



Highline Public Schools Board Action Report

☒ Supports the Strategic Plan

DATE:12/5/18

FROM: Dr. Susan Enfield, Superintendent

LEAD STAFF:Mark Finstrom

For Introduction:12/5/18 For Action:12/19/18

I. TITLE Interlocal Agreement with Northshore School District allowing use of Northshore School District's Student Information System RFP.

II. WHY BOARD ACTION IS NECESSARY This Interlocal Agreement provides Highline Public Schools with a state approved purchasing process using Northshore's Student Information System RFP for the purchase of software and services.

III. BACKGROUND INFORMATION

Current Student Information System will no longer be supported in Washington State, effective August 31, 2019.

IV. RECOMMENDED MOTION

I move that the Highline School Board approve this Interlocal Agreement, allowing Highline Public Schools the opportunity to negotiate and execute a contract with Edupoint Educational System LLC, using Northshore's RFP for Student Information System and Services purchase as an authorized purchasing process.

V. FISCAL IMPACT/REVENUE SOURCE

Fiscal impact to this action will be (amount and source including fund Example - \$522,000 from general fund Title 1 revenue).

\$347,326 first year, includes product, hosting, maintenance and services.

5 year fiscal impact \$1,325,455, not including all components of Edupoint's Synergy software that may be added over the five year agreement.

The revenue source for this motion is General Funds.

Expenditure: ☒ One-time ☒ Annual

VI. APPLICABLE POLICY(S)

This action is in compliance with the following:

VII. ALTERNATIVES

Highline Public Schools could enter into an agreement with OETC for operation of a state approved Student Information System. (OETC has issued a RFP for Student Information Systems. This cooperative agreement would give us another avenue to purchase a SIS replacement should the Northshore Interlocal not be accepted.)

Highline could enter into an agreement with WSIPC for their cumulative product; however, in speaking with other state clients, the product is not performing at the level to which those clients are satisfied. (Highline staff have determined that the Cumulative product is not ready for WA school districts. Highline staff have had conversations with WSIPC districts using the product. State reporting and other functions are not fully developed.)

Highline has not found Interlocal language with other districts related to the purchase of PowerSchool SIS; however, Highline is a client of PowerSchool. (The SIS product is in use in WA; however, it does not have all the feature sets and functionality that Highline requires. Also, a viable contract for purchasing the product has not been found. This would require an RFP. In addition, PowerSchool owns our current BusinessPLUS financial and HR software. We are reviewing that software package to determine if we need to consider other systems.)

VIII. COMMUNITY ENGAGEMENT

Community Engagement Required: ☐ Yes ☒ No

If yes, list community engagement conducted for this issue

IX. POLICY MONITORING PLAN

This ☐ new or ☐ revised policy will be monitored by the School Board:

☐ Quarterly ☐ Semi-Annually ☐ Annually ☐ Not Applicable

The metrics that will be used to monitor this policy include: _____

X. ATTACHMENTS

Interlocal Agreement from Northshore School District (3 pages)

Northshore School District RFP (441 pages)

Edupoint's Response to Northshore RFP (163 pages)

Sample of Highline agreement with Edupoint (negotiated after approval of this BAR) (33 pages)

**INTERLOCAL AGREEMENT BETWEEN
NORTHSHORE SCHOOL DISTRICT NO. 417
AND HIGHLINE SCHOOL DISTRICT NO. 401**

**FOR PURCHASING OFF OF
NORTHSHORE SCHOOL DISTRICT'S, STUDENT INFORMATION SYSTEM
SOLUTION AND IMPLEMENTATION SERVICES REQUEST FOR PROPOSAL
DATED NOVEMBER 6, 2013 AND PURCHASE AGREEMENT
WITH EDUPOINT DATED FEBRUARY 24, 2014**

This Interlocal Agreement ("Agreement") is entered into by and between Northshore School District No. 417 and Highline School District No. 401 (collectively "Parties"). The Parties hereby enter into this Agreement as of the date of execution subject to the terms and conditions contained herein.

RECITALS

WHEREAS, each of the Parties is a duly constituted School District organized and existing under and by virtue of the laws of the State of Washington. Each of the Parties is also a public agency, as that term is defined by RCW 39.34.020, and

WHEREAS, school districts in the State of Washington are authorized by RCW 28A.320.80 and Chapter 39.34 RCW, to enter into cooperative agreements for the purchase of various software, supplies and services; and

WHEREAS, Northshore School District solicited a request for proposal for software and services per RCW 39.04.270 dated November 6, 2013;

WHEREAS, Northshore School District's Request for Proposal for Student Information System Solution and Implementation Services, dated November 6, 2013 and Purchase Agreement with Edupoint, dated February 24, 2014 permits other public agencies to avail themselves of the software and services offered under the Agreement, provided, however, that the Northshore School District will not have any responsibility or liability for purchase orders issued by other public agencies utilizing the Northshore School District's Agreement;

WHEREAS, the Highline School District desires to reduce its respective costs in procuring equipment and services; and

WHEREAS, the Parties recognize and find that this Agreement will permit the Parties to make the most efficient use of their powers by enabling them to cooperate with each other on a basis of mutual advantage and that it is in each of their best interests to cooperate and join in certain purchasing activities;

NOW, THEREFORE, BE IT RESOLVED by each Board of Directors for each of the Parties, for and in consideration of the promises and covenants contained herein, the Parties agree as follows:

AGREEMENT

1. Purpose. The purpose of this this Agreement is to allow Highline School District to purchase equipment and services through Northshore School District's Purchase Agreement with Edupoint, dated February 24, 2014.
2. Scope. This Agreement shall allow the purchase or acquisition of equipment and services by Highline School District directly from Edupoint, per the Northshore School District's Edupoint, contract. A provision in Northshore School District's contract with Edupoint, permits other agencies to avail themselves of the equipment and services offered under the contract.
3. Duration. This Agreement shall become effective once it is fully executed and posted on each Parties' website.
4. Termination. This Agreement shall remain in force until terminated by either Party upon thirty (30) calendar days' written notice to the other Party.
5. Administration of Agreement. It is not the intent of the Parties, nor shall this Agreement be interpreted, to create a new or separate legal entity for the performance of this Agreement. Instead, the Boards of both Parties shall jointly administer this Agreement.
6. Manner of Acquiring, Holding, and Disposing of Property. The Party purchasing equipment or services under this Agreement shall be solely responsible for acquiring the personal property it purchases, and all such property shall be held in that Party's name. That Party shall also have the responsibility for disposing of such property for the duration of the Agreement and upon termination of the Agreement.
7. Manner of Financing. The method of financing this Agreement shall be through budgeted funds or other available funds of the Party for whose use the property is actually acquired or disposed. Each Party accepts no responsibility for the payment of equipment or services acquired for the sole and exclusive use of the other Party.
8. Budget. The Party purchasing the equipment or services under this Agreement shall be responsible for all budget and accounting procedures related to such purchases.
9. Bidding Requirements. The Parties acknowledge that Northshore School District's Purchase Agreement with Edupoint, dated February 24, 2014 was the result of its request for proposal for software and services per RCW 39.04.270 dated November 6, 2013.

The Party contracting with a third party vendor through a bid, proposal or contract (the lead agency) shall comply with its statutory requirements regarding notice for bids and proposals for goods and services subject to this Agreement, and the lead agency shall either post the bid or solicitation notice on a website established and maintained by a public agency, purchasing cooperative, or similar service provider, for purposes of posting public

notice of bid or proposal solicitations, or shall provide an access link to the notice on the State of Washington's web portal.

10. Adoption of Agreement. The Board of Directors for each Party authorizes this Agreement and has or will take action by resolution, motion, or other necessary action to approve this Agreement.

11. Independent Right to Contract. Each Party reserves the right to contract for the purchase or disposal of any particular class of goods or services, with or without notice being given to the other Party.

12. No Obligation. This Agreement does not obligate either Party to acquire goods or services or dispose property through the contractual agreements of the other Party.

13. Amendments. This Agreement may be amended or modified by mutual agreement of the Parties. Any amendment or modification shall be in writing, signed and duly approved by the Boards of both Parties.

14. Governing Law. The terms of this Agreement shall be governed by the laws of the State of Washington.

15. Signatures. The Parties acknowledge that they have read, understand and accept this Agreement, including any supplements or attachments, and that this Agreement constitutes the entire agreement between them and supersedes all other communications, written or oral, relating to the subject matter of this Agreement.

Highline School District No. 401

Northshore School District No. 417

Signature on file

Dr. Susan Enfield, Superintendent

Dr. Michelle Reid, Superintendent

Date

Date

Northshore School District

RFP # 11054

Attachment A1 – Statement of Work (SOW)

Important Instruction: Vendors are required to indicate any proposed changes to this SOW directly into this document. The document's "track changes" feature is currently activated in order for these changes to be reflected and which would facilitate discussions with NSD during contract negotiation process with the selected vendor. Please save the document with the "tracked changes" activated and attach to your proposal.

DATE

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1.0 Statement of Work

This Statement of Work ("SOW") describes the services ("Services") to be provided by the Vendor in assisting NSD with the implementation of the Student Information System ("SIS") solution and is entered into as of the Statement of Work Effective Date set forth below.

2.0 Term of the SOW

Statement of Work Effective Date:

Duration: This SOW will terminate when the implementation has stabilized. Stabilization metrics (which will be utilized to determine that Stabilization has been achieved) will be developed and mutually agreed to prior to system Go-Live.

3.0 Project Directors

NSD		Vendor	
Name:		Name:	
Title:	Executive Director for Information Technology & CIO	Title:	
Contact Info:		Contact Info:	
Email:		Email:	

4.0 Scope

NSD desires to achieve its strategic goals through the replacement of its current SIS and improvement of related business processes. NSD desires to deploy new technology and adopt "leading practice" business processes that are supported by modern SIS solutions.

Vendor will perform the Services described in this SOW and will collaborate with NSD in the implementation and execution of the Project as further described in this SOW.

The parties intend that the Vendor will manage the Project at all times during its engagement under this SOW and shall lead, coordinate, oversee and manage all activities associated with the various phases comprising the Project, subject to the terms and conditions of the Contract between NSD and the Vendor and this SOW. The Parties acknowledge that and nothing in this section is intended to alter the parties' respective responsibilities under this SOW, including their responsibilities for Project subcontractors. During the term of this SOW, Vendor (with support from NSD specified in this SOW and Contract) will facilitate and provide Services for the planning, management and creation of selected Project Deliverables, as further described below.

An overview of each segment of the Project and the Services to be performed for each are set forth below:

1. **Project Management & Preparation:** Involves establishing the necessary tools, resources and baselines to create, implement and maintain a sustaining environment for the Project Management Organization (PMO). This also involves reviewing documentation, and working with key Project team members to assess and understand Project goals, scope, planning, constraints, success factors, Project organization, requirements, and analysis.

Vendor will provide project management services that utilize leading-practice methodologies, tools and processes to manage the Project, including plan management, issue resolution, change control, knowledge management, quality management and status reporting, and Project-specific coordination in support of developing the proposed phased Deliverables, including Steering Committee meeting presentations, team-level communications, and messages to be distributed throughout the organization. Deliverables for Project Management & Preparation are listed in Section 6.

2. **Business Process Review and Analysis:** The vendor will support NSD in reviewing current business processes and how they will be impacted by the selected system. The vendor will provide best practices and knowledge from previous implementations and work with NSD to ensure business processes work efficiently with the support of the new system.
3. **Organizational Change Management (OCM) and Training Support:** A critical component of the project will be effective organizational change management which includes thorough technical and end-user training, effective communication and successful stakeholder participation. The Vendor will work with NSD to develop an OCM plan and a comprehensive Training Program. This includes the development and execution of a communication plan, involvement in presentations, stakeholder forums, etc., and the development of a Training Plan, training curriculum and other training documentation, materials and media.
4. **SIS Requirements Validation & System Design:** This will involve the Vendor validating the requirements of the SIS with NSD and developing a system design to configure, customize or modify the system as required to meet these requirements. This stage will include the identification and design of Reports, Interfaces, Conversions, Enhancements and Forms (RICEF) objects required for deployment. It is NSD's intention to minimize any system modifications (software code changes). Customizations (additions to current code for report writing, new form fields, etc.) will be required to meet requirements.
5. **Solution Implementation:** Involves configuring, developing and installing the software, conversion tools, application interfaces, forms, required enhancements, system management, reports, workflows, system tests, quality assurance process and the like. Legacy data will be converted and migrated and the production system installed.

Test plans, test data, and cases will be developed and used throughout the testing process, including extensive integration testing to determine that in scope processes and systems are tested thoroughly in preparation for the Go-Live portion of the implementation phase.

This portion of the implementation phase also involves finalized end user training plans and materials. The Organizational Change Management and risk management plan is executed with extensive communications throughout NSD.

Vendor will lead configuration and implementation of business process requirements, conversion tools, interfaces with agreed upon systems and complementary products, and NSD external

applications, forms, workflows, system management, reports, enhancements, system tests, and quality assurance process as specified in the Deliverables for Implementation listed in Section 6.

Key Solution Implementation Deliverables are:

- Provision of Baseline SIS Software and Licenses
- Deployment of a fully configured, customized and modified SIS
- Deployment of a SIS that supports fully certified and operational Washington State Reports
- Functioning in-bound and out-bound interfaces
- Completed and migrated data from legacy systems (eSIS)
- Integrated third-party software if proposed

6. **Testing & Preparation for System Go-Live:** Involves planning and implementing final tests, end user training, cut-over activities, and readiness plans for go-live steps. Within this phase, the system integration testing is completed and in scope systems function correctly. Detailed transition and cutover plans are created and the production system is installed and configured with transports and data developed.

Vendor will lead planning and implementing the final tests, end user training, cut-over activities, and readiness plans for go-live steps as specified in the Deliverables for Preparation for System Go-live listed in Section 6.

Key Deployment Deliverables are:

- Conduct Unit and System Testing
- Conduct Integration Testing
- Conduct Volume/Stress Testing
- Support User Acceptance Testing
- Conduct Production Tests
- Complete Cutover to new software
- Conduct Training
- Conduct Project Close-out

7. **Go-Live and Deployment:** Involves moving the stage or “wave” of users for the initial Go-Live and functions from the pre-production environment to the live production environment. Vendor will move the stage or “wave” of users and functions for the initial Go-Live from the pre-production environment to the live production environment as specified in the Deliverables for Go-Live and Deployment listed in Section 6.
8. **Pre-Stabilization and Post Go-Live Assistance:** Involves support through completion of Stabilization, system monitoring, and optimizations as needed. Within this phase, the Project closes and support responsibility is passed to NSD’s Support Organization. Vendor will provide support through completion of stabilization, system monitoring, and optimizations as required by NSD’s Service Level Requirements (SLR). Refer to Section 4.9 — Service Level Requirements for detail.

4.1 High-level Implementation Timeline

The overall estimated high-level timeline for this implementation is as follows. The Vendor's work plan should take this overall timeframe into consideration only as guidance in the development of the proposed detailed work plan.

Task (For planning purposes only)	Start	Finish
SIS Implementation High-Level Estimated Timeline	4/1/2011	9/3/2012
SIS Vendor Selection and Contract Negotiations	4/1/2011	7/1/2011
Project Planning and System Design	7/4/2011	9/1/2011
Organization & Business Process Review	8/19/2011	9/15/2011
System Configuration & Installation	9/2/2011	10/28/2011
System Testing	10/17/2011	12/2/2011
Stakeholder Training	12/5/2011	9/3/2012
Parallel Production - For Enrollment & Registration	1/9/2012	6/1/2012
Cut-over to Final Production System	6/1/2012	6/1/2012

4.2 Organizational Scope

Organizational scope establishes the project's boundaries and identifies the departments and business units that will be impacted by the project. Approximately 5,000 total users will eventually become SIS end users.

For this Project, the following table lists current user counts and projected end users by building/program:

Table 1. Organizational Scope — In-Scope For this Project

School District Schools and Programs		Student Count	Approx. Current End Users
1.	Arrowhead Elementary	410	100
2.	Bear Creek Elementary	462	100
3.	Bothell High School	1573	250
4.	Canyon Creek Elementary	732	150
5.	Canyon Park Junior High	795	200
6.	Cottage Lake Elementary	341	100
7.	Crystal Springs Elementary	628	100
8.	East Ridge Elementary	338	100
9.	Fernwood Elementary	702	150
10.	Frank Love Elementary	628	150
11.	Hollywood Hill Elementary	370	100
12.	Inglemoor High School	1601	300
13.	Kenmore Elementary	503	150
14.	Kenmore Junior High	682	150
15.	Kokanee Elementary	663	150
16.	Leota Junior High	702	200
17.	Lockwood Elementary	532	100

School District Schools and Programs		Student Count	Approx. Current End Users
18.	Maywood Hills Elementary	578	150
19.	Moorlands Elementary	619	150
20.	Northshore Junior High	674	150
21.	Northshore Networks	130	150
22.	Northshore Online School (TAA)	33	100
23.	Secondary Academy For Success	125	150
24.	Shelton View Elementary	493	100
25.	Skyview Junior High School	946	200
26.	Sorenson Early Childhood Cntr	118	100
27.	Special Services	152	100
28.	Sunrise Elementary	298	100
29.	Timbercrest Junior High	834	200
30.	Wellington Elementary	550	150
31.	Westhill Elementary	478	150
32.	Woodin Elementary	571	150
33.	Woodinville Community Center	5	100
34.	Woodinville High School	1386	250
35.	Woodmoor Elementary	849	200
	Administrative	0	100
	Totals	20501	5300

4.3 Preliminary Business Process Scope

The following business processes identify the preliminary business process scope as of . The scope of the project reflects NSD's functional requirement categories that were used as the baseline for determining the project's business process scope.

- Student Data/Demographics
- Registration and Enrollment
- Attendance
- Scheduling
- Grades
- Transcripts
- Graduation Requirements
- Special Programs
- Special Education
- Student Behavior
- Student Health
- Fee Management
- Behavior Records
- Assessments
- Teacher Portal
- Parent and Student Portal
- Administrator Portal
- State Reporting

- Data Exchange with other system
- Custom Localizations

The final business process scope of the Project will consist of the processes defined within the Deliverables for the completion of the design milestone of the Project. Changes to the business process scope during the Implementation segment will be addressed in accordance with the change control procedures.

4.4 Technical Infrastructure

The Vendor will be required to oversee and support the configuration and tuning of the technical infrastructure components in support of the project. Examples of technical infrastructure topics include, but are not limited to the following:

Table 2. Current NSD Technical Infrastructure Components

Components	Description
Operating systems	The system software application and database servers run on industry standard 64-bit Operating systems running in Vmware vSphere 5 or later. Preferred: Debian Linux, Ubuntu Linux, Redhat Linux, Windows Server 2012 or later releases
Database products and tools	The system utilizes industry standard RDBMS platform which supports ANSI-SQL and ODBC connectivity Preferred (in order of preference): MySQL 5.6, PostgreSQL 9, MariaDB 10, SQL Server 2008 R2, Oracle 11g, or later versions of any
Security products and tools	Nessus
Network and system monitoring products and tools	Nagios, Whatsup Gold
Web servers	IIS, Apache, Tomcat

It is NSD's expectation that the proposed solution will be fully redundant in terms of hardware and software. Implementation design will take advantage of NSD's multiple internal data centers, application and database server clustering, session fail over, and hardware redundancy (i.e. multiple power supplies, RAID, multi-path SAN cards). At a minimum, there will be one database server and two application servers at each of two NSD data centers with additional hardware as deemed necessary by the vendor to meet SLA performance requirements.

4.5 Related Applications and Systems Planned for Decommissioning or Interfacing with the Student Information System Solution

Based on the preliminary application assessment conducted by NSD, the following are the current applications/systems that will be impacted by the new system. The Vendor is expected to provide recommendations for which of the following existing applications/software will best be interfaced or decommissioned/replaced by the SIS Solution.

Table 3. Systems For Replacement or Decommissioning

System/Application	Function
Administrative Assistants Ltd. eSIS	Current SIS

Table 4. Potential Systems For Interfacing to SIS

System/Application	Function
Mastery Manager Goldstar Learning	Provide for the ability to export out class rosters for Mastery Manager Goldstar learning, a student assessment system, and the ability to import assessments into the gradebook.
Business Plus SungardPS	Provide the ability to integrate with Business Plus SungardPS, our HR/Financial system, the ability to bring in staffing information, including SSN, employee ID, state ID, job role, qualifications, the ability to provide a batch of fees and payments for posting to the financial side.
Blackboard	Provide the ability to integrate with Blackboard, our virtual learning platform for rosters, as well as bringing grades into gradebook
Moodle	Provide the ability to integrate with Moodle, another Learning Management system used in the classroom, for rosters as well as grades into the gradebook.
Active Directory	Active directory (Windows Server 2008 functional level) with LDAPS support
eTriton - POS Food Service System	The ability to integrate with our POS food service system ,eTriton , pushing it demographic information and pulling Free and Reduced information.
Online Payment System	We currently have our own online payment system for both lunch accounts and fees. The integration needs to allow our online payment system to post fees and fee payment to the SIS.
Rubicon Atlas - Curriculum Mapping product.	Provide the ability to integrate with Rubicon Atlas, our curriculum Mapping product.
DIBELS Data System	Provide the ability to integrate with DIBELS Data System including providing rosters and importing of scores.

System/Application	Function
Thing Ed's School Center (our web content management system)	Provide the ability to integrate Thing Ed's School Center (our web content management system) with teachers' gradebooks.
AIMSWeb	Provide the ability to integrate AIMSWeb academic and behavior progress monitoring.
Reliance Communications School Messenger	Provide the ability to integrate with Reliance Communications School Messenger product which is BVUSD's stakeholder notification system (email, SMS, phone).
eInstruction's CPS and examview products	Provide the ability to integrate with eInstruction's CPS and examview products.
PlascoTrac	Provide the ability to integrate with PlascoTrac, a student pass tracking application.
Program application process	Provide the ability to import student course requests from our own program application process (using pupil number and course code)
SirsiDynix Symphony	Provide the ability to integrate with SirsiDynix Symphony, our library system, for demographic information as well as bringing in fees/fines.
SAS data warehouse	Provide the ability to integrate (at least push data) with SAS data warehouse.
Microsoft: SharePoint, BizTalk, Dynamics	Microsoft: SharePoint, BizTalk, Dynamics
Polar TriFit	Provide the ability to integrate with Polar TriFit a health management system used by our PE teachers.
Docufide - SReX	Provide the ability to integrate with Docufide for the Washington Statewide Electronic Transcript Initiative which was set up to streamline the exchange of K-12 student records and the transferring of high school transcript.

Table 5. External Interfaces with Other Systems

System/Application	Function
Petermann Ltd. Transportation System	Provide the ability to integrate with Petermann Ltd, our transportation company.
Standardized tests data Imports	Provide the ability to import in all Standardized tests (e.g. ACT, SAT, MAP etc.)
Washington State Department of Education's Systems	Required as part of certification
CTE	Provide the ability to import standards and indicators

4.6 Development Services

The Vendor may be asked to provide the following development services. These include, but are not limited to:

- **Data Conversions**

Assumptions: NSD expects to convert data from the current system “eSIS” into the Solution. There may also be district-specific data sources, such as spreadsheets and PC databases that will need to be converted or pre-populated into the Solution. The Vendor and NSD will further define the conversion criteria during project planning.

- **Interfaces**

Assumptions: The number of temporary interfaces will be dependent on NSD’s accepted roll-out strategy. The permanent interfaces will be related to our internal systems. As listed above.

- **Reports and Forms**

Assumptions: To the extent possible, NSD will use the out of the box reports for all functional areas. If delivered available reports do not meet the required business processes as determined by the project team, the Vendor may be asked to develop the reports and/or forms needed.

4.7 Process Workflows

The Vendor will be required to validate requirements and current manually-oriented process flows. In the new system, functions and workflows will be common, standardized and consistently used across all buildings and programs. The Vendor will be required to validate, refine, and take accountability for requirements and workflow development for the new system. It is anticipated that the quantity, quality, and specifications for functions and workflow will be further defined during the Requirements Analysis and Design phase.

4.8 Reporting & Regulatory Requirements

The Vendor will be required to consider a number of mandated and regulatory-related business requirements. Refer to Attachment A6 - Functional Requirements (MS-Excel).

4.9 Service Level Requirements

The Student Information System, once deployed and functioning in a production environment, must meet the following performance and availability requirements:

- SIS remains accessible to all end users 24x7
- SIS remains available to all end users in the event of failure of any one hardware component (server, network link, storage, processor, etc.).
- SIS must be made available to all end users within one hour or less of any event that takes one of NSD’s datacenters offline.
- SIS performance requirements at the screen level (for users) will be defined in the contract between the selected vendor and NSD and will be based upon industry-standards and benchmarked performance standards for that product as claimed in the company’s sales literature.

- System down time (for maintenance, upgrades or problem resolution) should be limited to non-working hours. The system must be easy to maintain and upgrade.
- Effective tutorials (training) and overall ease of use are required in order that users can logically resolve most problems (that are not system or hardware related) with relative ease without the need for external help.
- SIS should be able to completely function through both routine and extraordinary operational scenarios with only one System Administrator who can manage all anticipated functions. There will need to be redundancy in the position (i.e., at least one backup System Administrator who can assume the role in the absence of the designated SA) but the entire SIS System should only need one System Administrator available during normal working situations and conditions. If the system is hosted, this SA must be named.
- The SIS should be able to completely function through both routine and extraordinary operational scenarios with less than 1 FTE dedicated Data Base Administrator who can manage all anticipated functions. If the system is hosted the DBA must be named.
- The vendor will have available technical resources for District staff to contact regarding troubleshooting activities.
- The SIS should be user friendly to administer and must not require technical staff assigned in each building or program.
- The SIS must be capable of smoothly facilitating a rapid scale up in users both from a performance and maintainability perspective.

5.0 Roles & Responsibilities

The following Responsibility Assignment Matrix outlines the scope of work and high-level roles and responsibilities of both Vendor and NSD for the project.

NSD maintains full ownership of this project. However, the Vendor is the key player in this implementation and when Vendor is in the lead role for a particular task, the Vendor will provide leadership, direction and full accountability for the task and deliverables stated.

Activity Role Key:

- **R — Responsible:** Those who do the work to achieve the task. There is typically one role with a participation type of Responsible, although others can be delegated to assist in the work required.
- **A — Accountable:** (also Approver or final Approving authority): The party ultimately accountable for the correct and thorough completion of the deliverable or task, and the one to whom Responsible is accountable. In other words, an Accountable must sign off (Approve) on work that Responsible provides. There must be only one Accountable specified for each task or deliverable
- **C — Consulted:** Those whose opinions are sought; and with whom there is two-way communication.

- **I — Informed:** Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.

Table 6. Project Management & Preparation Roles & Responsibilities

Roles and Responsibilities	Vendor	NSD
Project Management		
Provide guidance for establishing the PMO, policies and standards	C	R
Define and provide the approach (e.g., governance, methodologies, etc.)	C	R
Developing risk management plan	C	R
Risk assessment	C	R
Risk management oversight	C	R
Ongoing monitoring of project risks	R	A
Risk mitigation strategies and actions	R	A
Roles and Responsibilities	Vendor	NSD
Project Preparation		
Develop project goals and objectives, aligned to NSD strategy	I	R
Review and approve the scope of implementation	I	R
Establish the project structure and steering committees	I	R
Develop project charter	I	R
Define implementation strategy	C	R
Define the overall project schedule and implementation sequence	C	R
Define appropriate project standards and procedures	C	R
Approve appropriate project standards and procedures	I	R
Conduct technical and business planning sessions to establish and communicate standards and decisions, driven by the project initiative, in the key architecture areas (e.g., application, data, security, integration)	C	R
Develop the system landscape required for an implementation and ongoing operation of the implemented solution.	C	R
Develop initial business process change plan and change imperative statement	C	R
Approve design specifications standards and methodologies	C	R
Review and approve the initial Core Project Team training	C	R
Develop and implement a methodology for measurement of post-implementation benefits. This includes providing the tools for the collection of baseline data as well as post-implementation data.	C	R
Review and approve final project prep activities	I	R

Table 7. Requirements Analysis & System Design

Roles and Responsibilities	Vendor	NSD
Requirements Analysis & System Design		
Conducting interviews, group workshops and surveys	C	R
Facilitating consensus with NSD requirements groups and representative stakeholders	C	R
Validating requirements defined to date	C	R
Developing functional requirements documents and related data definitions and information flows that are required to supplement Student Information System documentation	C	R
Developing business rule descriptions and required documentation to help drive SIS configuration activities and facilitate knowledge transfer to NSD	C	R
Developing technical requirements documents to describe platform, architecture, and integration requirements for related solution components that are required to supplement software or hardware vendor documentation	C	R
Performing preliminary configuration to effectively align business processes where required	C	R
Defining end user training strategy	C	R
Defining organizational alignment and action/sponsorship plans	C	R
Organizational risk assessment based on defined approach and plan	C	R
Creating design documentation that specifies all solution application footprint components, project modules, data flows, interface components and associated operations procedures for the solution environment	C	R
Creating design documentation that specifies SIS configuration choices and recommended options according to the consensus business rules developed during the requirements definition	C	R
Creating design documentation to account for interdependent requirements from other NSD application or business process initiatives	C	R
Contributing current state business process and data-related technical knowledge materials and subject matter personnel to complete design specification documents and deliverables	C	R
Providing assistance, expertise, and resources to NSD in developing and gathering current state business process and data-related technical knowledge materials and subject matter personnel to complete design specification documents and deliverables	C	R
Contributing future state business process and technical knowledge and subject matter personnel who understand how the SIS solution can best be designed to improve business processes and achieve business benefits	C	R
Facilitating interviews, group workshops and surveys to obtain and gain consensus on design input	C	R

Roles and Responsibilities	Vendor	NSD
Designing solution technical environment through a technology plan based on NSD standards, architecture and project initiatives	C	R
Authorizing and approving technology plan through coordination with the appropriate NSD technology standards group or advisors	C	R
Defining SIS configuration and development standards and methodologies	C	R
Developing security and authorization requirements	C	R
Approving requirements definition documents and deliverables	I	R
Confirming that the Solution can technically and functionally support the design specification documents and deliverables	R	A
Approving design specifications documents and deliverables	I	R
Refining Project Plan components (Risk, Change Management, Data Conversion, Quality, etc.)	C	R
Installing the Solution system development, test, and training hardware and software in the appropriate facilities necessary to support the application development/configuration, integration and testing platform requirements, including any elements required for supporting any new or enhanced functions or features	C	R
Planning for data readiness activities	C	R
Developing a Data Identification, Conversion, and Migration Strategy	C	R

Table 8. Student Information System Environment

Roles and Responsibilities	Vendor	NSD
Acquisition		
Determining Bill of Material for all required purchases	R	A
Purchasing/procuring all computer hardware and systems software required to establish an application integration and testing environment to meet NSD requirements.	C	R
Identifying all software licenses for any required software development tools, application programming and testing platforms, database software, application and Web server operating platforms, and any other software that is required to establish the necessary application integration and testing environment and ongoing production environment appropriate to meet NSD requirements	C	R
Purchasing/procuring all software licenses for any required software development tools, application programming and testing platforms, database software, application and Web server operating platforms, and any other software that is required to establish the necessary application integration and testing environment and ongoing production environment appropriate to meet NSD requirements	C	R
Setting IT and architectural standards and related acquisition policies and procedures	C	R
Conducting the necessary validation process required to ensure compliance to the Solution criteria for successful implementation.	R	A

Roles and Responsibilities	Vendor	NSD
Ensuring that all activities comply with the SIS Solution standards for the respective software release.	R	A
Complying with best practices IT standards and architectures and NSD acceptance processes	R	A
Approving all funding and acquisitions	I	R

Table 9. System Configuration, Development & Data Conversion

Roles and Responsibilities	Vendor	NSD
Setting up enterprise wide user roles and authorizations	C	R
Conduct data cleanup	C	R
Developing functional requirements documents and related data definitions and information flows that are required to supplement the SIS documentation	C	R
Coding of automated data conversions mapping, and loads into the SIS, using best practices tools and techniques that are consistent with the SIS provided architecture and development standards	C	R
Defining the SIS data warehouse and data model/requirement standards and methodologies (assumes use of standard, out-of-box reports)	C	R
Installing the SIS Infrastructure environment	C	R
Configuring baseline SIS	C	R
Coding interfaces with the SIS	C	R
Code custom localizations with the SIS	C	R
Coding enhancements to the SIS	R	R
Defining best practice tools and techniques wherever applicable	R	A
Coding automated data conversion loads into the SIS	C	R
Coordinating and executing manual data loads to the SIS	C	R
Verifying results of data loads to the SIS	C	R
Facilitating and leading configuration and development reviews	R	A
Establishing the overall parameters for standards, policies, and procedures for all integration and testing activities	C	R
Establishing SIS product-specific standards, methodologies, and tools for all integration and testing activities	R	A
Establishing SIS data and information management standards, methodologies, and tools to support integration and testing activities	C	R
Creating integration (end-to-end), user acceptance, stress and regression test plans that are fully documented and repeatable	R	A
Performing all appropriate life cycle testing (e.g., end-to-end testing, stress testing, regression testing, etc.)	R	A

Roles and Responsibilities	Vendor	NSD
Developing test data	C	R
Providing best practices to stage systems before production turn-over	R	A
Providing performance tuning of the SIS	R	A
Managing the operational facilities and overall test environment	C	R
Developing technical requirements documents to describe platform, architecture, and integration requirements	R	A
Establishing initial cutover and go-live plan	C	R
Conducting testing reviews and monitor/track issues, providing written results to NSD	R	A
Providing NSD subject matter expertise for development and testing	I	R

Table 10. Testing & Preparation for Solution Go-Live

Roles and Responsibilities	Vendor	NSD
Defining deployment criteria and delivery requirements	C	R
Performing data migration from existing systems to new systems, by either electronic or manual methods and performing selected integration and stress testing to validate that the solution is ready for production	C	R
Developing site-specific transition plans that encompass business process, operations, and organization alignment (Business and IT)	C	R
Finalizing risk management plan	R	A
Establishing ongoing production Support organization (IT and Business)	C	R
Delivering site-specific system and user documentation	R	C
Conducting pre-installation site surveys to assess site readiness against a set of best practices checklist criteria	R	A
Reviewing readiness of cutover deliverables	C	R
Training and Change Management activities to ensure NSD Readiness	C	R
Completing final installation of SIS and non-SIS infrastructure	C	R
Migrating data from existing systems to new SIS	C	R
Conduct system performance and load testing	R	A
Performing user acceptance testing to validate that the SIS is ready for production	C	R
Approving and sign-off on all site-specific migrated data	I	R
Coordinating deployment and support activities with NSD and site management teams	C	R
Conducting post-implementation acceptance tests	I	R
Reviewing/approving post-implementation acceptance test results	I	R
Approving production implementation “Go/No-go” decisions	C	R

Table 11. Migration & Support

Roles and Responsibilities	Vendor	NSD
System fixes to correct system level performance problems	R	A
Data fixes to correct improperly converted files or tables	C	R
Data fixes to correct translation or load errors for interfaces	C	R
Data fixes to correct update errors from application configuration or parameter table settings that are not consistent with the intended design	C	R
Training fixes to correct interpretation and documentation errors related to user or technical training documentation or other training delivery media.	C	R
Performing appropriate shutdown activities for converted systems	C	R
Conducting Lessons Learned activities	R	C
Implementing support organization transition	C	R
Updating all documents associated with the Warranty Service fixes, as defined in the migration and support section of the SOW	R	A
Providing personnel to manage Warranty Service requests and related tracking through resolution and sign-off	R	C
Approving all Warranty Service fixes with formal sign-off	I	R
Providing help desk management personnel to approve the transition plan and to accept responsibility for ongoing applications maintenance services that will be provided by the appropriate party	I	R
Providing business and data management liaison personnel to approve the transition plan and to accept responsibility for ongoing relationship management of the vendor-provided help desk and overall application management services, if applicable	I	R

Table 12. Organizational Change Management

Roles and Responsibilities	Vendor	NSD
Training and Organization Change Management (OCM)		
Training and Change Management Strategy & Objectives	R	A
Developing training plan, material, logistics and schedule	C	R
Change Management Training/Knowledge Transfer	C	R
Executing Training and OCM plan	C	R
Audience/Trainee Analysis	C	R
Technical Administrator Training	R	A
Super User Training	R	C
Process/Module Owner Training	C	R
Train the trainer approach	C	R

Roles and Responsibilities	Vendor	NSD
Communication Process	I	R
Key Messages	C	R
Communication Vehicles	C	R
Communication Schedule/Frequency	C	R
Change Management Metrics	R	A
Organizational Transition (e.g., training, new process flows, reclassification,)	C	R

Table 13. Third Party Products

Roles and Responsibilities	Vendor	NSD
If the Solution includes an API, the vendor will provide specifications and assurances the API will function as documented	R	C
Defining business requirements, developing design and implementing end-to-end business processes using the Solution and Third Party software	C	R
Developing/providing training and knowledge transfer to NSD in order to properly configure, support, and maintain Third Party software	C	R
Configuring the Solution to integrate with Third Party software	C	R
Providing testing and integration services required on Third Party software implementation	C	R
Performing go-live to production	C	R

Table 14. Compliance & Regulations

Roles and Responsibilities	Vendor	NSD
Compliance and Regulations		
Assessing the SIS for all regulatory mandates affecting NSD	C	R
Documenting service-level objectives and requirements	R	A
Defining and approving overall operations and administration policies	C	R
Defining and approving overall technical support policies and procedures	C	R
Providing recommendations to comply with regulatory and compliance requirements	C	R
Approving recommendations	I	R

6.0 Deliverables

NSD expects Vendor to provide project leadership, oversight, direction and full accountability for Vendor contributions to the creation of deliverables.

A complete list of deliverables will be inserted in this section based on results of the negotiation process between selected Vendor and NSD. The final deliverables included within the design phase will set forth

an updated list of deliverables for the remainder of the Project based upon the Vendor's methodology. The Vendor will create or implement, in all material respects, the deliverables (or portions of the deliverables) for which it is assigned responsibility in accordance with such specifications, criteria, and descriptions. NSD reserves the right for review and modification of each of these deliverables.

For repeated deliverables, Vendor will provide NSD with approach documentation and templates at least two weeks prior to the initiation of work on these Deliverables.

A preliminary list of deliverables is as follows:

- Project Scope
- Project Work Plan and Timeline
- Resource Plan and Vendor and NSD Staff Roles & Responsibilities
- Project Organization Structure
- Communication Plan
- Risk Identification and Mitigation Plan
- Implementation Strategy
- Testing Strategy
- Project Status Reporting
- Training Requirements Analysis, Plan, Materials, Curriculum and Execution
- Business Process Analysis
- Functional/Application Requirements and Requirements Traceability Matrix
- Fit/Gap Analysis
- End Solution Design, Configuration, Customization and Modifications Plan and Documentation
- System Interface Design
- Change Control Process
- RICEF (Reports, Interfaces, Conversions, Enhancements, Forms)
- Technical Environment Documentation
- Updated Project Plan
- Test Data and Configuration
- Data Conversion and Migration Plan

- Testing and Staging Environment
- Production Environment
- Performance & Stress Tests
- User Acceptance Test Plan
- Deployment and Cutover Plan and Execution
- Complete Technical System Documentation
- Complete System User Documentation
- Technical Support Plan
- End User Support Plan
- System Maintenance and Upgrade Plans

6.1 Acceptance of Deliverables

At the beginning of a milestone, the project team will determine which deliverables are subject to approval and will develop appropriate acceptance criteria. Both NSD and Vendor Project Managers or their designees shall review those Deliverables which have been identified for approval within five (5) Business Days after receipt of a Deliverable from Vendor and ten (10) Business Days in the case of a final draft or version of a Deliverable. The NSD Project Manager or designee shall notify the Vendor Project Manager and assigned Project Team resources in writing as to any specific changes requested (together with a reasonably detailed explanation of the reasons why the Deliverable should be modified). Failure to give such notice within the required time period shall be deemed to mean that the Deliverable is accepted. The assigned Project Team resources shall make all agreed changes described in the notice at the earliest appropriate date so as to not materially adversely impact the schedule under the Project Schedule and, upon completion of such changes to NSD's reasonable satisfaction, the Deliverable shall be deemed accepted.

7.0 Project Milestones

Project milestones will be defined as shown in table below and will be deemed achieved after the Deliverables for such Project Milestones have been accepted (or the Project Managers have agreed that any un-accepted Deliverables can be finalized and accepted as part of a later Project Milestone) and the activities and tasks identified in the Project Schedule as necessary to complete such Project Milestone have been completed. Promptly after notice from either Project Manager that a Project Milestone has been achieved, the Project Managers will advise the Project Governance team of such and, if requested, review the status of the Project.

Table 15. Project Milestones

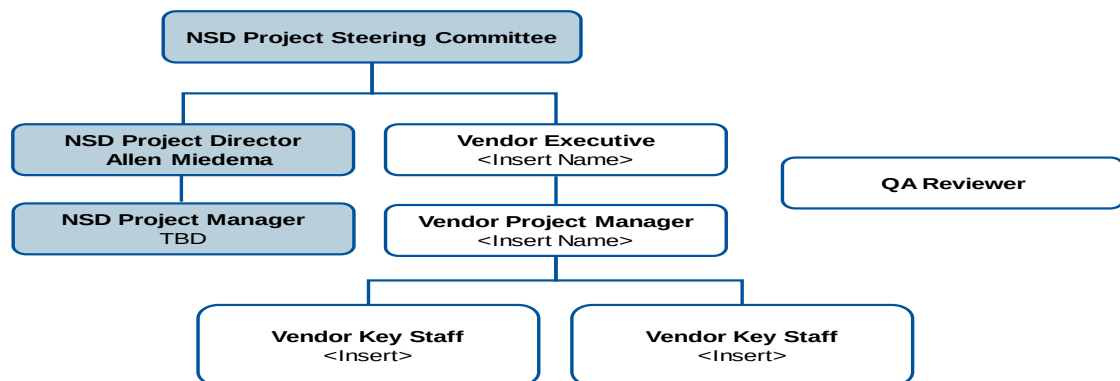
Vendor should complete the following chart based the proposed Project Plan, Deliverables and Milestones (as described in the Vendor Response Document) based on the understanding of the project as of the vendor response submission date and will be finalized at contract negotiation

Milestones	Milestone Criteria/Checkpoints	Deliverables	Estimated Completion Date

8.0 Project Resources

For the purposes of this SOW, the Project consists of NSD resources and Vendor resources described below. Staffing plan and changes to the staffing plan will be managed under the Change Control Procedures. Vendor and NSD will staff the Project as provided in the staffing plan to perform the activities and develop the Deliverables outlined in this SOW.

The NSD project organization structure is designed to empower the NSD project team to the greatest extent possible. Refer to Figure 1. NSD Project Organization below. The majority of project related decisions will be made by the Project core teams. Strategic decisions and major project directional decisions will be made at the higher levels. Refer to Table 18. NSD Project Team Profile for description.

Figure 1. NSD Project Organization

The following Table describes the primary NSD resources that will be part of the overall project team and report to the NSD Project Manager. Additionally, there will be several secondary resources (part time business and technical resources available — not listed below) on an “as needed” basis at the discretion of the NSD PM. All requests for additional NSD resources (part time or full time) will be channeled through the NSD PM.

Table 16. NSD Project Team Profile

#	Role	Description	Type
1	NSD Project Director	Coordinates reporting Project status to the project Steering Committee, oversees budget, directs the activities of the project manager, holds the team accountable.	Business
2	NSD Project Manager	Responsible for overall Project management and coordination between the Vendor and NSD resources.	Business
3	Business Analysts	Manager, Deployment and Training Primary link into the specific business area. Responsibilities include: - Assists in the development and execution of stakeholder engagement plans for the project. - Owns the business case for the deployment area. - Participates and acts as a subject matter expert (SME) during detailed design and approves any recommendations for changes in the original design - Ensures business readiness for Go-Live - Performs functional tests of the system from several perspectives: end user, power user and interface operation.	Business
4	Trainers	Application Systems Trainer responsible to provide user training and to train the district resource that will train end users (employees)	Business
5	System Administrator	Maintains and operates the system installing, supporting and maintaining servers. Responds to outages and other problems	Technical
6	Director Network Services	Directs the work of the system administrators.	Technical
7	System Analysts	Insures data integrity, supports interface transaction. Designs and maintains the interface between the third party software and current SIS. Develop and execute data extracts, transformations and loads into the SIS	Technical

8.1 Vendor Project Team Resources

Oversight/Quality Assurance

Vendor will maintain a team of senior IT and business professionals to monitor Vendor's performance under this SOW and communicate such findings to the Project Governance Board.

Team Structure and Roles

Vendor shall provide the Project Team members identified in Vendor's proposed staffing plan, as completed in Attachment A4 - Proposed Solution & Staffing Plan (MS-Excel). Such Project Team members shall (a) perform the roles, responsibilities and activities described the project staffing plan as the same may be modified and prioritized during the Project and (b) create or assist in creating the Deliverables for which they are assigned sole or shared responsibility.

- Project Director — Vendor Project Director will be Vendor's primary point of contact for all matters relating to this SOW. In addition to other requirements that may be set forth in the Contract or this SOW, the Project Director shall be: (a) knowledgeable about the Services and each of Vendor's and its subcontractors' products and services; and (b) experienced at running projects of a size and scope comparable in size and scope to that of the Project. The individual selected for this SOW is set forth in the final Project Organization & Governance.
- Project Manager — Vendor will designate one individual to manage the day-to-day delivery of Services. The individual selected for this SOW is set forth in the final Project Organization & Governance.
- Work-Stream/Function Lead(s) — Vendor will designate individuals to serve as leaders of each of the work-streams or process areas as set forth in the final Project Organization & Governance
- Vendor Principals, Directors, Senior Managers and Managers — NSD has the right to review resumes and conduct phone or in-person interviews with any Partners, Principals, Directors, Senior Managers and Managers in key roles (as determined by the NSD and Vendor Project Management Leads) proposed for staffing on this SOW.

Subject Matter Experts (SMEs)

- Vendor will make reasonable efforts to provide SMEs available to NSD, as requested, on a timely basis.

Holiday Schedule

- Vendor will adjust its holiday schedule applicable to its resources performing Services under this SOW to be consistent with NSD's so as to minimize the impact on the Project.

Additional Vendor Responsibilities Regarding Vendor Project Team Members:

- Vendor shall identify and allocate its Project Team members in a timely manner to support adherence to the Project dates.
- Vendor Project Team members shall be capable and competent.

- Subject to the Change Control Procedures established, Vendor shall deploy any additional required Project Team members required for the performance of the Services.

9.0 Payments & Incentives

- Professional fees associated with the Services to be performed under this SOW will be on a Fixed Fee basis.
- The Fixed Fee is based on the nature and scope of the work, the expected resource requirements, resource commitments from NSD, the anticipated duration and scope of the Project, and a set of Project Assumptions, all as described elsewhere in this SOW.
- NSD reserves the right to renegotiate the implementation/deployment and post implementation phases at the completion of the Design/Configuration Phase.
- Vendor shall submit invoices for professional services according to the milestone invoice schedule to be set forth during contract negotiations.

STUDENT INFORMATION SYSTEM

ATTACHMENT A

CERTIFICATION

Pursuant to and in compliance with this Request for Proposal and all documents relating thereto, the undersigned hereby offers to furnish and deliver any or all of the articles enumerated at the prices quoted herein.

Organization Information

Legal Firm Name _____

Printed Name and Title

Authorized Signature

Address

City, State, Zip Code

Telephone

Fax Number

Email Address

Dated

Acknowledge receipt of addendum # _____ through _____.

	Response
SIS Proposing VENDOR NAME	
Vendor Company Headquarter Address and Telephone Number	
Total Revenue in 2012	
% of revenue from clients in K-12 Education.	
% of revenue from K-12 Student Information Systems	
% of revenue from Other Solutions	
Please attached Audited Financial Statements	
Number of Service Delivery Employees	
Number of Employees providing Integration Services	
List of Locations in North America	
List of Locations in Other Geographies	
Vendor's Staff Primary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	
Vendor's Staff Secondary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	

	Reference 1 (Required)	Reference 2 (Required)	Reference 3 (Required)
School District Name (Reference)			
Version of Proposed SIS Solution Implemented			
Scope of Services Provided			
Contract Size (\$) Estimate			
Project Start Date			
Project Completion Date (if in progress, state expected Completion Date)			
Contract Term			
Reference Contact Name and Title			
Reference Contact Telephone Number			
Reference Contact Address			
Reference Contact E-mail			

Names of Vendor's Manager and Project Manager			

Reference 4	Reference 5	Reference 6

	Subcontractor 1	Subcontractor 2
SUBCONTRACTOR NAME		
Type of Legal Entity		
Company ownership (i.e., private/public, joint venture)		
Jurisdiction of Company Formation		
Headquarters Location		
Date Founded		
Number of employees		
Audited financial statements (last three years)		
Proposed Products or Services to be provided		
Experience of subcontractor in performing the services to be provided		
Brief description and number of projects that Implementation Partner has partnered with this subcontractor		
Locations where work to be performed		

Subcontractor 3

	Project 1 (Required)	Project 2 (Required)	Project 3 (Required)
School District			
Scope of Services Provided			
Version of Proposed Solution Implemented			
Contract Size (\$) Estimate			
Project Start Date			
Project End Date (if in progress, state expected End Date)			
Contract Term			
Contact Name and Title			
Contact Telephone Number			
Contact Address			
Contact E-mail			

Names of Vendor Engagement Manager and Project Manager			

Project 4	Project 5

	Previous Client 1	Previous Client 2	Previous Client 3
School District			
Scope of Services Provided			
Version of Proposed Solution Implemented			
Contract Size (\$) Estimate			
Project Start Date			
Project Stop			
Contract Term			
Contact Name and Title			
Contact Telephone Number			
Contact Address			

STUDENT INFORMATION SYSTEM

ATTACHMENT C

COOPERATIVE PURCHASING INFORMATION

In the event another area school district or public entity has the need for the same product or services, they may wish to utilize another executed bid in the area. RCW 39.34 allows cooperative purchasing between public agencies in the State of Washington. Public agencies that have, or in the future file an Interlocal Cooperative Purchasing Agreement with the District may purchase from the District's contracts, provided that the Bidder has agreed to such participation.

Each school district or public entity would act as an independent agency and take responsibility for its own purchase orders, payment procedures, evaluations, and scheduling of Bidder's services. Each entity will also take responsibility for performance of any purchasing contract with Bidder. The District will not have any responsibility or liability for orders issued by other public agencies utilizing the District's contract through an Interlocal Agreement.

Bidders' responses to allow cooperative purchasing will not have any weight in the evaluation process for this request for proposal nor will they be evaluated negatively if they choose to not participate in an Interlocal Agreement.

Each Bidder shall indicate on this form whether it will honor the pricing and terms and conditions to other public agencies in accordance with this Agreement's terms and conditions.

As per the terms and conditions of this contract, will the Bidder allow public agencies in addition to Northshore School District to purchase from this contract?

Yes _____ No _____(check one)

If yes, Bidder will have opportunity to review ability to perform/deliver to requesting agencies prior to commencement of services.

Vendor Proposed Staffing Plan

Instructions: Vendor shall provide number of FTEs based on proposed approach. This should tie in with Cost Proposal FTEs from Cost Proposal Worksheet (Excel). Vendor must modify/add similar sheets as necessary or applicable and indicate any off-shore staffing.

Please format spreadsheet to meet space requirements.

Project Wave				2013				
				Mo 1	Mo 2	Mo 3	Mo 4	Etc.
Project Management & Preparation								
Requirements Analysis & Design								
Solution Implementation								
Testing & Preparation for System Go-Live								
Go-Live & Deployment								
Pre-Stabilitation & Post Go-Live Support								
Organizational Change Management Support								
VENDOR STAFFING								
	Team	Project Role	Rate per Hour	Mo 1	Mo 2	Mo 3	Mo 4	Etc.
Project Planning								
<i>SAMPLE ORG LEVELS ONLY. Insert Org Levels below and should correspond with proposed org levels and rate cards in Cost Proposal.</i>								
Partner				0	0	0	0	
Director				0	0	0	0	
Senior Manager				0	0	0	0	
Experienced Manager				0	0	0	0	
Manager				0	0	0	0	
Experienced Consultant				0	0	0	0	
Consultant				0	0	0	0	
Experienced Analyst				0	0	0	0	
Business Analyst				0	0	0	0	
Project Management								

Apply corresponding color scheme here based on proposed time

Project Wave				2013				
				Mo 1	Mo 2	Mo 3	Mo 4	Etc.
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Functional Areas and Solutions								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Technical Areas and Solution								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Deployment and Support								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	

kbook (MS-

2014				
Mo 1	Mo 2	Mo 3	Mo 4	Etc.

shades on left column
frames.

Mo 1	Mo 2	Mo 3	Mo 4	Etc.
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

Staffing Plan

A5_NSD_Proposed_Solution_and_Staffing.xlsx

11/27/2018

2014				
Mo 1	Mo 2	Mo 3	Mo 4	Etc.
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

Please format spreadsheet to meet space requirements.

Proposed Software Solution					
List all item software included and necessary to operate the proposed Student Information System solution. List should match cost proposal line items. Note: Add more lines as necessary.					
Item #	Required/Optional	Core Package Name	Module/Application Name	Version/Release	Operational/ Included in Proposal and Can be demonstrated to District (Y/N)
1					

Proposed System Software					
List all item system software included and necessary to operate the proposed Student Information System solution. Note: Add lines as necessary.					
Item #	Component	Specification	Qty *	Use (e.g., Development, Testing, Training, Production, etc.)	Included in Proposal or Optional?
1					

Notes:

* Include number of licenses, seats, etc., depending on licensing methodology
Add more lines as necessary; this should match cost proposal line items

Proposed Supplemental Software	
Provide complete description of any supplemental software/products required for proposed solution. Supplemental components may include developer optional in order to meet BVSD requirements. Note: Add more lines as necessary.	

Item #	Supplemental Package Name	Description of Business Requirement/Purpose	Required or Optional?	Qty	Use
1					

tion System solution.
essary.

Proposed No. of Licenses	Date First Installed	Installed Sites (or Indicate Client Reference)

at tools, configuration management tools, etc., required or

Most Recent Installation Date	Installed Site(s) or Client Reference

Please format spreadsheet to meet space requirements.

Summary of Recommended Hardware				
Recommend all hardware infrastructure necessary to ensure successful implementation and on-going operation of proposed solution for a minimum of one year following completion of implementation. Note: Add more lines as necessary.				
Item #	Component	Specification	Qty	Use (e.g., Development, Testing, Training, Production, etc.)
	Servers			
	Network Components			
	Other (specify)			

Response Instructions to Functional Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	~~Requirement will be met through changes to the existing reports or programs. This would include custom code developed to~~ perform specific functions or validations outside the standard code. Include the creation of a new report, query of workflow that does not exist within the current solution. Note: In the Comments column next to this response, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Modification	M	Requirement will be met through changes to the source code which would require analysis and re-application during future updates, upgrades, or when applying software patches.
Supplied by Third Party	3	Requirement will be met by third-party software package and is included in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.
Note:		
1. An omitted response will be assumed to be the same as a response code of "N". 2. Any deviation from the response codes will be re-coded at the discretion of NSD.		

In this Worksheet there are 18 Tabs. Each must be completed with codes above.

