Senior Systems Student Withdrawal Release Bulletin

Inside

Previously, when a student withdrew from a school, the process was disjointed and relied upon the various offices' ability to communicate that a student had withdrawn. Vital information could be lost.

This procedure has been enhanced to be an integrated process. In this release bulletin, we go over the new setup and procedures in the SENIOR SYSTEMS modules.

Implementation

Before you begin to utilize the new Withdrawing Students feature, your school should determine how to use the system. For your convenience, we have provided a checklist of questions that need to be answered by your school so that you can determine how to implement the new Student Withdrawal Process (next page).

Remember that the needs of your school will vary, depending on which modules you have installed. Please contact your project coordinator if you need assistance.

New Security Keys

Your school can specify which users should be able to withdraw students from the school. By default, all users who can access the Student Maintenance Name tab will have this ability, since they could in previous versions of SENIOR SYSTEMS.

Once your school determines which users can withdraw students, your system administrator must make changes to users' security keys; see page 3.

Student and A/R Groups

First, your school will need to set up your Student and A/R Groups to identify which groups represent "Withdrawn" and who should be notified when a student withdraws.

Turn to page 3 for details.

Withdrawing Students

The withdrawal process begins when a user selects a withdrawn-type group from the Student or A/R Group drop-down list in Student Maintenance.

When the user saves the record, they will see the new Withdrawal Wizard. Turn to page 7 to learn more.

Withdrawn Families

Schools that have ALUMNI/ DEVELOPMENT will be able to update student and parent constituent information as needed once the withdrawal process has been completed in BUSINESS OFFICE and REGISTRAR.

The particulars of these updates will vary, depending on how your school has set up the system. Turn to page 16 to start reading about this part of the process.

Overview

What organizations need to do to implement and run the new Student Withdrawal Process will vary from one school to another, depending on which modules you have installed and how you use them.

First, we go over the overall process, and then we discuss the details of the new screens. This release bulletin covers the entire process. Once everything is set up, most users will only use a fraction of what we have discussed.

Your school might have a business process already in place for the order in which students are withdrawn from SENIOR SYSTEMS, but even if there is no fixed procedure you can use the new Student Withdrawal feature. As each user withdraws a student from his or her respective SENIOR SYSTEMS module, notices can be sent to other users so that they know to continue the withdrawal process.

Students can be withdrawn from This Year or Next Year. When users withdraw students, they must enter dates and reasons. Your school can decide whether to force them to notify users of other modules; if you enforce notifications, users will be required to send notices to users of certain modules, depending on what you have installed and what modules have already withdrawn the student (see “Rules” on page 25).

Implementation Decision Checklist

To decide how to implement the new **Student Withdrawal Process**, you school can use the following checklist. Your school only needs to make decisions relevant to the modules you have installed.

	Decision	Action
❑	Who should be allowed to withdraw students?	*Remove all other users’ access to the Student and/or A/R Groups security keys (see below).*
❑	What groups indicate current students, graduates, and withdrawn students?	*You need to set up all of your groups as appropriate; see pages 3 and 6.*
❑	Which modules should be responsible for deleting what student information?	*When setting up the Student or A/R Groups in those modules, select the checkboxes of the information that needs to be deleted (pages 4 and 6).*
❑	How does your school take attendance?	*Be sure to delete students from advisor, homeroom, and/or class rosters when they are withdrawn.*
❑	Who should be notified of withdrawn students in order to continue the processing of the withdrawal?	*These people should be added to the notification lists (page 4).*
❑	What module initiates the withdrawal process?	*This may influence the delete and notification options.*
❑	Do students become constituents upon enrollment or graduation?	*This determines whether the users will select a constituency for withdrawn students’ new constituent records or change the constituencies of those individuals’ existing constituent records.*

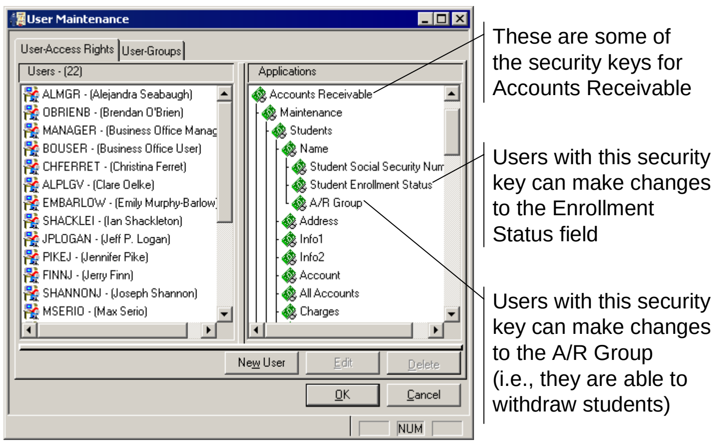
	Decision	Action
❑	Do you want to create/update student and parent information in ALUMNI/DEVELOPMENT when students withdraw or when their classes graduate?	*Set up the new system preference "If you transfer students to AL/Dev. upon graduation, when should withdrawn students become Constituents (I=Immediate, G=Graduation of Classmates)?"*

New Security Keys

After you install the update, you should change users' security keys to make sure that only the users who should be able to withdraw students have the security key.

By default, all users will have access to this security key (because that is the way the system currently functions).

You should check users' access to the Student or A/R Groups in REGISTRAR, DEAN'S OFFICE, PLACEMENT, and ACCOUNTS RECEIVABLE.



Setting up the Withdrawn Student and A/R Groups

Your school can determine what each group indicates: Current Students, Graduates, Withdrawn Students, or None of the Above. When the update is installed, all groups are set to "None of the Above" because that best represents the current functionality. Once your school knows how you will use the new Withdrawal Process, you must set up all of the groups.

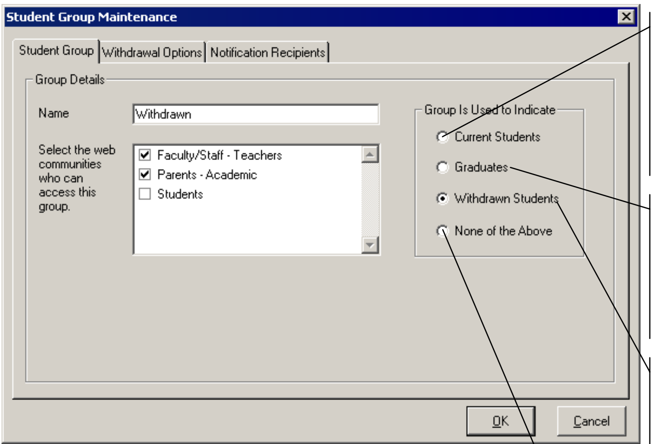
When you define your Withdrawn groups, you need to set up the withdrawal options.

Set Up the Student Groups

Student Group Maintenance in REGISTRAR has been changed to allow your school to set up the withdrawn student options.

Student Group Tab

For your withdrawn-type Student Groups, you will select Withdrawn Students. You also need to indicate your Current Student and Graduate groups. If your school has MY BACKPACK, you would also indicate which communities should be able to access information for withdrawn students.



When the user assigns a Withdrawn-type Student or A/R Group, the system knows that the student has withdrawn. If a user then assigns a Current Student-type group, the system knows that the student has been re-admitted and the appropriate notifications will be sent.

You would choose this option for the groups used to indicate graduated students. After the 90_1 update has been installed, you must have at least one group indicating Graduates before you can run Student Grade Update.

This is the status that you must choose for your Withdrawn groups in order for the new student withdrawal feature to work.

None of the Above groups trigger no action when selected. It would be used for groups like Faculty/Staff, Semester Abroad, Off Roll, etc.

Withdrawal Options Tab

This is where your school sets up the options that will appear by default; when a student is withdrawn, you can make changes as dictated by special circumstances. Place a checkmark in the checkbox of any data that should be deleted from the records of withdrawn students.

This tab is only enabled when the Withdrawn Students option on the Student Group tab is selected.

These options indicate what information to delete by default when students withdraw

Remove students from advisor's roster

Remove students from homeroom roster

Remove students' dorm room assignment

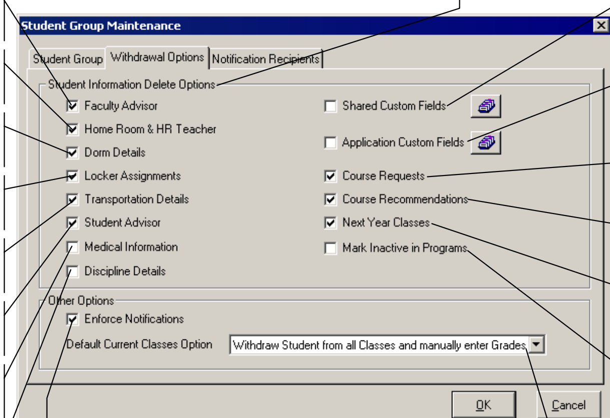
Delete students' locker assignment

Delete students' transportation data

Remove students' peer advisor assignment

Delete students' medical information

Delete students' discipline history



Delete some or all of the shared custom field data

Delete some or all of the module's custom fields

Delete students' course requests

Delete students' recommendations

Remove students from Next Year classes

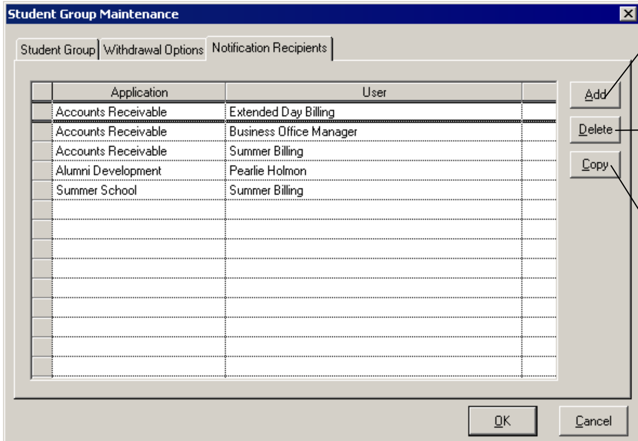
Mark students as inactive and create leave dates in Program Maintenance

Select this option if you want to force a notification of other users when a student is withdrawn (see the Notification step of the Withdrawal Wizard descriptions for more information)

Use this drop-down list to indicate what action should be performed on student class information

Notification Recipients Tab

The default recipients are established on this tab. In general, this list would include the people who must perform the next steps in the overall student withdrawal process or should be notified of withdrawn students. (Please note that users of most modules can subscribe to notifications; see page 7.)



