Enrollment Cleanup Wizard

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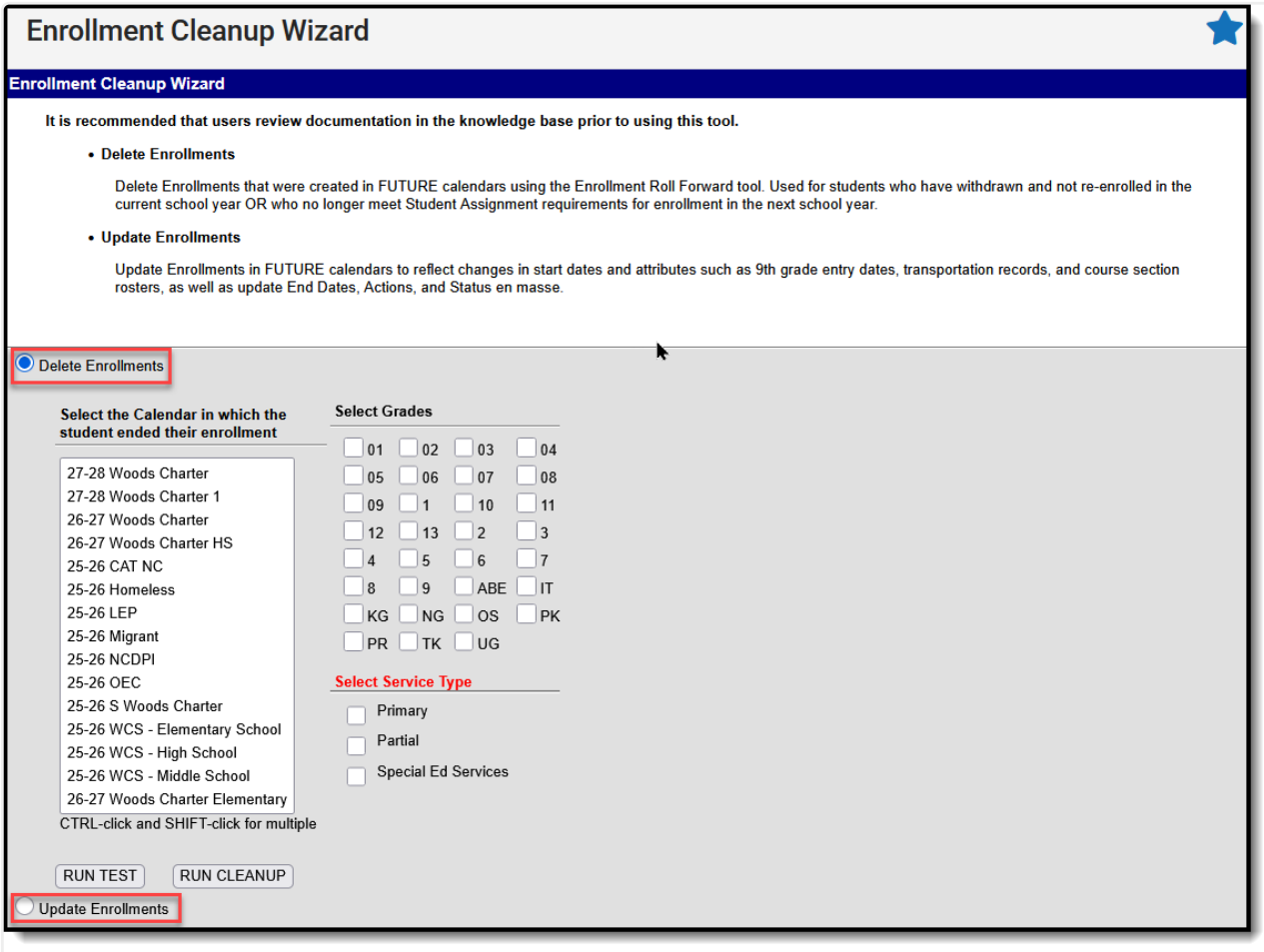
Path: Student Information > General Student Information > Enrollment Cleanup Wizard

The Enrollment Cleanup Wizard contains two modes - **Delete Enrollments** and **Update Enrollments**. These modes allow for the removal and update of future enrollments in future school years, or the current school year.

Reasons for performing these functions include:

- A student moved prior to the end of the last school year but after enrollments were rolled forward.
- The curriculum director built calendars with a start date of school in the next school year, but that date has since changed.
- A student may have been promoted to the next grade level for the next school year, but was unable to meet all requirements for that next grade level due to unforeseen circumstances.
- Updates were made to a student's active enrollment after enrollments were rolled forward.

