Eligibility Ending Letter

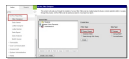Last Modified on 10/22/2022 9:51 am CDT

Complete the following steps to create a letter for notifying people when they are reaching the end of their eligibility period.
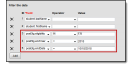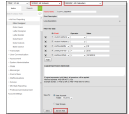
Step 1 - Create an Ad Hoc Query | Step 2 - Create the Letter Format | Step 3 - Build the Eligibility Ending Letters

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Step 1 - Create an Ad Hoc Query

PATH: Ad Hoc Reporting > Filter Designer > Query Wizard > Student

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

Step	Action	Example
1	Create an Ad Hoc query with the Filter Data Type of **Student**.	
2	Enter a **Query Name** and select the following fields. • Demographics > **lastName**; **firstName** • FRAM > Eligibility > **eligibility**; **endYear**; **endDate**	

Step	Action	Example
3	Enter the following filter data.	

Field	Operator	Value
posElig.eligibility	IN	**F,R**
posElig.endYear	=	The year in which the eligibility is ending. **Example** If it is a 17-18 eligibility, the end year is 2018.
posElig.endDate	=	The date on which the student's eligibility is expiring.
posEligToday.eligibilityToday	=	None

> 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 2019-2020 roll-forward end date is 10/21/2020. If a student has a 19-20 eligibility end date of 10/21/2020 and has a 20-21 eligibility that has a start date any time after 10/21/2020, adding **posEligToday.eligibilityToday** = none will remove this student from the report.

Step	Action	Example
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

PATH: *Ad Hoc Reporting > Letter Designer*

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

Step	Action	Example
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 - Build the Eligibility Ending Letters

PATH: *Ad Hoc Reporting > Letter Builder*

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

Step	Action	Example
1	In the **Saved Filters** column, select the Ad Hoc query you created in Step 1 - Create an Ad Hoc Query.	
2	In the Saved Letters column, select the letter format you created in Step 2 - Create the Letter Format.	

Step	Action	Example
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.	