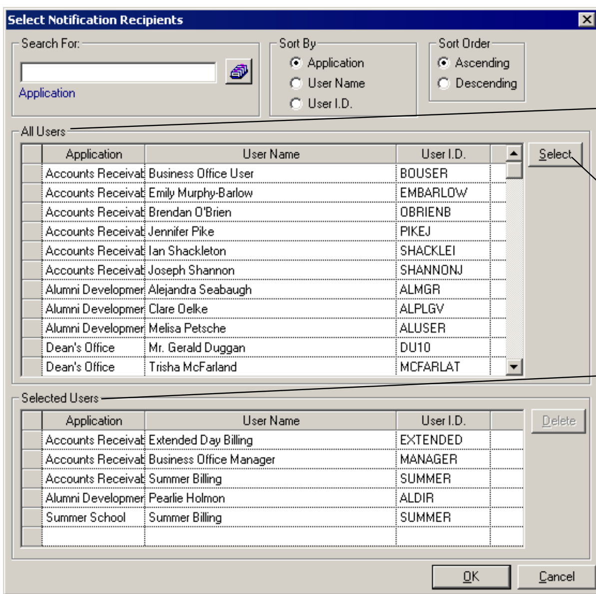
Click this button to add a recipient; you choose users from the Select Notification Recipients dialog.

To remove a user from the default notification list, highlight the row and then click this button

You can copy the list of recipients from another group; this saves you from re-entering the same or similar list of recipients

Notifications are sent to users by module. If a user has access to multiple modules, you would either select their ID for all modules or only for the relevant module. For example, if a user can access Accounts Receivable and Summer School but is only responsible for withdrawing a student from Summer School, you would select the ID associated with that module.

To add a recipient, click the **Add** button. Select the users from the All Users list who should be added to the Selected Users list.



Users who have not been selected as recipients

Click this button to add the highlighted user(s) to the Selected Users List

Users who will be included as notification recipients by default; changes can be made when a student is withdrawn

Remember that this is simply the default list of recipients; users are able to select or remove recipients as necessary when they withdraw a student. If “Enforce Notifications” was selected on the Withdrawal Options tab, certain module users must be notified when a student is withdrawn (pages 10, 13 and 15), so you may want to select users of those modules as default recipients.

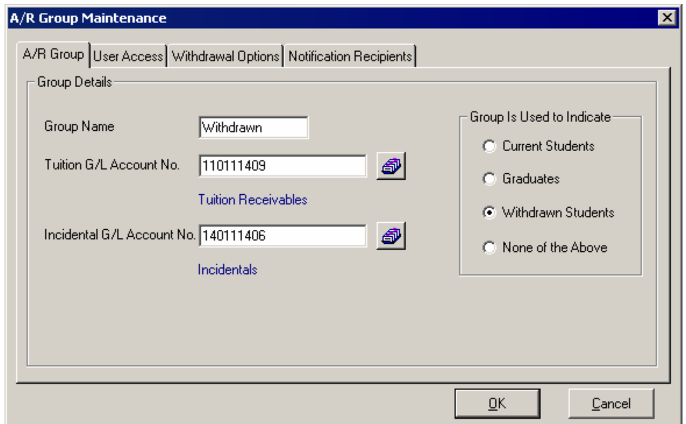
Users will only receive notifications for divisions they can access, if your school has defined division-level security. For example, if a user is only assigned to Upper School, they will not receive notifications for Middle School student withdrawals (even if your school uses the same Student Group for all divisions).

Set Up the A/R Groups

A/R Group Maintenance in ACCOUNTS RECEIVABLE has been changed to allow your school to set up the withdrawn student options.

A/R Group Tab

The A/R Group tab now has the Group Is Used to Indicate radio buttons. The User Access tab is, of course, still available (see the *Senior Accounts Receivable System Reference Guide*).

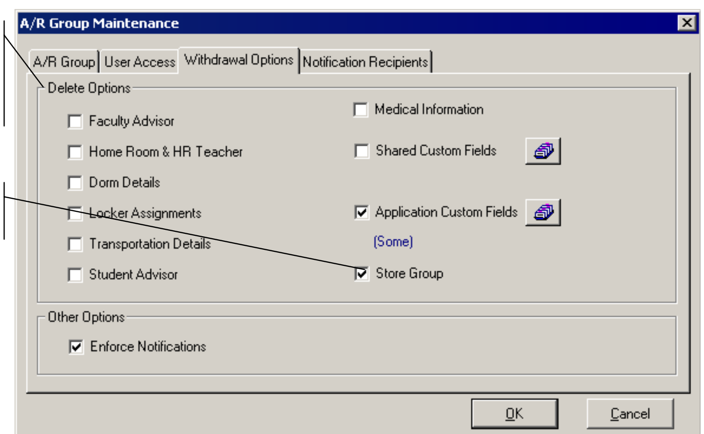


Withdrawal Options Tab

There are fewer withdrawal options in A/R Group Maintenance because course-related information is not stored in ACCOUNTS RECEIVABLE.

These options indicate what data to delete by default; you do not necessarily need to select data if they will be deleted by the Registrar withdrawal

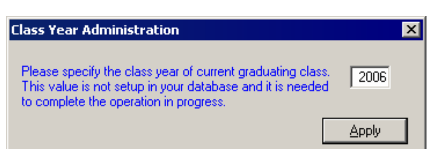
You can delete the Store Group if your school uses Campus Store for Windows



Class Year Administration

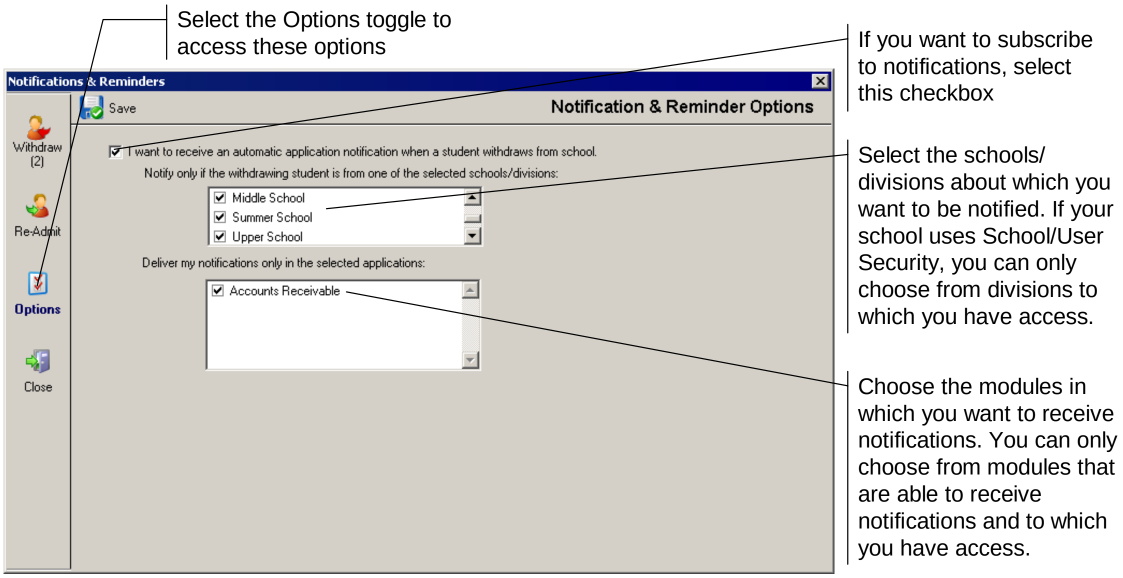
When you first save the Student or A/R Group with the options selected, you will be asked the one-time question, “Please specify the class year of the current graduating class.”

You will not have to answer this question again after you enter the information. Be sure to enter the correct graduation year.



Subscriptions

There are **Notification Options** where users can decide that they want to see withdrawals for certain schools and in certain modules. The schools/divisions and SENIOR SYSTEMS modules that are available to users are determined by user security. To access this screen, users can click the **Notifications** button or open the **Maintenance** menu and then select Notifications.



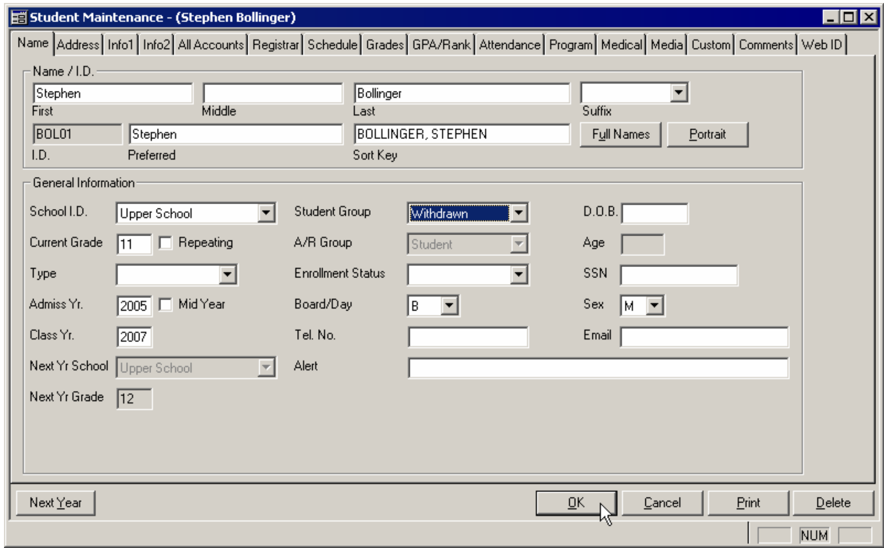
When students withdraw from the selected schools/divisions, the user will receive a notification in the selected SENIOR SYSTEMS modules, whether or not they are selected in the Notification Recipient list. This enables users to stay "in the loop," even if they do not need to perform any actions in the withdrawal process. (Users selected in the recipient list who also have subscriptions will not receive duplicate notifications.)