Both the Delete Enrollments and the Update Enrollments modes include a **RUN TEST** option that returns the total number of enrollments that are going to be removed or updated. **RUN TEST** is a best practice step as there is no undo option for accidentally deleting enrollments or updating start dates.



Enrollment Cleanup Wizard Editor

Before you begin

- It is recommended that SIF and Ed-Fi be turned off before using this tool. Turn the tools on again after enrollments have been deleted or updated.

- The Update Enrollments process requires the selection of a target calendar and an Ad hoc Filter that includes the students whose enrollments need to be modified.
  - A simple filter of Student Last Name, First Name and Grade Level is all that is needed.
  - Additional fields need to be added to exclude students from enrollment cleanup - e.g., when students in a particular grade level start at a later date than other grade levels.
  - Special care should be taken to omit any student from the filter whose enrollment SHOULD NOT be included in this action.

See the Enrollment Roll Forward/End Batch/Cleanup Wizard Tool Rights article for information about rights needed to use this tool.

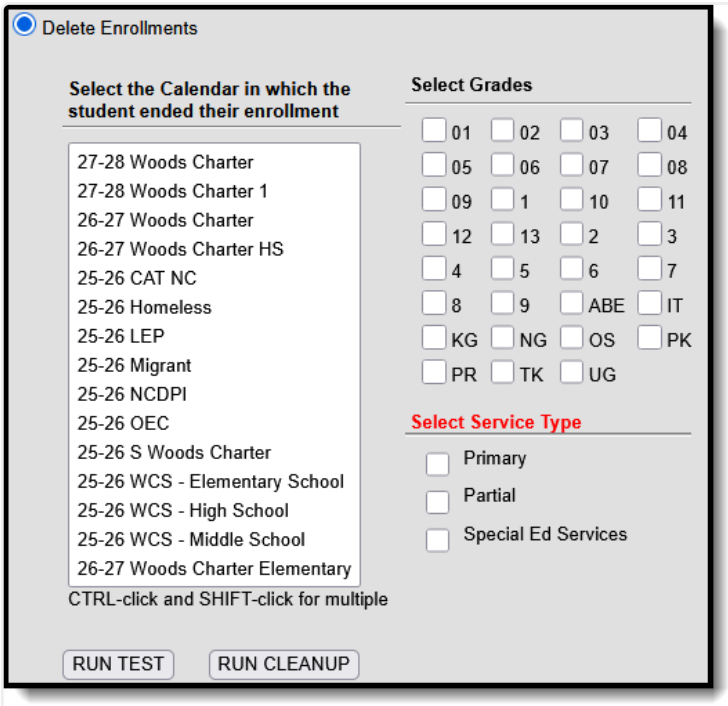
Delete Enrollments

Enrollments in future calendars can be deleted when enrollments were rolled forward, and:

- The student's previous enrollment was ended prior to the end date of the last term and the student has not re-enrolled in the same calendar for the next school year; OR
- The student fails to meet the Student Assignment requirements for next year's enrollment.

Things to know about deleting future enrollments

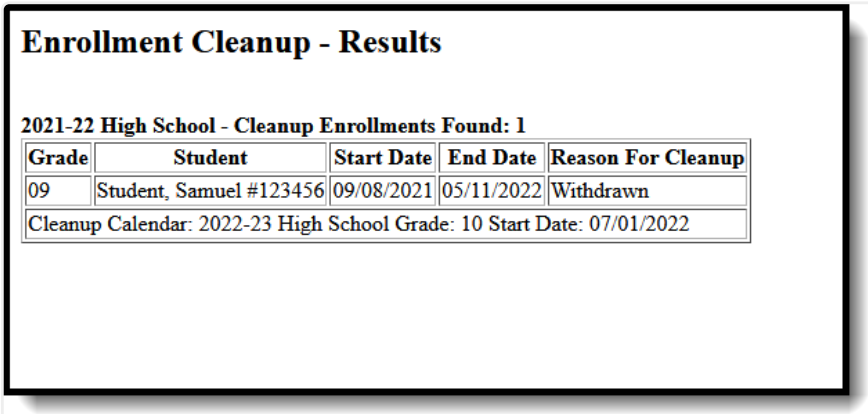
- Depending on the district, several enrollment roll forward processes may occur. Use this cleanup wizard to catch any enrollments that meet the above criteria prior to the start of the new school year.
- Only those enrollments created using the Enrollment Roll Forward tool are deleted. Any enrollments that have been created manually in future school years are not deleted.
- Students whose enrollments have been deleted are removed from any Course Section Rosters onto which they were placed in the future calendar.
- For districts that end enrollment records at the end of the school year (end of the last term in the calendar), those enrollments are not included in the cleanup as the students are enrolled through the end of the year.



