

## Purpose of Fall Initialization

### ***1. Synchronize fields on the FS, FD and FN EMIS records in the new school year with the corresponding final records in the prior year.***

The initial FS, FD and FN records for the new school year were created at the time the student was promoted to the new school year. In many cases, this was back in December, January or February as districts started preparing for the scheduling process. At that time, the initial records were created with whatever values were on the FS, FD or FN, however changes may have been made and new records created in 21/22 after the initial 22/23 records were created. This would mean that the values on the 22/23 record with the effective start date of 7/1/2022 may no longer be correct. To start out the school year, we want to update that initial record with the latest values from the prior year

### ***2. To reset select fields to default values for the new school year.***

Resets certain fields to default or other predefined values.

StudentInformation gives districts the ability to make changes to records in the new school year prior to the initialization process. Districts may not want Fall Initialization to touch records they've already changed in 22/23. In that case, a feature is provided to flag students that should not have their EMIS records synchronized with the prior year records. The user will be able to indicate for each student, which EMIS record types should be excluded from the Fall Initialization process. By default, all students will be updated by the Fall Initialization process unless the flag FS, FD, or FN is marked to exclude the student from the Fall Initialization process.

An example of a situation where you might not want the changes made to the record would be: A district has a list of students that are approved to attend a JVSD full time in the next school year. Student records in 22/23 were updated to a new EMIS situation to indicate that they are attending the JVS full time. In the 21/22 school year, the students did not attend the JVS but rather the resident district full time. Since the last record of 21/22 shows a "resident attending full time" EMIS situation, we don't want the 22/23 record updated to that situation. The 22/23 record would be flagged to be excluded from the updates that Fall Initialization would perform. If districts made all necessary updates to the 22/23 records manually, then it is not necessary to run Fall Initialization, however, some of the verification reports may be processed anyway to provide information on some students that may need additional updates.

The **Oct Childcount IEP Outcome:** field on the **FN-Attributes** tab doesn't get updated when Fall Initialization is run in update mode. Districts can make changes to a student's **Oct Childcount IEP Outcome:** field without fearing it will be overwritten in the 22/23 school year.



## Task 3 - Update Individual Students to exclude them from being updated by the Fall Initialization process.


By default, all students in 22/23 will have the **Exclude FS Records from Fall Initialization Updates** flags **unchecked** when the new school year script is run, and **will** have their FS, FD, and FN synced to match the corresponding tabs in 21/22.

1. Change your context to the building level and the 22/23 school year.
2. If a student should be excluded from the Fall Initialization synchronization process place the student in context and navigate to the appropriation tab.
3. If the student's **FS-Standing** tab in 22/23 shouldn't be synchronized to match what is currently on the same tab in 21/22, place a check in the **Exclude FS Records from Fall Initialization Updates** checkbox in 22/23.
4. The **FS-Attendance** tab doesn't have its own checkbox because **FS-Attendance** is a continuation of the **FS-Standing** tab. Also, none of the fields on the **FS-Attendance** tab are updated by Fall Initialization.
5. Please see Appendix A for a list of FS fields that will be updated by the Fall Initialization process.
6. NOTE: There are some fields on the FS tab that will not be synchronized to match the FS record in 21/22. These fields are also listed in Appendix A. An example of one of these field is the **Attending Building IRN:** field.
7. Click **Save**.
8. If the student's **FD-Attributes** tab in 22/23 shouldn't be synchronized to match what is currently on the same tab in 21/22, place a check in the **Exclude FD Records from Fall Initialization Updates** checkbox in 22/23.
9. NOTE: There are some fields on the FD tab that will not be synchronized to match the FD record in 21/22. These fields are also listed in Appendix B.
10. Click **Save**.
11. If the student's **FN-Attributes** tab in 22/23 shouldn't be synchronized to match what is currently on the same tab in 21/22, place a check in the **Exclude FN Records from Fall Initialization Updates** checkbox in 22/23.
12. NOTE: There are some fields on the FN tab that will not be synchronized to match the FN record in 21/22. These fields are also listed in Appendix C.
13. Click **Save**.
14. The **FN-Graduate** tab will not be synced by the Fall Initialization process.

## Task 4 - Update Students in Bulk to exclude them from the Fall Initialization process

By default, all students in 22/23 will have the **Exclude FS Records from Fall Initialization Updates**, **Exclude FD Records from Fall Initialization Updates**, and **Exclude FN Records from Fall Initialization Updates** flags unchecked and will have their FS, FD, and FN records synced to match the corresponding tabs in 21/22.

