

## Formation Remove/Advance Process

### Removing or Advancing Student, Family, and Catechist Information

There are several utilities in the Formation program that will assist you with Year-end data maintenance. These include:

- Updating a student's permanent record with this year's Session and Attendance information
- Removing graduating and/or inactive students
- Deleting the student's current year schedule, attendance, service, and retreat information so as to keep only current information
- Promoting students to the next grade
- Promoting students from one session to another, as a group.
- Updating a Catechist's history record with this year's Session information
- Removing inactive Catechists
- Deleting the Catechist's current year schedule and attendance so as to keep only current information

The information needs of your Formation office will dictate which of these utilities are performed and in what sequence they are performed. The utilities you select for processing do not have to be processed at the same time. For example, you may want to perform the grade promotion process to get an accurate count of the number of students in a particular grade for the next year but you may not be ready to remove the prior year session and attendance information. You will want to plan the sequence of events ahead of time and keep a log of which processes have been executed. This will avoid such problems as removing graduating students who were just promoted to the graduating grade or adding information to permanent records that was not deleted at the beginning of the year, resulting in duplicate information. Careful planning is the key to successful year-end processing!

There are three processes that can be used as part of ending the religious education school year:

- Grade Promotion –can be done separately, or as part of Remove/Advance.(pages 4, 6)
- Remove/Advance information – the main process, where old information can be deleted and new information created. (page 2-5)
- Automatic Class/Session Promotion – an optional process, used to promote a group of students from one session to another. (page 8)

#### Step 1. Make a Data Backup

Every time you start one of the three processes, you will be prompted to back up your current data. The changes that are applied during the processes cannot be 'undone' and the data can be altered quite significantly. For this reason, if you plan to execute any End of Year procedures, it is recommended that you make a backup of your current data each time.

## Formation Remove/Advance Process

### Step 2. Set up the Remove / Advance Processing Options

To begin the Remove/Advance process, click on **Processes | Classes/Sessions | Remove/Advance**.

Remove and Advance processing options (see Fig. 1) can be applied to the following categories of information:

- Students' Permanent Records
- Inactive or Obsolete Student and Family Information
- Automatic Grade Promotion
- Catechists' History Records
- Inactive or Obsolete Catechist Information
- Including Inactive Records

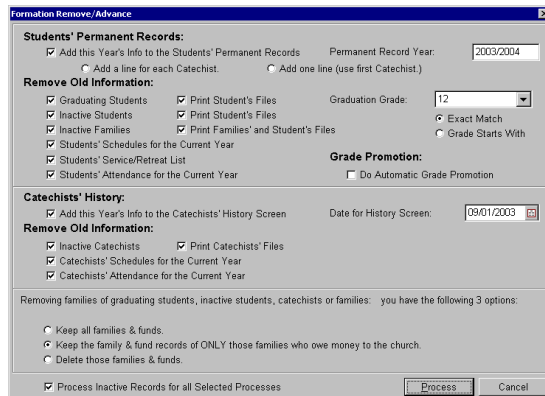


Fig. 1

### Updating Students' Permanent Records

To update the Permanent Record listing for a student click the “Add this Year’s Info to the Students’ Permanent Records” checkbox and enter the Year to be recorded for the information that is updated. If multiple Catechists are responsible for a class/session, and you wish all their names to be listed in the students Permanent Record, check “Add a line for each Catechist”. If you wish to add only one line to the student’s Permanent Record screen, check the “Add one line (use first Catechist)” option. Only the first Catechist listed on the **Class Schedule | Information** screen will be listed.

Notes: 1) If you have already assigned students to classes for the following year, there is no way to choose which class to enter on the student’s Permanent Record. Both classes will be recorded. 2) Executing the **Processes | Student Process | Automatic Class/Session Promotion**, to promote classes to another class/session, deletes the current class/session. If you wish to use the Automatic Class/Session Promotion process and add the current class/session to the student’s permanent record, you will want to update the Student Permanent Record before the Automatic Class/Session Promotion process.

A Student’s Permanent Record can be viewed by selecting **Students | Student Detail | Permanent Record** from the Formation main menu (see Fig. 2). Results of sessions attended, along with attendance information, are copied from the Student’s Session and Attendance records to their permanent record. Note that this process does not remove any of the current year session and attendance information. It is recommended that removal of current year information be done prior to the next update of permanent records so that information on the permanent record is not duplicated.