Delete enrollments editor options

Delete Enrollments in a Future Calendar

1. Select the **Calendar** in which the student ended their enrollment.
2. Select the **Grade Levels** from which to remove the enrollment records.
3. Select the **Service Type** of enrollment records.
4. Click the **Run Test** button to review which enrollment records meet the requirements to be deleted.
5. Click the **Run Cleanup** button to **permanently remove** the enrollment records for the students who meet the above requirements.
6. A **Results Summary** report displays for both the Run Test and the Run Cleanup buttons, listing the number of deleted enrollments.



Enrollment Cleanup - Results

2021-22 High School - Cleanup Enrollments Found: 1

Grade	Student	Start Date	End Date	Reason For Cleanup
09	Student, Samuel #123456	09/08/2021	05/11/2022	Withdrawn
Cleanup Calendar: 2022-23 High School Grade: 10 Start Date: 07/01/2022				

Enrollment cleanup results summary report

Reason for Cleanup	Cleanup Criteria

Reason for Cleanup	Cleanup Criteria
Withdrawn	The enrollment was removed as Withdrawn because it met ALL of the following conditions: 1. This enrollment's end date (must exist) is before the primary term schedule's last term date. 2. There was an enrollment rolled forward from this enrollment to the following school year (to any school). 3. There is not another active enrollment in this calendar with a NULL end date or an end date that is greater than or equal to the latest term date (e.g. ended on enrollment, the re-enrolled through the end of the last term).
Student Assignment	The enrollment was removed as Student Assignment because it met ALL of the following conditions: 1. The Enable Student Assignment Validation system preference MUST be set to Yes. See the System Preferences article for instruction on enabling this setting. 2. The Calendar and Grade require assignment. 3. The student is not in the school boundaries for the school. 4. The student has no normal override to attend the school. 5. The student has an override that follows program boundaries to attend the school but the student's new address is no longer in the program boundaries.

Update Enrollments

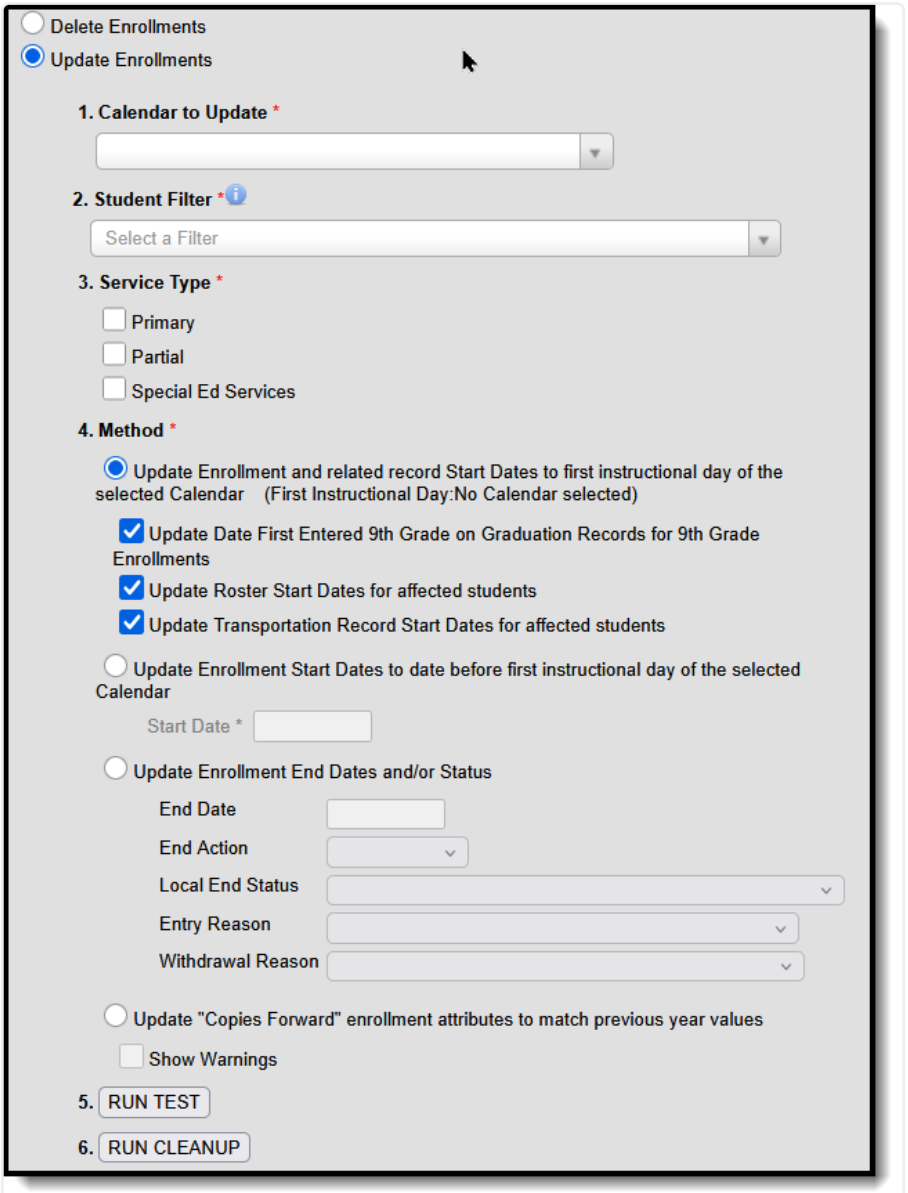
During the normal process of preparing calendars and scheduling students for the next school year, enrollments may be rolled forward before all details of the next year are determined. The methods available in Update Enrollment mode are intended to address changes that may happen after roll forward is completed, such as calendar dates and enrollment attributes.