1. Change your context to the building level and 22/23.
2. Navigate to **StudentInformation > Management > Ad-Hoc Updates > Bulk Update Fall Initialization Blocks**.
3. Select an ad-hoc membership from the **-- Select an Ad-Hoc Membership --** dropdown or click on the **...** to create a new ad-hoc.
4. Next in the 

 Perform the following actions on the students in the Ad-Hoc Membership:

section choose which tabs need updated for the selected ad-hoc membership.

5. Example: If you want the FS tab for all students in the ad-hoc to be excluded from the Fall Initialization process, choose the following:

Update	Setting	New Value
<input checked="" type="checkbox"/>	Process FS Records:	<input checked="" type="radio"/> <b>Exclude Student</b> <input type="radio"/> Include Student

6. Click **Submit**.

7. The following message will display

5 Students were successfully updated

8. Finally, navigate to a student listed in the ad-hoc and verify the **Exclude FS Records from Fall Initialization Updates** on the appropriate tab was marked.

9. The Bulk Update Fall Initialization Blocks process can also be run to update students to be synced when the Fall Initialization process was run who were inadvertently marked to be excluded in previous runs of the bulk process.



**Any student with more than one FS, FD, or FN record in 22/23 will not be synced by the Fall Initialization process.**

## Task 6 – Understanding the Fall Initialization Verification Report

Note

This task should be run for **ALL** districts, including those that are not having Fall Initialization processed in Update Mode. The Warnings can then be provided to the district so their data can be corrected prior to the beginning of school.

### Section 1: Students with Warnings

**Warning: Student has more than one FS record and will not be updated.**

**Explanation:** Any student with more than one FS record in 22/23 will not have their FS records synced when Fall Initialization is processed. The student's FS record will need to be manually edited if changes are needed.

**Warning: Student has more than one FD record and will not be updated.**

**Explanation:** Any student with more than one FD record in 22/23 will not have their FD records synced when Fall Initialization is processed. The student's FD record will need to be manually edited if changes are needed.

**Warning: Effective Start Date on FS and/or FD will be reset to 7/1.**

**Explanation:** Any student who isn't newly enrolled for 22/23 and has a start date on their first FS or FD that isn't 7/1/22 will be updated.


**Warning: Assigned building IRN is not \*\*\*\*\*.**

**Explanation:** Any student whose Assigned Building IRN on the FS tab isn't \*\*\*\*\* will show as a warning. These students should be analyzed further to determine if they need to have their Assigned Building IRN updated to \*\*\*\*\*. Very few students should have an Assigned Building IRN that isn't \*\*\*\*\*. Students receiving this warning message will still be updated by the Fall Initialization process.

Students with Warnings								
DistrictCo	Building	FirstName	LastName	StudentNi	EMISId	HowRecei	DistrictWi	CurrentRe Message
EL	ELMS	ROBERT	Student82950	12489	52066821	H		FALSE Student has more than one FD record and will not be updated.
EL	ELMS	ROBERT	Student82950	12489	52066821	H		FALSE Student has more than one FS record and will not be updated
EL	ELMS	REBECCA	Student83977	10999	41762488	*		TRUE Student has more than one FD record and will not be updated.
EL	ELMS	REBECCA	Student83977	10999	41762488	*		TRUE Student has more than one FS record and will not be updated

## Section 2: Preschool students for review

Any student who was enrolled last year and whose **State Equivalent Grade:** field on the **FD-Attributes** tab in 22/23 is PS will be listed in this section. Depending on how the district has their Grade Level Progressions table set up, the PS students from 21/22 who will start Kindergarten in 22/23 could have been promoted to 22/23 as Preschoolers and will need their **State Equivalent Grade:** field on the **FD-Attributes** tab and the **Building Grade:**\* field on the **General** tab updated to say KG.



Please review the list of students before running Fall Initialization in Update mode. If a student is in fact supposed to be a Kindergarten student in 22/23, edit the student's General, FS, FD, and FN tabs. Once the student has been corrected, be sure the student's FS, FD, and FN tabs are marked to be excluded from the Fall Initialization process.

Preschool students for review									
DistrictCo	Building	FirstName	LastName	StudentNumber	EMISId	HowRecei	DistrictWi	CurrentRe	Message
EL	ELEE	ANTONIO	Student70249	200800000	181653766	*		TRUE	Preschool students for review
EL	ELEE	KIET	Student78034	98595	108537710	*		TRUE	Preschool students for review
EL	ELEE	TRAVON	Student78035	98594	108524260	*		TRUE	Preschool students for review
EL	ELEE	SLAYER	Student78036	98593	108517725	*		TRUE	Preschool students for review

### Section 3: Students promoted but withdrawn before 6/30

Students who were promoted to 22/23 and later withdrawn in 21/22 but are still enrolled in 22/23 will be listed in this section. Each student should be analyzed to determine whether they have withdrawn from the district and will not be coming back for the 22/23 school year. If the student isn't returning for the 22/23 school year and was reported in 22S as withdrawn from the district, they will need expunged out of 22/23 prior to the first submission for Student Cross Reference (SCR). Once a student has been reported in SCR for the new school year, they must remain in StudentInformation for the entire school year and can't be expunged.

