Eligibility Ending Letter

Last Modified on 11/10/2026 1:08 pm CST

Complete the following steps to create a letter for notifying people when they are reaching the end of their eligibility period.

Step 1 - Create an Ad Hoc Query

Tool Search: Filter Designer

See the article Student Filter fields for Ad Hoc Reporting for more information about this type of Ad Hoc Query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Create an Ad Hoc query with the Filter Data Type of Student.</td></tr>
<tr><td>2</td><td>Enter a Query Name and select the following fields.
Demographics > lastName; firstName
FRAM > Eligibility > eligibility; endYear; endDate</td></tr>
<tr><td>3</td><td>Enter the following filter data.
<table>
<tr><th>Field</th><th>Operator</th></tr>
<tr><td>posElig.eligibility</td><td>IN</td></tr>
<tr><td>posElig.endYear</td><td>=</td></tr>
<tr><td>posElig.endDate</td><td>=</td></tr>
<tr><td>posEligToday.eligibilityToday</td><td>=</td></tr>
</table>
If you are using the prior year's end date and want to exclude students who have an eligibility in the current year, be sure to add the posEligToday.eligibilityToday field to your Ad hoc filter.

For example, the 2023-2024 Default Expiration Date is 9/21/2024. If a student has a 23-24 eligibility end date of 9/21/2024 and has a 24-25 eligibility that has a start date any time after 9/21/2024, adding posEligToday.eligibilityToday = none will remove this student from the report.</td></tr>
</table>

Step	Action
4	Click the **Save & Test** button. Make sure **All Schools** and **All Calendars** is selected on the top bar to get a district-wide list.

Step 2 - Create the Letter Format

Tool Search: Letter Designer

See the Letter Designer article for more information about this tool.

Step	Action
1	Select one of the following Letter Format Options then click the **New Format** button. • The **Blank Form Letter** format will generate letters exactly as they are created within the Letter Designer. • The **Address Form Letter** format will generate the same information as the Blank Form format but it also includes the student's address information.
2	Enter a **Name** for the letter format and type the message in the text field.
3	Click the **Save Format** button.

Step 3 - Generate the Eligibility Ending Letters

Tool Search: Letter Builder

See the Letter Builder article for more information about this tool.

Step	Action
1	In the **Saved Filters** column, select the Ad Hoc query you created in Step 1 - Create an Ad Hoc Query.

Step	Action
2	In the Saved Letters column, select the letter format you created in Step 2 - Create the Letter Format.
3	Select one of the following **Sort Options**. • **Alpha** - Data is sorted alphabetically by student last names. • **Grade/Alpha** - Data is sorted by grade level and then alphabetically by student last names. • **Zip** - Data is sorted by address zip code (used for bulk mail rates). • **Teacher** - Data is sorted by teacher.
4	Make sure **All Schools** and **All Calendars** is selected on the top bar to get a district-wide list then click the **Build Letters** button.

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