Withdrawing Students

As before, the student withdrawal process begins when you change the Student (or A/R) Group and save the student record.

You can withdraw a student from This Year or Next Year. The process is similar; in our example, we are withdrawing the student from This Year.

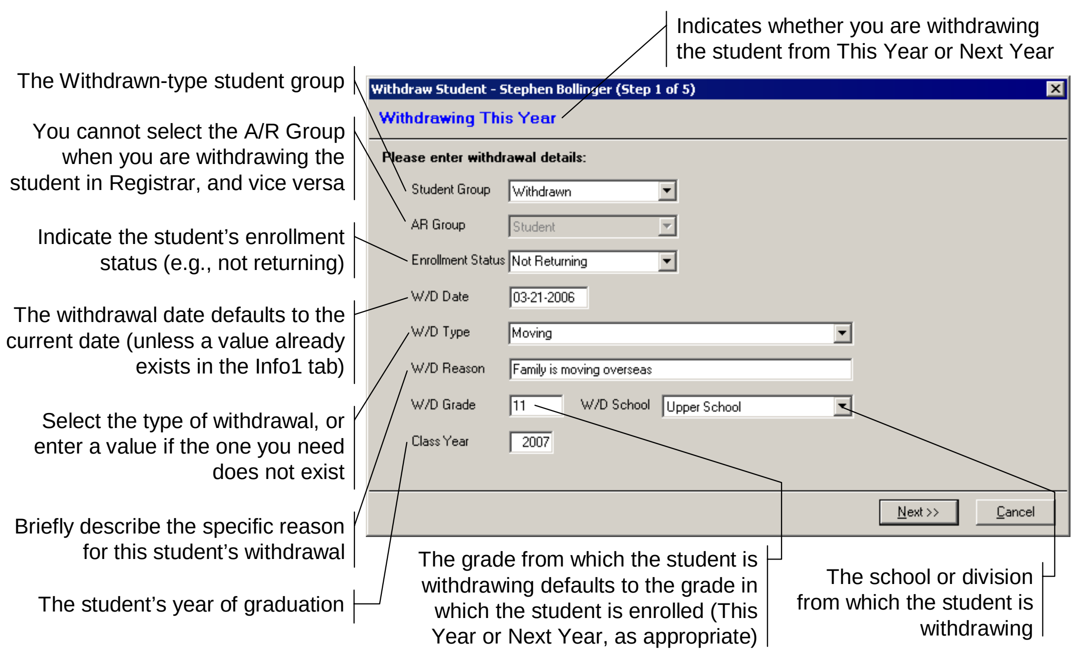
These examples assume that the withdrawal process begins in Registrar. The differences between this and a process that begins in Accounts Receivable are minimal. Your school may want to decide on an appropriate business practice.



Withdrawn Student Process in Registrar

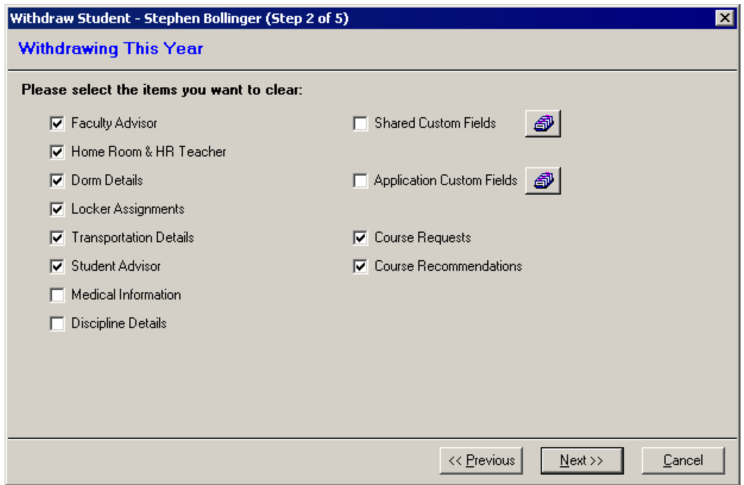
Step 1: Withdrawal details

In the first screen, you will enter the withdrawal details. Default information comes from the student's record (W/D Grade, W/D School, etc.). You can make changes for this particular withdrawing student as well as enter other details (W/D Type, W/D Reason, etc.). The details entered in this screen are saved on the student's Info1 tab.



Step 2: Items to clear

In the second step of the withdrawal process, you indicate what data should be permanently removed from the student record. The default options were selected in Student Group Maintenance on the Withdrawal Options tab (page 4). You can make changes as appropriate for the student's particular circumstances.



Step 3: Withdrawing from programs and classes

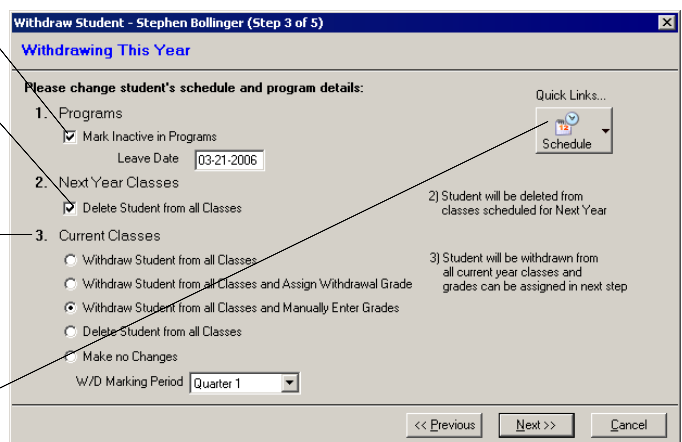
In step 3, you will decide what happens to the student's schedule. The options in this screen are based on the selection in the Current Classes Option drop-down list in Student Group Maintenance (page 4).

Selecting this option marks the student as inactive with the leave date you specify

When you select this option, the student will be removed from the rosters for any classes in which they are scheduled for the next academic year

The option you choose in this area determines what options you see in this step and what you will need to do in the next step of the withdrawal process (see the following table)

You can use this button to access This Year and Next Year schedule information, where you can make changes manually to each class

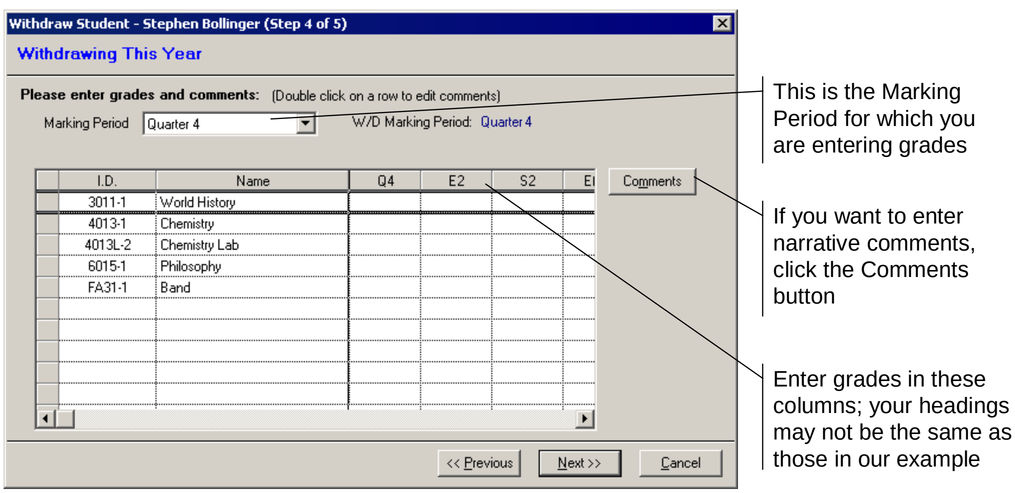


If you choose to Delete Student from all Classes and the student has grades or comments for the classes that will be deleted, the system will inform you that this information is going to be deleted if you proceed with that option.

Current Classes Option	W/D Marking Period	Grade Entry Period	Grade	Next Step
Withdraw Student from all Classes	✓			Step 5: Notification
Withdraw Student from all Classes and Assign Withdrawal Grades		✓	✓	Step 5: Notification
Withdraw Student from all Classes and Manually Enter Grades	✓			Step 4: Enter grades and narrative comments
Delete Student from all Classes				Step 5: Notification
Make no Changes				Step 5: Notification

Step 4: Enter grades and comments

This step is only applicable if you selected the "Withdraw Student from all Classes and Manually Enter Grades" radio button under Current Classes in the previous step. Otherwise, you will proceed directly to Step 5: Notification.



Step 5: Notification

In this tab, you can add and remove recipients from the notification list. You can add or remove users regardless of whether or not the Enforce Notification checkbox was selected in Student Maintenance (page 4). If that option was selected, at least one person must be notified in appropriate modules.

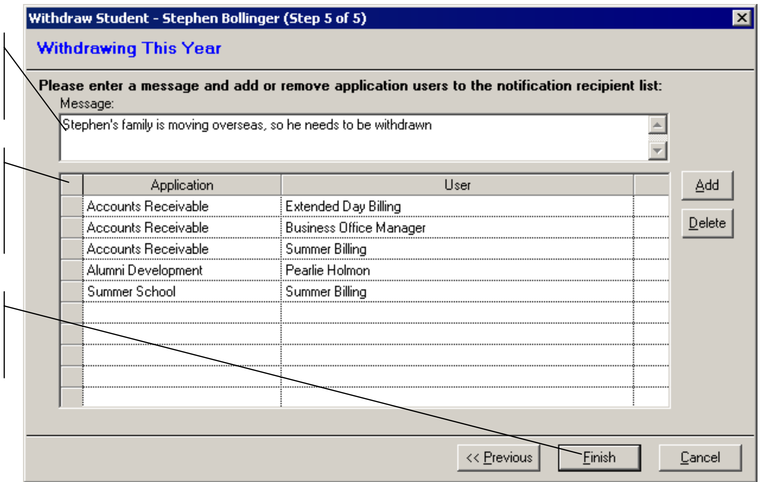
- If your school has BUSINESS OFFICE installed and you withdraw the student from REGISTRAR, you must select at least one ACCOUNTS RECEIVABLE user.
- If you do not have BUSINESS OFFICE but you do have ALUMNI/DEVELOPMENT, you will be forced to notify a user of that module.
- If a FINANCIAL AID record exists for the student, you must notify a user in that module.
- If your school has SCHEDULING and you do not delete course recommendations or requests for next year classes when they exist, you must notify a SCHEDULING user.