- 1 Mandatory Requirements
- 2 General Functional Requirements
- 3 Registrations

- 4 Attendance
- 5 Scheduling
- 6 Grading
- 7 Transcripts
- 8 Graduation Requirements
- 9 Special Programs
- 10 Special Education
- 11 Student Behavior
- 12 Student Health
- 13 Fines and Fees
- 14 Assessments
- 15 Administrator Portal
- 16 Teacher Portal
- 17 Parent - Student Portal
- 18 State Reporting

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Mandatory Requirements		Y	C	M	F	3	N	
1	The solution the Vendor is proposing must have been used and responsible for a successful installation for state reporting with full operation for the relevant data file for the 2010-2011 school year. The school district using the system must have had a student enrollment of comparable size to the District.	Mandatory							
2	Vendor must have been in business for at least 5 years and must be able to provide evidence of active installations, including at least one in a school district of comparable size of the District.	Mandatory							
3	The application software must be a web-based solution specifically developed to run in the Web environment. This means that all of its functionality must be accessible via a Web browser.	Mandatory							
4	The Vendor and the software must support for the latest Standards-Compliant Browsers.	Mandatory							
5	The solution provides a district-wide database for all student information with access to the historical as well as the current school year's data.	Mandatory							
6	The application must be in compliance with the Schools Interoperability Framework (i.e. SIF 2.X certified) and support interoperability with MS SharePoint and Learning Management Systems like Blackboard and Moodle.)	Mandatory							
7	The proposing vendor must be the Prime Contractor, responsible for all applications (including third-party components) and be the point of contact for all implementation, support, and training services.	Mandatory							
8	The vendor's licensing agreement must allow for the granting of a perpetual license for the use of their software.	Mandatory							
9	The system must have multi-user capabilities so as to allow multiple users access to the application at the same time.	Mandatory							
10	The vendor must have the capability to provide for custom changes or additions to the software to accommodate the business practices for the District.	Mandatory							
11	The vendor must have the capability to update and maintain the software for Federal, State Department of Education and the District's reporting compliance and accomplish this in a timely manner.	Mandatory							
12	The vendor must describe a project approach and propose a project manager for this project and the project manager is expected to be onsite during critical parts of the project as defined by the District.	Mandatory							
13	Users have access to the entry of next year data and to perform the next year scheduling activities.	Mandatory							
14	The application software must be designed for on-line, real time processing.	Mandatory							
15	Solution must provide an integrated report writer that provides ad hoc capabilities to end users with the ability to extract data out. The report writer functions should also provide the ability to limit (i.e., allow or prevent) access to student information based on the appropriate security.	Mandatory							
16	The district must have the ability to restrict access to confidential fields to only those users with the proper security by role-based and/or individual user (for example: social security number for students and teachers, state id numbers, prior state id numbers, student economic status, etc.)	Mandatory							
17	The user interface must provide field level validations as the users are entering data into fields on a given page as needed.	Mandatory							

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18	The system should allow single update access but simultaneous multiple inquiry access. For example, two people should be able to view the same screen at the same time, but only one should be able to make changes. System should support large scale concurrent usage.	Mandatory							
19	The system's web screen design should conform to the standards for the Americans with Disabilities Act (Section 508).	Mandatory							

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#	General Functional Requirements	Priority	Y	C	M	F	3	N	
1	The system provides a consistent user interface to include screen layouts, report layouts, messages, field labels and date display.	High							
2	The system provides access to on-line help regarding screen or field description and its intended use. The help should include warnings, examples and error messages when appropriate. Allow the ability to customize the help with district specific items.	High							
3	The system shall provide, where appropriate, default values for fields.	High							
4	The system provides the ability to modify existing default values.	High							
5	The system provides utilities and/or tools for importing and exporting database data.	High							
6	The system provides the ability for 5000 employees to have concurrent access to the system.	High							
7	The system provides the capacity to support access for over 30,000 students and parents	High							
8	The system provides the ability for data input via multiple devices to include, but not limited to keyboard and mouse, scanners , and mobile devices.	High							
9	The system provides the ability to utilize multiple types of printers to include, but not limited to inkjet, laser, and plotters.	High							
10	The software shall be user friendly and operate in a manner in which school personnel follow in their daily positions.	High							
11	The reports must be easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report) and exported to a file.	High							
12	All reports must have extensive flexibility in the order the standard report information appears.	High							
13	The system provides a consistent user-interface, with similar front-end questions prior to producing a report.	High							
14	The application should provide for on-line notepad type features that allow the user to freely input narrative data.	High							
15	The system provides a comprehensive reporting tools that allows all data within the system to be reported with any other piece of data within any of the other software modules proposed.	High							
16	The size of the database must have the capability to maintain the legal retention schedule for records of public school districts (e.g. save grades 09-12 transcripts permanently, attendance records for 5 years, etc.)	High							
17	The system allows all reports to be viewed, printed, and saved via Adobe Acrobat. (PDF format)	High							
18	The system provides for multiple environments (i.e. for live, testing, training and development).	High							
19	The system provides for data entry assistance by providing pull-down lists to help user select valid codes for fields where this would be applicable.	High							
20	The system provides online help that pertains to the screen and field being accessed. The help should include warnings, examples, and meaningful error messages when appropriate.	High							
21	The system provides for easy addition of district-defined screens along with their field definitions. The authorized user may define field description, data type, data length, help text, default value, and validation tables. These fields are available for searches, for reporting and program tracking.	High							
22	The system provides basic report writer capabilities to access student information in a variety of formats such as PDF, Excel, txt, or csv format. The user may display the report to the screen, print to printer, import to Excel, send via email, or store it on disk.	High							
23	The system should allow for mass updates to certain fields (to make replacements directly in database) so that quick updates can be made by properly authorized system users.	High							

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24	The system provides adequate security access to data-altering utilities and editors to authorized personnel only.	High							
25	The system provides security in such a way that users only see only the menu options for which they have been authorized.	High							
26	The system allows each user to define their own favorite menu options to facilitate efficient access to menu options.	High							
27	The system allows query results to be saved to a Microsoft Excel spreadsheet.	High							
28	The system allows the individual users to have an initial page tailored to their individual needs, with access to favorites, scheduled tasks, completed tasks, and reports, etc.	High							
29	The application should provide for on-line notepad type features that allow the user to freely input narrative data.	High							
30	The system provides error messages in a consistent format across all system modules, for both batch and online processing. Specifically, error messages have like codes, text, and screen locations.	High							
31	The content of error messages should be customizable to be district-relevant and enhance the meaning of the message and direction provided to the user.	High							
32	The system provides error messages that are integrated with the online help function. For example, the data entry person should be able to click on an error message and open the online help document to the appropriate page.	High							
33	The system should provide online help features for all screen elements (fields and screen error codes) explained in plain English.	High							
34	The system provides the ability to add sound effect to error display.	High							
35	The system provides spell checking for all free text fields.	High							
36	The system allows validation tables to be maintained as specifications change. Obsolete values may be flagged as "Inactive" so that historical data integrity is maintained.	High							
37	The system allows dates to be entered in a variety of formats throughout the system, with or without using a pop-up calendar.	High							
38	The system allows during data entry, for users to be able to utilize recurring data entry tools including templates, copy and paste functionality.	High							
39	The system allows menus to be defined by administrative personnel to meet the needs of an individual user.	High							
40	Users can search and report data by using drop-down options that include comparison operators such as: = (equal to), < (less than), > (greater than), <= (less than or equal to), <> (not equal to), : (range), and * (wildcard).	High							
41	The system allows the user to query on any field in the SIS database for which he/she has been authorized.	High							
42	The system provides a menu crumb trail to facilitate navigation to all options of the system.	High							
43	The system must provide a consistent user interface. This includes screen layouts, report layouts, messages, field labels, and date displays.	High							
44	The system groups screens logically by function to facilitate data entry.	High							
45	The system should have the ability for a user to concurrently open multiple sessions/windows for both inquiry and updating with access to any combination of application modules, without losing any data previously entered on an open screen.	High							
46	The system provides a user customizable, single student summary page is provided to view and update student information.	High							

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47	The system provides the ability for a student picture to appear on all pages.	High							
48	The system provides a student alert message can be entered which will appear or flag a student whenever the student is included in a search list.	High							
49	The system is fully integrated - all areas of the application are fully integrated with all other areas, eliminating the need for redundant data.	High							
50	The system allows for scanning hard copy documents (birth certificate, vaccination forms, cumulative records, enrollment forms etc.) and linking them to corresponding student record (Document Imaging). Scanning should be processed locally.	High							
51	The system allows letters to be generated in multiple languages.	High							
52	The system provides an end-user search feature for standardized reports.	High							
53	The system provides ability to broadcast messages to notify users of certain events.	High							
54	The system has the ability to log communication between teachers and parents (i.e. Parent contact log, Daily Behavior log, etc.) electronically.	High							
55	The system must provide field level validations as the users are entering data into fields on a given page.	High							
56	The system tracks window usage by user.	High							
57	The system tracks report usage by user.	High							
58	The system provides audit trail of all adds, changes, and deletes at the record level by date, time, and user.	High							
59	System provides audit trail of all adds, changes, and deletes at the attribute level by date, time, and user.	High							
60	The system allows the District to easily access audit information programmatically.	High							
61	The system provides the ability to access all code lists via drop-down (pick list) boxes.	High							
62	The system allows all pick lists can be accessed by typing in letters of the pick list items to determine position on the pick list	High							
63	The system allows accessing pick lists by typing in letters is case-insensitive.	High							
64	The system allows district-defined codes to have active and inactive status and date that code became active.	High							
65	The system allows the removal of district-defined codes that are not in use.	High							
66	The system shall retain historical school names and dates they were in effect.	High							
67	The system's transaction entry screens should clearly indicate required fields.	High							
68	The system provides district and school equivalency fields for all codes.								
69	The system provides state equivalency fields for all codes.	High							
70	The system provides federal equivalency fields for all codes.	High							
71	The system supports database encryption.	High							
72	The system supports authentication via Active Directory (Windows Server 2008 functional level) with LDAPS support, logon for AD accounts with expired passwords, and requires no additional AD schema extensions	High							
73	The system supports for user provisioning/deprovisioning through Active Directory integration with district defined account templates - user account is still manually activated in SIS by district staff Example: a new user is created in the "Teacher" container in AD - account is automatically provisioned with standard teacher rights in the SIS, district staff can then review this account and easily activate it	High							
74	The system supports auto Logoff/Idle Timeout capability after district defined duration	High							

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75	The system notifies the user of pending auto-logoff/idle timeout at a district defined time span (i.e. 2 min prior to auto-logoff/idle timeout, a message will warn the user, if the user click a confirmation button, the idle timer is reset)	High							
76	The system supports full SSL connectivity from clients to the application servers with wildcard SAN (Subject Alternative Name) certificate support	High							
77	The system supports the ability for the system administrator or similar to see who is currently online with username/IP/session length and which application server they are connected to	High							
78	The system supports HIDS (Host Intrusion Detection System)	High							
79	The system provides centralized / Host Remote Logging support	High							
80	The system allows one user to have a single logos to access multiple buildings.	High							
81	The system supports role and function-based security.	High							
82	The system supports granular security rights down to the field level including read, modify and delete.	High							
83	The vendor performs an independent security audit, by a 3rd party at least annually.	High							
84	The system provides an easy way to lock all users out of the system when necessary, e.g. during upgrade installations	High							
85	Conforms to security and confidentiality of student records as required by FERPA & HIPAA.	High							
86	The system provides the ability to copy one user's security to another user and provide for security templates.	High							
87	The system has the ability to give one user access to multiple or all schools.	High							
88	The system provides full multi-level security including database level security.	High							
89	The system provides full multi-level security including module level security.	High							
90	The system provides full multi-level security including functional level security.	High							
91	The system provides full multi-level security including screen level security.	High							
92	The system provides full multi-level security including field-level security.	High							
93	The system provides full multi-level security including report access security.	High							
94	The system controls the types of data a user can export (i.e. users can only export or report on certain fields based on their access level).	High							
95	The system provides pre-defined security reports listing authorized users (logins) and their security profile to authorized user.	High							

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#	Registration Requirements	Priority	Y	C	M	F	3	N	
1	The system provides a way for all student information to be viewed from one section in the application. For example, to view discipline records, it should be within a short step from viewing a student's class attendance.	High							
2	The system provides a way to quickly view, from one central area: student basic information as listed under demographic data section.	High							
3	The system provides a way to quickly view, from one central area: address/relationship information as described in that section.	High							
4	The system provides a way to quickly view, from one central area: medical.	High							
5	The system provides a way to quickly view, from one central area: daily and class attendance.	High							
6	The system provides a way to quickly view, from one central area: course selections.	High							
7	The system provides a way to quickly view, from one central area: complete schedule.	High							
8	The system provides a way to quickly view, from one central area: grade summary and grade detail for each course.	High							
9	The system provides a way to quickly view, from one central area: discipline records.	High							
10	The system provides a way to quickly view, from one central area: testing information.	High							
11	The system provides a way to quickly view, from one central area: transcript information.	High							
12	The system provides a way to quickly view, from one central area: Special Education.	High							
13	The system provides a way to quickly view, from one central area: Medicaid.	High							
14	The system provides a way to quickly view, from one central area: busing.	High							
15	The system provides a way to quickly view, from one central area: school activities.	High							
16	The system provides a way to quickly view, from one central area: student pictures.	High							
17	The system provides a way to quickly view, from one central area: custody/guardianship.	High							
18	The system provides a way to quickly view, from one central area: Enrollment in special programs, e.g., English Language Learners.	High							
19	The system provides a way to quickly view, from one central area: Housing Subdivision-subdivision student lives in, e.g., View Ridge Apartments.	High							
20	The system must contain a student summary screen that incorporates key data elements from all other student screens including but not limited to: student name and address, residence address, subdivision, grade level, homeroom, counselor, special ed code, busing data, enter/left dates, current attendance letter code, current attendance status, class attendance status, and class the student is in at the moment the screen is displayed. The system must allow end users to be able to update data on this screen.	High							
21	The system provides a way for students' information to be retrieved by last name, first name, student ID or any portion of these items, whether separately or in combination. (e.g. the last two numbers of the ID entered are 32 and the first name starts with "Je". All matching records should come up.)	High							
22	The system must provide a way to be able to find a student or group of students with any combination of criteria in the database, including but not limited to the following example: name, counselor, grade, class, period, homeroom, program, locker, active status, selected user fields, school (all schools if cross enrolled), student ID, and state ID.	High							
23	The system tracks Student ID.	High							
24	The system tracks State ID .	High							

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25	The system tracks Student name .	High							
26	The system tracks Nickname and Preferred last name.	High							
27	The system tracks Student Legal Name separate from Preferred and goes-by names.	High							
28	The system tracks the student's first, middle, last names, preferred first/nickname and last names, and generation code (i.e. Jr., III, etc.) with the option to view and print.	High							
29	The system stores student gender and ethnicity, allowing for multiple races.	High							
30	The system calculates and displays the student's age as of Current Date, August 31st, and any other specified date.	High							
31	The system tracks Address - Alternate address.	High							
32	The system tracks Phone Including Student Cell Phone.	High							
33	The system tracks Student email.	High							
34	The system tracks Distance to school .	High							
35	The system tracks Gender.	High							
36	The system tracks Grade level .	High							
37	The system tracks Counselor's name.	High							
38	The system tracks Active status.	High							
39	The system tracks Year of graduation date.	High							
40	The system tracks Special Education Disability Code.	High							
41	The system tracks Student 504 plans.								
42	The system tracks Gifted Code.	High							
43	The system tracks Rank flag.	High							
44	The system tracks Bus stop and time - AM and PM.	High							
45	The system tracks Emergency transportation.	High							
46	The system tracks Ethnic and race code.	High							
47	The system tracks Previous school.	High							
48	The system tracks Next school.	High							
49	The system tracks Current homeroom.	High							
50	The system tracks Current sports eligibility.	High							
51	The system tracks Birthplace, state and country.	High							
52	The system tracks the language spoken at the student's home (Home Language).	High							
53	The system tracks the student's first language they learned to speak (Primary Language).	High							
54	The system tracks the language the student speaks (Language).								
55	The system tracks English as second language (esl code).	High							
56	The system tracks Food service code.	High							
57	The system tracks Siblings.	High							
58	The system tracks user defined fields.	High							
59	The system tracks Legal district of residency.	High							
60	The system tracks child of a military family.	High							
61	The system tracks Boundary school.	High							
62	The district and individual schools must be able to store a minimum of 10 addresses and relationships for each student.	High							
63	The system provides the ability to prioritize contacts and define access based on relationship, including where the student lives and who that student legally lives with	High							

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64	The system provides the ability to prioritize contacts and define access based on relationship, including who is the legal guardian, preferred first and last names	High							
65	The system provides the ability to prioritize contacts and define access based on relationship, including after school care and pick-up	High							
66	The system provides the ability to prioritize contacts and define access based on relationship, including mother and father relationship if separated or divorced	High							
67	The system provides the ability to prioritize contacts and define access based on relationship, including closest neighbor	High							
68	The system provides the ability to prioritize contacts and define access based on relationship, including closest relative after the legal guardians	High							
69	The system provides the ability to prioritize contacts and define access based on relationship, including release flag	High							
70	The system provides the ability to prioritize contacts and define access based on relationship, including home language code	High							
71	For each address, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. district and municipality code h. a system so mailings are sent to the appropriate individuals	High							
72	For each relationship, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. district and municipality code h. a system so mailings are sent to the appropriate individuals	High							
73	The system stores a home language code using NSDE defined codes. A separate preferred language of communication for the student and each guardian/contact shall be used by other areas of the system to produce communication and print report cards.	High							
74	The system stores students' State ID, State Prior ID, special education ID, in addition to the district assigned local ID. The system allows only users with proper security to view or to update the State ID, State Prior ID and special education ID.	High							
75	The system stores and displays the student's active status with the option to view withdrawn students and withdraw history.	High							
76	The system calculates, displays, and stores the student's year of graduation date based on the first year the student entered the 9 th grade.	High							
77	The system includes the student's birth date and birth country.	High							

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78	The system provides a district, building, street address, city, state, and zip "transferred from" field to allow the user to enter the previous school district information.	High							
79	The system tracks the student's previous and next year's school.	High							
80	The system conforms to security and portability of student records as required by FERPA.	High							
81	The system allows the display and maintenance of data for next year, including student's building, grade, counselor, homeroom, team, etc.	High							
82	The system provides an indicator for which guardian the student lives with or whether the student lives alone. This indicator shall include persons who are financially responsible. The system has an overall ability for to map flexible relationships.	High							
83	The system validates the student address and assign a school based on the student's grade level and address. The district must be able to define the school attendance zones with the possibility of splitting streets by odd or even lot numbers and splitting streets between cities.	High							
84	The system provides a method for each address to have separate fields for number, street name, direction, suffix, apartment space number, apartment complex name, City, State, and zip code.	High							
85	The system provides tracking of homeless students with a dropdown for the homeless residence. The drop down needs to be maintained by the district with only specific users should having secured access to this information	High							
86	The system tracks program of study.	High							
87	The system allows multiple types of graduation plans to be defined.	High							
88	The system tracks students' free/ reduced/paid lunch status along with date approval and transfer on entry/withdrawal to new school for each student.	High							
89	The system calculates and display school free/reduced lunch totals by school.	High							
90	The system tracks if Free/reduced waiver has been signed.	High							
91	The system tracks ELL contact minutes.	High							
92	The system tracks First Entry date into United States Schools.	High							
93	The system tracks ELL monitoring and exit reasons.	High							
94	The system tracks ELL eligible students not receiving services.	High							
95	The system tracks accommodations.	High							
96	The system tracks country of birth.	High							
97	The system has the ability to enter and track Testing Data that are specific to ELL within the system.	High							
98	The system has the ability, when ELL student rolls over to the middle school/high school or any time an ELL student transfers schools, the next school should be notified of the ELL status of this student. .	High							
99	The system tracks parent contact with documentation of phone calls / e-mails / visits (i.e. contact log).	High							
100	The system tracks students tested but did not qualify for ELL.	High							
101	The system tracks School History (like a resume of what schools attended and dates).	High							
102	The system has the ability to flag empty required fields.	High							
103	The system has the ability to scan Home Language Survey.	High							
104	The system tracks teacher ELL qualifications.	High							
105	The system tracks parent contact with documentation of phone calls / e-mails / visits (i.e. contact log).	High							

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106	The system tracks students tested but did not qualify for ESOL.	High							
107	The system supports students served that are enrolled in other Districts.	High							
108	The system provides Mass Update utilities for the Student Demographics, Entry/Withdrawal, and district-defined Demographic data tables allowing updating, adding, or deleting of information in the field specified in selected groups of records.	High							
109	The system provides administrative staff, nurse, teachers, and parents the ability to view the same student information screens based on security privileges.	High							
110	The system provides an on-line staff directory. Teachers are entered only once but may be assigned to multiple buildings.	High							
111	The system maintains instructional staff information such as employee ID, state id, name, initials and short name, buildings, team, department, homeroom, email address. The social security number is viewed and updated only by users with proper security.	High							
112	The system provides a room directory which is used to validate homerooms and course locations.	High							
113	The system provides a room catalog that includes the room's Building, Number, Name, and Maximum Seats. The room catalog shall be able to be modified	High							
114	The system allows mailing labels to be created for any group of students that meet selection criteria. Mailing label options will include allowing parents to receive one label when they have more than one child in the group. Mailing label options will include allowing option to generate as many labels as required.	High							
115	The system supports maintenance of codes and data entry choices to be set up and controlled at the district level to enforce standardization which can also be mapped to state codes	High							
116	The system allows the district to define the online enrollment entry pages and required fields for entering a new student. This should support multiple languages as appropriate.	High							
117	The system provides for the maintenance and storage of student history (for example, but not limited to, student name, address, phone number, enrollment history, grades and transcript, attendance record, classes attended, grade level completed and year completed) across all school years and without time limitation.	High							
118	The system provides view/print access to enrollment history for withdrawn students.	High							
119	The system maintains one student district record for each student while tracking information from multiple schools and programs over multiple years.	High							
120	The system supports federal requirement for multiple race categories per student.								
121	The system supports federal requirement for multiple ethnic categories per student.	High							
122	The system allows custom programming options when canned package fails to meet the district's needs.	High							
123	The system allows free/reduced/paid lunch information to be automatically imported/uploaded/posted from cafeteria management package (nutrition system) at regularly scheduled intervals (e.g., hourly, daily, etc.) with no human interaction.	High							
124	The system provides a search function allowing a selection of students based on a combination of fields in demographic and other areas. The student list and query should be saved in an excel file which can be easily saved onto a client desktop. Users should be able to save queries for future use. The system provides the ability to allow user generated reports to be saved as CSV, PDF files and webpages.	High							

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125	The system provides the ability to search on the student's name using tools such as wildcards and Soundex.	High							
126	The system provides an alert message that will display when a user brings up a student's record, e.g., "Do not release this student to anyone except the primary guardian."	High							
127	The system provides alerts which can be viewed across system screens. The system allows free form text field within alerts and smart alerts that pop up on the main, attendance, and nurse pages, e.g. IEP, life-threatening, family, cross-enrolled.	High							
128	The system flags medical, legal, and disability alerts system-wide. These alert codes shall be table validated, dated, and defined by the district.	High							
129	The system has "smart" alerts with different designators (colors) for the type of alert. These alerts shall be displayed on all teacher screens. Highlighting the student name in the gradebook is one possibility.	High							
130	The system provides a way to indicate that a student is to be excluded from state reporting.	High							
131	The system provides for tracking of students who attend a school outside the district including name of the school, state id of the school.	High							
132	The system provides a way to track students attending a private school, but receiving services in the district. The tracking shall include the number of minutes per day.	High							
133	Allows district to specify alpha or numeric student ID's up to ten digits.	High							
134	The system generates automatic sequential assignment of student ID's while allowing users with appropriate security to override. The student ID must always be unique.	High							
135	The system provides a utility for the authorized user to change a student ID to a new user-specified number throughout the database.	High							
136	The system automatically links enrollment and withdrawal status to Average Daily Attendance (ADA) eligibility and all attendance and membership calculations.	High							
137	The system has the ability to conduct an automated transcript audit that enables a view of missing criteria/credit and creates an alert for graduating seniors.	High							
138	The system has the ability to work with student data while student is in a transition period. i.e. in district transfer students/students matriculating to another building.	High							
139	The system has the ability to report students enrolled in the wrong building with no approved transfer to the enrolled school.	High							
140	The system provides the ability to assign a school of attendance separate from the residence school and requires a valid reason code for this assignment.	High							
141	In order to assign residence schools to students, the system has the ability to maintain plan areas and attendance zones which can be used to tie addresses to schools at the appropriate grade level.	High							
142	The system allows for mass update of next year enrollment and end of year withdrawal based on subdivision and school boundary or projected school with the capability to override individual students.	High							
143	The system has the ability to pre-enroll students.	High							
144	The system provides the ability to have multiple mailings per student based on guardian addresses for automatically printing multiple copies of address labels, schedules, interim progress reports, report cards, attendance, medical, and discipline letters, etc..	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
145	The system supports extensive communications fields for students and guardians/contacts including fields for home phone, pager, fax, cell, employer's name and phone, email address, daycare name and phone, etc.	High							
146	The system allows the district to have the option as to whether to allow guardian/contact address/phone/email changes for students enrolled in a different school. If it is allowed, the system automatically notifies the office personnel at the other school.	High							
147	The system creates Entry/Withdrawal records whenever students enter into or withdraw from a district, building, grade, or calendar type. The user must enter a valid district-defined withdrawal reason code.	High							
148	The system displays Entry/Withdrawal records in chronological order with the most recent entry date at the top and the oldest entry date at the bottom.	High							
149	The system displays all of a student's entry/withdrawal records on one page for the entire time that the student has been enrolled in the district.	High							
150	The system has the ability to require withdrawal from one school before enrollment in another school.	High							
151	The system has the ability to allow enrollments in multiple schools for current and next year while maintaining a home school for both current and next year..	High							
152	The system provides the capability to track student's mobility within the district.	High							
153	The system shall retains student information for a district-defined number of years for both active and withdrawn students, across all school years and campuses.	High							
154	The system allows the District to set up programs and run reports where a student's entry and exit date for the program and associated fields can be tracked. The types of programs include but not limited to Gifted & Talented, Homeless, BIL/ESL/LEP, 504, PRS, Special Education, Title 1, Migrant, Immigrant, PEP, Dyslexia, etc.	High							
155	The system allows processing of school-to-school transfers.	High							
156	The system allows unique district-defined fields for each special program.	High							
157	The system provides a field to track if a student is a Foster Child.	High							
158	The system tracks immigrant date and type, and whether the student is identified as an immigrant under NCLB.	High							
159	The system tracks Title 1 instruction being administered, title 1 support services being offered.	High							
160	The system provides a field to store the number of years of education in the US, district, school.	High							
161	The system tracks dates or entry and exit and associated field and keeps a history as needed for state reporting.	High							
162	The system provides an end-of-school year process to mass update all students to their next year building, grade, homeroom, teachers, team, etc.	High							
163	The system has the flexibility for homeroom assignments to be either entered by individual students or mass assigned including being assigned by scheduling period or by user-defined criteria.	High							
164	The system allows for pre-registration of students within the district for the next school year without affecting ADA and Membership calculations and without including them in the reporting of current students.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
165	The system tracks students for their association with another district. The district numbers are validated using a district-defined list.	High							
166	The system provides a student's withdrawal code to automatically flag a student as inactive throughout the database and automatically exclude the withdrawn student from reports, letters, and mailing labels, queries in all modules, unless otherwise indicated.	High							
167	The system provides a duplicate student check to be performed early in the enrollment process rather than at the end.	High							
168	The system provides the ability to track at-risk population and corresponding information for all criteria listed by the state and defined by the district.	High							
169	The system tracks transportation information for each student including route number, stop number, driver's license number, license plate, registration, and insurance information.	High							
170	The system allows Family Contact information to be copied to new siblings and a way to find potential family members during enrollment. The system has checks and reminders to make sure that this is not done carelessly and only allow parents/guardians in the system once.	High							
171	The system supports searches using user-defined criteria across years and schools.	High							
172	The system supports ability to search by family.	High							
173	The system stores membership information, book assignment, locker assignment, parking eligibility and decal number.	High							
174	The system provides the ability to assign lockers based on criteria such as grade-level. (i.e., assign a range of locker numbers to a grade-level including controls by odd & even numbers).	High							
175	The system supports tracking locker numbers, lock and serial numbers, and ability to report and export data as .csv files.	High							
176	The system tracks information (type of services to be received) for students with 504-plan, start and end dates.	High							
177	The system produces report showing program membership by dates, by campus, by program, etc.	High							
178	The system has the ability to automatically identify, report and optionally mass-update student's needing an At Risk Indicator based on information in the database. The information used would include but not be limited to LEP, discipline, grades, STATE TEST scores, and SSI code.	High							
179	The system allows scanned documents to be stored and organized with association to a student. Document management capabilities are an important requirement and a high priority for Special Education. The system has the ability to assign metadata.	High							
180	The system supports multiple households per family.	High							
181	The system provides notification if a student address and/or phone number already exist in the database.	High							
182	The system provides a parent/guardian/contact relationship code and title for each.	High							
183	The system tracks similar addresses for group mailings, (i.e. two students in the same household) to mail to only the unique address.	High							
184	The system allows addresses to be selected from a dropdown of valid addresses maintained at the district level.	High							
185	The system allows separate physical and mailing addresses for student and contacts.	High							
186	The system provides an effective date of address.	High							
187	The system has the ability to view student picture.	High							

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#	Registration Requirements	Priority	Y	C	M	F	3	N	
188	The system has the ability to store and view parent/guardian picture within the system.	High							
189	The system automatically re-size student pictures to fit the screen independent of the original photo size.	Medium							
190	The system supports automatically importing photos in mass and individually.	High							
191	The system provides emergency contact information includes physician, preferred hospital, and insurance information for each student.	High							
192	The system provides a drop-down list of valid hospital names is provided so the hospital doesn't need to be re-typed each time it is entered. This can be overridden as needed.	Medium							
193	The system stores the student's counselor name and id number.	High							
194	The system allows district-wide family management with ability to link siblings and household members across the district.	High							
195	The system provides a complete family profile on one screen.	Medium							
196	The system maintains family contact information with associations to each student under their responsibility in order to support district-wide Family Management and to track siblings and household members across the district.	High							
197	The system automatically searches district database for potential student matches and duplicate students as the registration information is being entered. (Date of Birth match should be an option, but not a requirement for match).	High							
198	The system checks address/relationship information to provide sorts for multiple mailings. Report cards, attendance letters, discipline letters, mailing labels and general notices must be sorted to allow multiple addresses and proper sorting.	High							
199	The system has the ability for this information to interface with an automated parent notification system that includes homework and e-mail notification of attendance and grade Reports.	High							
200	The system student information must include Medicaid and school activities data on the student.	High							
201	The system tracks every student's withdrawal, inactivation and reactivation to and from the district. The system must keep a continuous log of the transactions that can be viewed for each student in the student's main record. When these transactions occur, the data must be available without needing to re-enter demographic data as defined earlier.	High							
202	The system allows for student transfers and allow the demographic information to follow that student to the new school. All these transactions must be recorded and available to be viewed in the student's record.	High							
203	The system must account for students on home instruction.	High							
204	For any transaction that occurs to a student's grade, homeroom, CTE-tech, special education, resident, and/or calendar, demographic information, the system shall accurately record this data and have the data available to be viewed for each student.	High							
205	The system reports on transfer student by status, ethnicity, grade and location.	High							
206	The system tracks student withdrawal information (e.g. withdrawal reasons, withdrawal dates, comments etc.).	High							
207	The system has the ability to report any students enrolled in the wrong school (incorrect home school with no approved transfer to the enrolled school).	High							

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements		Y	C	M	F	3	N	
208	The system allows district defined enrollment and withdrawal codes and associate them to district specific codes.	High							
209	The system has the ability to require withdrawal from one school before enrollment in another school.	High							
210	The system allows pre-registration of new students for next year (i.e. incoming Kindergarten students) without counting them in the active students for the current school year.	High							
211	The system tracks student's mobility/enrollment history.	High							
212	The system allows for pre-registering, students to be registered, assigned to a campus, and scheduled without affecting ADA & Membership, and Food & Nutrition calculations. The system shall interface with the School Nutrition System.	High							
213	The system allows data changes to be entered with an effective date other than today.	High							
214	The system maintains one district student record while tracking information from multiple schools over multiple years	High							
215	The system allows for mass update of next year enrollment and end of year withdrawal based on grade-level, geocode/neighborhood school and approved transfers.	High							
216	The system allows withdrawal date to be recorded as the last day the student was in membership. Also, special program withdrawal dates can be recorded as the last day the student was served in program.	High							
217	The system tracks students who are dual attended (on multiple campuses).	High							
218	The system provides a withdrawal code to automatically flags student as inactive throughout the database. This code shall automatically exclude withdrawn students from reports, attendance letters, and mailing labels in all modules, unless otherwise indicated.	High							
219	The system allows the District to specify method of first day enrollment, indicating those present or flagging "no shows".	High							
220	The system provides quick links to auto-generated lists of recently enrolled or withdrawn students.	High							
221	The system tracks student's school assignment, grade, reason for entry, assignment date, homeroom etc.	High							
222	The system maintains status codes for students (i.e. pre-registered, active, inactive, deleted, etc.)	High							
223	The system supports automatic grade promotion process (e.g. from 4th grade to 5th grade) unless specifically marked in the system to hold student back.	High							
224	The system tracks and modifies school boundaries using computerized mapping tools (geo-coding).	Low							
225	The system does not allow assigned ID numbers to be re-assigned.	High							
226	The system has the ability to produce withdrawal form with all student information (i.e. Grades, attendance, resource requirements, discipline, etc.).	High							
227	When enrolling a new student, the system shall automatically check student information to ensure the student is not already enrolled (name, address, birthdate, etc.).	High							
228	The system has the ability to report current student enrollment by any size neighborhood (x,y coordinate range).	Low							
229	The system has the ability to report neighborhood demographic trends over multiple years for historical trends by neighborhood.	Medium							
230	The system has the ability to report transfers over multiple years (trends).	Medium							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
231	The system has the ability to run reports by enter code, including reports on out of district transfers by student information.	Medium							
232	The system has the ability to group addresses by pre-defined categories (i.e. Subdivisions or neighborhoods).	High							
233	The system calculates transfer capacity by school and by program (e.g. special Ed, ELL, bilingual classes) based on intended class sizes, projected enrollment etc.	High							
234	The system has the ability to modify and/or approve transfer capacity by school and by programs (i.e. special Ed programs).	Medium							
235	The system must support summer school as part of the next school year without the need to create a separate instance of the database or a separate school, and without disrupting the regular campus assignment or schedule.	High							
236	The system has the ability to produce registration/enrollment package (e.g. demographic information, class schedule).	High							
237	The system has the flexibility for homeroom assignments to be mass assigned either alphabetically by grade, by a selected period of the day or manually for individual students. When done by an individual student, the posting routine must allow students to be posted into a specific homeroom or be assigned to different homerooms at the time of posting.	High							
238	The system has the ability for a mass assignment routine for mass adding students to counselors alphabetically by grade is required.	High							
239	The system has a room table and homeroom table and make that data required.	High							
240	The system provides a locker table that ties a specific locker number or a lock to a series of one to five combinations. For the tumble locks, there should be a routine that assigns the new combination to the student. There should also be a free form area that can provide a description of where the locker is located.	High							
241	The system provides a counselor table.	High							
242	For posting data to user fields, The system provides a mass updating routines for all students or selected students by student, by grade, by homeroom and by counselor. Updating and posting must be available for one or more specific user fields.	High							
243	The system has the ability to input more than one email address per contact (particularly parents)	High							
244	The system has the ability to attach photos (of people not allowed to pick up a student, or of only people allowed to pick up student, etc.),	High							
245	The system provides board and district level reporting, fee reporting, incident reports, enrollments by grades, etc.	High							
246	The system provides an overall menuing system with simplicity and ease of finding information. It should incorporate the use of "favorites".	High							
247	The system allows administrators, teachers and counselors to directly contact parents by a click on the email address.	High							
248	The system automatically ties families together.	High							
249	The system has the ability to accept online registrations. Parents can view forms, enter information, electronically sign and submit registration packet via the internet.	High							
250	The system meets State Report Compliance for Washington.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Attendance Requirements		Y	C	M	F	3	N	
1	The system utilizes an attendance code table that relates an attendance code to a description, its associated number of days absent, tardy, days possible and a state code for the absence.	High							
2	The system provides a school-based daily attendance code table that can be copied into another school for their use.	High							
3	The system provides a calendar for the entire year that can be created by entering the start date and end date.	High							
4	The system allows each school to be able to create multiple calendars.								
5	The system allows each school calendars to account for holidays, snow days, in-service days, staff development days, marking period end dates, test days and half days.	High							
6	The system provides an on-screen view of the school calendar must be available.	High							
7	The system can accommodate year round school.	High							
8	The system provides for posting daily attendance for individual students with the flexibility to be done by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so on any part of either of the above areas.	High							
9	The system provides for the posting of daily attendance by homeroom with the options to be done by the individual day or by a range of dates.	High							
10	The system provides the ability to take attendance for students (e.g., special education, CAPS) that are taking classes in other buildings.	High							
11	The system provides for posting by homeroom, a list of students for that specific day must be displayed. The homeroom list must include student ID, grade, name, and a space to enter the day's code for that student.	High							
12	The system provides for the display of the attendance code description when entering the attendance code.	High							
13	The system provides for tardies; the system must have the flexibility to post by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so by any part of either of the above areas.	High							
14	The system provides for tardy entries that track the date and time of the tardy, the reason, optional free form narrative, and the associated daily attendance code.	High							
15	The system provides a reason for the tardy that ties the tardy code to the daily attendance table must be included to accelerate the data entry process. All codes that relate to this process must be available to be displayed for easy access to valid codes.	High							
16	The system displays a student's daily attendance in a variety of ways. Some ways required are to see the entire calendar with the attendance codes along with a key to the code's meaning. In addition, you must be able to view this information by date order, day of the week order, and by attendance code. All views must be able to appear on the screen and moving from one view to the other should not be a time consuming task.	High							
17	The system includes reports from the attendance code table and individual school calendars.	High							
18	The system provides a daily attendance list that has the flexibility to be produced for a specific date and for a specific attendance code. In addition, the school must have the option for the above list to include the phone number of where the student resides and an emergency number.	High							
19	The system displays student alerts on attendance screen.	High							
20	The system includes on every daily attendance absence list a narrative that will be displayed on the bottom of the list. This daily announcement must be user defined.	Medium							

21	The system provides an excessive absence list which includes the ability to specify a range of dates to consider and report on the number of absences and tardies within that range.	High							
22	The system provides an attendance statistical report for any specific year and month that shows the attendance code and total number in that code by gender and other criteria.	Low							
23	The system provides enrollment summary reports that calculate tardies and absentees by grade and sex, must be available. The report must also calculate the average daily attendance, average daily enrollment and average daily membership. This information must be available for any specific date for a specific student.	High							
24	The system provides an attendance report of all the students for a specific day and must include grade, homeroom, reason, and monthly total for the students' absences and tardies.	High							
25	The system provides multiple user defined letters to be stored and merged with the address/relationship information to notify family members of excessive absences.	High							
26	The system provides user defined class attendance codes and a reason for the absence that is tied to the attendance code for easy input.	High							
27	The system provides for attendance taking within the system that is intuitive and easy to use for teachers and administrators.	High							
28	The system must allow for the ability for mass entry of absences over multiple days by student or group of students.	High							
29	The system provides for posting of data to be performed by date or by class section.	High							
30	The system must be able to post students as entering late or leaving early and record the time of entering/leaving. The system must be able to record multiple entries for one class period, e.g., a student leaves for lunch with Mom and returns before the period is over.	High							
31	The system provides daily attendance that is updated in real-time from the class room teacher.	High							
32	The system provides the capability to pre-post or delete excused absences or field trip information. Posting routines must be available by class section, by individual student, grade or team to cover a single period or range of periods, including non-consecutive field trip days.	High							
33	The system provides the user should be able to view the total class absence for the student's entire school year and then pick certain courses to view marking period absence totals and then the specific days absence for each course.	High							
34	The system must contain tables that define multiple sets of the starting and ending times of each period. System must be flexible and support multiple bell schedules and early releases.	High							
35	The system is designed to calculate student days absence based upon district definition of how to calculate days absence from class absences.	High							
36	The system provides a report student attendance history, including days absence.	High							
37	The system provides a report of selected student attendance history based upon attendance criteria.								
38	The system provides a report of student summary attendance data.	High							
39	The system provides a report of daily class absence list.	High							
40	The system provides a report of excessive absence list for a range of dated class absences to include one or more categories related to excused, unexcused and/or unlawful	High							
41	The system provides a report of ability to flag 5, and 10 unexcused absences per month and per semester.	High							
42	The system provides a report of excessive absence letter for a date range of absences to include one or more categories related to excused, unexcused and/or unlawful, e.g., support reporting of more than 7 class period absences.	High							
43	The system provides the ability to create an attendance calendar that reflects the classes being taught for the number of hours/periods for a specific day.	High							
44	System must provide for the configuration of absence alerts. These should "pop up" or appear distinctly for each student when user defined absence criteria are met.	High							
45	The system provides absent dates to be entered for valid dates as designated on the school's calendar. Also, the student must be enrolled on the date specified.	High							

46	The system allows a student who is taking classes in more than one school, he or she will appear on the attendance list for the appropriate school for each of his/her classes. Full day absences should roll over to all buildings where the student is cross enrolled.	High							
47	The system provides the ability for a student transfers schools or courses, attendance information is still available.	High							
48	The system provides absence records that can only be entered or updated by users who have been given the proper security.	High							
49	The system allows attendance history to only be entered or updated by users who have been given the proper security.	High							
50	The system allows authorized user to configure number and types of absences which will trigger parent notification.	High							
51	The display of the school's calendar shows an indicator for each type of nonattendance day (such as holidays, in-service days, staff development days, district-defined day types).	High							
52	Absence notifications may be sent to guardians by letter or email and will support multiple languages.	High							
53	Automatically notify appropriate recipients when a student reaches a district-specified number of absences; excluding students who are exempt.	High							
54	After absence corrections have been made to a prior reporting period, the user may run a revised attendance report for the prior period.	High							
55	The system must provide a Teacher Attendance Verification report requiring the teacher's signature to use for auditing purposes. This report must include each student's dates absent, present, and enrolled and distinguish between funded and non-funded absences. It must include for each student the total membership, total absences, total ineligible membership, and total eligible membership for the Average Daily Attendance accounting period. The report must include all days for the grading period being run. The report must include totals for the class and grand totals for the report.	High							
56	The system must be able to report teachers' compliance on taking attendance and will provide a notification to the teacher when attendance has not been completed within a specified amount of time.	High							
57	The vendor must be capable of modifying the system to accommodate any changes or new requirements from the district.	High							
58	The system allows the user to query and run a report to get a list of student absences.	High							
59	The system provides for attendance for withdrawn students to be readily and easily available.	High							
60	The user must be able to run a Perfect Attendance Report (as defined by the district).	High							
61	The system provides s audit trail management.	High							
62	The system must support taking attendance on an alternate bell schedule for a given date. For example, semester exams may be given on a day where only period's 4 - 8 meet.	High							
63	Ensure that absences cannot exist for a student on days that the student is not enrolled. The system must automatically find and delete the invalid absences.	High							
64	Student absences may be easily maintained on a class or daily basis. The absences are easy to display and report on.	High							
65	The system must be able to take attendance on non-regular class related activities, e.g., testing days.	High							
66	The system supports full district level reporting, analysis, and data mining.	High							
67	The system allows attendance policy violations (APV) to be removed or overridden.	High							
68	The system provides the option to prevent teachers from overwriting absences entered by the office.	High							
69	Allows excessive absence reports to be run based on different criteria.	High							
70	Query students with more than user specified number of unexcused school days or periods	High							
71	The system provides ability to print letters to parents based on percent absent and /or days absent.	High							
72	Attendance letters may include both demographic and attendance information.	High							
73	Teachers are allowed to view attendance information only for their students.	High							

74	The system provides s a daily absence office report with phone numbers that is quick and easy for attendance personnel to use.	High							
75	The system provides s both summary and detail attendance reports for a range of dates.	High							
76	The system provides cumulative attendance information for all students in all buildings can be easily accessed and reported.	High							
77	The system provides attendance data that is linked with demographic, general academic, and entry/withdrawal data for each student.	High							
78	The system maintains attendance by building for those students who transfer from one building to	High							
79	The system provides absences to be maintained by building and period for students attending classes in multiple buildings.	High							
80	The system provides the ability for a campus to view student data for students that have been enrolled on that campus but are currently enrolled on another campus. Also provides for the current enrolled campus to view student attendance on the student's prior enrolled campuses.	High							
81	The system supports different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the authorized user to define start and end times for periods by school calendars.	High							
82	The system calculates average daily membership and daily attendance based on the school's accounting period.	High							
83	The system provides ability to process no-show students that were absent on the first day of school.	High							
84	The system maintains an adequate number of district-defined absence codes, controlled at the district level, to meet the needs of the district. (Minimum of 60, plus additional for growth)	High							
85	The system provides for multiple years of attendance data and can be easily viewed and reported on.	High							
86	The system supports daily attendance information to be entered for morning only, afternoon only, or	High							
87	The system supports attendance to be entered for a student by student ID or student name.	High							
88	The system supports attendance to be posted by individual students, predefined groups of students, and by period or course/section.	High							
89	The system supports individual students to be excluded when attendance is entered for a group of students.	High							
90	The user may enter a default absence code when entering absences for a group of students. The default absence code may be overridden for individual students.	High							
91	The system provides the option for the district to grant security to designated personnel to allow them to post absences for future dates.	Medium							
92	The system supports different types of school calendars (i.e., quarters, trimesters, semesters, full year.)	High							
93	The system support half-day calendars with half-day ADA membership.	High							
94	The school calendars automatically interface to the attendance module so that students not scheduled to be in school or in a class are so noted.	High							
95	The system allows school calendar to be altered during the school year (before or after the fact)	High							
96	The system supports attendance that is fully integrated with scheduling changes and class rosters automatically reflect adds and drops	High							
97	The system supports attendance that is compatible to all forms of schedules at the secondary level.	High							
98	The system provides attendance information that is fully integrated to enrollment, withdrawal and Average Daily Attendance status.	High							
99	The system provides attendance information that is fully integrated to grade reporting.	High							
100	The system provides attendance information that is integrated to special programs contact hours.	High							
101	The system provides school calendars that are saved for prior years and the system allows for maintaining calendars for current and future year.	High							
102	The system allows school calendars to be copied to other buildings.	Medium							

103	The system provides attendance totals that are automatically calculated by the system at any time specified by the district.	Medium							
104	The system allows accumulated absence totals for each student by								
105	The system allows accumulated absence totals for each student by Days Enrolled	High							
106	The system allows accumulated absence totals for each student by Days in Membership	High							
107	The system allows accumulated absence totals for each student by Days in attendance	High							
108	The system allows accumulated absence totals for each student by Total absences	High							
109	The system allows accumulated absence totals for each student by Excused absences	High							
110	The system allows accumulated absence totals for each student by Unexcused absences	High							
111	The system allows accumulated absence totals for each student by Total tardies	High							
112	The system allows accumulated absence totals for each student by Unexcused tardies	High							
113	The system allows accumulated absence totals for each student by Excused tardies	High							
114	The system allows accumulated absence totals for each student by Number of home bound days	High							
115	The system allows accumulated absence totals for each student by Total Days Absent	High							
116	The system allows accumulated absence totals for each student by Total Days Present	High							
117	The system allows accumulated absence totals for each student by Attendance Percent	High							
118	The system allows accumulated absence totals for each student by Average Daily Attendance	High							
119	The system allows accumulated absence totals for each student by Average Daily Membership	High							
120	The system allows for separate absence entries by the teacher and by the office staff, so that if an office entry is made, it will override the teacher entry.	High							
121	The system fully integrates office and classroom attendance.	High							
122	The system provides real-time entry, update and viewing of attendance between the office and the classroom.	High							
123	The system includes the capability to display a whole month or year of attendance for a student and then edit attendance on that screen.	High							
124	The system provides desktop reporting for attendance information.	High							
125	The system allows the district the option to allow pre-approved or Office absences to be stored.	High							
126	The system provides the option, when allowing pre-approved absences, for the teacher to be able to override with notification to the office when the student is actually present.	High							
127	The system allows the teacher to enter absences and tardiness from a classroom workstation.	High							
128	The teacher is able to enter attendance and note absences and tardiness from a mobile device.	High							
129	The system provides for student pictures to be displayed when the teacher is taking attendance, if the teacher prefers that method.	High							
130	Class birthday lists are provided to teachers on-screen.	Medium							
131	The system allows the office attendance clerk with proper security to access and modify student attendance history. The history includes the reason codes for the absences	High							
132	The system allows the teacher to view, but not update, student attendance history for the entire school year.	High							
133	The system provides a Missing Submission report listing classes or homerooms where attendance has not been taken.	High							
134	The system sends a clear alert/notification to teachers who have forgotten to enter attendance for the class. System should provide for different types of notifications, not just e-mail.	High							
135	The system provides a submission tracking system to enable office to determine which teachers have not completed attendance entry.	High							
136	The system optionally allows attendance codes to be restricted from use by teachers.	High							
137	System should enable counselors to enter absence reasons within their building e.g. student is with counselor for some reason and is missing class.	Medium							

138	The system provides the ability to restrict teachers from changing attendance entered by the office.	High							
139	The system allows teachers to be optionally restricted from entering attendance after a deadline for each class period.	Medium							
140	The system allows related absence codes to be aggregated into groups for reporting purposes (for example, you can group all illness-related absences with Excused Absences).	High							
141	The system optionally provides blank attendance registers for manual collection of attendance data.	High							
142	On a block day when classes are multiple periods, the system allows the teachers to enter an absence for the first period that carries to the other periods, but give them the ability to alter the absence for the later periods in the block if a student returns to class. Absence should be tracked by minutes within each period to enable accurate tracking of the scope of absences in a period.	High							
143	The system allows the district an adequate number of attendance exceptions reporting and alert thresholds for total or consecutive absences or tardies by code type and date range to meet the state requirements.	High							
144	The system supports and maintains the number of school district-defined attendance letters to meet state requirements.	High							
145	The system provides the ability to track attendance review committee decisions.	Low							
146	The system provides a class roster with seating chart and pictures.	High							
147	The system supports attendance that is compatible to all forms of schedules at the elementary level.	High							
148	The system optionally supports suspension codes from Discipline that automatically update student attendance for the proper date range.	High							
149	The system provides a report on absence statistics by student and by school.	High							
150	The system provides ability to track court warnings and court dates.	High							
151	The system provides the ability to support monitoring of truancy at the district level.	High							
152	The system provides the ability to support monitoring of truancy proceedings at the district level.	High							
153	The system supports district-wide attendance entry - when a full day absence is entered at the home school, the absence should carry over to other schools that the student attends on the day.	High							
154	The system provides a truancy report based on the district's definition of truancy.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
1	The system provides district-wide creation and dissemination of course catalog information.	High						
2	The system provides for user designation of "look-up" fields (and definition of their corresponding values) in the course catalog record.	High						
3	The system provides user defined fields for the tracking of additional information about course catalog records (Higher Education College Board designations, NCAA, etc.).	High						
4	The system provides for district-wide maintenance of course catalog information.	High						
5	The system provides for school ownership of course catalog elements relating to scheduling and assignment of credit values.	High						
6	The course catalog system provides for the association of course catalog records to GPA calculation definitions.	High						
7	The system provides for the association of course catalog records to graduation requirement and career planning definitions.	High						
8	The system provides for the association of course catalog records to state course codes and titles.	High						
9	The system provides for the transfer of student academic history information to higher education institutions through the cross referencing of the course catalog to national standards definitions.	High						
10	The system allows assignment of a district course code.	High						
11	The system allows for the entry of a district course title (short text).	High						
12	The system allows for the entry of a district course description.	High						
13	The system allows assignment of a course classification of instructional programs (CIP) code and description (needed for P210 Voc reporting).	High						
14	The system allows assignment of a course United States Department of Education Cluster code and description (needed for Career and Technical Education reporting).	High						
15	The system includes a course Articulated Tech Prep Status indicator (yes or blank, for P210 Voc reporting).	High						
16	The system allows for grouping of CTE courses by selected CIP codes for purposes of identifying students who are vocational completers.	High						
17	The system allows assignment of a district course curriculum code.	High						
18	The system allows assignment of a course curriculum subject area code (e.g. music or art within fine arts).	High						
19	The system allows assignment of a course type code (e.g., independent study, advanced placement, basic, honors, limited English, regular, special education).	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
20	The system allows assignment of a course source code (e.g., city campus, other out-of-district, running start, district, waived, etc.).	High						
21	The system allows for assignment of a course status code and date (active, archival, etc.).	High						
22	The system allows for indicating what grade level of students typically take this course.	High						
23	The system provides for the designation of whether attendance may be taken for a course.	High						
24	The system provides for the designation of whether academic marks may be assigned for a course.	High						
25	The system provides for the designation of whether academic marks will be posted to course history for a course.	High						
26	The system provides for the designation of whether a course appears in student transcripts.	High						
27	The system provides for the designation of whether a course is to be included in the students high school list of courses.	High						
28	The system allows entry of the average minutes per week of instruction for the course.	High						
29	The system allows for entry of a course designator which becomes attached to the student transcript.	High						
30	The system provides the ability to associate a course with special programs.	High						
31	The system provides scheduling routines must be available to address the needs of elementary, middle and high schools.	High						
32	The system supports multiple course formats including 6 week, 7 week, 9 week (quarter), 12 week (trimester), 18 week (semester), 36 week (full year), alternating day and block courses that can "explode" into multiple courses. In addition, The system allows for the mixing of any of the above combinations.	High						
33	The system has the ability to determine the current semester codes and day of cycle for any given calendar date.	High						
34	The system is capable of handling rotating block scheduling as well as traditional scheduling methods.	High						
35	The system defines a course with a code and description. Each course must be related to a department. Information must be readily available that shows the course, its credits and if the course is required for graduation.	High						
36	The system allows for alternate requests. There is an easy method to view the number of times a certain course was requested as a primary and an alternate.	High						
37	The system allows each course and section to be able to meet in multiple periods throughout the day, up to 99 periods in a day.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
38	The system allows for each course section to have grade restrictions specified.	High						
39	The system allows for course sections to be able to be defined as being offered in a different school/location than the Student's home school.	High						
40	On-line requests are different from adding courses. After adding the course requests for a student, The system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	High						
41	When requesting a course, the system allows for a student to request a class whether or not a teacher has been assigned to the class.	High						
42	The system allows a method to lock in specific course sections into the students schedule and allows the other requests to be scheduled around that course.	High						
43	On rare occasions, students may not be able to have courses in certain periods during the day. The system has the ability to accommodate that student during the request process.	High						
44	The system allows for study hall routines that will place students into study hall sections automatically.	Medium						
45	At the middle and elementary schools, administrators often desire to provide heterogeneous or homogeneous scheduling. The system has the ability to group students by criteria such as band, gifted and talented, test scores, etc. and relate these groups to courses.	Medium						
46	The system provides mass input routines to change schedules and course requests must be available by grade, gender, team, homeroom and individual students.	High						
47	During an add, delete or drop/add process the system provides each school with the option to track the reason for the transaction(s).	Medium						
48	When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department and semester code. Moreover, the system should help the school personnel in deciding the courses that fit the student's schedule.	High						
49	When doing schedule changes, the system provides the school personnel with on-line information as to the number of available seats. The system should allow for overrides and entering conflicts but provide warning messages when this occurs.	High						
50	The actual scheduling routine balances by class section.	High						
51	The scheduling program accounts for a student's degree of difficulty, course priorities and student priorities. Once a scheduling run has been completed, the system has the ability to save the complete students and then work with the incomplete students only.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
52	The system has a program that builds the master class offering and then is used to do the actual scheduling. The system allows a school to define teacher restrictions, room restrictions, and class availability.	High						
53	After the master is created, the system provides the school with the option to rollover the information as a starting point for the upcoming year.	High						
54	The system provides a report and view of a Master class list.	High						
55	The system provides a report and view of a Course request list by course or by student.	High						
56	The system provides a report and view of Request tallies.	High						
57	The system provides a report and view of Room usage.	High						
58	The system provides a report and view of Teacher usage.	High						
59	The system provides a report and view of Period or class load analysis, including doubletons.	High						
60	The system provides a report and view of Singleton courses in conflict.	High						
61	The system provides a report and view of Singleton courses in conflict by student.	High						
62	The system provides a report and view of Student requests in either a list or matrix format.	High						
63	The system provides a report and view of Student schedules.	High						
64	The system provides a report and view of Teacher schedules.	High						
65	The system provides a report and view of scheduling conflicts.	High						
66	The system provides a report and view of Unscheduled students list or matrix.	High						
67	The system provides a report and view of Class lists.	High						
68	The system provides a report and view of Class distribution.	High						
69	The system provides a report and view of Room and teacher availability.	High						
70	The system provides a report and view of Study hall class lists.	High						
71	The system provides a report and view of Drop/Add information.	High						
72	The system provides a report and view of Incomplete student schedules.	High						
73	The system provides a report and view of Students with too many courses.	High						
74	The system provides a report and view of Number of seats open by hours/periods and seats/by grade.	High						
75	The system provides a report and view of Rooms-by teacher, by room, by hour.	High						
76	In the drop/add reports, the information is available by: the person that entered the schedule change, the teacher, the student and the counselor. The report log includes the reason, time and date of the change.	High						
77	The system provides an incomplete student schedule report and includes the open periods in a student's schedule.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
78	The system generates a Conflict report that allows refining a master schedule by listing courses scheduled at the same time.	High						
79	The system provides a fully automated scheduling system (scheduling rooms, courses, teacher, and aides).	High						
80	The system allows students to be scheduled selectively by grade, gender, name, or a set priority.	High						
81	The scheduling process has gender balance with the ability to query by course by gender.	High						
82	The system provides Course sections with the ability to restrict by gender.	High						
83	The system has the ability to prioritize students for scheduling based upon a random algorithm. The system should not prioritize students according to name or ID.	High						
84	The system has the ability to link semester one and semester two of a course so scheduling priority is given to the same teacher and same period. Also, The system has the ability to schedule unrelated one-semester courses in different semesters.	High						
85	The system has the ability to schedule singletons and priority courses first during the scheduling process.	High						
86	The system supports the scheduling of students in groups or blocks of courses.	High						
87	The system supports scheduling of sequenced, co-requisite and pre-requisite, anti-requisites, schedule before, schedule after, schedule opposite classes. The system includes auto-checks for pre-requisites before allowing a course to be added to a student's schedule, as well as auto-checks to see if a student has already taken and passed the course	High						
88	The system supports scheduling utilizing classes of variable sizes.	High						
89	Classroom maximum seating is enforced by the system with the ability to override.	High						
90	The system provides the ability to override maximum class enrollment for authorized users.	High						
91	The system allows the ability to schedule courses offered less than five days per week.	High						
92	The system provides the ability to schedule single or multiple semester classes.	High						
93	The system supports locking a scheduling run and preventing it from being deleted or modified.	High						
94	The system provides for mass scheduling of students as well as individual student scheduling. The system provides for walk-in student scheduler for students enrolling after the start of the school year. After adding the course requests for a student, the system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
95	The system allows a mix of automated student scheduling and manual input.	High						
96	The system provides the ability to schedule sub-groups of students (e.g., juniors).	High						
97	The system allows course request alternates. Alternates can be automatically scheduled if requested courses are full. This must be based on graduation requirement category.	High						
98	The system allows courses to be assigned to a Department and House / Team. The system also allows the students to be scheduled by the House/Team.	High						
99	The system provides the ability to set a course priority for scheduling purposes.	High						
100	The system provides the ability to mass load, mass update, mass replace, and mass delete course requests.	High						
101	The system has the ability for students to be scheduled automatically from course requests any time during the school year.	High						
102	The system allows students to enroll in courses in district schools other than the school that the student is currently registered in. The system allows for cross-enrollment flexibility with the ability to track a student and all associated data regardless of where they are enrolled. The system provides clear indication of cross-enrollment status.	High						
103	The system allows the user to perform “what-if” analysis by running the master schedule builder multiple times, simulating the student requests into these schedules changing parameters each time. The system saves each master schedule and allow the user to choose which one to use as the master. The system provides the ability to easily compare different scenarios.	High						
104	Once the final scheduling run has been approved, The system allows the previous “what-if” versions to be purged.	Medium						
105	The system identifies potential conflicts by identifying a group of students requesting two or more of the same courses (i.e. if many students request both Orchestra and Honors Math. The system warns the user that there is a potential conflict with these two courses). The system has the ability to compare conflicts of a mass of students or individuals.	High						
106	The system provides a conflict matrix of each student with irresolvable conflicts, indicating all courses selected and corresponding master schedule class possibilities, and flagging master schedule classes that are filled.	High						
107	The system allows mass updating of the course catalog and master schedule.	High						
108	The system provides the ability to mass update and move students from one scheduled course into another.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
109	The system allows the prioritizing of individual students for scheduling and the flexibility of scheduling by building.	High						
110	The system provides the ability to print a room usage report, which lists the courses meeting in the room, the course code and description, meet schedule, seats used, and whether the course-section is full.	High						
111	The system provides a user-friendly means (e.g. one screen, one step) of entering course requests, modeling a schedule, and enrolling a student in a modeled schedule.	High						
112	The system has the ability for grades and assignments to be copied from a course that is dropped to one that is added.	High						
113	The Re-Enter Student/Re-Activate Schedule reactivates students withdrawn with the previous option. It re-enters the student in Demographics and makes them active, and re-adds all the saved courses, if class size allows.	High						
114	The system scheduling capabilities have no fixed limits for the number of periods per day or for the number of grading periods per year.	High						
115	The system supports multiple "time period" (aka bell) schedules.	High						
116	The system provides the functionality to handle multiple time schedules within the same building and multiple teams within a time schedule in a building.	High						
117	The system provides the ability to automatically assign students to a team based on a course selection.	High						
118	The system allows on-line schedule changes. Also, schedules are capable of being generated and printed immediately.	High						
119	The system has the ability to generate hall passes on demand based on the students schedule.	Medium						
120	The system allows the school to use the current year master schedule as a starting point for next year's master schedule.	High						
121	The system supports flexibility in the design of the students' schedules.	High						
122	The system supports scheduling of sequenced, co-requisite and pre-requisite classes. The system checks for course prerequisites before scheduling students. The prerequisites can be entered centrally in the course catalog.	High						
123	The system shall check that minimum criteria (i.e. passing grade) for pre-requisite course are fulfilled before allowing enrollment to dependent course.	High						
124	The system produces a warning message when the user attempts to request a course for a student that the student is currently taking.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
125	The system allows the user with the proper security to freeze (close) certain sections or courses during the scheduling process.	High						
126	The system provides mechanism to increase the likelihood that a section will fill (increase its priority).	High						
127	The system allows a report to be requested that lists the individual students' course requests and alternates, if any.	High						
128	The system provides an Alternate Course which identifies the course to substitute if the Student Scheduler is unable to schedule the primary request.	High						
129	The system has an option to allow alternate course requests only for elective courses.	High						
130	The system supports a building-specific course catalog (Name, description, state course id and name, subject/department, campus availability, fees, credits, pass/fail indicator, active/inactive course indicator, semesters or marking periods the course is offered, textbook title assigned to course, etc.).	High						
131	The system allows the authorized user to copy the course catalog from one year to another before editing.	High						
132	The system maintains courses from other institutions for transcript credit for transferring students.	Medium						
133	The system supports definition of required and elective courses.	High						
134	The system allows for a course to be inactive in the course catalog, without deleting the course.	High						
135	The system provides the ability to define a Block or Super Course that groups a number of courses for scheduling purposes.	High						
136	The system supports a mix of standard and blocked classes within the same schedule.	High						
137	The system supports all manner of traditional and non-traditional schedules including block, modified block, teaming, mosaic, and rotating schedules.	High						
138	The system has the ability to facilitate scheduling for teams or family style teaching. (Students from the same team receive teaching from the same group of teachers for core classes. For electives, students are able to receive teaching from non-team teachers.)	High						
139	The system has the ability to assign teachers to teams for family style teaching. If teachers are assigned to a team, the system is able to recognize the team and to give the teachers in that team a common prep period for planning purposes.	High						
140	The system has the ability to assign multiple teachers to a class for team teaching options	High						
141	The system provides the option for elementary scheduling (automated or manual).	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
142	The system supports developing a departmentalized Elementary schedule by homeroom, student group, or individual students.	High						
143	The system supports Elementary self-contained classes and departmentalized classes by grade level with each school.	High						
144	The system provides the option for homeroom assignments (mass or individual).	High						
145	The system provides the option to assign classes by homeroom assignment.	High						
146	The system allows assignment of multiple teachers or paraprofessionals for Elementary scheduling.	High						
147	The system allows mass assignment of counselors.	High						
148	The system allows individual course request entry as well as for a group of students or by grade.	High						
149	The system has an option to not allow or to warn counselor when a duplicate course request is entered.	High						
150	The system allows user with the proper security to easily and quickly replace a teacher with another. This includes movement of all teacher information, e.g. grade book.	High						
151	The system allows the withdrawal of a student, releasing their seat while preserving the students' schedule.	High						
152	The system provides separate schedules for current and next year scheduling.	High						
153	The system scheduling routine balances class enrollments by class section, so that a particular section of a class does not have a larger number of students than another section.	High						
154	The system has the ability to quickly add courses to a student's existing schedule or to drop courses from a student's schedule. When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department, etc. Moreover, the system helps the school personnel in deciding the courses that fit the student's schedule.	High						
155	The system provides a current enrollment summary of each course and section. The user is able to view or generate a printed report containing this summary information.	High						
156	The system provides online tally report to show the total number of course requests for each course updated real-time. The system provides drill-down capability from the tally into the students requesting each course. Also The system provides a hard-copy report of the simple tally by course number at each school, also by grade and gender.	High						
157	The system provides a free period analysis report, which summarizes the number of students who have a specific period free.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
158	The system provides a free time detail report, which shows the open periods in the student's schedule, per cycle day and grading period.	Medium						
159	Once a scheduling run has been completed, the system saves the completed students and then work with the incomplete students.	High						
160	The system provides schedule exception reports for students with under/over scheduled, open periods, taking courses already passed on transcript, etc.	High						
161	The system provides online, real-time access to various reports to assist with scheduling students, such as listing the catalog, master schedule, class lists, class roster, incomplete student schedules, room and teacher availability, etc., sorted by any field on the report.	High						
162	During the scheduling process, the system has a shuffle option that can be utilized. The shuffle option shuffles students from one section to another or reschedule students to improve the overall scheduling rate. The system allows for the option to not touch student who have been fully scheduled.	High						
163	The system allows for the addition of new courses and sections at any time during the school year.	High						
164	The system provides a "Teacher's Schedule" report that presents teachers' schedules in a list or grid format.	High						
165	The system has the ability to print schedules sorted by distributing period and date, by homeroom teacher, for future or current schedules.	High						
166	The system provides a "Seat Availability" report which lists requests and seat counts, including total seats, seats needed and seats available, for each course.	High						
167	The system provides scheduling performance statistics, including number and percentage of requests scheduled and students scheduled.	High						
168	The system provides class transfer history log indicating all changes by date.	High						
169	The system allows a school to define teacher restrictions, room restrictions, and class availability.	High						
170	The system has the ability to automatically make a first attempt at balancing classes based on gender, ethnicity, language, IEP, 504, new students, gifted students, etc. allowing user specification of the fields used to determine balancing.	High						
171	The system shall alert for ESOL and foreign exchange students, new students, etc.	High						
172	The system allows students to be pre-scheduled into a course-section before the scheduling algorithm is run.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
173	The system allows multiple meeting time sessions per course in the Master Schedule, allowing efficient scheduling of lab courses, double meeting time courses, and courses with split meeting times.	High						
174	The system allows combined class scheduling to allow multiple classes to be taught by the same teacher in the same period and room.	High						
175	The system has the ability to automatically remove the student from all of his/her scheduled classes and reduce the class sizes.	High						
176	The system supports alternate day bell schedules to accommodate early release days, testing days, or other district-defined calendar.	High						
177	The system automatically calculates Career Tech Hours based on the student's schedule.	High						
178	The system provides the ability to track a student's career or multi-year schedule plan and automatically update that plan as the student moves from year to year. The system allows the student/parent to update through the parent/student portal.	High						
179	The system should allow the ability to mass load student requests based on the students career or multiyear plan.	High						
180	The system produces a personalized list of suggested course election for a student based on the course offerings, student's graduation requirements, student's special needs (e.g. Individual Education Plan, Bilingual/ESL etc.), credits earned on the student's transcript, and student's current schedule. The suggested course election lists only those courses available to the individual student. For areas where the student can choose between multiple courses, each course is listed.	Medium						
181	The system provides an alert and report of students who didn't get a class that is necessary to meet graduation requirements.	High						
182	The system allows the user to define special room needs by course and teacher.	Medium						
183	The system allows for manually closing a section so that no students can be scheduled into that section.	High						
184	The system provides an easy method to view the number of times a certain course was requested as a primary and an alternate.	High						
185	The system provides a tally and report number of alternates substituted according to the primary course and the alternate course.	Medium						
186	The system allows the definition of required courses by student program, grade level, and graduation path.	Medium						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
187	The system allows scheduling for elementary school needs including selection, sorting and assignment by Grade level	High						
188	The system allows scheduling for elementary school needs including selection, sorting and assignment by Gender.	High						
189	The system allows scheduling for elementary school needs including selection, sorting and assignment by Ethnicity.	Low						
190	The system allows scheduling for elementary school needs including selection, sorting and assignment by Home Language.	Medium						
191	The system allows scheduling for elementary school needs including selection, sorting and assignment by District-defined Placement Classification.	High						
192	The system allows scheduling for elementary school needs including selection, sorting and assignment by Homeroom.	High						
193	The system allows scheduling for elementary school needs including selection, sorting and assignment by Core subjects.	High						
194	The system allows scheduling for elementary school needs including selection, sorting and assignment by Specialty and Pull-out classes.	High						
195	The system allows scheduling for elementary school needs including selection, sorting and assignment by Resource classes.	High						
196	The system supports the ability to track course prerequisites over multiple years.	High						
197	The system provides a secure web-site for entry of student course requests.	High						
198	The system provides a method for counselors to enter student requests on-line with a student.	High						
199	The system provides the ability to run the scheduler selectively by semester as an option.	High						
200	The system warns of Special Ed status when schedule changes are made for special Ed students.	High						
201	Special Ed courses are limited to Special Ed students. The system has the ability when entering course requests but can be overridden.	High						
202	The system provides the option to enter text describing the courses offered, which may be compiled and printed to serve as a course selection booklet.	High						
203	The system provides as an on-line interactive conflict matrix without printing a report. The system allows the user to drill down into the count to see the names and id numbers of students requesting the conflicting courses.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
204	The system has an interactive conflict matrix that allows one click lookup of individual students requesting each pair of courses.	High						
205	The system provides as individual student timetable grid with on-line feedback of class options and restrictions.	Medium						
206	The system allows course Fees to be tracked in the course catalog. These fees "pop up" as required during scheduling.	High						
207	The system indicates those classes which require a fee when the class is requested by the student, or entered by the counselor.	High						
208	The system provides the ability to track a teacher's Highly Qualified Teacher status and alert the scheduler when an unqualified teacher is assigned to teach a class.	High						
209	The system allows the user to define teacher qualifications and preferences to be used in scheduling.	High						
210	The system tracks the Teacher Certification number.	High						
211	The system has the ability to see open classrooms information for each period online (i.e. classrooms unoccupied, number of seats open in each period, etc.)	Medium						
212	The system has the ability to create teacher notifications that indicate both the old and the new course and section assignments when changing a course on a student schedule (changes report/email sent to teacher). This is be used to notify both affected teachers to help ensure that the student goes to the new class for which he has been scheduled.	High						
213	The system has the ability to make available the schedule for the transfer student in the former school online for the new school to refer to when preparing the student's schedule in the new school.	Low						
214	Student schedule changes are automatically reflected in teacher's grade book.	High						
215	The system has the ability to assign text books to courses in the master schedule (i.e., title of text adopted for course).	Low						
216	The system provides an on-line, interactive Master Schedule Builder program that builds the master class offering which are then used to do the actual student scheduling. Each school is allowed to define teacher restrictions, room restrictions and class availability.	High						
217	The Master Schedule Builder optimizes the placement of course-sections based on the student course requests and the school-defined restrictions to automatically assign courses into class periods.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
218	The system allows the authorized campus user to perform “what-if” analysis by running the master schedule builder multiple times, changing parameters each time. The system saves each master schedule and allows the user to choose which one to use as the master.	High						
219	The system supports the scheduling of courses of varying lengths such as full year, semester, trimester, and 9-week, grading period, and/or wheel courses.	High						
220	The system allows schools to load teachers and classrooms as resources and also, as an option, allow teachers and classrooms to be assigned to courses.	High						
221	The system has the ability for miscellaneous resources to be set up into groups, such as departments, which allows for greater flexibility when scheduling courses.	Medium						
222	The system automatically calculates how many sections of a course are required by comparing the number of student requests for a course with the maximum number of students allowed in the specified course, but allows user to override.	High						
223	The system allows courses to be scheduled in combinations, by specifying that certain courses must be scheduled during the same period, in the same room, and with the same teacher.	High						
224	The system provides reports to assist in determining any errors or questionable areas that need user intervention.	High						
225	The system allows course information can be copied from one year to the next.	High						
226	The system provides a ability to secure the teacher social security number so that it can only be seen by users with the proper security.	High						
227	The system has the ability to specify valid periods by courses or by section if applicable. Some periods defined in the system are only valid with certain courses. The system allows the user to note what periods are valid with each course or section. If no values are assigned, the system assumes that the course could be taught during any period.	High						
228	The system allows classes to meet non-consecutive periods (i.e.: first and third period, A-day and B-day).	High						
229	The system provides a utilization reports for teacher, room, or course.	High						
230	The system should allow the user to define on a teacher-by-teacher basis how many classes each teacher can teach.	High						
231	The system allows the user to build some of the sections or courses into the master schedule prior to building the rest of the master schedule. (i.e., in some cases, the user may know up front that a certain section of a course must be taught at a certain time of the day.)	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
232	The system allows assignment of teacher planning periods or other district-defined reservation labels before, during, and after scheduling.	High						
233	The system provides a the ability to inactivate a course by school year without deleting the course.	High						
234	The system provides a the ability to activate course by school year.	High						
235	The system has the ability to track instructional staff (ID, social security number, name, initials/short name, buildings, team, department, homeroom, teacher load, email address, etc.)	High						
236	The system provides the ability to assign a minimum of 4 staff members to a class with a staff role of each staff assigned.	High						
237	The system has the ability for, as an option, teachers to be automatically loaded against sections based on qualifications or user-defined selection.	High						
238	The system provides as for assigning individual students a scheduling priority.	High						
239	The system has the ability to identify which teachers are CTE (voc ed) teachers in current school year, including current license status and expiration.	High						
240	The system has the ability to report on percentage of CTE student participation as defined by Northshore SD for current and past years to qualify for Perkins Reserve Grant.	High						
241	The system provides a report that shows a graphic of master schedule--teacher, room, hour, course, section #. This includes highlighting classes that are full.	High						
242	The system moves the assignments with grades achieved on those assignments to a new class when the teacher is the same teacher for both classes.	High						
243	The system has an option to either track students or NOT track students as needed.	Medium						
244	The system has the capability to identify students who need to be separated when scheduling and maintain this separation for all classes.	High						
245	During the creation of the master schedule, the system allows the locking of specials (art, PE, music) into the students' schedules and the flexibility to change the core classes.	High						
246	The system allows administrators/counselors to easily view and print student's missing assignments and progress reports.	High						
247	The overall menuing system has simplicity and ease of finding information. It incorporates the use of "favorites."	High						
248	The system has the ability for teachers to have access to information such as counselor's observations, students' IEP and 504 plans with user defined restrictions.	High						
249	The system displays all information for a specific student on one screen.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
250	The system has the capability to link specific classes so that they will have the same teacher for both classes such as Communication Arts and Reading without tracking the students.	High						
251	The system has the capability to easily re-schedule a specific course, grade or school after the system has rolled over to the next year.	High						
252	The system has the capability to lock in schedules for specific groups of students (such as SPED) while modifying other students schedules during the scheduling process.	High						
253	The system allows "drag and drop" scheduling when creating the master schedule.	High						
254	The system has the ability to print D and F list from teacher gradebook in real-time on a daily basis.	High						
255	The system has the ability for Scheduler awareness of student requests or scheduled classes in other buildings and schedule around them.	High						
256	The system has the ability to schedule virtual classes without a period.	High						
257	The system has the ability to have a group of students and teacher flow in a class from year to years. (e.g. advisory class students have the same teacher all 4 years) AKA "cohort scheduling".	High						
258	The system has the ability for a course to include but not be limited to a course code, category/subject, title, description, course level (remedial, general, special ed, enriched, etc.) a sequence and sequence total (to allow determining if this is for example a 1 of 4 classes), credits possible, credit category by diploma, allowing multiple possible categories, grade level, targeted program(esl, special ed, gifted, migrant, at-risk, general, etc.), delivery type (e.g. virtual, distance learning, general, self-contained multi grade, self-contained single grade), college credit, vocational (approved not funded, approved and funded, exploratory not funded), state course code information, non standard flag, parent portal flag, display on report card, display on transcript, display on student schedule, requires counselor approval, include in GPA flag, honors flag, AP flag.	High						
259	The system has the ability for district defined courses by school level. Each school pulls from district course catalog by school level (HS, MS, ELEM).	High						
260	The system has the ability to create a report of student requests for a certain course (a low enrollment course that is closing and need a list of students who have requested it).	High						
261	The system has the ability to create a report of students by grade, counselor, homeroom, etc. who are missing period x.	High						