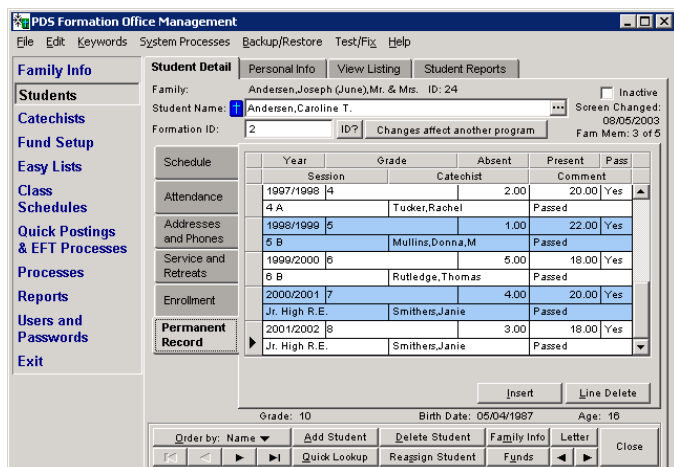


Fig. 2

## Formation Remove/Advance Process

### Removing Inactive or Obsolete Student Information

There are several options available for quickly removing Student data that is no longer needed by your Formation Office program. Refer to Fig. 1 for an illustration of these options. These include:

#### ❑ **Removing Students who are graduating**

You can remove students who are graduating by selecting the 'Graduating Students' checkbox and indicating what grade in your Formation grade list is considered the graduating year. The graduation year is dependent on your Parish's Formation offerings. For example, if your Formation Program includes classes for 1<sup>st</sup> through 8<sup>th</sup> grade you may want to consider 8<sup>th</sup> grade (and above) to be your graduating class. In this case, you would enter grade 8 as the Graduation Grade and select the 'Grade Starts with' option. If you offer classes to High School students, your graduating class would be an 'Exact Match' of Grade 12. Note that this option does not remove any students as members of shared databases, such as Church Office. They will simply have their Formation Student attribute removed so that they will be hidden from your Formation student listings. You will also have the option of printing the Formation records for any students who will be deleted in this process. Click the 'Print Student's Files' checkbox to enable this feature.

#### ❑ **Removing Inactive Students**

Students who are marked inactive in the Formation program can be removed from the Formation student listings by checking the Inactive Students option under the Remove Old Information section. You also have the option to print the records of any students who will be removed during this process by checking the 'Print Student's Files' option. Note that this will not remove active members in the Church or School programs, if your data is shared with these programs. The student will simply be hidden from view in the Formation program. Additional options are presented for the cases when the inactive student who is being removed is the last student in a family. In this case, you will have the same 3 options for processing that are presented with the removal of inactive families (see below).

#### ❑ **Removing Inactive Families**

Families who are marked inactive in the Formation program can be removed from the Formation family listings by checking the Inactive Families option under the Remove Old Information section. You also have the option to print the records of students and families who will be removed during this process by checking the 'Print Families' and Student's Files' option. Note that this will not remove active families in the Church or School programs, if your data is shared with these programs. The family will simply be hidden from view in the Formation program.

You will also have 3 options when removing inactive families:

- Keep all family and fund information. This will remove all members in the family but keep the family information (as inactive), including fund history
- Keep family and fund information only if there is a balance due
- Delete the family and students which will remove (or hide) family and student information in the Formation program.

#### ❑ **Removing Current Year Student Schedules**

This process will delete all current year schedule information, displayed on the **Students | Student Detail | Schedule** tab. Be sure to select the option to update the Student's permanent record, if you wish to keep this information, at the same time or prior to processing this option.

## Formation Remove/Advance Process

### ❑ Removing Current Year Service and Retreat Records

This process will delete all current year service and retreat information, displayed on the **Students | Student Detail | Services and Retreats** tab. This information is not saved anywhere in the program and is not included in the Student's permanent record.

### ❑ Removing Current Year Attendance

This process will delete all current year attendance information, displayed on the **Students | Student Detail | Attendance** tab. Be sure to select the option to update the Student's permanent record, if you wish to keep this information, at the same time or prior to processing this option.

## Automatic Grade Promotion

Check the 'Do Automatic Grade Promotion' option to include the Grade Promotion process with your Remove/Advance operations. Note that if you performed Grade Promotion from the **Processes | Grade Promotion** selection, you should not perform Grade Promotion here.

