly your office operates when volume picks up.

This guide walks you through two practical checklists: one for admissions and enrollment and one for billing. Together, they outline the actions your team can take right now to start the new school year with clean data, satisfied families, and dependable financial operations.

Admissions and Enrollment Fall Readiness Checklist

Step 1: Close Prior Year Applications

Start by closing out applications from the prior year. This keeps your records current and prevents outdated files from cluttering your active application pool heading into fall.

What to Do

Review your prior year applications and confirm that each one has a final resolution, whether admitted, declined, or withdrawn. Update any applications still listed as pending, and confirm that no prior year records carry forward unintentionally.

Why it Matters

Clean application data is the foundation of accurate enrollment reporting. Leaving prior year applications open can distort your numbers and complicate the reporting you will complete later in this checklist.

Step 2: Update Enrollment Statuses

With prior year applications closed, turn your attention to enrollment statuses. Every student record should reflect an accurate, current status before the school year begins.

Common Status Updates to Review

- Students who were offered enrollment but have not yet confirmed
- Students who have withdrawn or transferred
- New students who have been accepted and confirmed for the upcoming year

Tips for Accuracy

Cross-reference your enrollment statuses against the communications your admissions team has sent or received. If your team uses a shared tracking document, reconcile that data with your official records now, while the details are still easy to verify.

Step 3: Promote Students to the Upcoming School Year

Once enrollment statuses are accurate, promote returning students to the upcoming school year. This step aligns your student records with the new academic year and confirms that the right students appear in the right grade levels when fall begins.

What to Do

Run a pre-promotion audit to confirm that grade-level assignments are correct. Then promote students, either in groups or individually where exceptions apply. Review the results afterward to confirm accuracy before you continue.

Important

Students who are not returning, transferring out, or graduating should not be promoted. Verify that these records are appropriately closed before you run the promotion process. A few minutes of review here prevents time-consuming corrections once the school year is in motion.

Step 4: Report on Application, Enrollment, and Demographic Data

Complete your fall readiness process by generating reports that capture the full picture of your school's application and enrollment activity. This data supports planning conversations, informs financial forecasting, and helps your leadership team enter fall with a clear view of where things stand.

Key Reports to Generate

- Total applications received compared to the prior year
- Enrollment conversion rates by grade level
- Demographic breakdowns of your enrolled population
- Year-over-year comparisons where applicable

How to Use this Data

Share these reports with your leadership team to support budget planning and enrollment strategy discussions. When you can customize the format, tailor each report so the right information reaches the right people in the way that works best for them.

Billing Best Practices

Step 1: Make Billing Adjustments

Before your billing cycle begins, gather every piece of information you need to make necessary adjustments. This is your opportunity to correct discrepancies, apply credits or changes, and confirm each account reflects the most current family data.

What to Do

Review any outstanding adjustment requests from families or staff. Collect supporting documentation before making changes and confirm that every adjustment is recorded accurately before you move to the next step.

Why it Matters

Errors caught before billing runs are far easier to resolve than those discovered afterward. Taking time here protects your accuracy and reduces the likelihood of billing disputes once the school year is underway.

What Information You Need for an Adjustment

- The family or account identifier
- The reason for the change, such as a payment plan update, sibling discount, or fee correction
- Supporting documentation, including approvals or family requests
- The effective date the adjustment should apply

Step 2: Review Billing Accounts

Once adjustments are complete, review each billing account to confirm it is accurate and current. A careful review helps you spot issues before families do, which builds trust and reduces inbound questions as fall approaches.

What the Account Tells You Right Away

- Balances that appear inconsistent with the family's payment plan
- Accounts with missing or outdated payment information
- Enrollment or contract details that no longer match the account
- Any flags, holds, or alerts that need attention

Tips for a Thorough Review

Sort accounts by status to prioritize those that need attention first. Resolve outstanding issues before your billing cycle launches to avoid carrying errors into the new school year. When possible, confirm that each family's contact and payment details are current, since accurate records support smoother communication throughout the year.

Step 3: Run Billing Reports

Reports are your most valuable tool for staying on track. Reviewing your data now helps you monitor financial health, identify trends, and confirm that your billing operations are ready for fall volume.

Recommended Reports to Run

- Payment plan status reports to confirm families are on track
- Outstanding balance reports to flag accounts that need follow-up
- Billing cycle summaries to verify totals and reconcile with your financial records
- Adjustment logs to confirm recent changes applied correctly

Pro Tip

Save your most frequently used report formats so you can pull them quickly when the school year begins. A consistent reporting routine saves time and keeps your data reliable across the year.

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Tips for a Strong Back-to-School Season

Stay ahead of family communication.

Families are finalizing plans and have questions about billing, schedules, and next steps. Send timely, accurate updates that keep them informed and reduce inbound calls and emails to your office. Proactive outreach now builds the trust that carries through the school year.

Use reports proactively.

Do not wait until an issue surfaces to review your data. Set a regular cadence for checking key numbers before fall arrives so your team can course-correct while there is still time.

Keep your data clean.

Accurate records depend on the quality of the data your team enters. Make it a practice to resolve flagged records promptly rather than letting them accumulate before the busy season begins.

Lean on your resources.

If a step feels unclear or a process is not working as expected, ask for help early. Consult your internal documentation, your team, or your software provider's support resources rather than working around an issue that could affect your data when it matters most.

Ensure Your Team Is Ready for Fall

Back-to-school preparation does not have to feel rushed or overwhelming. With this guide, your business office can move through admissions, enrollment, and billing readiness with accuracy and confidence, so your school is ready to welcome families from day one.

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