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Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
1	The system allows definition of a district-wide grade scale by school mtype (elementary, middle school, junior high and high school).	High						
2	The system supports a grade scale that allows definition of mark symbol (A, A-, etc), grade points, and whether or not the grade earns credit.	High						
3	The system allows modified grading scales by course.	High						
4	The system stores and retains Grade data by school year, so school district personnel can design and generate reports comparing grade information.	High						
5	For keying process, The system provides an easy posting routine for a specific interim period for each class and section. For each class section and student there is a code to identify students as failing, in danger of failing, or passing. A recommendation code as to what the student needs to do for the rest of the marking period is at least a two character code that is also stored in a table format. A projected grade that is validated against the grade reporting table is available for input. There is also be a narrative that can be inputted to explain the reason or actions the student needs to take.	High						
6	The system stores all cumulative credits earned.	High						
7	The system allows the guidance department to track the colleges applied, accepted, and attended. For each, the user needs to enter the appropriate dates.	High						
8	The system allows the guidance department to track scholarships awarded.	Medium						
9	The system provides the ability to keep an audit of Report Card Status. This keeps track of how records are used by the Student Scheduling and Grade Reporting modules. Example: The course is dropped in Scheduling, but remains active in Report Cards, the course is dropped from Scheduling and Report Cards, the report cards information for this course has been copied to another course, etc.	High						
10	The system provides the ability to create a report for Student ID List.	High						
11	The system provides the ability to create a report for Address list.	High						
12	The system provides the ability to create a report for Mailing labels.	High						
13	The system provides the ability to create a report for Student summaries.	High						
14	The system provides the ability to create a report for Grade record label.	High						
15	The system provides the ability to create a report for Activity list.	Medium						
16	The system provides the ability to create a report for College list.	Medium						
17	The system provides the ability to create a report for Scholarship list.	Medium						
18	The system allows notes to be included on report cards on a per school basis.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
19	The system allows the user to map district course equivalents for out of district transfer students.	Medium						
20	The system allows for courses on the student's report card to be sorted by building, course number and section or course description, period of the day, etc., or any combination as selected by the user.	High						
21	The system supports centralized district-wide production of Progress Reports and Report cards. Groups of schools can be processed separately. Mailings can be sorted by zip-code district wide. Each school is also be able to print their own Progress Reports and Report cards.	High						
22	The system allows a variety of marks per marking period as well as final grades to meet the needs of the district.	Medium						
23	The system allows a flag or mark to indicate a student's course is incomplete, withdrawn, or failure.	High						
24	The system provides the ability to automatically calculate letter, numeric, grade point, and credit equivalencies based on official grading tables.	High						
25	The system provides the ability to query students who are below and above a user-specified GPA or grade by single or multiple criteria (e.g., grade level, teacher, subject, alphabetically, D and F lists, etc.).	High						
26	The system provides the ability for each campus to define which of their grades will exclude students from any honor rolls.	High						
27	The system, optionally allows narrative comments to be printed in full text form on progress reports and report cards.	High						
28	The system provides the ability for comments to be automatically personalized using "gender smart" pronouns.	High						
29	The system provides the ability to print multiple district-defined messages on report cards.	High						
30	The system provides the ability to print the promotional status of a student on the report card.	High						
31	The system provides for data entry routines that allow for the entry of grades, comments, class absences (excused, unexcused, and tardy) by marking period, course, and student to occur in one process.	High						
32	The system provides the ability to identify students in danger of retention, or with other risk indicators such as home language other than English.	High						
33	The system provides a printable report that includes student, grades, and credits earned.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
34	The comprehensive system generates not only progress report cards at mid-marking period and on demand, but also on-demand interim period reports.	High						
35	The system's Interim Progress Reporting function supports all grading periods and multiple runs per grading period.	High						
36	The system allows all types of class absences to be shown on progress cards for each course-section for each grading period.	Medium						
37	The system allows users to copy comments from the Report Cards or allow them to enter separate comments for the Progress Report cards.	High						
38	Elementary grading rosters are automatically built based on scheduled homeroom.	High						
39	The system allows authorized users to enter grades for an individual student, for all students in a class, or for all classes taught by a teacher.	High						
40	The system supports all manner of elementary, middle, high school and alternative school grading scenarios.	High						
41	The system allows Pre-K and elementary grading using multi-level subject and curriculum frameworks.	High						
42	The system's Progress Report card feature allows the user to add grades, comments, and optionally absences for students enrolled in a specified course, with the ability to change grades, comments, and absences that have already been entered.	High						
43	The system allows attendance to be automatically transferred to Interim Progress Reporting.	High						
44	The system allows students to take courses in various buildings within the school district and have those courses listed on Progress Report cards printed in their home buildings.	High						
45	The system allows school-wide and grade level messages to be printed each interim period on the Progress Report cards.	High						
46	The system provides a comprehensive set of Interim Progress reports (e.g. the Progress Report Summary Report, the Progress Report Comment Usage Report, etc.).	High						
47	The Progress Report Usage Report contains enough information to be used for auditing purposes or for generating comparative studies of the information.	High						
48	When a course covers multiple subject areas, the system allows credit to be evenly split between areas, full credit to go to all areas, or credit to be allocated on an as needed basis in a defined order of hierarchy.	High						
49	The system identifies repeated courses.	High						
50	The system allows Testing information to be added to the report card.	High						
51	The system allows skills and standards-based grading and assessment.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
52	The system allows district defined standards.	High						
53	The system allows an unlimited number of Identifiers defined by the district. e.g., "Identifies the uppercase letter 'A'".	High						
54	The system allows printing Standards and Identifiers in multiple languages.	High						
55	Standards and Identifiers are assignable to multiple grade levels.	High						
56	The system provides the ability for Students to be automatically assigned the Standards and Identifiers defined for their grade level.	High						
57	The system allows district to define list of valid marks for individual standards.	High						
58	The system has completely configurable report card template capable of printing Standards, Identifiers, traditional grades for scheduled courses, attendance totals and comments.	High						
59	The system allows mastery, proficiency, and observational-based assessment.	High						
60	The system provides the ability to generate a letter to parents when their child is ineligible to participate in sports or other activities because of failing grades.	High						
61	The system provides the ability to generate reports and letters for failing students in order to properly notify and verify with student's parents/guardians.	High						
62	The system allows school level grade distribution analysis reports sorted by teacher and course.	High						
63	The system allows complete district level reporting, analysis, and data mining.	High						
64	The system provides for a grade summary report that includes all the students grades for each marking period along with absences, tardies, GPA's and class ranks for each of those GPA's.	Low						
65	If the solution has modules other than discipline, the district is able to hide the other unused modules from teachers on the website.	High						
66	Authentication through the teacher website is capable of integrating with Active Directory/LDAP.	High						
67	The system provides the ability to prevent (lock down) any teacher grade changes by a specified date.	High						
68	The system provides Cumulative GPA and marking period GPA's displayed by year and by school with GPA, quality points and the credits that were attempted.	High						
69	The system provides the ability to handle alphabetic, numeric or combination grading. Each school may have its own grading scheme; the system provides the flexibility to address the unique needs of each school, controlled at the district level.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
70	The system provides the ability to attach a minimum of 3 comments per course per grading period. There are unlimited comments that are district, building and user-defined.	Medium						
71	The system provides the capability of storing comment descriptions in multiple languages.	Medium						
72	The system shall provide Selected grade list.	High						
73	The system shall provide Grade distribution by class and by teacher report.	High						
74	The system shall provide Grade summary report that includes all the students' grades for each marking period.	High						
75	The system shall provide Honor Roll report - All "A's" in middle school.	High						
76	The system shall provide Grade collection forms for mass processing.	High						
77	The system shall provide Grade verification sheets after the grades have been scanned or keyed in.	High						
78	The system shall provide Report cards that address the secondary and elementary schools.	Medium						
79	The system shall provide Report cards in mail ready format.	High						
80	The system shall provide Class rank reports.	High						
81	The system shall provide Students missing marks/grades for a particular marking period.	Medium						
82	The system shall provide Special awards and Honors (National Merit Scholars, etc.).	High						
83	The system allows user defined letters to be sent at virtually anytime throughout the year. The letter is of a flexible format to include user-defined text, courses, teachers, projected grade, recommended course of action, and the reason for the grade.	High						
84	The system allows for the grades and comments to be keyed in.	Low						
85	The system provides the ability for the school to have separate tables to define the lack of progress codes and/or commendation codes.	High						
86	The system provides data collection forms available for easy data entry.	High						
87	The system provides a status report that lists all the students in danger of failing, failing and/or passing.	High						
88	The system provides detailed reports as desired by teacher and student.	High						
89	The system supports a flexible design of the interim progress and report card formats.	High						
90	The system allows for report card formats that meet the separate needs of elementary and secondary schools.	High						
91	The Report Cards package permits alpha-numeric grades, along with special characters (e.g. pluses and minuses).	High						
92	The system provides Report Cards that can be viewed on screen and printed for individual students, selected students, and in mass.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
93	The system provides Transcripts that be viewed on screen and printed for individual students, selected students, and in mass.	High						
94	The system provides the ability for parents or guardians to view transcripts on Parent Portal and print unofficial transcript.	High						
95	The system allows report cards to be sorted for distribution by allowing the user to select from various fields including building, a designated period of the day, student's name, grade, homeroom, homeroom teacher, zip code, etc., or any combination of the fields.	High						
96	The system supports a variety of marking period configurations.	High						
97	The system supports citizenship/conduct grades for each class and marking period.	High						
98	The system provides the ability to calculate the final grade automatically based on defined weighting of the components used and allows the final grade to be manually entered or overridden with a reason. The system has the ability to view audit trail of changes and activity.	High						
99	The system provides the ability to calculate the semester average automatically. Marking period and exam grades are given the proper weight (e.g. 25% for each of three marking period grades and 25% for the semester exam grade.) This is flexible and district-defined. The system allows the semester average to be manually entered or overridden.	High						
100	The system provides the ability for grade-related information for report cards to be imported/uploaded/posted from other packages, including semester and final grade averages for elementary campuses.	High						
101	The system allows final grades for a course to be computed from two, three, or four semester-long courses. The semester courses may be linked to Northshore SD state course code	High						
102	The system allows grades to be entered by either student or course.	High						
103	The system supports Northshore SD GPA types and provides rule based procedures that allows the district to exclude students for selected GPA calculations. Northshore SD has unique GPA calculations that the system should support. $\text{Weighted GPA} = (\text{number of weighted courses} / (\text{number of semesters} \times 7)) + \text{regular GPA}$	High						
104	The system allows calculation of interim GPA/numerical grade average as defined by Northshore SD. The final grade averages for seniors can be calculated after the end of the 5th marking period. Allow for saving the 5th marking period GPA for seniors.	High						
105	The system supports honor roll and GPA calculations based on any defined mark type such as marking period, semester, exam grade, or on the final grade, as well as cumulative honor roll. The system provides for exclusion of students from any of these calculations based upon district policy.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
106	Report cards can include transcript-like summary of full multi-year grading histories such as total credits earned, accumulative GPA.	High						
107	The system provides the ability for the district to determine, the honor point value of marks; how marks will be used in honor roll, GPA, and credit calculations (both full and partial credit); designate if the mark is a passing mark; and determine whether the mark or value should print on report cards. Different quality points may be awarded based on the type of course (whether a course is a regular course, honors, course, modified curriculum, etc.).	High						
108	The system provides the ability to produce Report cards and grade verification sheets for each grading period.	High						
109	The system supports alpha or numeric teacher comments per student, per course. Comment codes may be printed on the report cards.	High						
110	The system supports attempted credit and earned credit calculations.	High						
111	The system supports unlimited levels of non-weighted and weighted grades, and support district policies for calculating full (or partial credit optional).	High						
112	The system supports copying grades from a dropped course to the added course in one step.	High						
113	The system interfaces with Daily and/or Class Attendance, allowing attendance information to be printed on report cards. Attendance types for Daily and Class Attendance can be printed on the report card per student, per marking period. (e.g. excused, unexcused, tardy).	High						
114	The system supports students taking courses and programs on various campuses within the school district while having report cards printed by any authorized user regardless of building.	High						
115	The system provides for school district-controlled entry and update of student grades and GPA records. The system allows override of grade averages, attempted and earned credits, etc.	High						
116	The system provides missing grades report to determine grades that were not submitted.	High						
117	The system provides for user to report on selected grades such as Incomplete, or failing grades, or any other selected value.	High						
118	The system provides the ability to display all prior grading period report card information for current and prior years.	High						
119	The system allows for changing or correcting a student's mark after a mark reporting period by the authorized user.	High						
120	The system supports calculating and printing of various weighted and un-weighted grading	High						
121	The system provides the ability to notify specified users when classes with fees have been dropped.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
122	Application should allow a course to be included on Report Cards but excluded from Transcripts.	High						
123	The system provides automatic calculation for any grade type.	High						
124	The system provides the ability to save a "snap shot" of the class rank and view this information sorted in various orders. Example: By school, rank and school, grade, alpha order with averages, rank in class and official GPA.	High						

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Vendor Comments/ Proposal Section Reference

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Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system supports a flexible district-defined transcript format including, but is not limited to, student demographic and academic information, attendance, immunizations, standardized testing information, class rank, schools attended, district and school "transferred from", school's College Board Campus code number, state ID, comments, courses and semester and final grades received, earned credits, grade point averages, grand total credits, attempted credits, grade points and GPA, legend explaining district grade points. Courses can be listed in order by their assigned subject area or department.	High							
2	The system supports the ability to store and track for historical credit information: The course code and course title that was used when the student took the course.	High							
3	The system supports the ability to store and track for historical credit information: Grade level when the student took the course.	High							
4	The system supports the ability to store and track for historical credit information: The date the student completed the course, potentially independent of the end of the term.	High							
5	The system supports the ability to store and track for historical credit information: The letter grade the student received.	High							
6	The system supports the ability to store and track for historical credit information: The credits attempted	High							
7	The system supports the ability to store and track for historical credit information: The credits earned.	High							
8	The system supports the ability to store and track for historical credit information: The name and id number of the teacher.	High							
9	The system supports the ability to store and track for historical credit information: a course designator to identify the type of course.	High							
10	The system supports the ability to store and track for historical credit information: Whether or not the course is a vocational completer.	High							
11	The system supports the ability to store and track for historical credit information: The period the student was in when they took the course.	High							
12	The system supports the ability to store and track for historical credit information: The school that awarded the credit/course.	High							
13	The system supports the ability to store and track for historical credit information: Any Advanced Placement or International Baccalaureate number for the course.	High							
14	The system supports the ability to store and track for historical credit information: The state course code for the course.	High							
15	The system supports the ability to store and track for historical credit information: The grade points the student received as a result of the course and credit.	High							
16	The system provides the ability for each student the guidance department needs to track the colleges applied, accepted and attended. For each, the user enters the appropriate dates.	Medium							
17	The system provides access to and report credits earned/required by curriculum area by grade level for various sets of graduation requirements.	High							
18	The system maintains course history of classes taken in the district.	High							
19	The system maintains a history of credits from night school, summer school, correspondence, college, etc.	High							
20	The system maintains granted equivalent credits on students entering from outside the State/US.	High							
21	The system stores and calculates 2-digit course credits and 3-digit graduation requirements (i.e., 10.00 credits per course and 230 credits to graduate).	High							
22	The system allows for designation of the student's project year of graduation based upon their entry into 9th grade.	High							

23	The system allows for designation of the student's year designator associated with the student's graduation requirements. Typically graduation requirements are set based upon a year of graduation. This field then describes the graduation requirements year for the student.	High							
24	The system tracks the student's actual year of graduation.	High							
25	The system provides for on-line graduation verification.	High							
26	The system produces user-formatted transcripts and permanent records.	High							
27	The system produces transcripts interactively as well as in batch mode.	High							
28	The system provides credits earned, required, and needed by subject area.	High							
29	The system provides for a High School Planner sub-system.	High							
30	The system provides for alternative diploma earned.	High							
31	The system provides a Graduation date.	High							
32	The system provides the ability to keep requests by future grade level for students either by specific student or group of students.	High							
33	The system automatically converts planned future course requests for the coming course and/or by curriculum area.	High							
34	The system allows grade 8 students to create high school plans.	High							
35	The system allows the definition of various target plans by grade level.	High							
36	The system distinguishes between plans relating to high school graduation versus plans that relate to college or other post-high school program admission.	High							
37	The system allows access to scheduling records during the time that scheduling is being done so that counselor can see impact of decisions made during that process on the student's total plan.	High							
38	The system allows the assessment of student plans compared to various target plans and indicate deficiencies.	High							
39	The system produces high school plan reports.	High							
40	The system reports to students and parents on current student progress.	High							
41	The system reports to counselors showing current credit deficiencies by student.	High							
42	The system provides tallies of requests in next years plans to assist in master scheduling building.	High							
43	The system provides the capability to identify the credit earned for each course in the transcript/permanent record.	High							
44	The system provides the capability to place student demographic data in the transcript/permanent record.	High							
45	The system provides the capability to customize the header of the transcript/permanent record when printing.	High							
46	The system provides the capability to place cumulative attendance data in the transcript/permanent record.	High							
47	The system allows the user to place a student's class rank on the transcript/permanent record.	High							
48	The system provides the capability to identify the student's grade level at the time the course was taken, in the transcript/permanent record.	High							
49	The system provides the capability to identify the teacher name for each course in the transcript/permanent record.	High							
50	The system provides the capability to identify the grade earned for each course in the transcript/permanent record.	High							
51	The system provides the capability to identify the course section for each course in the transcript/permanent record.	High							
52	The system provides the capability to identify the course name or abbreviation for each course in the transcript/permanent record.	High							
53	The system provides the capability to identify the course number for each course in the transcript/permanent record.	High							
54	The system provides the capability to sort courses by user-defined course data criteria in the transcript/permanent record.	High							
55	The system provides the capability to sort courses by term as well as by year on the transcript/permanent record.	High							
56	The system provides the capability to sort by subject area (e.g. Math, Science,) in the transcript/permanent record.	High							

57	The system provides the capability to identify total credit earned by subject area in the transcript/permanent record.	High							
58	The system provides the capability to identify total credit earned in the transcript/permanent record.	High							
59	The system provides the capability to identify entry and withdrawal information in the transcript/permanent record.	High							
60	The system allows the user to enter and override a calculated GPA for an individual student on the transcript/permanent record.	High							
61	The system allows the user to enter and override credit awarded for an individual student on the transcript/permanent record.	High							
62	The system allows the user to place any GPAs calculated in the grade reporting module on the transcript/permanent record.	High							
63	The system provides the ability to place multiple grade legends in the transcript/permanent record.	High							
64	The system allows the user to place student-specific honors and awards identified in the activities module, into the transcript/permanent record.	High							
65	The system allows user-defined selections of immunization data to be defined in the transcript/permanent record.	High							
66	The system provides the capability to place general notes or comments in the transcript/permanent record.	High							
67	The system provides the capability to place current grade data and schedule in the transcript/permanent record.	High							
68	The system provides the capability to place the name of the prior school where a course was completed in the transcript/permanent record.	High							
69	The system provides a standard transcript/permanent record which allows user-defined sort features.	High							
70	The system provides the capability to identify the term the course was taken in the transcript/permanent record.	High							
71	The system provides the capability for user-defined selections of standardized test data in the transcript/permanent record.	High							
72	The system provides the capability to export transcript data in an electronic format.	High							
73	The system allows for the storage and reporting of the "Year" which indicates the year the student completed the course.	High							
74	The system provides the ability to create a report for Transcript.	High							
75	The system provides the ability for grade information to be available by year for printing on transcripts.	High							
76	The system allows, optionally, for withdrawn classes to print on the transcript.	High							
77	The system supports the transcript displaying current attempted and cumulative attempted credits, as well as, current earned credits and cumulative earned credits.	High							
78	The system provides system changes in an adequate and timely manner to comply with state-mandated changes and deadlines for any and all areas of grade reporting, transcripts, GPA calculations, ranking, graduation requirements, etc.	High							
79	The system maintains transcript records including grades and credits for courses taken in and out of the district.	High							
80	The system provides the ability for approved personnel to modify grades and transcripts (for an active student. The student's current school is the keeper for the student record and for an inactive student, the student's most recently attended school is the keeper of the student record).	High							
81	The system provides the ability to print comments and user defined fields on the transcript.	High							
82	The system provides the ability for when grade and credit changes are made, the student's GPA is automatically recalculated.	High							
83	The system has the ability to print test cores on student transcripts.	High							
84	The system has the capacity and capability to store all transcripts for an indefinite period of time.	High							
85	The system provides the ability to print electronic transcripts with seal and signature as well as unofficial transcripts.	High							

86	The system provides the ability to print progress reports, report cards, and transcripts on a laser printer with a forms overlay to optionally include a logo.	High							
87	The system supports printing numerous grade point averages on report cards and transcripts, both cumulative and current, weighted and non-weighted.	Low							
88	Cumulative GPA's is displayed and printed on transcripts by year and by school along with quality points and credits earned and attempted.	High							
89	The system provides the ability for grades to automatically post to student historical and transcript files.	High							
90	The system identifies courses taken during the summer sessions. Summer school courses are flagged on the transcript.	High							
91	The system provides the ability to track the teachers associated with each course in transcript course history.	High							
92	The system, optionally prints transcript by department instead of school year.	High							
93	The system provides the ability to view and print unofficial middle school transcript.	High							
94	The system provides easy access to all prior years grades, interim marks and assessment data.	High							
95	The system provides attendance information for each year with the information containing the school, marking period, grade level, and the total excused and unexcused absences.	High							
96	The system provides grade information by year, by school attended and for each marking period displays the course section, grade, earned credits, comment code and if credits were adjusted and why.	High							
97	The system provides the ability to calculate multiple grade point averages and store a minimum of 9 in the student's record for each individual marking period and semester and for a cumulative total.	High							
98	The system provides the ability to calculate the final grade automatically. Marking period and final grades must give the proper weight (e.g., final exam 20%, each of the four marking periods 20%). This must be very flexible and user-defined.	High							
99	The system provides the class rank to be tracked for each cumulative GPA stored.	High							
100	For each student, the system provides the ability for a user to be able to view the student's courses, grades, GPAs, and comments in a list form in report card style format.	High							
101	The system provides the ability for student GPAs, grades etc. to be viewed on the parent portal and be able to be printed in a report card format.	High							
102	For each student, the system provides the ability to easily change and identify a student's credits attempted for a specific class if different than the normal credits.	Medium							
103	The system provides for data entry routines that allow for the entry of grades, comments, class absences, and class tardies by marking period, course and student to occur in one process.	High							
104	In cases when a course is composed of a series of other courses, the system allows for the individual course to be correctly recorded for report cards and all other grade reporting reports.	High							
105	The system supports the ability to scan historical transcripts, creating a key of student number and name, and provide the ability to reproduce a historical transcript.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Graduation Requirements	Priority	Y	C	M	F	3	N	
1	The system tracks Graduation Requirements Year for each student.	High							
2	The student's graduation Requirement years links to a set of Graduation Requirements.	High							
3	These Graduation Requirements consist of credits for courses, assessments, and other non-course related requirements.	High							
4	The system will display whether or not a student meets the Graduation Requirement as defined for their Graduation Requirements Year.	High							
5	The process that determines a student's status towards Graduation Requirements uses a best-fit algorithm to determine which course to apply towards which requirement.	High							
6	The system tracks a Project Graduation Year for each student.	High							
7	The system tracks whether a student has graduated.	High							
8	The system allows for a particular Graduation Requirement to be waived for a select student.	High							
9	The system track multiple graduation plans for a student and identify deficiencies in each one.	High							
10	The system supports a district-defined Graduation Requirement code that identifies which set of requirements this student must fulfill to graduate.	High							
11	The system stores and calculates 2-digit course credits and 3-digit graduation requirements (i.e., 10.00 credits per course and 230 credits to graduate).	High							
12	The system has the ability for graduation status to be determined based on course requests for the upcoming school year(s).	High							
13	The system has the ability for current classes to be included or excluded when computing the number of credits earned.	High							
14	The system has the ability to analyze a student's course history based on different graduation rules/requirements.	High							
15	The system allows credits earned in a course to be automatically applied to a defined alternate area of study when all credit requirements for the primary area of study have been met.	High							
16	The system has the ability to assess students based on marks other than letter grades.	High							
17	Graduation verification can be performed on-line for individual students.	High							
18	The system has the ability to display and print a student's progress towards graduation, including the number of credits required, earned and needed in each area of study.	High							
19	The system provides a batch process for both individual students as well as selected groups of students.	High							
20	The system has the ability for individual users to include or exclude course history information from the on-line graduation verification display as well as from the batch report output.	High							
21	The graduation verification process can assess student graduation plans, compare them to various Graduation Rules, and indicate deficiencies.	High							
22	The system allows graduation requirements to be met in middle school. They can be included in the definition of Graduation Rules and considered when assessing a student's progress toward graduation.	High							
23	The system has the ability to automatically create course requests for all requirements not yet met, based on a student's graduation plan.	High							
24	The system provides a list of graduation requirements for each student that may be sorted alphabetically or by grade level.	High							
25	The system provides a list of students that includes credits required, earned and needed by area of study for selected grade levels, graduation requirements, etc.	High							
26	The system provides a list of students who will not graduate that includes a complete list of the graduation requirements each student has not met.	High							
27	The system provides a list of students who have not met all graduation requirements sorted alphabetically within the requirements they have not met.	High							

[illegible]

[illegible]

[illegible]

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Special Program Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to enroll students in any type of program the district offers.								
2	The system provides the ability for the district to establish a code table defining programs offered by the district.								
3	The system provides the ability to record the manner by which information about a student's potential need for special services was gathered. (e.g. education assessment, health assessment/screening, special education assessment/evaluation, staff refer								
4	The system provides the ability for the district to establish a code table defining identification procedure codes.								
5	The system provides the ability to record information gathered by a qualified evaluator about an individual's need for a special program/service.								
6	The system provides the ability for the district to establish a code table defining a student's special needs.								
7	The system provides the ability to record whether an individual is eligible to participate in a special program or receive support services.								
8	The system provides the ability for the district to establish a code table defining a student's Participation Eligibility Indicator.								
9	The system provides the ability to record the name of the individual or organization making the referral.								
10	The system provides the ability to record the reason that a student needs special or supplemental services. (e.g. academic difficulty, academic excellence/enrichment, language difficulty, etc)								
11	The system provides the ability for the district to establish a code table defining program participation reasons for use by the schools.								
12	The system provides the ability to record the month, day, and year on which a student is identified as being eligible to participate in special programs or to receive support services.								
13	The system provides the ability to record the month, day, and year on which a student begins to participate in a special program.								
14	The system provides the ability to record a description of the individual or institution providing services to the child.								
15	The system provides the ability for the district to establish a code table defining program providers.								
16	The system provides the ability to record the site or setting in which a child receives his or her services.								
17	The system provides the ability for the district to establish a code table defining program settings.								
18	The system provides the ability to record the type of organizational sponsorship of the program.								
19	The system provides the ability for the district to establish a code table defining program sponsors.								
20	The system provides the ability to record the primary method by which funds are generated in order to support a program.								
21	The system provides the ability for the district to establish a code table defining program funding sources.								

22	The system provides the ability to record description of the services provided to a student enrolled in a program.							
23	The system provides the ability for the district to establish a code table defining program services.							
24	The system provides the ability to record the number of minutes per week of service the student is receiving.							
25	The system provides the ability to record the name of the individual or organization providing the specific service.							
26	The system provides the ability to record the month, day, and year on which a student began participation in the program service.							
27	The system provides the ability to record the month, day, and year on which a student last participated in or received the program service.							
28	The system provides the ability to record the manner by which information about a student's participation and progress was gathered.							
29	The system provides the ability for the district to establish a code table defining program monitoring/evaluation methods.							
30	The system provides the ability to record further information or comments about the student's participation and/or progress in special programs.							
31	The system provides the ability to record the reason a student is no longer being served by a special program.							
32	The system provides the ability for the district to establish a code table defining program exit reasons.							
33	The system provides the ability to record the month, day, and year on which a student last participated in the program.							
34	The system needs to provide the facility to map the codes in the special program tables to state and federal equivalencies.							
35	Ability to calculate unduplicated total student counts							
36	Ability to record any changes by type of change, date, and by whom for each special program							
37	The system should allow for unlimited multiple occurrences of special program enrollment activity associated with each student.							

Student Information System Functional Requirements for NSD			One Res pon se per							
#	Special Education Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
General/Administrative Requirements										
1	The system allows tracking of students who are not attending (or only attending part-time) in the school district but who are receiving special education services from the school district.	High								
2	The system provides calendaring functions and calendars integrate with Microsoft Exchange.	High								
3	The system provides an audit trail for data updates and reports on systems usage.	High								
4	The system provides integration with attendance systems to display attendance data and history where appropriate in the special education demographic information or related screens.	High								
5	The system allows specified users to change processes due to changes in city/state/federal regulations.	High								
6	The system allows the ability to incorporate new IDEA changes as per relevant regulations.	High								
7	System provides search capabilities to review summary level information for any student in this system.	High								
8	The system provides all special education report requirements for state and federal reporting including appropriate enrollment reporting reports to include the P223H, Special Education Students Suspended/Expelled and Timeline for Initial Evaluation of Special Education and Transition from Part C to Part B by Child's 3rd Birthday reports.	High								
9	The system provides the capability of maintaining historical data.	High								
10	The system provides the capability to add and maintain new school sites.	High								
11	The system allows users to select multiple students based on queries and then perform work flow or status updates on the selected list of students.	High								
12	The system provides personalization features that allows each user to view their current case load.	Low								
13	System provides a complete history of all who access student info between various processes and functions.	High								
14	The system allows for the importing and exporting of Student Information and Special Education data.	High								
Document Management										
15	The system provides the ability to initiate, track, and print all documents related to an individual student.	High								
Reporting										
16	The system provides standard and user defined data types to support compliance reporting.	High								
17	The system provides an ad hoc query tool.	High								
18	The system provides the capability of selecting and printing multiple reports at one time.	High								
19	The system allows users to create, modify, execute, preview, and save queries.	High								
20	System provides report editors for Districts to change report designs based on changes in State or Federal reporting design/standards.	High								
Intervention										
Referrals										
21	The system allows for tracking of the Initial Referral Date to special education and the date of signed Consent for Evaluation.	High								
22	The system allows approved evaluators access to pertinent student information (security).	High								
23	The system provides configurable forms for entering and tracking preschool referrals for special education services.	High								
24	The system allows the tracking of critical dates of Intervention meetings.	Low								

25	The system allows reporting on intervention history during referral processing.	Low							
	Eligibility Determination								
26	The system allows the tracking of the Eligibility Type (Initial, Reevaluation, Waiver or Transfer).	High							
27	The system allows for the tracking of the Eligibility Meeting Date.	High							
28	The system provides the capability of entering the Eligibility Decision (IDEA, Ineligible, Section 504, Evaluation Terminated or Revoke Consent).	High							
29	The system allows the input of an Evaluation Extension code.	High							
30	The system allows the input of a Case Manager.	High							
31	The system allows the ability to record a student's primary State disability code.	High							
	IEP Processing								
32	The system allows the input of an IEP Start and End Date.	High							
33	The system allow for the input of an IEP Meeting Date.	High							
34	The system allows for the tracking of Parent Consent for Initial Services.	High							
35	The system allows for the input of a state defined LRE code.	High							
	Related Services								
36	The system allows for the creation of imbedded instructions and/or tutorials.	High							
37	The system allows for tracking of Special Education notifications and dates.	High							
38	The system provides user defined fields with user defined codes.	High							
39	The system provides the capability of log in information which is linked to SIS system. Same username and password. Single login preferred.	High							
40	The system provides the ability of controlling whether IEPs can be altered once completed. Administrator can re-open an IEP.	High							
	Placement								
41	The system provides a record of all schools, settings in which the student has been placed throughout his/her pre-K and school age history in special education.	High							
42	The system allows reporting on the student's current attend location.	High							
47	The system allows the user to forward pertinent student information to evaluators	High							
48	The system will identify students due for reevaluations or triennial evaluations	High							
49	The system monitors evaluations through automatic notifications to users for critical upcoming milestone dates	High							
50	The system can track and maintain evaluation results	High							
51	The system enables a school representative to access individual assessment reports from all evaluators	High							
52	The system can allow a user to track assessment type and data	High							
53	The system supports the ability to retrieve relevant assessment data	High							
54	The system allows a user to track completion date of evaluation	High							
55	The system can allow the capability to input the initial evaluation, and IEP Development Meeting on the same meeting date and time	High							
56	The system supports Functional Behavioral Assessment results	High							
57	The system provides an alert on assessments that determine eligibility prior to the 60-calendar day deadline from the receipt of parental consent to evaluation of the student	High							
	Eligibility Determination								
58	The system accommodates communication/collaboration on IEP development across parents, general education teachers, special education teachers, related services providers, school psychologists and others	High							
59	The system can alert users about eligibility timelines from a given process start and completion	High							
60	If student is not eligible the status should carry over to the detail screen as 'not eligible'	High							
61	The system tracks all outcomes for the eligibility meeting	High							
62	The system tracks student's primary and secondary disability categories and conditions	High							
63	The system generates a future IEP meeting and future re-evaluation meeting date	High							

64	The system will alert the user that an IEP meeting must be held within 30 days for students who come from other District(s) and have an IEP to determine continuing eligibility for receiving special education services	High							
65	The system maintains data on prospective eligible infants for early intervention services	High							
IEP Processing									
66	The system provides the ability to access and review current and past IEPs	High							
67	The system stores previous IEPs completed in the system at earlier dates	High							
68	System allows schools to scan and store IEPs developed in other districts to be added to the students' file.	High							
69	The system allows current updates to be made based upon changing IEP formats and standards	High							
70	The system allows more than one user to access and edit different sections of the IEP simultaneously	High							
71	The system provides document version management to ensure the "final", signed IEP is not modified without due process	High							
72	The system allows the user to print blank IEP forms	High							
73	The system provides a final review, modification, edit, spell check of any document available to the user prior to printing	High							
74	The system provides alerts, which notify users of incomplete IEPs and state reporting requirements	High							
75	The system allows for the update of the annual review date needed for compliance	High							
76	The system flags each required field on the IEP	High							
77	The system prevents the acceptance of contradictory or invalid entries, i.e. a related service cannot begin on a holiday	High							
78	The system maintains data related to extended school year plans	High							
79	The system can report data about extended school year accommodations	High							
80	The system can report on separate pieces of the completed IEP (e.g. accommodations)	High							
81	The system can report when IEP due date is out of compliance	High							
82	The system can escalate transportation requests to appropriate individuals and levels, including specialized equipment necessary	High							
83	The system can catalog lists of assistive technology devices including product descriptions	High							
84	The system allows the user to maintain an inventory of assistive technology devices	High							
85	The system tracks students requiring assistive technology	High							
86	The system allows the user to develop individualized transition plans (post secondary outcomes, transition services, criteria and responsible agencies providing services)	High							
87	The system tracks transition statement or plan recommended	High							
88	The system allows the IEP developer to reference state and local instructional goals and objectives and other district databases designed to address special needs and add them as appropriate to the student's plan	High							
89	The system allows the user to generate printed progress reports that are tied to the IEP goals and objectives	High							
90	The system has the capability to track progress reporting from IEP goals	High							
91	The system allows the user to create user-defined queries based on any grade and progress report element	High							
92	The system can generate a Summary of Performance document for students who are exiting special education	High							
93	The system needs to support more than one IEP format i. e. disability based, gifted, transition.	High							
94	The system can support the development of all aspects of Section 504 Plans, including tracking and monitoring IN SIS	High							
Related Services									
95	The system can report on related service by student ID	High							
96	The system will report on related service by related service type	High							

97	The system will report on related service by provider name and ID	High							
98	The system can maintain provider information including credentials and licensure	High							
99	The system allows district level users to view related service providers' schedules	High							
100	The system will report first attend dates for all related services per student	High							
101	The system allows user-defined authorized personnel to have access to special education classroom caseload data	High							
102	The system tracks related service provider's notes on students' receipt of services	High							
103	The system allows any related services provider to enter related services attendance information	High							
104	The system provides alerts for students who are not attending required IEP services	High							
105	The system allows the user to track all service costs which a district can bill to a third party including all state and federal reimbursable Special Education services.	High							
106	The system allows the user to track all state and federal reimbursable services on a student including the student's identification number and/or social security number.	High							
107	The system has an online (web-based) encounter attendance capability.	High							
108	The system will report attendance encounters by provider/student/school/agency	High							
109	The system provides for an electronic service log data entry and allows existing staff to enter reimbursable activities. Staff providers can be special education or general education personnel.	High							
110	The system identifies and alerts the staff of under-reporting services.	High							
111	The system allows for the creation of imbedded instructions and/or tutorials.	High							
112	The system imports the current picture of the student into the IEP.	High							
113	The system allows for the creation of an IEP at a glance.	High							
114	Log in information is linked to SIS system. Same username and password. Single login preferred.	High							
115	Staff inputs data into IEP screens that look the same as the finished product.	High							
116	IEPs cannot be altered once completed. Administrator can re-open an IEP.	High							
Placement									
117	The system maintains a record of all schools, settings in which the student has been placed throughout his/her pre-K and school age history in special education, including case managers	High							
118	The system generates forms to parents for permission to place students	High							
119	The system generates forms to parents for permission to change the placement of students	High							
120	The system tracks Manifestation Determination Review (MDR) data	High							
121	The system provides online MDR forms (Manifest Determination Review).	High							
122	The system can report MDR data	High							
123	The system can print MDR forms	High							
124	The system can track service provisions at any location identified	High							
125	The system can report on current attend location	High							
126	The system can accept changes to IEP placement information with proper user authorization	High							
127	The system can inform the user of procedures to follow to change current IEP information	High							

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Behavior Records Requirements		Y	C	M	F	3	N	
1	The system provides all of the state required data should be included in the information entered by a school when reporting an incident: school year, building (default automatically), incident number (created by system using district wide numbers), offense code , the date, time, location , reported by (from menu), reported to (electronically), weapon type (if applicable), and free text to describe incident details. There should also be the option to enter police contact information such as date, time , investigator type, investigator name, badge and name of police department. Attached to this incident should be all offenders, victims and witnesses with the actions taken and parent/guardians contacted.	High							
2	The system allows district-specific fields to be defined for storing additional data about incidents, offenders, offender actions, victims, victim actions, and witnesses.	High							
3	The student discipline module must allow the school and district to standardize its approach to categorizing infractions and the disposition for different levels of an infraction.	High							
4	The system provides a simple posting routine must be in place that will allow the user to add the infraction date, time, infraction type, student, location, staff reporting the infraction, free-form comment of what happened, the disposition, re-admission date, disposition date, time, and	High							
5	The system provides a for searching for groups of students users should be able to search for students by ID, name, type of infraction, re-admission date, disposition date, disposition code, compliance status and teacher reporting or monitoring the transaction.	High							
6	The system provides a posting routine that has default codes when appropriate that are determined at the district level and can be mapped to district discipline codes.	Medium							
7	The system provides a view where the administrators see all of the information on a student's discipline at one time. This will include all the information that is part of the posting routine.	High							
8	The system provides a display all offenses associated with an incident when viewing the student profile.	High							
9	The system should have the ability to view discipline information for a range of dates (current and previous years) for any combination of schools.	High							
10	The system includes a report of detailed discipline incidents with all incident information by school, student, infraction, disposition, action type, infraction teacher, and disposition teacher.	High							
11	The system includes a report of infraction statistics .	High							
12	The system includes a report of disposition statistics.	High							
13	The system includes a report of discipline letters to address by range of disposition codes., disposition starting and ending date, infraction codes and their respective starting and ending dates.	High							
14	The system is incident driven with each incident allowing multiple offenders, witnesses, and/or victims.	High							
15	The security system ensures that only authorized school district personnel can access this highly confidential information. Building access restrictions provide security against unauthorized inquiry or changes to student and/or incident records.	High							
16	The system allows a discipline entry to be initiated by student name or student ID.	High							
17	The system prompts the user to add an offender, victim, and / or witness when entering an incident.	High							
18	The system provides a automatic generation of incident tracking numbers at a district level.	High							
19	If the student is special education, the system will notify the person entering the incident when the student has a designated number of days of out of school suspensions.	High							

20	The system displays special education or 504 designations regarding the student when entering an action item.	High							
21	The system allows multiple occurrences of any action to be assigned to an offender and allow these actions to be scheduled.	Medium							
22	The system provides a consistent means of tracking the final result of the offender's action.	High							
23	For each Offender's Action, the system allows the user to specify the length of actual duration if it differs from the original assigned length of time and the reason why the action time was shortened.	High							
24	For each Offender's Action, the system allows the user to specify the duration of the action assigned	High							
25	The system is capable of storing and displaying information about each Offender's Action (e.g. action number, action code, action building, duration scheduled, duration actual, duration reason, disposition code, occurrences total, and occurrences outstanding).	High							
26	The system is capable of entering the scheduled and actual dates / times for the actions assigned to the student. This includes allowing multiple occurrences for a single action.	High							
27	The system is capable of automatically generating an email to the parents / guardians when a discipline event occurs.	High							
28	The system prompts the user to add actions when an Offender has been added.	High							
29	The system provides a user-friendly means of obtaining further details regarding individuals involved in the incident, guardians, district-defined information, additional code information, and duration information.	High							
30	The system is capable of automatically generating different notification letters and emails for parents or guardians when a student accumulates a certain number of actions and/or offenses.	High							
31	The system is capable of generating discipline letters and emails to multiple parents and/or guardians.	High							
32	The system is capable of generating discipline letters in multiple languages.	High							
33	The system provides the ability to generate a campus report that includes incident information (e.g. offenders, victims, witnesses) based on the building and classroom in which the incident is associated.	High							
34	The system is capable of producing a report that provides the total number of incidents by incident type per month and the average number of incidents per day for the incident type. The report includes a total and daily average for a building and for all buildings included in the report.	High							
35	The system allows campuses to produce a report that lists the students who are assigned to serve disciplinary actions each day within a specified date range.	High							
36	The system supports the ability to track discipline infractions other than those required by the state department of education.	High							
37	The system includes security so that only authorized school district personnel can access this highly confidential information.	High							
38	The system allows the teacher to be able to create an electronic referral that can be completed by an administrator to generate a Discipline Incident in the Discipline System.	High							
39	The system creates an email notification sent to the appropriate administrator whenever a teacher referral has been sent.	High							
40	A teacher can generate e-mail to parents/guardians whenever classroom discipline events occur.	High							
41	The system has a display of all students who have been reported as victims and a victim report by school and by student to aid counselors in helping students.	High							
42	The system tracks minor incidents (perhaps notes) that do not need to be entered as formal incidents but need to be tracked for number of occurrences. A report of these notes (minor incidents) for an individual should be available for printing.	High							
43	The system has a report of all special education students with incidents for a specific date range.	High							

44	The system allows for multiple offenders to be attached to an incident and different actions (Disciplinary measures) to be assigned to each offender.	High							
45	The system allows for multiple actions (disciplinary measures) to be assigned to an offender for a specific incident and all actions must be recorded and displayed when viewing the student profile and in reports. The information that should be recorded for each incident are: action type, date action (disciplinary measure) begins, number of days of the action with the end date automatically calculated by the system and who assigned the action(s).	High							
46	The system displays guardian/parent information when entering an incident to indicate as to when the parent/guardian was contacted, the date and time and the type of contact made (phone, email, letter, etc.).	High							
47	The system must generate an incident report for building administrators that includes the information needed for their end of the year NCLB reports.	High							
48	The system requires the entry of a Weapon, if a particular offense code is entered.	High							
49	For each action type entered in the system codes, there must be an indicator if this action when assigned should be calculate the end date of the action based on calendar days or school days.	High							
50	The system codes for Offense types and Action types must have a mapping to state codes.	High							
51	The system should automatically create an in-school-suspension list for the day by school to be used by the in-school suspension supervisor.	High							
52	The system can produce a report of the number of offenses sorted by the "reported by" person with drill down capability to see specific incidents.	High							
53	The system can produce a report of the number of offenses by team for a specific date range. The report would include date, type of offense and action taken and duration of action.	High							
54	The system should have an electronic response function where an administrator can respond to the teacher's electronic referral with the action taken	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to store: physician/health provider name	High							
2	The system provides the ability to store: physician/health provider address	High							
3	The system provides the ability to store: physician/health provider phone number	High							
4	The system provides the ability to store: preferred hospital	High							
5	The system provides the ability to store: dentist name	High							
6	The system provides the ability to store: dentist address	High							
7	The system provides the ability to store: dentist phone number	High							
8	The system provides the ability to store: health insurance company	High							
9	The system provides the ability to store: health insurance plan #	High							
10	The system provides the ability to store: health insurance coverage status (yes or no for have health insurance)	High							
11	The system provides the ability to store: school insurance status (yes or no)	High							
12	The system stores and reports "Medicaid Status" which indicates the Medicaid status of a student.	High							
13	The system stores and reports "Medicare Status" which indicates the Medicare status of a student.	High							
14	The system has the ability to record multiple health concerns for each student	High							
15	The system allows for District table driven health concern codes and descriptions	High							
16	The system provides the ability to store Health Concern date recorded	High							
17	The system provides the ability to store Health Concern narrative comments	High							
18	The system provides the ability to store Health Concern severity flag for medical alert (including life threatening)	High							
19	The system provides the ability to store Health Concern confidentiality level code	High							
20	The system provides a place to track outside referrals and critical health issues.	High							
21	The system provides a flag to indicate nursing service level required for student (to be manually entered)	High							
22	The system provides a flag to indicate if student requires daily medication administered at school (yes/no)	High							
23	The system provides multiple flags to track specific District table driven medical conditions (for example, wears glasses)	High							
24	The system provides the ability to record date of last physical exam	High							
25	A complete student health history can be maintained with reporting capabilities that alert staff of the daily needs of individual students, such as medications required to be administered.	High							
26	The system provides the capability to log medication administration.	High							
27	The system provides the capability to alert when a student is scheduled to receive medication.	High							
28	The system provides the ability to record multiple immunizations/vaccinations	High							
29	The system allows for District table driven immunization/vaccination codes and descriptions meeting Washington state requirements	High							
30	The system allows for noting a student is immune to a vaccination								
31	The system provides a waiver/exemption may be recorded for each immunization/vaccination	High							
32	The system provides a waiver/exemption date may be recorded	High							
33	The system allows for District table driven (status) reason codes and descriptions for waivers/exemptions	High							
34	The system provides narrative comments to be tracked for waivers/exemptions	High							

Student Information System Functional Requirements for NSD				One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
35	The system tracks all immunizations according to Washington state requirements	High								
36	The system tracks each immunization inoculation by vaccine type	High								
37	The system tracks immunization inoculation by administration date	High								
38	The system provides the ability to store Immunization: Diphtheria	High								
39	The system provides the ability to store Immunization: Tetanus	High								
40	The system provides the ability to store Immunization: Pertussis	High								
41	The system provides the ability to store Immunization: Polio	High								
42	The system provides the ability to store Immunization: Measles	High								
43	The system provides the ability to store Immunization: Mumps	High								
44	The system provides the ability to store Immunization: Rubella	High								
45	The system provides the ability to store Immunization: HIB	High								
46	The system provides the ability to store Immunization: HepB	High								
47	The system provides the ability to store Immunization: MMR (combination Measles, Mumps, and Rubella)	High								
48	The system provides the ability to store Immunization: DTP (combination Diphtheria and Tetanus)	High								
49	The system provides the ability to store Immunization: MR (combination Measles and Rubella)	High								
50	The system provides the ability to store Immunization: Varicella									
51	The system includes the ability to generate form letters to parents/guardians	High								
52	The system includes the ability to generate mailing labels for any letters generated by system	High								
53	The system provides automatic compliance evaluation reports.	High								
54	The system generated compliance report/displays have an option to include or exclude students with waivers/exemptions	High								
55	The system provides the ability to automatically re-calculate a student's compliance status for a change in birthdate.	High								
56	The system provides the ability to automatically re-calculate a student's compliance status for a change in grade level.	High								
57	The system allows for compliance checking by grade level (students in one grade level may have different immunization requirements than students in another grade level).	High								
58	The system provides susceptibility reports(I.e., all students not immunized, including students with waivers/exemptions)	High								
59	The system has the ability to run report for multiple diseases	High								
60	The system provides the ability to run report for district or for specific school(s)	High								
61	The system provides the ability to select creation (or omission) of form letters for those deemed susceptible	High								
62	The system allows immunization form images to be stored in the system	High								
63	The system provides the ability to record multiple exam/screening records for each student	High								
64	The system allows for District table driven exam/screening codes and descriptions	High								
65	The system provides the ability to store Health Screening: date of exam/screening	High								
66	The system provides the ability to store Health Screening date of results of exam/screening	High								
67	The system provides the ability to store Health Screening results of exam/screening	High								
68	The system provides the ability to store Health Screening narrative comments for exam/screening.	High								
69	The system includes the ability to scan and store exam/screening information	High								
70	The system provides the ability to flag and report exam/screening failures	High								

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
71	Information must be present that identifies dates for vaccinations, vision, hearing, examinations, other medical screenings that may be required in the future, free form for comments, allergy information, dental card entry and physician's name and telephone number from one summary screen in the student's data section. This should also include the student's picture. Student's Picture should also display on the medication page.	High							
72	Provide extensive standard and customizable reports (including Immunizations, Complete Health Record, Screening, Incidents, Daily Log, Statistical, Year End and Letters). Reports can be run for a selected group of students based on user-defined criteria.	High							
73	System should provide for access security at the field level for medical records.	High							
74	A school and sports injury system is also desired to track injuries, health examinations for eligibility, insurer covering the injury, and a free form for comments that describes how the injury occurred. This should be a drop down selection on the log for accidents on nurses log that could be forwarded to safety and security manager.	High							
75	There are numerous reports that are required on an adhoc basis. General ad hoc abilities must allow for information to be reported on user defined criteria and flexible enough to allow for future reporting.	High							
76	The system provides a report of previous nurse visit history.	High							
77	The system provides a report of students who require medication	High							
78	The system provides a report of exemption	High							
79	The system provides a report of immunization list	High							
80	The system provides a report of students missing immunization list	High							
81	The system provides a report of health and physical examination list	High							
82	The system provides a report of summary of the student's health and medical data	High							
83	The system provides a report of sports participation	High							
84	The medical module is fully integrated with the demographic data with security levels to maintain confidentiality.	High							
85	The system has the ability to track screenings with their dates, results, location, and the grade the student was in at the time.	High							
86	The system allows for district-defined medical screens and fields.	High							
87	The Office Visits screen allows the user to enter basic information about medical office visits for multiple students on one screen.	High							
88	The system has the ability to maintain open records for multiple students at one time providing effective triaging of students.	High							
89	The system has the ability to track building, date, time, reason, examiner, referral data including the number of referrals and follow-ups to the referrals, location, examination data, and treatment information (including medication and dose) for the office visit. Includes free form text field for additional notes.	High							
90	The system has the ability to add any new medications to lists of prescribed medications as new medications are being FDA approved; treatments such as dressing changes-if come in for frequent or daily nursing care; formula feedings in G-tubes; and other daily frequent care that may arise, must be able to view all past visits including past schools.	High							
91	The system has the ability to generate user defined medical alerts.	High							
92	The system has the ability to generate alerts to follow-up on medical referrals and input follow-up information.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
93	The Office Visit area includes fields to record additional information such as blood pressure, pulse, temperature, respiration, blood sugar, testing results, carbs and free text comment with no limit.	High							
94	The system will generate a daily medication log that can also remain open throughout the working session.	High							
95	From the Office Visit screen, the user can easily view the prior visits and medical information for a student.	High							
96	The system allows for full immunization histories for shots and immunization series requirements.	High							
97	The system automatically calculates immunization compliance on-screen based on specific state requirements to determine which students are not up-to-date and which ones are complete. System must be easily configurable to make changes in State requirements. Should also have free text field for notes.	High							
98	Immunization criteria can be configured to meet individual district requirements, using student's age, grade, date of birth, grade period date, etc.	High							
99	The system supports Immunization schedules, as defined by the CDC and the Department of State Health Services), will be preloaded when the system is installed and updated by the company as changes occur.	High							
100	The authorized user may check selected groups of students to check for immunization compliance. The user may select which series and which schedule should be used.	High							
101	The system allows multiple requirement schedules to be set up for the same immunization series for when there are different requirements at different ages, such as more stringent requirements for younger students.	High							
102	The system is capable of maintaining immunization schedules for both minimum and recommended requirements. The recommended schedule should include doses at specified ages, for students who started immunizations on time. The minimum schedule should identify the minimum time intervals needed between doses, for students who started their immunizations late.	High							
103	The system allows a grace period calculated per day and allows for a minimum number of shots.	High							
104	The system allows an alternate dose that can be defined to can count toward satisfying a series requirement.	High							
105	In order to satisfy immunization requirements, a shot can be counted toward more than one series, or it may be tracked as part of one series, but it may also be counted as a series itself.	High							
106	The system tracks religious and medical exemptions.	High							
107	The system allows additional information to be entered for each shot such as referral information, follow-ups, free text area, etc.	High							
108	The system allows letters to parents/guardians to be generated for students with immunization delinquencies. A report listing these students and their delinquencies will also be provided.	High							
109	The system has the ability to print immunization notice letters to the parent with a current copy of the complete immunization record on file and available resources to obtain immunizations needed.	High							
110	The system has the ability to view and print complete immunization records for each student.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
111	The system allows medical records to be maintained for withdrawn students as well as currently active students.	High							
112	The Growth screen includes the student's height, weight, calculated percentile, and BMI.	Medium							
113	The system automatically pulls the student's growth percentile from the percentile table using the student's age as of the date of the exam. The percentile table includes ages up to 21.	Medium							
114	The system allows screen specific notes areas to be available. E.g., in clinic visits, immunizations, medical alerts, screenings.	High							
115	Wherever possible, mass add/update utilities assist the user to make repetitive entries/updates for a selected group of students. The user can override individual student's data. Such data should include immunizations, shots, growth, dental, vision, hearing, prescribed and OTC medication, district-defined screens, etc. System should allow to mass update/add for 2 or more options at the same time, e.g. mass load vision and screening for all 5th graders with a default of pass. System should be configurable to add additional data elements.	High							
116	If any medical information is shared with the Demographics module such as Emergency Contacts and the data is changed in either module, the update appears in the other module.	High							
117	Authorized users maintain the district's validation tables for medical codes throughout the medical system.	High							
118	The system security will allow authorized users of the Student Demographics module to view or update Emergency Contact information while restricting their access to confidential medical information.	High							
119	The system has the ability to generate accurate and reliable reports of all KS state mandated screenings, immunization records including overdue list, individual student clinic visits, and medical alerts.	High							
120	Produces Growth Chart in graph format. The growth chart can be produced in a printable format. This not an immediate requirement.	Low							
121	Produces a Growth Chart report that prints the student's height and weight, percentile, and BMI as recorded on the Growth screen. This not an immediate requirement.	Low							
122	Meets all State Department of Education health reporting requirements.	High							
123	The system has the ability to generate accurate and detailed monthly district level reports.	High							
124	The system has the ability to run confidential reports on selected students and provide to teachers as needed.	High							
125	The system must be able to provide the ability to completely and descriptively document student medical office visits, independent health plans, referrals, follow up care, student incidents and state mandated required screenings.	High							
126	The system has the ability to have efficient access to query for student information.	High							
127	The system has the ability for logical flow through the program. The program must be user friendly not requiring extensive training or understanding of technological language.	High							
128	The system has the ability to generate and access individual health plans as part of the student's medical record.	High							
129	NIC-NOC and NANDA nursing standardized language preferred for nursing diagnoses, health care plans, and abbreviations.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
130	The system should be able to maintain and store a standardized health care plan per student and have the ability to check off progress within the plan and modify. It should have an option to connect to IEPs and 504. User should be able to click on links or alerts to view the health care plan while being able to view previous history.	High							
131	The system has the ability to chart and print detailed information regarding student's individual office visits, daily medication logs, accident reports, blood pressure logs, glucometer reports. Should maintain user defined fields for daily logs such as a diabetes flow sheet.	High							
132	The system has the ability to efficiently access, verify, enter data and print all information on a student medical record.	High							
133	The system allows convenient analysis of documented data (i.e. analyze frequency and reason for clinic visits) review follow-up for medical concerns.	High							
134	The system produces professional reports, form letters and immunization notices.	High							
135	The system has the ability to scan forms/information into the clinic visit screen and attach to the student record.	High							
136	The system has the ability to scan or enter the student ID number for students information and data entry, (i.e.. Medical alerts, individual clinic visits, etc.)	High							
137	The security of medical information must comply with FERPA requirements.	High							
138	The system has the ability to generate a Medicaid billable report. The report must include the nurses name and credentials.	High							
139	System should be able to integrate with the Green Bush Medicaid billing system. This is used to track Medicaid eligible students with special health care services that are Medicaid reimbursable and directly related to special education.	Medium							
140	The software is able to easily import and export data to and from student files maintained in other medical packages.	High							
141	The vendor maintains and implements all new state requirements in a timely manner.	High							
142	The system allows access daily attendance to track students. Nurses should be able to notify teachers and administrators that students are in the nurses office.	High							
143	The system has the ability to create a report for teacher for field trip with medical info, emergency contacts, and all health insurance information. This should be viewable using a mobile data device.	High							
144	The system will generate a report when there is 5% change from day to day (or total of 10%)of student absences to notify health department.	High							
145	When entering nurses visits/logs allow partial entry of student name without the need of a wildcard. System should facilitate smarter searches.	High							
146	The system allows use of tab button to navigate across a record on the nurses visits log.	High							
147	The SOAP (Subjective Objective Assessment Plan) section to have the option to check common assessment, interventions such as 2 acetaminophen, 1 ibuprofen, cough drops, febrile, color pink, alert, etc.	High							
148	The system provides a default nursing diagnosis like "Health Maintenance Altered" should come up and nurses have the ability to change it as needed.	High							
149	The system includes the ability to spell check.	High							
150	The system allows cut and paste from other programs such as Word, Excel, or PDF into the SOAP and vice-versa.	High							
151	The system maintain a calendar of scheduled medications which include medication, dosage, frequency, route, etc.	High							

