

# Enrollment Cleanup Wizard

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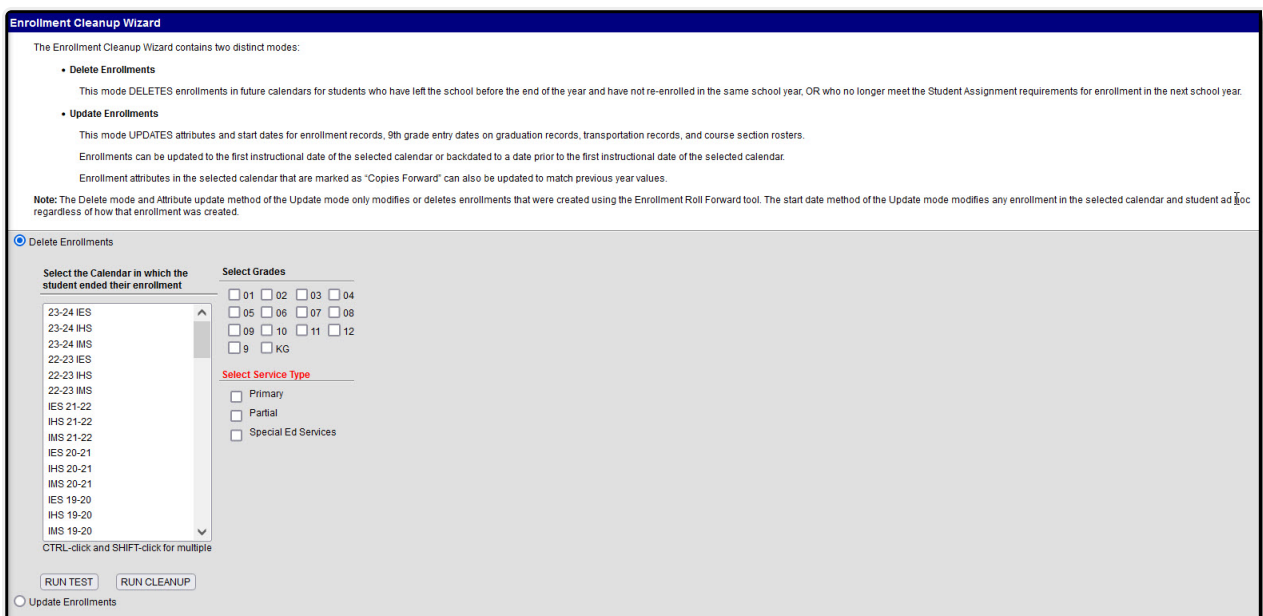
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Tool Search: Enrollment Cleanup Wizard

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. There are many reasons why an enrollment may need to be removed or updated, including:

- 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. **This is a best practice step; there is no undo option for accidentally deleting enrollments or updating start dates.**



The screenshot shows the 'Enrollment Cleanup Wizard' interface. At the top, it states: 'The Enrollment Cleanup Wizard contains two distinct modes:'. Below this, two modes are listed:

- Delete Enrollments**: This mode DELETES enrollments in future calendars for students who have left the school before the end of the year and have not re-enrolled in the same school year, OR who no longer meet the Student Assignment requirements for enrollment in the next school year.
- Update Enrollments**: This mode UPDATES attributes and start dates for enrollment records, 9th grade entry dates on graduation records, transportation records, and course section rosters. Enrollments can be updated to the first instructional date of the selected calendar or backdated to a date prior to the first instructional date of the selected calendar. Enrollment attributes in the selected calendar that are marked as "Copies Forward" can also be updated to match previous year values.

A note at the bottom of the mode descriptions states: 'Note: The Delete mode and Attribute update method of the Update mode only modifies or deletes enrollments that were created using the Enrollment Roll Forward tool. The start date method of the Update mode modifies any enrollment in the selected calendar and student assignment regardless of how that enrollment was created.'

The 'Delete Enrollments' mode is selected. The interface includes a list of calendars to choose from, a 'Select Grades' section with checkboxes for grades 01 through 12 and KG, and a 'Select Service Type' section with checkboxes for Primary, Partial, and Special Ed Services. At the bottom, there are 'RUN TEST' and 'RUN CLEANUP' buttons, and a radio button to switch to 'Update Enrollments'.

*Enrollment Cleanup Wizard Editor*

Before using this tool, it is recommended that SIF and Ed-Fi be turned off. Once enrollments have been deleted or updated, turn the tools on again.

This 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 would need to be added when certain students should not be included in the enrollment cleanup - e.g., 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.**

## Tool Rights

Full access to the Enrollment Cleanup Wizard requires **R(ead)** rights to the Enrollment Cleanup Wizard.

The screenshot shows the 'User Tool Rights Editor' interface. It features a search bar at the top and a list of tool categories on the left. The 'Enrollment Cleanup Wizard' tool is highlighted with a red box, and its 'Read' checkbox is checked. The interface also includes checkboxes for 'All', 'Write', 'Add', and 'Delete' for each tool.

