Eligibility End Date Wizard

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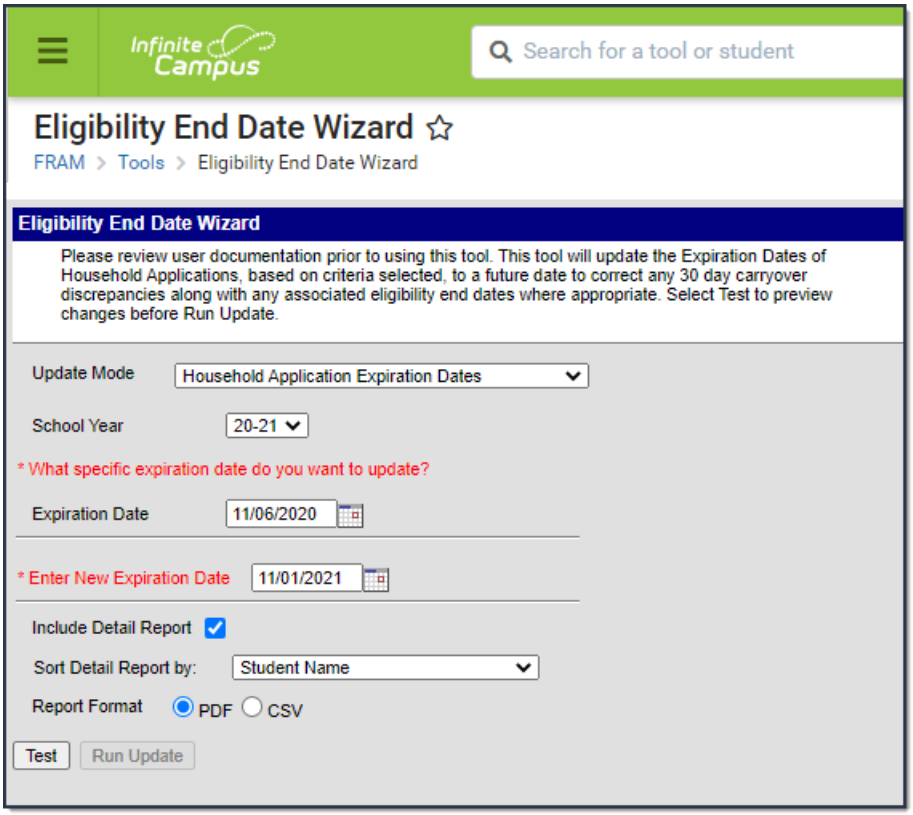
Tool Search: Eligibility End Date

The Eligibility End Date Wizard allows districts to update Household Application expiration and Eligibility end dates en masse. This tool was designed to help correct future 30 day carryover discrepancies occurring at the end of school years.

What can I do?	What do I need to know?
Update Household Application Expiration Dates Update Imported and Manually Entered Eligibility End Dates	About the Household Application Expiration Dates Update Mode About the Imported & Manually-entered Eligibility End Dates Update Mode



About the Household Application Expiration Dates Update Mode

Once the Eligibility End Date Wizard is run for an Update Mode of Household Application Expiration

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Dates, the Eligibility End Date Report appears in a separate window, describing all changes made.

Summary of Eligibility End Date Changes

This section is a summary of Eligibility records impacted by the change, broken down by the Certified Type and Eligibility (Free, Reduced, Paid) of each record.

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Eligibility End Date Report
End Date Updated to: 07/29/2012
Update Mode: Household Application Expiration Dates
School Year: 11-12
Expiration Date Selected to Update: 10/15/2012
Sort by: Student Name

Summary of Eligibility End Date Changes

Certified Type	Free	Reduced	Paid	Total
Direct	0	0	0	0
Income	6	0	0	6
Categorical	0	0	0	0
Override	0	0	0	0
Runaway	0	0	0	0
Homeless	0	0	0	0
Foster	0	0	0	0
Migrant	0	0	0	0
Temporary/No Income	0	0	0	0
Head Start	0	0	0	0
RCCI	0	0	0	0
Early Childhood	0	0	0	0
Declined	0	0	0	0
Denied	0	0	0	0
Did Not Apply	0	0	0	0
Total	6	0	0	6

In the example above, six records with a Certified Type of Income and an Eligibility of Free were impacted by a change to the person's Household Application Expiration Date and an updated eligibility record. The Detail: Update Records section defines each affected person.