If the program detects that it has been less than a year since you last performed the Grade Promotion process, you will receive a warning message (see Fig. 3), to protect against promoting students more than once in a year. For more information regarding the options for Grade Promotion Processing, see the **Grade Promotion Process** beginning on pg. 5.

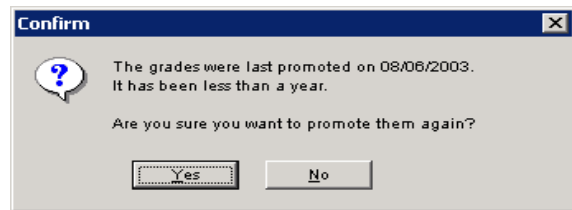


Fig. 3

## Updating Catechist's History Records

To update the History Record for a Catechist click the "Add this Year's Info to the Catechists' Permanent Records" checkbox and enter the Date to be recorded for the information that is updated.

A Catechist's History can be viewed by selecting **Catechists | Catechist Detail | History** from the Formation main menu (see Fig. 4). The Catechists' current session information will be copied to this history. Note that this process does not remove any of the current year session or schedule information. It is recommended that removal of current year schedule for the catechist be done prior to the next update of the Catechists' permanent records so that information on the permanent history record is not duplicated

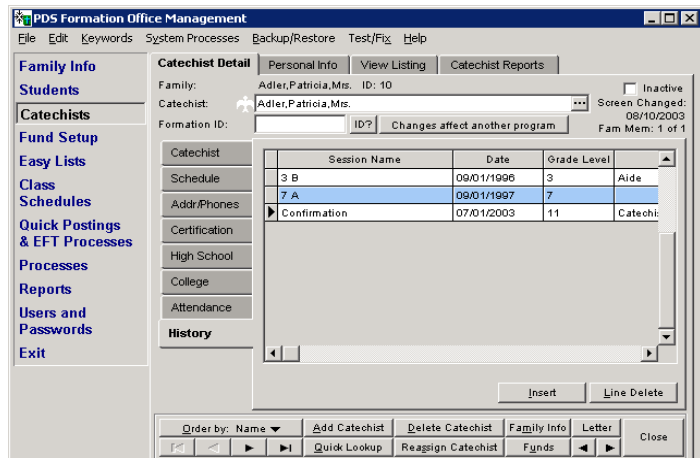


Fig. 4

## Inactive or Obsolete Catechist Processing

There are several options available for quickly removing Catechist data that is no longer needed by your Formation Office program. Refer to Fig. 1 for an illustration of these options. These include:

## Formation Remove/Advance Process

### ❑ Removing Inactive Catechists

Catechists who are marked inactive in the Formation program can be removed from the Formation Catechist listings by checking the Inactive Catechists option under the Remove Old Information section. You also have the option to print the records of any Catechists who will be removed during this process by checking the 'Print Catechists' Files' option. Note that this will not remove active members in the Church or School programs, if your data is shared with these programs. The Catechist will simply be hidden from view in the Formation program. Additional options are presented for the cases when the inactive Catechist who is being removed is the last or only member in a family. In this case, you will have the following 3 options for processing these families:

1. Keep all family and fund information. This will remove the inactive Catechists in the family but will keep the family information (as inactive), including fund history
2. Keep family and fund information only if there is a balance due (for Catechists who also have had Formation students in their family)
3. Delete the family and Catechists which will remove (or hide) family and student information in the Formation program.

### ❑ Removing Current Year Catechist Schedules

This process will delete all current year schedule information, displayed on the **Catechists | Catechist Detail | Schedule** tab. Be sure to select the option to update the Catechist's permanent record, if you wish to keep a history record of session information, at the same time or prior to processing this option.

### ❑ Removing Current Year Attendance

This process will delete all current year attendance information, displayed on the **Catechists | Catechist Detail | Attendance** tab. This information is not permanently saved in the History record for the Catechist so be sure to record any attendance information that you may need to retain prior to processing this selection.

## Processing Inactive Records for All

Check the 'Process Inactive Records for all Selected Processes' at the bottom left of the screen to include Inactive Students and Catechists in the Advance processes. This option might be used when you have Students or Catechists that are temporarily (or for an unknown period) marked inactive but should be included in Grade Promotion or Advancement processing, if you are not selecting the option to delete the inactive Students and/or Catechists during this process.