Student Information System Functional Requirements for NSD				One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
152	The system allows auto save options on all screens.	High								
153	The system allows tracking of PRN medications (i.e. pain medication, cough medication, etc.)	High								
154	The system allows tracking of Blood Pressure and other health concerns as needed.	High								
155	When querying health screen results, ability to pull up failed with correction and failed - corrected at the same time.	High								
156	The system has the ability to define, alert and print life threatening conditions.	High								
157	The system has the ability to directly email a student's teachers and/or parents about an issue directly from the system. It would automatically set up email addresses based on criteria selected.	High								
158	The system has the ability to enter, by student, other health factors (this is very confidential information like student has a neurological disorder or is ADHD, etc.) Should be able to select information from a pull down menu or enter free text. The level of security for this information needs to be very high.	High								
159	The system allows for Individualize Health Care Plans. It needs to be in a friendly format to develop these IHPs to enable nurses to use nursing diagnosis. Nurses should not be able to enter IHPs unless they have entered a nursing diagnosis. Should be able to review yearly—make updates as needed throughout the year—and make a report on all IHPs that are current—separate IHPs that are “discontinued” due to resolution of the health concern or no longer applicable in the school setting. A way for nurses to know who has an IHP and then easy access to view and print it	High								
160	The system provides a journal/record of all students receiving medicine or injuries (office visits) with a date/time stamp that meets the Department of Health and State requirements.	High								
161	The system provides the ability to maintain Medicaid/Medicare eligibility.	High								
162	The system provides billing capability for Medicaid/Medicare services.	High								
163	The system includes the ability to define selection and sort criteria and generate a report of students due for specific exam or screening.	High								
164	The system includes the ability to define selection and sort criteria and generate a report of students who missed specific exam or screening.	High								
165	The system includes the ability to define selection and sort criteria and generate a report of students who failed specific exam or screening.	High								
166	The system includes the ability to produce form letters for students using selective criteria such as failing exams or screenings .	High								

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Fees Requirements	Priority	Y	C	M	F	3	N	
1	The system has the ability to clearly define fees for users and end users according to categories such as required, optional, course fees, etc.	High							
2	The system has the ability to assign and un-assign fees in mass by grade, team, course or individually as appropriate.	High							
3	The system has the ability to quickly show the detail descriptions of the fees to users on the same screen where fees are displayed, e.g., use of pop up windows or notification.	High							
4	The system allows users to be granted access to add, remove, and accept payments for fees for one or many activities for a specific building.	High							
5	The system allows users to be granted access to add, remove, and accept payments for fees for one or many buildings.	High							
6	The system allows users access to add, remove, and accept payments for own building, but to read or view fees and payments in other buildings. Fee information is tied to the student and not the building.	High							
7	The system allows print and maintain student invoices and fees due correspondence of all fees owed by a student with a date range option.	High							
8	The system has the ability to maintain student invoices and correspondences for fees due for students who have withdrawn or transferred to another school within the district. The system keeps a history of paid and due fees.	High							
9	The system has the ability to generate a balancing report to show debits against credits per school.	High							
10	Fees and payments can be imported/exported to/from other systems, e.g. financial system, library system, food service, etc. The system has the ability to easily upload fee information into accounting systems.	High							
11	The system provides a report for users to print at the end of the day that details the payments they accepted and amount of payments they accepted in total and by type (cash, check, etc.).	High							
12	The system provides the ability to add standard fees by activity.	High							
13	The system provides the ability to mass print a report of fees owed by student for mailing.	High							
14	The system provides the ability to see all student fees on one page. The fees include all fees owed for current, next and previous years.	High							
15	The system provides the ability for fees to be paid online. The system is configured to facilitate easy integration with backend payment processing systems.	High							
16	Parents have the ability to see a detailed history of payments online with a drill down capability that provides the detail of what was paid for and what remains due.	High							
17	The system provides the ability to see/apply payments/fees for students moved to different district school or for fees that have been 'archived'.	High							
18	The system has the ability to accept lump sum payments and the ability to prioritize what fees are paid first.	High							
19	The system has a report of fees paid/due by grade level.	High							
20	The system has reports and screens, including receipts, that show refunds as a negative number, possibly in different colors.	High							
21	The system allows the district to define fees that can have partial payments.	High							
22	The system provides an email interface to allow emailing parents a fees due notice by fee or by student or receipt either by mass or by individual parent. This emails to the financially responsible parent. Parents are able to choose to receive via email or regular mail.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Fees Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
23	The system has the ability to track and process fee refunds efficiently. The system has the ability to notify users when refunds are due and to run transaction reports to track the status of refunds, credit card refund, etc.	High							
24	The system provides an easy method for individual schools to add grade level or activity fees for parents online.	High							
25	The system has the ability to generate collection letters for past due fees as defined by the user.	High							
26	The system provides the ability for fees to be paid on payment plan.	High							
27	The system provides the ability to automatically waive fees based on Free and Reduced status.	High							
28	The system provides the ability to pro rate fees based on admission date or admission to class.	High							
29	The system provides the ability to assign a fee or fees individually or in mass by course.	High							
30	The system provides the ability to assign all fees for next year.	High							
31	The system provides the ability to have user defined fees automatically assigned on admission.	High							
32	The system provides the ability for the system to alert bookkeepers when the Free & Reduced status (if waiver has been signed) has changed for a student in their building.	High							
33	The system provides the ability to transfer students between buildings without losing all payment history and the ability to refund if a withdrawal is done before fees are settled.	Mandatory							
34	The system provides the ability to indicate which parent/guardian has financial responsibility. The system has the ability to invoice any parties defined by the users.	High							
35	The system provides a simple to use Ad Hoc reporting option so that users can get easy, timely access to fee data. Users including teachers are able to easily query fees for any time period required.	High							
36	The system provides for logging/audit trail to be able to track who made changes/deletions to student data.	High							
37	The system provides fee and payment reports with detailed information (i.e. check number, course refund information, how paid, date paid, etc.).	High							
38	The system provides for access to peripheral systems data (i.e. 30 day lunch history).	Medium							
39	The system has the ability to generate formatted receipts. Users and parents are able to print receipts directly from the system for any payments.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Assessments Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides the ability to manage information relative to the general classification of an assessment administered to a student.								
2	The system provides the ability to record the reason for which an assessment is being conducted (e.g.: admission, assessment of student's progress, development of individualized educational program (IEP), development of individualized family service program, etc)								
3	The system provides the ability for the district to establish a table defining codes and descriptions for the reasons an assessment is being conducted.								
4	The system provides the ability to record assessment type for each assessment being administered (e.g.: achievement, advanced placement, aptitude, attitudinal, cognitive and perceptual skills, developmental observation, interest inventory, language program, etc)								
5	The system provides the ability for the district to establish a table defining codes and descriptions for assessment types.								
6	The system provides the ability to record assessment titles.								
7	The system provides the ability for the district to establish a table defining codes and descriptions for assessment titles.								
8	The system provides the ability to record the category of an assessment based on format and content.								
9	The system provides the ability for the district to establish a table defining codes and descriptions for assessment versions.								
10	The system provides the ability to record the description of the content or subject area (e.g., arts, mathematics, reading, stenography, or a foreign language) of an assessment.								
11	The system provides the ability for the district to establish a table defining codes and descriptions for assessment content.								
12	The system provides the ability to record subtest types.								
13	The system provides the ability to manage information relating to the administration of an assessment to a student.								
14	The system provides the ability to record the typical grade level or range of grade levels for which an assessment is designed.								
15	The system provides the ability to record the grade level of a student when assessed.								
16	The system provides the ability for the district to establish a table defining codes and descriptions for the grade level of a student when assessed.								
17	The system provides the ability to record the copyright date of the assessment.								
18	The system provides the ability for the district to establish a table defining codes and descriptions for copyright dates of each assessment.								
19	The system provides the ability to record the reason a student did not participate in the assessment								
20	The system provides the ability for the district to establish a table defining codes and descriptions for non-participation reasons.								
21	The system provides the ability to record the primary manner in which a test is administered to a student (e.g. group, individual).								
22	The system provides the ability for the district to establish a table defining codes and descriptions for administration methods.								
23	The system provides the ability to record the primary manner in which a test is presented to a student (e.g. computer adaptive test, oral, written).								
24	The system provides the ability for the district to establish a table defining codes and descriptions for the type of administration form.								

25	The system provides the ability to record any special variation in the administration of the test (e.g., untimed, use of sign language for hearing impaired, Braille test or large print form for visually impaired, or use of a reader or facilitator for administering the test. etc)							
26	The system provides the ability for the district to establish a table defining codes and descriptions for special accommodations.							
27	The system provides the ability to record the month, day, and year on which an assessment is administered.							
28	The system provides the ability to record the description of the place where an assessment is administered.							
29	The system provides the ability for the district to establish a table defining codes and descriptions for test locations.							
30	The system provides the ability to record the name of the individual and/or organization administering the assessment.							
31	The system provides the ability to manage information about assessment results, the manner in which they are presented, and factors which may influence their interpretation.							
32	The system provides the ability to record classifications of how results of achievement tests are related and interpreted (e.g.: norm-referenced, criterion-referenced ,achievement-level reference or benchmarked)							
33	The system provides the ability for the district to establish a table defining codes and descriptions for assessment reference types.							
34	The system provides the ability to record the group for which the scores of an assessment have been standardized for use in interpreting the results (e.g.: annual user, equated national, independent school, international, national probability sample).							
35	The system provides the ability for the district to establish a table defining codes and descriptions for norm groups.							
36	The system provides the ability to record the year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students.							
37	The system provides the ability for the district to establish a table defining codes and descriptions for norm years.							
38	The system provides the ability to record the time of year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students (e.g., fall, mid-year, or spring).							
39	The system provides the ability to report the lowest and highest individual scores obtained by a group of students who are in the same norm group.							
40	The system provides the ability to report the measure in which results are presented (e.g.: age score, grade equivalent or grade-level indicator, normal curve equivalent, normalized standard score, number score, pass-fail, percentage of items correct, etc)							
41	The system provides the ability for the district to establish a table defining codes and descriptions for reporting methods.							
42	The system provides the ability to store and report the description of a meaningful raw score or statistical expression of the performance of a student or group of students on an assessment.							
43	The system provides the ability to store and report the description of unusual testing conditions that must be known to properly interpret an individual's test score (e.g., non-standard administration, special circumstances, experience only, diagnostic only).							
44	The system has the ability to store and display state Washington Assessment of Student Learning (WASL) tests							
45	The system has the ability to store complete test history for all students							
46	The system has the ability to view individual student test scores							
47	The system has the ability to view all tests for a student							
48	The system has the ability to compare test scores for similar tests from year to year for a student							
49	The system has the ability to view class room average test scores							

50	The system has the ability to view test scores for new incoming students to a school								
51	The system provides the capability to print bar codes that contain student and school information on the answer sheets for standardized tests.								
52	The system provides the capability to pre-slug answer sheets for standardized tests with student identification number, names, gender, grade level, birthdate, special codes, and school number.								
53	The system should allow any standardized test score data to be printed on a student's transcript.								
54	The system provides the capability to do comparisons on standardized test scores for a student's entire test score history.								
55	The system provides the capability to import all test scores from any testing company and OSPI.								
56	The system provides the capability to manually enter all test scores from any testing company.								
57	The system provides a standard score distribution report that allows the user to display scores by any user-defined test administration criteria including, but not limited to: test, test administration form, test administration date, composite score								
58	The system provides a standard report, per student, of multiple test administrations, subtests and corresponding scores.								
59	The system provides a standard score distribution report that allows the user to display a selected test administration scores by user-defined student criteria including, but not limited to: grade level, class, ethnicity, and gender.								
60	The system computes the number of tests taken for a specified date range.								
61	The system allows customized export of user-defined test data.								
62	The system calculates and reports the percentage of test scores that meet user-defined test criteria.								

Assessment Reference Type

Norm Group

Norm Year

Norming Period

Score Range

Reporting Method

Score Results

Score Interpretation Information Reporting and Documentation

Test data is validated against a list of user-defined valid entries including:

- test name
- score name
- score range
- test type

Multiple types of scores are maintained including:

- integer
- pass/fail
- percentile
- freeform

Scores are validated by determining they fall within a pre-defined range identified for the score.

Students can be identified as exempt from a test as well as for one of multiple scores collected for a test.

Students for whom testing modifications were made can be identified by type of modification.

A teacher can generate a class test based on the objectives defined for the course.

A user-specified score on a standardized test (including WASL) can be defined as a requirement and used in the process to determine students who have not met requirements for graduation; for a specific diploma type; for a course of study

Test data can be exported easily by student; by grade level; by test administration

Multiple administrations of a test can be stored and reported for a student.

All tests tracked can be selected and reported on a student's transcript.

Both current and historical test data is accessible by teachers.

Capable to pre-slug/pre-print, user- defined answer sheets.

Test administration information is collected for standardized tests including:

Test Name

Test Form, Level, Or Edition

Administration Identifier (Date Or Code)

Test Date

User-Defined Test Type (I.E., End-Of-Course Or End-Of-Grade)

Score Type

Score Value

Subtest Name

Exemption Reason

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to create look up and report without requiring any programming or code modification by the user.	High							
2	The system provides acceptable table values when queried in an on-screen pop-up manner for easy entry and referral.	High							
3	The system provides access to context-sensitive help throughout the entire application.	Medium							
4	The system provides for automatic joining of tables without any programming or code modifications by the user.	High							
5	The system provides the ability to select any student table/view in the database.	High							
6	The system provides the ability to define reports and subsequently initiate their production.	High							
7	The system provides the ability to save user-defined reports.	High							
8	The system provides the ability to modify or copy saved user-defined reports.	High							
9	The system provides the ability to view created reports on-screen, print, save to external media in ASCII/Excel/Access formats or transfer to another software package such as dBase, Lotus, etc.	High							
10	The system provides the ability to execute multiple level sorting of report rows by data type.	Medium							
11	The system provides the ability to utilize the conditional factors "equal to (=)", "greater than (>)", or "less than (<)" between values and net values to create reports.	Medium							
12	The system provides the ability to save to external media the programming language used to create the user-defined report.	Low							
13	The system includes an end-user tool that is easy to use and powerful in its capabilities. The tool must be totally integrated with the application and the commercial database proposed.	High							
14	The system includes a report writer that is graphical not text or script based; SQL alone is not an acceptable method.	High							
15	The system provides for context-sensitive help features throughout as well as an online manual.	High							
16	The system provides for automatic joining of tables with related data without any programming.	High							
17	The system allows users to create look up queries and reports without knowing any programming language.	High							
18	The system allows report definitions to be saved and used again, modified or copied and changed.	Medium							
19	The system provides for sorting of rows in multiple orders.	High							
20	The system provides for the easy design of mailing labels. The students included should be able to be based on criteria from any field or flag and sorted by any field.	High							
21	The system includes reports that are easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report) and exported to a file such as word documents, spreadsheets, email, faxes, or transferred to an ASCII format, with fixed-width fields, for loading into another package or tool. Reports can also be produced in a PDF format so they may be viewed via Adobe Acrobat.	High							
22	All reports in the system have extensive flexibility in the order the standard report information appears.	High							
23	All reports should have similar front-end questions prior to producing the report.	High							
24	The system queries and reports must be able to be produced based on conditions such as =, >, <,>,<=, in between values, and net values.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
25	The system allows the search and sort on any and all data fields (ex. name, student ID, grade, bilingual students, etc.)	High							
26	The system allows for searching using a combination of criteria (i.e. perform search based on student name AND birth date).	High							
27	The system allows searching using wild card or partial input (i.e. input XXX% to search for XXX XXXXXX).	High							
28	The system provides for the selection and grouping of report data by any field with sub-totals and sort orders.	High							
29	The system allows for user-defined on-screen prompts and selection criteria when generating reports.	Medium							
30	The system allows for defining reports that can be run at predefined intervals, or calendar dates in the future.	High							
31	The system allows users to save standard report definitions and reprocess those requests for future reporting.	High							
32	The system allows a user to be able to utilize a standard report definition that has been defined by another user as long as security access is maintained.	Medium							
33	The system prints barcodes and pre-printed forms (e.g. address labels, bubble sheets, student IDs, schedule cards, transcripts etc.).	High							
34	The system includes a data dictionary (i.e. list of fields with definition and data relationships if applicable) that is accessible by the end user in a format that is easily understood by a non-technical person.	High							
35	The system supports printing to a network connected printer, or a locally connected printer.	Medium							
36	The system allows for sending reports and documents via email as an integrated component of the system.	High							
37	The system support report writing including a variety of standard arithmetic and statistical functions such as sum, average, minimum, midpoint, maximum, percentage, etc.	High							
38	The system allows for district-wide or school-specific reports to be generated.	High							
39	The system allows the user to be able to print screens, allow the use of printers attached to PC workstations, and allow multiple printer access for all users.	High							
40	The system supports distinct levels of security for data mining and reporting can be defined for different levels and types of users throughout the district.	High							
41	The system is designed to allow reporting and querying functions as multi-user and these tools do not cause record contention issues for other users.	High							
42	The system includes security where only users with the proper security are allowed access to certain protected confidential fields such as the student and teacher social security number, the student state id and prior state id, student economic status, etc.	High							
43	The system supports the definition of routing or distribution lists as a part of the report definition. And then documents are sent electronically according to defined routing lists.	Medium							
44	The report writer has no user, developer, or license limitations.	High							
45	The system allows only authorized users to be able to define reports and initiate their production.	High							
47	The system includes the ability to have summary and detail data on a report, with both drill-down and roll-up capabilities (i.e. students, Teacher, school, district, etc.). Also build reporting relationships specific to or across entities.	High							
48	The system provides integrated wizards for creating graphs and charts.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
49	The application allows the user to customize standard reports with different selections, includes/excludes and sort sequences.	High							
50	The system allows the user with proper security to be able to lock defined report parameters so that it may not be changed by others.	High							
51	The system provides the user with a list of only the reports they are authorized to run.	High							
52	The system allows for the printing and designing forms in multi-language (Spanish, Vietnamese, etc.).	High							
53	The system has the ability to add notes electronically to reports.	High							
54	The system allows for free-form text searching.	Medium							
55	The system allows for search definitions be stored.	Medium							
56	The system allows for controlling the number of copies made of a report.	Low							
57	The system allows the user to designate the job start time for reports.	Medium							
58	The system allows the user to specify the priority of reporting.	Medium							
60	The system allows reports to be run in the background.	Medium							
61	The system provides a reporting tool that produces line graphs, bar charts, pie charts, scatter charts, etc.	High							
62	The system provides a reporting tool that can toggle between chart and supporting data.	High							
63	The system allows end-user defined formulas to be included in reports.	High							
64	The system allows the formatting of dates in reports by the end-user.	High							
65	The system allows the end-user to define a report's sort order.	High							
66	The system allows the end-user to change a report's sort order at report run time.	High							
67	The system allows the end-user defined sort definitions be stored and reused.	High							
68	The system allows the end-user to share stored report definitions only with other end-users who have the proper security.	Medium							
70	The system provides mail merge capabilities.	High							
71	The system includes native Online Analytical Processing (OLAP) capabilities	High							
72	The system includes a web-based data mining application for advanced analysis of data to the individual record level.	High							
73	The system allows data mining techniques such as a simple drag and drop interface to allow non-technical users to disaggregate, manipulate and analyze data.	High							
74	The system provides a report at the school level of Daily Attendance.	High							
75	The system provides a report at the school level of Bus rolls.	High							
76	The system provides a report at the school level of Discipline Reports.	High							
77	The system provides a report at the school level of Condensed Schedules	High							
78	The system provides a report at the school level of Student Data Verifications	High							
79	The system provides a report at the school level of Teacher Utilization	High							
80	The system provides a report at the school level of Room Utilization	High							
81	The system provides a report at the school level of Attendance Summary - Excused/Unexcused Absences	High							
82	The system provides a report at the school level of Enrollment Verification Report	High							
83	The system provides a report at the school level of Student Schedules	High							
84	The system provides a report at the school level of Student Labels	High							
85	The system provides a report at the school level of Class Lists	High							
86	The system provides a report at the school level of Master Course Lists	High							
87	The system provides a report at the school level of Graduation Requirements.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
88	The system provides a report at the school level of Honor Roll/Principal Honor Roll	High							
89	The system provides a report at the school level of Class Ranking	High							
90	The system provides a report at the school level of Proficiency List	High							
91	The system provides a report at the school level of Revoke License	Low							
92	The system provides a report at the school level of Credits Scheduled Assessment	High							
93	The system provides a report at the school level of Student Demographic Sheets	High							
94	The system provides a report at the school level of Perfect Attendance List	High							
95	The system provides a report at the school level of Teacher Demographic Sheets	High							
96	The system provides a report at the school level of Vocational class lists	Medium							
97	The system provides a report at the school level of Vocational student lists	Medium							
98	The system provides a report at the school level of Contact Lists	High							
99	The system provides a report at the school level of Demographic, schedule, grades printout	High							
100	The system provides an Administrator's dashboard with summary NCLB statistics.	High							
101	The system allows the user the ability to select the metrics they want to monitor on their dashboard.	High							
102	The systems dashboard metrics can be selected from attendance, discipline, enrollment, calendar information, test scores, and at risk students.	High							
103	The system allows the user to select thresholds that will change the color of the dashboard warning graphic colored coded (i.e., to green, yellow, or red) depending on the value.	High							
104	The system allows the creation of an At-risk student dashboard that can indicate the number of students failing a course, the number of seniors without enough credits to graduate, the number of students failing courses needed to graduate, and the number of students who didn't graduate last year.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides for real time class rosters including transferred student in the teacher gradebook.	High							
2	The system provides the ability for Student demographic data to include contact information to be accessed real time. Changes made in the Main SIS should be seen immediately in the teacher attendance/gradebook	High							
3	The system provides the ability to sort roster information by a variety of fields such as name, gender, ethnicity, secret name, or student number or random.	Medium							
4	The system provides the ability for creation of various customized seating charts for each class allowing for flexibility on the room arrangement	High							
5	The system provides the ability for teachers to take daily/period attendance using the grade book and be integrated into the SIS real-time.	High							
6	The system provides the ability to take daily/period attendance using the seating chart	High							
7	The system allows for generation of elementary standards-based report cards	High							
8	The system shall bin integrated real-time with main SIS for Report Card and Progress Report grades and comments	High							
9	The system provides the ability to create and define grading categories.	High							
10	The system provides the ability to create and define assignments (i.e. name, weight, category, due date, notes).	High							
11	The system provides the ability to copy multiple assignments to multiple class files.	High							
12	The system provides the ability to create special scores for assignments with definition of value (i.e. NHI = Not Handed In).	High							
13	The system provides the ability to create, define, and enter extra credit scores.	High							
14	The system provides for the entry of letter or numeric scores by mouse and keyboard(tab/shift/cursor keys) and 10 key entry	High							
15	The system provides for Auto-fill scores (i.e. assign same grade to an entire class of students)	High							
16	The system provides the ability to copy student assignments with scores to another class file (if student transfers classes).	High							
17	The system provides the ability for identification of missing or incomplete assignments.	High							
18	The system provides for the entry of alternative grade (manual grade override) for reporting period.	High							
19	The system provides for the selection of multiple standard comments selected from a drop-down list per student, per class, per grading period for integration into standard progress or report card.	High							
20	The system provides for the entry of narrative comments per student, per class, per grading period for integration into standard progress or report card.	High							
21	The system provides for the assignment of same standard or narrative comments to multiple students for integration into standard progress or report card.	Medium							
22	The system provides for automatic transfer for the reporting period to include grade, conduct, parent conference information, and all information required for reporting purposes from the gradebook directly into the main SIS system.	High							
23	The system provides for designation of different reporting periods within same class file.	High							
24	The system provides for score display as letter grade, code, percentage and/or raw numeric score.	High							
25	The system provides for individual teacher formatting preferences (i.e. font, column width, etc.)	Low							

26	The system provides reporting period and overall grade summary columns.	High							
27	The system provides for entry of individual student general notes for viewing by the teacher and shared with any teacher the student has and administrators(not comments for reporting to parents).	High							
28	The system provides for entry of individual student assignment notes for viewing by the teacher only (not comments for reporting to parents).	Medium							
29	The system provides for entry of a note for entire class for viewing by the teacher only (not comments for reporting to parents).	Low							
30	The system provides for the generation of standard teacher gradebook reports such as an individual student grade report with assignment details.	High							
31	The system provides for the generation of standard teacher gradebook reports such as a class grade report with assignment details.	High							
32	The system provides for the generation of standard teacher gradebook reports such as an assignment list report.	High							
33	The system provides for the generation of standard teacher gradebook reports such as a missing assignments report.	High							
34	The system provides for the generation of standard teacher gradebook reports such as a list of student birthdays.	High							
35	The system provides for the generation of standard teacher gradebook reports such as an emergency contact list with all telephone numbers and contact information.	High							
36	The system provides for the generation of standard teacher gradebook reports such as a class list with a blank grid with free text column headers.	High							
37	The system provides for the generation of standard teacher gradebook reports such as a user defined failure list by assignment and by class.	High							
38	The system provides for the generation of standard teacher gradebook reports such as a bulletin board postings.	Medium							
39	The system provides the ability for teacher grade analysis for individual assignments such as class average with the ability to determine when parents see the information.	High							
40	The system provides for automatic transfer of the assignment details and scores from the gradebook directly into the parent portal. Parent portal and gradebook must be integrated.	High							
41	The system provides for secure access for teachers and administrators	High							
42	The system provides access to all teachers assigned to a class in the master schedule.	High							
43	The system provides for emailing missing assignments, progress reports and D's and F's sent to parents by individual student or by class. When sending individual emails, it should automatically launch Outlook	High							
44	The system provides the ability to view on one screen what has been posted for the parent to view.	High							
45	The system provides the ability to create special teams such as coaching	High							
46	The system provides the ability to print missing assignments by individual student, for all classes at once and for every class such as math, science, social studies, etc.	High							
47	The system provides color coding for exemption, late, missing, below teacher defined threshold, color codes by assignment category.	High							
48	The system provides the ability to graph assignments by student or class.	High							
49	The system provides the ability to have teacher defined categories for assignments to allow sorting, printing etc.	High							
50	The system provides for sorting of assignments by date, category, etc.	High							
51	The view for Parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view)	High							
52	The system provides the ability for teachers to view, print etc., rosters using students "preferred" first name	High							
53	The system provides a web site that teachers can login to keep track of classroom discipline.	High							

54	The system allows the teacher to be able to enter classroom discipline events for managing daily classroom discipline only which the teacher has the option to share.	Low							
57	The system has the ability to exempt students from assignments.	High							
58	The system provides a messaging system to allow teachers to email parents by class or student with a click of the mouse (not have to enter email address)	High							
59	The system is integrated with the gradebook/attendance with other messaging systems such as School Messenger.	High							
60	The system is integrated with teacher websites in programs such as School Center?	High							
61	A "chat" or "blog" or "daily alert" feature, in which teachers can collaborate with other teachers a student has, about the student. For example, if a student has had a death in the family the previous evening, we need to be able to make a quick pop up for other teachers of the student in their roster screen	High							
62	The system displays alerts for all students as the teacher views a class list without having to scroll or "touch" each student. "Smart" alerts are defined as having some indicator by icon or color that indicate that the alert is either medical, SPED, 540 Plan, parent alert, etc. The alerts must be able to indicate multiple alerts for an individual student.	High							
63	The system has an attendance screen that displays all students from an average size class without scrolling.	High							
64	The system provides an attendance report for teachers for one student or a class of students for any date range within the school year.	High							
65	The system allows for an easy setup of teacher preferences. Preferences are defined as the linking of classes together so that assignments only have to be created once and can then be copied to other classes in the preference. The preference also sets the weights for the classes, the assignments types to be used and the learning targets to be used in preparing assignments.	High							
66	The system allows for multiple teacher preferences to be setup rather than entire gradebook.	High							
67	The system provides for teacher preferences to include total points (the total number of points earned divided by total possible) vs. weighted percentages (each assignment is converted to a percentage grade and is the percentage is used in calculating the average)	High							
68	The system provides for teacher preferences to include weighted assignments types	High							
69	The system provides for teacher preferences to include weighted units of study (which are the objectives for the particular area of study)	High							
70	The system provides for teacher preferences to include report cycle weights	High							
71	The system allows for the optional transferring of assignments, attendance, and grades when a student transfers to another class with the same teacher.	High							
72	The system allows for a choice of either rounding or truncating when posting a report card grade.	High							
73	The system allows the teacher to use report cycle weights (each reporting period has a weight) rather than cumulative (where the grades are continuous through the length of the class) , the gradebook as well as the parent portal should display the average that represents the current report cycle as well as the average that is being earned for the entire semester.	High							
74	The system automatically exempts any assignment prior to the time a student enters the class.	High							
75	The system has a process that posts the student average with the alpha conversion from the gradebook to the report card at the end of each report cycle. This grade will be stored with the course and the final grade will be moved to credit details (the areas of the system that stores courses that have final grades) at the end of the year. This process should be completed with a minimum amount of "clicks".	High							
76	The gradebook provides for the capability to move a student to the bottom of the column in the gradebook when a student drops the class or a toggle to hide withdrawn or dropped students.	High							

77	The system provides teacher reports including, but not limited to Class lists, class list with a grid for entering information, birthday lists, a failures report based on teacher defined criteria, a missing assignment report, an emergency list for the class of all parent/guardian contact information, a medical report of allergies, individual student progress reports listing all assignments and grades for a specific period of time, and student schedules and mailing labels.	High							
78	The system allows the teacher that teaches at multiple buildings, to be able to switch buildings without having to log out of the system.	High							
	The system allows teachers to view for their students								
79	The system allows teachers to view for their students Demographic - address, phone number(s), language spoken at home.	High							
80	The system allows teachers to view for their students emergency contact information.	High							
81	The system allows teachers to view for their students basic medical - life threatening and allergies information.	High							
82	The system allows teachers to view for their students class schedules.	High							
83	The system allows teachers to view for their students standardized test results.	High							
84	The system allows teachers to view for their students Transcript.								
85	The system allows teachers to view for their students attendance from previous years.	High							
86	The system has the option at the end of the semester to select specific students for posting of final grades without having to post the entire class. This comes into play particularly at the end of the year when the seniors graduate early and grades need to be posted to determine graduation but there are juniors in the class who have additional time to complete assignments and take finals.	High							
87	The system provides for teachers gradebook to be automatically archived at the end of the year for all classes taught throughout the year.	High							
88	The system allows for schools to have the option to allow teachers to enter attendance reasons.	High							
90	The system allows a spreadsheet format for entering grades using tab and shift tab to go across and the enter key to go down as well as the arrow/cursor keys.	High							
91	The system has the ability to import raw assessment data.	High							
92	The system has the ability to attach three or more of any media type to an assignment.	High							

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Parent-Portal Requirements		Y	C	M	F	3	N	
1	The system provides parent and students access to assignments and assignment grades by class or date range.	High							
2	The system shall display a list of the student's current classes with their current and cumulative average.	High							
3	The system supports teacher options around grade calculation (empty counts as zero or exempt, weights, etc.) shall be clearly displayed in the parent/student portal in an intuitive manner. All necessary information should be provided to calculate and arrive at the same final grade as displayed.	High							
4	The system provides the ability to link to teacher's website (School Center) to view assignments, instructions, etc. (i.e. a free form URL text field for the teachers)	High							
5	The system allows the teachers control over when the parents see specific assignments and their associated grades	High							
6	The system should have teacher selected indicators on assignments such as "assignment has not been graded", "assignment has been handed in"	High							
7	The system should have a noise notification (set by user preference option) when parent enters system alerting for missing assignments, low grades, etc.	High							
8	The system shall be fully ADA compliant/accessible (i.e. screen reader compatible)	High							
9	The system provides parent and students access to Pay Required/Optional Fees Online. Once a required fee has been paid, it should not be available to pay again.	High							
10	The system shall have the ability to view fee payment history including detail of which fees were paid	High							
11	The system provides for viewing of lunch balance, lunch history and payment on lunch account through integration with a third party POS.	High							
12	The system shall be fully PCI compliant in regards to fee/lunch payments. System should not handle the credit card number directly.	High							
13	The system should provide parents with a payment plan option (as part of a fee payment system)	Medium							
14	The system provides parent and students access to Attendance including date and reason by date range or by class.	High							
15	Allow multiple logins to be associated with the same student to provide for split-household situations	High							
16	Provide the district the option to allow parents to report absences and associated reasons through system	High							
17	Provide the district with the option to post announcements to parent and students	Low							
18	Allow for parents to have a single login to access all of their assigned students	High							
19	The system should allow the option to provide sign-on verification for other systems (i.e. a web service or database procedure which will accept a username and password and return success/failure).	High							
20	The system must have the ability for parents and students to reset a forgotten password by e-mail (using a GUID-based URL or something similar)	High							
21	The system must store all passwords in a secure manner (i.e. one-way, salted encryption)	High							
22	The system must allow parents/students to update sms/email/phone contact information and specify contact preferences for different categories of messages (i.e. attendance notifications by SMS, grade alerts by e-mail, etc)	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
23	The system provides parent and students the ability to request courses for the following year during a time frame defined by/per school	High							
24	The system provides parent and students access to the student's medical Information. This needs to be configurable to allow the district to determine which medical information should be accessible	High							
25	The system provides parent and students access and ability to print a parent friendly version of the student's current schedule	High							
26	The system provides parent and students access and ability to print an unofficial copy of the student's transcript	High							
27	The system provides parent and students access and ability to print the student's report card	High							
28	The system allows the update of Demographic and Emergency Contact Information via the parent portal that includes an approval process by the affected school registrar.	High							
29	The system should provide parents and students the student's teachers' and counselor email addresses with the option of an in-site e-mail form which generates an e-mail to that recipient.	High							
30	The view for parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view)	High							
31	The system should allow for the district to display standardized test scores and percentiles. The district should have the flexibility to determine which tests are viewed by parents	High							
32	The system should provide an option to allow students/parents to view and update the student's 4 year course plan	High							
33	The system has the option to have course requests populated from a student's 4 year course plan.	High							
34	The system should provide for the ability for the district to add additional screens/options/data fields	High							
35	The system has the ability for parents to self-select threshold/event e-mail alerts (i.e. when Sarah's grade in math drops below a C, when Johnny is tardy to a class, etc.)	High							
36	The system provides parent and students a view of met diploma requirements. Views should include where the student is currently, will be at the completion of current courses, and based on course requests for next year.	High							
37	The system allows the district the ability to integrate with an external course application/LMS (i.e. Blackboard)	High							
38	The system allows for parents to sign themselves up for access to the parent portal. This would be approved by the school of their oldest child	High							
39	The system allows for the parent to request additional students added to their account	High							
40	The system allows the parent to request a transfer of their student to another BV school	High							
41	The system provides all documents for a parent to register a new student, with workflow to the appropriate people for approval	High							
42	The system has the flexibility to enable/disable portal features (i.e. course registration, assignments, etc) by school	High							
43	The system should track the number of times parents have accessed the parent portal information and log this information to be viewed by administrators, counselor and teachers.	High							
44	The system provides the display of the non school days for the year.	High							
45	The system provides support for student portfolios for both electronic and scanned artifacts.	Medium							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
46	The system allows for the electronic tracking of notices, flyers, etc. that used to be sent home with the student (picture day reminders, music programs, etc)	Medium							
47	The system includes the ability to add custom menu links to the parent/student portal that link to district applications.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	State Reporting Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the necessary data structures and data elements necessary to produce the Washington state reports.	High							
2	The system provides auditing reports to support the aggregate numbers associated with each state report.	High							
3	The system provides exception reports detailing each student who is not included in each state report.	High							
4	The system allows overrides of student data to accommodate discrepancies in detail data.	High							
5	The system provides for electronic transfer of state report information to the state department of education per the reporting requirements.	High							
6	The system provides a state grade level equivalent value for each district defined grade level.	High							
7	The system provides the ability to define a state equivalent to each code/description value available in the system.	High							
8	The system includes a field for tracking whether or not the student is Hispanic, and if Hispanic which specific Hispanic culture based upon a list defined by the district.	High							
9	The system includes a field for tracking the students Race code. This district defined list of race codes is cross-walked to a Federal code of Race.	High							
10	The system includes a field that is automatically populated whenever the Federal Race and Ethnicity fields are modified. This field is a composite of these two fields, typically referred to as a Federal Race and Ethnicity code.	High							
11	The system provides the P-223, Monthly Report of School District Enrollment Eligible for Basic Support.	High							
12	The system provides the P-223H, Monthly Report of School District Special Education Enrollment.	High							
13	The system provides the P-240, Monthly Attendance Report of Ancillary Services to Part-Time Students Eligible for Basic Support.	High							
14	The system provides the P-210, Public High School Enrollment Status.	High							
15	The system provides the DOH348-002a, Required School Immunization Status Report.	High							
16	The system provides the M-873, Scoliosis/Kyphosis Screening Report.	High							
17	The system provides the M-765A, Traffic Safety Education Certificate report.	High							
18	The system provides the 1503 Washington State Standardized High School Transcript report.	High							
19	The system provides the 1094E Learning Assistance Program End of Year Report.	High							
20	The system provides the 1094ES Learning Assistance Program End of Year Summer School Report.	High							
21	The system provides the OMB 1810-0503 Annual Performance Report Title IX Indian Education Formula report.	High							
22	The system provides the OMB 1870-0500 Civil Rights Compliance Report.	High							
23	The system provides the P223S Nonstandard School Year AAFTE Enrollment Eligible for Basic Support Report.	High							
24	The system provides the Office of Civil Rights Data report.	High							
25	The system provides an extract file compatible with the CEDARS OSPI system, compliant with the 2013-2014 school year.	High							
26	The system provides a report of Alternative Learning Student populations	High							

Response Instructions to Functional Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	~~Requirement will be met through changes to the existing reports or programs. This would include custom code developed~~ to perform specific functions or validations outside the standard code. Include the creation of a new report, query of workflow that does not exist within the current solution. Note: In the Comments column next to this response, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Modification	M	~~Requirement will be met through changes to the source code which would require analysis and re-application during future~~ updates, upgrades, or when applying software patches.
Supplied by Third Party	3	~~Requirement will be met by third party software package and is included in the proposal.~~ Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.
Note:		
1. An omitted response will be assumed to be the same as a response code of "N". 2. Any deviation from the response codes will be re-coded at the discretion of NSD. 3. In this Worksheet there are 4 Tabs. Each must be completed with codes above. 1 Data Integration & Migration 2 Technical Infrastructure 3 Third Party Integration 4 Training & Support		

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Data Integration & Migration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires. The tests should include but is not limited to standardized test scores such as Washington Assessment of Student Learning (WASL), Measures of Academic Progress (MAP), High School Proficiency Exam (HSPE), PSAT, SAT, etc.	High							
2	For each test given, the system tracks the test, form, level, multiple sub-tests and the number of items in the test that relate to each sub-test.	Low							
3	The system allows for standardized tests to be imported from data files supplied by outside sources into the application.	High							
4	The system should be able to import raw test data from other sources.	High							
5	The student's main record must track all the tests taken over time, whether they are standard tests, school tests or district tests.	High							
6	For each test tracked, the test name, date it was administered, and the score must be recorded.	High							
7	The test scores recorded must be able to be stored in the formats provided (e.g. .csv, .dat)	Low							
8	The system provides an item analysis report or display.	High							
9	The system provides a student response analysis report.	High							
10	The system provides a school summary of responses for any given test.	High							
11	The system provides statistical reports that include mean, median, standard variance, standard error, and minimum/maximum scores.	High							
12	The system maintains an ongoing test and assessment history for each student in the district in the data warehouse.	High							
13	The system supports national, state and local district-defined test definitions.	High							
14	System should be able to support FAFSA forms tracking.	High							
15	The system allows external records, e.g., health records should be able to be attached to a students record within the system.	High							
16	The system allows test scores to be hand-keyed or may be mass imported from data files and the system provides for easy resolution to identify import errors and correct them.	High							
17	The system supports an unlimited number of tests and subtests across all school years for each	High							
18	The sytem supports test scores that are either alpha or numeric.	High							
19	The system allows the district to define which tests are printed on the transcript (e.g., first SAT, last SAT, best SAT, etc.).	High							
20	The system provides for ability to create pre-coding file for state assessments.	Medium							
21	The system provides an efficient method for reporting on testing data for specific groups of students including student's age, grade, building at the time the test was taken and including data from other modules such as Demographics, Special Programs, etc.	High							
22	The Test History Report can be run in a variety of ways, allowing users to select which information is included in the report. The user should be able to run the report by test or by student and should be able to include/exclude subtest score information, tracking information, demographic information, etc.	High							
23	The system allows for standards and indicators to be imported from the state website or from the district's curriculum mapping system	High							
24	The system allows all common score type fields including but not limited to: raw score, percentage, % scaled, standard deviation, normed score, number of items correct and local district-defined score types.	High							
25	The system provides ability to copy test definitions.	High							

26	Allow for user-friendly modifications, for users with the proper security, to test definitions as assessment requirements change or a new test is developed.	High							
27	The system provides online access by parents and teachers to test scores.	High							
28	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires.	High							
29	The system provides the ability to track multiple attempts at the same tests.	High							
30	Text describing a test and subtest or its administration may be entered.	Medium							
31	The authorized user may export data to statistical packages, such as SPSS, through flat ASCII data files, via the Report Writer.	High							
32	The system provides analysis improvement/progression for students and programs. The system should facilitate analysis for a single student, grade, school, cluster, program, or English proficiency category. The system should facilitate analysis by comparing different tests.	High							
33	The authorized user may view and maintain the test results by student and by test, including the associated tracking data.	High							
34	The system enables online access to syllabus and assignments.	Low							
35	When a test is added for a student, the system stores the student's age, grade, and building at the time the test was taken.	High							
36	The system supports setting exclusion flags on students who may be excluded from having to pass a course or test.	Low							
37	The system allows alternate test flags.	High							
38	The system allows test exemptions.	Low							
39	The system allows parent waivers.	Low							
40	The system allows ability to show test scores for similar tests from year to year for a student.	High							
41	The system allows ability to perform cohort group multi-year test history reporting.	High							
42	The system provides the ability to create test results by class to send to teachers.	High							
43	The system provides the ability to view classroom average test scores.	Medium							
44	The system supports tracking test data down to the detailed test question level (for each test question, Track associated objectives, Student Expectations, Answer Key, Student answer, student score, etc.)	Medium							
45	The system supports summarized test data down to the Student Expectation level (student progress towards competency of each SE and/or Objective, Student mastery of each test, etc.)	Medium							
46	The system allows data mining and advanced OLAP analysis of test score information incorporating user-defined criteria and database elements.	Medium							
47	All user defined report generation capabilities should be intuitive and easy to use.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement						
#	Technical Infrastructure Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system utilizes industry standard RDBMS platform which supports ANSI-SQL and ODBC connectivity Preferred (in order of preference): MySQL 5.6, PostgreSQL 9, MariaDB 10, SQL Server 2008 R2, Oracle 11g, or later versions of any	High							
2	The district will have root access to all database content.	High							
3	The system allows the customer be able to create custom tables, views, triggers, and stored procedures.								
4	The system is designed to allow the customer be able to create custom tables, views, triggers, and stored procedures so that these custom modifications are not impacted or otherwise affected by vendor provided patches, updates, and upgrades.	High							
5	The system has ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High							
6	Customer will be able to develop their own custom screens and reports. Vendor provided patches, updates, and upgrades will not delete, overwrite, or otherwise damage customer developed content, reports, and screens.								
7	The development environment or tools for creating custom reports and screens must be non-proprietary.	High							
8	The system software application and database servers run on industry standard 64-bit Operating systems running in VMware vSphere 5 or later. Preferred: Debian Linux, Ubuntu Linux, Redhat Linux, Windows Server 2012 or later releases	High							
9	The system software supports the most current release of the development environment recommended by the vendor.	High							
10	All application functionality for end users is available on current stable releases of Mac OS X and Windows and on at least three of the following web browsers: InternetExplorer, Safari, Firefox, Chrome	High							
11	The system does not use Java or Flash applets as any part of the end user interface.	High							
12	Areas of the system intended to be accessed by teachers, students, and parents will be accessible through a web browser or a custom client on iOS 6, Android 4.2, or later releases of each. The system supports these browser's latest release within 6 months of final release date								
13	List any browser plug-ins required or recommended for use by the system including what area of the site uses them and the oldest versions of the modules that are supported by the system.	High							
14	The vendor supplies customer with data diagrams detailing all tables, columns, relationships, indexes, triggers, and stored procedures.	High							
15	Describe how Customer will be able to run test, development, and training instances of the system on their network. Will those instances require additional licenses?	High							
16	The system allows for transactional backups during the day to assist in near time of failure recoveries.	High							
17	If the system sends or receives email messages directly, it will use SMTP and/or IMAP. The system will not run its own mail service. If it uses SMTP, it will support SMTP authentication and TLS.	High							
18	System does not require continual vendor access for operation.	High							
19	System doesnot require that any ports other than ports for secure web access be exposed outside of the Customer network	High							
20	All vendor access to the Customer implementation of the system will be through secure, encrypted communication protocols such as ssh and sftp	High							

21	All server access will be controlled by the Customer. Vendor will not retain root access to the system or have any "backdoor" access into the system unless specifically allowed by the Customer.	High							
22	The vendor has a recommended method for backup up the system (application files and databases) and the method for restoring the system from a backup. Pleae provide these details.	High							
23	Describe the recommended hardware configuration for your solution given a district of 30,000 students and 2,500 staff	High							
24	The vendor provides a simple graphic of the hardware architecture (including at a minimum database servers, application servers, and load balancers if applicable).	High							
25	Will Customer be able to create custom tables, views, triggers, and stored procedures? How will these be maintained across vendor provided patches, updates, and upgrades?	High							
26	System has the ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Third Party Integration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	What existing interfaces and protocols are available for data integration with other systems?	High							
2	What security is provided in the system to restrict the import and export capabilities to only authorized users?	High							
3	The system allows user-specified data for all students, enrolled and withdrawn, from “current” and “prior” school years can be automatically exported/downloaded in a variety of common formats, such as flat file with fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High							
4	The system allows user-specified data for all students, enrolled and withdrawn, for the “current” school year as well as teacher information can be automatically imported or uploaded at regularly scheduled intervals (e.g., hourly, daily, etc.) without any human interaction from the third party software.	High							
5	The system allows user-specified data for all students, enrolled and withdrawn, for “current” school year can be automatically imported/uploaded from files in a variety of common formats, such as flat file with fixed-width fields, .CSV, MS Excel, pipe-delimited.	High							
6	The system allows during data import, for the system to validate data integrity and produce update/rejection reports and files.	High							
7	The system includes real-time data import and export utilities with support for a wide range of industry-standard formats, including fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High							
8	The system imports test results for tests including, but not limited to State Assessments, SAT, and ACT.	High							
9	The system is able to create extract records as required by the state department of education.	High							
10		High							
11		High							
12		High							
13		High							
14									
15									
16	What methods are available for uploading student/staff/parent photos in bulk? Can it be done through the application web interface? Can uploads be done by school staff?	High							
17	What ability will the Customer have to change the look and feel of the web interface by modifying graphics, html, or css?	High							
18		High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The vendor provides accurate and complete training materials for the proposed version of the software. They will have knowledgeable trainers readily available for on-site sessions with end-users, as well as availability of web-delivered/distance learning training. If an assigned trainer is replaced, the replacement should be of equal or better experience.	High							
2	The vendor provides an extensive and high-quality training program. The student information system will affect virtually all departments and functions in the school district; therefore all staff members will require some level of training. The vendor must work closely with the district to develop a training plan designed to bring comprehensive SIS instruction to the district staff, all end users, technical support staff, system administrators, and district training team. The training needs to be specific to the operational rules of the district and to the tasks required of the end users. The vendor must have experience in training people with varying level of computer proficiency.	High							
3	The vendor provides training materials for full implementation. The district will be given the right to reproduce all training materials as needed. Materials shall include practice exercises, "cookbook-type" fast reference guides, and training manuals.	High							
4	The training materials provided by the vendor are distributed in a widely used editable format, such as Microsoft Word, Power Point, or PDF.								
5	The vendor will train the district's technical staff. Vendor must specify what core knowledge/skills will be required for the technical staff. The vendor shall perform on-site training and consulting services for the district's technical/support staff during the implementation and transition to the new SIS software system. The vendor must include in their proposal a plan for how this knowledge transfer will occur, and identify the roles that the district will assume once the knowledge transfer is complete. If any of these roles requires advance knowledge or certification before the knowledge transfer can occur, this must be noted in the proposal.	High							
6	All training supplied by the vendor will be conducted at the district's facilities and via a web-based training. The vendor must provide training options that are available for the proposed system including recommendations for "best practices" approach. The vendor shall also specify what training a third-party supplier may provide. Vendor must indicate what training is viable for a train the trainer approach.	High							
7	The vendor supplies and promotes continuous training of the application software on a periodic basis.	High							
8	The vendor provides training in the use of the report writing tool for the group of users authorized to use the tool.	High							
9	The vendor provides up-to-date, accurate, extensive, online, and searchable documentation identifying step-by-step procedures for completing tasks and activities. In addition, District will require documentation for any customizations or configurations that are done. District would like the ability to edit documentation in order to customize for their business rules.	High							
10	The vendor provides a sample of user documentation that would be delivered with the application software.	High							
11	The vendor provides manuals and documentation in PDF format.	High							
12	The vendor supplies manuals and documentation in a format that can be edited by the District, allowing the District to customize the documentation for their users.								
13	The vendor allows the district authorization to print unlimited additional copies of user documentation.	High							

14	The system will be accompanied by written and online user manuals and other system support documentation in electronic format. The application provides for extensive documentation identifying end user step by step procedures for completing tasks and activities as well as technical documentation	High							
15	The vendor provide will provide on-site installation and implementation of the software. Please provide information on procedures for installation and implementation of software.	High							
16	The on-site support provided by the vendor will be for an agreed upon period of time after product implementation is completed.	High							
17	The vendor offers service and support options including:	High							
18	The vendor offers service and support options including 7 X 24 phone support for critical, production-halt situations.	High							
19	The vendor offers service and support options including on-site or dial-in response within two business hours for production-halt situations.	High							
20	The vendor offers service and support options including 7 X 12 phone support for non-production-halt situations.	High							
21	The vendor offers service and support options including on-site customization and trouble-shooting during implementation.	High							
22	The system is integrated with Internet services that allow users to access Help desk services via the Internet and phone calls to ask questions related to the software, inquire about the status of current calls, and to receive software and documentation updates automatically after software implementation is complete.	High							
23	The vendor has an adequate number of support phone lines and the necessary staff to handle calls.	High							
24	The system allows for remote dial-up as well as transmitting or receiving software or data to and from the district's system.	High							
25	The vendor provides an outline of their formal problem resolution management procedure, escalation procedure, service level agreement, etc.	High							
26	The vendor has a method for prioritizing support cases for resolution, i.e. functional problem, user down, system down, etc.	High							
27	The vendor provides prompt notification and explanation to the district's technical/support staff of discovered software failures or functional defects; and immediate release of documented software correction must be made upon problem resolution.	High							
28	The vendor guarantees the timely response to reports of software failures or functional defects discovered during normal use of the product. The vendor shall present its plan to address and correct the reported problem including needed resources, time, and cost (if not covered in contracted maintenance agreement).	High							
29	The vendor provides sufficient management, user, and technical/support staff training and documentation in the event that significant functional or technical changes are made to the installed software solution.	High							
30	In the event that the software product is to be moved from the existing hardware platform to a different platform, the vendor will provide consulting and/or technical assistance in the planning and execution of such a move.	High							
31	The vendor business plan includes the ability to submit regular routine requests for improvement or changes in future upgrades via a User Group Forum. This process includes user feedback for proposed changes to future upgrades.	High							
32	The vendor provides a software update service that furnishes regularly scheduled updates, annually and others as needed.	High							
33	The vendors software will always be updated to support the latest version of all underlying components (operating systems, databases, browsers, etc.)	High							
34	The installation of software updates preserves the integrity of district-defined fields and web pages previously customized by the district.	High							
35	The system provides the capability to migrate easily to new software releases (updates) and automatically convert the database.	High							

36	The vendor provides advance copies of release notes that describe the changes that will be applied with a patch or version upgrade.	High							
37	The vendor supplies annual support subscriptions and includes, at no additional charge, software maintenance.	High							
38	The vendor supplies annual support subscriptions and includes, at no additional charge, software updates.	High							
39	The vendor supplies annual support subscriptions and includes, at no additional charge, normal changes to the district requirements and state department of education requirements.	High							
40	The vendor supplies annual support subscriptions and includes, at no additional charge, customer support website.	High							
41	The vendor supplies annual support subscriptions and includes, at no additional charge, weekly notifications by email.	High							
42	The vendor supplies annual support subscriptions and includes, at no additional charge, interactive on-line user groups.	High							
43	The vendor supplies annual support subscriptions and includes, at no additional charge, remote diagnostics and control capability by support technicians.	High							
44	The vendor supplies annual support subscriptions and includes, at no additional charge, unlimited toll-free telephone support.	High							
45	The vendor supplies annual support subscriptions and includes, at no additional charge, Fax line support.	High							
46	The vendor supplies annual support subscriptions and includes, at no additional charge, E-mail support.	High							
47	The vendor supplies annual support subscriptions and includes, at no additional charge, on-line searchable product Knowledge Base.	High							
48	The vendor supplies annual support subscriptions and includes, at no additional charge, FAQ online.	High							
49	The vendor limits annual support subscription cost increases to a range between 1% and 6% per year.	High							
50	The vendor provides a comprehensive maintenance plan for application software, hardware, and engineering services, including any updates.	High							
51	The vendor provides local on-site support.	High							
52	The vendor has the ability to provide for custom changes to standard code.	High							
53	The vendor supplies a description of the procedure by which the customer may request changes or enhancements.	High							
54	Prior to installation, the vendor must provide a detailed description of services to be rendered, together with a detailed schedule of events, to facilitate installation and start-up of the application software.	High							
55	What resources are available from the vendor to assist with the conversion of data from the previous Customer SIS?	High							
56	The vendor provides a description of the procedure for data conversion, including associated costs, from existing application software to the proposed vendor's system.	High							
57	The vendor provides information on the level of experience of all vendor employees who will be working on the data conversion from the previous SIS.	High							
58	The vendor assigns a single point of contact project manager during the migration from the legacy platform to the new platform.	High							
59	The vendor provides technical training to system administrators and technical developers and users.	High							
60	The vendor provides technical documentation to system administrators and technical developers and users.	High							

NSD Cost Workbook

Table of Contents

Bidder:	

← **Insert Bidder Name here.**

Worksheet Title / Hyperlink	Description
A3-1. Total Cost Summary	Worksheet for Bidder to provide a summary of the total proposed costs.
A3-2. Software Costs	Worksheet for Bidder to provide one-time Software costs of the NSD solution.
A3-3. Hardware Costs	Worksheet for Bidder to itemize all one-time and ongoing hardware costs.
A3-4. DDI Services Costs	Worksheet for Bidder to provide one-time costs for Design, Development and Implementation of the NSD.
A3-5. Support Services Costs	Worksheet for Bidder to provide ongoing maintenance and operations (M&O) support costs.
A3-7 Payment Schedule	Worksheet for Bidder to describe the payment schedule.
A3-8. Pricing Assumptions	Worksheet for Bidder to provide Pricing Assumptions.
A3-9 Alternative Pricing	Worksheet for Bidder to provide alternative pricing structure (this is supplemental/additional for consideration after responding to requested format).
A3-10 Supplemental Cost Information	Please Complete this narrative Supplemental Cost Information Tab

PLEASE NOTE:

1. The Bidder's name should appear across all other worksheets.
2. Cells requiring Bidder data entry are marked in light-green highlight to clearly indicate which cells are available for data entry as indicated above left.
3. Cells that contain titles and formulas are marked in gray high-light.
4. Cells that are not applicable are marked black.
5. It is the Bidder's responsibility to ensure the integrity of the Cost Workbook formulas and links.

NSD Total Cost Summary	
One-time NSD Costs	
Software Costs (Form VII-2)	\$0
Hardware Costs (Form VII-3)	\$0
Design, Development and Implementation Services Costs (Form VII-4)	\$0
Interface Costs (Form VII-4)	\$0
Unanticipated Tasks: Bidder Implementation Costs (10% of implementation costs)	\$0
Total One-time Cost	\$0

	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	Total
M&O NSD Costs						
Software License Costs (Form VII-2)	\$0	\$0	\$0	\$0	\$0	\$0
Hardware Costs (Form VII-3)	\$0	\$0	\$0	\$0	\$0	\$0
Support Services Costs (Form VII-5)	\$0	\$0	\$0	\$0	\$0	\$0
Total M&O Cost	\$0	\$0	\$0	\$0	\$0	\$0

Total NSD Costs	\$0

- NOTES:
1. On all worksheets, the Bidder must not enter data into any field that is shaded grey.
 2. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
 3. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.

NSD Bidder Software Costs

Software Item Description and Specifications (Prior to System Acceptance)
Required SIS Software (included in module)
Required SIS Software (not included in module)
3rd Party Software
Optional Software
Tools and Utilities
System Software
Operating System
Other System Software
[Insert for each Software Component]
Subtotal

One-Time Software Costs			
Quantity	Unit Cost	License Type	Total One-Time Cost
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
		Enterprise	\$0
			\$0

Software Item Description and Specifications - (Post System Acceptance)	
Software Component 1	
Software Component n	
:	
:	
[Repeat for each Software Component]	
	Subtotal

[illegible]

NOTES:

1. The Bidder shall describe all proposed software indicating manufacturer, brand name, module name and version number for the items being proposed.
2. An enterprise licenses is a single single software license for all enterprise users.
3. In addition to Enterprise licenses, the Bidder may propose different software license types for NSD consideration.
4. All costs associated with the purchase, delivery, installation, and production of the SSI software components shall be loaded into the Unit Cost column. The Bidder may provide an alternative costing approach based on cost drivers such as lease or usage, but shall still commit to a firm fixed annual cost.
5. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
6. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.
7. For Bidders proposing a any new development components for the SIS, costs associated with development shall be included in this worksheet.

NSD - Cost Proposal

Hardware Costs

0

Hardware Costs											
Hard-ware Item #	Hardware Item	Per Unit Cost	Quantity	#REF!	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	#REF!	#REF!
1	Item 1			\$0						\$0	\$0
2	Item 2			\$0						\$0	\$0
3	Item 3			\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
Total Hardware				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Hardware Specifications					
Hard-ware Item #	Hardware Item	ment (e.g., Dev, Q1, Q2, Training, Stage,	Manu- facturer	Detailed Description (e.g., number of processors, amount and type of storage and memory, type of network card)	Operating System
1	Item 1				
2	Item 2				
3	Item 3				

Notes:

1. The Bidder shall describe all proposed hardware.
2. All costs associated with the purchase, delivery to the NSD-specified site, licenses (e.g., operating system) of the hardware shall be loaded into the Per U The Bidder shall be responsible for the risk of loss or damages that occur during delivery of the equipment.
3. Costs shall include all environments (e.g., development, testing, training, pre-production, and production).
4. The Bidder may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.

5. All hardware/software and associated warranty and maintenance documents may be purchased in NSD name. In such a case the Bidder must provide to documentation related to hardware/software purchases including, but not limited to invoices, packing slips, license agreements, and other details that may be for audit and accounting.
6. Hardware Items in the Hardware Costs table shall correspond to the Hardware Items in the Hardware Specifications table.