Students promoted but withdrawn before 6/30									
DistrictCo	Building	FirstName	LastName	StudentNumber	EMISId	HowRecei	DistrictWi	CurrentRe	Message
EL	ELHS	PAUL	Student70243	200800008	181685361		#####		Student promoted but withdrawn before 6/30
EL	ELHS	ZACHARY (ALLE)	Student70293	240922	181326608		#####		Student promoted but withdrawn before 6/30
EL	ELHS	BRIANNA	Student82370	13455	57845249		#####	TRUE	Student promoted but withdrawn before 6/30
EL	ELHS	KANESHA	Student82459	13387	56726432		#####		Student promoted but withdrawn before 6/30
EL	ELHS	MATTHEW	Student82910	12512	52491382		#####		Student promoted but withdrawn before 6/30



The Withdrawal Code '81' has limited uses after ODE revised the description and specified situations in which it can be utilized. It is important that ALL districts receive a copy of the warnings for students who have been promoted to the future school year, but after said promotion, were withdrawn in the current school year.

These students should be expunged from the future school year before the school year begins. If the student does come back to attend in the future school year, and the student was not expunged, these incorrect items with the student's records will cause issues as noted below:

- Student will not have a new district admission record, which causes issues in several areas
- EMIS district admission date will be wrong
- FS Effective start date and FD Effective start dates will incorrectly show 7/1/XX as the effective date, which is incorrect since they weren't enrolled back into the district as of the first day of the school year

## Section 4: Students excluded from Fall Initialization

**Warning: FS records excluded from Fall Initialization.**

**Explanation:** Exclude FS records from Fall Initialization is checked on the student's FS tab.

**Warning: FD records excluded from Fall Initialization.**

**Explanation:** Exclude FD records from Fall Initialization is checked on the student's FD tab.

**Warning: FN records excluded from Fall Initialization.**

**Explanation:** Exclude FN records from Fall Initialization is checked on the student's FN tab.

Students excluded from Fall Initialization											
DistrictCo	Building	FirstName	LastName	StudentNumber	EMISId	HowRecei	DistrictWithdrawalDate	CurrentRe	Message		
EL	ELHS	PAUL	Student70243	200800008	181685361		5/20/2009 0:00	TRUE	FD records excluded from Fall Initialization		
EL	ELHS	PAUL	Student70243	200800008	181685361		5/20/2009 0:00	TRUE	FN records excluded from Fall Initialization		
EL	ELHS	PAUL	Student70243	200800008	181685361		5/20/2009 0:00	TRUE	FS records excluded from Fall Initialization		
EL	ELHS	EMILY	Student70244	200800007	181682324	C		TRUE	FD records excluded from Fall Initialization		
EL	ELHS	EMILY	Student70244	200800007	181682324	C		TRUE	FN records excluded from Fall Initialization		
EL	ELHS	EMILY	Student70244	200800007	181682324	C		TRUE	FS records excluded from Fall Initialization		
EL	ELHS	DOROTHY	Student70247	200800004	181662884	*		TRUE	FD records excluded from Fall Initialization		

## Appendix A: Fall initialization will update the following fields on the FS tabs.

Field	Update
Effective Start Date	If student is not newly enrolled this year (i.e., Admission Date is in a prior School Year) then set to July 1 of the School Year.
Satellite Student	Not Updated.
District Admission Date	Copy from the last FS record in the prior School Year.
Admission Reason	Copy from the last FS record in the prior School Year.
Admitted From IRN	Copy from the last FS record in the prior School Year.
District Withdrawal Date	Not Updated.
Withdraw Reason	Not Updated.
Withdrawn to IRN	Not Updated
State Student Id	Copy from the last FS record in the prior School Year.
EMIS Situation	Copy from the last FS record in the prior School Year.
Student Percent of Time	If the user has selected 'Set Percent of Time for Kindergarten students...' and State Equivalent Grade Level = 'KG' on the first FD in this School Year, then: Set to Max Absence Level of the student's Attendance Calendar. otherwise: Copy from the last FS record in the prior School Year.
Tuition Type	Copy from the last FS record in the prior School Year.
District Relationship	Copy from the last FS record in the prior School Year.
District of Residence	Copy from the last FS record in the prior School Year.
Attending Building IRN	Not Updated.
County of Residence	Not Updated.
Assigned Building IRN	Not Updated.
How Received	Copy from the last FS record in the prior School Year.
How Received IRN	Copy from the last FS record in the prior School Year.
Sent To Reason 1	Copy from the last FS record in the prior School Year.
Sent To IRN 1	Copy from the last FS record in the prior School Year.
Sent To Percent of Time 1	Copy from the last FS record in the prior School Year.
Sent To Reason 2	Copy from the last FS record in the prior School Year.
Sent To IRN 2	Copy from the last FS record in the prior School Year.