## Step 3. Process the requested changes.

When you are satisfied with the selections you have made, press the Process button. This will display a window (Fig. 5) asking you to verify that you are ready to process the changes you have chosen.

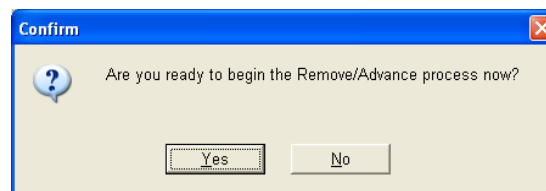


Fig. 5

## Formation Remove/Advance Process

If you have selected to do the Automatic Grade Promotion, the Grade Promotion Wizard will display after processing all your other selections. There are 3 steps in the Grade Promotion Process:

1. Grade Promotion Setup
2. Verifying Promotion Updates
3. Processing the changes.

### • Grade Promotion Setup

The first step of the Grade Promotion Process wizard is to enter the first and last grades of students who will be promoted, along with the grade they will be promoted to (see Fig. 6).

The grades and degrees which are listed in the drop-down grade lists are defined from the **Keywords | Grades and Degrees** list available from the menu toolbar. Typically, you will start with the first grade on your list (Pre-School or Kindergarten) and end with Grade 12, the last grade where grade promotions are routinely applied. You will have the option to promote the students in the last grade listed (grade 12, in our example) to Young Adult status. This is one way to distinguish between members whose last grade completed is grade 12 and students who are currently in grade 12.

The screenshot shows the 'Grade Promotion Process' window. At the top, it states 'Last Performed: Never Performed in this Version' and includes a warning: 'Warning: This process promotes students for all programs sharing the same data file.' Below this, there is a description: 'Use this process to promote students to the next grade level. The grade promotion process only affects those students entered with a type of Child.' The window contains two dropdown menus: 'Begin Promotion with Grade:' set to 'Pre-School' and 'End Promotion with Grade:' set to '12'. There are three radio buttons for 'Change the type for those currently in the last grade listed below from Child to Young Adult': 'Only Active Students', 'Only Inactive Students', and 'Active and Inactive' (which is selected). Below these is a table with three columns: 'Promote From Grade', 'Promote To Grade', and 'Change Type to Young Adult'. The table has rows for grades 6 through 12. The 'Change Type to Young Adult' column has checkboxes, with the checkbox for grade 12 checked. At the bottom of the window are buttons for 'Data Options', '< Back', 'Next >', and 'Cancel'.

Promote From Grade	Promote To Grade	Change Type to Young Adult
6	7	<input type="checkbox"/>
7	8	<input type="checkbox"/>
8	9	<input type="checkbox"/>
9	10	<input type="checkbox"/>
10	11	<input type="checkbox"/>
11	12	<input type="checkbox"/>
12	12	<input checked="" type="checkbox"/>

Fig.6

### Note: users sharing data with School / Church Office

Grade promotions will, by default, be applied to all actively shared member data files, including Church Office members or School Office students who are not set up in the Formation Office program. Students who are graduating from Grade 12 and are marked to have their member type changed to 'Young Adult' will also have the Young Adult status reflected on the Student screens in the School Office program and on the Member screens in the Church Office programs.

If you have Student or Member grade level data that is out of sync between your Formation, School, and Church Office Management programs, or if you do not want grade promotions to be applied to students who are not in set up as Formation students, you can selectively perform the grade promotion process by clicking the Data Options button and checking only the programs you want the grade promotion to be applied to (see Fig. 7). You will, however, most likely want to promote students used by all programs at the same time. If a member/student is shared between Formation and Church Office, for example, they will have only one grade level – you can not selectively promote the same student in Formation but not in Church Office.

The screenshot shows the 'Grade Promotion Data Options' window. It has three sections, each with a checked checkbox: 'Promote Children in Church Office: Church Office Management', 'Promote Children in Formation Office: Formation Office Management', and 'Promote Children in School Office: School Office Management'. At the bottom are buttons for 'Use/OK' and 'Cancel'.