Summary of Household Application Expiration Date Changes Only

This section reports the total number of Household Applications where only the Expiration Dates were updated. Eligibility records associated with the Household Applications could not be updated to a new end date because the new end date would have changed other existing eligibility records for students.

* The Summary below reports the total number of Household Applications where only the Expiration Dates were updated. In these cases, the eligibility records associated with the Household Applications could not be updated to the new end date because the new end date would have changed other existing eligibility records for students.

***Summary of Household Application Expiration Date Changes Only**

	Total
Only Household Application Expiration Dates Updated	7

Warnings: Gap in Eligibility Created

This section appears if a gap was created between a student's existing updated eligibility record and subsequent eligibility records.

If this is unacceptable, users should consider the following:

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- Not use the Eligibility End Date Wizard.
- Change criteria on the Eligibility End Date Wizard editor so that no gap in Free/Reduced eligibility is created.
- Select the Run Update button, knowing gaps in eligibility will be created for some students and manually correcting these gaps, as appropriate based on District policy/procedures.

** The Warning section below indicates the process of updating the eligibility end dates will result in a gap between the end date of the updated record and a subsequent eligibility record. In most cases, a gap between Free/Reduced eligibilities should not occur. Please review these records and correct gaps where appropriate.

**Warnings: Gap In Eligibility Created

Paid Start Date	Paid End Date	Student Name	Eligibility	Certified Type	Original Eligibility End Date	Application Reference #	Application Name	Original Application Exp. Date
07/30/2012	10/15/2012	, Adam	Free	Income	10/15/2012	2868	, Nancy	10/15/2012

Detail: Updated Records

This section identifies which student eligibility record end dates were updated to match the updated Household Application Expiration Date.

Detail: Updated Records

Student Name	Eligibility	Certified Type	Original Eligibility End Date	Application Reference #	Application Name	Original Application Exp. Date
, Anthony J	Free	Income	10/15/2012	2839-V	, Annette	10/15/2012
, Carly A	Free	Income	10/15/2012	2839-V	, Annette	10/15/2012
, Seth I	Free	Income	10/15/2012	2827-A	Household	10/15/2012
, Zena	Free	Income	10/15/2012	2868	, Nancy	10/15/2012
, Adam	Free	Income	10/15/2012	2868	, Nancy	10/15/2012

Detail: Updated Household Application Expiration Dates Only

This section identifies all household applications where the Expiration Date was updated but no student eligibility record end dates were updated. Eligibility records associated with the Household Application could not be updated to a new end date because the new end date would have changed other existing eligibility records for students.

Detail: Updated Household Application Expiration Dates Only

Application Reference #	Application Name	Original Application Exp. Date
2884	Household	10/15/2012
2839-A	, Annette	10/15/2012
2839-V	, Annette	10/15/2012

Update Household Application Expiration Dates

The Eligibility End Date Wizard provides the ability to update Household Application expiration