Things to know about updating enrollments

- Your state and/or district may have added fields, hidden fields, or changed whether or not a certain field is required in the Enrollments tool.
- If your state or district has defined or altered required elements on the Enrollments tool, it may be necessary to update those elements or fields on the enrollment records of impacted students after update/cleanup is run.

For districts linked to State Edition, a Batch Resync event is created and scoped to the destination calendar of the cleanup action. That resync event pushes updates to enrollment, roster, and graduation records that have been modified by the cleanup action to the state edition.

A Batch Resync is ONLY created when the destination calendar end year matches the zone end year.



Update Enrollment options

Update Enrollments to first instructional day of selected calendar

This method updates enrollment start dates to the first instructional date of the calendar. On the Days tool this is the first day in the school year that is marked as an Instruction day.

When updating to the first instructional day of the selected calendar, other dates can be part of this change as well:

- Date First Entered 9th Grade (Student Information > General > Graduation)
- Roster Start Dates (Scheduling > Courses > Sections > Rosters)
- Transportation Start Dates (Student Information > General > Transportation)

The selection of these dates can be removed if needed.

Enrollments created using the Enrollment Roll Forward tool and enrollments created manually are included in the update when they match the selection criteria.

1. Select the **Calendar** in which the enrollment needs to be updated. When an Instructional day has not been set in the selected calendar, an error message displays.
2. Select an **Ad hoc Filter**. Note that enrollments are updated for ALL STUDENTS in the filter who match the selected calendar and service type. **Exclude** any students from this filter when their enrollment SHOULD NOT be updated.
3. Select the **Service Type** of enrollment records.
4. Select "**Update Enrollment and related record Start Dates to the first instructional date of the selected calendar"**. The first instructional date is displayed in the parentheses when one has been set on the selected calendar.
5. Select any of the following **optional** additional records to include in the update. All options are automatically selected, but the process can be completed without these marked.
    - Update Date First Entered 9th Grade on Graduation Records for 9th Grade Enrollments
    - Update Roster Start Dates for affected students
    - Update Transportation Record Start Dates for affected students
6. Click the **Run Test** button to review which enrollment records meet the requirements to be updated.
7. Click the **Run Cleanup** button to update the target enrollments for students meeting requirements.
8. A **Results Summary** report displays for both the Run Test and the Run Cleanup buttons, listing how many enrollments were updated.

Update Enrollment Start Dates to date before first instructional day

This method allows the user to enter an Enrollment Start Date that is before the first instructional day of the selected calendar. The entered date must be on or after the selected calendar start date. This option is used for certain state reporting setups or for third party integrations (transportation information, for example).