- If your school has ENROLLMENT MANAGEMENT, the REGISTRAR user must notify one of those users unless the withdrawal is being performed based on an ACCOUNTS RECEIVABLE notification.
- Teachers are always notified if a student on one of their rosters (advisor, homeroom, class, etc.) is withdrawn.

You can enter a message that will appear for the notification recipients

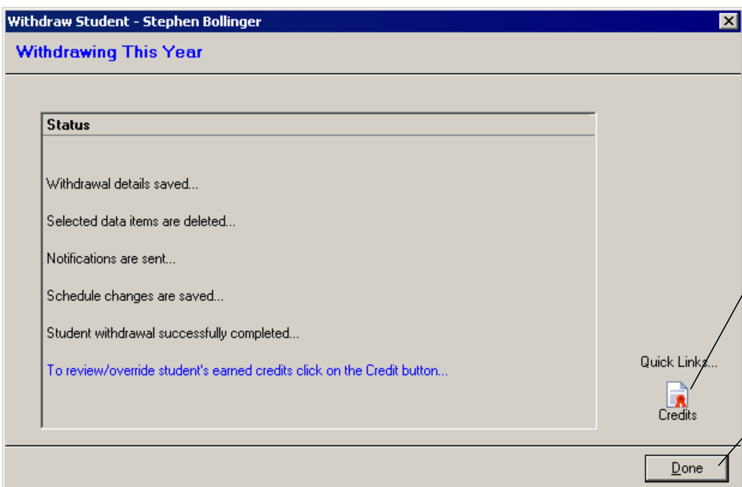
The recipients default from the Notification Recipients tab in Student Group Maintenance

Click the Finish button to perform the Withdrawal process



Withdrawal process complete

The final screen in the Withdrawal Wizard displays the status of the withdrawal. When it is complete, you should see the screen shown in our example.

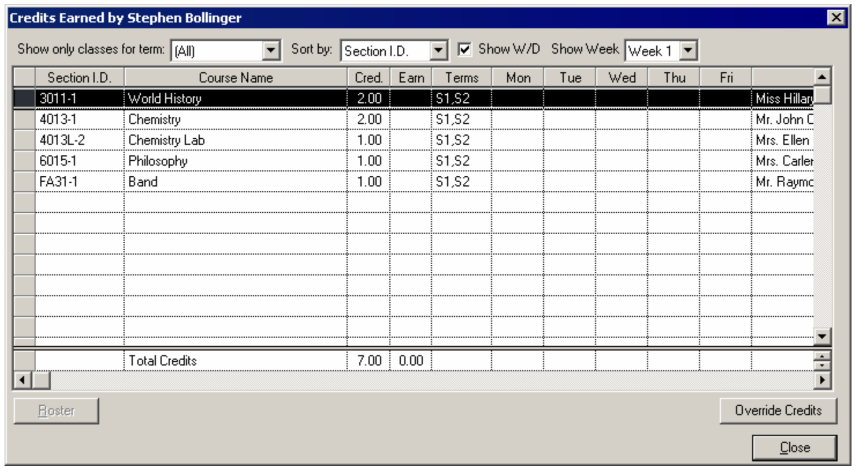


To view or edit the student's earned credits, click this button

Click this button when you are finished

Credits Earned

To make changes to the student's earned credits, highlight the class row and then click the **Override Credits** button.

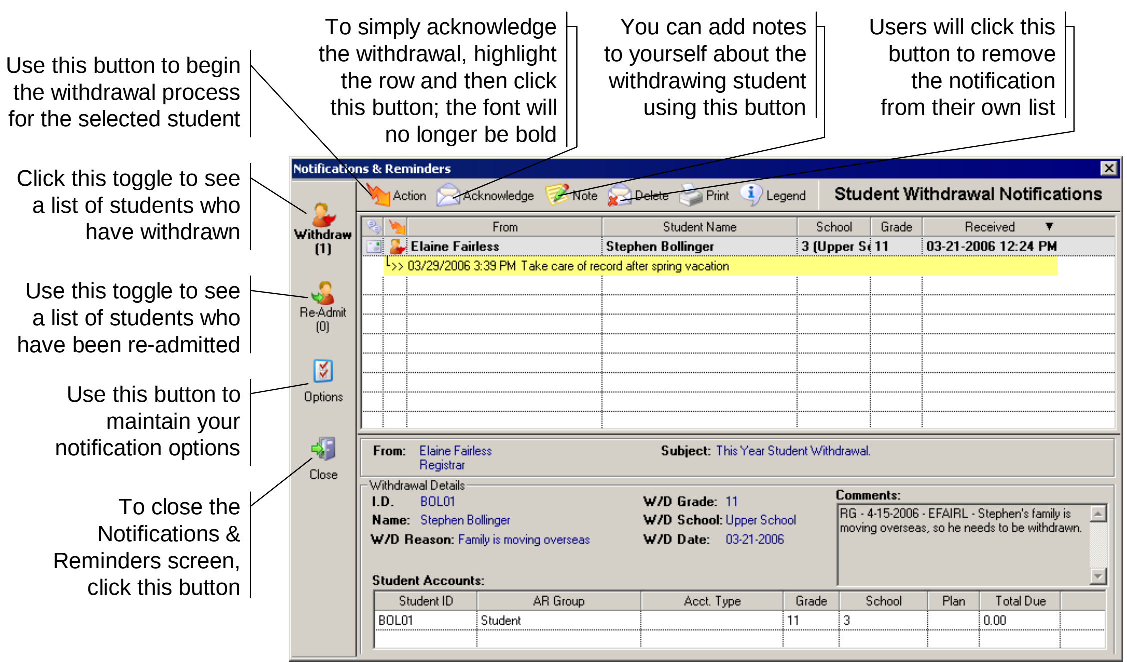


Withdrawal Process in Accounts Receivable

In our example, the Registrar Office has processed the student's withdrawal and other users have been notified. When those users log in to SENIOR SYSTEMS and new information exists, they will see the notification screen.

Notification Screen

This screen opens automatically when the user logs in to SENIOR SYSTEMS if there are unacknowledged withdrawal notices. All notifications can be viewed at any time by using the **Notifications** button on the toolbar.



Notifications that have not been acknowledged, read or withdrawn are shown in bold text and the far left-hand column displays the unacknowledged icon. Once you act upon or simply acknowledge a notification, that icon changes to acknowledged and the text is no longer bold. Notifications will appear in the list until they are deleted.

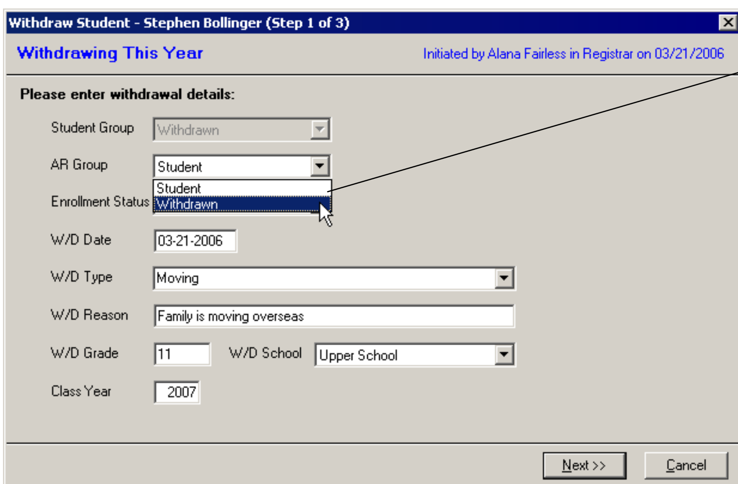
Icon	Definition
	User has not acknowledged or acted upon the withdrawn student notification
	Notification has been acknowledged or acted upon
	A note exists for the student
	Student has withdrawn
	Student has been re-admitted

In our example, the ACCOUNTS RECEIVABLE user would highlight the student row and then click the **Action** button , opening the Withdrawal Wizard. (Users who have only been notified and cannot perform an action will not see the Action column or the Action button. Their ability to withdraw students is determined by the security keys for the Student or A/R Groups on the Student Maintenance Name tab; see page 3)

Step 1: Withdrawal details

In our example, the ACCOUNTS RECEIVABLE user does not need to enter anything in the first step except for the AR Group. The other information was entered by the REGISTRAR user who initiated the withdrawal process.

You must select a Withdrawn-type group.



You would select the withdrawn A/R Group. You can select a Withdraw-type A/R Group even if you have not been granted access to that group.

Step 2: Items to clear

In the second step of the withdrawal process, you indicate what data should be permanently removed from the student record. The default options were selected in A/R Group Maintenance on the Withdrawal Options tab (page 6). You can make changes as appropriate for the student's particular circumstances. (In our example, some of the information was already deleted by REGISTRAR.)