Earliest Proposed Purchase Date

nit Cost.

NSD all
e required

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)
Project Management and Planning	
Project Management Plan	
Communications Management Plan	
Project Charter	
Change Management Plan	
Weekly Written Progress Reports	
Monthly Status Reports	
Contract Close-out Action List and Deliverables	
<i>Project Management Execution Activities</i>	
Total Project Management Deliverables and Activities	0
Technical Environment Installation and Configuration	
Specifications for all necessary hardware, software and tools	
Technical Infrastructure Description (including hardware and system software and tools)	
Environment Configuration Manual	
Source code and object (executable) code	
<i>Technical Environment Installation and Configuration Activities</i>	
<i>Insert as proposed</i>	
Total Environment Installation and Configuration Deliverables and Activities	0
Business Process Change Management	
Business Process Management Plan	
<i>Business Process Management Activities and Outcomes</i>	
<i>Insert as proposed</i>	
Total Business Process Change Management Deliverables and Activities	0
Knowledge Transfer and Training	
Knowledge Transfer and Training Plan	
Training Documentation	
Training Course Outline	
Training Packages and Materials	
Training Manuals	
Updated Training Documentation	
<i>Knowledge Transfer and Training Activities</i>	
<i>Insert as proposed</i>	
Total Knowledge Transfer and Training Deliverables and Activities	0
System Development - Design, Configuration, Development and Customization	
Systems Engineering Management Plan	
Design and Development Plan (Software Development Plan)	
Business Continuity Plan	
Test Plan	
Testing Tools, Test Configurations, and Related Documentation	
Test Scripts, Test Results and Quality Reports	
Problem Resolution Management Plan	
Problem Resolution Tracking System	
<i>System Development Activities</i>	
<i>Insert as proposed</i>	
Total System Design, Development and Customization Deliverables and Activities	0

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)
System Installation and Implementation	
Implementation Plan	
Performance and Capacity Plan	
Operational Recovery Plan	
Interface Management Plan / Design Description	
Interfaces Outcomes	
Software Configuration Management Plan and System	
Requirements Management Plan	
Requirements Traceability Matrix	
On-site Implementation Support Plan	
Pre-Implementation Readiness Assessment	
Production Release Plans	
Lessons Learned Document	
NSD Deployment at NSD Location	
<i>System Installation and Implementation Execution Activities</i>	
<i>Insert as proposed</i>	
Total Implementation Deliverables and Activities	0
Security	
System Security Plan	
<i>Insert as proposed</i>	
Total System Security Deliverables and Activities	0
Quality Management	
Quality Management Plan	
<i>Quality Management Activities</i>	
<i>Insert as proposed</i>	
Total Quality Management Deliverables and Activities	0
Production Support and Transition	
Production Support and Transition Plan	
Maintenance Activity Report	
System Operation Manual	
System Documentation	
Disaster Recovery Plan	
System Administration Procedures	
Help Desk Plan (Business and technical)	
Help Desk Scripts and Decision Trees	
System Acceptance Document	
Maintenance and Operations (M&O) Plan	
<i>Production Support and Transition Activities</i>	
<i>Insert as proposed</i>	
Total Production Support and Transition Deliverables and Activities	0
Interfaces	
Interface Development Activities	
<i>Insert as proposed</i>	
Subtotal	0
Total System Implementation Costs	0

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)

NOTES:

1. The Bidder shall identify all proposed deliverables being provided and any other one time costs not captured in the detailed hardware and software costs. Proposed deliverables must include each of the deliverables defined in the worksheet above plus additional deliverables that the Bidder recommends.
2. All tasks associated with the services proposed for NSD shall be included in the total cost for that service.
3. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.

NSD Bidder Support Costs

Maintenance and Operations (M&O)

Bidder M&O Support Costs	M&O Costs														
	Number of hours	Hourly Rate	YR 1 M&O	Number of hours	Hourly Rate	YR 2 M&O	Number of hours	Hourly Rate	YR 3 M&O	Number of hours	Hourly Rate	YR 4 M&O Estimate	Number of hours	Hourly Rate	YR 5 M&O (Estimate)
Staff Position															
Project Manager			\$0			\$0			\$0			\$0			\$0
Business Analyst			\$0			\$0			\$0			\$0			\$0
Data Base Administrator			\$0			\$0			\$0			\$0			\$0
Network Administrator			\$0			\$0			\$0			\$0			\$0
Trainer			\$0			\$0			\$0			\$0			\$0
Help Desk			\$0			\$0			\$0			\$0			\$0
Total			\$0			\$0			\$0			\$0			\$0

- NOTES:
- 1. The Bidder shall describe all proposed Bidder-provided support services items.
 - 2. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
 - 3. M&O costs will be paid monthly in arrears.

NSD Cost Workbook
Labor Rates

0

Staff Position	Compo-site Weight %	Hourly Rate	Compo-site Rate	Senior/Junior	Bidder or Subcontractor Name
Project Manager			\$0		
Technical Lead			\$0		
Functional Lead			\$0		
Transition/Deployment Lead			\$0		
Training Lead			\$0		
Change Management Lead			\$0		
Trainers			\$0		
Help Desk			\$0		
Other			\$0		
			\$0		
Composite Rate	0%		\$0		

Notes:

1. Use the tables on this worksheet to provide Bidder/subcontractor hourly labor rates for the various classifications and grades of project personnel.
2. Bidder/subcontractor hourly labor rates must be inclusive of all travel, per diem, and any other related expenses.
3. The Bidder may include additional Staff Position titles to accurately represent the classifications it uses for describing the various classifications and grades of its Projects personnel, but it must include at a minimum all Key Positions listed in the tables above.
4. If the Bidder's existing titles differ from those listed for projects, it must map its titles to the listed categories to the extent possible and provide its mapping reference in Form A3-8, Pricing Assumptions Worksheet.
5. Bidders may insert additional rows as required for projects. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.
6. The Composite Rate Percentages for projects shall correspond to the associated Staff Position level of effort and the total must equal 100%.
7. Individual and composite hourly rates shall not increase greater than 5% per year.

NSD Bidder Payment Schedule					
Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start)	Deliverable Group Payment %	Maximum Deliverable Group Payment %	Deliverable Group Payment
Project Management	Project Management Plan, Communications Management Plan, Project Charter, Change Management Plan			5.00%	0.00%
	Weekly Written Progress Reports				
	Monthly Status Reports				
	Contract Close-out Action List and Deliverables				
Technical Environment Installation and Configuration	Specifications for all necessary hardware, software and tools, Technical Infrastructure Description (including hardware and system software and tools) for each of the five environments			5.00%	0.00%
	Environment Configuration Manual				
	Source code and object (executable) code				
Business Process Change Management	Business Process Management Plan, Business Process Management Activities and Outcomes			5.00%	0.00%
System Development - Design, Configuration Development and Customization	Systems Engineering Management Plan, Design and Development Plan (Software Development Plan)			10.00%	0.00%
	Business Continuity Plan				
	Test Plan				
	Testing Tools, Test Configurations, and Related Documentation, Test Scripts, Test Results and Quality Reports				
	Problem Resolution Management Plan, Problem Resolution Tracking System				
	System Security Plan				
	Quality Management Plan				
System Implementation and Testing	Implementation Plan, Performance and Capacity Plan, Operational Recovery Plan			15.00%	0.00%
	Interface Management Plan / Design Description, Interfaces Outcomes				
	Software Configuration Management Plan and System				
	Requirements Management Plan, Requirements Traceability Matrix				
	On-site Implementation Support Plan				
	Pre-Implementation Readiness Assessment, Production Release Plans				
	Pilot Plan, Lessons Learned Document (Pilot Complete)				
Interfaces				5.00%	0.00%
Knowledge Transfer and Training	Knowledge Transfer and Training Plan			10.00%	0.00%
	Training Documentation, Training Course Outline				
	Training Packages				

NSD Bidder Payment Schedule					
Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start)	Deliverable Group Payment %	Maximum Deliverable Group Payment %	Deliverable Group Payment
Deployment	Training Manuals				
	Updated Training Documentation, Knowledge Transfer and Training Activities				
	Lessons Learned Document (Pilot Complete)			40.00%	0.00%
	HCSS Deployment at NSD Site 1				
	HCSS Deployment at NSD Site 2				
	HCSS Deployment at NSD Site 3				
Production Support and Transition	Production Support and Transition Plan			5.00%	0.00%
	Maintenance Activity Report				
	System Operation Manual				
	System Documentation				
	Disaster Recovery Plan				
	System Administration Procedures				
	Help Desk Plan (Business and technical), Help Desk Scripts and Decision Trees				
	System Acceptance Document				
	Maintenance and Operations (M&O) Plan				
	Total		0.00%	100.00%	0.00%

NOTES:

1. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.

NSD Cost Workbook
Pricing Assumptions

#REF!

Item #	REFERENCE (Section, Page, Paragraph)	Description	Rationale	Cost Impact if the Assumption Turns out Not to be Valid
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

Notes:

- Pricing shall be based on NSD provided Contract terms and conditions and Mandatory Requirements of the RFP (not the Bidder's exceptions to the Contract Terms and Conditions). The Bidder is required to state all Pricing Assumptions upon which its pricing is being determined. Insert as many lines as necessary. Assumptions shall not conflict with Contract terms and conditions or Mandatory Requirements of this RFP.
- The Bidder shall provide pricing consistent with the following:
 - Apply the pricing in accordance with the Contract Terms and Conditions and Mandatory Requirements of the RFP.
 - Clearly identify and explain all of the pricing assumptions made, upon which pricing is predicated including the cost/pricing impact if the assumption turns out not to be valid.
 - State if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.

Alternative Pricing
<Enter Service Provider Name>
Services Category

Alternative Services

Service Component	Unit	Cost	Comments	Period 1	Period 2	Period 3	Period 4
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
Totals							
Total Estimated Additional Costs				\$0	\$0	\$0	\$0

Please Complete this narrative Supplemental Cost Information Tab

1. Discuss software pricing methodology. Describe items such as license cost per seat, per named user, per module, per server, per site/organization. Provide your definition of how you determine a seat, named user,
2. Describe how you price software installed in various environments (e.g., development, testing, training, disaster recovery, operational).
3. Provide a description of your strategy for maintenance agreement pricing after the initial term of the maintenance agreement has ended or after additional software has been licensed.
4. Please describe your proposed framework for compensation addressing a risk/reward mechanism (i.e. indicate how you should be paid based on performance and completion of deliverables).
5. Describe your proposed approach and cost structure for change orders. Describe the cost structure for any ongoing service requests made by NSD.
6. Please describe your proposed expense structure and specific areas of expense other than those included in the cost workbook.
7. What additional early payment discounts are offered?
8. Please describe your proposed cost containment framework for expenses and how you have built efficiencies into your project plan.
9. Please describe any additional discounts/incentives available to NSD which will minimize the Total Cost of Ownership for the Student Information System Solution.
10. Please clearly identify and explain all the assumptions (Tab Pricing Assumptions) upon which your software license and maintenance fees, implementation costs and approach are predicated. Please also state if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.



Northshore
School District
3330 Monte Villa Pkwy
Bothell, WA 98021
425-408-7651

Purchasing Department

**NORTHSHORE SCHOOL DISTRICT #417
REQUEST FOR PROPOSAL**

Student Information System Solution and Implementation Services

Northshore School District is requesting proposals from qualified vendors for Student Information System (SIS) Solution and Implementation Services.

Interested vendors may request a proposal document by contacting Northshore School District, Purchasing Department, (425) 408-7651.

Proposals will be received by Northshore School District up to but not later than 2:00 PM, Friday, **DATE**. Sealed envelopes shall be marked "Request for Proposal – "Student Information System" and be addressed to the attention of Candace Manthey, Purchasing Manager, 3330 Monte Villa Parkway, Bothell, WA 98021.

A District technical evaluation team will review all proposals and vendors whose response best meets the critical requirements may be requested to demonstrate their application to the team. The selected vendor will be recommended for award to the Board of Directors.

Dated this **DATE**

Candace Manthey, Purchasing Manager
Northshore School District

Publication Dates: Seattle Daily Journal of Commerce
DATES

STUDENT INFORMATION SYSTEM

ATTACHMENT A

CERTIFICATION

Pursuant to and in compliance with this Request for Proposal and all documents relating thereto, the undersigned hereby offers to furnish and deliver any or all of the articles enumerated at the prices quoted herein.

Organization Information

Legal Firm Name _____

Printed Name and Title

Authorized Signature

Address

City, State, Zip Code

Telephone

Fax Number

Email Address

Dated

Acknowledge receipt of addendum # _____ through _____.

	Response
SIS Proposing VENDOR NAME	
Vendor Company Headquarter Address and Telephone Number	
Total Revenue in 2012	
% of revenue from clients in K-12 Education.	
% of revenue from K-12 Student Information Systems	
% of revenue from Other Solutions	
Please attached Audited Financial Statements	
Number of Service Delivery Employees	
Number of Employees providing Integration Services	
List of Locations in North America	
List of Locations in Other Geographies	
Vendor's Staff Primary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	
Vendor's Staff Secondary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	

	Reference 1 (Required)	Reference 2 (Required)	Reference 3 (Required)
School District Name (Reference)			
Version of Proposed SIS Solution Implemented			
Scope of Services Provided			
Contract Size (\$) Estimate			
Project Start Date			
Project Completion Date (if in progress, state expected Completion Date)			
Contract Term			
Reference Contact Name and Title			
Reference Contact Telephone Number			
Reference Contact Address			
Reference Contact E-mail			

Names of Vendor's Manager and Project Manager			

Reference 4	Reference 5	Reference 6

	Subcontractor 1	Subcontractor 2
SUBCONTRACTOR NAME		
Type of Legal Entity		
Company ownership (i.e., private/public, joint venture)		
Jurisdiction of Company Formation		
Headquarters Location		
Date Founded		
Number of employees		
Audited financial statements (last three years)		
Proposed Products or Services to be provided		
Experience of subcontractor in performing the services to be provided		
Brief description and number of projects that Implementation Partner has partnered with this subcontractor		
Locations where work to be performed		

Subcontractor 3

	Project 1 (Required)	Project 2 (Required)	Project 3 (Required)
School District			
Scope of Services Provided			
Version of Proposed Solution Implemented			
Contract Size (\$) Estimate			
Project Start Date			
Project End Date (if in progress, state expected End Date)			
Contract Term			
Contact Name and Title			
Contact Telephone Number			
Contact Address			
Contact E-mail			

Names of Vendor Engagement Manager and Project Manager			

Project 4	Project 5

	Previous Client 1	Previous Client 2	Previous Client 3
School District			
Scope of Services Provided			
Version of Proposed Solution Implemented			
Contract Size (\$) Estimate			
Project Start Date			
Project Stop			
Contract Term			
Contact Name and Title			
Contact Telephone Number			
Contact Address			

STUDENT INFORMATION SYSTEM

ATTACHMENT C

COOPERATIVE PURCHASING INFORMATION

In the event another area school district or public entity has the need for the same product or services, they may wish to utilize another executed bid in the area. RCW 39.34 allows cooperative purchasing between public agencies in the State of Washington. Public agencies that have, or in the future file an Interlocal Cooperative Purchasing Agreement with the District may purchase from the District's contracts, provided that the Bidder has agreed to such participation.

Each school district or public entity would act as an independent agency and take responsibility for its own purchase orders, payment procedures, evaluations, and scheduling of Bidder's services. Each entity will also take responsibility for performance of any purchasing contract with Bidder. The District will not have any responsibility or liability for orders issued by other public agencies utilizing the District's contract through an Interlocal Agreement.

Bidders' responses to allow cooperative purchasing will not have any weight in the evaluation process for this request for proposal nor will they be evaluated negatively if they choose to not participate in an Interlocal Agreement.

Each Bidder shall indicate on this form whether it will honor the pricing and terms and conditions to other public agencies in accordance with this Agreement's terms and conditions.

As per the terms and conditions of this contract, will the Bidder allow public agencies in addition to Northshore School District to purchase from this contract?

Yes _____ No _____(check one)

If yes, Bidder will have opportunity to review ability to perform/deliver to requesting agencies prior to commencement of services.

Vendor Proposed Staffing Plan

Instructions: Vendor shall provide number of FTEs based on proposed approach. This should tie in with Cost Proposal FTEs from Cost Proposal Worksheet (Excel). Vendor must modify/add similar sheets as necessary or applicable and indicate any off-shore staffing.

Please format spreadsheet to meet space requirements.

Project Wave				2013				
				Mo 1	Mo 2	Mo 3	Mo 4	Etc.
Project Management & Preparation								
Requirements Analysis & Design								
Solution Implementation								
Testing & Preparation for System Go-Live								
Go-Live & Deployment								
Pre-Stabilitation & Post Go-Live Support								
Organizational Change Management Support								
VENDOR STAFFING								
	Team	Project Role	Rate per Hour	Mo 1	Mo 2	Mo 3	Mo 4	Etc.
Project Planning								
<i>SAMPLE ORG LEVELS ONLY. Insert Org Levels below and should correspond with proposed org levels and rate cards in Cost Proposal.</i>								
Partner				0	0	0	0	
Director				0	0	0	0	
Senior Manager				0	0	0	0	
Experienced Manager				0	0	0	0	
Manager				0	0	0	0	
Experienced Consultant				0	0	0	0	
Consultant				0	0	0	0	
Experienced Analyst				0	0	0	0	
Business Analyst				0	0	0	0	
Project Management								

Apply corresponding color scheme here based on proposed time

Project Wave				2013				
				Mo 1	Mo 2	Mo 3	Mo 4	Etc.
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Functional Areas and Solutions								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Technical Areas and Solution								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	
Deployment and Support								
<i>Insert Org Level as listed in the example levels above</i>				0	0	0	0	

kbook (MS-

2014				
Mo 1	Mo 2	Mo 3	Mo 4	Etc.

shades on left column
frames.

Mo 1	Mo 2	Mo 3	Mo 4	Etc.
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

Staffing Plan

A5_NSD_Proposed_Solution_and_Staffing.xlsx

11/27/2018

2014				
Mo 1	Mo 2	Mo 3	Mo 4	Etc.
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

Please format spreadsheet to meet space requirements.

Proposed Software Solution					
List all item software included and necessary to operate the proposed Student Information System solution. List should match cost proposal line items. Note: Add more lines as necessary.					
Item #	Required/Optional	Core Package Name	Module/Application Name	Version/Release	Operational/ Included in Proposal and Can be demonstrated to District (Y/N)
1					

Proposed System Software					
List all item system software included and necessary to operate the proposed Student Information System solution. Note: Add lines as necessary.					
Item #	Component	Specification	Qty *	Use (e.g., Development, Testing, Training, Production, etc.)	Included in Proposal or Optional?
1					

Notes:

* Include number of licenses, seats, etc., depending on licensing methodology
Add more lines as necessary; this should match cost proposal line items

Proposed Supplemental Software	
Provide complete description of any supplemental software/products required for proposed solution. Supplemental components may include developer optional in order to meet BVSD requirements. Note: Add more lines as necessary.	

Item #	Supplemental Package Name	Description of Business Requirement/Purpose	Required or Optional?	Qty	Use
1					

tion System solution.
essary.

Proposed No. of Licenses	Date First Installed	Installed Sites (or Indicate Client Reference)

at tools, configuration management tools, etc., required or

Most Recent Installation Date	Installed Site(s) or Client Reference

Please format spreadsheet to meet space requirements.

Summary of Recommended Hardware				
Recommend all hardware infrastructure necessary to ensure successful implementation and on-going operation of proposed solution for a minimum of one year following completion of implementation. Note: Add more lines as necessary.				
Item #	Component	Specification	Qty	Use (e.g., Development, Testing, Training, Production, etc.)
	Servers			
	Network Components			
	Other (specify)			

Response Instructions to Functional Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	~~Requirement will be met through changes to the existing reports or programs. This would include custom code developed to~~ perform specific functions or validations outside the standard code. Include the creation of a new report, query of workflow that does not exist within the current solution. Note: In the Comments column next to this response, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Modification	M	Requirement will be met through changes to the source code which would require analysis and re-application during future updates, upgrades, or when applying software patches.
Supplied by Third Party	3	Requirement will be met by third-party software package and is included in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.
Note:		
1. An omitted response will be assumed to be the same as a response code of "N".		
2. Any deviation from the response codes will be re-coded at the discretion of NSD.		

In this Worksheet there are 18 Tabs. Each must be completed with codes above.

- 1 Mandatory Requirements
- 2 General Functional Requirements
- 3 Registrations

- 4 Attendance
- 5 Scheduling
- 6 Grading
- 7 Transcripts
- 8 Graduation Requirements
- 9 Special Programs
- 10 Special Education
- 11 Student Behavior
- 12 Student Health
- 13 Fines and Fees
- 14 Assessments
- 15 Administrator Portal
- 16 Teacher Portal
- 17 Parent - Student Portal
- 18 State Reporting

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Mandatory Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The solution the Vendor is proposing must have been used and responsible for a successful installation for state reporting with full operation for the relevant data file for the 2010-2011 school year. The school district using the system must have had a student enrollment of comparable size to the District.	Mandatory							
2	Vendor must have been in business for at least 5 years and must be able to provide evidence of active installations, including at least one in a school district of comparable size of the District.	Mandatory							
3	The application software must be a web-based solution specifically developed to run in the Web environment. This means that all of its functionality must be accessible via a Web browser.	Mandatory							
4	The Vendor and the software must support for the latest Standards-Compliant Browsers.	Mandatory							
5	The solution provides a district-wide database for all student information with access to the historical as well as the current school year's data.	Mandatory							
6	The application must be in compliance with the Schools Interoperability Framework (i.e. SIF 2.X certified) and support interoperability with MS SharePoint and Learning Management Systems like Blackboard and Moodle.)	Mandatory							
7	The proposing vendor must be the Prime Contractor, responsible for all applications (including third-party components) and be the point of contact for all implementation, support, and training services.	Mandatory							
8	The vendor's licensing agreement must allow for the granting of a perpetual license for the use of their software.	Mandatory							
9	The system must have multi-user capabilities so as to allow multiple users access to the application at the same time.	Mandatory							
10	The vendor must have the capability to provide for custom changes or additions to the software to accommodate the business practices for the District.	Mandatory							
11	The vendor must have the capability to update and maintain the software for Federal, State Department of Education and the District's reporting compliance and accomplish this in a timely manner.	Mandatory							
12	The vendor must describe a project approach and propose a project manager for this project and the project manager is expected to be onsite during critical parts of the project as defined by the District.	Mandatory							
13	Users have access to the entry of next year data and to perform the next year scheduling activities.	Mandatory							
14	The application software must be designed for on-line, real time processing.	Mandatory							
15	Solution must provide an integrated report writer that provides ad hoc capabilities to end users with the ability to extract data out. The report writer functions should also provide the ability to limit (i.e., allow or prevent) access to student information based on the appropriate security.	Mandatory							
16	The district must have the ability to restrict access to confidential fields to only those users with the proper security by role-based and/or individual user (for example: social security number for students and teachers, state id numbers, prior state id numbers, student economic status, etc.)	Mandatory							
17	The user interface must provide field level validations as the users are entering data into fields on a given page as needed.	Mandatory							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Mandatory Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
18	The system should allow single update access but simultaneous multiple inquiry access. For example, two people should be able to view the same screen at the same time, but only one should be able to make changes. System should support large scale concurrent usage.	Mandatory							
19	The system's web screen design should conform to the standards for the Americans with Disabilities Act (Section 508).	Mandatory							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	General Functional Requirements	Priority	Y	C	M	F	3	N	
1	The system provides a consistent user interface to include screen layouts, report layouts, messages, field labels and date display.	High							
2	The system provides access to on-line help regarding screen or field description and its intended use. The help should include warnings, examples and error messages when appropriate. Allow the ability to customize the help with district specific items.	High							
3	The system shall provide, where appropriate, default values for fields.	High							
4	The system provides the ability to modify existing default values.	High							
5	The system provides utilities and/or tools for importing and exporting database data.	High							
6	The system provides the ability for 5000 employees to have concurrent access to the system.	High							
7	The system provides the capacity to support access for over 30,000 students and parents	High							
8	The system provides the ability for data input via multiple devices to include, but not limited to keyboard and mouse, scanners , and mobile devices.	High							
9	The system provides the ability to utilize multiple types of printers to include, but not limited to inkjet, laser, and plotters.	High							
10	The software shall be user friendly and operate in a manner in which school personnel follow in their daily positions.	High							
11	The reports must be easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report) and exported to a file.	High							
12	All reports must have extensive flexibility in the order the standard report information appears.	High							
13	The system provides a consistent user-interface, with similar front-end questions prior to producing a report.	High							
14	The application should provide for on-line notepad type features that allow the user to freely input narrative data.	High							
15	The system provides a comprehensive reporting tools that allows all data within the system to be reported with any other piece of data within any of the other software modules proposed.	High							
16	The size of the database must have the capability to maintain the legal retention schedule for records of public school districts (e.g. save grades 09-12 transcripts permanently, attendance records for 5 years, etc.)	High							
17	The system allows all reports to be viewed, printed, and saved via Adobe Acrobat. (PDF format)	High							
18	The system provides for multiple environments (i.e. for live, testing, training and development).	High							
19	The system provides for data entry assistance by providing pull-down lists to help user select valid codes for fields where this would be applicable.	High							
20	The system provides online help that pertains to the screen and field being accessed. The help should include warnings, examples, and meaningful error messages when appropriate.	High							
21	The system provides for easy addition of district-defined screens along with their field definitions. The authorized user may define field description, data type, data length, help text, default value, and validation tables. These fields are available for searches, for reporting and program tracking.	High							
22	The system provides basic report writer capabilities to access student information in a variety of formats such as PDF, Excel, txt, or csv format. The user may display the report to the screen, print to printer, import to Excel, send via email, or store it on disk.	High							
23	The system should allow for mass updates to certain fields (to make replacements directly in database) so that quick updates can be made by properly authorized system users.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	General Functional Requirements	Priority	Y	C	M	F	3	N	
24	The system provides adequate security access to data-altering utilities and editors to authorized personnel only.	High							
25	The system provides security in such a way that users only see only the menu options for which they have been authorized.	High							
26	The system allows each user to define their own favorite menu options to facilitate efficient access to menu options.	High							
27	The system allows query results to be saved to a Microsoft Excel spreadsheet.	High							
28	The system allows the individual users to have an initial page tailored to their individual needs, with access to favorites, scheduled tasks, completed tasks, and reports, etc.	High							
29	The application should provide for on-line notepad type features that allow the user to freely input narrative data.	High							
30	The system provides error messages in a consistent format across all system modules, for both batch and online processing. Specifically, error messages have like codes, text, and screen locations.	High							
31	The content of error messages should be customizable to be district-relevant and enhance the meaning of the message and direction provided to the user.	High							
32	The system provides error messages that are integrated with the online help function. For example, the data entry person should be able to click on an error message and open the online help document to the appropriate page.	High							
33	The system should provide online help features for all screen elements (fields and screen error codes) explained in plain English.	High							
34	The system provides the ability to add sound effect to error display.	High							
35	The system provides spell checking for all free text fields.	High							
36	The system allows validation tables to be maintained as specifications change. Obsolete values may be flagged as "Inactive" so that historical data integrity is maintained.	High							
37	The system allows dates to be entered in a variety of formats throughout the system, with or without using a pop-up calendar.	High							
38	The system allows during data entry, for users to be able to utilize recurring data entry tools including templates, copy and paste functionality.	High							
39	The system allows menus to be defined by administrative personnel to meet the needs of an individual user.	High							
40	Users can search and report data by using drop-down options that include comparison operators such as: = (equal to), < (less than), > (greater than), <= (less than or equal to), <> (not equal to), : (range), and * (wildcard).	High							
41	The system allows the user to query on any field in the SIS database for which he/she has been authorized.	High							
42	The system provides a menu crumb trail to facilitate navigation to all options of the system.	High							
43	The system must provide a consistent user interface. This includes screen layouts, report layouts, messages, field labels, and date displays.	High							
44	The system groups screens logically by function to facilitate data entry.	High							
45	The system should have the ability for a user to concurrently open multiple sessions/windows for both inquiry and updating with access to any combination of application modules, without losing any data previously entered on an open screen.	High							
46	The system provides a user customizable, single student summary page is provided to view and update student information.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	General Functional Requirements	Priority	Y	C	M	F	3	N	
47	The system provides the ability for a student picture to appear on all pages.	High							
48	The system provides a student alert message can be entered which will appear or flag a student whenever the student is included in a search list.	High							
49	The system is fully integrated - all areas of the application are fully integrated with all other areas, eliminating the need for redundant data.	High							
50	The system allows for scanning hard copy documents (birth certificate, vaccination forms, cumulative records, enrollment forms etc.) and linking them to corresponding student record (Document Imaging). Scanning should be processed locally.	High							
51	The system allows letters to be generated in multiple languages.	High							
52	The system provides an end-user search feature for standardized reports.	High							
53	The system provides ability to broadcast messages to notify users of certain events.	High							
54	The system has the ability to log communication between teachers and parents (i.e. Parent contact log, Daily Behavior log, etc.) electronically.	High							
55	The system must provide field level validations as the users are entering data into fields on a given page.	High							
56	The system tracks window usage by user.	High							
57	The system tracks report usage by user.	High							
58	The system provides audit trail of all adds, changes, and deletes at the record level by date, time, and user.	High							
59	System provides audit trail of all adds, changes, and deletes at the attribute level by date, time, and user.	High							
60	The system allows the District to easily access audit information programmatically.	High							
61	The system provides the ability to access all code lists via drop-down (pick list) boxes.	High							
62	The system allows all pick lists can be accessed by typing in letters of the pick list items to determine position on the pick list	High							
63	The system allows accessing pick lists by typing in letters is case-insensitive.	High							
64	The system allows district-defined codes to have active and inactive status and date that code became active.	High							
65	The system allows the removal of district-defined codes that are not in use.	High							
66	The system shall retain historical school names and dates they were in effect.	High							
67	The system's transaction entry screens should clearly indicate required fields.	High							
68	The system provides district and school equivalency fields for all codes.								
69	The system provides state equivalency fields for all codes.	High							
70	The system provides federal equivalency fields for all codes.	High							
71	The system supports database encryption.	High							
72	The system supports authentication via Active Directory (Windows Server 2008 functional level) with LDAPS support, logon for AD accounts with expired passwords, and requires no additional AD schema extensions	High							
73	The system supports for user provisioning/deprovisioning through Active Directory integration with district defined account templates - user account is still manually activated in SIS by district staff Example: a new user is created in the "Teacher" container in AD - account is automatically provisioned with standard teacher rights in the SIS, district staff can then review this account and easily activate it	High							
74	The system supports auto Logoff/Idle Timeout capability after district defined duration	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	General Functional Requirements	Priority	Y	C	M	F	3	N	
75	The system notifies the user of pending auto-logoff/idle timeout at a district defined time span (i.e. 2 min prior to auto-logoff/idle timeout, a message will warn the user, if the user click a confirmation button, the idle timer is reset)	High							
76	The system supports full SSL connectivity from clients to the application servers with wildcard SAN (Subject Alternative Name) certificate support	High							
77	The system supports the ability for the system administrator or similar to see who is currently online with username/IP/session length and which application server they are connected to	High							
78	The system supports HIDS (Host Intrusion Detection System)	High							
79	The system provides centralized / Host Remote Logging support	High							
80	The system allows one user to have a single logos to access multiple buildings.	High							
81	The system supports role and function-based security.	High							
82	The system supports granular security rights down to the field level including read, modify and delete.	High							
83	The vendor performs an independent security audit, by a 3rd party at least annually.	High							
84	The system provides an easy way to lock all users out of the system when necessary, e.g. during upgrade installations	High							
85	Conforms to security and confidentiality of student records as required by FERPA & HIPAA.	High							
86	The system provides the ability to copy one user's security to another user and provide for security templates.	High							
87	The system has the ability to give one user access to multiple or all schools.	High							
88	The system provides full multi-level security including database level security.	High							
89	The system provides full multi-level security including module level security.	High							
90	The system provides full multi-level security including functional level security.	High							
91	The system provides full multi-level security including screen level security.	High							
92	The system provides full multi-level security including field-level security.	High							
93	The system provides full multi-level security including report access security.	High							
94	The system controls the types of data a user can export (i.e. users can only export or report on certain fields based on their access level).	High							
95	The system provides pre-defined security reports listing authorized users (logins) and their security profile to authorized user.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
1	The system provides a way for all student information to be viewed from one section in the application. For example, to view discipline records, it should be within a short step from viewing a student's class attendance.	High							
2	The system provides a way to quickly view, from one central area: student basic information as listed under demographic data section.	High							
3	The system provides a way to quickly view, from one central area: address/relationship information as described in that section.	High							
4	The system provides a way to quickly view, from one central area: medical.	High							
5	The system provides a way to quickly view, from one central area: daily and class attendance.	High							
6	The system provides a way to quickly view, from one central area: course selections.	High							
7	The system provides a way to quickly view, from one central area: complete schedule.	High							
8	The system provides a way to quickly view, from one central area: grade summary and grade detail for each course.	High							
9	The system provides a way to quickly view, from one central area: discipline records.	High							
10	The system provides a way to quickly view, from one central area: testing information.	High							
11	The system provides a way to quickly view, from one central area: transcript information.	High							
12	The system provides a way to quickly view, from one central area: Special Education.	High							
13	The system provides a way to quickly view, from one central area: Medicaid.	High							
14	The system provides a way to quickly view, from one central area: busing.	High							
15	The system provides a way to quickly view, from one central area: school activities.	High							
16	The system provides a way to quickly view, from one central area: student pictures.	High							
17	The system provides a way to quickly view, from one central area: custody/guardianship.	High							
18	The system provides a way to quickly view, from one central area: Enrollment in special programs, e.g., English Language Learners.	High							
19	The system provides a way to quickly view, from one central area: Housing Subdivision-subdivision student lives in, e.g., View Ridge Apartments.	High							
20	The system must contain a student summary screen that incorporates key data elements from all other student screens including but not limited to: student name and address, residence address, subdivision, grade level, homeroom, counselor, special ed code, busing data, enter/left dates, current attendance letter code, current attendance status, class attendance status, and class the student is in at the moment the screen is displayed. The system must allow end users to be able to update data on this screen.	High							
21	The system provides a way for students' information to be retrieved by last name, first name, student ID or any portion of these items, whether separately or in combination. (e.g. the last two numbers of the ID entered are 32 and the first name starts with "Je". All matching records should come up.)	High							
22	The system must provide a way to be able to find a student or group of students with any combination of criteria in the database, including but not limited to the following example: name, counselor, grade, class, period, homeroom, program, locker, active status, selected user fields, school (all schools if cross enrolled), student ID, and state ID.	High							
23	The system tracks Student ID.	High							
24	The system tracks State ID .	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
25	The system tracks Student name .	High							
26	The system tracks Nickname and Preferred last name.	High							
27	The system tracks Student Legal Name separate from Preferred and goes-by names.	High							
28	The system tracks the student's first, middle, last names, preferred first/nickname and last names, and generation code (i.e. Jr., III, etc.) with the option to view and print.	High							
29	The system stores student gender and ethnicity, allowing for multiple races.	High							
30	The system calculates and displays the student's age as of Current Date, August 31st, and any other specified date.	High							
31	The system tracks Address - Alternate address.	High							
32	The system tracks Phone Including Student Cell Phone.	High							
33	The system tracks Student email.	High							
34	The system tracks Distance to school .	High							
35	The system tracks Gender.	High							
36	The system tracks Grade level .	High							
37	The system tracks Counselor's name.	High							
38	The system tracks Active status.	High							
39	The system tracks Year of graduation date.	High							
40	The system tracks Special Education Disability Code.	High							
41	The system tracks Student 504 plans.								
42	The system tracks Gifted Code.	High							
43	The system tracks Rank flag.	High							
44	The system tracks Bus stop and time - AM and PM.	High							
45	The system tracks Emergency transportation.	High							
46	The system tracks Ethnic and race code.	High							
47	The system tracks Previous school.	High							
48	The system tracks Next school.	High							
49	The system tracks Current homeroom.	High							
50	The system tracks Current sports eligibility.	High							
51	The system tracks Birthplace, state and country.	High							
52	The system tracks the language spoken at the student's home (Home Language).	High							
53	The system tracks the student's first language they learned to speak (Primary Language).	High							
54	The system tracks the language the student speaks (Language).								
55	The system tracks English as second language (esl code).	High							
56	The system tracks Food service code.	High							
57	The system tracks Siblings.	High							
58	The system tracks user defined fields.	High							
59	The system tracks Legal district of residency.	High							
60	The system tracks child of a military family.	High							
61	The system tracks Boundary school.	High							
62	The district and individual schools must be able to store a minimum of 10 addresses and relationships for each student.	High							
63	The system provides the ability to prioritize contacts and define access based on relationship, including where the student lives and who that student legally lives with	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
64	The system provides the ability to prioritize contacts and define access based on relationship, including who is the legal guardian, preferred first and last names	High							
65	The system provides the ability to prioritize contacts and define access based on relationship, including after school care and pick-up	High							
66	The system provides the ability to prioritize contacts and define access based on relationship, including mother and father relationship if separated or divorced	High							
67	The system provides the ability to prioritize contacts and define access based on relationship, including closest neighbor	High							
68	The system provides the ability to prioritize contacts and define access based on relationship, including closest relative after the legal guardians	High							
69	The system provides the ability to prioritize contacts and define access based on relationship, including release flag	High							
70	The system provides the ability to prioritize contacts and define access based on relationship, including home language code	High							
71	For each address, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. district and municipality code h. a system so mailings are sent to the appropriate individuals	High							
72	For each relationship, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. district and municipality code h. a system so mailings are sent to the appropriate individuals	High							
73	The system stores a home language code using NSDE defined codes. A separate preferred language of communication for the student and each guardian/contact shall be used by other areas of the system to produce communication and print report cards.	High							
74	The system stores students' State ID, State Prior ID, special education ID, in addition to the district assigned local ID. The system allows only users with proper security to view or to update the State ID, State Prior ID and special education ID.	High							
75	The system stores and displays the student's active status with the option to view withdrawn students and withdraw history.	High							
76	The system calculates, displays, and stores the student's year of graduation date based on the first year the student entered the 9 th grade.	High							
77	The system includes the student's birth date and birth country.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
78	The system provides a district, building, street address, city, state, and zip "transferred from" field to allow the user to enter the previous school district information.	High							
79	The system tracks the student's previous and next year's school.	High							
80	The system conforms to security and portability of student records as required by FERPA.	High							
81	The system allows the display and maintenance of data for next year, including student's building, grade, counselor, homeroom, team, etc.	High							
82	The system provides an indicator for which guardian the student lives with or whether the student lives alone. This indicator shall include persons who are financially responsible. The system has an overall ability for to map flexible relationships.	High							
83	The system validates the student address and assign a school based on the student's grade level and address. The district must be able to define the school attendance zones with the possibility of splitting streets by odd or even lot numbers and splitting streets between cities.	High							
84	The system provides a method for each address to have separate fields for number, street name, direction, suffix, apartment space number, apartment complex name, City, State, and zip code.	High							
85	The system provides tracking of homeless students with a dropdown for the homeless residence. The drop down needs to be maintained by the district with only specific users should having secured access to this information	High							
86	The system tracks program of study.	High							
87	The system allows multiple types of graduation plans to be defined.	High							
88	The system tracks students' free/ reduced/paid lunch status along with date approval and transfer on entry/withdrawal to new school for each student.	High							
89	The system calculates and display school free/reduced lunch totals by school.	High							
90	The system tracks if Free/reduced waiver has been signed.	High							
91	The system tracks ELL contact minutes.	High							
92	The system tracks First Entry date into United States Schools.	High							
93	The system tracks ELL monitoring and exit reasons.	High							
94	The system tracks ELL eligible students not receiving services.	High							
95	The system tracks accommodations.	High							
96	The system tracks country of birth.	High							
97	The system has the ability to enter and track Testing Data that are specific to ELL within the system.	High							
98	The system has the ability, when ELL student rolls over to the middle school/high school or any time an ELL student transfers schools, the next school should be notified of the ELL status of this student. .	High							
99	The system tracks parent contact with documentation of phone calls / e-mails / visits (i.e. contact log).	High							
100	The system tracks students tested but did not qualify for ELL.	High							
101	The system tracks School History (like a resume of what schools attended and dates).	High							
102	The system has the ability to flag empty required fields.	High							
103	The system has the ability to scan Home Language Survey.	High							
104	The system tracks teacher ELL qualifications.	High							
105	The system tracks parent contact with documentation of phone calls / e-mails / visits (i.e. contact log).	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
106	The system tracks students tested but did not qualify for ESOL.	High							
107	The system supports students served that are enrolled in other Districts.	High							
108	The system provides Mass Update utilities for the Student Demographics, Entry/Withdrawal, and district-defined Demographic data tables allowing updating, adding, or deleting of information in the field specified in selected groups of records.	High							
109	The system provides administrative staff, nurse, teachers, and parents the ability to view the same student information screens based on security privileges.	High							
110	The system provides an on-line staff directory. Teachers are entered only once but may be assigned to multiple buildings.	High							
111	The system maintains instructional staff information such as employee ID, state id, name, initials and short name, buildings, team, department, homeroom, email address. The social security number is viewed and updated only by users with proper security.	High							
112	The system provides a room directory which is used to validate homerooms and course locations.	High							
113	The system provides a room catalog that includes the room's Building, Number, Name, and Maximum Seats. The room catalog shall be able to be modified	High							
114	The system allows mailing labels to be created for any group of students that meet selection criteria. Mailing label options will include allowing parents to receive one label when they have more than one child in the group. Mailing label options will include allowing option to generate as many labels as required.	High							
115	The system supports maintenance of codes and data entry choices to be set up and controlled at the district level to enforce standardization which can also be mapped to state codes	High							
116	The system allows the district to define the online enrollment entry pages and required fields for entering a new student. This should support multiple languages as appropriate.	High							
117	The system provides for the maintenance and storage of student history (for example, but not limited to, student name, address, phone number, enrollment history, grades and transcript, attendance record, classes attended, grade level completed and year completed) across all school years and without time limitation.	High							
118	The system provides view/print access to enrollment history for withdrawn students.	High							
119	The system maintains one student district record for each student while tracking information from multiple schools and programs over multiple years.	High							
120	The system supports federal requirement for multiple race categories per student.								
121	The system supports federal requirement for multiple ethnic categories per student.	High							
122	The system allows custom programming options when canned package fails to meet the district's needs.	High							
123	The system allows free/reduced/paid lunch information to be automatically imported/uploaded/posted from cafeteria management package (nutrition system) at regularly scheduled intervals (e.g., hourly, daily, etc.) with no human interaction.	High							
124	The system provides a search function allowing a selection of students based on a combination of fields in demographic and other areas. The student list and query should be saved in an excel file which can be easily saved onto a client desktop. Users should be able to save queries for future use. The system provides the ability to allow user generated reports to be saved as CSV, PDF files and webpages.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
125	The system provides the ability to search on the student's name using tools such as wildcards and Soundex.	High							
126	The system provides an alert message that will display when a user brings up a student's record, e.g., "Do not release this student to anyone except the primary guardian."	High							
127	The system provides alerts which can be viewed across system screens. The system allows free form text field within alerts and smart alerts that pop up on the main, attendance, and nurse pages, e.g. IEP, life-threatening, family, cross-enrolled.	High							
128	The system flags medical, legal, and disability alerts system-wide. These alert codes shall be table validated, dated, and defined by the district.	High							
129	The system has "smart" alerts with different designators (colors) for the type of alert. These alerts shall be displayed on all teacher screens. Highlighting the student name in the gradebook is one possibility.	High							
130	The system provides a way to indicate that a student is to be excluded from state reporting.	High							
131	The system provides for tracking of students who attend a school outside the district including name of the school, state id of the school.	High							
132	The system provides a way to track students attending a private school, but receiving services in the district. The tracking shall include the number of minutes per day.	High							
133	Allows district to specify alpha or numeric student ID's up to ten digits.	High							
134	The system generates automatic sequential assignment of student ID's while allowing users with appropriate security to override. The student ID must always be unique.	High							
135	The system provides a utility for the authorized user to change a student ID to a new user-specified number throughout the database.	High							
136	The system automatically links enrollment and withdrawal status to Average Daily Attendance (ADA) eligibility and all attendance and membership calculations.	High							
137	The system has the ability to conduct an automated transcript audit that enables a view of missing criteria/credit and creates an alert for graduating seniors.	High							
138	The system has the ability to work with student data while student is in a transition period. i.e. in district transfer students/students matriculating to another building.	High							
139	The system has the ability to report students enrolled in the wrong building with no approved transfer to the enrolled school.	High							
140	The system provides the ability to assign a school of attendance separate from the residence school and requires a valid reason code for this assignment.	High							
141	In order to assign residence schools to students, the system has the ability to maintain plan areas and attendance zones which can be used to tie addresses to schools at the appropriate grade level.	High							
142	The system allows for mass update of next year enrollment and end of year withdrawal based on subdivision and school boundary or projected school with the capability to override individual students.	High							
143	The system has the ability to pre-enroll students.	High							
144	The system provides the ability to have multiple mailings per student based on guardian addresses for automatically printing multiple copies of address labels, schedules, interim progress reports, report cards, attendance, medical, and discipline letters, etc..	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
145	The system supports extensive communications fields for students and guardians/contacts including fields for home phone, pager, fax, cell, employer's name and phone, email address, daycare name and phone, etc.	High							
146	The system allows the district to have the option as to whether to allow guardian/contact address/phone/email changes for students enrolled in a different school. If it is allowed, the system automatically notifies the office personnel at the other school.	High							
147	The system creates Entry/Withdrawal records whenever students enter into or withdraw from a district, building, grade, or calendar type. The user must enter a valid district-defined withdrawal reason code.	High							
148	The system displays Entry/Withdrawal records in chronological order with the most recent entry date at the top and the oldest entry date at the bottom.	High							
149	The system displays all of a student's entry/withdrawal records on one page for the entire time that the student has been enrolled in the district.	High							
150	The system has the ability to require withdrawal from one school before enrollment in another school.	High							
151	The system has the ability to allow enrollments in multiple schools for current and next year while maintaining a home school for both current and next year..	High							
152	The system provides the capability to track student's mobility within the district.	High							
153	The system shall retains student information for a district-defined number of years for both active and withdrawn students, across all school years and campuses.	High							
154	The system allows the District to set up programs and run reports where a student's entry and exit date for the program and associated fields can be tracked. The types of programs include but not limited to Gifted & Talented, Homeless, BIL/ESL/LEP, 504, PRS, Special Education, Title 1, Migrant, Immigrant, PEP, Dyslexia, etc.	High							
155	The system allows processing of school-to-school transfers.	High							
156	The system allows unique district-defined fields for each special program.	High							
157	The system provides a field to track if a student is a Foster Child.	High							
158	The system tracks immigrant date and type, and whether the student is identified as an immigrant under NCLB.	High							
159	The system tracks Title 1 instruction being administered, title 1 support services being offered.	High							
160	The system provides a field to store the number of years of education in the US, district, school.	High							
161	The system tracks dates or entry and exit and associated field and keeps a history as needed for state reporting.	High							
162	The system provides an end-of-school year process to mass update all students to their next year building, grade, homeroom, teachers, team, etc.	High							
163	The system has the flexibility for homeroom assignments to be either entered by individual students or mass assigned including being assigned by scheduling period or by user-defined criteria.	High							
164	The system allows for pre-registration of students within the district for the next school year without affecting ADA and Membership calculations and without including them in the reporting of current students.	High							

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#	Registration Requirements	Priority	Y	C	M	F	3	N	
165	The system tracks students for their association with another district. The district numbers are validated using a district-defined list.	High							
166	The system provides a student's withdrawal code to automatically flag a student as inactive throughout the database and automatically exclude the withdrawn student from reports, letters, and mailing labels, queries in all modules, unless otherwise indicated.	High							
167	The system provides a duplicate student check to be performed early in the enrollment process rather than at the end.	High							
168	The system provides the ability to track at-risk population and corresponding information for all criteria listed by the state and defined by the district.	High							
169	The system tracks transportation information for each student including route number, stop number, driver's license number, license plate, registration, and insurance information.	High							
170	The system allows Family Contact information to be copied to new siblings and a way to find potential family members during enrollment. The system has checks and reminders to make sure that this is not done carelessly and only allow parents/guardians in the system once.	High							
171	The system supports searches using user-defined criteria across years and schools.	High							
172	The system supports ability to search by family.	High							
173	The system stores membership information, book assignment, locker assignment, parking eligibility and decal number.	High							
174	The system provides the ability to assign lockers based on criteria such as grade-level. (i.e., assign a range of locker numbers to a grade-level including controls by odd & even numbers).	High							
175	The system supports tracking locker numbers, lock and serial numbers, and ability to report and export data as .csv files.	High							
176	The system tracks information (type of services to be received) for students with 504-plan, start and end dates.	High							
177	The system produces report showing program membership by dates, by campus, by program, etc.	High							
178	The system has the ability to automatically identify, report and optionally mass-update student's needing an At Risk Indicator based on information in the database. The information used would include but not be limited to LEP, discipline, grades, STATE TEST scores, and SSI code.	High							
179	The system allows scanned documents to be stored and organized with association to a student. Document management capabilities are an important requirement and a high priority for Special Education. The system has the ability to assign metadata.	High							
180	The system supports multiple households per family.	High							
181	The system provides notification if a student address and/or phone number already exist in the database.	High							
182	The system provides a parent/guardian/contact relationship code and title for each.	High							
183	The system tracks similar addresses for group mailings, (i.e. two students in the same household) to mail to only the unique address.	High							
184	The system allows addresses to be selected from a dropdown of valid addresses maintained at the district level.	High							
185	The system allows separate physical and mailing addresses for student and contacts.	High							
186	The system provides an effective date of address.	High							
187	The system has the ability to view student picture.	High							

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188	The system has the ability to store and view parent/guardian picture within the system.	High							
189	The system automatically re-size student pictures to fit the screen independent of the original photo size.	Medium							
190	The system supports automatically importing photos in mass and individually.	High							
191	The system provides emergency contact information includes physician, preferred hospital, and insurance information for each student.	High							
192	The system provides a drop-down list of valid hospital names is provided so the hospital doesn't need to be re-typed each time it is entered. This can be overridden as needed.	Medium							
193	The system stores the student's counselor name and id number.	High							
194	The system allows district-wide family management with ability to link siblings and household members across the district.	High							
195	The system provides a complete family profile on one screen.	Medium							
196	The system maintains family contact information with associations to each student under their responsibility in order to support district-wide Family Management and to track siblings and household members across the district.	High							
197	The system automatically searches district database for potential student matches and duplicate students as the registration information is being entered. (Date of Birth match should be an option, but not a requirement for match).	High							
198	The system checks address/relationship information to provide sorts for multiple mailings. Report cards, attendance letters, discipline letters, mailing labels and general notices must be sorted to allow multiple addresses and proper sorting.	High							
199	The system has the ability for this information to interface with an automated parent notification system that includes homework and e-mail notification of attendance and grade Reports.	High							
200	The system student information must include Medicaid and school activities data on the student.	High							
201	The system tracks every student's withdrawal, inactivation and reactivation to and from the district. The system must keep a continuous log of the transactions that can be viewed for each student in the student's main record. When these transactions occur, the data must be available without needing to re-enter demographic data as defined earlier.	High							
202	The system allows for student transfers and allow the demographic information to follow that student to the new school. All these transactions must be recorded and available to be viewed in the student's record.	High							
203	The system must account for students on home instruction.	High							
204	For any transaction that occurs to a student's grade, homeroom, CTE-tech, special education, resident, and/or calendar, demographic information, the system shall accurately record this data and have the data available to be viewed for each student.	High							
205	The system reports on transfer student by status, ethnicity, grade and location.	High							
206	The system tracks student withdrawal information (e.g. withdrawal reasons, withdrawal dates, comments etc.).	High							
207	The system has the ability to report any students enrolled in the wrong school (incorrect home school with no approved transfer to the enrolled school).	High							

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208	The system allows district defined enrollment and withdrawal codes and associate them to district specific codes.	High							
209	The system has the ability to require withdrawal from one school before enrollment in another school.	High							
210	The system allows pre-registration of new students for next year (i.e. incoming Kindergarten students) without counting them in the active students for the current school year.	High							
211	The system tracks student's mobility/enrollment history.	High							
212	The system allows for pre-registering, students to be registered, assigned to a campus, and scheduled without affecting ADA & Membership, and Food & Nutrition calculations. The system shall interface with the School Nutrition System.	High							
213	The system allows data changes to be entered with an effective date other than today.	High							
214	The system maintains one district student record while tracking information from multiple schools over multiple years	High							
215	The system allows for mass update of next year enrollment and end of year withdrawal based on grade-level, geocode/neighborhood school and approved transfers.	High							
216	The system allows withdrawal date to be recorded as the last day the student was in membership. Also, special program withdrawal dates can be recorded as the last day the student was served in program.	High							
217	The system tracks students who are dual attended (on multiple campuses).	High							
218	The system provides a withdrawal code to automatically flags student as inactive throughout the database. This code shall automatically exclude withdrawn students from reports, attendance letters, and mailing labels in all modules, unless otherwise indicated.	High							
219	The system allows the District to specify method of first day enrollment, indicating those present or flagging "no shows".	High							
220	The system provides quick links to auto-generated lists of recently enrolled or withdrawn students.	High							
221	The system tracks student's school assignment, grade, reason for entry, assignment date, homeroom etc.	High							
222	The system maintains status codes for students (i.e. pre-registered, active, inactive, deleted, etc.)	High							
223	The system supports automatic grade promotion process (e.g. from 4th grade to 5th grade) unless specifically marked in the system to hold student back.	High							
224	The system tracks and modifies school boundaries using computerized mapping tools (geo-coding).	Low							
225	The system does not allow assigned ID numbers to be re-assigned.	High							
226	The system has the ability to produce withdrawal form with all student information (i.e. Grades, attendance, resource requirements, discipline, etc.).	High							
227	When enrolling a new student, the system shall automatically check student information to ensure the student is not already enrolled (name, address, birthdate, etc.).	High							
228	The system has the ability to report current student enrollment by any size neighborhood (x,y coordinate range).	Low							
229	The system has the ability to report neighborhood demographic trends over multiple years for historical trends by neighborhood.	Medium							
230	The system has the ability to report transfers over multiple years (trends).	Medium							

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231	The system has the ability to run reports by enter code, including reports on out of district transfers by student information.	Medium							
232	The system has the ability to group addresses by pre-defined categories (i.e. Subdivisions or neighborhoods).	High							
233	The system calculates transfer capacity by school and by program (e.g. special Ed, ELL, bilingual classes) based on intended class sizes, projected enrollment etc.	High							
234	The system has the ability to modify and/or approve transfer capacity by school and by programs (i.e. special Ed programs).	Medium							
235	The system must support summer school as part of the next school year without the need to create a separate instance of the database or a separate school, and without disrupting the regular campus assignment or schedule.	High							
236	The system has the ability to produce registration/enrollment package (e.g. demographic information, class schedule).	High							
237	The system has the flexibility for homeroom assignments to be mass assigned either alphabetically by grade, by a selected period of the day or manually for individual students. When done by an individual student, the posting routine must allow students to be posted into a specific homeroom or be assigned to different homerooms at the time of posting.	High							
238	The system has the ability for a mass assignment routine for mass adding students to counselors alphabetically by grade is required.	High							
239	The system has a room table and homeroom table and make that data required.	High							
240	The system provides a locker table that ties a specific locker number or a lock to a series of one to five combinations. For the tumble locks, there should be a routine that assigns the new combination to the student. There should also be a free form area that can provide a description of where the locker is located.	High							
241	The system provides a counselor table.	High							
242	For posting data to user fields, The system provides a mass updating routines for all students or selected students by student, by grade, by homeroom and by counselor. Updating and posting must be available for one or more specific user fields.	High							
243	The system has the ability to input more than one email address per contact (particularly parents)	High							
244	The system has the ability to attach photos (of people not allowed to pick up a student, or of only people allowed to pick up student, etc.),	High							
245	The system provides board and district level reporting, fee reporting, incident reports, enrollments by grades, etc.	High							
246	The system provides an overall menuing system with simplicity and ease of finding information. It should incorporate the use of "favorites".	High							
247	The system allows administrators, teachers and counselors to directly contact parents by a click on the email address.	High							
248	The system automatically ties families together.	High							
249	The system has the ability to accept online registrations. Parents can view forms, enter information, electronically sign and submit registration packet via the internet.	High							
250	The system meets State Report Compliance for Washington.	High							

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Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Attendance Requirements		Y	C	M	F	3	N	
1	The system utilizes an attendance code table that relates an attendance code to a description, its associated number of days absent, tardy, days possible and a state code for the absence.	High							
2	The system provides a school-based daily attendance code table that can be copied into another school for their use.	High							
3	The system provides a calendar for the entire year that can be created by entering the start date and end date.	High							
4	The system allows each school to be able to create multiple calendars.								
5	The system allows each school calendars to account for holidays, snow days, in-service days, staff development days, marking period end dates, test days and half days.	High							
6	The system provides an on-screen view of the school calendar must be available.	High							
7	The system can accommodate year round school.	High							
8	The system provides for posting daily attendance for individual students with the flexibility to be done by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so on any part of either of the above areas.	High							
9	The system provides for the posting of daily attendance by homeroom with the options to be done by the individual day or by a range of dates.	High							
10	The system provides the ability to take attendance for students (e.g., special education, CAPS) that are taking classes in other buildings.	High							
11	The system provides for posting by homeroom, a list of students for that specific day must be displayed. The homeroom list must include student ID, grade, name, and a space to enter the day's code for that student.	High							
12	The system provides for the display of the attendance code description when entering the attendance code.	High							
13	The system provides for tardies; the system must have the flexibility to post by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so by any part of either of the above areas.	High							
14	The system provides for tardy entries that track the date and time of the tardy, the reason, optional free form narrative, and the associated daily attendance code.	High							
15	The system provides a reason for the tardy that ties the tardy code to the daily attendance table must be included to accelerate the data entry process. All codes that relate to this process must be available to be displayed for easy access to valid codes.	High							
16	The system displays a student's daily attendance in a variety of ways. Some ways required are to see the entire calendar with the attendance codes along with a key to the code's meaning. In addition, you must be able to view this information by date order, day of the week order, and by attendance code. All views must be able to appear on the screen and moving from one view to the other should not be a time consuming task.	High							
17	The system includes reports from the attendance code table and individual school calendars.	High							
18	The system provides a daily attendance list that has the flexibility to be produced for a specific date and for a specific attendance code. In addition, the school must have the option for the above list to include the phone number of where the student resides and an emergency number.	High							
19	The system displays student alerts on attendance screen.	High							
20	The system includes on every daily attendance absence list a narrative that will be displayed on the bottom of the list. This daily announcement must be user defined.	Medium							

21	The system provides an excessive absence list which includes the ability to specify a range of dates to consider and report on the number of absences and tardies within that range.	High							
22	The system provides an attendance statistical report for any specific year and month that shows the attendance code and total number in that code by gender and other criteria.	Low							
23	The system provides enrollment summary reports that calculate tardies and absentees by grade and sex, must be available. The report must also calculate the average daily attendance, average daily enrollment and average daily membership. This information must be available for any specific date for a specific student.	High							
24	The system provides an attendance report of all the students for a specific day and must include grade, homeroom, reason, and monthly total for the students' absences and tardies.	High							
25	The system provides multiple user defined letters to be stored and merged with the address/relationship information to notify family members of excessive absences.	High							
26	The system provides user defined class attendance codes and a reason for the absence that is tied to the attendance code for easy input.	High							
27	The system provides for attendance taking within the system that is intuitive and easy to use for teachers and administrators.	High							
28	The system must allow for the ability for mass entry of absences over multiple days by student or group of students.	High							
29	The system provides for posting of data to be performed by date or by class section.	High							
30	The system must be able to post students as entering late or leaving early and record the time of entering/leaving. The system must be able to record multiple entries for one class period, e.g., a student leaves for lunch with Mom and returns before the period is over.	High							
31	The system provides daily attendance that is updated in real-time from the class room teacher.	High							
32	The system provides the capability to pre-post or delete excused absences or field trip information. Posting routines must be available by class section, by individual student, grade or team to cover a single period or range of periods, including non-consecutive field trip days.	High							
33	The system provides the user should be able to view the total class absence for the student's entire school year and then pick certain courses to view marking period absence totals and then the specific days absence for each course.	High							
34	The system must contain tables that define multiple sets of the starting and ending times of each period. System must be flexible and support multiple bell schedules and early releases.	High							
35	The system is designed to calculate student days absence based upon district definition of how to calculate days absence from class absences.	High							
36	The system provides a report student attendance history, including days absence.	High							
37	The system provides a report of selected student attendance history based upon attendance criteria.								
38	The system provides a report of student summary attendance data.	High							
39	The system provides a report of daily class absence list.	High							
40	The system provides a report of excessive absence list for a range of dated class absences to include one or more categories related to excused, unexcused and/or unlawful	High							
41	The system provides a report of ability to flag 5, and 10 unexcused absences per month and per semester.	High							
42	The system provides a report of excessive absence letter for a date range of absences to include one or more categories related to excused, unexcused and/or unlawful, e.g., support reporting of more than 7 class period absences.	High							
43	The system provides the ability to create an attendance calendar that reflects the classes being taught for the number of hours/periods for a specific day.	High							
44	System must provide for the configuration of absence alerts. These should "pop up" or appear distinctly for each student when user defined absence criteria are met.	High							
45	The system provides absent dates to be entered for valid dates as designated on the school's calendar. Also, the student must be enrolled on the date specified.	High							

