

Enrollment Cleanup Wizard

Last Modified on 10/22/2022 9:37 am CDT

[Tool Rights](#) | [Enrollment and Enrollment Cleanup Logic](#) | [Delete Enrollments](#) | [Update Enrollments](#)

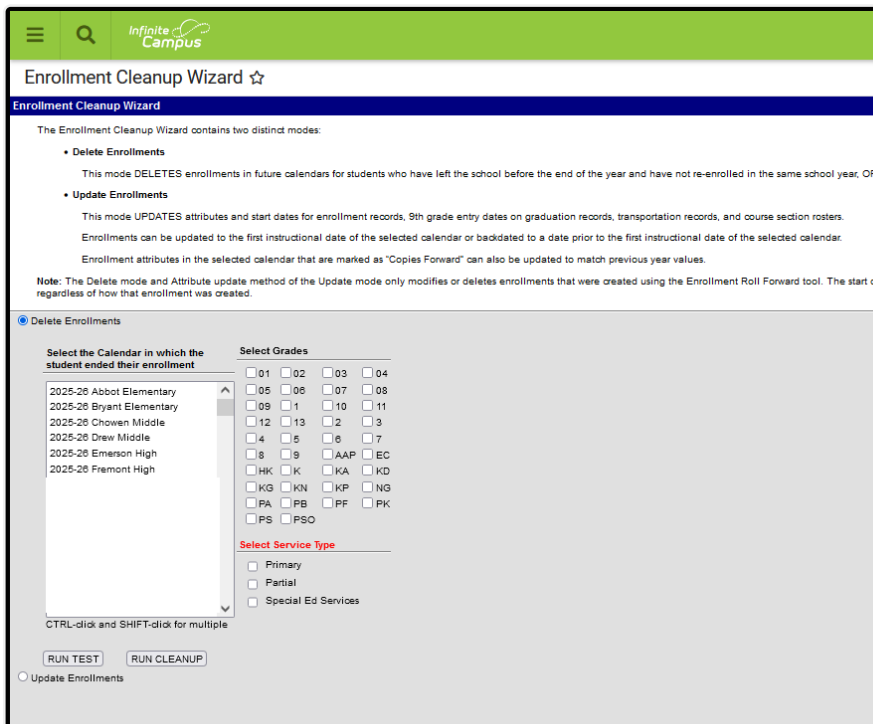
Classic View: System Administration > Student > Enrollment Cleanup Wizard

Search Terms: 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.**



Enrollment Cleanup Wizard

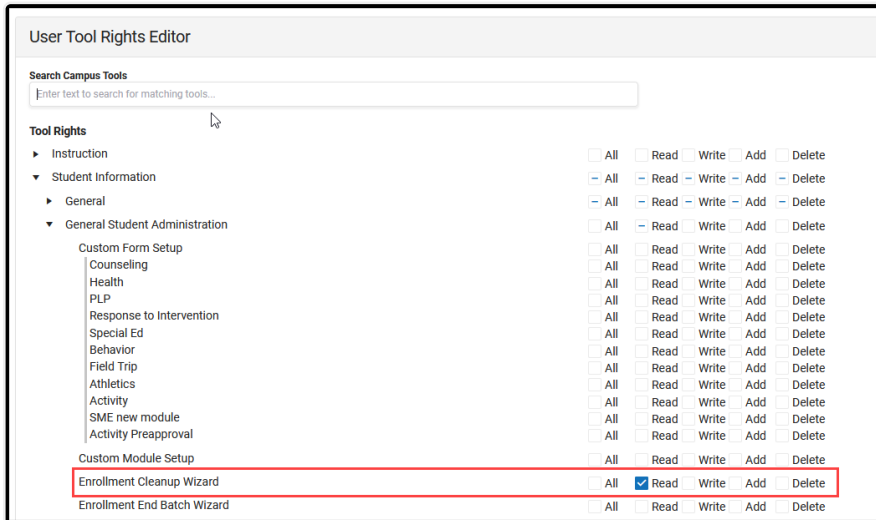
Before using this tool, it is recommended that SIF and Ed-Fi be turned off. Once enrollments have been deleted or updated, turn the tools on again.

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.