<b>Field</b>	<b>Update</b>
Sent To Percent of Time 2	Copy from the last FS record in the prior School Year.
School Year Attendance Hours	0
School Year Excused Absence Hours	0
School Year Unexcused Absence Hours	0
Other Entity School Year Attendance Hours	0
Other Entity School Year Excused Absence Hours	0
Other Entity School Year Unexcused Absence Hours	0

## Appendix B: Fall initialization will update the following fields on the FD tab for all reporting periods with the same value.

Field	Update
Effective Start Date	If student is not newly enrolled this year (i.e., Admission Date is in a prior School Year) then set to July 1 of the School Year.
Effective Stop Date	Not Updated.
State Equivalent Grade	Not Updated.
Attendance Pattern	If Set EMIS Reporting Calendars to Default Attendance Calendar is selected, this Reporting Calendar for ALL students will be set to the building's default calendar in DASL Options. The Attendance Pattern field will be automatically updated for these students based on the Default Calendar in DASL Options. Otherwise, calendar and attendance pattern will remain the assigned values at the time of promotion or any other updates made prior to Fall Initialization.
Disadvantagement	If the user has selected 'Set EMIS Disadvantagement Statuses (*)' then: Set to '*'. otherwise: Copy from the last FD record in the prior School Year.
Free/Reduced Lunch Status	If user chooses to reset Disadvantagement then Free and Reduced Lunch status will be reset to None.
Preschool Poverty Level	If the user has selected 'Reset preschool poverty level for PS students' and State Equivalent Grade Level = 'PS' then: Set to 'N' otherwise: Copy from the last FD record in the prior School Year.
Disability Condition	Copy from the last FD record in the prior School Year.
Section 504 Plan	Copy from the last FD record in the prior School Year.
Homeless Status	If the user has selected 'Set Homeless Status and Homeless Unaccompanied to Not Applicable' then: Set to '*'. otherwise: Copy from the last FD record in the prior School Year.
Unaccompanied Youth	If the user has selected 'Set Homeless Status and Homeless Unaccompanied to Not Applicable' then: Set to 'N'. otherwise: Copy from the last FD record in the prior School Year.

Field	Update
English Learner	If the user has selected 'Set all Limited English statuses to "N"' then: Set to 'N'. otherwise: Copy from the last FD record in the prior School Year.
LEP Reclass Date	Copy from prior year period S record.
Migrant Status	If the user has selected 'Set all Migrant Statuses to "N"' then: Set to 'N'. otherwise: Copy from the last FD record in the prior School Year.
Foreign Exchange Graduation Plan	Copy from the last FD record in the prior School Year.
Immigrant Status	Copy from the last FD record in the prior School Year.
Reporting Calendar	If Set EMIS Reporting Calendars to Default Attendance Calendar is selected, this Reporting Calendar for ALL students will be set to the building's default calendar in DASL Options. The Attendance Pattern field will be automatically updated for these students based on the Default Calendar in DASL Options. Otherwise, calendar will remain the assigned calendar at the time of promotion or any other updates made prior to Fall Initialization.

## Appendix C: Fall initialization will update the following fields on the FN-Attributes tab.

Field	Update
EMIS Grade Next Year	Use the State Equivalent Grade Level on the first FD record in this School Year and the Grade Level Progression to determine the Grade Level, Next Year. However, if Grade Level is = 'UG' then set to '**'.
Retained Status	'*'
October 1 IEP Outcome	Not Updated
Military Student	Not Updated
CTE Program Area	Copy from prior year period S record.
CTE Program of Concentration	Copy from prior year period S record.
Fiscal Year began 9 <sup>th</sup>	Copy from prior year period S record.
Tech Prep Completer	Not Updated
Majority of Attendance IRN	'*****'
Accountability IRN	'*****'
Attending Building IRN Next Year	Not Updated
Admission to Current High School Date	Not Updated
Attending District IRN Last October	Not Updated
Math Diagnostic Result Code	Not Updated
Reading Diagnostic Result Code	Not Updated
Writing Diagnostic Result Code	Not Updated
Report To EMIS	Copy from prior year period S record.