46	The system allows a student who is taking classes in more than one school, he or she will appear on the attendance list for the appropriate school for each of his/her classes. Full day absences should roll over to all buildings where the student is cross enrolled.	High							
47	The system provides the ability for a student transfers schools or courses, attendance information is still available.	High							
48	The system provides absence records that can only be entered or updated by users who have been given the proper security.	High							
49	The system allows attendance history to only be entered or updated by users who have been given the proper security.	High							
50	The system allows authorized user to configure number and types of absences which will trigger parent notification.	High							
51	The display of the school's calendar shows an indicator for each type of nonattendance day (such as holidays, in-service days, staff development days, district-defined day types).	High							
52	Absence notifications may be sent to guardians by letter or email and will support multiple languages.	High							
53	Automatically notify appropriate recipients when a student reaches a district-specified number of absences; excluding students who are exempt.	High							
54	After absence corrections have been made to a prior reporting period, the user may run a revised attendance report for the prior period.	High							
55	The system must provide a Teacher Attendance Verification report requiring the teacher's signature to use for auditing purposes. This report must include each student's dates absent, present, and enrolled and distinguish between funded and non-funded absences. It must include for each student the total membership, total absences, total ineligible membership, and total eligible membership for the Average Daily Attendance accounting period. The report must include all days for the grading period being run. The report must include totals for the class and grand totals for the report.	High							
56	The system must be able to report teachers' compliance on taking attendance and will provide a notification to the teacher when attendance has not been completed within a specified amount of time.	High							
57	The vendor must be capable of modifying the system to accommodate any changes or new requirements from the district.	High							
58	The system allows the user to query and run a report to get a list of student absences.	High							
59	The system provides for attendance for withdrawn students to be readily and easily available.	High							
60	The user must be able to run a Perfect Attendance Report (as defined by the district).	High							
61	The system provides s audit trail management.	High							
62	The system must support taking attendance on an alternate bell schedule for a given date. For example, semester exams may be given on a day where only period's 4 - 8 meet.	High							
63	Ensure that absences cannot exist for a student on days that the student is not enrolled. The system must automatically find and delete the invalid absences.	High							
64	Student absences may be easily maintained on a class or daily basis. The absences are easy to display and report on.	High							
65	The system must be able to take attendance on non-regular class related activities, e.g., testing days.	High							
66	The system supports full district level reporting, analysis, and data mining.	High							
67	The system allows attendance policy violations (APV) to be removed or overridden.	High							
68	The system provides the option to prevent teachers from overwriting absences entered by the office.	High							
69	Allows excessive absence reports to be run based on different criteria.	High							
70	Query students with more than user specified number of unexcused school days or periods	High							
71	The system provides ability to print letters to parents based on percent absent and /or days absent.	High							
72	Attendance letters may include both demographic and attendance information.	High							
73	Teachers are allowed to view attendance information only for their students.	High							

74	The system provides s a daily absence office report with phone numbers that is quick and easy for attendance personnel to use.	High							
75	The system provides s both summary and detail attendance reports for a range of dates.	High							
76	The system provides cumulative attendance information for all students in all buildings can be easily accessed and reported.	High							
77	The system provides attendance data that is linked with demographic, general academic, and entry/withdrawal data for each student.	High							
78	The system maintains attendance by building for those students who transfer from one building to	High							
79	The system provides absences to be maintained by building and period for students attending classes in multiple buildings.	High							
80	The system provides the ability for a campus to view student data for students that have been enrolled on that campus but are currently enrolled on another campus. Also provides for the current enrolled campus to view student attendance on the student's prior enrolled campuses.	High							
81	The system supports different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the authorized user to define start and end times for periods by school calendars.	High							
82	The system calculates average daily membership and daily attendance based on the school's accounting period.	High							
83	The system provides ability to process no-show students that were absent on the first day of school.	High							
84	The system maintains an adequate number of district-defined absence codes, controlled at the district level, to meet the needs of the district. (Minimum of 60, plus additional for growth)	High							
85	The system provides for multiple years of attendance data and can be easily viewed and reported on.	High							
86	The system supports daily attendance information to be entered for morning only, afternoon only, or	High							
87	The system supports attendance to be entered for a student by student ID or student name.	High							
88	The system supports attendance to be posted by individual students, predefined groups of students, and by period or course/section.	High							
89	The system supports individual students to be excluded when attendance is entered for a group of students.	High							
90	The user may enter a default absence code when entering absences for a group of students. The default absence code may be overridden for individual students.	High							
91	The system provides the option for the district to grant security to designated personnel to allow them to post absences for future dates.	Medium							
92	The system supports different types of school calendars (i.e., quarters, trimesters, semesters, full year.)	High							
93	The system support half-day calendars with half-day ADA membership.	High							
94	The school calendars automatically interface to the attendance module so that students not scheduled to be in school or in a class are so noted.	High							
95	The system allows school calendar to be altered during the school year (before or after the fact)	High							
96	The system supports attendance that is fully integrated with scheduling changes and class rosters automatically reflect adds and drops	High							
97	The system supports attendance that is compatible to all forms of schedules at the secondary level.	High							
98	The system provides attendance information that is fully integrated to enrollment, withdrawal and Average Daily Attendance status.	High							
99	The system provides attendance information that is fully integrated to grade reporting.	High							
100	The system provides attendance information that is integrated to special programs contact hours.	High							
101	The system provides school calendars that are saved for prior years and the system allows for maintaining calendars for current and future year.	High							
102	The system allows school calendars to be copied to other buildings.	Medium							

103	The system provides attendance totals that are automatically calculated by the system at any time specified by the district.	Medium							
104	The system allows accumulated absence totals for each student by								
105	The system allows accumulated absence totals for each student by Days Enrolled	High							
106	The system allows accumulated absence totals for each student by Days in Membership	High							
107	The system allows accumulated absence totals for each student by Days in attendance	High							
108	The system allows accumulated absence totals for each student by Total absences	High							
109	The system allows accumulated absence totals for each student by Excused absences	High							
110	The system allows accumulated absence totals for each student by Unexcused absences	High							
111	The system allows accumulated absence totals for each student by Total tardies	High							
112	The system allows accumulated absence totals for each student by Unexcused tardies	High							
113	The system allows accumulated absence totals for each student by Excused tardies	High							
114	The system allows accumulated absence totals for each student by Number of home bound days	High							
115	The system allows accumulated absence totals for each student by Total Days Absent	High							
116	The system allows accumulated absence totals for each student by Total Days Present	High							
117	The system allows accumulated absence totals for each student by Attendance Percent	High							
118	The system allows accumulated absence totals for each student by Average Daily Attendance	High							
119	The system allows accumulated absence totals for each student by Average Daily Membership	High							
120	The system allows for separate absence entries by the teacher and by the office staff, so that if an office entry is made, it will override the teacher entry.	High							
121	The system fully integrates office and classroom attendance.	High							
122	The system provides real-time entry, update and viewing of attendance between the office and the classroom.	High							
123	The system includes the capability to display a whole month or year of attendance for a student and then edit attendance on that screen.	High							
124	The system provides desktop reporting for attendance information.	High							
125	The system allows the district the option to allow pre-approved or Office absences to be stored.	High							
126	The system provides the option, when allowing pre-approved absences, for the teacher to be able to override with notification to the office when the student is actually present.	High							
127	The system allows the teacher to enter absences and tardiness from a classroom workstation.	High							
128	The teacher is able to enter attendance and note absences and tardiness from a mobile device.	High							
129	The system provides for student pictures to be displayed when the teacher is taking attendance, if the teacher prefers that method.	High							
130	Class birthday lists are provided to teachers on-screen.	Medium							
131	The system allows the office attendance clerk with proper security to access and modify student attendance history. The history includes the reason codes for the absences	High							
132	The system allows the teacher to view, but not update, student attendance history for the entire school year.	High							
133	The system provides a Missing Submission report listing classes or homerooms where attendance has not been taken.	High							
134	The system sends a clear alert/notification to teachers who have forgotten to enter attendance for the class. System should provide for different types of notifications, not just e-mail.	High							
135	The system provides a submission tracking system to enable office to determine which teachers have not completed attendance entry.	High							
136	The system optionally allows attendance codes to be restricted from use by teachers.	High							
137	System should enable counselors to enter absence reasons within their building e.g. student is with counselor for some reason and is missing class.	Medium							

138	The system provides the ability to restrict teachers from changing attendance entered by the office.	High							
139	The system allows teachers to be optionally restricted from entering attendance after a deadline for each class period.	Medium							
140	The system allows related absence codes to be aggregated into groups for reporting purposes (for example, you can group all illness-related absences with Excused Absences).	High							
141	The system optionally provides blank attendance registers for manual collection of attendance data.	High							
142	On a block day when classes are multiple periods, the system allows the teachers to enter an absence for the first period that carries to the other periods, but give them the ability to alter the absence for the later periods in the block if a student returns to class. Absence should be tracked by minutes within each period to enable accurate tracking of the scope of absences in a period.	High							
143	The system allows the district an adequate number of attendance exceptions reporting and alert thresholds for total or consecutive absences or tardies by code type and date range to meet the state requirements.	High							
144	The system supports and maintains the number of school district-defined attendance letters to meet state requirements.	High							
145	The system provides the ability to track attendance review committee decisions.	Low							
146	The system provides a class roster with seating chart and pictures.	High							
147	The system supports attendance that is compatible to all forms of schedules at the elementary level.	High							
148	The system optionally supports suspension codes from Discipline that automatically update student attendance for the proper date range.	High							
149	The system provides a report on absence statistics by student and by school.	High							
150	The system provides ability to track court warnings and court dates.	High							
151	The system provides the ability to support monitoring of truancy at the district level.	High							
152	The system provides the ability to support monitoring of truancy proceedings at the district level.	High							
153	The system supports district-wide attendance entry - when a full day absence is entered at the home school, the absence should carry over to other schools that the student attends on the day.	High							
154	The system provides a truancy report based on the district's definition of truancy.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
1	The system provides district-wide creation and dissemination of course catalog information.	High						
2	The system provides for user designation of "look-up" fields (and definition of their corresponding values) in the course catalog record.	High						
3	The system provides user defined fields for the tracking of additional information about course catalog records (Higher Education College Board designations, NCAA, etc.).	High						
4	The system provides for district-wide maintenance of course catalog information.	High						
5	The system provides for school ownership of course catalog elements relating to scheduling and assignment of credit values.	High						
6	The course catalog system provides for the association of course catalog records to GPA calculation definitions.	High						
7	The system provides for the association of course catalog records to graduation requirement and career planning definitions.	High						
8	The system provides for the association of course catalog records to state course codes and titles.	High						
9	The system provides for the transfer of student academic history information to higher education institutions through the cross referencing of the course catalog to national standards definitions.	High						
10	The system allows assignment of a district course code.	High						
11	The system allows for the entry of a district course title (short text).	High						
12	The system allows for the entry of a district course description.	High						
13	The system allows assignment of a course classification of instructional programs (CIP) code and description (needed for P210 Voc reporting).	High						
14	The system allows assignment of a course United States Department of Education Cluster code and description (needed for Career and Technical Education reporting).	High						
15	The system includes a course Articulated Tech Prep Status indicator (yes or blank, for P210 Voc reporting).	High						
16	The system allows for grouping of CTE courses by selected CIP codes for purposes of identifying students who are vocational completers.	High						
17	The system allows assignment of a district course curriculum code.	High						
18	The system allows assignment of a course curriculum subject area code (e.g. music or art within fine arts).	High						
19	The system allows assignment of a course type code (e.g., independent study, advanced placement, basic, honors, limited English, regular, special education).	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
20	The system allows assignment of a course source code (e.g., city campus, other out-of-district, running start, district, waived, etc.).	High						
21	The system allows for assignment of a course status code and date (active, archival, etc.).	High						
22	The system allows for indicating what grade level of students typically take this course.	High						
23	The system provides for the designation of whether attendance may be taken for a course.	High						
24	The system provides for the designation of whether academic marks may be assigned for a course.	High						
25	The system provides for the designation of whether academic marks will be posted to course history for a course.	High						
26	The system provides for the designation of whether a course appears in student transcripts.	High						
27	The system provides for the designation of whether a course is to be included in the students high school list of courses.	High						
28	The system allows entry of the average minutes per week of instruction for the course.	High						
29	The system allows for entry of a course designator which becomes attached to the student transcript.	High						
30	The system provides the ability to associate a course with special programs.	High						
31	The system provides scheduling routines must be available to address the needs of elementary, middle and high schools.	High						
32	The system supports multiple course formats including 6 week, 7 week, 9 week (quarter), 12 week (trimester), 18 week (semester), 36 week (full year), alternating day and block courses that can "explode" into multiple courses. In addition, The system allows for the mixing of any of the above combinations.	High						
33	The system has the ability to determine the current semester codes and day of cycle for any given calendar date.	High						
34	The system is capable of handling rotating block scheduling as well as traditional scheduling methods.	High						
35	The system defines a course with a code and description. Each course must be related to a department. Information must be readily available that shows the course, its credits and if the course is required for graduation.	High						
36	The system allows for alternate requests. There is an easy method to view the number of times a certain course was requested as a primary and an alternate.	High						
37	The system allows each course and section to be able to meet in multiple periods throughout the day, up to 99 periods in a day.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
38	The system allows for each course section to have grade restrictions specified.	High						
39	The system allows for course sections to be able to be defined as being offered in a different school/location than the Student's home school.	High						
40	On-line requests are different from adding courses. After adding the course requests for a student, The system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	High						
41	When requesting a course, the system allows for a student to request a class whether or not a teacher has been assigned to the class.	High						
42	The system allows a method to lock in specific course sections into the students schedule and allows the other requests to be scheduled around that course.	High						
43	On rare occasions, students may not be able to have courses in certain periods during the day. The system has the ability to accommodate that student during the request process.	High						
44	The system allows for study hall routines that will place students into study hall sections automatically.	Medium						
45	At the middle and elementary schools, administrators often desire to provide heterogeneous or homogeneous scheduling. The system has the ability to group students by criteria such as band, gifted and talented, test scores, etc. and relate these groups to courses.	Medium						
46	The system provides mass input routines to change schedules and course requests must be available by grade, gender, team, homeroom and individual students.	High						
47	During an add, delete or drop/add process the system provides each school with the option to track the reason for the transaction(s).	Medium						
48	When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department and semester code. Moreover, the system should help the school personnel in deciding the courses that fit the student's schedule.	High						
49	When doing schedule changes, the system provides the school personnel with on-line information as to the number of available seats. The system should allow for overrides and entering conflicts but provide warning messages when this occurs.	High						
50	The actual scheduling routine balances by class section.	High						
51	The scheduling program accounts for a student's degree of difficulty, course priorities and student priorities. Once a scheduling run has been completed, the system has the ability to save the complete students and then work with the incomplete students only.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
52	The system has a program that builds the master class offering and then is used to do the actual scheduling. The system allows a school to define teacher restrictions, room restrictions, and class availability.	High						
53	After the master is created, the system provides the school with the option to rollover the information as a starting point for the upcoming year.	High						
54	The system provides a report and view of a Master class list.	High						
55	The system provides a report and view of a Course request list by course or by student.	High						
56	The system provides a report and view of Request tallies.	High						
57	The system provides a report and view of Room usage.	High						
58	The system provides a report and view of Teacher usage.	High						
59	The system provides a report and view of Period or class load analysis, including doubletons.	High						
60	The system provides a report and view of Singleton courses in conflict.	High						
61	The system provides a report and view of Singleton courses in conflict by student.	High						
62	The system provides a report and view of Student requests in either a list or matrix format.	High						
63	The system provides a report and view of Student schedules.	High						
64	The system provides a report and view of Teacher schedules.	High						
65	The system provides a report and view of scheduling conflicts.	High						
66	The system provides a report and view of Unscheduled students list or matrix.	High						
67	The system provides a report and view of Class lists.	High						
68	The system provides a report and view of Class distribution.	High						
69	The system provides a report and view of Room and teacher availability.	High						
70	The system provides a report and view of Study hall class lists.	High						
71	The system provides a report and view of Drop/Add information.	High						
72	The system provides a report and view of Incomplete student schedules.	High						
73	The system provides a report and view of Students with too many courses.	High						
74	The system provides a report and view of Number of seats open by hours/periods and seats/by grade.	High						
75	The system provides a report and view of Rooms-by teacher, by room, by hour.	High						
76	In the drop/add reports, the information is available by: the person that entered the schedule change, the teacher, the student and the counselor. The report log includes the reason, time and date of the change.	High						
77	The system provides an incomplete student schedule report and includes the open periods in a student's schedule.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
78	The system generates a Conflict report that allows refining a master schedule by listing courses scheduled at the same time.	High						
79	The system provides a fully automated scheduling system (scheduling rooms, courses, teacher, and aides).	High						
80	The system allows students to be scheduled selectively by grade, gender, name, or a set priority.	High						
81	The scheduling process has gender balance with the ability to query by course by gender.	High						
82	The system provides Course sections with the ability to restrict by gender.	High						
83	The system has the ability to prioritize students for scheduling based upon a random algorithm. The system should not prioritize students according to name or ID.	High						
84	The system has the ability to link semester one and semester two of a course so scheduling priority is given to the same teacher and same period. Also, The system has the ability to schedule unrelated one-semester courses in different semesters.	High						
85	The system has the ability to schedule singletons and priority courses first during the scheduling process.	High						
86	The system supports the scheduling of students in groups or blocks of courses.	High						
87	The system supports scheduling of sequenced, co-requisite and pre-requisite, anti-requisites, schedule before, schedule after, schedule opposite classes. The system includes auto-checks for pre-requisites before allowing a course to be added to a student's schedule, as well as auto-checks to see if a student has already taken and passed the course	High						
88	The system supports scheduling utilizing classes of variable sizes.	High						
89	Classroom maximum seating is enforced by the system with the ability to override.	High						
90	The system provides the ability to override maximum class enrollment for authorized users.	High						
91	The system allows the ability to schedule courses offered less than five days per week.	High						
92	The system provides the ability to schedule single or multiple semester classes.	High						
93	The system supports locking a scheduling run and preventing it from being deleted or modified.	High						
94	The system provides for mass scheduling of students as well as individual student scheduling. The system provides for walk-in student scheduler for students enrolling after the start of the school year. After adding the course requests for a student, the system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
95	The system allows a mix of automated student scheduling and manual input.	High						
96	The system provides the ability to schedule sub-groups of students (e.g., juniors).	High						
97	The system allows course request alternates. Alternates can be automatically scheduled if requested courses are full. This must be based on graduation requirement category.	High						
98	The system allows courses to be assigned to a Department and House / Team. The system also allows the students to be scheduled by the House/Team.	High						
99	The system provides the ability to set a course priority for scheduling purposes.	High						
100	The system provides the ability to mass load, mass update, mass replace, and mass delete course requests.	High						
101	The system has the ability for students to be scheduled automatically from course requests any time during the school year.	High						
102	The system allows students to enroll in courses in district schools other than the school that the student is currently registered in. The system allows for cross-enrollment flexibility with the ability to track a student and all associated data regardless of where they are enrolled. The system provides clear indication of cross-enrollment status.	High						
103	The system allows the user to perform “what-if” analysis by running the master schedule builder multiple times, simulating the student requests into these schedules changing parameters each time. The system saves each master schedule and allow the user to choose which one to use as the master. The system provides the ability to easily compare different scenarios.	High						
104	Once the final scheduling run has been approved, The system allows the previous “what-if” versions to be purged.	Medium						
105	The system identifies potential conflicts by identifying a group of students requesting two or more of the same courses (i.e. if many students request both Orchestra and Honors Math. The system warns the user that there is a potential conflict with these two courses). The system has the ability to compare conflicts of a mass of students or individuals.	High						
106	The system provides a conflict matrix of each student with irresolvable conflicts, indicating all courses selected and corresponding master schedule class possibilities, and flagging master schedule classes that are filled.	High						
107	The system allows mass updating of the course catalog and master schedule.	High						
108	The system provides the ability to mass update and move students from one scheduled course into another.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
109	The system allows the prioritizing of individual students for scheduling and the flexibility of scheduling by building.	High						
110	The system provides the ability to print a room usage report, which lists the courses meeting in the room, the course code and description, meet schedule, seats used, and whether the course-section is full.	High						
111	The system provides a user-friendly means (e.g. one screen, one step) of entering course requests, modeling a schedule, and enrolling a student in a modeled schedule.	High						
112	The system has the ability for grades and assignments to be copied from a course that is dropped to one that is added.	High						
113	The Re-Enter Student/Re-Activate Schedule reactivates students withdrawn with the previous option. It re-enters the student in Demographics and makes them active, and re-adds all the saved courses, if class size allows.	High						
114	The system scheduling capabilities have no fixed limits for the number of periods per day or for the number of grading periods per year.	High						
115	The system supports multiple "time period" (aka bell) schedules.	High						
116	The system provides the functionality to handle multiple time schedules within the same building and multiple teams within a time schedule in a building.	High						
117	The system provides the ability to automatically assign students to a team based on a course selection.	High						
118	The system allows on-line schedule changes. Also, schedules are capable of being generated and printed immediately.	High						
119	The system has the ability to generate hall passes on demand based on the students schedule.	Medium						
120	The system allows the school to use the current year master schedule as a starting point for next year's master schedule.	High						
121	The system supports flexibility in the design of the students' schedules.	High						
122	The system supports scheduling of sequenced, co-requisite and pre-requisite classes. The system checks for course prerequisites before scheduling students. The prerequisites can be entered centrally in the course catalog.	High						
123	The system shall check that minimum criteria (i.e. passing grade) for pre-requisite course are fulfilled before allowing enrollment to dependent course.	High						
124	The system produces a warning message when the user attempts to request a course for a student that the student is currently taking.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
125	The system allows the user with the proper security to freeze (close) certain sections or courses during the scheduling process.	High						
126	The system provides mechanism to increase the likelihood that a section will fill (increase its priority).	High						
127	The system allows a report to be requested that lists the individual students' course requests and alternates, if any.	High						
128	The system provides an Alternate Course which identifies the course to substitute if the Student Scheduler is unable to schedule the primary request.	High						
129	The system has an option to allow alternate course requests only for elective courses.	High						
130	The system supports a building-specific course catalog (Name, description, state course id and name, subject/department, campus availability, fees, credits, pass/fail indicator, active/inactive course indicator, semesters or marking periods the course is offered, textbook title assigned to course, etc.).	High						
131	The system allows the authorized user to copy the course catalog from one year to another before editing.	High						
132	The system maintains courses from other institutions for transcript credit for transferring students.	Medium						
133	The system supports definition of required and elective courses.	High						
134	The system allows for a course to be inactive in the course catalog, without deleting the course.	High						
135	The system provides the ability to define a Block or Super Course that groups a number of courses for scheduling purposes.	High						
136	The system supports a mix of standard and blocked classes within the same schedule.	High						
137	The system supports all manner of traditional and non-traditional schedules including block, modified block, teaming, mosaic, and rotating schedules.	High						
138	The system has the ability to facilitate scheduling for teams or family style teaching. (Students from the same team receive teaching from the same group of teachers for core classes. For electives, students are able to receive teaching from non-team teachers.)	High						
139	The system has the ability to assign teachers to teams for family style teaching. If teachers are assigned to a team, the system is able to recognize the team and to give the teachers in that team a common prep period for planning purposes.	High						
140	The system has the ability to assign multiple teachers to a class for team teaching options	High						
141	The system provides the option for elementary scheduling (automated or manual).	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
142	The system supports developing a departmentalized Elementary schedule by homeroom, student group, or individual students.	High						
143	The system supports Elementary self-contained classes and departmentalized classes by grade level with each school.	High						
144	The system provides the option for homeroom assignments (mass or individual).	High						
145	The system provides the option to assign classes by homeroom assignment.	High						
146	The system allows assignment of multiple teachers or paraprofessionals for Elementary scheduling.	High						
147	The system allows mass assignment of counselors.	High						
148	The system allows individual course request entry as well as for a group of students or by grade.	High						
149	The system has an option to not allow or to warn counselor when a duplicate course request is entered.	High						
150	The system allows user with the proper security to easily and quickly replace a teacher with another. This includes movement of all teacher information, e.g. grade book.	High						
151	The system allows the withdrawal of a student, releasing their seat while preserving the students' schedule.	High						
152	The system provides separate schedules for current and next year scheduling.	High						
153	The system scheduling routine balances class enrollments by class section, so that a particular section of a class does not have a larger number of students than another section.	High						
154	The system has the ability to quickly add courses to a student's existing schedule or to drop courses from a student's schedule. When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department, etc. Moreover, the system helps the school personnel in deciding the courses that fit the student's schedule.	High						
155	The system provides a current enrollment summary of each course and section. The user is able to view or generate a printed report containing this summary information.	High						
156	The system provides online tally report to show the total number of course requests for each course updated real-time. The system provides drill-down capability from the tally into the students requesting each course. Also The system provides a hard-copy report of the simple tally by course number at each school, also by grade and gender.	High						
157	The system provides a free period analysis report, which summarizes the number of students who have a specific period free.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
158	The system provides a free time detail report, which shows the open periods in the student's schedule, per cycle day and grading period.	Medium						
159	Once a scheduling run has been completed, the system saves the completed students and then work with the incomplete students.	High						
160	The system provides schedule exception reports for students with under/over scheduled, open periods, taking courses already passed on transcript, etc.	High						
161	The system provides online, real-time access to various reports to assist with scheduling students, such as listing the catalog, master schedule, class lists, class roster, incomplete student schedules, room and teacher availability, etc., sorted by any field on the report.	High						
162	During the scheduling process, the system has a shuffle option that can be utilized. The shuffle option shuffles students from one section to another or reschedule students to improve the overall scheduling rate. The system allows for the option to not touch student who have been fully scheduled.	High						
163	The system allows for the addition of new courses and sections at any time during the school year.	High						
164	The system provides a "Teacher's Schedule" report that presents teachers' schedules in a list or grid format.	High						
165	The system has the ability to print schedules sorted by distributing period and date, by homeroom teacher, for future or current schedules.	High						
166	The system provides a "Seat Availability" report which lists requests and seat counts, including total seats, seats needed and seats available, for each course.	High						
167	The system provides scheduling performance statistics, including number and percentage of requests scheduled and students scheduled.	High						
168	The system provides class transfer history log indicating all changes by date.	High						
169	The system allows a school to define teacher restrictions, room restrictions, and class availability.	High						
170	The system has the ability to automatically make a first attempt at balancing classes based on gender, ethnicity, language, IEP, 504, new students, gifted students, etc. allowing user specification of the fields used to determine balancing.	High						
171	The system shall alert for ESOL and foreign exchange students, new students, etc.	High						
172	The system allows students to be pre-scheduled into a course-section before the scheduling algorithm is run.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
173	The system allows multiple meeting time sessions per course in the Master Schedule, allowing efficient scheduling of lab courses, double meeting time courses, and courses with split meeting times.	High						
174	The system allows combined class scheduling to allow multiple classes to be taught by the same teacher in the same period and room.	High						
175	The system has the ability to automatically remove the student from all of his/her scheduled classes and reduce the class sizes.	High						
176	The system supports alternate day bell schedules to accommodate early release days, testing days, or other district-defined calendar.	High						
177	The system automatically calculates Career Tech Hours based on the student's schedule.	High						
178	The system provides the ability to track a student's career or multi-year schedule plan and automatically update that plan as the student moves from year to year. The system allows the student/parent to update through the parent/student portal.	High						
179	The system should allow the ability to mass load student requests based on the students career or multiyear plan.	High						
180	The system produces a personalized list of suggested course election for a student based on the course offerings, student's graduation requirements, student's special needs (e.g. Individual Education Plan, Bilingual/ESL etc.), credits earned on the student's transcript, and student's current schedule. The suggested course election lists only those courses available to the individual student. For areas where the student can choose between multiple courses, each course is listed.	Medium						
181	The system provides an alert and report of students who didn't get a class that is necessary to meet graduation requirements.	High						
182	The system allows the user to define special room needs by course and teacher.	Medium						
183	The system allows for manually closing a section so that no students can be scheduled into that section.	High						
184	The system provides an easy method to view the number of times a certain course was requested as a primary and an alternate.	High						
185	The system provides a tally and report number of alternates substituted according to the primary course and the alternate course.	Medium						
186	The system allows the definition of required courses by student program, grade level, and graduation path.	Medium						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
187	The system allows scheduling for elementary school needs including selection, sorting and assignment by Grade level	High						
188	The system allows scheduling for elementary school needs including selection, sorting and assignment by Gender.	High						
189	The system allows scheduling for elementary school needs including selection, sorting and assignment by Ethnicity.	Low						
190	The system allows scheduling for elementary school needs including selection, sorting and assignment by Home Language.	Medium						
191	The system allows scheduling for elementary school needs including selection, sorting and assignment by District-defined Placement Classification.	High						
192	The system allows scheduling for elementary school needs including selection, sorting and assignment by Homeroom.	High						
193	The system allows scheduling for elementary school needs including selection, sorting and assignment by Core subjects.	High						
194	The system allows scheduling for elementary school needs including selection, sorting and assignment by Specialty and Pull-out classes.	High						
195	The system allows scheduling for elementary school needs including selection, sorting and assignment by Resource classes.	High						
196	The system supports the ability to track course prerequisites over multiple years.	High						
197	The system provides a secure web-site for entry of student course requests.	High						
198	The system provides a method for counselors to enter student requests on-line with a student.	High						
199	The system provides the ability to run the scheduler selectively by semester as an option.	High						
200	The system warns of Special Ed status when schedule changes are made for special Ed students.	High						
201	Special Ed courses are limited to Special Ed students. The system has the ability when entering course requests but can be overridden.	High						
202	The system provides the option to enter text describing the courses offered, which may be compiled and printed to serve as a course selection booklet.	High						
203	The system provides as an on-line interactive conflict matrix without printing a report. The system allows the user to drill down into the count to see the names and id numbers of students requesting the conflicting courses.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
204	The system has an interactive conflict matrix that allows one click lookup of individual students requesting each pair of courses.	High						
205	The system provides as individual student timetable grid with on-line feedback of class options and restrictions.	Medium						
206	The system allows course Fees to be tracked in the course catalog. These fees "pop up" as required during scheduling.	High						
207	The system indicates those classes which require a fee when the class is requested by the student, or entered by the counselor.	High						
208	The system provides the ability to track a teacher's Highly Qualified Teacher status and alert the scheduler when an unqualified teacher is assigned to teach a class.	High						
209	The system allows the user to define teacher qualifications and preferences to be used in scheduling.	High						
210	The system tracks the Teacher Certification number.	High						
211	The system has the ability to see open classrooms information for each period online (i.e. classrooms unoccupied, number of seats open in each period, etc.)	Medium						
212	The system has the ability to create teacher notifications that indicate both the old and the new course and section assignments when changing a course on a student schedule (changes report/email sent to teacher). This is be used to notify both affected teachers to help ensure that the student goes to the new class for which he has been scheduled.	High						
213	The system has the ability to make available the schedule for the transfer student in the former school online for the new school to refer to when preparing the student's schedule in the new school.	Low						
214	Student schedule changes are automatically reflected in teacher's grade book.	High						
215	The system has the ability to assign text books to courses in the master schedule (i.e., title of text adopted for course).	Low						
216	The system provides an on-line, interactive Master Schedule Builder program that builds the master class offering which are then used to do the actual student scheduling. Each school is allowed to define teacher restrictions, room restrictions and class availability.	High						
217	The Master Schedule Builder optimizes the placement of course-sections based on the student course requests and the school-defined restrictions to automatically assign courses into class periods.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
218	The system allows the authorized campus user to perform “what-if” analysis by running the master schedule builder multiple times, changing parameters each time. The system saves each master schedule and allows the user to choose which one to use as the master.	High						
219	The system supports the scheduling of courses of varying lengths such as full year, semester, trimester, and 9-week, grading period, and/or wheel courses.	High						
220	The system allows schools to load teachers and classrooms as resources and also, as an option, allow teachers and classrooms to be assigned to courses.	High						
221	The system has the ability for miscellaneous resources to be set up into groups, such as departments, which allows for greater flexibility when scheduling courses.	Medium						
222	The system automatically calculates how many sections of a course are required by comparing the number of student requests for a course with the maximum number of students allowed in the specified course, but allows user to override.	High						
223	The system allows courses to be scheduled in combinations, by specifying that certain courses must be scheduled during the same period, in the same room, and with the same teacher.	High						
224	The system provides reports to assist in determining any errors or questionable areas that need user intervention.	High						
225	The system allows course information can be copied from one year to the next.	High						
226	The system provides a ability to secure the teacher social security number so that it can only be seen by users with the proper security.	High						
227	The system has the ability to specify valid periods by courses or by section if applicable. Some periods defined in the system are only valid with certain courses. The system allows the user to note what periods are valid with each course or section. If no values are assigned, the system assumes that the course could be taught during any period.	High						
228	The system allows classes to meet non-consecutive periods (i.e.: first and third period, A-day and B-day).	High						
229	The system provides a utilization reports for teacher, room, or course.	High						
230	The system should allow the user to define on a teacher-by-teacher basis how many classes each teacher can teach.	High						
231	The system allows the user to build some of the sections or courses into the master schedule prior to building the rest of the master schedule. (i.e., in some cases, the user may know up front that a certain section of a course must be taught at a certain time of the day.)	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
232	The system allows assignment of teacher planning periods or other district-defined reservation labels before, during, and after scheduling.	High						
233	The system provides a the ability to inactivate a course by school year without deleting the course.	High						
234	The system provides a the ability to activate course by school year.	High						
235	The system has the ability to track instructional staff (ID, social security number, name, initials/short name, buildings, team, department, homeroom, teacher load, email address, etc.)	High						
236	The system provides the ability to assign a minimum of 4 staff members to a class with a staff role of each staff assigned.	High						
237	The system has the ability for, as an option, teachers to be automatically loaded against sections based on qualifications or user-defined selection.	High						
238	The system provides as for assigning individual students a scheduling priority.	High						
239	The system has the ability to identify which teachers are CTE (voc ed) teachers in current school year, including current license status and expiration.	High						
240	The system has the ability to report on percentage of CTE student participation as defined by Northshore SD for current and past years to qualify for Perkins Reserve Grant.	High						
241	The system provides a report that shows a graphic of master schedule--teacher, room, hour, course, section #. This includes highlighting classes that are full.	High						
242	The system moves the assignments with grades achieved on those assignments to a new class when the teacher is the same teacher for both classes.	High						
243	The system has an option to either track students or NOT track students as needed.	Medium						
244	The system has the capability to identify students who need to be separated when scheduling and maintain this separation for all classes.	High						
245	During the creation of the master schedule, the system allows the locking of specials (art, PE, music) into the students' schedules and the flexibility to change the core classes.	High						
246	The system allows administrators/counselors to easily view and print student's missing assignments and progress reports.	High						
247	The overall menuing system has simplicity and ease of finding information. It incorporates the use of "favorites."	High						
248	The system has the ability for teachers to have access to information such as counselor's observations, students' IEP and 504 plans with user defined restrictions.	High						
249	The system displays all information for a specific student on one screen.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Scheduling Requirements	Priority	Y	C	M	F	3	N
250	The system has the capability to link specific classes so that they will have the same teacher for both classes such as Communication Arts and Reading without tracking the students.	High						
251	The system has the capability to easily re-schedule a specific course, grade or school after the system has rolled over to the next year.	High						
252	The system has the capability to lock in schedules for specific groups of students (such as SPED) while modifying other students schedules during the scheduling process.	High						
253	The system allows "drag and drop" scheduling when creating the master schedule.	High						
254	The system has the ability to print D and F list from teacher gradebook in real-time on a daily basis.	High						
255	The system has the ability for Scheduler awareness of student requests or scheduled classes in other buildings and schedule around them.	High						
256	The system has the ability to schedule virtual classes without a period.	High						
257	The system has the ability to have a group of students and teacher flow in a class from year to years. (e.g. advisory class students have the same teacher all 4 years) AKA "cohort scheduling".	High						
258	The system has the ability for a course to include but not be limited to a course code, category/subject, title, description, course level (remedial, general, special ed, enriched, etc.) a sequence and sequence total (to allow determining if this is for example a 1 of 4 classes), credits possible, credit category by diploma, allowing multiple possible categories, grade level, targeted program(esl, special ed, gifted, migrant, at-risk, general, etc.), delivery type (e.g. virtual, distance learning, general, self-contained multi grade, self-contained single grade), college credit, vocational (approved not funded, approved and funded, exploratory not funded), state course code information, non standard flag, parent portal flag, display on report card, display on transcript, display on student schedule, requires counselor approval, include in GPA flag, honors flag, AP flag.	High						
259	The system has the ability for district defined courses by school level. Each school pulls from district course catalog by school level (HS, MS, ELEM).	High						
260	The system has the ability to create a report of student requests for a certain course (a low enrollment course that is closing and need a list of students who have requested it).	High						
261	The system has the ability to create a report of students by grade, counselor, homeroom, etc. who are missing period x.	High						

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Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
1	The system allows definition of a district-wide grade scale by school mtype (elementary, middle school, junior high and high school).	High						
2	The system supports a grade scale that allows definition of mark symbol (A, A-, etc), grade points, and whether or not the grade earns credit.	High						
3	The system allows modified grading scales by course.	High						
4	The system stores and retains Grade data by school year, so school district personnel can design and generate reports comparing grade information.	High						
5	For keying process, The system provides an easy posting routine for a specific interim period for each class and section. For each class section and student there is a code to identify students as failing, in danger of failing, or passing. A recommendation code as to what the student needs to do for the rest of the marking period is at least a two character code that is also stored in a table format. A projected grade that is validated against the grade reporting table is available for input. There is also be a narrative that can be inputted to explain the reason or actions the student needs to take.	High						
6	The system stores all cumulative credits earned.	High						
7	The system allows the guidance department to track the colleges applied, accepted, and attended. For each, the user needs to enter the appropriate dates.	High						
8	The system allows the guidance department to track scholarships awarded.	Medium						
9	The system provides the ability to keep an audit of Report Card Status. This keeps track of how records are used by the Student Scheduling and Grade Reporting modules. Example: The course is dropped in Scheduling, but remains active in Report Cards, the course is dropped from Scheduling and Report Cards, the report cards information for this course has been copied to another course, etc.	High						
10	The system provides the ability to create a report for Student ID List.	High						
11	The system provides the ability to create a report for Address list.	High						
12	The system provides the ability to create a report for Mailing labels.	High						
13	The system provides the ability to create a report for Student summaries.	High						
14	The system provides the ability to create a report for Grade record label.	High						
15	The system provides the ability to create a report for Activity list.	Medium						
16	The system provides the ability to create a report for College list.	Medium						
17	The system provides the ability to create a report for Scholarship list.	Medium						
18	The system allows notes to be included on report cards on a per school basis.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
19	The system allows the user to map district course equivalents for out of district transfer students.	Medium						
20	The system allows for courses on the student's report card to be sorted by building, course number and section or course description, period of the day, etc., or any combination as selected by the user.	High						
21	The system supports centralized district-wide production of Progress Reports and Report cards. Groups of schools can be processed separately. Mailings can be sorted by zip-code district wide. Each school is also be able to print their own Progress Reports and Report cards.	High						
22	The system allows a variety of marks per marking period as well as final grades to meet the needs of the district.	Medium						
23	The system allows a flag or mark to indicate a student's course is incomplete, withdrawn, or failure.	High						
24	The system provides the ability to automatically calculate letter, numeric, grade point, and credit equivalencies based on official grading tables.	High						
25	The system provides the ability to query students who are below and above a user-specified GPA or grade by single or multiple criteria (e.g., grade level, teacher, subject, alphabetically, D and F lists, etc.).	High						
26	The system provides the ability for each campus to define which of their grades will exclude students from any honor rolls.	High						
27	The system, optionally allows narrative comments to be printed in full text form on progress reports and report cards.	High						
28	The system provides the ability for comments to be automatically personalized using "gender smart" pronouns.	High						
29	The system provides the ability to print multiple district-defined messages on report cards.	High						
30	The system provides the ability to print the promotional status of a student on the report card.	High						
31	The system provides for data entry routines that allow for the entry of grades, comments, class absences (excused, unexcused, and tardy) by marking period, course, and student to occur in one process.	High						
32	The system provides the ability to identify students in danger of retention, or with other risk indicators such as home language other than English.	High						
33	The system provides a printable report that includes student, grades, and credits earned.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
34	The comprehensive system generates not only progress report cards at mid-marking period and on demand, but also on-demand interim period reports.	High						
35	The system's Interim Progress Reporting function supports all grading periods and multiple runs per grading period.	High						
36	The system allows all types of class absences to be shown on progress cards for each course-section for each grading period.	Medium						
37	The system allows users to copy comments from the Report Cards or allow them to enter separate comments for the Progress Report cards.	High						
38	Elementary grading rosters are automatically built based on scheduled homeroom.	High						
39	The system allows authorized users to enter grades for an individual student, for all students in a class, or for all classes taught by a teacher.	High						
40	The system supports all manner of elementary, middle, high school and alternative school grading scenarios.	High						
41	The system allows Pre-K and elementary grading using multi-level subject and curriculum frameworks.	High						
42	The system's Progress Report card feature allows the user to add grades, comments, and optionally absences for students enrolled in a specified course, with the ability to change grades, comments, and absences that have already been entered.	High						
43	The system allows attendance to be automatically transferred to Interim Progress Reporting.	High						
44	The system allows students to take courses in various buildings within the school district and have those courses listed on Progress Report cards printed in their home buildings.	High						
45	The system allows school-wide and grade level messages to be printed each interim period on the Progress Report cards.	High						
46	The system provides a comprehensive set of Interim Progress reports (e.g. the Progress Report Summary Report, the Progress Report Comment Usage Report, etc.).	High						
47	The Progress Report Usage Report contains enough information to be used for auditing purposes or for generating comparative studies of the information.	High						
48	When a course covers multiple subject areas, the system allows credit to be evenly split between areas, full credit to go to all areas, or credit to be allocated on an as needed basis in a defined order of hierarchy.	High						
49	The system identifies repeated courses.	High						
50	The system allows Testing information to be added to the report card.	High						
51	The system allows skills and standards-based grading and assessment.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
52	The system allows district defined standards.	High						
53	The system allows an unlimited number of Identifiers defined by the district. e.g., "Identifies the uppercase letter 'A'".	High						
54	The system allows printing Standards and Identifiers in multiple languages.	High						
55	Standards and Identifiers are assignable to multiple grade levels.	High						
56	The system provides the ability for Students to be automatically assigned the Standards and Identifiers defined for their grade level.	High						
57	The system allows district to define list of valid marks for individual standards.	High						
58	The system has completely configurable report card template capable of printing Standards, Identifiers, traditional grades for scheduled courses, attendance totals and comments.	High						
59	The system allows mastery, proficiency, and observational-based assessment.	High						
60	The system provides the ability to generate a letter to parents when their child is ineligible to participate in sports or other activities because of failing grades.	High						
61	The system provides the ability to generate reports and letters for failing students in order to properly notify and verify with student's parents/guardians.	High						
62	The system allows school level grade distribution analysis reports sorted by teacher and course.	High						
63	The system allows complete district level reporting, analysis, and data mining.	High						
64	The system provides for a grade summary report that includes all the students grades for each marking period along with absences, tardies, GPA's and class ranks for each of those GPA's.	Low						
65	If the solution has modules other than discipline, the district is able to hide the other unused modules from teachers on the website.	High						
66	Authentication through the teacher website is capable of integrating with Active Directory/LDAP.	High						
67	The system provides the ability to prevent (lock down) any teacher grade changes by a specified date.	High						
68	The system provides Cumulative GPA and marking period GPA's displayed by year and by school with GPA, quality points and the credits that were attempted.	High						
69	The system provides the ability to handle alphabetic, numeric or combination grading. Each school may have its own grading scheme; the system provides the flexibility to address the unique needs of each school, controlled at the district level.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
70	The system provides the ability to attach a minimum of 3 comments per course per grading period. There are unlimited comments that are district, building and user-defined.	Medium						
71	The system provides the capability of storing comment descriptions in multiple languages.	Medium						
72	The system shall provide Selected grade list.	High						
73	The system shall provide Grade distribution by class and by teacher report.	High						
74	The system shall provide Grade summary report that includes all the students' grades for each marking period.	High						
75	The system shall provide Honor Roll report - All "A's" in middle school.	High						
76	The system shall provide Grade collection forms for mass processing.	High						
77	The system shall provide Grade verification sheets after the grades have been scanned or keyed in.	High						
78	The system shall provide Report cards that address the secondary and elementary schools.	Medium						
79	The system shall provide Report cards in mail ready format.	High						
80	The system shall provide Class rank reports.	High						
81	The system shall provide Students missing marks/grades for a particular marking period.	Medium						
82	The system shall provide Special awards and Honors (National Merit Scholars, etc.).	High						
83	The system allows user defined letters to be sent at virtually anytime throughout the year. The letter is of a flexible format to include user-defined text, courses, teachers, projected grade, recommended course of action, and the reason for the grade.	High						
84	The system allows for the grades and comments to be keyed in.	Low						
85	The system provides the ability for the school to have separate tables to define the lack of progress codes and/or commendation codes.	High						
86	The system provides data collection forms available for easy data entry.	High						
87	The system provides a status report that lists all the students in danger of failing, failing and/or passing.	High						
88	The system provides detailed reports as desired by teacher and student.	High						
89	The system supports a flexible design of the interim progress and report card formats.	High						
90	The system allows for report card formats that meet the separate needs of elementary and secondary schools.	High						
91	The Report Cards package permits alpha-numeric grades, along with special characters (e.g. pluses and minuses).	High						
92	The system provides Report Cards that can be viewed on screen and printed for individual students, selected students, and in mass.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
93	The system provides Transcripts that be viewed on screen and printed for individual students, selected students, and in mass.	High						
94	The system provides the ability for parents or guardians to view transcripts on Parent Portal and print unofficial transcript.	High						
95	The system allows report cards to be sorted for distribution by allowing the user to select from various fields including building, a designated period of the day, student's name, grade, homeroom, homeroom teacher, zip code, etc., or any combination of the fields.	High						
96	The system supports a variety of marking period configurations.	High						
97	The system supports citizenship/conduct grades for each class and marking period.	High						
98	The system provides the ability to calculate the final grade automatically based on defined weighting of the components used and allows the final grade to be manually entered or overridden with a reason. The system has the ability to view audit trail of changes and activity.	High						
99	The system provides the ability to calculate the semester average automatically. Marking period and exam grades are given the proper weight (e.g. 25% for each of three marking period grades and 25% for the semester exam grade.) This is flexible and district-defined. The system allows the semester average to be manually entered or overridden.	High						
100	The system provides the ability for grade-related information for report cards to be imported/uploaded/posted from other packages, including semester and final grade averages for elementary campuses.	High						
101	The system allows final grades for a course to be computed from two, three, or four semester-long courses. The semester courses may be linked to Northshore SD state course code	High						
102	The system allows grades to be entered by either student or course.	High						
103	The system supports Northshore SD GPA types and provides rule based procedures that allows the district to exclude students for selected GPA calculations. Northshore SD has unique GPA calculations that the system should support. $\text{Weighted GPA} = (\text{number of weighted courses} / (\text{number of semesters} \times 7)) + \text{regular GPA}$	High						
104	The system allows calculation of interim GPA/numerical grade average as defined by Northshore SD. The final grade averages for seniors can be calculated after the end of the 5th marking period. Allow for saving the 5th marking period GPA for seniors.	High						
105	The system supports honor roll and GPA calculations based on any defined mark type such as marking period, semester, exam grade, or on the final grade, as well as cumulative honor roll. The system provides for exclusion of students from any of these calculations based upon district policy.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
106	Report cards can include transcript-like summary of full multi-year grading histories such as total credits earned, accumulative GPA.	High						
107	The system provides the ability for the district to determine, the honor point value of marks; how marks will be used in honor roll, GPA, and credit calculations (both full and partial credit); designate if the mark is a passing mark; and determine whether the mark or value should print on report cards. Different quality points may be awarded based on the type of course (whether a course is a regular course, honors, course, modified curriculum, etc.).	High						
108	The system provides the ability to produce Report cards and grade verification sheets for each grading period.	High						
109	The system supports alpha or numeric teacher comments per student, per course. Comment codes may be printed on the report cards.	High						
110	The system supports attempted credit and earned credit calculations.	High						
111	The system supports unlimited levels of non-weighted and weighted grades, and support district policies for calculating full (or partial credit optional).	High						
112	The system supports copying grades from a dropped course to the added course in one step.	High						
113	The system interfaces with Daily and/or Class Attendance, allowing attendance information to be printed on report cards. Attendance types for Daily and Class Attendance can be printed on the report card per student, per marking period. (e.g. excused, unexcused, tardy).	High						
114	The system supports students taking courses and programs on various campuses within the school district while having report cards printed by any authorized user regardless of building.	High						
115	The system provides for school district-controlled entry and update of student grades and GPA records. The system allows override of grade averages, attempted and earned credits, etc.	High						
116	The system provides missing grades report to determine grades that were not submitted.	High						
117	The system provides for user to report on selected grades such as Incomplete, or failing grades, or any other selected value.	High						
118	The system provides the ability to display all prior grading period report card information for current and prior years.	High						
119	The system allows for changing or correcting a student's mark after a mark reporting period by the authorized user.	High						
120	The system supports calculating and printing of various weighted and un-weighted grading	High						
121	The system provides the ability to notify specified users when classes with fees have been dropped.	High						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)					
#	Grades Requirements	Priority	Y	C	M	F	3	N
122	Application should allow a course to be included on Report Cards but excluded from Transcripts.	High						
123	The system provides automatic calculation for any grade type.	High						
124	The system provides the ability to save a "snap shot" of the class rank and view this information sorted in various orders. Example: By school, rank and school, grade, alpha order with averages, rank in class and official GPA.	High						

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Vendor Comments/ Proposal Section Reference

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Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	
1	The system supports a flexible district-defined transcript format including, but is not limited to, student demographic and academic information, attendance, immunizations, standardized testing information, class rank, schools attended, district and school "transferred from", school's College Board Campus code number, state ID, comments, courses and semester and final grades received, earned credits, grade point averages, grand total credits, attempted credits, grade points and GPA, legend explaining district grade points. Courses can be listed in order by their assigned subject area or department.	High							
2	The system supports the ability to store and track for historical credit information: The course code and course title that was used when the student took the course.	High							
3	The system supports the ability to store and track for historical credit information: Grade level when the student took the course.	High							
4	The system supports the ability to store and track for historical credit information: The date the student completed the course, potentially independent of the end of the term.	High							
5	The system supports the ability to store and track for historical credit information: The letter grade the student received.	High							
6	The system supports the ability to store and track for historical credit information: The credits attempted	High							
7	The system supports the ability to store and track for historical credit information: The credits earned.	High							
8	The system supports the ability to store and track for historical credit information: The name and id number of the teacher.	High							
9	The system supports the ability to store and track for historical credit information: a course designator to identify the type of course.	High							
10	The system supports the ability to store and track for historical credit information: Whether or not the course is a vocational completer.	High							
11	The system supports the ability to store and track for historical credit information: The period the student was in when they took the course.	High							
12	The system supports the ability to store and track for historical credit information: The school that awarded the credit/course.	High							
13	The system supports the ability to store and track for historical credit information: Any Advanced Placement or International Baccalaureate number for the course.	High							
14	The system supports the ability to store and track for historical credit information: The state course code for the course.	High							
15	The system supports the ability to store and track for historical credit information: The grade points the student received as a result of the course and credit.	High							
16	The system provides the ability for each student the guidance department needs to track the colleges applied, accepted and attended. For each, the user enters the appropriate dates.	Medium							
17	The system provides access to and report credits earned/required by curriculum area by grade level for various sets of graduation requirements.	High							
18	The system maintains course history of classes taken in the district.	High							
19	The system maintains a history of credits from night school, summer school, correspondence, college, etc.	High							
20	The system maintains granted equivalent credits on students entering from outside the State/US.	High							
21	The system stores and calculates 2-digit course credits and 3-digit graduation requirements (i.e., 10.00 credits per course and 230 credits to graduate).	High							
22	The system allows for designation of the student's project year of graduation based upon their entry into 9th grade.	High							

23	The system allows for designation of the student's year designator associated with the student's graduation requirements. Typically graduation requirements are set based upon a year of graduation. This field then describes the graduation requirements year for the student.	High							
24	The system tracks the student's actual year of graduation.	High							
25	The system provides for on-line graduation verification.	High							
26	The system produces user-formatted transcripts and permanent records.	High							
27	The system produces transcripts interactively as well as in batch mode.	High							
28	The system provides credits earned, required, and needed by subject area.	High							
29	The system provides for a High School Planner sub-system.	High							
30	The system provides for alternative diploma earned.	High							
31	The system provides a Graduation date.	High							
32	The system provides the ability to keep requests by future grade level for students either by specific student or group of students.	High							
33	The system automatically converts planned future course requests for the coming course and/or by curriculum area.	High							
34	The system allows grade 8 students to create high school plans.	High							
35	The system allows the definition of various target plans by grade level.	High							
36	The system distinguishes between plans relating to high school graduation versus plans that relate to college or other post-high school program admission.	High							
37	The system allows access to scheduling records during the time that scheduling is being done so that counselor can see impact of decisions made during that process on the student's total plan.	High							
38	The system allows the assessment of student plans compared to various target plans and indicate deficiencies.	High							
39	The system produces high school plan reports.	High							
40	The system reports to students and parents on current student progress.	High							
41	The system reports to counselors showing current credit deficiencies by student.	High							
42	The system provides tallies of requests in next years plans to assist in master scheduling building.	High							
43	The system provides the capability to identify the credit earned for each course in the transcript/permanent record.	High							
44	The system provides the capability to place student demographic data in the transcript/permanent record.	High							
45	The system provides the capability to customize the header of the transcript/permanent record when printing.	High							
46	The system provides the capability to place cumulative attendance data in the transcript/permanent record.	High							
47	The system allows the user to place a student's class rank on the transcript/permanent record.	High							
48	The system provides the capability to identify the student's grade level at the time the course was taken, in the transcript/permanent record.	High							
49	The system provides the capability to identify the teacher name for each course in the transcript/permanent record.	High							
50	The system provides the capability to identify the grade earned for each course in the transcript/permanent record.	High							
51	The system provides the capability to identify the course section for each course in the transcript/permanent record.	High							
52	The system provides the capability to identify the course name or abbreviation for each course in the transcript/permanent record.	High							
53	The system provides the capability to identify the course number for each course in the transcript/permanent record.	High							
54	The system provides the capability to sort courses by user-defined course data criteria in the transcript/permanent record.	High							
55	The system provides the capability to sort courses by term as well as by year on the transcript/permanent record.	High							
56	The system provides the capability to sort by subject area (e.g. Math, Science,) in the transcript/permanent record.	High							

57	The system provides the capability to identify total credit earned by subject area in the transcript/permanent record.	High							
58	The system provides the capability to identify total credit earned in the transcript/permanent record.	High							
59	The system provides the capability to identify entry and withdrawal information in the transcript/permanent record.	High							
60	The system allows the user to enter and override a calculated GPA for an individual student on the transcript/permanent record.	High							
61	The system allows the user to enter and override credit awarded for an individual student on the transcript/permanent record.	High							
62	The system allows the user to place any GPAs calculated in the grade reporting module on the transcript/permanent record.	High							
63	The system provides the ability to place multiple grade legends in the transcript/permanent record.	High							
64	The system allows the user to place student-specific honors and awards identified in the activities module, into the transcript/permanent record.	High							
65	The system allows user-defined selections of immunization data to be defined in the transcript/permanent record.	High							
66	The system provides the capability to place general notes or comments in the transcript/permanent record.	High							
67	The system provides the capability to place current grade data and schedule in the transcript/permanent record.	High							
68	The system provides the capability to place the name of the prior school where a course was completed in the transcript/permanent record.	High							
69	The system provides a standard transcript/permanent record which allows user-defined sort features.	High							
70	The system provides the capability to identify the term the course was taken in the transcript/permanent record.	High							
71	The system provides the capability for user-defined selections of standardized test data in the transcript/permanent record.	High							
72	The system provides the capability to export transcript data in an electronic format.	High							
73	The system allows for the storage and reporting of the "Year" which indicates the year the student completed the course.	High							
74	The system provides the ability to create a report for Transcript.	High							
75	The system provides the ability for grade information to be available by year for printing on transcripts.	High							
76	The system allows, optionally, for withdrawn classes to print on the transcript.	High							
77	The system supports the transcript displaying current attempted and cumulative attempted credits, as well as, current earned credits and cumulative earned credits.	High							
78	The system provides system changes in an adequate and timely manner to comply with state-mandated changes and deadlines for any and all areas of grade reporting, transcripts, GPA calculations, ranking, graduation requirements, etc.	High							
79	The system maintains transcript records including grades and credits for courses taken in and out of the district.	High							
80	The system provides the ability for approved personnel to modify grades and transcripts (for an active student. The student's current school is the keeper for the student record and for an inactive student, the student's most recently attended school is the keeper of the student record).	High							
81	The system provides the ability to print comments and user defined fields on the transcript.	High							
82	The system provides the ability for when grade and credit changes are made, the student's GPA is automatically recalculated.	High							
83	The system has the ability to print test cores on student transcripts.	High							
84	The system has the capacity and capability to store all transcripts for an indefinite period of time.	High							
85	The system provides the ability to print electronic transcripts with seal and signature as well as unofficial transcripts.	High							

86	The system provides the ability to print progress reports, report cards, and transcripts on a laser printer with a forms overlay to optionally include a logo.	High							
87	The system supports printing numerous grade point averages on report cards and transcripts, both cumulative and current, weighted and non-weighted.	Low							
88	Cumulative GPA's is displayed and printed on transcripts by year and by school along with quality points and credits earned and attempted.	High							
89	The system provides the ability for grades to automatically post to student historical and transcript files.	High							
90	The system identifies courses taken during the summer sessions. Summer school courses are flagged on the transcript.	High							
91	The system provides the ability to track the teachers associated with each course in transcript course history.	High							
92	The system, optionally prints transcript by department instead of school year.	High							
93	The system provides the ability to view and print unofficial middle school transcript.	High							
94	The system provides easy access to all prior years grades, interim marks and assessment data.	High							
95	The system provides attendance information for each year with the information containing the school, marking period, grade level, and the total excused and unexcused absences.	High							
96	The system provides grade information by year, by school attended and for each marking period displays the course section, grade, earned credits, comment code and if credits were adjusted and why.	High							
97	The system provides the ability to calculate multiple grade point averages and store a minimum of 9 in the student's record for each individual marking period and semester and for a cumulative total.	High							
98	The system provides the ability to calculate the final grade automatically. Marking period and final grades must give the proper weight (e.g., final exam 20%, each of the four marking periods 20%). This must be very flexible and user-defined.	High							
99	The system provides the class rank to be tracked for each cumulative GPA stored.	High							
100	For each student, the system provides the ability for a user to be able to view the student's courses, grades, GPAs, and comments in a list form in report card style format.	High							
101	The system provides the ability for student GPAs, grades etc. to be viewed on the parent portal and be able to be printed in a report card format.	High							
102	For each student, the system provides the ability to easily change and identify a student's credits attempted for a specific class if different than the normal credits.	Medium							
103	The system provides for data entry routines that allow for the entry of grades, comments, class absences, and class tardies by marking period, course and student to occur in one process.	High							
104	In cases when a course is composed of a series of other courses, the system allows for the individual course to be correctly recorded for report cards and all other grade reporting reports.	High							
105	The system supports the ability to scan historical transcripts, creating a key of student number and name, and provide the ability to reproduce a historical transcript.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Graduation Requirements	Priority	Y	C	M	F	3	N	
1	The system tracks Graduation Requirements Year for each student.	High							
2	The student's graduation Requirement years links to a set of Graduation Requirements.	High							
3	These Graduation Requirements consist of credits for courses, assessments, and other non-course related requirements.	High							
4	The system will display whether or not a student meets the Graduation Requirement as defined for their Graduation Requirements Year.	High							
5	The process that determines a student's status towards Graduation Requirements uses a best-fit algorithm to determine which course to apply towards which requirement.	High							
6	The system tracks a Project Graduation Year for each student.	High							
7	The system tracks whether a student has graduated.	High							
8	The system allows for a particular Graduation Requirement to be waived for a select student.	High							
9	The system track multiple graduation plans for a student and identify deficiencies in each one.	High							
10	The system supports a district-defined Graduation Requirement code that identifies which set of requirements this student must fulfill to graduate.	High							
11	The system stores and calculates 2-digit course credits and 3-digit graduation requirements (i.e., 10.00 credits per course and 230 credits to graduate).	High							
12	The system has the ability for graduation status to be determined based on course requests for the upcoming school year(s).	High							
13	The system has the ability for current classes to be included or excluded when computing the number of credits earned.	High							
14	The system has the ability to analyze a student's course history based on different graduation rules/requirements.	High							
15	The system allows credits earned in a course to be automatically applied to a defined alternate area of study when all credit requirements for the primary area of study have been met.	High							
16	The system has the ability to assess students based on marks other than letter grades.	High							
17	Graduation verification can be performed on-line for individual students.	High							
18	The system has the ability to display and print a student's progress towards graduation, including the number of credits required, earned and needed in each area of study.	High							
19	The system provides a batch process for both individual students as well as selected groups of students.	High							
20	The system has the ability for individual users to include or exclude course history information from the on-line graduation verification display as well as from the batch report output.	High							
21	The graduation verification process can assess student graduation plans, compare them to various Graduation Rules, and indicate deficiencies.	High							
22	The system allows graduation requirements to be met in middle school. They can be included in the definition of Graduation Rules and considered when assessing a student's progress toward graduation.	High							
23	The system has the ability to automatically create course requests for all requirements not yet met, based on a student's graduation plan.	High							
24	The system provides a list of graduation requirements for each student that may be sorted alphabetically or by grade level.	High							
25	The system provides a list of students that includes credits required, earned and needed by area of study for selected grade levels, graduation requirements, etc.	High							
26	The system provides a list of students who will not graduate that includes a complete list of the graduation requirements each student has not met.	High							
27	The system provides a list of students who have not met all graduation requirements sorted alphabetically within the requirements they have not met.	High							

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Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Special Program Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to enroll students in any type of program the district offers.								
2	The system provides the ability for the district to establish a code table defining programs offered by the district.								
3	The system provides the ability to record the manner by which information about a student's potential need for special services was gathered. (e.g. education assessment, health assessment/screening, special education assessment/evaluation, staff refer								
4	The system provides the ability for the district to establish a code table defining identification procedure codes.								
5	The system provides the ability to record information gathered by a qualified evaluator about an individual's need for a special program/service.								
6	The system provides the ability for the district to establish a code table defining a student's special needs.								
7	The system provides the ability to record whether an individual is eligible to participate in a special program or receive support services.								
8	The system provides the ability for the district to establish a code table defining a student's Participation Eligibility Indicator.								
9	The system provides the ability to record the name of the individual or organization making the referral.								
10	The system provides the ability to record the reason that a student needs special or supplemental services. (e.g. academic difficulty, academic excellence/enrichment, language difficulty, etc)								
11	The system provides the ability for the district to establish a code table defining program participation reasons for use by the schools.								
12	The system provides the ability to record the month, day, and year on which a student is identified as being eligible to participate in special programs or to receive support services.								
13	The system provides the ability to record the month, day, and year on which a student begins to participate in a special program.								
14	The system provides the ability to record a description of the individual or institution providing services to the child.								
15	The system provides the ability for the district to establish a code table defining program providers.								
16	The system provides the ability to record the site or setting in which a child receives his or her services.								
17	The system provides the ability for the district to establish a code table defining program settings.								
18	The system provides the ability to record the type of organizational sponsorship of the program.								
19	The system provides the ability for the district to establish a code table defining program sponsors.								
20	The system provides the ability to record the primary method by which funds are generated in order to support a program.								
21	The system provides the ability for the district to establish a code table defining program funding sources.								