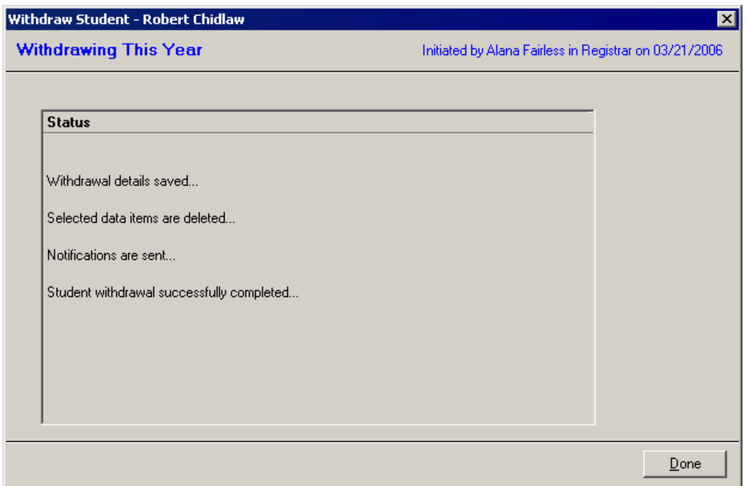
Step 3: Notification

In this tab, you can add and remove recipients from the notification list. You can add or remove users regardless of whether or not the Enforce Notification checkbox was selected in A/R Group Maintenance (page 6). If that option was selected, however, you need to notify at least one person in each of the appropriate modules.

- If your school has REGISTRAR installed and you initiated the withdrawal from ACCOUNTS RECEIVABLE, you must select at least one REGISTRAR user.
- When you are withdrawing the student based on a notification from REGISTRAR, you will need to notify an ALUMNI/DEVELOPMENT user. If you do not have REGISTRAR but you do have ALUMNI/DEVELOPMENT, you will also be forced to notify a user of that module.
- If a FINANCIAL AID record exists for the student, you must notify a user in that module unless the withdrawal is being performed based on a REGISTRAR notification.
- If your school has ENROLLMENT MANAGEMENT, you must notify one of those users.

Withdrawal process complete

The final screen in the Withdrawal Wizard displays the status of the withdrawal. When it is complete, you should see the screen shown in our example.

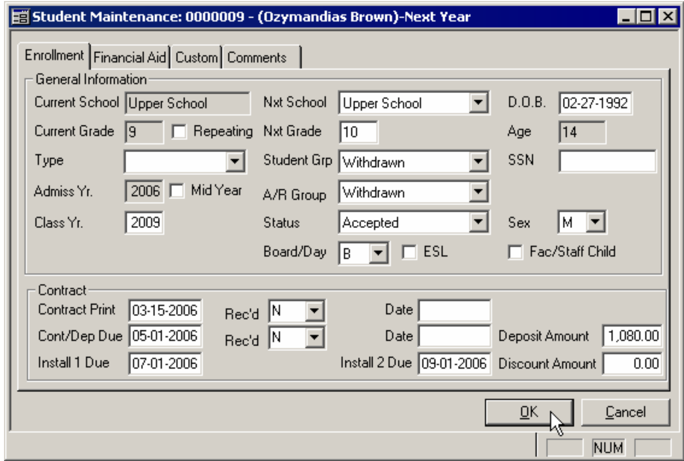


Enrollment Management

Your school may initiate a withdrawal from the current or next year using the ENROLLMENT MANAGEMENT module. In this example, we will go through the steps of withdrawing a student from the next year.

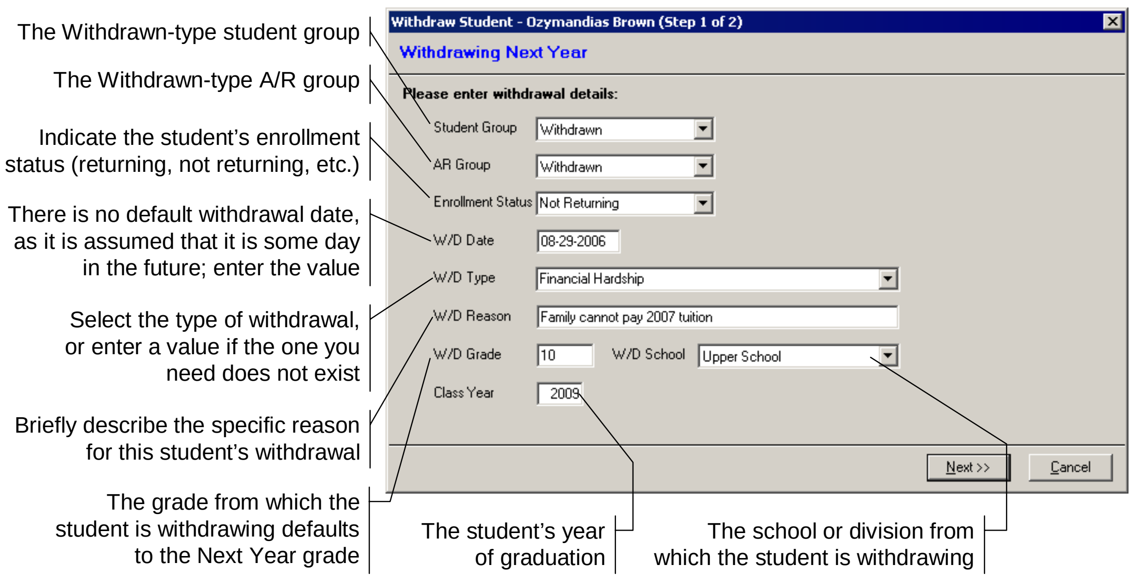
Withdrawing the student

In Student Maintenance, you would change the Student and A/R Group to Withdrawn (or your school's equivalent). When you click the **OK** button to save the record, the Withdrawal Wizard will open.



Step 1: Withdrawal details

In step 1, you would enter the withdrawal details for future reference.



Step 2: Notification

The suggested list of recipients is a combination of the values for the Student and A/R Groups. Users will receive only one notification per module, even if they are listed in both groups; duplicate messages are not sent.

The ACCOUNTS RECEIVABLE and REGISTRAR users would go through the Withdrawal Wizards in their respective modules. The REGISTRAR process is shorter than described on page 8 when the student is not enrolled in classes for the next year.

Withdrawal process complete

When the student has been withdrawn you will see the withdrawal status, stating that the details have been saved, notifications have been sent, and the student has been successfully withdrawn. REGISTRAR and ACCOUNTS RECEIVABLE users will be prompted to go through the Withdrawal Wizard to clear information from Student Maintenance fields, etc.

Withdrawing Families from Alumni/Development

The withdrawal process is different in ALUMNI/DEVELOPMENT, performed as a batch for all withdrawn students, their parents and grandparents. The process will vary between organizations, depending on how your school has decided to handle constituents.

Preferences

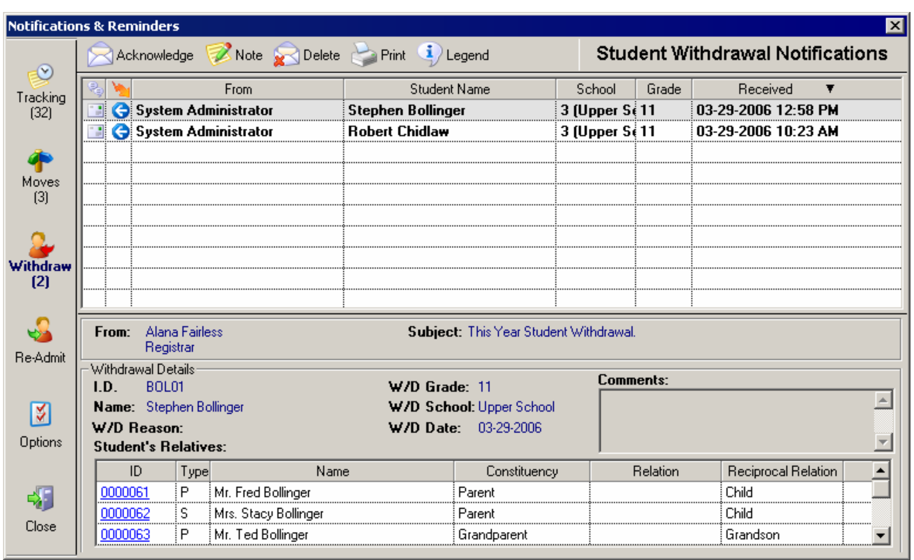
There is a new system preference: "If you transfer students to AL/Dev. upon graduation, when should withdrawn students become Constituents (I=Immediate, G=Graduation of Classmates)?"

- If this preference is set to **I**, students who withdraw this year will appear in the Withdrawn Families list to be created as constituent records as soon as the withdrawal process is complete.
- If it is set to **G**, withdrawn students will not appear in the list until their classmates graduate.
- In either case, only students withdrawing from This Year are added to the Withdrawn Families list. If a student is withdrawn from Next Year, they do not appear in the list until after your school runs the Student Grade Update.

This only applies if your school does not create constituent records for students upon enrollment (determined by the system preference "Should student information be transferred to Alumni/Development when the student is enrolled?"). If your school does create constituent records when students enroll, you would use the withdrawal process to change the withdrawn students' constituencies.

Alumni/Development Notification

If there is a withdrawn student, the appropriate ALUMNI/DEVELOPMENT users will see the notification window. This only notifies the user of the withdrawals. The actual withdrawal process for constituents is found in the Withdrawn Families feature, accessed through the Maintenance menu.



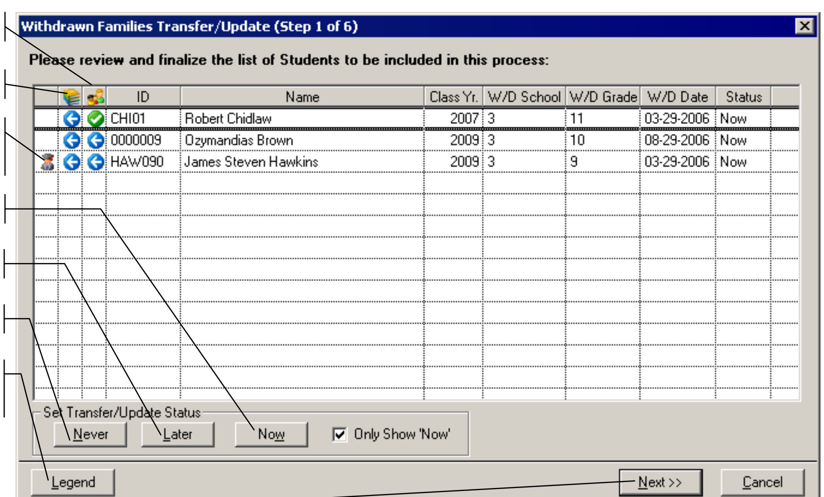
Icon	Definition
	Update is pending
	Student constituent data will be updated upon graduation of class
	Update is complete
	Student constituent record already exists

Withdrawn Families Process in Alumni/Development

Once students have been fully withdrawn from BUSINESS OFFICE and/or REGISTRAR, they are pulled into the process list based on your school's system preferences. (Students may have constituent records if parents gave in the name of their child.)