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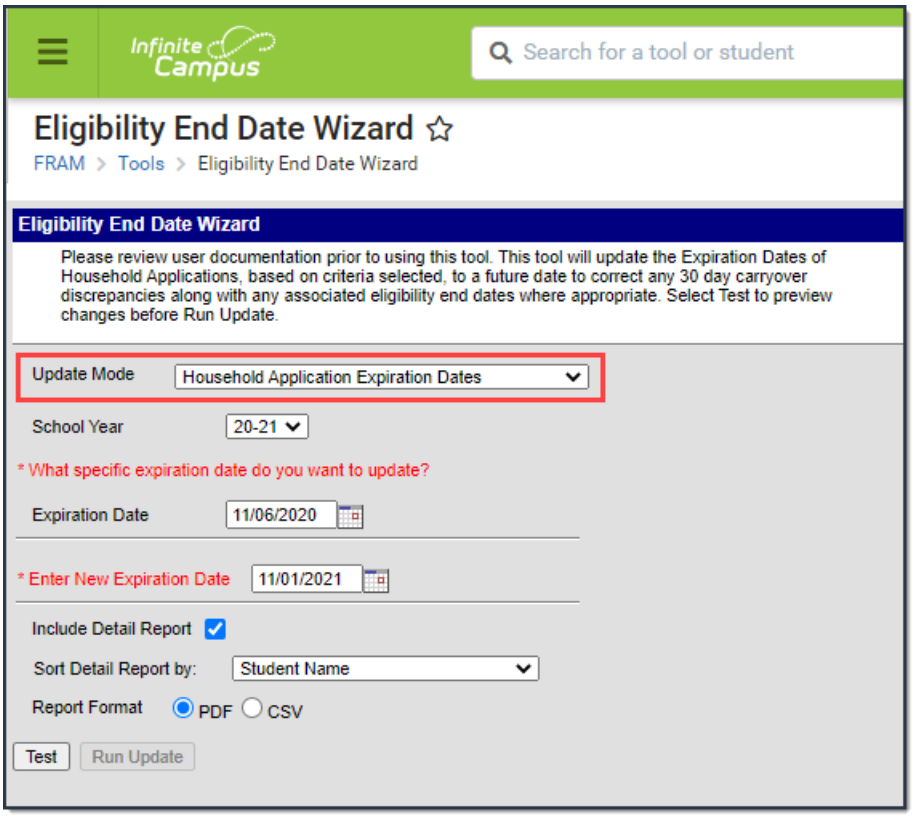
dates en masse.

Before using the Eligibility End Date Wizard, users should consider the following:

- When updating the Expiration Date for a Household application, users must verify the Default Expiration Date is correctly entered on the school year on the FRAM Preferences tool.
- This wizard will only update the latest end-dated eligibility associated with the application being updated.
- The wizard will not update any Excluded applications.
- Users will not be able to update any eligibilities to dates existing in the past (retroactive date) due to the potential impact on state and meal reporting. If users need to change any eligibility end date to a date in the past, this will have to be manually performed by the district.



1. Select an **Update Mode** of Household Application Expiration Dates.
2. Select the **School Year** in which household applications should be updated.
3. Enter which specific expiration date to update. Only household applications with this Expiration Date will be updated.
4. Enter the **New Expiration Date**. All household applications matching the Expiration Date and School Year entered will be updated to this date.
5. Mark the **Include Detail Report** checkbox to have additional information about each updated household application included on the report generated once the Test or Run Update buttons are selected.
6. If the Include Detail Report checkbox is marked, determine how household information is sorted on the report by selecting a **Sort Detail Report by** option.

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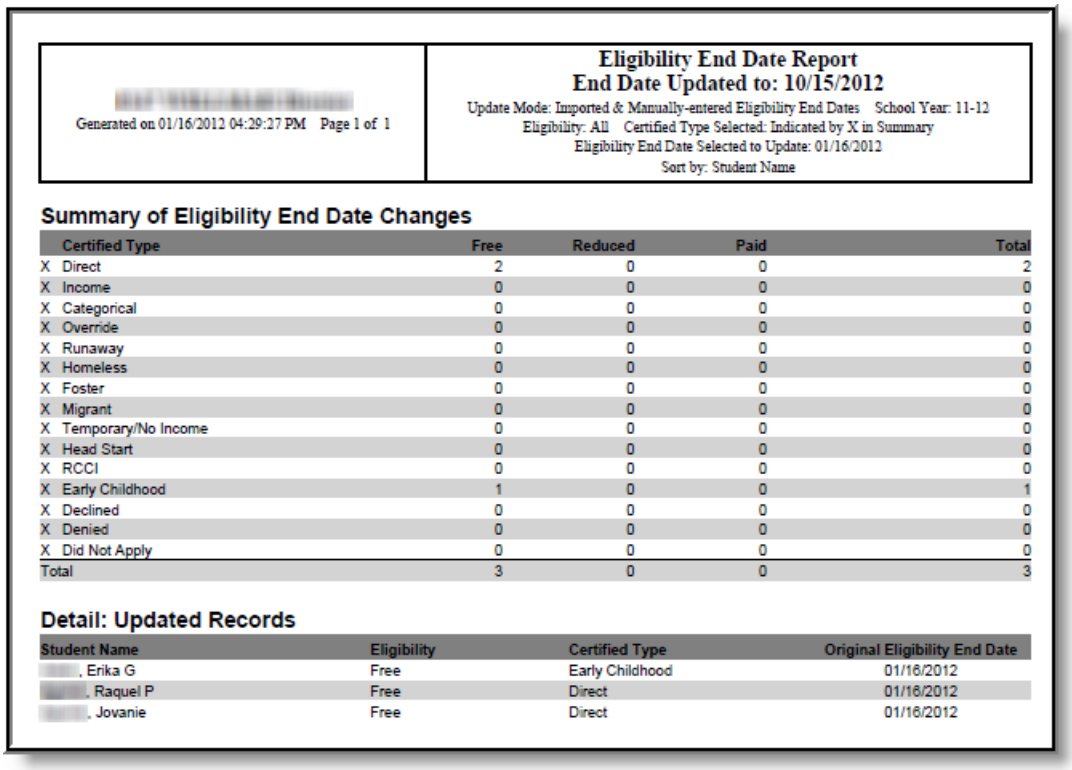
7. Select a **Report Format**.
8. To review which household applications will be impacted by this change before changing expiration dates in the database, click the **Test** button. The Eligibility End Date Report appears in a separate window.
9. To update all household applications which meet the criteria entered above, select the **Run Update** button. The Eligibility End Date Report appears in a separate window, detailing which household applications were updated.