1. Select the **Calendar** in which the enrollment needs to be updated.
2. Select an **Ad hoc Filter**. Note that enrollments are updated for ALL STUDENTS in the filter who match the selected calendar and service type. Exclude any students from this filter when their enrollment should NOT be updated.
3. Select the **Service Type** of enrollment records.
4. Select **"Update Enrollment Start Dates to date before the first instructional day of the selected calendar".**
5. Enter a **Start Date** for the enrollments that is On or AFTER the start date of the calendar (Start Date on the Calendar Information editor) and BEFORE the current first day of school.
6. Click the **Run Test** button to review which enrollment records meet the requirements to be updated.
7. Click the **Run Cleanup** button to update the target enrollments for the students who meet requirements to be updated. A Results Summary report displays listing how many enrollments were updated.

Update Enrollment End Dates and/or Status

This method allows the user to update enrollment end dates and statuses in the selected calendar for a filtered group of students. Note that fields and data entry requirements can vary by state and/or district. Follow your local practices when entering or selecting information to update.

1. Select the **Calendar** in which end dates and/or statuses need to be updated.
2. Select an **Ad hoc Filter**. Note that enrollments are updated for ALL STUDENTS in the filter who match the selected calendar and service type. **Exclude** any students from this filter when their enrollment SHOULD NOT be updated.
3. Select the **Service Type** of enrollment records.
4. If updating the **End Date** for the filtered students, enter the new End Date.
5. Choose an **End Action** if appropriate.
6. Select the **Local End Status** if appropriate.
7. **Entry Reason** and **Withdrawal Reason** only display for states that have enabled those fields. Select an option if appropriate.
8. Click the **Run Test** button to review which enrollment records meet the requirements to be updated.
9. Click the **Run Cleanup** button to update the target enrollments for the students who meet requirements. A

Results Summary report displays listing how many enrollments were updated. **Note for Cross-Site Users: Messages are sent out for any impacted students.**

Update Copies Forward enrollment attributes

This method updates all enrollment attributes related to a student that are marked as Copies Forward in the Attribute/Dictionary. Examples of typical Copies Forward Enrollment attributes include Homeless, Migrant, and Enrollment District.

Certain enrollment attributes are calendar specific and are blocked from this update process, even when the user has marked the attribute as Copies Forward.

- grade
- classRankExclude
- externaLMSExclude
- startDate
- endDate
- endAction
- serviceType
- startStatus
- endStatus
- startComments
- endComments
- schoolChoice
- earlyRelatedService
- eoPrimaryServiceSetting
- secondarSpecialEdStatus
- localStartStatusTypeID
- localEndStatusTypeID
- startStatusBIE
- endStatusBIE

1. Select the **Calendar** in which the enrollment needs to be updated.
2. Select an **Ad hoc Filter**. Note that enrollments are updated for ALL STUDENTS in the filter who match the selected calendar and service type. Exclude any students from this filter when their enrollment SHOULD NOT be updated.
3. Select the **Service Type** of enrollment records.
4. Select the **Update Copies Forward Enrollment** attributes to match previous year values.
5. Mark the **Show Warnings**, if desired.
    - This option lists the name, student number, and enrollment ID of the enrollments that were included in the selected Ad hoc, calendar, and service type, but are not subject to an update for one of the following reasons:
        - Enrollment not created by rolling previous enrollment forward
        - Enrollment created by rolling forward but was not active on last day of term
6. Click the **Run Test** button to review the total number of enrollment records that meet the requirements to be updated.
7. Click the **Run Cleanup** button to update the target enrollments for the students that meet the specified requirements.

Enrollment and Enrollment Cleanup Logic

Student enrollment records are created in Campus in one of the following ways:

- Created manually
- Rolled forward from last year's calendar - In this situation, student enrollments from a previous year's calendar are rolled into the next year's calendar, typically as part of the process that promotes students from one grade level to the next grade level in sequence.

When using the Enrollment Cleanup Wizard, the way an enrollment record was created determines whether it can be "cleaned up." The table below lists what Mode and Method cleans up which created enrollment type.

Mode	Method	Enrollment Creation Method
Delete Enrollments	--	Enrollment Roll Forward

Mode	Method	Enrollment Creation Method
Update Enrollments	Update Enrollment and related record Start Dates to first instructional day of the selected Calendar	Enrollment Roll Forward; Manual Creation
Update Enrollments	Update Enrollment Start Dates to date before first instructional day of the selected Calendar	Enrollment Roll Forward; Manual Creation
Update Enrollments	Update Enrollment End Dates and/or Status • Follow your local practices to ensure you are updating fields as required. • Entry Reason and Withdrawal Reason only appear for states that have enabled these fields. • No logic is associated with droplist selections.	Enrollment Roll Forward; Manual Creation
Update Enrollments	Update Copies Forward Enrollment Attributes	Enrollment Roll Forward