- When students transfer to ALUMNI/DEVELOPMENT, the system will create a new constituent record using the information entered in the Withdrawn Families Transfer/Update wizard. This includes defining a Constituency and defining the reciprocal relationships (because they are now Constituent relationships, not Student).
- When the parents are updated, the system will check to see if parents have any current students in the system at Student Grade Update. (The system looks at the relationships, Family ID, and entity number, which tie into the STUDENT table.) If there are no current students, the constituency will change to Past Parent (or Past Grandparent). Parents will be changed to Past Parent even if the student is set to Never.
- If student information transfers to ALUMNI/DEVELOPMENT upon enrollment, the student's constituent information can be updated through this feature. (This step involves setting the Graduation flag, Year Left, and Primary Constituency.)

Step 1: Select students to update

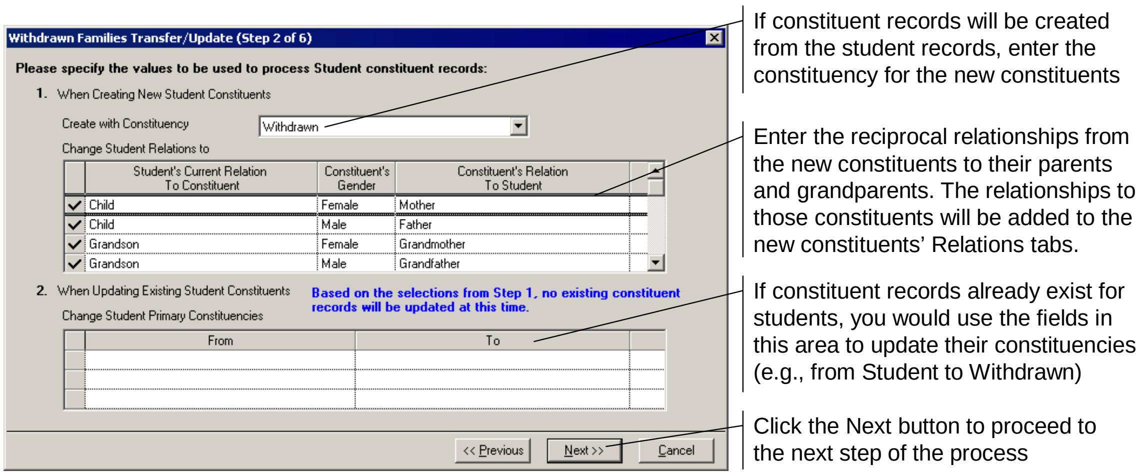


- Parent information is updated when the Status is set to Now. It can be updated independent of the student (if your organizations updates the records when their classes graduate).
- If students will update at the time their class graduates, their status is set to Later and cannot be prematurely changed to Now. When the class graduates (as processed by Student Grade Update), the students' status changes to Now.
- If the student status is set to Never, then a constituent record will not be created. The information for the students' relatives' records can still be processed.
- If a student already has a constituent record, users cannot accidentally add another one. The status also cannot be changed to Never; users will be prompted to update the students' constituencies.

Step 2: Relationships

In this step, you create Student Relationships to parents and grandparents, and define the Student Constituents' constituency for new constituent records.

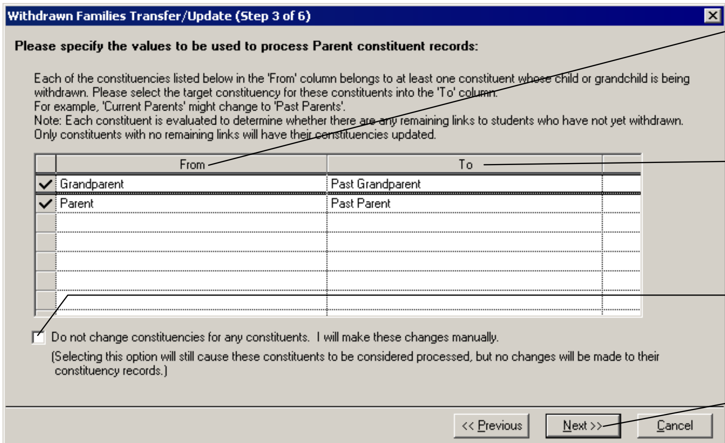
Students who already have a Constituent record have a primary constituency, and you can change it in this screen (e.g., Current Student to W/D Student).



Step 3: Update parent and grandparent constituencies

You change the constituencies of constituents related to the students who have withdrawn. The system changes primary and non-primary constituencies.

You cannot add constituencies from this screen. Schools who keep a backlog of constituencies will want to place a checkmark in the checkbox under the table and then use the final report to update the records of those constituents.



These are the current constituencies of parent and grandparent records (e.g., Current Parent)

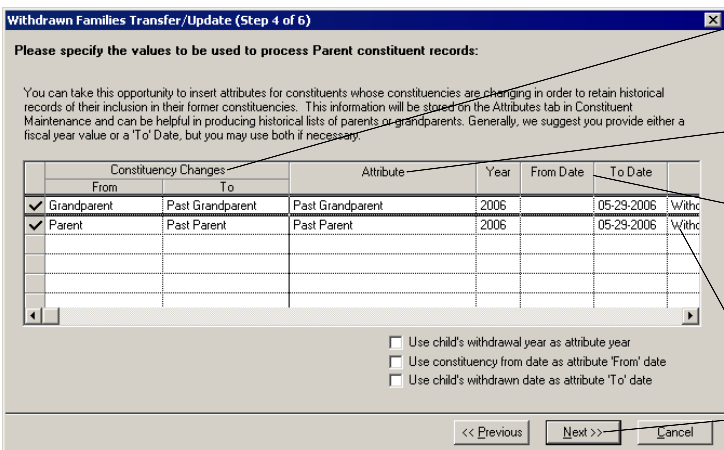
Select the constituency to which the parent and grandparent constituencies should be changed (e.g., Past Parent)

If you want to make the constituencies changes manually, select this checkbox

Click this button to proceed to the next step of the process

Step 4: Add attributes to parents and grandparents

If there are parents and grandparents whose constituencies will change, you can add Constituent Attributes to their records.



These columns display the constituency changes you specified in the previous step

Select the attributes to be added to the related records

You can enter the dates to be used on the attributes in these columns or use the checkboxes to populate the dates based on the student's withdrawal data

In the final column, you can enter explanations for the attributes

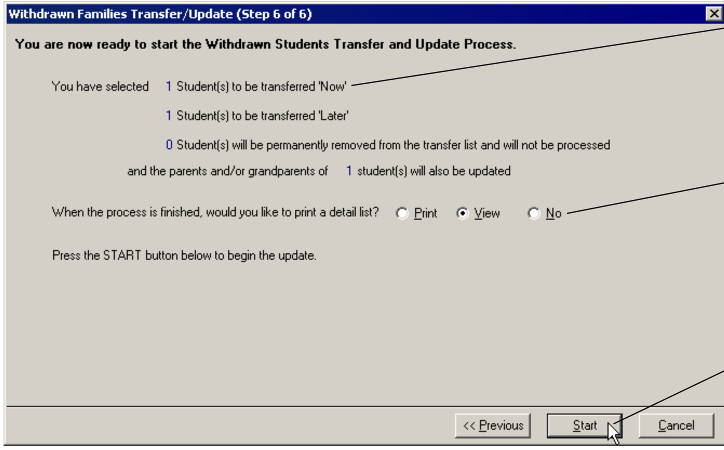
Click this button to proceed to the next step of the process

Step 5: New web user records

If your school has MY BACKPACK installed, you can update the available Communities for the Web User accounts.

Step 6: Review counts and process withdrawals

Review the counts in this screen to make sure that they match your estimates. When you are ready, choose to print, view or skip the report of changed records and then click the **Start** button.



These fields display the counts of records that will (or will not) be affected by the Withdrawn Families process

Determine whether you want to view/print a report of the updated constituent information

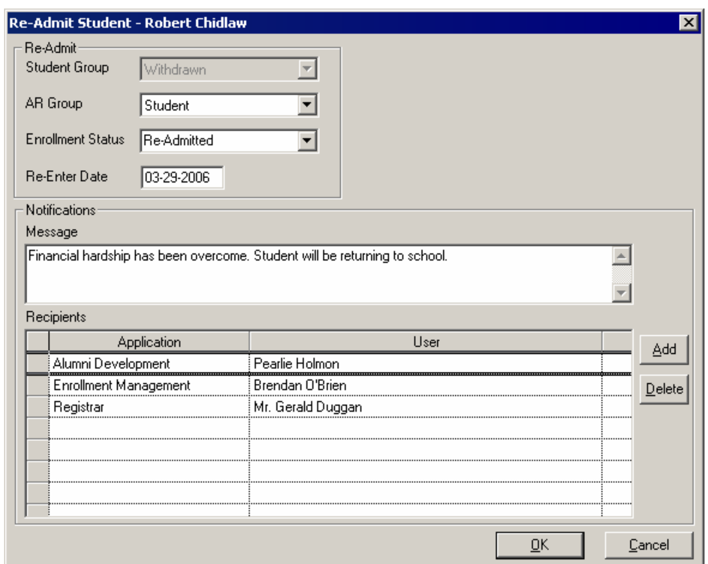
Click the Start button make the changes to the student and parent records

Withdrawal Process Complete

When the process is complete, you should see a screen that informs you of the number of changes that were made in the system.