Fig. 7

## Formation Remove/Advance Process

### • Verifying Promotion Updates

After setting up the Grade Promotions by entering the 'to' and 'from' grades to promote, click 'Next'. The Formation program will build a list of students it has identified as fitting the promotion criteria you have entered (see Fig. 8). By default, the program will mark all students listed for grade promotion. You can unmark individual students, to bypass grade promotion for those students, by clicking in the 'Selected' box for that student to remove the checkmark. You can unmark all students by clicking the 'Clear All' button or mark all students for promotion by clicking the 'Mark All' button.

There are 2 entries from the Grade Promotion List that can be modified, if there are exceptions to the default promotion entries, prior to applying any updates:

1. You can override the grade to promote a student to by typing over (or selecting from the drop-down list) the New Grade entry for that student. For example, if a student is skipping grade 4 (or if a grade was incorrect prior to the grade promotion), you can change the default grade promotion from grade 3 to grade 4.
2. You can also change the current Member Type for any listed students by clicking in the Member Type cell for that student and selecting a new member type. For example, you may want to change older students to 'Young Adult'.
3. After verifying the list of students marked for promotion, you can click Next to process the changes. You may exit the process without promoting any students by clicking the Cancel button.

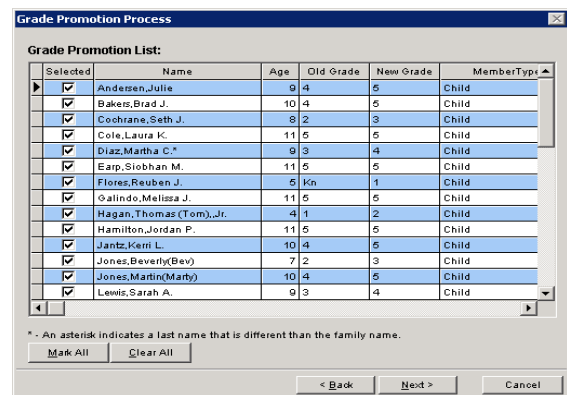


Fig. 8

### • Processing the Changes

Once you have verified the list of students for promotion and the new grade levels, click the Next button to apply the changes to the Student/Member records.

You will have the option to print a report of the changes applied (see Fig. 9). To bypass printing the Promotion Update listing, remove the checkmark by clicking in the checkbox. Click the 'Finish' button from the report prompt to update the Formation, Church, and/or School databases. You can also exit the process without updating by clicking the 'Cancel' button.

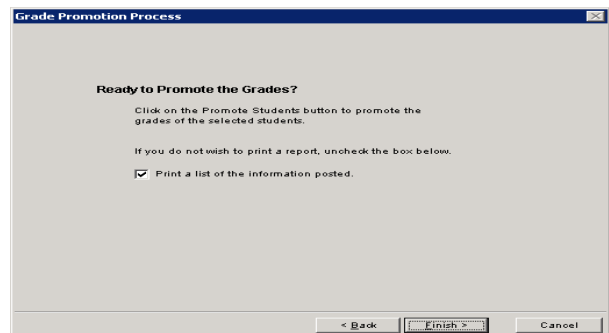


Fig. 9

## Formation Remove/Advance Process

### Automatic Class/Session Promotion

Some Religious Education programs advance students from one class/session to another for the following year. For example, all students in a class/session called 'Jr. Hi Level 1' are promoted to 'Jr. Hi Level 2'. You will want to carefully choose which items in the **Processes | Classes/Sessions | Formation Remove/Advance** process you perform before you do the **Processes | Classes/Sessions | Automatic Class/Session Promotion**. Use the following steps in a situation like this.

- 1) In the **Formation Remove/Advance** process, you could do everything EXCEPT remove the Student Schedule and Catechist Schedule for the current year. You will need the information on the Student Schedule and Catechist Schedule screens to perform the **Automatic Class/Session Promotion** process.
- 2) In the **Formation Remove/Advance** process, if you want to add this year's info to the Student Permanent Record Screen, you need to do this BEFORE you perform the **Automatic Class/Session Promotion**.
- 3) The **Automatic Class/Session Promotion** process replaces the old session with the new one. As a result, there is no need to go back to the **Formation Remove/Advance** process to remove the Student Schedule. Nor is there any reason to change the Catechist Schedule screen unless there is a change of Catechists for the next year. In that case you would have to assign the new Catechist to that Class/Session on that Catechist's Session screen, and delete the Class/Session from the Catechist's Session screen who will no longer be teaching that class.