Tool	All	Read	Write	Add	Delete
Instruction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General Student Administration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Form Setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PLP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Response to Intervention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special Ed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Behavior	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Trip	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Athletics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SME new module	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Preapproval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Module Setup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Enrollment Cleanup Wizard</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enrollment End Batch Wizard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enrollment Cleanup Wizard Tool Rights

## 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
Update Enrollments	Update Enrollment Start Date to First Instructional Day	Enrollment Roll Forward; Manual Creation
Update Enrollments	Update Enrollment Start Dates to before first instructional day	Enrollment Roll Forward; Manual Creation
Update Enrollments	Update Copies Forward Enrollment Attributes	Enrollment Roll Forward

## 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.

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.

Delete Enrollments

**Select the Calendar in which the student ended their enrollment**

- 23-24 IES
- 23-24 IHS
- 23-24 IMS
- 22-23 IES
- 22-23 IHS
- 22-23 IMS
- IES 21-22
- IHS 21-22
- IMS 21-22
- IES 20-21
- IHS 20-21
- IMS 20-21
- IES 19-20
- IHS 19-20
- IMS 19-20

CTRL-click and SHIFT-click for multiple

**Select Grades**

01  02  03  04  
 05  06  07  08  
 09  10  11  12  
 9  KG

**Select Service Type**

Primary  
 Partial  
 Special Ed Services

Update Enrollments

*Delete Enrollment Options*

The student is removed from any Course Section Rosters in the future calendar in which they may have been scheduled or placed.

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 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*

Reason for Cleanup	Cleanup Criteria
Withdrawn	<p>The enrollment was removed as Withdrawn because it met ALL of the following conditions:</p> <ol style="list-style-type: none"> <li>1. This enrollment's end date (must exist) is before the primary term schedule's last term date.</li> <li>2. There was an enrollment rolled forward from this enrollment to the following school year (to any school).</li> <li>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).</li> </ol>
Student Assignment	<p>The enrollment was removed as Student Assignment because it met ALL of the following conditions:</p> <ol style="list-style-type: none"> <li>1. The Enable Student Assignment Validation system preference MUST be set to Yes. Please see the <a href="#">System Preferences</a> article for instruction on enabling this setting.</li> <li>2. The Calendar and Grade require assignment.</li> <li>3. The student is not in the school boundaries for the school.</li> <li>4. The student has no normal override to attend the school.</li> <li>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.</li> </ol>

## Update Enrollments

[Update Enrollments to First Instructional Day](#) | [Update Enrollment Start Dates to BEFORE First Instructional Date](#) | [Update Copies Forward Enrollment Attributes](#)

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. After the roll forward action is completed, calendar dates and enrollment attributes may change. The methods included in the Update Enrollment mode are intended to address these changes.

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 Enrollments to First Instructional Day

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.

Delete Enrollments  
 Update Enrollments

**1. Calendar to Update \***

23-24 IHS

**2. Student Filter \* i**

Select a Filter

**3. Service Type \***

Primary  
 Partial  
 Special Ed Services

**4. Method \***

Update Enrollment and related record Start Dates to first instructional day of the selected Calendar (First Instructional Day:08/21/2023)

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

Update Enrollment Start Dates to date before first instructional day of the selected Calendar

Start Date \*

Update "Copies Forward" enrollment attributes to match previous year values

Show Warnings

5.

6.