22	The system provides the ability to record description of the services provided to a student enrolled in a program.							
23	The system provides the ability for the district to establish a code table defining program services.							
24	The system provides the ability to record the number of minutes per week of service the student is receiving.							
25	The system provides the ability to record the name of the individual or organization providing the specific service.							
26	The system provides the ability to record the month, day, and year on which a student began participation in the program service.							
27	The system provides the ability to record the month, day, and year on which a student last participated in or received the program service.							
28	The system provides the ability to record the manner by which information about a student's participation and progress was gathered.							
29	The system provides the ability for the district to establish a code table defining program monitoring/evaluation methods.							
30	The system provides the ability to record further information or comments about the student's participation and/or progress in special programs.							
31	The system provides the ability to record the reason a student is no longer being served by a special program.							
32	The system provides the ability for the district to establish a code table defining program exit reasons.							
33	The system provides the ability to record the month, day, and year on which a student last participated in the program.							
34	The system needs to provide the facility to map the codes in the special program tables to state and federal equivalencies.							
35	Ability to calculate unduplicated total student counts							
36	Ability to record any changes by type of change, date, and by whom for each special program							
37	The system should allow for unlimited multiple occurrences of special program enrollment activity associated with each student.							

Student Information System Functional Requirements for NSD			One Res pon se per						
#	Special Education Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
General/Administrative Requirements									
1	The system allows tracking of students who are not attending (or only attending part-time) in the school district but who are receiving special education services from the school district.	High							
2	The system provides calendaring functions and calendars integrate with Microsoft Exchange.	High							
3	The system provides an audit trail for data updates and reports on systems usage.	High							
4	The system provides integration with attendance systems to display attendance data and history where appropriate in the special education demographic information or related screens.	High							
5	The system allows specified users to change processes due to changes in city/state/federal regulations.	High							
6	The system allows the ability to incorporate new IDEA changes as per relevant regulations.	High							
7	System provides search capabilities to review summary level information for any student in this system.	High							
8	The system provides all special education report requirements for state and federal reporting including appropriate enrollment reporting reports to include the P223H, Special Education Students Suspended/Expelled and Timeline for Initial Evaluation of Special Education and Transition from Part C to Part B by Child's 3rd Birthday reports.	High							
9	The system provides the capability of maintaining historical data.	High							
10	The system provides the capability to add and maintain new school sites.	High							
11	The system allows users to select multiple students based on queries and then perform work flow or status updates on the selected list of students.	High							
12	The system provides personalization features that allows each user to view their current case load.	Low							
13	System provides a complete history of all who access student info between various processes and functions.	High							
14	The system allows for the importing and exporting of Student Information and Special Education data.	High							
Document Management									
15	The system provides the ability to initiate, track, and print all documents related to an individual student.	High							
Reporting									
16	The system provides standard and user defined data types to support compliance reporting.	High							
17	The system provides an ad hoc query tool.	High							
18	The system provides the capability of selecting and printing multiple reports at one time.	High							
19	The system allows users to create, modify, execute, preview, and save queries.	High							
20	System provides report editors for Districts to change report designs based on changes in State or Federal reporting design/standards.	High							
Intervention									
Referrals									
21	The system allows for tracking of the Initial Referral Date to special education and the date of signed Consent for Evaluation.	High							
22	The system allows approved evaluators access to pertinent student information (security).	High							
23	The system provides configurable forms for entering and tracking preschool referrals for special education services.	High							
24	The system allows the tracking of critical dates of Intervention meetings.	Low							

25	The system allows reporting on intervention history during referral processing.	Low							
	Eligibility Determination								
26	The system allows the tracking of the Eligibility Type (Initial, Reevaluation, Waiver or Transfer).	High							
27	The system allows for the tracking of the Eligibility Meeting Date.	High							
28	The system provides the capability of entering the Eligibility Decision (IDEA, Ineligible, Section 504, Evaluation Terminated or Revoke Consent).	High							
29	The system allows the input of an Evaluation Extension code.	High							
30	The system allows the input of a Case Manager.	High							
31	The system allows the ability to record a student's primary State disability code.	High							
	IEP Processing								
32	The system allows the input of an IEP Start and End Date.	High							
33	The system allow for the input of an IEP Meeting Date.	High							
34	The system allows for the tracking of Parent Consent for Initial Services.	High							
35	The system allows for the input of a state defined LRE code.	High							
	Related Services								
36	The system allows for the creation of imbedded instructions and/or tutorials.	High							
37	The system allows for tracking of Special Education notifications and dates.	High							
38	The system provides user defined fields with user defined codes.	High							
39	The system provides the capability of log in information which is linked to SIS system. Same username and password. Single login preferred.	High							
40	The system provides the ability of controlling whether IEPs can be altered once completed. Administrator can re-open an IEP.	High							
	Placement								
41	The system provides a record of all schools, settings in which the student has been placed throughout his/her pre-K and school age history in special education.	High							
42	The system allows reporting on the student's current attend location.	High							
47	The system allows the user to forward pertinent student information to evaluators	High							
48	The system will identify students due for reevaluations or triennial evaluations	High							
49	The system monitors evaluations through automatic notifications to users for critical upcoming milestone dates	High							
50	The system can track and maintain evaluation results	High							
51	The system enables a school representative to access individual assessment reports from all evaluators	High							
52	The system can allow a user to track assessment type and data	High							
53	The system supports the ability to retrieve relevant assessment data	High							
54	The system allows a user to track completion date of evaluation	High							
55	The system can allow the capability to input the initial evaluation, and IEP Development Meeting on the same meeting date and time	High							
56	The system supports Functional Behavioral Assessment results	High							
57	The system provides an alert on assessments that determine eligibility prior to the 60-calendar day deadline from the receipt of parental consent to evaluation of the student	High							
	Eligibility Determination								
58	The system accommodates communication/collaboration on IEP development across parents, general education teachers, special education teachers, related services providers, school psychologists and others	High							
59	The system can alert users about eligibility timelines from a given process start and completion	High							
60	If student is not eligible the status should carry over to the detail screen as 'not eligible'	High							
61	The system tracks all outcomes for the eligibility meeting	High							
62	The system tracks student's primary and secondary disability categories and conditions	High							
63	The system generates a future IEP meeting and future re-evaluation meeting date	High							

64	The system will alert the user that an IEP meeting must be held within 30 days for students who come from other District(s) and have an IEP to determine continuing eligibility for receiving special education services	High							
65	The system maintains data on prospective eligible infants for early intervention services	High							
IEP Processing									
66	The system provides the ability to access and review current and past IEPs	High							
67	The system stores previous IEPs completed in the system at earlier dates	High							
68	System allows schools to scan and store IEPs developed in other districts to be added to the students' file.	High							
69	The system allows current updates to be made based upon changing IEP formats and standards	High							
70	The system allows more than one user to access and edit different sections of the IEP simultaneously	High							
71	The system provides document version management to ensure the "final", signed IEP is not modified without due process	High							
72	The system allows the user to print blank IEP forms	High							
73	The system provides a final review, modification, edit, spell check of any document available to the user prior to printing	High							
74	The system provides alerts, which notify users of incomplete IEPs and state reporting requirements	High							
75	The system allows for the update of the annual review date needed for compliance	High							
76	The system flags each required field on the IEP	High							
77	The system prevents the acceptance of contradictory or invalid entries, i.e. a related service cannot begin on a holiday	High							
78	The system maintains data related to extended school year plans	High							
79	The system can report data about extended school year accommodations	High							
80	The system can report on separate pieces of the completed IEP (e.g. accommodations)	High							
81	The system can report when IEP due date is out of compliance	High							
82	The system can escalate transportation requests to appropriate individuals and levels, including specialized equipment necessary	High							
83	The system can catalog lists of assistive technology devices including product descriptions	High							
84	The system allows the user to maintain an inventory of assistive technology devices	High							
85	The system tracks students requiring assistive technology	High							
86	The system allows the user to develop individualized transition plans (post secondary outcomes, transition services, criteria and responsible agencies providing services)	High							
87	The system tracks transition statement or plan recommended	High							
88	The system allows the IEP developer to reference state and local instructional goals and objectives and other district databases designed to address special needs and add them as appropriate to the student's plan	High							
89	The system allows the user to generate printed progress reports that are tied to the IEP goals and objectives	High							
90	The system has the capability to track progress reporting from IEP goals	High							
91	The system allows the user to create user-defined queries based on any grade and progress report element	High							
92	The system can generate a Summary of Performance document for students who are exiting special education	High							
93	The system needs to support more than one IEP format i. e. disability based, gifted, transition.	High							
94	The system can support the development of all aspects of Section 504 Plans, including tracking and monitoring IN SIS	High							
Related Services									
95	The system can report on related service by student ID	High							
96	The system will report on related service by related service type	High							

97	The system will report on related service by provider name and ID	High							
98	The system can maintain provider information including credentials and licensure	High							
99	The system allows district level users to view related service providers' schedules	High							
100	The system will report first attend dates for all related services per student	High							
101	The system allows user-defined authorized personnel to have access to special education classroom caseload data	High							
102	The system tracks related service provider's notes on students' receipt of services	High							
103	The system allows any related services provider to enter related services attendance information	High							
104	The system provides alerts for students who are not attending required IEP services	High							
105	The system allows the user to track all service costs which a district can bill to a third party including all state and federal reimbursable Special Education services.	High							
106	The system allows the user to track all state and federal reimbursable services on a student including the student's identification number and/or social security number.	High							
107	The system has an online (web-based) encounter attendance capability.	High							
108	The system will report attendance encounters by provider/student/school/agency	High							
109	The system provides for an electronic service log data entry and allows existing staff to enter reimbursable activities. Staff providers can be special education or general education personnel.	High							
110	The system identifies and alerts the staff of under-reporting services.	High							
111	The system allows for the creation of imbedded instructions and/or tutorials.	High							
112	The system imports the current picture of the student into the IEP.	High							
113	The system allows for the creation of an IEP at a glance.	High							
114	Log in information is linked to SIS system. Same username and password. Single login preferred.	High							
115	Staff inputs data into IEP screens that look the same as the finished product.	High							
116	IEPs cannot be altered once completed. Administrator can re-open an IEP.	High							
Placement									
117	The system maintains a record of all schools, settings in which the student has been placed throughout his/her pre-K and school age history in special education, including case managers	High							
118	The system generates forms to parents for permission to place students	High							
119	The system generates forms to parents for permission to change the placement of students	High							
120	The system tracks Manifestation Determination Review (MDR) data	High							
121	The system provides online MDR forms (Manifest Determination Review).	High							
122	The system can report MDR data	High							
123	The system can print MDR forms	High							
124	The system can track service provisions at any location identified	High							
125	The system can report on current attend location	High							
126	The system can accept changes to IEP placement information with proper user authorization	High							
127	The system can inform the user of procedures to follow to change current IEP information	High							

Student Information System Functional Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Behavior Records Requirements		Y	C	M	F	3	N	
1	The system provides all of the state required data should be included in the information entered by a school when reporting an incident: school year, building (default automatically), incident number (created by system using district wide numbers), offense code , the date, time, location , reported by (from menu), reported to (electronically), weapon type (if applicable), and free text to describe incident details. There should also be the option to enter police contact information such as date, time , investigator type, investigator name, badge and name of police department. Attached to this incident should be all offenders, victims and witnesses with the actions taken and parent/guardians contacted.	High							
2	The system allows district-specific fields to be defined for storing additional data about incidents, offenders, offender actions, victims, victim actions, and witnesses.	High							
3	The student discipline module must allow the school and district to standardize its approach to categorizing infractions and the disposition for different levels of an infraction.	High							
4	The system provides a simple posting routine must be in place that will allow the user to add the infraction date, time, infraction type, student, location, staff reporting the infraction, free-form comment of what happened, the disposition, re-admission date, disposition date, time, and	High							
5	The system provides a for searching for groups of students users should be able to search for students by ID, name, type of infraction, re-admission date, disposition date, disposition code, compliance status and teacher reporting or monitoring the transaction.	High							
6	The system provides a posting routine that has default codes when appropriate that are determined at the district level and can be mapped to district discipline codes.	Medium							
7	The system provides a view where the administrators see all of the information on a student's discipline at one time. This will include all the information that is part of the posting routine.	High							
8	The system provides a display all offenses associated with an incident when viewing the student profile.	High							
9	The system should have the ability to view discipline information for a range of dates (current and previous years) for any combination of schools.	High							
10	The system includes a report of detailed discipline incidents with all incident information by school, student, infraction, disposition, action type, infraction teacher, and disposition teacher.	High							
11	The system includes a report of infraction statistics .	High							
12	The system includes a report of disposition statistics.	High							
13	The system includes a report of discipline letters to address by range of disposition codes., disposition starting and ending date, infraction codes and their respective starting and ending dates.	High							
14	The system is incident driven with each incident allowing multiple offenders, witnesses, and/or victims.	High							
15	The security system ensures that only authorized school district personnel can access this highly confidential information. Building access restrictions provide security against unauthorized inquiry or changes to student and/or incident records.	High							
16	The system allows a discipline entry to be initiated by student name or student ID.	High							
17	The system prompts the user to add an offender, victim, and / or witness when entering an incident.	High							
18	The system provides a automatic generation of incident tracking numbers at a district level.	High							
19	If the student is special education, the system will notify the person entering the incident when the student has a designated number of days of out of school suspensions.	High							

20	The system displays special education or 504 designations regarding the student when entering an action item.	High							
21	The system allows multiple occurrences of any action to be assigned to an offender and allow these actions to be scheduled.	Medium							
22	The system provides a consistent means of tracking the final result of the offender's action.	High							
23	For each Offender's Action, the system allows the user to specify the length of actual duration if it differs from the original assigned length of time and the reason why the action time was shortened.	High							
24	For each Offender's Action, the system allows the user to specify the duration of the action assigned	High							
25	The system is capable of storing and displaying information about each Offender's Action (e.g. action number, action code, action building, duration scheduled, duration actual, duration reason, disposition code, occurrences total, and occurrences outstanding).	High							
26	The system is capable of entering the scheduled and actual dates / times for the actions assigned to the student. This includes allowing multiple occurrences for a single action.	High							
27	The system is capable of automatically generating an email to the parents / guardians when a discipline event occurs.	High							
28	The system prompts the user to add actions when an Offender has been added.	High							
29	The system provides a user-friendly means of obtaining further details regarding individuals involved in the incident, guardians, district-defined information, additional code information, and duration information.	High							
30	The system is capable of automatically generating different notification letters and emails for parents or guardians when a student accumulates a certain number of actions and/or offenses.	High							
31	The system is capable of generating discipline letters and emails to multiple parents and/or guardians.	High							
32	The system is capable of generating discipline letters in multiple languages.	High							
33	The system provides the ability to generate a campus report that includes incident information (e.g. offenders, victims, witnesses) based on the building and classroom in which the incident is associated.	High							
34	The system is capable of producing a report that provides the total number of incidents by incident type per month and the average number of incidents per day for the incident type. The report includes a total and daily average for a building and for all buildings included in the report.	High							
35	The system allows campuses to produce a report that lists the students who are assigned to serve disciplinary actions each day within a specified date range.	High							
36	The system supports the ability to track discipline infractions other than those required by the state department of education.	High							
37	The system includes security so that only authorized school district personnel can access this highly confidential information.	High							
38	The system allows the teacher to be able to create an electronic referral that can be completed by an administrator to generate a Discipline Incident in the Discipline System.	High							
39	The system creates an email notification sent to the appropriate administrator whenever a teacher referral has been sent.	High							
40	A teacher can generate e-mail to parents/guardians whenever classroom discipline events occur.	High							
41	The system has a display of all students who have been reported as victims and a victim report by school and by student to aid counselors in helping students.	High							
42	The system tracks minor incidents (perhaps notes) that do not need to be entered as formal incidents but need to be tracked for number of occurrences. A report of these notes (minor incidents) for an individual should be available for printing.	High							
43	The system has a report of all special education students with incidents for a specific date range.	High							

44	The system allows for multiple offenders to be attached to an incident and different actions (Disciplinary measures) to be assigned to each offender.	High							
45	The system allows for multiple actions (disciplinary measures) to be assigned to an offender for a specific incident and all actions must be recorded and displayed when viewing the student profile and in reports. The information that should be recorded for each incident are: action type, date action (disciplinary measure) begins, number of days of the action with the end date automatically calculated by the system and who assigned the action(s).	High							
46	The system displays guardian/parent information when entering an incident to indicate as to when the parent/guardian was contacted, the date and time and the type of contact made (phone, email, letter, etc.).	High							
47	The system must generate an incident report for building administrators that includes the information needed for their end of the year NCLB reports.	High							
48	The system requires the entry of a Weapon, if a particular offense code is entered.	High							
49	For each action type entered in the system codes, there must be an indicator if this action when assigned should be calculate the end date of the action based on calendar days or school days.	High							
50	The system codes for Offense types and Action types must have a mapping to state codes.	High							
51	The system should automatically create an in-school-suspension list for the day by school to be used by the in-school suspension supervisor.	High							
52	The system can produce a report of the number of offenses sorted by the "reported by" person with drill down capability to see specific incidents.	High							
53	The system can produce a report of the number of offenses by team for a specific date range. The report would include date, type of offense and action taken and duration of action.	High							
54	The system should have an electronic response function where an administrator can respond to the teacher's electronic referral with the action taken	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to store: physician/health provider name	High							
2	The system provides the ability to store: physician/health provider address	High							
3	The system provides the ability to store: physician/health provider phone number	High							
4	The system provides the ability to store: preferred hospital	High							
5	The system provides the ability to store: dentist name	High							
6	The system provides the ability to store: dentist address	High							
7	The system provides the ability to store: dentist phone number	High							
8	The system provides the ability to store: health insurance company	High							
9	The system provides the ability to store: health insurance plan #	High							
10	The system provides the ability to store: health insurance coverage status (yes or no for have health insurance)	High							
11	The system provides the ability to store: school insurance status (yes or no)	High							
12	The system stores and reports "Medicaid Status" which indicates the Medicaid status of a student.	High							
13	The system stores and reports "Medicare Status" which indicates the Medicare status of a student.	High							
14	The system has the ability to record multiple health concerns for each student	High							
15	The system allows for District table driven health concern codes and descriptions	High							
16	The system provides the ability to store Health Concern date recorded	High							
17	The system provides the ability to store Health Concern narrative comments	High							
18	The system provides the ability to store Health Concern severity flag for medical alert (including life threatening)	High							
19	The system provides the ability to store Health Concern confidentiality level code	High							
20	The system provides a place to track outside referrals and critical health issues.	High							
21	The system provides a flag to indicate nursing service level required for student (to be manually entered)	High							
22	The system provides a flag to indicate if student requires daily medication administered at school (yes/no)	High							
23	The system provides multiple flags to track specific District table driven medical conditions (for example, wears glasses)	High							
24	The system provides the ability to record date of last physical exam	High							
25	A complete student health history can be maintained with reporting capabilities that alert staff of the daily needs of individual students, such as medications required to be administered.	High							
26	The system provides the capability to log medication administration.	High							
27	The system provides the capability to alert when a student is scheduled to receive medication.	High							
28	The system provides the ability to record multiple immunizations/vaccinations	High							
29	The system allows for District table driven immunization/vaccination codes and descriptions meeting Washington state requirements	High							
30	The system allows for noting a student is immune to a vaccination								
31	The system provides a waiver/exemption may be recorded for each immunization/vaccination	High							
32	The system provides a waiver/exemption date may be recorded	High							
33	The system allows for District table driven (status) reason codes and descriptions for waivers/exemptions	High							
34	The system provides narrative comments to be tracked for waivers/exemptions	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	
35	The system tracks all immunizations according to Washington state requirements	High							
36	The system tracks each immunization inoculation by vaccine type	High							
37	The system tracks immunization inoculation by administration date	High							
38	The system provides the ability to store Immunization: Diphtheria	High							
39	The system provides the ability to store Immunization: Tetanus	High							
40	The system provides the ability to store Immunization: Pertussis	High							
41	The system provides the ability to store Immunization: Polio	High							
42	The system provides the ability to store Immunization: Measles	High							
43	The system provides the ability to store Immunization: Mumps	High							
44	The system provides the ability to store Immunization: Rubella	High							
45	The system provides the ability to store Immunization: HIB	High							
46	The system provides the ability to store Immunization: HepB	High							
47	The system provides the ability to store Immunization: MMR (combination Measles, Mumps, and Rubella)	High							
48	The system provides the ability to store Immunization: DTP (combination Diphtheria and Tetanus)	High							
49	The system provides the ability to store Immunization: MR (combination Measles and Rubella)	High							
50	The system provides the ability to store Immunization: Varicella								
51	The system includes the ability to generate form letters to parents/guardians	High							
52	The system includes the ability to generate mailing labels for any letters generated by system	High							
53	The system provides automatic compliance evaluation reports.	High							
54	The system generated compliance report/displays have an option to include or exclude students with waivers/exemptions	High							
55	The system provides the ability to automatically re-calculate a student's compliance status for a change in birthdate.	High							
56	The system provides the ability to automatically re-calculate a student's compliance status for a change in grade level.	High							
57	The system allows for compliance checking by grade level (students in one grade level may have different immunization requirements than students in another grade level).	High							
58	The system provides susceptibility reports(I.e., all students not immunized, including students with waivers/exemptions)	High							
59	The system has the ability to run report for multiple diseases	High							
60	The system provides the ability to run report for district or for specific school(s)	High							
61	The system provides the ability to select creation (or omission) of form letters for those deemed susceptible	High							
62	The system allows immunization form images to be stored in the system	High							
63	The system provides the ability to record multiple exam/screening records for each student	High							
64	The system allows for District table driven exam/screening codes and descriptions	High							
65	The system provides the ability to store Health Screening: date of exam/screening	High							
66	The system provides the ability to store Health Screening date of results of exam/screening	High							
67	The system provides the ability to store Health Screening results of exam/screening	High							
68	The system provides the ability to store Health Screening narrative comments for exam/screening.	High							
69	The system includes the ability to scan and store exam/screening information	High							
70	The system provides the ability to flag and report exam/screening failures	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
71	Information must be present that identifies dates for vaccinations, vision, hearing, examinations, other medical screenings that may be required in the future, free form for comments, allergy information, dental card entry and physician's name and telephone number from one summary screen in the student's data section. This should also include the student's picture. Student's Picture should also display on the medication page.	High							
72	Provide extensive standard and customizable reports (including Immunizations, Complete Health Record, Screening, Incidents, Daily Log, Statistical, Year End and Letters). Reports can be run for a selected group of students based on user-defined criteria.	High							
73	System should provide for access security at the field level for medical records.	High							
74	A school and sports injury system is also desired to track injuries, health examinations for eligibility, insurer covering the injury, and a free form for comments that describes how the injury occurred. This should be a drop down selection on the log for accidents on nurses log that could be forwarded to safety and security manager.	High							
75	There are numerous reports that are required on an adhoc basis. General ad hoc abilities must allow for information to be reported on user defined criteria and flexible enough to allow for future reporting.	High							
76	The system provides a report of previous nurse visit history.	High							
77	The system provides a report of students who require medication	High							
78	The system provides a report of exemption	High							
79	The system provides a report of immunization list	High							
80	The system provides a report of students missing immunization list	High							
81	The system provides a report of health and physical examination list	High							
82	The system provides a report of summary of the student's health and medical data	High							
83	The system provides a report of sports participation	High							
84	The medical module is fully integrated with the demographic data with security levels to maintain confidentiality.	High							
85	The system has the ability to track screenings with their dates, results, location, and the grade the student was in at the time.	High							
86	The system allows for district-defined medical screens and fields.	High							
87	The Office Visits screen allows the user to enter basic information about medical office visits for multiple students on one screen.	High							
88	The system has the ability to maintain open records for multiple students at one time providing effective triaging of students.	High							
89	The system has the ability to track building, date, time, reason, examiner, referral data including the number of referrals and follow-ups to the referrals, location, examination data, and treatment information (including medication and dose) for the office visit. Includes free form text field for additional notes.	High							
90	The system has the ability to add any new medications to lists of prescribed medications as new medications are being FDA approved; treatments such as dressing changes-if come in for frequent or daily nursing care; formula feedings in G-tubes; and other daily frequent care that may arise, must be able to view all past visits including past schools.	High							
91	The system has the ability to generate user defined medical alerts.	High							
92	The system has the ability to generate alerts to follow-up on medical referrals and input follow-up information.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
93	The Office Visit area includes fields to record additional information such as blood pressure, pulse, temperature, respiration, blood sugar, testing results, carbs and free text comment with no limit.	High							
94	The system will generate a daily medication log that can also remain open throughout the working session.	High							
95	From the Office Visit screen, the user can easily view the prior visits and medical information for a student.	High							
96	The system allows for full immunization histories for shots and immunization series requirements.	High							
97	The system automatically calculates immunization compliance on-screen based on specific state requirements to determine which students are not up-to-date and which ones are complete. System must be easily configurable to make changes in State requirements. Should also have free text field for notes.	High							
98	Immunization criteria can be configured to meet individual district requirements, using student's age, grade, date of birth, grade period date, etc.	High							
99	The system supports Immunization schedules, as defined by the CDC and the Department of State Health Services), will be preloaded when the system is installed and updated by the company as changes occur.	High							
100	The authorized user may check selected groups of students to check for immunization compliance. The user may select which series and which schedule should be used.	High							
101	The system allows multiple requirement schedules to be set up for the same immunization series for when there are different requirements at different ages, such as more stringent requirements for younger students.	High							
102	The system is capable of maintaining immunization schedules for both minimum and recommended requirements. The recommended schedule should include doses at specified ages, for students who started immunizations on time. The minimum schedule should identify the minimum time intervals needed between doses, for students who started their immunizations late.	High							
103	The system allows a grace period calculated per day and allows for a minimum number of shots.	High							
104	The system allows an alternate dose that can be defined to can count toward satisfying a series requirement.	High							
105	In order to satisfy immunization requirements, a shot can be counted toward more than one series, or it may be tracked as part of one series, but it may also be counted as a series itself.	High							
106	The system tracks religious and medical exemptions.	High							
107	The system allows additional information to be entered for each shot such as referral information, follow-ups, free text area, etc.	High							
108	The system allows letters to parents/guardians to be generated for students with immunization delinquencies. A report listing these students and their delinquencies will also be provided.	High							
109	The system has the ability to print immunization notice letters to the parent with a current copy of the complete immunization record on file and available resources to obtain immunizations needed.	High							
110	The system has the ability to view and print complete immunization records for each student.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
111	The system allows medical records to be maintained for withdrawn students as well as currently active students.	High							
112	The Growth screen includes the student's height, weight, calculated percentile, and BMI.	Medium							
113	The system automatically pulls the student's growth percentile from the percentile table using the student's age as of the date of the exam. The percentile table includes ages up to 21.	Medium							
114	The system allows screen specific notes areas to be available. E.g., in clinic visits, immunizations, medical alerts, screenings.	High							
115	Wherever possible, mass add/update utilities assist the user to make repetitive entries/updates for a selected group of students. The user can override individual student's data. Such data should include immunizations, shots, growth, dental, vision, hearing, prescribed and OTC medication, district-defined screens, etc. System should allow to mass update/add for 2 or more options at the same time, e.g. mass load vision and screening for all 5th graders with a default of pass. System should be configurable to add additional data elements.	High							
116	If any medical information is shared with the Demographics module such as Emergency Contacts and the data is changed in either module, the update appears in the other module.	High							
117	Authorized users maintain the district's validation tables for medical codes throughout the medical system.	High							
118	The system security will allow authorized users of the Student Demographics module to view or update Emergency Contact information while restricting their access to confidential medical information.	High							
119	The system has the ability to generate accurate and reliable reports of all KS state mandated screenings, immunization records including overdue list, individual student clinic visits, and medical alerts.	High							
120	Produces Growth Chart in graph format. The growth chart can be produced in a printable format. This not an immediate requirement.	Low							
121	Produces a Growth Chart report that prints the student's height and weight, percentile, and BMI as recorded on the Growth screen. This not an immediate requirement.	Low							
122	Meets all State Department of Education health reporting requirements.	High							
123	The system has the ability to generate accurate and detailed monthly district level reports.	High							
124	The system has the ability to run confidential reports on selected students and provide to teachers as needed.	High							
125	The system must be able to provide the ability to completely and descriptively document student medical office visits, independent health plans, referrals, follow up care, student incidents and state mandated required screenings.	High							
126	The system has the ability to have efficient access to query for student information.	High							
127	The system has the ability for logical flow through the program. The program must be user friendly not requiring extensive training or understanding of technological language.	High							
128	The system has the ability to generate and access individual health plans as part of the student's medical record.	High							
129	NIC-NOC and NANDA nursing standardized language preferred for nursing diagnoses, health care plans, and abbreviations.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
130	The system should be able to maintain and store a standardized health care plan per student and have the ability to check off progress within the plan and modify. It should have an option to connect to IEPs and 504. User should be able to click on links or alerts to view the health care plan while being able to view previous history.	High							
131	The system has the ability to chart and print detailed information regarding student's individual office visits, daily medication logs, accident reports, blood pressure logs, glucometer reports. Should maintain user defined fields for daily logs such as a diabetes flow sheet.	High							
132	The system has the ability to efficiently access, verify, enter data and print all information on a student medical record.	High							
133	The system allows convenient analysis of documented data (i.e. analyze frequency and reason for clinic visits) review follow-up for medical concerns.	High							
134	The system produces professional reports, form letters and immunization notices.	High							
135	The system has the ability to scan forms/information into the clinic visit screen and attach to the student record.	High							
136	The system has the ability to scan or enter the student ID number for students information and data entry, (i.e.. Medical alerts, individual clinic visits, etc.)	High							
137	The security of medical information must comply with FERPA requirements.	High							
138	The system has the ability to generate a Medicaid billable report. The report must include the nurses name and credentials.	High							
139	System should be able to integrate with the Green Bush Medicaid billing system. This is used to track Medicaid eligible students with special health care services that are Medicaid reimbursable and directly related to special education.	Medium							
140	The software is able to easily import and export data to and from student files maintained in other medical packages.	High							
141	The vendor maintains and implements all new state requirements in a timely manner.	High							
142	The system allows access daily attendance to track students. Nurses should be able to notify teachers and administrators that students are in the nurses office.	High							
143	The system has the ability to create a report for teacher for field trip with medical info, emergency contacts, and all health insurance information. This should be viewable using a mobile data device.	High							
144	The system will generate a report when there is 5% change from day to day (or total of 10%)of student absences to notify health department.	High							
145	When entering nurses visits/logs allow partial entry of student name without the need of a wildcard. System should facilitate smarter searches.	High							
146	The system allows use of tab button to navigate across a record on the nurses visits log.	High							
147	The SOAP (Subjective Objective Assessment Plan) section to have the option to check common assessment, interventions such as 2 acetaminophen, 1 ibuprofen, cough drops, febrile, color pink, alert, etc.	High							
148	The system provides a default nursing diagnosis like "Health Maintenance Altered" should come up and nurses have the ability to change it as needed.	High							
149	The system includes the ability to spell check.	High							
150	The system allows cut and paste from other programs such as Word, Excel, or PDF into the SOAP and vice-versa.	High							
151	The system maintain a calendar of scheduled medications which include medication, dosage, frequency, route, etc.	High							

Student Information System Functional Requirements for NSD				One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
152	The system allows auto save options on all screens.	High								
153	The system allows tracking of PRN medications (i.e. pain medication, cough medication, etc.)	High								
154	The system allows tracking of Blood Pressure and other health concerns as needed.	High								
155	When querying health screen results, ability to pull up failed with correction and failed - corrected at the same time.	High								
156	The system has the ability to define, alert and print life threatening conditions.	High								
157	The system has the ability to directly email a student's teachers and/or parents about an issue directly from the system. It would automatically set up email addresses based on criteria selected.	High								
158	The system has the ability to enter, by student, other health factors (this is very confidential information like student has a neurological disorder or is ADHD, etc.) Should be able to select information from a pull down menu or enter free text. The level of security for this information needs to be very high.	High								
159	The system allows for Individualize Health Care Plans. It needs to be in a friendly format to develop these IHPs to enable nurses to use nursing diagnosis. Nurses should not be able to enter IHPs unless they have entered a nursing diagnosis. Should be able to review yearly—make updates as needed throughout the year—and make a report on all IHPs that are current—separate IHPs that are “discontinued” due to resolution of the health concern or no longer applicable in the school setting. A way for nurses to know who has an IHP and then easy access to view and print it	High								
160	The system provides a journal/record of all students receiving medicine or injuries (office visits) with a date/time stamp that meets the Department of Health and State requirements.	High								
161	The system provides the ability to maintain Medicaid/Medicare eligibility.	High								
162	The system provides billing capability for Medicaid/Medicare services.	High								
163	The system includes the ability to define selection and sort criteria and generate a report of students due for specific exam or screening.	High								
164	The system includes the ability to define selection and sort criteria and generate a report of students who missed specific exam or screening.	High								
165	The system includes the ability to define selection and sort criteria and generate a report of students who failed specific exam or screening.	High								
166	The system includes the ability to produce form letters for students using selective criteria such as failing exams or screenings .	High								

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Fees Requirements	Priority	Y	C	M	F	3	N	
1	The system has the ability to clearly define fees for users and end users according to categories such as required, optional, course fees, etc.	High							
2	The system has the ability to assign and un-assign fees in mass by grade, team, course or individually as appropriate.	High							
3	The system has the ability to quickly show the detail descriptions of the fees to users on the same screen where fees are displayed, e.g., use of pop up windows or notification.	High							
4	The system allows users to be granted access to add, remove, and accept payments for fees for one or many activities for a specific building.	High							
5	The system allows users to be granted access to add, remove, and accept payments for fees for one or many buildings.	High							
6	The system allows users access to add, remove, and accept payments for own building, but to read or view fees and payments in other buildings. Fee information is tied to the student and not the building.	High							
7	The system allows print and maintain student invoices and fees due correspondence of all fees owed by a student with a date range option.	High							
8	The system has the ability to maintain student invoices and correspondences for fees due for students who have withdrawn or transferred to another school within the district. The system keeps a history of paid and due fees.	High							
9	The system has the ability to generate a balancing report to show debits against credits per school.	High							
10	Fees and payments can be imported/exported to/from other systems, e.g. financial system, library system, food service, etc. The system has the ability to easily upload fee information into accounting systems.	High							
11	The system provides a report for users to print at the end of the day that details the payments they accepted and amount of payments they accepted in total and by type (cash, check, etc.).	High							
12	The system provides the ability to add standard fees by activity.	High							
13	The system provides the ability to mass print a report of fees owed by student for mailing.	High							
14	The system provides the ability to see all student fees on one page. The fees include all fees owed for current, next and previous years.	High							
15	The system provides the ability for fees to be paid online. The system is configured to facilitate easy integration with backend payment processing systems.	High							
16	Parents have the ability to see a detailed history of payments online with a drill down capability that provides the detail of what was paid for and what remains due.	High							
17	The system provides the ability to see/apply payments/fees for students moved to different district school or for fees that have been 'archived'.	High							
18	The system has the ability to accept lump sum payments and the ability to prioritize what fees are paid first.	High							
19	The system has a report of fees paid/due by grade level.	High							
20	The system has reports and screens, including receipts, that show refunds as a negative number, possibly in different colors.	High							
21	The system allows the district to define fees that can have partial payments.	High							
22	The system provides an email interface to allow emailing parents a fees due notice by fee or by student or receipt either by mass or by individual parent. This emails to the financially responsible parent. Parents are able to choose to receive via email or regular mail.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Fees Requirements	Priority	Y	C	M	F	3	N	
23	The system has the ability to track and process fee refunds efficiently. The system has the ability to notify users when refunds are due and to run transaction reports to track the status of refunds, credit card refund, etc.	High							
24	The system provides an easy method for individual schools to add grade level or activity fees for parents online.	High							
25	The system has the ability to generate collection letters for past due fees as defined by the user.	High							
26	The system provides the ability for fees to be paid on payment plan.	High							
27	The system provides the ability to automatically waive fees based on Free and Reduced status.	High							
28	The system provides the ability to pro rate fees based on admission date or admission to class.	High							
29	The system provides the ability to assign a fee or fees individually or in mass by course.	High							
30	The system provides the ability to assign all fees for next year.	High							
31	The system provides the ability to have user defined fees automatically assigned on admission.	High							
32	The system provides the ability for the system to alert bookkeepers when the Free & Reduced status (if waiver has been signed) has changed for a student in their building.	High							
33	The system provides the ability to transfer students between buildings without losing all payment history and the ability to refund if a withdrawal is done before fees are settled.	Mandatory							
34	The system provides the ability to indicate which parent/guardian has financial responsibility. The system has the ability to invoice any parties defined by the users.	High							
35	The system provides a simple to use Ad Hoc reporting option so that users can get easy, timely access to fee data. Users including teachers are able to easily query fees for any time period required.	High							
36	The system provides for logging/audit trail to be able to track who made changes/deletions to student data.	High							
37	The system provides fee and payment reports with detailed information (i.e. check number, course refund information, how paid, date paid, etc.).	High							
38	The system provides for access to peripheral systems data (i.e. 30 day lunch history).	Medium							
39	The system has the ability to generate formatted receipts. Users and parents are able to print receipts directly from the system for any payments.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Assessments Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides the ability to manage information relative to the general classification of an assessment administered to a student.								
2	The system provides the ability to record the reason for which an assessment is being conducted (e.g.: admission, assessment of student's progress, development of individualized educational program (IEP), development of individualized family service program, etc)								
3	The system provides the ability for the district to establish a table defining codes and descriptions for the reasons an assessment is being conducted.								
4	The system provides the ability to record assessment type for each assessment being administered (e.g.: achievement, advanced placement, aptitude, attitudinal, cognitive and perceptual skills, developmental observation, interest inventory, language program, etc)								
5	The system provides the ability for the district to establish a table defining codes and descriptions for assessment types.								
6	The system provides the ability to record assessment titles.								
7	The system provides the ability for the district to establish a table defining codes and descriptions for assessment titles.								
8	The system provides the ability to record the category of an assessment based on format and content.								
9	The system provides the ability for the district to establish a table defining codes and descriptions for assessment versions.								
10	The system provides the ability to record the description of the content or subject area (e.g., arts, mathematics, reading, stenography, or a foreign language) of an assessment.								
11	The system provides the ability for the district to establish a table defining codes and descriptions for assessment content.								
12	The system provides the ability to record subtest types.								
13	The system provides the ability to manage information relating to the administration of an assessment to a student.								
14	The system provides the ability to record the typical grade level or range of grade levels for which an assessment is designed.								
15	The system provides the ability to record the grade level of a student when assessed.								
16	The system provides the ability for the district to establish a table defining codes and descriptions for the grade level of a student when assessed.								
17	The system provides the ability to record the copyright date of the assessment.								
18	The system provides the ability for the district to establish a table defining codes and descriptions for copyright dates of each assessment.								
19	The system provides the ability to record the reason a student did not participate in the assessment								
20	The system provides the ability for the district to establish a table defining codes and descriptions for non-participation reasons.								
21	The system provides the ability to record the primary manner in which a test is administered to a student (e.g. group, individual).								
22	The system provides the ability for the district to establish a table defining codes and descriptions for administration methods.								
23	The system provides the ability to record the primary manner in which a test is presented to a student (e.g. computer adaptive test, oral, written).								
24	The system provides the ability for the district to establish a table defining codes and descriptions for the type of administration form.								

25	The system provides the ability to record any special variation in the administration of the test (e.g., untimed, use of sign language for hearing impaired, Braille test or large print form for visually impaired, or use of a reader or facilitator for administering the test. etc)							
26	The system provides the ability for the district to establish a table defining codes and descriptions for special accommodations.							
27	The system provides the ability to record the month, day, and year on which an assessment is administered.							
28	The system provides the ability to record the description of the place where an assessment is administered.							
29	The system provides the ability for the district to establish a table defining codes and descriptions for test locations.							
30	The system provides the ability to record the name of the individual and/or organization administering the assessment.							
31	The system provides the ability to manage information about assessment results, the manner in which they are presented, and factors which may influence their interpretation.							
32	The system provides the ability to record classifications of how results of achievement tests are related and interpreted (e.g.: norm-referenced, criterion-referenced ,achievement-level reference or benchmarked)							
33	The system provides the ability for the district to establish a table defining codes and descriptions for assessment reference types.							
34	The system provides the ability to record the group for which the scores of an assessment have been standardized for use in interpreting the results (e.g.: annual user, equated national, independent school, international, national probability sample).							
35	The system provides the ability for the district to establish a table defining codes and descriptions for norm groups.							
36	The system provides the ability to record the year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students.							
37	The system provides the ability for the district to establish a table defining codes and descriptions for norm years.							
38	The system provides the ability to record the time of year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students (e.g., fall, mid-year, or spring).							
39	The system provides the ability to report the lowest and highest individual scores obtained by a group of students who are in the same norm group.							
40	The system provides the ability to report the measure in which results are presented (e.g.: age score, grade equivalent or grade-level indicator, normal curve equivalent, normalized standard score, number score, pass-fail, percentage of items correct, etc)							
41	The system provides the ability for the district to establish a table defining codes and descriptions for reporting methods.							
42	The system provides the ability to store and report the description of a meaningful raw score or statistical expression of the performance of a student or group of students on an assessment.							
43	The system provides the ability to store and report the description of unusual testing conditions that must be known to properly interpret an individual's test score (e.g., non-standard administration, special circumstances, experience only, diagnostic only).							
44	The system has the ability to store and display state Washington Assessment of Student Learning (WASL) tests							
45	The system has the ability to store complete test history for all students							
46	The system has the ability to view individual student test scores							
47	The system has the ability to view all tests for a student							
48	The system has the ability to compare test scores for similar tests from year to year for a student							
49	The system has the ability to view class room average test scores							

50	The system has the ability to view test scores for new incoming students to a school								
51	The system provides the capability to print bar codes that contain student and school information on the answer sheets for standardized tests.								
52	The system provides the capability to pre-slug answer sheets for standardized tests with student identification number, names, gender, grade level, birthdate, special codes, and school number.								
53	The system should allow any standardized test score data to be printed on a student's transcript.								
54	The system provides the capability to do comparisons on standardized test scores for a student's entire test score history.								
55	The system provides the capability to import all test scores from any testing company and OSPI.								
56	The system provides the capability to manually enter all test scores from any testing company.								
57	The system provides a standard score distribution report that allows the user to display scores by any user-defined test administration criteria including, but not limited to: test, test administration form, test administration date, composite score								
58	The system provides a standard report, per student, of multiple test administrations, subtests and corresponding scores.								
59	The system provides a standard score distribution report that allows the user to display a selected test administration scores by user-defined student criteria including, but not limited to: grade level, class, ethnicity, and gender.								
60	The system computes the number of tests taken for a specified date range.								
61	The system allows customized export of user-defined test data.								
62	The system calculates and reports the percentage of test scores that meet user-defined test criteria.								

Assessment Reference Type

Norm Group

Norm Year

Norming Period

Score Range

Reporting Method

Score Results

Score Interpretation Information Reporting and Documentation

Test data is validated against a list of user-defined valid entries including:

- test name
- score name
- score range
- test type

Multiple types of scores are maintained including:

- integer
- pass/fail
- percentile
- freeform

Scores are validated by determining they fall within a pre-defined range identified for the score.

Students can be identified as exempt from a test as well as for one of multiple scores collected for a test.

Students for whom testing modifications were made can be identified by type of modification.

A teacher can generate a class test based on the objectives defined for the course.

A user-specified score on a standardized test (including WASL) can be defined as a requirement and used in the process to determine students who have not met requirements for graduation; for a specific diploma type; for a course of study

Test data can be exported easily by student; by grade level; by test administration

Multiple administrations of a test can be stored and reported for a student.

All tests tracked can be selected and reported on a student's transcript.

Both current and historical test data is accessible by teachers.

Capable to pre-slug/pre-print, user- defined answer sheets.

Test administration information is collected for standardized tests including:

Test Name

Test Form, Level, Or Edition

Administration Identifier (Date Or Code)

Test Date

User-Defined Test Type (I.E., End-Of-Course Or End-Of-Grade)

Score Type

Score Value

Subtest Name

Exemption Reason

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to create look up and report without requiring any programming or code modification by the user.	High							
2	The system provides acceptable table values when queried in an on-screen pop-up manner for easy entry and referral.	High							
3	The system provides access to context-sensitive help throughout the entire application.	Medium							
4	The system provides for automatic joining of tables without any programming or code modifications by the user.	High							
5	The system provides the ability to select any student table/view in the database.	High							
6	The system provides the ability to define reports and subsequently initiate their production.	High							
7	The system provides the ability to save user-defined reports.	High							
8	The system provides the ability to modify or copy saved user-defined reports.	High							
9	The system provides the ability to view created reports on-screen, print, save to external media in ASCII/Excel/Access formats or transfer to another software package such as dBase, Lotus, etc.	High							
10	The system provides the ability to execute multiple level sorting of report rows by data type.	Medium							
11	The system provides the ability to utilize the conditional factors "equal to (=)", "greater than (>)", or "less than (<)" between values and net values to create reports.	Medium							
12	The system provides the ability to save to external media the programming language used to create the user-defined report.	Low							
13	The system includes an end-user tool that is easy to use and powerful in its capabilities. The tool must be totally integrated with the application and the commercial database proposed.	High							
14	The system includes a report writer that is graphical not text or script based; SQL alone is not an acceptable method.	High							
15	The system provides for context-sensitive help features throughout as well as an online manual.	High							
16	The system provides for automatic joining of tables with related data without any programming.	High							
17	The system allows users to create look up queries and reports without knowing any programming language.	High							
18	The system allows report definitions to be saved and used again, modified or copied and changed.	Medium							
19	The system provides for sorting of rows in multiple orders.	High							
20	The system provides for the easy design of mailing labels. The students included should be able to be based on criteria from any field or flag and sorted by any field.	High							
21	The system includes reports that are easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report) and exported to a file such as word documents, spreadsheets, email, faxes, or transferred to an ASCII format, with fixed-width fields, for loading into another package or tool. Reports can also be produced in a PDF format so they may be viewed via Adobe Acrobat.	High							
22	All reports in the system have extensive flexibility in the order the standard report information appears.	High							
23	All reports should have similar front-end questions prior to producing the report.	High							
24	The system queries and reports must be able to be produced based on conditions such as =, >, <,>,<=, in between values, and net values.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
25	The system allows the search and sort on any and all data fields (ex. name, student ID, grade, bilingual students, etc.)	High							
26	The system allows for searching using a combination of criteria (i.e. perform search based on student name AND birth date).	High							
27	The system allows searching using wild card or partial input (i.e. input XXX% to search for XXX XXXXXX).	High							
28	The system provides for the selection and grouping of report data by any field with sub-totals and sort orders.	High							
29	The system allows for user-defined on-screen prompts and selection criteria when generating reports.	Medium							
30	The system allows for defining reports that can be run at predefined intervals, or calendar dates in the future.	High							
31	The system allows users to save standard report definitions and reprocess those requests for future reporting.	High							
32	The system allows a user to be able to utilize a standard report definition that has been defined by another user as long as security access is maintained.	Medium							
33	The system prints barcodes and pre-printed forms (e.g. address labels, bubble sheets, student IDs, schedule cards, transcripts etc.).	High							
34	The system includes a data dictionary (i.e. list of fields with definition and data relationships if applicable) that is accessible by the end user in a format that is easily understood by a non-technical person.	High							
35	The system supports printing to a network connected printer, or a locally connected printer.	Medium							
36	The system allows for sending reports and documents via email as an integrated component of the system.	High							
37	The system support report writing including a variety of standard arithmetic and statistical functions such as sum, average, minimum, midpoint, maximum, percentage, etc.	High							
38	The system allows for district-wide or school-specific reports to be generated.	High							
39	The system allows the user to be able to print screens, allow the use of printers attached to PC workstations, and allow multiple printer access for all users.	High							
40	The system supports distinct levels of security for data mining and reporting can be defined for different levels and types of users throughout the district.	High							
41	The system is designed to allow reporting and querying functions as multi-user and these tools do not cause record contention issues for other users.	High							
42	The system includes security where only users with the proper security are allowed access to certain protected confidential fields such as the student and teacher social security number, the student state id and prior state id, student economic status, etc.	High							
43	The system supports the definition of routing or distribution lists as a part of the report definition. And then documents are sent electronically according to defined routing lists.	Medium							
44	The report writer has no user, developer, or license limitations.	High							
45	The system allows only authorized users to be able to define reports and initiate their production.	High							
47	The system includes the ability to have summary and detail data on a report, with both drill-down and roll-up capabilities (i.e. students, Teacher, school, district, etc.). Also build reporting relationships specific to or across entities.	High							
48	The system provides integrated wizards for creating graphs and charts.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
49	The application allows the user to customize standard reports with different selections, includes/excludes and sort sequences.	High							
50	The system allows the user with proper security to be able to lock defined report parameters so that it may not be changed by others.	High							
51	The system provides the user with a list of only the reports they are authorized to run.	High							
52	The system allows for the printing and designing forms in multi-language (Spanish, Vietnamese, etc.).	High							
53	The system has the ability to add notes electronically to reports.	High							
54	The system allows for free-form text searching.	Medium							
55	The system allows for search definitions be stored.	Medium							
56	The system allows for controlling the number of copies made of a report.	Low							
57	The system allows the user to designate the job start time for reports.	Medium							
58	The system allows the user to specify the priority of reporting.	Medium							
60	The system allows reports to be run in the background.	Medium							
61	The system provides a reporting tool that produces line graphs, bar charts, pie charts, scatter charts, etc.	High							
62	The system provides a reporting tool that can toggle between chart and supporting data.	High							
63	The system allows end-user defined formulas to be included in reports.	High							
64	The system allows the formatting of dates in reports by the end-user.	High							
65	The system allows the end-user to define a report's sort order.	High							
66	The system allows the end-user to change a report's sort order at report run time.	High							
67	The system allows the end-user defined sort definitions be stored and reused.	High							
68	The system allows the end-user to share stored report definitions only with other end-users who have the proper security.	Medium							
70	The system provides mail merge capabilities.	High							
71	The system includes native Online Analytical Processing (OLAP) capabilities	High							
72	The system includes a web-based data mining application for advanced analysis of data to the individual record level.	High							
73	The system allows data mining techniques such as a simple drag and drop interface to allow non-technical users to disaggregate, manipulate and analyze data.	High							
74	The system provides a report at the school level of Daily Attendance.	High							
75	The system provides a report at the school level of Bus rolls.	High							
76	The system provides a report at the school level of Discipline Reports.	High							
77	The system provides a report at the school level of Condensed Schedules	High							
78	The system provides a report at the school level of Student Data Verifications	High							
79	The system provides a report at the school level of Teacher Utilization	High							
80	The system provides a report at the school level of Room Utilization	High							
81	The system provides a report at the school level of Attendance Summary - Excused/Unexcused Absences	High							
82	The system provides a report at the school level of Enrollment Verification Report	High							
83	The system provides a report at the school level of Student Schedules	High							
84	The system provides a report at the school level of Student Labels	High							
85	The system provides a report at the school level of Class Lists	High							
86	The system provides a report at the school level of Master Course Lists	High							
87	The system provides a report at the school level of Graduation Requirements.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
88	The system provides a report at the school level of Honor Roll/Principal Honor Roll	High							
89	The system provides a report at the school level of Class Ranking	High							
90	The system provides a report at the school level of Proficiency List	High							
91	The system provides a report at the school level of Revoke License	Low							
92	The system provides a report at the school level of Credits Scheduled Assessment	High							
93	The system provides a report at the school level of Student Demographic Sheets	High							
94	The system provides a report at the school level of Perfect Attendance List	High							
95	The system provides a report at the school level of Teacher Demographic Sheets	High							
96	The system provides a report at the school level of Vocational class lists	Medium							
97	The system provides a report at the school level of Vocational student lists	Medium							
98	The system provides a report at the school level of Contact Lists	High							
99	The system provides a report at the school level of Demographic, schedule, grades printout	High							
100	The system provides an Administrator's dashboard with summary NCLB statistics.	High							
101	The system allows the user the ability to select the metrics they want to monitor on their dashboard.	High							
102	The systems dashboard metrics can be selected from attendance, discipline, enrollment, calendar information, test scores, and at risk students.	High							
103	The system allows the user to select thresholds that will change the color of the dashboard warning graphic colored coded (i.e., to green, yellow, or red) depending on the value.	High							
104	The system allows the creation of an At-risk student dashboard that can indicate the number of students failing a course, the number of seniors without enough credits to graduate, the number of students failing courses needed to graduate, and the number of students who didn't graduate last year.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides for real time class rosters including transferred student in the teacher gradebook.	High							
2	The system provides the ability for Student demographic data to include contact information to be accessed real time. Changes made in the Main SIS should be seen immediately in the teacher attendance/gradebook	High							
3	The system provides the ability to sort roster information by a variety of fields such as name, gender, ethnicity, secret name, or student number or random.	Medium							
4	The system provides the ability for creation of various customized seating charts for each class allowing for flexibility on the room arrangement	High							
5	The system provides the ability for teachers to take daily/period attendance using the grade book and be integrated into the SIS real-time.	High							
6	The system provides the ability to take daily/period attendance using the seating chart	High							
7	The system allows for generation of elementary standards-based report cards	High							
8	The system shall bin integrated real-time with main SIS for Report Card and Progress Report grades and comments	High							
9	The system provides the ability to create and define grading categories.	High							
10	The system provides the ability to create and define assignments (i.e. name, weight, category, due date, notes).	High							
11	The system provides the ability to copy multiple assignments to multiple class files.	High							
12	The system provides the ability to create special scores for assignments with definition of value (i.e. NHI = Not Handed In).	High							
13	The system provides the ability to create, define, and enter extra credit scores.	High							
14	The system provides for the entry of letter or numeric scores by mouse and keyboard(tab/shift/cursor keys) and 10 key entry	High							
15	The system provides for Auto-fill scores (i.e. assign same grade to an entire class of students)	High							
16	The system provides the ability to copy student assignments with scores to another class file (if student transfers classes).	High							
17	The system provides the ability for identification of missing or incomplete assignments.	High							
18	The system provides for the entry of alternative grade (manual grade override) for reporting period.	High							
19	The system provides for the selection of multiple standard comments selected from a drop-down list per student, per class, per grading period for integration into standard progress or report card.	High							
20	The system provides for the entry of narrative comments per student, per class, per grading period for integration into standard progress or report card.	High							
21	The system provides for the assignment of same standard or narrative comments to multiple students for integration into standard progress or report card.	Medium							
22	The system provides for automatic transfer for the reporting period to include grade, conduct, parent conference information, and all information required for reporting purposes from the gradebook directly into the main SIS system.	High							
23	The system provides for designation of different reporting periods within same class file.	High							
24	The system provides for score display as letter grade, code, percentage and/or raw numeric score.	High							
25	The system provides for individual teacher formatting preferences (i.e. font, column width, etc.)	Low							

26	The system provides reporting period and overall grade summary columns.	High							
27	The system provides for entry of individual student general notes for viewing by the teacher and shared with any teacher the student has and administrators(not comments for reporting to parents).	High							
28	The system provides for entry of individual student assignment notes for viewing by the teacher only (not comments for reporting to parents).	Medium							
29	The system provides for entry of a note for entire class for viewing by the teacher only (not comments for reporting to parents).	Low							
30	The system provides for the generation of standard teacher gradebook reports such as an individual student grade report with assignment details.	High							
31	The system provides for the generation of standard teacher gradebook reports such as a class grade report with assignment details.	High							
32	The system provides for the generation of standard teacher gradebook reports such as an assignment list report.	High							
33	The system provides for the generation of standard teacher gradebook reports such as a missing assignments report.	High							
34	The system provides for the generation of standard teacher gradebook reports such as a list of student birthdays.	High							
35	The system provides for the generation of standard teacher gradebook reports such as an emergency contact list with all telephone numbers and contact information.	High							
36	The system provides for the generation of standard teacher gradebook reports such as a class list with a blank grid with free text column headers.	High							
37	The system provides for the generation of standard teacher gradebook reports such as a user defined failure list by assignment and by class.	High							
38	The system provides for the generation of standard teacher gradebook reports such as a bulletin board postings.	Medium							
39	The system provides the ability for teacher grade analysis for individual assignments such as class average with the ability to determine when parents see the information.	High							
40	The system provides for automatic transfer of the assignment details and scores from the gradebook directly into the parent portal. Parent portal and gradebook must be integrated.	High							
41	The system provides for secure access for teachers and administrators	High							
42	The system provides access to all teachers assigned to a class in the master schedule.	High							
43	The system provides for emailing missing assignments, progress reports and D's and F's sent to parents by individual student or by class. When sending individual emails, it should automatically launch Outlook	High							
44	The system provides the ability to view on one screen what has been posted for the parent to view.	High							
45	The system provides the ability to create special teams such as coaching	High							
46	The system provides the ability to print missing assignments by individual student, for all classes at once and for every class such as math, science, social studies, etc.	High							
47	The system provides color coding for exemption, late, missing, below teacher defined threshold, color codes by assignment category.	High							
48	The system provides the ability to graph assignments by student or class.	High							
49	The system provides the ability to have teacher defined categories for assignments to allow sorting, printing etc.	High							
50	The system provides for sorting of assignments by date, category, etc.	High							
51	The view for Parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view)	High							
52	The system provides the ability for teachers to view, print etc., rosters using students "preferred" first name	High							
53	The system provides a web site that teachers can login to keep track of classroom discipline.	High							

54	The system allows the teacher to be able to enter classroom discipline events for managing daily classroom discipline only which the teacher has the option to share.	Low							
57	The system has the ability to exempt students from assignments.	High							
58	The system provides a messaging system to allow teachers to email parents by class or student with a click of the mouse (not have to enter email address)	High							
59	The system is integrated with the gradebook/attendance with other messaging systems such as School Messenger.	High							
60	The system is integrated with teacher websites in programs such as School Center?	High							
61	A "chat" or "blog" or "daily alert" feature, in which teachers can collaborate with other teachers a student has, about the student. For example, if a student has had a death in the family the previous evening, we need to be able to make a quick pop up for other teachers of the student in their roster screen	High							
62	The system displays alerts for all students as the teacher views a class list without having to scroll or "touch" each student. "Smart" alerts are defined as having some indicator by icon or color that indicate that the alert is either medical, SPED, 540 Plan, parent alert, etc. The alerts must be able to indicate multiple alerts for an individual student.	High							
63	The system has an attendance screen that displays all students from an average size class without scrolling.	High							
64	The system provides an attendance report for teachers for one student or a class of students for any date range within the school year.	High							
65	The system allows for an easy setup of teacher preferences. Preferences are defined as the linking of classes together so that assignments only have to be created once and can then be copied to other classes in the preference. The preference also sets the weights for the classes, the assignments types to be used and the learning targets to be used in preparing assignments.	High							
66	The system allows for multiple teacher preferences to be setup rather than entire gradebook.	High							
67	The system provides for teacher preferences to include total points (the total number of points earned divided by total possible) vs. weighted percentages (each assignment is converted to a percentage grade and is the percentage is used in calculating the average)	High							
68	The system provides for teacher preferences to include weighted assignments types	High							
69	The system provides for teacher preferences to include weighted units of study (which are the objectives for the particular area of study)	High							
70	The system provides for teacher preferences to include report cycle weights	High							
71	The system allows for the optional transferring of assignments, attendance, and grades when a student transfers to another class with the same teacher.	High							
72	The system allows for a choice of either rounding or truncating when posting a report card grade.	High							
73	The system allows the teacher to use report cycle weights (each reporting period has a weight) rather than cumulative (where the grades are continuous through the length of the class) , the gradebook as well as the parent portal should display the average that represents the current report cycle as well as the average that is being earned for the entire semester.	High							
74	The system automatically exempts any assignment prior to the time a student enters the class.	High							
75	The system has a process that posts the student average with the alpha conversion from the gradebook to the report card at the end of each report cycle. This grade will be stored with the course and the final grade will be moved to credit details (the areas of the system that stores courses that have final grades) at the end of the year. This process should be completed with a minimum amount of "clicks".	High							
76	The gradebook provides for the capability to move a student to the bottom of the column in the gradebook when a student drops the class or a toggle to hide withdrawn or dropped students.	High							