Re-admitting Students

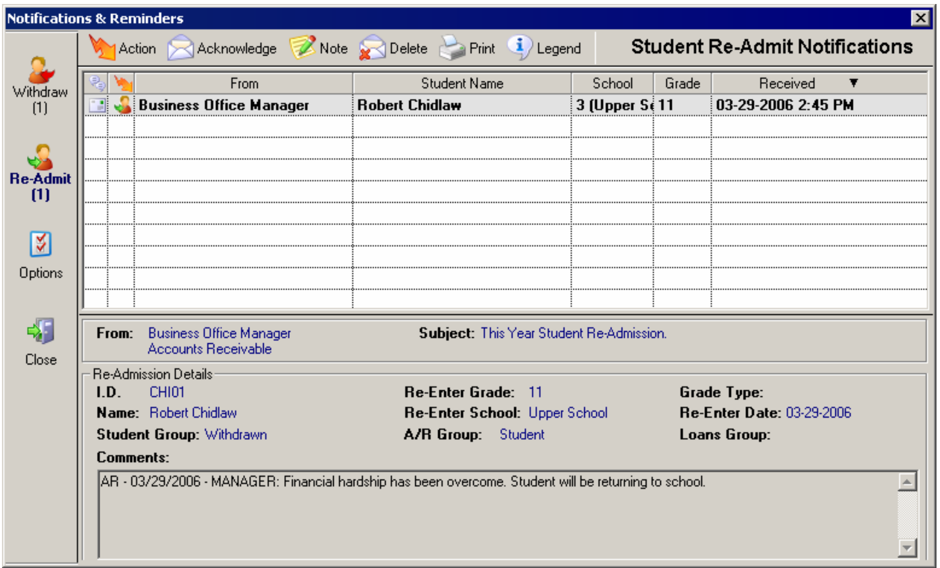
When a user assigns a Withdrawn-type Student or A/R Group, the system knows that the student has withdrawn. If someone then assigns a Current Student-type group, the system knows that the student has been re-admitted and the appropriate notifications will be sent.



Notifications are sent to the selected recipients. The default list of recipients is pulled from Student or A/R Group Maintenance for the Current Student-type you selected. Anyone who received a notification of the withdrawal will also be notified as follows:

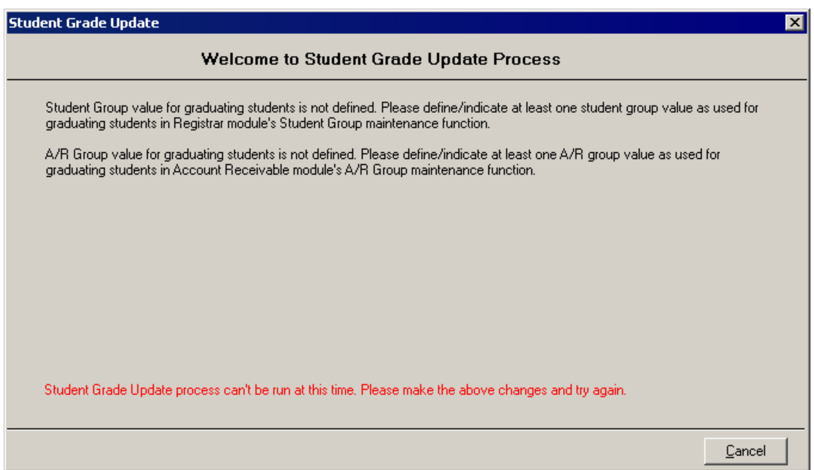
- Users who acknowledged the withdrawal notification (both notification recipients and subscribers) will be notified of the re-admittance. If these acknowledged notices are still in the Notification list, they are not deleted.

- For users who have not yet acknowledged the withdrawal notification, the withdrawal notification is automatically deleted from their notification list. If they were on the list of recipients for the re-admit notification, they will receive that notice.
- Teachers are always notified if a student on one of their rosters (advisor, homeroom, class, etc.) is re-admitted.



Student Grade Update

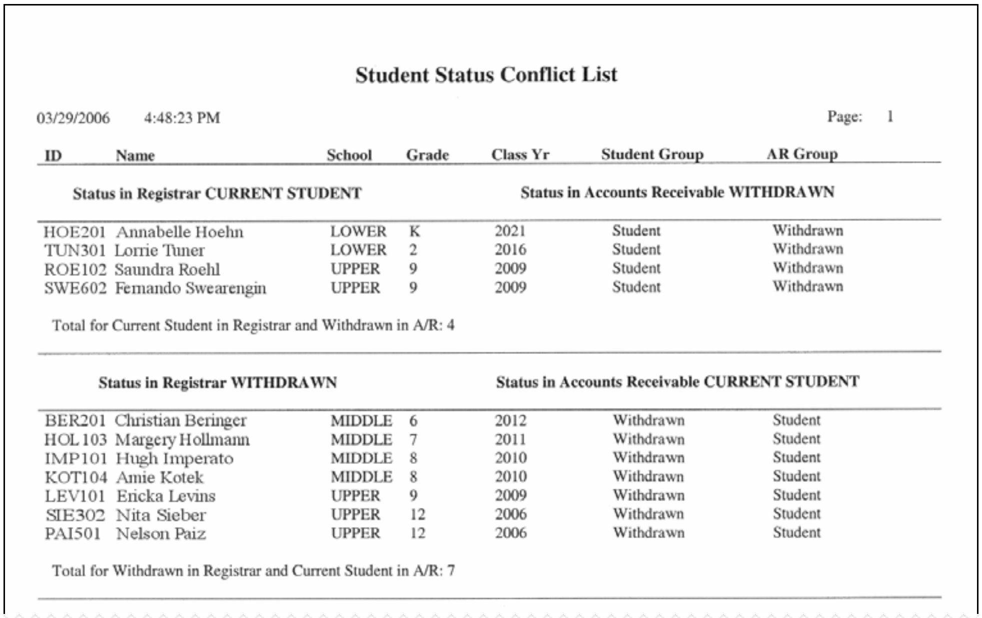
After installing the 90_1 update, you will not be able to run the Student Grade Update if there are no Student or A/R Groups defined as Graduating. You will instead see a message like the one shown below.



Also, before you can proceed with the Student Grade Update, you must run the End-of-Year Updates for in all other SENIOR SYSTEMS modules.

Student Status Conflict List

Before you begin the Student Grade Update, you should print the report offered in the first screen. This allows you to see a list of students whose Student and A/R Group values do not match.



Student Status Conflict List

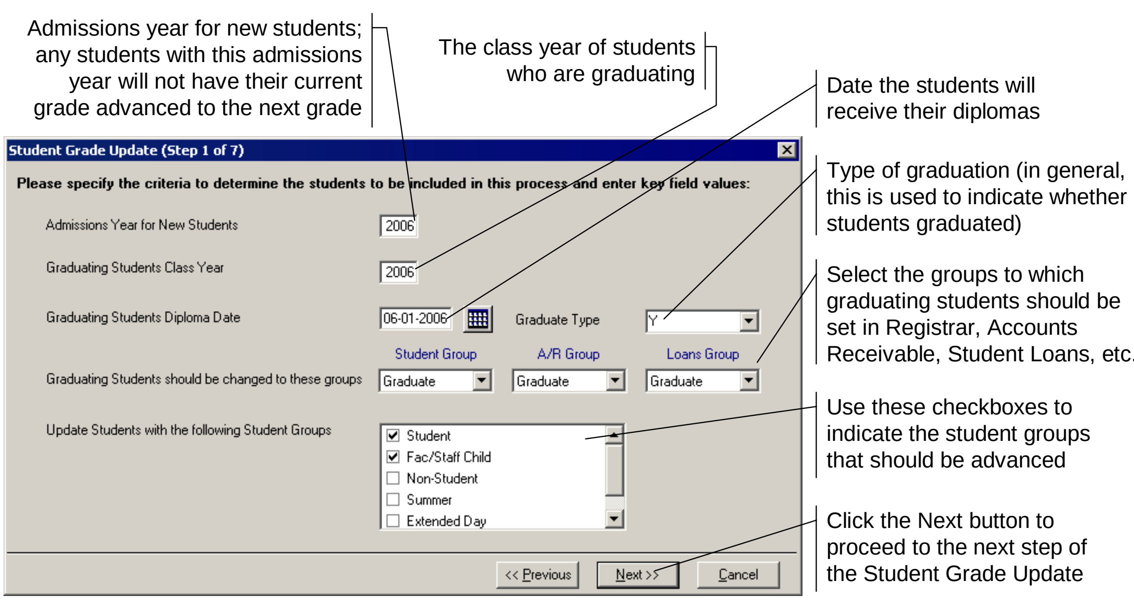
03/29/2006 4:48:23 PM Page: 1

ID	Name	School	Grade	Class Yr	Student Group	AR Group
Status in Registrar CURRENT STUDENT				**Status in Accounts Receivable WITHDRAWN**		
HOE201	Annabelle Hoehn	LOWER	K	2021	Student	Withdrawn
TUN301	Lorrie Tuner	LOWER	2	2016	Student	Withdrawn
ROE102	Saundra Roehl	UPPER	9	2009	Student	Withdrawn
SWE602	Fernando Swearengin	UPPER	9	2009	Student	Withdrawn
Total for Current Student in Registrar and Withdrawn in A/R: 4						
Status in Registrar WITHDRAWN				**Status in Accounts Receivable CURRENT STUDENT**		
BER201	Christian Beringer	MIDDLE	6	2012	Withdrawn	Student
HOL103	Margery Hollmann	MIDDLE	7	2011	Withdrawn	Student
IMP101	Hugh Imperato	MIDDLE	8	2010	Withdrawn	Student
KOT104	Amie Kotek	MIDDLE	8	2010	Withdrawn	Student
LEV101	Ericka Levins	UPPER	9	2009	Withdrawn	Student
SIE302	Nita Sieber	UPPER	12	2006	Withdrawn	Student
PAI501	Nelson Paiz	UPPER	12	2006	Withdrawn	Student
Total for Withdrawn in Registrar and Current Student in A/R: 7						

Before proceeding with the Student Grade Update, you should make the necessary corrections to these student records.

Step 1: Graduate information

In the first screen, enter the information for graduating students. The Diploma Date and Graduate Type do not overwrite any values that already exist in student records (e.g., students who graduated early).