About the Imported & Manually-entered Eligibility End Dates Update Mode

Once the Eligibility End Date Wizard is run for an **Update Mode** of Imported & Manually-entered Eligibility End Dates, the Eligibility End Date Report appears in a separate window, describing all changes made.



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Eligibility End Date Report
End Date Updated to: 10/15/2012
Update Mode: Imported & Manually-entered Eligibility End Dates School Year: 11-12
Eligibility: All Certified Type Selected: Indicated by X in Summary
Eligibility End Date Selected to Update: 01/16/2012
Sort by: Student Name

Summary of Eligibility End Date Changes

	Certified Type	Free	Reduced	Paid	Total
X	Direct	2	0	0	2
X	Income	0	0	0	0
X	Categorical	0	0	0	0
X	Override	0	0	0	0
X	Runaway	0	0	0	0
X	Homeless	0	0	0	0
X	Foster	0	0	0	0
X	Migrant	0	0	0	0
X	Temporary/No Income	0	0	0	0
X	Head Start	0	0	0	0
X	RCCI	0	0	0	0
X	Early Childhood	1	0	0	1
X	Declined	0	0	0	0
X	Denied	0	0	0	0
X	Did Not Apply	0	0	0	0
Total		3	0	0	3

Detail: Updated Records

Student Name	Eligibility	Certified Type	Original Eligibility End Date
, Erika G	Free	Early Childhood	01/16/2012
, Raquel P	Free	Direct	01/16/2012
, Jovanie	Free	Direct	01/16/2012

The **Summary of Eligibility End Date Changes** section is a summary of all student eligibility records changed, broken down by Certified Type and Eligibility (Free, Reduced, Paid).

The **Detail: Updated Records** section describes each student eligibility record updated with the new End Date value.

The **Warning: Gap in Eligibility Created** section appears if a gap was created between a student's existing updated eligibility record and subsequent eligibility records. See the Warning: Gap in Eligibility Created section above for more information.

