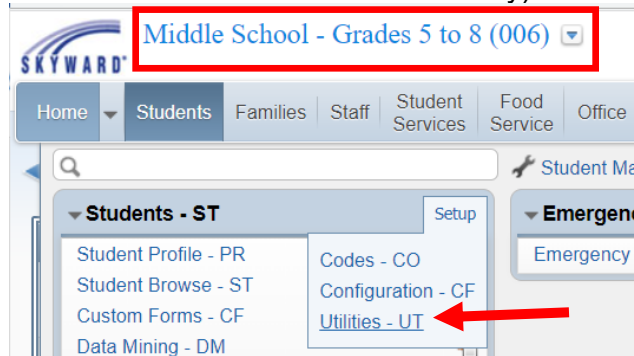


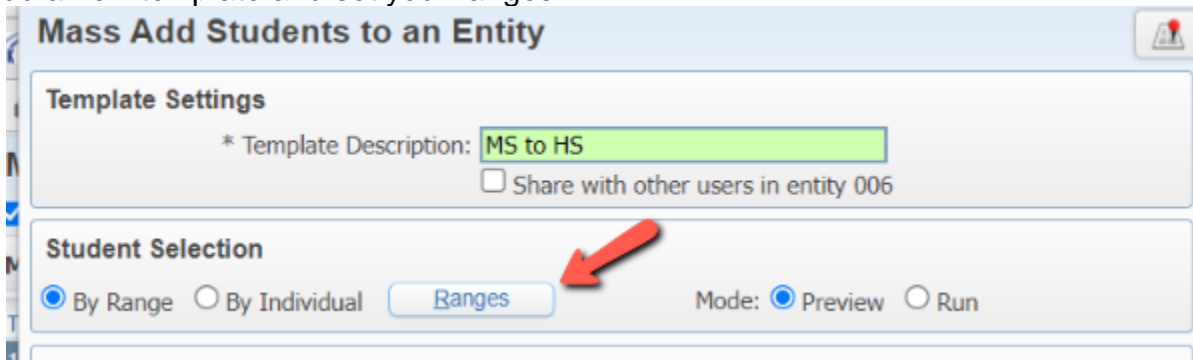
## Mass Add to an Entity

This utility is used to Mass Add students from one entity to another. In this example we will add 8<sup>th</sup> graders from the Middle School entity to the High School entity prior to year-end.

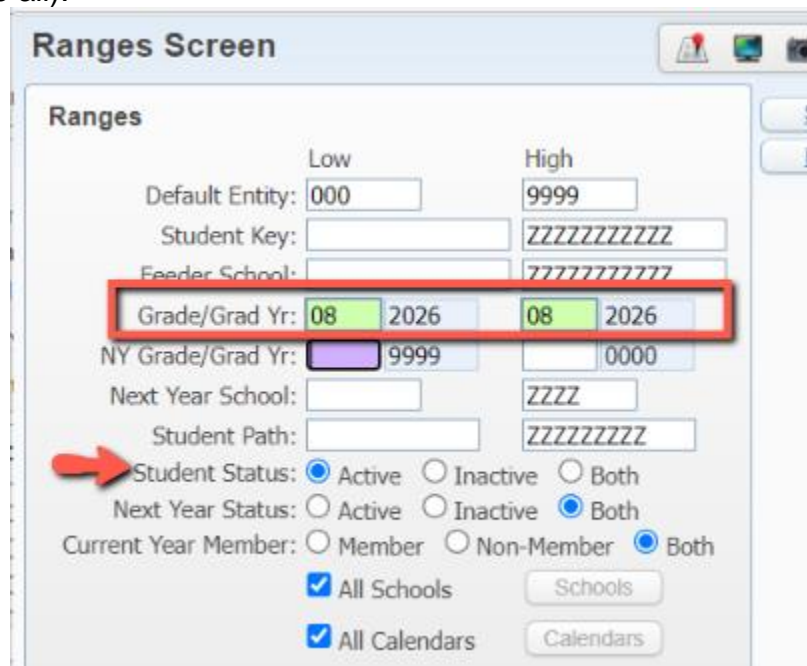
- Mass Add to an entity can be found under Students -> Setup -> Utilities
- Run this utility in the students' current entity (i.e. 8<sup>th</sup> graders are currently in the Middle School so the utility will be run from the Middle school entity).



- Add a new template and set your ranges:



- You will want to include only Active 8<sup>th</sup> grade students (the other ranges can be left wide open or include all).



- Criteria Options
  - Check Use Path to determine Entity and School for new record option when you have multiple High Schools in your district and either address or NY School is set in general tab.
    - **\*\*Remove future dual enrollment recorders outside of the path in all entities and Add students to All Schools indicated in their path are only available if using "Paths."**
  - Select/Enter the entity you want to add the students into, i.e. the HS entity
  - Check the Set NY Status in Student's Current Entity to Inactive option (this will mark the current 8<sup>th</sup> grade students inactive for the following school year)

**Criteria Options**

Use Path to determine Entity and School for new record ?