You cannot proceed to the next step if you have not run the End-of-Year updates in all of the appropriate modules; you will be notified of the updates that need to be performed if you attempt to proceed.

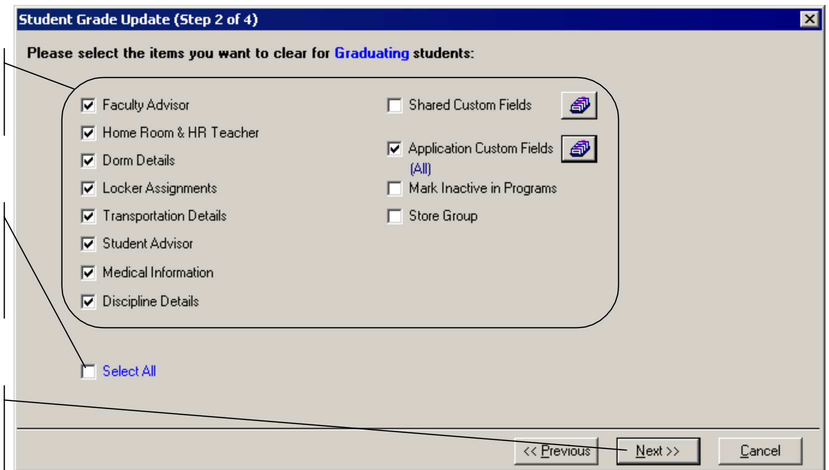
Step 2: Delete graduating student data

In the second step, you can choose to remove data from graduating student records.

Use these checkboxes to delete the data from all graduated student records

To place a checkmark in all of the checkboxes, select this checkbox. You can then clear any checkboxes you need to.

Click the Next button to proceed to the next step of the Student Grade Update



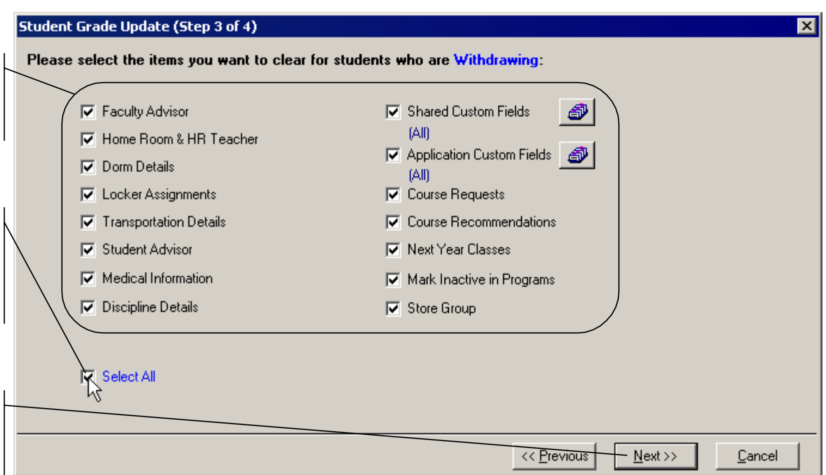
Step 3: Delete withdrawing student data

You can delete student data from the records of students who are withdrawing at the end of the year. (This does not affect information in records that have already been through the withdrawal process, so you can ensure that deliberately preserved data will remain in the database.)

Use these checkboxes to delete the data from all withdrawn student records

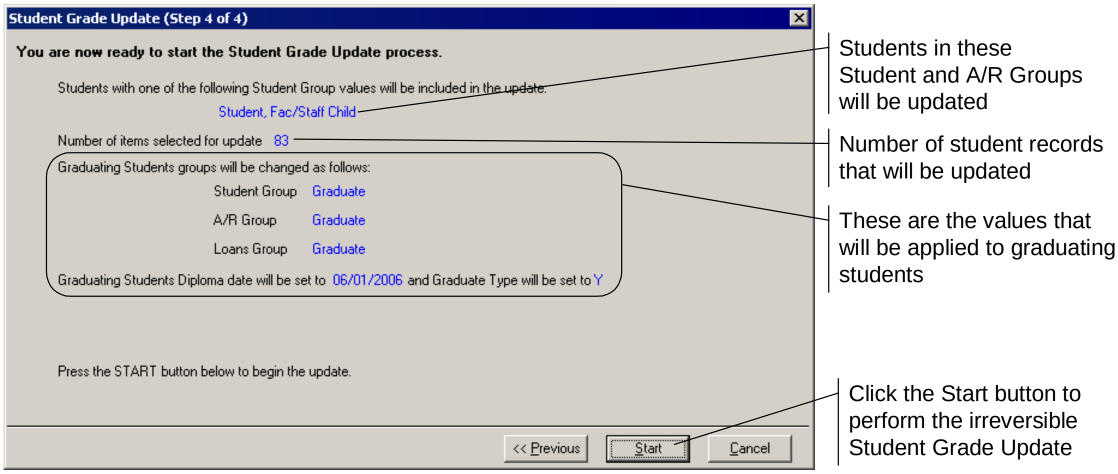
To place a checkmark in all of the checkboxes, select this checkbox. You can then clear any checkboxes you need to.

Click the Next button to proceed to the next step of the Student Grade Update



Step 4: Overview of changes to be made

Before you proceed with the Student Grade Update, you can use this screen to make sure that the data match your estimations of what should be updated. If the information does not look correct, go back and review the data in your database before continuing.

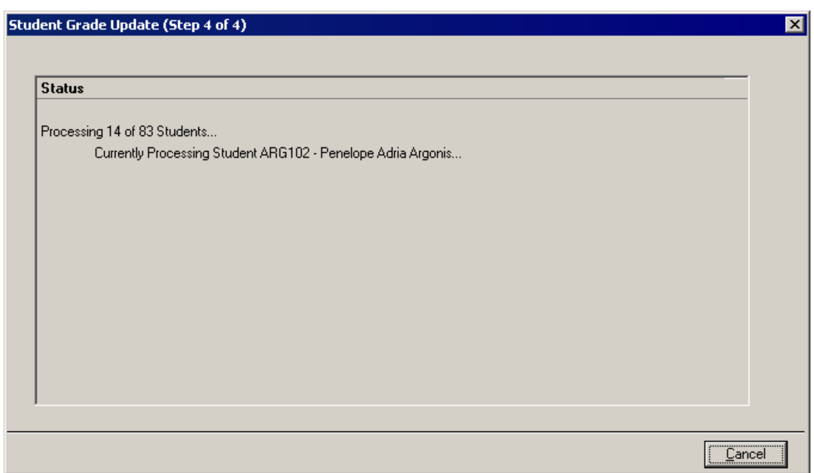


Updating the Students

The Status will display the IDs and student names of the records as they are processed.

When the process is complete, the status will read, “Grade Update successfully completed.” Click the **Done** button.

If for some reason you attempt to run the process again for this year, you will be informed that the process has already promoted students and that those records will not be updated again.



Rules

The following tables show in detail the rules for withdrawal notifications. Keep in mind that these are only enforced if you selected Enforce Notifications in Student and A/R Group Maintenance, as applicable. Obviously, the system does not enforce notifications to modules your school has not installed.

Midyear (i.e., This Year) withdrawal:

W/D MODULE	CURRENT STATUS		NOTIFICATION RECIPIENTS BY APPLICATION								
	STUDENT GROUP	A/R GROUP	RG	AR	AL	EM	FA	SC	SS	AD	SL
RG, DN, PL	Student	Student	Y	Y	4	6	4	Y	N	Y	N
AR	Student	Student	Y	Y	5	6	1	N	2	Y	7
RG, DN, PL	Student	Withdrawn	Y	N	Y	N	N	Y	N	Y	N
AR	Withdrawn	Student	N	Y	Y	N	1	N	2	Y	7
EM	Student	Student	3	3	N	N	N	N	N	N	N
SS	Student	Student	N	2	N	N	N	N	Y	N	N

Conditions

Y: Yes, enforced

N: No, not enforced

1: If the withdrawing student has a financial aid record in current or future aid years

2: If the withdrawing student's A/R account is set as a Bill To account (self or other) in for SUMMER SCHOOL with current transactions

3: Withdrawal process in ENROLLMENT MANAGEMENT works different from other modules. In EM, when the user withdraws a student, the system will send notifications to A/R and RG module users and will not provide other options. Notification recipients in A/R and RG will initiate their module-specific withdrawal process to complete the student's withdrawal.

4: If A/R is installed then No, otherwise Yes. For FINANCIAL AID, include condition **1**.

5: If RG is installed then No, otherwise Yes

6: Yes if A/R or RG initiates the withdrawal. No if A/R or RG withdraws the student based on notification sent by EM

7: If the withdrawing student has a STUDENT LOAN record

Next Year withdrawal:

W/D MODULE	CURRENT STATUS		NOTIFICATION RECIPIENTS BY APPLICATION								
	STUDENT GROUP	A/R GROUP	RG	AR	AL	EM	FA	SC	SS	AD	SL
RG, DN, PL	Student	Student	Y	Y	10	11	13	Y	N	Y	N
AR	Student	Student	Y	Y	10	11	12	N	14	Y	16
RG, DN, PL	Student	Withdrawn	Y	N	10	11	N	Y	N	Y	N
AR	Withdrawn	Student	N	Y	10	11	12	N	14	Y	16
EM	Student	Student	15	15	N	N	N	N	N	N	N

Conditions

Y: Yes, enforced

N: No, not enforced

10: No immediate notification will be sent to ALUMNI/DEVELOPMENT. Notification to AL will be dispatched from the Student Grade Update process.

11: Yes if A/R or RG initiates the withdrawal. No if A/R or RG withdraws based on notification sent by EM.

12: If the withdrawing student has financial aid record in future aid years

13: If A/R is installed No, otherwise Yes. For Financial Aid includes condition **12**.

14: If withdrawing student's A/R account is set as a Bill To account (self or other) for SUMMER SCHOOL students with current transactions

15: The withdrawal process in EM works differently. In EM, when the user withdraws a student, the system will send notifications to A/R and RG users and will not provide other options. Notification recipients in A/R and RG would initiate their module-specific withdrawal process.

16: If withdrawing student has a STUDENT LOAN record