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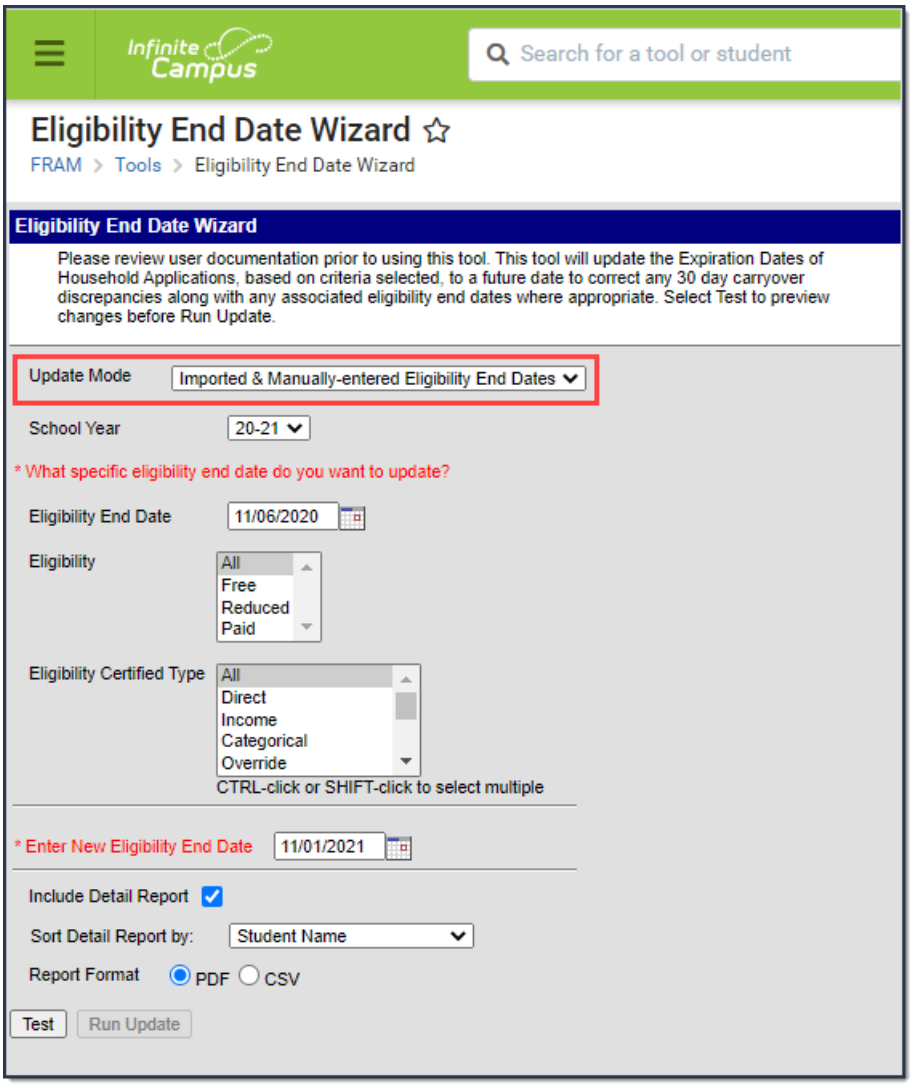
Update Imported and Manually Entered Eligibility End Dates

The Eligibility End Date Wizard also provides the ability to update end dates for imported and manually entered Eligibility records.

Before running the Eligibility End Date Wizard, users should consider the following:

- The wizard will only update the latest eligibility record for a student for the School Year and criteria selected. If multiple non-consecutive eligibility records exist for a student within the School Year selected, only the student's latest end dated eligibility record will be updated. Any other existing eligibility within the School Year will not be updated
- Users will not be able to update any eligibilities to dates in the past (retroactive dates) due to the potential impact on state and meal reporting. If users need to change any eligibility end date to a date in the past, this will have to be manual performed by the district.



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1. Select the **Imported & Manually-entered Eligibility End Dates** *Update Mode*.
2. Select the **School Year** in which Eligibility end dates should be updated.
3. Enter which **Eligibility End Date** to update. Only student Eligibility records with this End Date will be updated.
4. Select the **Eligibility** of records to be updated. Only Eligibility records with this Eligibility status and the Eligibility End Date entered will be updated.
5. Select the Eligibility Certified Type of records to be updated. Only Eligibility records with this Eligibility Certified Type, the Eligibility value selected and the Eligibility End Date entered will be updated.
6. Enter the **New Eligibility End Date**. All Eligibility records that meet report criteria will have their End Date changed to this date.
7. Mark the **Include Detail Report** checkbox to have additional information about each updated Eligibility record included on the report generated once the Test or Run Update buttons are selected.
8. If the Include Detail Report checkbox is marked, determine how Eligibility records are sorted on the report by selecting a **Sort Detail Report by** option.
9. Select a **Report Format**.
10. To review which Eligibility records will be impacted by this change before changing end dates in the database, click the **Test** button. The Eligibility End Date Report appears in a separate window.
11. To update all Eligibility records that meet the criteria entered above, select the **Run Update** button. The Eligibility End Date Report appears in a separate window, detailing which Eligibility records were updated.

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