Remove future dual enrollment records outside of the path in all entities ?  Exclude Summer Schools

Add students to All Schools indicated by their Path

Add Students to Entity: **010** ▾ High School Grades 9 to 12

Set NY Status in Student's Current Entity to Inactive  Set to Active if NY Schl places in Current Entity

- Student New Entity Values
  - Do not check Set the new Entity as the Student's Default entity (only check this option if you are moving students in the new year, if running prior to yearend roll over you do not want to change the default entity of 8<sup>th</sup> grade students to the HS.)
  - Student Status = Inactive, when running prior to roll over (you do not want active 8<sup>th</sup> grade students in the High School for the current year.)
  - Next Year Status = Active, this will change their default entity at year end rollover.
  - Membership = No, when running prior to roll over (you do not want 8<sup>th</sup> graders to be current members in the High school for the current year.)
  - Leave Feeder School blank (this option is only used if for example Students from MS A & B go to HS A and students from MS C go to HS B - we will not use this option in this example)
  - **Entry Record Values – you must set this prior to running! See details in the next section, below.**
  - Select School = High School entity
  - Select Calendar = High School calendar
  - Homeroom and Advisor can be set if used, in this example we will leave blank.

**Student's New Entity Values**

Set the new Entity as the Student's Default Entity ?

Student Status:  Active  Inactive  Use Present Status  Use Present Next Year Status

Next Year Status:  Active  Inactive  Use Present Next Year Status

Membership:  Yes  No  Use Present Membership

Feeder School:  ▾ Use Present Feeder School ?

School: **010** ▾ School (010)

Calendar: **010** ▾ Calendar (010)

Homeroom:  ▾ (\*\* to carry forward current Student Homeroom)

Advisor:  ▾ (\*\* to carry forward current Student Advisor)

- **Click the Entry Record Values button – this step is extremely important**, as it will determine what will be used in the entry record for the High School.

**Student's New Entity Values**

Set the new Entity as the Student's Default Entity ?

Student Status:  Active  Inactive  Use Present Status  Use Present Next

Next Year Status:  Active  Inactive  Use Present Next Year Status

Membership:  Yes  No  Use Present Membership

Feeder School:  Use Present Feeder School ?

**Entry Record Values** ←

School: 010 School (010)

Calendar: 010 Calendar (010)

Homeroom:  (\*\* to carry forward current Student Homeroom)

Advisor:  (\*\* to carry forward current Student Advisor)

- Set the entry date into the High School, must be between July 1 and the first day of school. Typically districts will pick a specific date to enter students with.
- Enrolled % = 100
- Add a comment as needed (i.e. Move from MS to HS)
- Select the Correct entry code \*not required (i.e. Transfer, Promoted, etc. – entry type should = Reentry in the district)
- Keep student type as “R” – Regular
- Student Aid Category = 14 (Res/All Other)
- Resident District = your district code
- Be sure to check all boxes in the Entry Record Default Options (i.e. Student Type, District, State Aid)
  - This will carry over the data from the student’s entry record in the MS (and overwrite what you selected above)

**Default Entry/Withdrawal Parameters**

**Default Entry Parameters for Entity (010)**

Entry Date: Enter a specific entry date

Date: 08/01/2022 ←

% Enrolled: 100

Entry Code: PRO Promoted ←

Comment: Move from MS to HS ←

Student Type: R Regular ←

Student Aid Category: 14 Res/All Other ←

Resident District: 0000051 District (0000051)

Save ←

**Entry Record Default Options**

Selecting an item below indicates you would like the default value for the field to come from the student's previous entry record. To get these default values, the program will first look for the last entry record in the entity the entry record is being added to. If no entry record is found for the student in that entity, the defaults will come from the student's last entry record, no matter which entity it is in. The exceptions to this are school and calendar. These defaults must come from an entry record in the entity the entry record is being added to.

If no prior entry record is found, the program will use the default values entered above.

Student Type  District  State Aid

- Save

- **ALWAYS** run this utility in “Preview” Mode first, to ensure that you have the correct students. Select Preview and Save and Run.

**Mass Add Students to an Entity**

**Template Settings**

\* Template Description:

Share with other users in entity 006

**Student Selection**

By Range  By Individual

Mode:  Preview  Run

- Once you have verified the correct students on your report, you can edit your template and select “Run” mode and Save and Run.

**Mass Add Students to an Entity**

**Template Settings**

\* Template Description:

Share with other users in entity 006

**Student Selection**

By Range  By Individual

Mode:  Preview  Run

- Your 8<sup>th</sup> grade students should now have an entry record in the HS similar to this:

Entity	Entry	Code	School	Schl Nbr	Calendar	Withdrawal	Code	Grad Year	School Year	Grade	Dft Ent	%Enrolled	GLO	ST	District
010	08/01/2022	PRO	010	00010	010			2026				100		R	0000051