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

- 2025-26 Abbott Elementary
- 2025-26 Bryant Elementary
- 2024-25 Colfax Middle
- 2024-25 Abbott Elementary
- 2024-25 Bryant Elementary
- 2024-25 Drew Middle
- 2023-24 Abbott Elementary
- 2023-24 Ewing High
- 2023-24 Bryant Elementary
- 2023-24 Fremont High

CTRL-click and SHIFT-click for multiple

Select Grades

<input checked="" type="checkbox"/> 01	<input checked="" type="checkbox"/> 02	<input checked="" type="checkbox"/> 03	<input type="checkbox"/> 04
<input type="checkbox"/> 05	<input type="checkbox"/> 06	<input type="checkbox"/> 07	<input type="checkbox"/> 08
<input type="checkbox"/> 09	<input type="checkbox"/> 1	<input type="checkbox"/> 10	<input type="checkbox"/> 11
<input type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 2	<input type="checkbox"/> 4
<input type="checkbox"/> 5	<input type="checkbox"/> 9	<input type="checkbox"/> AAP	<input type="checkbox"/> EC
<input type="checkbox"/> HK	<input type="checkbox"/> K	<input type="checkbox"/> KA	<input type="checkbox"/> KD
<input type="checkbox"/> KG	<input type="checkbox"/> KP	<input type="checkbox"/> NG	<input type="checkbox"/> PA
<input type="checkbox"/> PB	<input type="checkbox"/> PF	<input type="checkbox"/> PK	<input type="checkbox"/> PS
<input type="checkbox"/> PSO			

Select Service Type

- Primary
- Partial
- Special Ed Services

Update Enrollments

Delete 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.

A Results Summary report displays for both the Run Test and the Run Cleanup buttons, listing how many enrollments were deleted.

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

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 *
2023-24 Fremont High

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:07/03/2023)

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.

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.
 - o Update Date First Entered 9th Grade on Graduation Records for 9th Grade Enrollments
 - o Update Roster Start Dates for affected students
 - o 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.

Enrollment Cleanup - Test Mode

2022-23 High School - Cleanup Enrollments Found: 287

Records are not updated
Modified By Date and Time is not updated

[Update Enrollment Test Mode Results Summary](#)

Enrollment Cleanup - Results

2022-23 High School - Cleanup Enrollments Found: 287

Modified By Date, Time and User is updated properly

[Update Enrollment Results Summary](#)

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 *

2022-23 High School

2. Student Filter *ⁱ

12th Grade C-M

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: 09/06/2022)

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 * 08/15/2022

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

Show Warnings

5.

6.

[Before First Instructional Date Method](#)

Update Enrollments to Before First Instructional Date

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 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.

- 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.

Enrollment Cleanup - Test Mode	Enrollment Cleanup - Results
2022-23 High School - Cleanup Enrollments Found: 288	2022-23 High School - Cleanup Enrollments Found: 288
Records are not updated Modified By Date and Time is not updated	Modified By Date, Time and User is updated
<i>Update Enrollment Test Mode Results Summary</i>	<i>Update Enrollment Results Summary</i>

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.

Delete Enrollments
 Update Enrollments

1. Calendar to Update *

2022-23 High School

2. Student Filter *ⁱ

12th Grade A-M

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:09/06/2022)
 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 Copies Forward 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.

<div data-bbox="236 936 826 1435"> <p>Enrollment Cleanup - Test Mode</p> <p>2023-24 Fremont High - Cleanup Enrollments Found: 7</p> <p>Enrollment Fields to be Updated</p> <ul style="list-style-type: none"> • citizenship • disability1 • disability2 • disability3 • disability4 • disability5 • giftedTalented • homeless • servingDistrict • singleParent • specialEdSetting • stateExclude • attendanceType • cISPSEOConEnr • enrollingDistrict • enrollingSchool • placingDistrict • pseol • specialCare • supplementalServices • PrivateSchool • SNAP_IEP <p>Records are not updated Modified By Date and Time is not updated</p> <p>The following students were not updated: Enrollment was not created by Roll Forward</p> <ul style="list-style-type: none"> • Hailey Student (Student Number: 123456) - Enrollment ID: 654321 <p>The following students were not updated: Enrollment that was rolled forward was not active on the last day of the last term</p> </div> <div data-bbox="236 1451 826 1491" style="text-align: center;"> <p><i>Update Enrollment Test Mode Results Summary</i></p> </div>	<div data-bbox="879 936 1362 1630"> <p>Enrollment Cleanup - Results</p> <p>2022-23 High School - Cleanup Enrollments Found: 287</p> <p>Enrollment Fields to be Updated</p> <ul style="list-style-type: none"> • citizenship • disability1 • disability2 • disability3 • disability4 • disability5 • giftedTalented • homeless • percentEnrolled • servingDistrict • singleParent • specialEdSetting • stateExclude • attendanceType • cISPSEOConEnr • enrollingDistrict • enrollingSchool • placingDistrict • pseol • specialCare • supplementalServices • PrivateSchool • SNAP_IEP <p>Records are not updated Modified By Date and Time is not updated</p> </div> <div data-bbox="879 1646 1362 1686" style="text-align: center;"> <p><i>Update Enrollment Results Summary</i></p> </div>
---	---

Previous Versions

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

[Enrollment Cleanup Wizard \[.2128 - .2227\]](#)