*Update Enrollments - First Instructional Date Method*

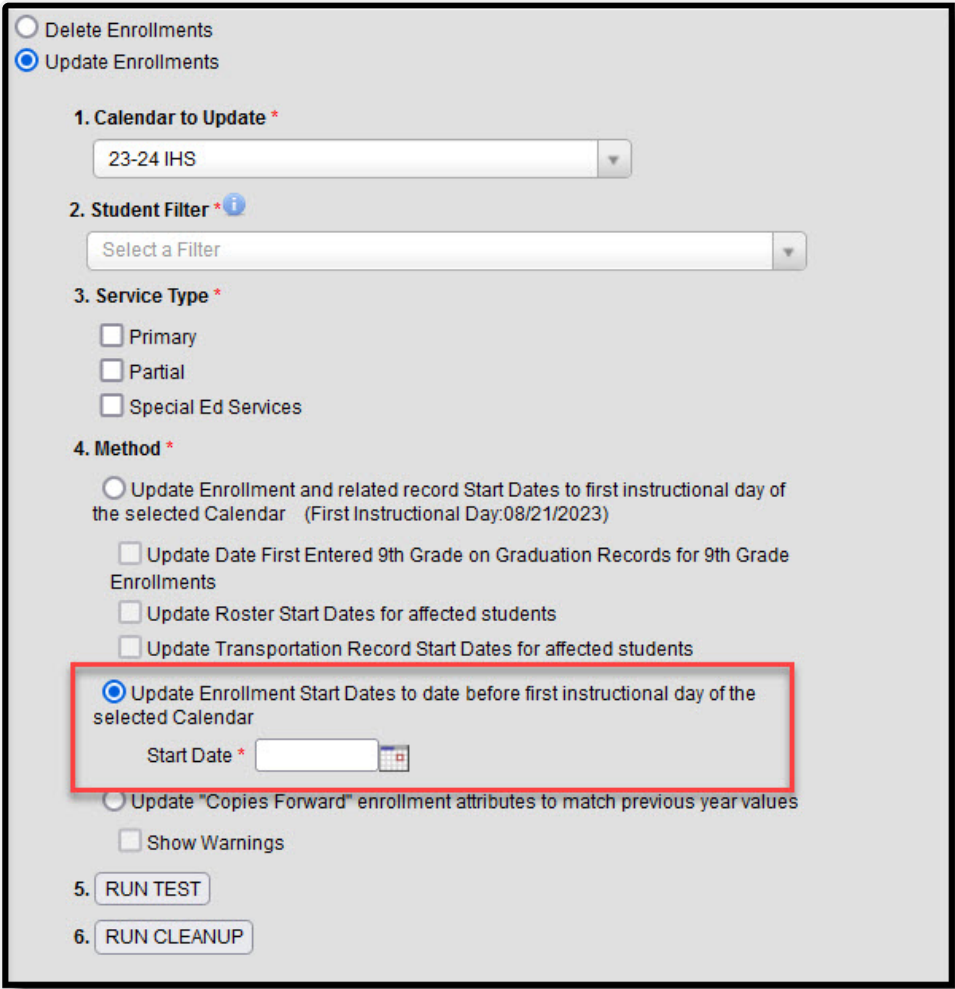
## Update Enrollments to the First Instructional Date

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 the **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 the students who meet the above requirements noted in Step 4.

- 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 BEFORE First Instructional Date

This method allows the user to enter an Enrollment Start Date that is before the first instructional date. 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).



Delete Enrollments  
 Update Enrollments

**1. Calendar to Update \***  
 23-24 IHS

**2. Student Filter \***  
 Select a Filter

**3. Service Type \***  
 Primary  
 Partial  
 Special Ed Services

**4. Method \***  
 Update Enrollment and related record Start Dates to first instructional day of the selected Calendar (First Instructional Day:08/21/2023)  
 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  
 Update Enrollment Start Dates to date before first instructional day of the selected Calendar  
 Start Date \*

Update "Copies Forward" enrollment attributes to match previous year values  
 Show Warnings

5. RUN TEST  
 6. RUN CLEANUP

*Update Enrollments - Before First Instructional Date Method*

## Update Enrollments to Before First Instructional Date

- Select the **Calendar** in which the enrollment needs to be updated.
- 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.
- Select the **Service Type** of enrollment records.
- Select the **Update Enrollment Start Dates to date before the first instructional day**



**of the selected calendar.**

5. Enter the desired **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 the above requirements noted in Step 4.
8. A Results Summary report displays for both the Run Test and the Run Cleanup buttons, listing how many enrollments were updated.

## 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.

The screenshot shows a web interface for updating enrollments. At the top, there are two radio buttons: 'Delete Enrollments' (unselected) and 'Update Enrollments' (selected). Below this are four numbered sections:

- 1. Calendar to Update \***: A dropdown menu showing '23-24 IHS'.
- 2. Student Filter \* *i***: A dropdown menu with 'Select a Filter'.
- 3. Service Type \***: Three checkboxes: 'Primary', 'Partial', and 'Special Ed Services', all of which are unchecked.
- 4. Method \***: Two radio button options:
  - Update Enrollment and related record Start Dates to first instructional day of the selected Calendar (First Instructional Day:08/21/2023). This option has three unchecked checkboxes: 'Update Date First Entered 9th Grade on Graduation Records for 9th Grade Enrollments', 'Update Roster Start Dates for affected students', and 'Update Transportation Record Start Dates for affected students'.
  - Update Enrollment Start Dates to date before first instructional day of the selected Calendar. This option has a 'Start Date \*' text input field.

The 'Update Enrollment Start Dates to date before first instructional day of the selected Calendar' option is selected. Within this selected option, the sub-option 'Update "Copies Forward" enrollment attributes to match previous year values' is selected and highlighted with a red rectangular box. Below this sub-option, the 'Show Warnings' checkbox is checked. At the bottom of the form, there are two buttons: '5. RUN TEST' and '6. RUN CLEANUP'.

*Update Enrollments - Update Copies Forward Enrollment Attributes Method*

Certain enrollment attributes are calendar specific and are blocked from this update process,

even when the user has marked the attribute as Copies Forward.

▶ [Click here to expand...](#)

The **Show Warnings** 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:

- The enrollment was not created by rolling the previous enrollment forward.
- The enrollment was created by rolling forward but it was not active on the last day of the term.

## Update Enrollment Attributes

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.
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 who meet the above requirements noted in Step 4.

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## Previous Versions

[Enrollment Cleanup Wizard \[.2231 - .2239\]](#)

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