77	The system provides teacher reports including, but not limited to Class lists, class list with a grid for entering information, birthday lists, a failures report based on teacher defined criteria, a missing assignment report, an emergency list for the class of all parent/guardian contact information, a medical report of allergies, individual student progress reports listing all assignments and grades for a specific period of time, and student schedules and mailing labels.	High							
78	The system allows the teacher that teaches at multiple buildings, to be able to switch buildings without having to log out of the system.	High							
	The system allows teachers to view for their students								
79	The system allows teachers to view for their students Demographic - address, phone number(s), language spoken at home.	High							
80	The system allows teachers to view for their students emergency contact information.	High							
81	The system allows teachers to view for their students basic medical - life threatening and allergies information.	High							
82	The system allows teachers to view for their students class schedules.	High							
83	The system allows teachers to view for their students standardized test results.	High							
84	The system allows teachers to view for their students Transcript.								
85	The system allows teachers to view for their students attendance from previous years.	High							
86	The system has the option at the end of the semester to select specific students for posting of final grades without having to post the entire class. This comes into play particularly at the end of the year when the seniors graduate early and grades need to be posted to determine graduation but there are juniors in the class who have additional time to complete assignments and take finals.	High							
87	The system provides for teachers gradebook to be automatically archived at the end of the year for all classes taught throughout the year.	High							
88	The system allows for schools to have the option to allow teachers to enter attendance reasons.	High							
90	The system allows a spreadsheet format for entering grades using tab and shift tab to go across and the enter key to go down as well as the arrow/cursor keys.	High							
91	The system has the ability to import raw assessment data.	High							
92	The system has the ability to attach three or more of any media type to an assignment.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides parent and students access to assignments and assignment grades by class or date range.	High							
2	The system shall display a list of the student's current classes with their current and cumulative average.	High							
3	The system supports teacher options around grade calculation (empty counts as zero or exempt, weights, etc.) shall be clearly displayed in the parent/student portal in an intuitive manner. All necessary information should be provided to calculate and arrive at the same final grade as displayed.	High							
4	The system provides the ability to link to teacher's website (School Center) to view assignments, instructions, etc. (i.e. a free form URL text field for the teachers)	High							
5	The system allows the teachers control over when the parents see specific assignments and their associated grades	High							
6	The system should have teacher selected indicators on assignments such as "assignment has not been graded", "assignment has been handed in"	High							
7	The system should have a noise notification (set by user preference option) when parent enters system alerting for missing assignments, low grades, etc.	High							
8	The system shall be fully ADA compliant/accessible (i.e. screen reader compatible)	High							
9	The system provides parent and students access to Pay Required/Optional Fees Online. Once a required fee has been paid, it should not be available to pay again.	High							
10	The system shall have the ability to view fee payment history including detail of which fees were paid	High							
11	The system provides for viewing of lunch balance, lunch history and payment on lunch account through integration with a third party POS.	High							
12	The system shall be fully PCI compliant in regards to fee/lunch payments. System should not handle the credit card number directly.	High							
13	The system should provide parents with a payment plan option (as part of a fee payment system)	Medium							
14	The system provides parent and students access to Attendance including date and reason by date range or by class.	High							
15	Allow multiple logins to be associated with the same student to provide for split-household situations	High							
16	Provide the district the option to allow parents to report absences and associated reasons through system	High							
17	Provide the district with the option to post announcements to parent and students	Low							
18	Allow for parents to have a single login to access all of their assigned students	High							
19	The system should allow the option to provide sign-on verification for other systems (i.e. a web service or database procedure which will accept a username and password and return success/failure).	High							
20	The system must have the ability for parents and students to reset a forgotten password by e-mail (using a GUID-based URL or something similar)	High							
21	The system must store all passwords in a secure manner (i.e. one-way, salted encryption)	High							
22	The system must allow parents/students to update sms/email/phone contact information and specify contact preferences for different categories of messages (i.e. attendance notifications by SMS, grade alerts by e-mail, etc)	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
23	The system provides parent and students the ability to request courses for the following year during a time frame defined by/per school	High							
24	The system provides parent and students access to the student's medical Information. This needs to be configurable to allow the district to determine which medical information should be accessible	High							
25	The system provides parent and students access and ability to print a parent friendly version of the student's current schedule	High							
26	The system provides parent and students access and ability to print an unofficial copy of the student's transcript	High							
27	The system provides parent and students access and ability to print the student's report card	High							
28	The system allows the update of Demographic and Emergency Contact Information via the parent portal that includes an approval process by the affected school registrar.	High							
29	The system should provide parents and students the student's teachers' and counselor email addresses with the option of an in-site e-mail form which generates an e-mail to that recipient.	High							
30	The view for parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view)	High							
31	The system should allow for the district to display standardized test scores and percentiles. The district should have the flexibility to determine which tests are viewed by parents	High							
32	The system should provide an option to allow students/parents to view and update the student's 4 year course plan	High							
33	The system has the option to have course requests populated from a student's 4 year course plan.	High							
34	The system should provide for the ability for the district to add additional screens/options/data fields	High							
35	The system has the ability for parents to self-select threshold/event e-mail alerts (i.e. when Sarah's grade in math drops below a C, when Johnny is tardy to a class, etc.)	High							
36	The system provides parent and students a view of met diploma requirements. Views should include where the student is currently, will be at the completion of current courses, and based on course requests for next year.	High							
37	The system allows the district the ability to integrate with an external course application/LMS (i.e. Blackboard)	High							
38	The system allows for parents to sign themselves up for access to the parent portal. This would be approved by the school of their oldest child	High							
39	The system allows for the parent to request additional students added to their account	High							
40	The system allows the parent to request a transfer of their student to another BV school	High							
41	The system provides all documents for a parent to register a new student, with workflow to the appropriate people for approval	High							
42	The system has the flexibility to enable/disable portal features (i.e. course registration, assignments, etc) by school	High							
43	The system should track the number of times parents have accessed the parent portal information and log this information to be viewed by administrators, counselor and teachers.	High							
44	The system provides the display of the non school days for the year.	High							
45	The system provides support for student portfolios for both electronic and scanned artifacts.	Medium							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
46	The system allows for the electronic tracking of notices, flyers, etc. that used to be sent home with the student (picture day reminders, music programs, etc)	Medium							
47	The system includes the ability to add custom menu links to the parent/student portal that link to district applications.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	State Reporting Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the necessary data structures and data elements necessary to produce the Washington state reports.	High							
2	The system provides auditing reports to support the aggregate numbers associated with each state report.	High							
3	The system provides exception reports detailing each student who is not included in each state report.	High							
4	The system allows overrides of student data to accommodate discrepancies in detail data.	High							
5	The system provides for electronic transfer of state report information to the state department of education per the reporting requirements.	High							
6	The system provides a state grade level equivalent value for each district defined grade level.	High							
7	The system provides the ability to define a state equivalent to each code/description value available in the system.	High							
8	The system includes a field for tracking whether or not the student is Hispanic, and if Hispanic which specific Hispanic culture based upon a list defined by the district.	High							
9	The system includes a field for tracking the students Race code. This district defined list of race codes is cross-walked to a Federal code of Race.	High							
10	The system includes a field that is automatically populated whenever the Federal Race and Ethnicity fields are modified. This field is a composite of these two fields, typically referred to as a Federal Race and Ethnicity code.	High							
11	The system provides the P-223, Monthly Report of School District Enrollment Eligible for Basic Support.	High							
12	The system provides the P-223H, Monthly Report of School District Special Education Enrollment.	High							
13	The system provides the P-240, Monthly Attendance Report of Ancillary Services to Part-Time Students Eligible for Basic Support.	High							
14	The system provides the P-210, Public High School Enrollment Status.	High							
15	The system provides the DOH348-002a, Required School Immunization Status Report.	High							
16	The system provides the M-873, Scoliosis/Kyphosis Screening Report.	High							
17	The system provides the M-765A, Traffic Safety Education Certificate report.	High							
18	The system provides the 1503 Washington State Standardized High School Transcript report.	High							
19	The system provides the 1094E Learning Assistance Program End of Year Report.	High							
20	The system provides the 1094ES Learning Assistance Program End of Year Summer School Report.	High							
21	The system provides the OMB 1810-0503 Annual Performance Report Title IX Indian Education Formula report.	High							
22	The system provides the OMB 1870-0500 Civil Rights Compliance Report.	High							
23	The system provides the P223S Nonstandard School Year AAFTE Enrollment Eligible for Basic Support Report.	High							
24	The system provides the Office of Civil Rights Data report.	High							
25	The system provides an extract file compatible with the CEDARS OSPI system, compliant with the 2013-2014 school year.	High							
26	The system provides a report of Alternative Learning Student populations	High							

Response Instructions to Functional Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	~~Requirement will be met through changes to the existing reports or programs. This would include custom code developed~~ to perform specific functions or validations outside the standard code. Include the creation of a new report, query of workflow that does not exist within the current solution. Note: In the Comments column next to this response, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Modification	M	~~Requirement will be met through changes to the source code which would require analysis and re-application during future~~ updates, upgrades, or when applying software patches.
Supplied by Third Party	3	~~Requirement will be met by third party software package and is included in the proposal.~~ Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.
Note:		
1. An omitted response will be assumed to be the same as a response code of "N". 2. Any deviation from the response codes will be re-coded at the discretion of NSD. 3. In this Worksheet there are 4 Tabs. Each must be completed with codes above. 1 Data Integration & Migration 2 Technical Infrastructure 3 Third Party Integration 4 Training & Support		

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Data Integration & Migration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires. The tests should include but is not limited to standardized test scores such as Washington Assessment of Student Learning (WASL), Measures of Academic Progress (MAP), High School Proficiency Exam (HSPE), PSAT, SAT, etc.	High							
2	For each test given, the system tracks the test, form, level, multiple sub-tests and the number of items in the test that relate to each sub-test.	Low							
3	The system allows for standardized tests to be imported from data files supplied by outside sources into the application.	High							
4	The system should be able to import raw test data from other sources.	High							
5	The student's main record must track all the tests taken over time, whether they are standard tests, school tests or district tests.	High							
6	For each test tracked, the test name, date it was administered, and the score must be recorded.	High							
7	The test scores recorded must be able to be stored in the formats provided (e.g. .csv, .dat)	Low							
8	The system provides an item analysis report or display.	High							
9	The system provides a student response analysis report.	High							
10	The system provides a school summary of responses for any given test.	High							
11	The system provides statistical reports that include mean, median, standard variance, standard error, and minimum/maximum scores.	High							
12	The system maintains an ongoing test and assessment history for each student in the district in the data warehouse.	High							
13	The system supports national, state and local district-defined test definitions.	High							
14	System should be able to support FAFSA forms tracking.	High							
15	The system allows external records, e.g., health records should be able to be attached to a students record within the system.	High							
16	The system allows test scores to be hand-keyed or may be mass imported from data files and the system provides for easy resolution to identify import errors and correct them.	High							
17	The system supports an unlimited number of tests and subtests across all school years for each	High							
18	The sytem supports test scores that are either alpha or numeric.	High							
19	The system allows the district to define which tests are printed on the transcript (e.g., first SAT, last SAT, best SAT, etc.).	High							
20	The system provides for ability to create pre-coding file for state assessments.	Medium							
21	The system provides an efficient method for reporting on testing data for specific groups of students including student's age, grade, building at the time the test was taken and including data from other modules such as Demographics, Special Programs, etc.	High							
22	The Test History Report can be run in a variety of ways, allowing users to select which information is included in the report. The user should be able to run the report by test or by student and should be able to include/exclude subtest score information, tracking information, demographic information, etc.	High							
23	The system allows for standards and indicators to be imported from the state website or from the district's curriculum mapping system	High							
24	The system allows all common score type fields including but not limited to: raw score, percentage, % scaled, standard deviation, normed score, number of items correct and local district-defined score types.	High							
25	The system provides ability to copy test definitions.	High							

26	Allow for user-friendly modifications, for users with the proper security, to test definitions as assessment requirements change or a new test is developed.	High							
27	The system provides online access by parents and teachers to test scores.	High							
28	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires.	High							
29	The system provides the ability to track multiple attempts at the same tests.	High							
30	Text describing a test and subtest or its administration may be entered.	Medium							
31	The authorized user may export data to statistical packages, such as SPSS, through flat ASCII data files, via the Report Writer.	High							
32	The system provides analysis improvement/progression for students and programs. The system should facilitate analysis for a single student, grade, school, cluster, program, or English proficiency category. The system should facilitate analysis by comparing different tests.	High							
33	The authorized user may view and maintain the test results by student and by test, including the associated tracking data.	High							
34	The system enables online access to syllabus and assignments.	Low							
35	When a test is added for a student, the system stores the student's age, grade, and building at the time the test was taken.	High							
36	The system supports setting exclusion flags on students who may be excluded from having to pass a course or test.	Low							
37	The system allows alternate test flags.	High							
38	The system allows test exemptions.	Low							
39	The system allows parent waivers.	Low							
40	The system allows ability to show test scores for similar tests from year to year for a student.	High							
41	The system allows ability to perform cohort group multi-year test history reporting.	High							
42	The system provides the ability to create test results by class to send to teachers.	High							
43	The system provides the ability to view classroom average test scores.	Medium							
44	The system supports tracking test data down to the detailed test question level (for each test question, Track associated objectives, Student Expectations, Answer Key, Student answer, student score, etc.)	Medium							
45	The system supports summarized test data down to the Student Expectation level (student progress towards competency of each SE and/or Objective, Student mastery of each test, etc.)	Medium							
46	The system allows data mining and advanced OLAP analysis of test score information incorporating user-defined criteria and database elements.	Medium							
47	All user defined report generation capabilities should be intuitive and easy to use.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement						
#	Technical Infrastructure Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system utilizes industry standard RDBMS platform which supports ANSI-SQL and ODBC connectivity Preferred (in order of preference): MySQL 5.6, PostgreSQL 9, MariaDB 10, SQL Server 2008 R2, Oracle 11g, or later versions of any	High							
2	The district will have root access to all database content.	High							
3	The system allows the customer be able to create custom tables, views, triggers, and stored procedures.								
4	The system is designed to allow the customer be able to create custom tables, views, triggers, and stored procedures so that these custom modifications are not impacted or otherwise affected by vendor provided patches, updates, and upgrades.	High							
5	The system has ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High							
6	Customer will be able to develop their own custom screens and reports. Vendor provided patches, updates, and upgrades will not delete, overwrite, or otherwise damage customer developed content, reports, and screens.								
7	The development environment or tools for creating custom reports and screens must be non-proprietary.	High							
8	The system software application and database servers run on industry standard 64-bit Operating systems running in VMware vSphere 5 or later. Preferred: Debian Linux, Ubuntu Linux, Redhat Linux, Windows Server 2012 or later releases	High							
9	The system software supports the most current release of the development environment recommended by the vendor.	High							
10	All application functionality for end users is available on current stable releases of Mac OS X and Windows and on at least three of the following web browsers: InternetExplorer, Safari, Firefox, Chrome	High							
11	The system does not use Java or Flash applets as any part of the end user interface.	High							
12	Areas of the system intended to be accessed by teachers, students, and parents will be accessible through a web browser or a custom client on iOS 6, Android 4.2, or later releases of each. The system supports these browser's latest release within 6 months of final release date								
13	List any browser plug-ins required or recommended for use by the system including what area of the site uses them and the oldest versions of the modules that are supported by the system.	High							
14	The vendor supplies customer with data diagrams detailing all tables, columns, relationships, indexes, triggers, and stored procedures.	High							
15	Describe how Customer will be able to run test, development, and training instances of the system on their network. Will those instances require additional licenses?	High							
16	The system allows for transactional backups during the day to assist in near time of failure recoveries.	High							
17	If the system sends or receives email messages directly, it will use SMTP and/or IMAP. The system will not run its own mail service. If it uses SMTP, it will support SMTP authentication and TLS.	High							
18	System does not require continual vendor access for operation.	High							
19	System doesnot require that any ports other than ports for secure web access be exposed outside of the Customer network	High							
20	All vendor access to the Customer implementation of the system will be through secure, encrypted communication protocols such as ssh and sftp	High							

21	All server access will be controlled by the Customer. Vendor will not retain root access to the system or have any "backdoor" access into the system unless specifically allowed by the Customer.	High							
22	The vendor has a recommended method for backup up the system (application files and databases) and the method for restoring the system from a backup. Pleae provide these details.	High							
23	Describe the recommended hardware configuration for your solution given a district of 30,000 students and 2,500 staff	High							
24	The vendor provides a simple graphic of the hardware architecture (including at a minimum database servers, application servers, and load balancers if applicable).	High							
25	Will Customer be able to create custom tables, views, triggers, and stored procedures? How will these be maintained across vendor provided patches, updates, and upgrades?	High							
26	System has the ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Third Party Integration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	What existing interfaces and protocols are available for data integration with other systems?	High							
2	What security is provided in the system to restrict the import and export capabilities to only authorized users?	High							
3	The system allows user-specified data for all students, enrolled and withdrawn, from “current” and “prior” school years can be automatically exported/downloaded in a variety of common formats, such as flat file with fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High							
4	The system allows user-specified data for all students, enrolled and withdrawn, for the “current” school year as well as teacher information can be automatically imported or uploaded at regularly scheduled intervals (e.g., hourly, daily, etc.) without any human interaction from the third party software.	High							
5	The system allows user-specified data for all students, enrolled and withdrawn, for “current” school year can be automatically imported/uploaded from files in a variety of common formats, such as flat file with fixed-width fields, .CSV, MS Excel, pipe-delimited.	High							
6	The system allows during data import, for the system to validate data integrity and produce update/rejection reports and files.	High							
7	The system includes real-time data import and export utilities with support for a wide range of industry-standard formats, including fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High							
8	The system imports test results for tests including, but not limited to State Assessments, SAT, and ACT.	High							
9	The system is able to create extract records as required by the state department of education.	High							
10		High							
11		High							
12		High							
13		High							
14									
15									
16	What methods are available for uploading student/staff/parent photos in bulk? Can it be done through the application web interface? Can uploads be done by school staff?	High							
17	What ability will the Customer have to change the look and feel of the web interface by modifying graphics, html, or css?	High							
18		High							

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The vendor provides accurate and complete training materials for the proposed version of the software. They will have knowledgeable trainers readily available for on-site sessions with end-users, as well as availability of web-delivered/distance learning training. If an assigned trainer is replaced, the replacement should be of equal or better experience.	High							
2	The vendor provides an extensive and high-quality training program. The student information system will affect virtually all departments and functions in the school district; therefore all staff members will require some level of training. The vendor must work closely with the district to develop a training plan designed to bring comprehensive SIS instruction to the district staff, all end users, technical support staff, system administrators, and district training team. The training needs to be specific to the operational rules of the district and to the tasks required of the end users. The vendor must have experience in training people with varying level of computer proficiency.	High							
3	The vendor provides training materials for full implementation. The district will be given the right to reproduce all training materials as needed. Materials shall include practice exercises, "cookbook-type" fast reference guides, and training manuals.	High							
4	The training materials provided by the vendor are distributed in a widely used editable format, such as Microsoft Word, Power Point, or PDF.								
5	The vendor will train the district's technical staff. Vendor must specify what core knowledge/skills will be required for the technical staff. The vendor shall perform on-site training and consulting services for the district's technical/support staff during the implementation and transition to the new SIS software system. The vendor must include in their proposal a plan for how this knowledge transfer will occur, and identify the roles that the district will assume once the knowledge transfer is complete. If any of these roles requires advance knowledge or certification before the knowledge transfer can occur, this must be noted in the proposal.	High							
6	All training supplied by the vendor will be conducted at the district's facilities and via a web-based training. The vendor must provide training options that are available for the proposed system including recommendations for "best practices" approach. The vendor shall also specify what training a third-party supplier may provide. Vendor must indicate what training is viable for a train the trainer approach.	High							
7	The vendor supplies and promotes continuous training of the application software on a periodic basis.	High							
8	The vendor provides training in the use of the report writing tool for the group of users authorized to use the tool.	High							
9	The vendor provides up-to-date, accurate, extensive, online, and searchable documentation identifying step-by-step procedures for completing tasks and activities. In addition, District will require documentation for any customizations or configurations that are done. District would like the ability to edit documentation in order to customize for their business rules.	High							
10	The vendor provides a sample of user documentation that would be delivered with the application software.	High							
11	The vendor provides manuals and documentation in PDF format.	High							
12	The vendor supplies manuals and documentation in a format that can be edited by the District, allowing the District to customize the documentation for their users.								
13	The vendor allows the district authorization to print unlimited additional copies of user documentation.	High							

14	The system will be accompanied by written and online user manuals and other system support documentation in electronic format. The application provides for extensive documentation identifying end user step by step procedures for completing tasks and activities as well as technical documentation	High							
15	The vendor provide will provide on-site installation and implementation of the software. Please provide information on procedures for installation and implementation of software.	High							
16	The on-site support provided by the vendor will be for an agreed upon period of time after product implementation is completed.	High							
17	The vendor offers service and support options including:	High							
18	The vendor offers service and support options including 7 X 24 phone support for critical, production-halt situations.	High							
19	The vendor offers service and support options including on-site or dial-in response within two business hours for production-halt situations.	High							
20	The vendor offers service and support options including 7 X 12 phone support for non-production-halt situations.	High							
21	The vendor offers service and support options including on-site customization and trouble-shooting during implementation.	High							
22	The system is integrated with Internet services that allow users to access Help desk services via the Internet and phone calls to ask questions related to the software, inquire about the status of current calls, and to receive software and documentation updates automatically after software implementation is complete.	High							
23	The vendor has an adequate number of support phone lines and the necessary staff to handle calls.	High							
24	The system allows for remote dial-up as well as transmitting or receiving software or data to and from the district's system.	High							
25	The vendor provides an outline of their formal problem resolution management procedure, escalation procedure, service level agreement, etc.	High							
26	The vendor has a method for prioritizing support cases for resolution, i.e. functional problem, user down, system down, etc.	High							
27	The vendor provides prompt notification and explanation to the district's technical/support staff of discovered software failures or functional defects; and immediate release of documented software correction must be made upon problem resolution.	High							
28	The vendor guarantees the timely response to reports of software failures or functional defects discovered during normal use of the product. The vendor shall present its plan to address and correct the reported problem including needed resources, time, and cost (if not covered in contracted maintenance agreement).	High							
29	The vendor provides sufficient management, user, and technical/support staff training and documentation in the event that significant functional or technical changes are made to the installed software solution.	High							
30	In the event that the software product is to be moved from the existing hardware platform to a different platform, the vendor will provide consulting and/or technical assistance in the planning and execution of such a move.	High							
31	The vendor business plan includes the ability to submit regular routine requests for improvement or changes in future upgrades via a User Group Forum. This process includes user feedback for proposed changes to future upgrades.	High							
32	The vendor provides a software update service that furnishes regularly scheduled updates, annually and others as needed.	High							
33	The vendors software will always be updated to support the latest version of all underlying components (operating systems, databases, browsers, etc.)	High							
34	The installation of software updates preserves the integrity of district-defined fields and web pages previously customized by the district.	High							
35	The system provides the capability to migrate easily to new software releases (updates) and automatically convert the database.	High							

36	The vendor provides advance copies of release notes that describe the changes that will be applied with a patch or version upgrade.	High							
37	The vendor supplies annual support subscriptions and includes, at no additional charge, software maintenance.	High							
38	The vendor supplies annual support subscriptions and includes, at no additional charge, software updates.	High							
39	The vendor supplies annual support subscriptions and includes, at no additional charge, normal changes to the district requirements and state department of education requirements.	High							
40	The vendor supplies annual support subscriptions and includes, at no additional charge, customer support website.	High							
41	The vendor supplies annual support subscriptions and includes, at no additional charge, weekly notifications by email.	High							
42	The vendor supplies annual support subscriptions and includes, at no additional charge, interactive on-line user groups.	High							
43	The vendor supplies annual support subscriptions and includes, at no additional charge, remote diagnostics and control capability by support technicians.	High							
44	The vendor supplies annual support subscriptions and includes, at no additional charge, unlimited toll-free telephone support.	High							
45	The vendor supplies annual support subscriptions and includes, at no additional charge, Fax line support.	High							
46	The vendor supplies annual support subscriptions and includes, at no additional charge, E-mail support.	High							
47	The vendor supplies annual support subscriptions and includes, at no additional charge, on-line searchable product Knowledge Base.	High							
48	The vendor supplies annual support subscriptions and includes, at no additional charge, FAQ online.	High							
49	The vendor limits annual support subscription cost increases to a range between 1% and 6% per year.	High							
50	The vendor provides a comprehensive maintenance plan for application software, hardware, and engineering services, including any updates.	High							
51	The vendor provides local on-site support.	High							
52	The vendor has the ability to provide for custom changes to standard code.	High							
53	The vendor supplies a description of the procedure by which the customer may request changes or enhancements.	High							
54	Prior to installation, the vendor must provide a detailed description of services to be rendered, together with a detailed schedule of events, to facilitate installation and start-up of the application software.	High							
55	What resources are available from the vendor to assist with the conversion of data from the previous Customer SIS?	High							
56	The vendor provides a description of the procedure for data conversion, including associated costs, from existing application software to the proposed vendor's system.	High							
57	The vendor provides information on the level of experience of all vendor employees who will be working on the data conversion from the previous SIS.	High							
58	The vendor assigns a single point of contact project manager during the migration from the legacy platform to the new platform.	High							
59	The vendor provides technical training to system administrators and technical developers and users.	High							
60	The vendor provides technical documentation to system administrators and technical developers and users.	High							

NSD Cost Workbook

Table of Contents

Bidder:	

Insert Bidder Name here.

Worksheet Title / Hyperlink	Description
A3-1. Total Cost Summary	Worksheet for Bidder to provide a summary of the total proposed costs.
A3-2. Software Costs	Worksheet for Bidder to provide one-time Software costs of the NSD solution.
A3-3. Hardware Costs	Worksheet for Bidder to itemize all one-time and ongoing hardware costs.
A3-4. DDI Services Costs	Worksheet for Bidder to provide one-time costs for Design, Development and Implementation of the NSD.
A3-5. Support Services Costs	Worksheet for Bidder to provide ongoing maintenance and operations (M&O) support costs.
A3-7 Payment Schedule	Worksheet for Bidder to describe the payment schedule.
A3-8. Pricing Assumptions	Worksheet for Bidder to provide Pricing Assumptions.
A3-9 Alternative Pricing	Worksheet for Bidder to provide alternative pricing structure (this is supplemental/additional for consideration after responding to requested format).
A3-10 Supplemental Cost Information	Please Complete this narrative Supplemental Cost Information Tab

PLEASE NOTE:

1. The Bidder's name should appear across all other worksheets.
2. Cells requiring Bidder data entry are marked in light-green highlight to clearly indicate which cells are available for data entry as indicated above left.
3. Cells that contain titles and formulas are marked in gray high-light.
4. Cells that are not applicable are marked black.
5. It is the Bidder's responsibility to ensure the integrity of the Cost Workbook formulas and links.

NSD Total Cost Summary	
One-time NSD Costs	
Software Costs (Form VII-2)	\$0
Hardware Costs (Form VII-3)	\$0
Design, Development and Implementation Services Costs (Form VII-4)	\$0
Interface Costs (Form VII-4)	\$0
Unanticipated Tasks: Bidder Implementation Costs (10% of implementation costs)	\$0
Total One-time Cost	\$0

	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	Total
M&O NSD Costs						
Software License Costs (Form VII-2)	\$0	\$0	\$0	\$0	\$0	\$0
Hardware Costs (Form VII-3)	\$0	\$0	\$0	\$0	\$0	\$0
Support Services Costs (Form VII-5)	\$0	\$0	\$0	\$0	\$0	\$0
Total M&O Cost	\$0	\$0	\$0	\$0	\$0	\$0

Total NSD Costs	\$0

- NOTES:
1. On all worksheets, the Bidder must not enter data into any field that is shaded grey.
 2. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
 3. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.

NSD Bidder Software Costs

Software Item Description and Specifications (Prior to System Acceptance)
Required SIS Software (included in module)
Required SIS Software (not included in module)
3rd Party Software
Optional Software
Tools and Utilities
System Software
Operating System
Other System Software
[Insert for each Software Component]
Subtotal

[illegible]

Software Item Description and Specifications - (Post System Acceptance)	
Software Component 1	
Software Component n	
:	
:	
[Repeat for each Software Component]	
	Subtotal

[illegible]

NOTES:

1. The Bidder shall describe all proposed software indicating manufacturer, brand name, module name and version number for the items being proposed.
2. An enterprise licenses is a single single software license for all enterprise users.
3. In addition to Enterprise licenses, the Bidder may propose different software license types for NSD consideration.
4. All costs associated with the purchase, delivery, installation, and production of the SSI software components shall be loaded into the Unit Cost column. The Bidder may provide an alternative costing approach based on cost drivers such as lease or usage, but shall still commit to a firm fixed annual cost.
5. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
6. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.
7. For Bidders proposing a any new development components for the SIS, costs associated with development shall be included in this worksheet.

NSD - Cost Proposal

Hardware Costs

0

Hardware Costs											
Hard-ware Item #	Hardware Item	Per Unit Cost	Quantity	#REF!	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	#REF!	#REF!
1	Item 1			\$0						\$0	\$0
2	Item 2			\$0						\$0	\$0
3	Item 3			\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
				\$0						\$0	\$0
Total Hardware				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Hardware Specifications					
Hard-ware Item #	Hardware Item	ment (e.g., Dev, Q1, Q2, Training, Stage,	Manu- facturer	Detailed Description (e.g., number of processors, amount and type of storage and memory, type of network card)	Operating System
1	Item 1				
2	Item 2				
3	Item 3				

Notes:

1. The Bidder shall describe all proposed hardware.
2. All costs associated with the purchase, delivery to the NSD-specified site, licenses (e.g., operating system) of the hardware shall be loaded into the Per U The Bidder shall be responsible for the risk of loss or damages that occur during delivery of the equipment.
3. Costs shall include all environments (e.g., development, testing, training, pre-production, and production).
4. The Bidder may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.

5. All hardware/software and associated warranty and maintenance documents may be purchased in NSD name. In such a case the Bidder must provide to documentation related to hardware/software purchases including, but not limited to invoices, packing slips, license agreements, and other details that may be for audit and accounting.
6. Hardware Items in the Hardware Costs table shall correspond to the Hardware Items in the Hardware Specifications table.

Earliest Proposed Purchase Date

nit Cost.

NSD all
e required

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)
Project Management and Planning	
Project Management Plan	
Communications Management Plan	
Project Charter	
Change Management Plan	
Weekly Written Progress Reports	
Monthly Status Reports	
Contract Close-out Action List and Deliverables	
<i>Project Management Execution Activities</i>	
Total Project Management Deliverables and Activities	0
Technical Environment Installation and Configuration	
Specifications for all necessary hardware, software and tools	
Technical Infrastructure Description (including hardware and system software and tools)	
Environment Configuration Manual	
Source code and object (executable) code	
<i>Technical Environment Installation and Configuration Activities</i>	
<i>Insert as proposed</i>	
Total Environment Installation and Configuration Deliverables and Activities	0
Business Process Change Management	
Business Process Management Plan	
<i>Business Process Management Activities and Outcomes</i>	
<i>Insert as proposed</i>	
Total Business Process Change Management Deliverables and Activities	0
Knowledge Transfer and Training	
Knowledge Transfer and Training Plan	
Training Documentation	
Training Course Outline	
Training Packages and Materials	
Training Manuals	
Updated Training Documentation	
<i>Knowledge Transfer and Training Activities</i>	
<i>Insert as proposed</i>	
Total Knowledge Transfer and Training Deliverables and Activities	0
System Development - Design, Configuration, Development and Customization	
Systems Engineering Management Plan	
Design and Development Plan (Software Development Plan)	
Business Continuity Plan	
Test Plan	
Testing Tools, Test Configurations, and Related Documentation	
Test Scripts, Test Results and Quality Reports	
Problem Resolution Management Plan	
Problem Resolution Tracking System	
<i>System Development Activities</i>	
<i>Insert as proposed</i>	
Total System Design, Development and Customization Deliverables and Activities	0

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)
System Installation and Implementation	
Implementation Plan	
Performance and Capacity Plan	
Operational Recovery Plan	
Interface Management Plan / Design Description	
Interfaces Outcomes	
Software Configuration Management Plan and System	
Requirements Management Plan	
Requirements Traceability Matrix	
On-site Implementation Support Plan	
Pre-Implementation Readiness Assessment	
Production Release Plans	
Lessons Learned Document	
NSD Deployment at NSD Location	
<i>System Installation and Implementation Execution Activities</i>	
<i>Insert as proposed</i>	
Total Implementation Deliverables and Activities	0
Security	
System Security Plan	
<i>Insert as proposed</i>	
Total System Security Deliverables and Activities	0
Quality Management	
Quality Management Plan	
<i>Quality Management Activities</i>	
<i>Insert as proposed</i>	
Total Quality Management Deliverables and Activities	0
Production Support and Transition	
Production Support and Transition Plan	
Maintenance Activity Report	
System Operation Manual	
System Documentation	
Disaster Recovery Plan	
System Administration Procedures	
Help Desk Plan (Business and technical)	
Help Desk Scripts and Decision Trees	
System Acceptance Document	
Maintenance and Operations (M&O) Plan	
<i>Production Support and Transition Activities</i>	
<i>Insert as proposed</i>	
Total Production Support and Transition Deliverables and Activities	0
Interfaces	
Interface Development Activities	
<i>Insert as proposed</i>	
Subtotal	0
Total System Implementation Costs	0

NSD Bidder Design, Development and Implementation Costs	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort (hours)

NOTES:

1. The Bidder shall identify all proposed deliverables being provided and any other one time costs not captured in the detailed hardware and software costs. Proposed deliverables must include each of the deliverables defined in the worksheet above plus additional deliverables that the Bidder recommends.
2. All tasks associated with the services proposed for NSD shall be included in the total cost for that service.
3. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.

NSD Bidder Support Costs

Maintenance and Operations (M&O)

Bidder M&O Support Costs	M&O Costs														
	Number of hours	Hourly Rate	YR 1 M&O	Number of hours	Hourly Rate	YR 2 M&O	Number of hours	Hourly Rate	YR 3 M&O	Number of hours	Hourly Rate	YR 4 M&O Estimate	Number of hours	Hourly Rate	YR 5 M&O (Estimate)
Staff Position															
Project Manager			\$0			\$0			\$0			\$0			\$0
Business Analyst			\$0			\$0			\$0			\$0			\$0
Data Base Administrator			\$0			\$0			\$0			\$0			\$0
Network Administrator			\$0			\$0			\$0			\$0			\$0
Trainer			\$0			\$0			\$0			\$0			\$0
Help Desk			\$0			\$0			\$0			\$0			\$0
Total			\$0			\$0			\$0			\$0			\$0

- NOTES:
- 1. The Bidder shall describe all proposed Bidder-provided support services items.
 - 2. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.
 - 3. M&O costs will be paid monthly in arrears.

NSD Cost Workbook
Labor Rates

0

Staff Position	Compo-site Weight %	Hourly Rate	Compo-site Rate	Senior/Junior	Bidder or Subcontractor Name
Project Manager			\$0		
Technical Lead			\$0		
Functional Lead			\$0		
Transition/Deployment Lead			\$0		
Training Lead			\$0		
Change Management Lead			\$0		
Trainers			\$0		
Help Desk			\$0		
Other			\$0		
			\$0		
Composite Rate	0%		\$0		

Notes:

1. Use the tables on this worksheet to provide Bidder/subcontractor hourly labor rates for the various classifications and grades of project personnel.
2. Bidder/subcontractor hourly labor rates must be inclusive of all travel, per diem, and any other related expenses.
3. The Bidder may include additional Staff Position titles to accurately represent the classifications it uses for describing the various classifications and grades of its Projects personnel, but it must include at a minimum all Key Positions listed in the tables above.
4. If the Bidder's existing titles differ from those listed for projects, it must map its titles to the listed categories to the extent possible and provide its mapping reference in Form A3-8, Pricing Assumptions Worksheet.
5. Bidders may insert additional rows as required for projects. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.
6. The Composite Rate Percentages for projects shall correspond to the associated Staff Position level of effort and the total must equal 100%.
7. Individual and composite hourly rates shall not increase greater than 5% per year.

NSD Bidder Payment Schedule					
Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start)	Deliverable Group Payment %	Maximum Deliverable Group Payment %	Deliverable Group Payment
Project Management	Project Management Plan, Communications Management Plan, Project Charter, Change Management Plan			5.00%	0.00%
	Weekly Written Progress Reports				
	Monthly Status Reports				
	Contract Close-out Action List and Deliverables				
Technical Environment Installation and Configuration	Specifications for all necessary hardware, software and tools, Technical Infrastructure Description (including hardware and system software and tools) for each of the five environments			5.00%	0.00%
	Environment Configuration Manual				
	Source code and object (executable) code				
Business Process Change Management	Business Process Management Plan, Business Process Management Activities and Outcomes			5.00%	0.00%
System Development - Design, Configuration Development and Customization	Systems Engineering Management Plan, Design and Development Plan (Software Development Plan)			10.00%	0.00%
	Business Continuity Plan				
	Test Plan				
	Testing Tools, Test Configurations, and Related Documentation, Test Scripts, Test Results and Quality Reports				
	Problem Resolution Management Plan, Problem Resolution Tracking System				
	System Security Plan				
	Quality Management Plan				
System Implementation and Testing	Implementation Plan, Performance and Capacity Plan, Operational Recovery Plan			15.00%	0.00%
	Interface Management Plan / Design Description, Interfaces Outcomes				
	Software Configuration Management Plan and System				
	Requirements Management Plan, Requirements Traceability Matrix				
	On-site Implementation Support Plan				
	Pre-Implementation Readiness Assessment, Production Release Plans				
	Pilot Plan, Lessons Learned Document (Pilot Complete)				
Interfaces				5.00%	0.00%
Knowledge Transfer and Training	Knowledge Transfer and Training Plan			10.00%	0.00%
	Training Documentation, Training Course Outline				
	Training Packages				

NSD Bidder Payment Schedule					
Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start)	Deliverable Group Payment %	Maximum Deliverable Group Payment %	Deliverable Group Payment
Deployment	Training Manuals				
	Updated Training Documentation, Knowledge Transfer and Training Activities				
	Lessons Learned Document (Pilot Complete)			40.00%	0.00%
	HCSS Deployment at NSD Site 1				
	HCSS Deployment at NSD Site 2				
	HCSS Deployment at NSD Site 3				
Production Support and Transition	Production Support and Transition Plan			5.00%	0.00%
	Maintenance Activity Report				
	System Operation Manual				
	System Documentation				
	Disaster Recovery Plan				
	System Administration Procedures				
	Help Desk Plan (Business and technical), Help Desk Scripts and Decision Trees				
	System Acceptance Document				
	Maintenance and Operations (M&O) Plan				
	Total		0.00%	100.00%	0.00%

NOTES:

1. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet links and calculations are correct.

NSD Cost Workbook
Pricing Assumptions
#REF!

Item #	REFERENCE (Section, Page, Paragraph)	Description	Rationale	Cost Impact if the Assumption Turns out Not to be Valid
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

Notes:

- Pricing shall be based on NSD provided Contract terms and conditions and Mandatory Requirements of the RFP (not the Bidder's exceptions to the Contract Terms and Conditions). The Bidder is required to state all Pricing Assumptions upon which its pricing is being determined. Insert as many lines as necessary. Assumptions shall not conflict with Contract terms and conditions or Mandatory Requirements of this RFP.
- The Bidder shall provide pricing consistent with the following:
 - Apply the pricing in accordance with the Contract Terms and Conditions and Mandatory Requirements of the RFP.
 - Clearly identify and explain all of the pricing assumptions made, upon which pricing is predicated including the cost/pricing impact if the assumption turns out not to be valid.
 - State if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.

Alternative Pricing
<Enter Service Provider Name>
Services Category

Alternative Services

Service Component	Unit	Cost	Comments	Period 1	Period 2	Period 3	Period 4
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
<enter Component>							
Totals							
Total Estimated Additional Costs				\$0	\$0	\$0	\$0

Please Complete this narrative Supplemental Cost Information Tab

1. Discuss software pricing methodology. Describe items such as license cost per seat, per named user, per module, per server, per site/organization. Provide your definition of how you determine a seat, named user,
2. Describe how you price software installed in various environments (e.g., development, testing, training, disaster recovery, operational).
3. Provide a description of your strategy for maintenance agreement pricing after the initial term of the maintenance agreement has ended or after additional software has been licensed.
4. Please describe your proposed framework for compensation addressing a risk/reward mechanism (i.e. indicate how you should be paid based on performance and completion of deliverables).
5. Describe your proposed approach and cost structure for change orders. Describe the cost structure for any ongoing service requests made by NSD.
6. Please describe your proposed expense structure and specific areas of expense other than those included in the cost workbook.
7. What additional early payment discounts are offered?
8. Please describe your proposed cost containment framework for expenses and how you have built efficiencies into your project plan.
9. Please describe any additional discounts/incentives available to NSD which will minimize the Total Cost of Ownership for the Student Information System Solution.
10. Please clearly identify and explain all the assumptions (Tab Pricing Assumptions) upon which your software license and maintenance fees, implementation costs and approach are predicated. Please also state if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.



Northshore
School District
3330 Monte Villa Pkwy
Bothell, WA 98021
425-408-7651

Purchasing Department

**NORTHSHORE SCHOOL DISTRICT #417
REQUEST FOR PROPOSAL**

Student Information System Solution and Implementation Services

Northshore School District is requesting proposals from qualified vendors for Student Information System (SIS) Solution and Implementation Services.

Interested vendors may request a proposal document by contacting Northshore School District, Purchasing Department, (425) 408-7651.

Proposals will be received by Northshore School District up to but not later than 2:00 PM, Friday, **DATE**. Sealed envelopes shall be marked "Request for Proposal – "Student Information System" and be addressed to the attention of Candace Manthey, Purchasing Manager, 3330 Monte Villa Parkway, Bothell, WA 98021.

A District technical evaluation team will review all proposals and vendors whose response best meets the critical requirements may be requested to demonstrate their application to the team. The selected vendor will be recommended for award to the Board of Directors.

Dated this **DATE**

Candace Manthey, Purchasing Manager
Northshore School District

Publication Dates: Seattle Daily Journal of Commerce
DATES

STUDENT INFORMATION SYSTEM SOLUTION AND IMPLEMENTATION SERVICES**TERMS AND CONDITIONS****PART 1 – INSTRUCTIONS TO BIDDERS****1.01 GENERAL INSTRUCTIONS TO BIDDERS**

- A. Northshore School District (“District”) is requesting proposals from vendors for a comprehensive Student Information System (SIS) including licensing of the system, design and site structure consultation, training, and on-going technical support and maintenance.

Northshore School District is the eleventh largest school district in Washington State. It has close to 20,000 students and approximately 2,300 full time employees. The District covers 60 square miles (two-thirds in King County, one-third in Snohomish County). The Northshore District population is approximately 112,000 people.

- B. The Northshore School District (NSD) is seeking a qualified Student Information System (SIS) Solution Provider that can successfully provide the products and services described in this RFP in preparation for its planned District-wide replacement of its existing SIS. The system must support the District’s goals in the following areas
1. Provide end-users, decision makers and stakeholders at all levels with easy, flexible, dynamic and user-friendly access to student data.
 2. Improve the efficiency of business process and operations by reducing or eliminating paperwork, current manual processes, duplicate data entry and inefficient/unintuitive system interactions.
 3. Improve service delivery to NSD’s customers – students and parents through transparent access to student data and facilitation of easy interactions with NSD teachers and staff.
 4. Facilitate rapid growth, adaptability and innovation through the better use of student data, efficient transaction processing, and support of dynamic planning processes.
 5. Further the goal of integrated access to NSD’s information resources through better system interoperability and the reduction/elimination of parallel and shadow information systems.

- C. Bidders will submit one (1) clearly marked original, and two (2) copies of their proposal. Proposals are to be submitted in a sealed envelope, addressed to Candace Manthey, Purchasing Manager, Northshore School District, 3330 Monte Villa Parkway, Bothell, WA 98021. The envelopes shall also bear on the outside, the name of the Bidder, address, the date of the proposal opening and plainly marked "STUDENT INFORMATION SYSTEMS RFP". It is the sole responsibility of the Bidder to see that its proposal is received at the designed location by the designated time. Electronically transmitted proposals will not be accepted. Any bid received after the time set for the opening of bids will be returned unopened.
- D. The contract for the SIS will be awarded to one (1) Bidder.
- E. The award of the contract is anticipated to occur on or near DATE and the contract will run through DATE, with the option, at the discretion of the District, to renew licensing and technological support on an annual basis from September to August for each successive year after the initial period.
- F. The District will evaluate all Bidders' proposals and the District will award the contract to the most responsive Bidder. Distribution of this RFP or receipt of any proposal shall not constitute a commitment by the District to any of the bid participants. If it is determined that the submitted proposals are not economically beneficial to the District or for other business reasons, the District may, at its sole discretion, reject all proposals, waive informalities in the proposal process, or do nothing at all.

1.02 PREPARATION OF PROPOSAL FORM

- A. Bidder must respond to every functional, technical, and general question contained in the response documents. Any exception taken to any specification must be stated immediately following the specification in question. The District reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.
- B. Bidder must fill in spaces provided on the proposal forms in ink or respond with a printed version of the proposal form to include the responses, provided the proposal form is in the same format as the one provided by the District. All costs in submitting a proposal, responding to inquiries, and if requested, demonstration of product and services, shall be borne in full by the interested Bidder.
- C. Bidder-initiated changes in or additions to the bid invitation, recapitulations of the work bid upon, or alternate proposals or any other modifications of the invitation, which are not specifically allowed in the contract documents, may result in the District's rejection of the bid as being non-responsive to the invitation. The Bid

Document shall not be altered. A Bidder submitting a deviation shall do so by way of an addendum.

D. No oral telephone modifications of any bid submitted will be considered.

1.03 IMPLIED WARRANTIES PRESERVED

A. The District will not accept any exclusion or modification of the implied warranties of merchantability or fitness for particular purpose by the seller.

1.04 ADVERTISING

A. Award of this contract does not grant the right to the contractor to utilize the award in any advertising media without the District's direct permission nor may any District employee endorse a product or service covered by this contract.

1.05 CONFLICTS OF INTEREST

A. No director, employee or agent of the Bidder shall give or receive any commission, fee, rebate, gift or entertainment in connection with the work, or enter into any non-consumer business arrangement with any director, employee or representative of Northshore School District other than as a representative of the District.

1.06 LIENS, CLAIMS, AND ENCUMBRANCES

A. Bidder warrants and represents that all the goods and materials delivered herein are free and clear of all liens, claims, or encumbrances of any kind.

1.07 SIGNATURES

A. The proposal must be signed in the name of the Bidder and must bear the title and signature of the person duly authorized to sign the proposal.

1.08 WITHDRAWAL OF PROPOSAL

A. Any Bidder may withdraw his proposal, either personally or by written request, at any time prior to the scheduled closing time for receipt of proposals.

1.09 EXAMINATION OF INSTRUCTIONS, CONDITIONS, AND/OR SPECIFICATIONS

A. Bidders shall thoroughly examine and be familiar with all instructions, conditions, and/or specifications. The failure of a Bidder to receive or examine any form, attachments, addendum or other document, or visit to the site when required in order

to acquaint the Bidder with existing conditions, shall in no way relieve the Bidder from obligations concerning the bid or the contract. The submission of a proposal shall be taken as prima facie evidence of compliance with this section.

- B. If any person contemplating submitting a proposal for the proposed contract is in doubt as to the true meaning of any part of the proposal request, or finds discrepancies in, or omissions from the specification, they may submit a written request for an interpretation or correction thereof to the District. The Bidder submitting the request will be responsible for its prompt delivery and it must be received by Candace Manthey, District Purchasing Manager, **no later than 4:00 pm, DATE**. Request for interpretation of specifications must be hand delivered, emailed, or faxed to the Purchasing Department, Northshore School District, attention Candace Manthey, Purchasing Manager, at 425-408-7655 or emailed to cmanthey@nsd.org. Any interpretation or correction of the proposal documents will be made only by addendum duly issued and a copy of such addendum will be mailed, faxed, or delivered to each person receiving a set of such proposal documents. All such addenda shall become part of the proposal documents. No oral interpretation of any provision in the proposal documents will be made to any Bidder.

1.10 ALL CHARGES INCLUDED IN PRICE

- A. Unless the District specifies otherwise, the bid price shall include the Bidder's total charges for supplying all products and/or services, including shipping/handling costs, processing fees, and transportation charges at any location within District boundaries. The District will specify exact locations when the bid is awarded and products and/or services are ordered.

1.11 ASSIGNMENT OF CONTRACT

- A. The Bidder shall not assign this contract nor any part thereof, nor any moneys due or to become due thereunder, without the prior written approval of the District.

1.12 TIME FOR CONTRACTING

- A. It is understood and agreed that this bid may not be withdrawn after the date set for the opening of bids, nor may the Bidder refuse to accept any contract proffered based on the bid for the period of ninety (90) days from date of bid opening.

1.13 DELIVERY

- A. Delivery of services must occur during District-agreed upon hours.

1.14 TERMINATION

- A. In the event that any provisions of this contract are violated by the Bidder, the District may serve written notice upon the Bidder of its intention to terminate such contract, such notice to contain the reason for such intention to terminate the contract, and unless within ten (10) days after the serving of such notice upon the Bidder such violation shall cease and satisfactory arrangement for correction be made, the contract shall upon expiration of said ten (10) days, cease and terminate. In the event of any such termination, the District shall immediately serve the notice thereof upon the Bidder in default, and procure all materials or services involved in the contract from other sources, and the Bidder shall be liable to the District for any excess cost occasioned by the District thereby.
- B. The District reserves the right to immediately terminate Bidder's employees or subcontractors for unsafe care or failure to adhere to the scope of work and/or District Policies and Procedures.
- C. The District reserves the right to terminate services under this contract at the convenience of the District. Vendor shall be paid for any work completed up to the written cancellation of the District.

1.15 LAW

- A. This Agreement and the legal relations between the parties shall be governed by and construed in accordance with the laws of the State of Washington without regard to any choice of law rules that would require the application of the laws of any other jurisdiction. In the event that suit is brought by a party, the parties agree that trial of such action shall be vested exclusively in the state courts of the State of Washington located in King County, State of Washington.

1.16 TAXES

- A. State and local sales taxes shall not be included in any item of this bid. However, sales tax shall be paid to the supplier by the District, and the supplier shall make sales tax payments as provided by statute.

1.17 EMPLOYEES WHO HAVE BEEN CONVICTED OF CRIMES INVOLVING CHILDREN

- A. The Bidder, or any of its subcontractors, shall not utilize any employee at the District site or allow any contact between school children and any employee when an employee has plead guilty to or have been convicted of any felony crime involving the physical neglect of a child under Chapter 9A.42 RCW, the physical injury or death of a child under Chapter 9A.32 or 9A.36 RCW (except motor vehicle violations under Chapter 46.61 RCW), sexual exploitation of a child under Chapter 9A.44 RCW where a minor is the victim, promoting prostitution of a minor under Chapter 9A.88 RCW,

the sale or purchase of a minor child under 9A.64.030 RCW, or violation of similar laws of another jurisdiction.

- B. Bidders who have regularly scheduled unsupervised access to children, and/or who hire employees who have regularly scheduled unsupervised access to children, shall perform a record check through the Washington State Patrol criminal identification system under RCW 43.43.830-43.43.834, 10.97.0303 and 10.97050, and through the Federal Bureau of Investigation before hiring the employee. The record check shall include a fingerprint check using a complete Washington State criminal identification fingerprinting card. If the Bidder or employee has had a record check within the previous two (2) years, the Bidder may waive the requirement. Bidder will be responsible for all costs associated with testing and providing certificates and records.

1.18 TOBACCO ON SCHOOL PREMISES

- A. RCW 28A.210.310 prohibits the use of tobacco in any form on school district property. Smoking or other use of tobacco products will not be permitted on District property.

1.19 AFFIRMATIVE ACTION CONTRACT COMPLIANCE STATEMENT

- A. In the event of noncompliance by the Bidder with any of the nondiscrimination provisions of the contract, the District shall have the right, at its option, to cancel the contract in whole or in part. If the contract is canceled after part performance, the District shall be obligated to pay the fair market value or the contract price, whichever is lower, for goods or services which have been received and accepted.
- B. The Bidder assures the District that its agency/labor union will comply with all state and federal guidelines and/or regulations. Therefore, all applicants seeking employment opportunities and all contracts for goods and services will be considered and will not be discriminated against on the basis of race, color, national origin, gender, or disability. This is in accordance with Title VI of the 1964 Civil Rights Act; Section 504 of the Rehabilitation Act, 1973 as amended; Americans with Disabilities Act, July 26, 1990, P.L. 101-336; and Title IX/Chapter 28A.640 RCW of the Education Amendments of 1972, as amended.

1.20 INDEMNIFICATION

- A. The District and the Bidder shall each be responsible for the consequences of any act or failure to act on the part of itself, its officers, agents, employees, and volunteers.

Each party shall be responsible for its own negligence and shall indemnify and hold the other party harmless for such acts of negligence.

1.21 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS

- A. Contractor certifies that, to the best of their knowledge/belief that neither the Contractor nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded for the award of contracts by any Federal governmental agency or department.

“Principals”, for the purpose of this certification, means officers; directors; owners; partners; and persons having primary management or supervisory responsibilities within a business entity (e.g. general manager, plant manager, head of subsidiary, division, or business segment, and similar positions).

Contractor shall provide immediate written notice to the District if at any time during the term of this Agreement, including any renewals hereof, such certification was erroneous when made or has become erroneous by reason of changed circumstances.

Should the prospective lower tier participant enter into a covered transaction with another person at the next lower tier, the prospective lower tier participant agrees by signing this agreement that it will verify that the person with whom it intends to do business is not excluded or disqualified. The prospective lower tier participant will do this by:

1. Checking the Federal Excluded Parties List System (EPLS); or
2. Collecting a certification from that person if allowed by this rule; or
3. Adding a clause or condition to the covered transaction with that person.

Based on such notification, or if the District should determine at any time that this certification is false, the District reserves the right to review the status of the organization and if necessary, terminate this Agreement.

1.22 PROTEST PROCEDURE

- A. Any actual or prospective Bidder who is aggrieved in connection with the solicitation or award of this contract may protest to the Northshore School District in accordance with the procedures set forth herein. Protests based on the specifications or other terms in this solicitation document, which are apparent prior to the date established for submittal of proposals, shall be submitted in accordance

with section 1.05 of these terms and conditions. Protests based on other circumstances shall be submitted within five (5) days after the aggrieved person knows or should have known of the facts and circumstances upon which the protest is based; provided, however, that in no event shall a protest be considered if all proposals are rejected or if received more than five (5) days after the award of this contract.

- B. In order to be considered, a protest shall be in writing and shall include: (1) the name and address of the aggrieved person; (2) the contract under which the protest is submitted; (3) a detailed description of the specific grounds for protest and any supporting documentation; and (4) the specific ruling or relief requested. The written protest shall be addressed and delivered to: Candace Manthey, Purchasing Manager, Northshore School District, 3330 Monte Villa Parkway, Bothell, Washington 98021 and shall be clearly labeled "Bid Protest".
- C. Upon receipt of a written protest, the District shall promptly consider the protest. The District may give notice of the protest and its basis to other persons, including other Bidders involved in or affected by the protest. Such other persons may be given an opportunity to submit their views and relevant information. If the protest is not resolved by mutual agreement of the aggrieved person and the District, the District will promptly issue a decision in writing stating the reasons for the action taken. A copy of the decision will be mailed by certified mail, return receipt requested, or otherwise promptly furnished to the aggrieved person and any other interested parties. The District's decision shall be final and conclusive. If no decision is received within ten (10) days of the District's receipt of the protest, it will be deemed rejected.
- D. Failure to comply with these protest procedures will render a protest untimely or inadequate and may result in rejection thereof by the District.

1.23 PUBLIC INFORMATION/CONFIDENTIALITY

- A. The District understands that Bidders may include within their proposal information that which is deemed confidential in the opinion of the Bidder. The Bidder must understand that the District is subject to clear legislation governing open records and public information requests within the State of Washington. Bidders must clearly mark portions of their proposal that they feel are exempt from disclosure pursuant to RCW 42.17.210 and include an explanation as to why they believe the indicated documents are exempt. The District will not be bound by any blanket confidentiality agreements, and the District makes no assurances that confidential materials will be held in confidence if they are not deemed qualified for exemption under the laws of the State of Washington.

- B. Bidder acknowledges the obligations for maintaining the confidentiality of student records and access to the parents and students of such records in accordance with the Family Education Rights and Privacy Act (FERPA).

1.24 INDEPENDENT CONTRACTOR

- A. This Agreement does not create any relationship with the District of employer and employee, master and servant, principal and agent, or landlord and tenant. Contractor has no power or authority to make any statement or representation or to incur any debt, litigation or liability of any kind in the name of the District, for it, or on its account. Contractor and persons engaged by the Contractor agree that they are not volunteers or employees of the District in any capacity. Contractor is responsible for all applicable taxes including, but not limited to, Social Security and Federal Withholding.

1.25 STANDARD OF CARE

- A. Contractor is an independent contractor and the Work performed, findings obtained, and recommendations prepared by Contractor shall be in accordance with generally and currently accepted professional practices and standards governing recognized firms in the area engaged in similar Work, who are familiar with the Work and exercising the skill, diligence, and care required of Contractor by this Agreement.

PART 2 – GENERAL INFORMATION

2.01 PROGRAM REQUIREMENTS

Bidder must quote and be able to provide all of the following products and services to the full extent required for a successful system implementation and operation:

1. Application software/service licensing, hosting fees and annual maintenance for 2, 3, 4, and 5 years.
2. Design consultation and services related to the initial setup and navigation structure for site(s).
3. Connections to LDAP/ActiveDirectory services for account maintenance.
4. Implementation services to support district staff.
5. Staff functional and technical training.

6. Options in the product for migrating data from the current student information system (eSIS) and any additional costs for that data migration.
7. Documentation/Online Help.
8. Technical support – online, phone, live chat.
9. Able to run on VMware ESX 5 or later.
10. Able to run on a 64-bit version of Debian Server 6 or newer; Ubuntu Server 12.0.4 LTS or newer; CentOS 6.4 or newer; Windows Server 2008 R2 or newer.
11. Will interact with the District's directory services (LDAP, ActiveDirectory).

2.02 BIDDER QUALIFICATIONS

- A. In order to be considered as a qualified applicant, each Bidder must submit evidence regarding experience and capability in providing a successful content management system. The experience, responsibility, and work of the Bidder will be considered in the evaluation of proposals.
- B. Bidder must include with the proposal three (3) references, preferably from public agencies, with addresses, year of product and/or service installation, officer's name and phone number. The District reserves the right to obtain references via the Bidder's submitted list, its own contacts, or in any other way available to the District.
- C. Bidder certifies that all state and federal endorsement and certification requirements are met and maintained by Bidder's employees and the Bidder will provide said endorsements and certifications upon request.
- D. Bidder agrees to purchase and maintain at its sole expense insurance policies, issued by insurance companies acceptable to the District, providing the types of coverage and limits of liability set forth below. These policies shall include "Northshore School District and its officials, agents, employees, and volunteers as additional insured" and shall be primary to any insurance which may be carried by Northshore School District. Bidder shall provide the District with a certificate of insurance evidencing such coverage prior to commencement of operations under the contract.

Commercial Liability -

\$1,000,000 bodily injury, personal injury, and property damage combined per occurrence with an aggregate not less than \$2,000,000 including

- Premises and operations liability
- Contractual liability
- Personal injury liability
- Products and completed operations liability
- Broad form property damage liability
- Adding Northshore School District, its officials, agents, and employees as additional insured, and a copy of the endorsement naming the District as a Certificate Holder and Primary, noncontributing Additional Insured
- Waiving subrogation against the above

Automobile Liability –

- \$1,000,000 per person, \$1,000,000 per occurrence bodily injury, and \$1,000,000 per occurrence property damage, \$1,000,000 combined single limit.

Worker's Compensation –

- Compliance with the state's requirements with minimum of \$1,000,000 employer's liability.

Property Insurance –

- Covering all property used in connection with the contract for full replacement and covering "all risks" of physical loss.
- Waiving subrogation against the above.

- E. Bidder will follow its standard employment policies and procedures to verify that all personnel meet applicable licensing requirements. Bidder or its subcontractor, if applicable, will maintain direct responsibility as employer for payment of wages and other compensation, and for any applicable mandatory withholdings and contributions such as federal, state, and local income taxes, social security taxes, workers compensation, and unemployment insurance.
- F. If the District determines that an employee provided by the Bidder is incompetent, has engaged in misconduct, or has been negligent, the District may require the individual to leave the premises and will notify the Bidder immediately. The District's obligation to compensate for such individual's services will be limited to the number of hours actually worked. The Bidder will not reassign the individual to the District without prior approval from the District.

2.03 DISQUALIFICATIONS OF BIDDERS

- A. The District in its discretion, may determine that a Bidder is not responsible and reject its proposal for any of the following reasons:

1. More than one proposal on the same project from a Bidder under the same or different names.
2. Evidence of collusion with any other Bidder or Bidders. Participants in such collusion shall be disqualified from submitting any further bids.
3. If a Bidder is not qualified to perform the contract.
4. Unsatisfactory performance record, judged from the standpoint of conduct of service, or progress, as shown by past or current service for the District.
5. Failure to pay or settle bills on any former or current contracts.
6. If the Bidder has previously defaulted in the performance of a written public contract, or has been convicted of a crime arising from a previous public contract.
7. Any other inability, financial or otherwise, to perform the contract.
8. For any other reasons deemed proper as determined from a pre-award survey of Bidder's capability to perform.
9. Any bid submitted by a Bidder who is not registered or licensed as may be required by the laws of the State of Washington.

PART 3 – CONTENT, FORM, AND EVALUATION OF PROPOSALS

3.01 CONTENT

- A. Interested Bidders are cautioned to provide in their proposals as much detail as possible pertaining to their capabilities and experience to the services outlined in this proposal. However, please do not include extraneous marketing materials.
- B. At a minimum, each proposal must include the following items:
 - Cover Letter
 - Statement of Work (A1_NSD_SOW.docx)
 - Certifications (A2_NSD_Certification.pdf)
 - Vendor Profile References and Subcontractors (A3_NSD_Vendor_Profile_References.xlsx)
 - Cooperative Purchasing (A4_NSD_Cooperative_Purchasing.pdf)
 - Proposed Solution and Staffing Plan (A5_NSD_Proposed_Solution_and_Staffing.xlsx)
 - Functional Requirements (A6_NSD_Functional_Requirements.xlsx)

- Technical and Other Requirements (A7_NSD_Technical and Other Requirements.xlsx)
- Completed Quotation Price Form (A8_NSD_Cost_Proposal.xlsx)

Additionally, the vendor should include the following items:

- Vendor's Sample Contract with Terms and Conditions
- Insurance Documentation: Certificate of insurance, Comprehensive or Commercial General Liability Insurance, Professional Liability Insurance

3.02 FORM

- A. Each Bidder shall submit one (1) clearly marked original and two (2) copies of their proposal to Candace Manthey, Purchasing Manager, Northshore School District, 3330 Monte Villa Parkway, Bothell, WA 98021 in a sealed envelope. The envelope shall be clearly labeled "NORTHSHORE SCHOOL DISTRICT, REQUEST FOR PROPOSAL, STUDENT INFORMATION SYSTEM".

3.03 BID EXCEPTIONS

- A. Include any items of the proposal which cannot be met. Please clearly identify and detail.

3.04 EVALUATION OF PROPOSALS

- A. Evaluations will be based on the criteria listed below. The District will be the sole judge as to the allocation of points and acceptability of proposals. To be considered, all proposals must be complete.

<u>CRITERIA</u>	<u>MAX POINTS</u>
Vendor Strength & Experience	10 points
References	10 points
Proposed Solution & Staffing Plan	20 points
System Functional Solution	40 points
Technical Architecture	10 points
Cost Proposal	10 points

3.05 BIDDER DEMONSTRATIONS

- A. The District, at its discretion, may ask Bidders with the highest point totals to provide a product and service demonstration to District staff at a District facility. Bidders chosen for the demonstration should be prepared to address the specific

components of the software as addressed in the Bidder's response as well as the overall function of the system. Each chosen Bidder will provide a computer for the demonstration and the District will provide the projector.

Northshore School District

Attachment A1 – Statement of Work (SOW)

Important Instruction: Vendors are required to indicate any proposed changes to this SOW directly into this document. The document's "track changes" feature is currently activated in order for these changes to be reflected and which would facilitate discussions with NSD during contract negotiation process with the selected vendor. Please save the document with the "tracked changes" activated and attach to your proposal.

November 1, 2013

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1.0 Statement of Work

This Statement of Work ("SOW") describes the services ("Services") to be provided by the Vendor in assisting NSD with the implementation of the Student Information System ("SIS") solution and is entered into as of the Statement of Work Effective Date set forth below.

2.0 Term of the SOW

Duration: This SOW will terminate when the implementation has stabilized. Stabilization metrics (which will be utilized to determine that Stabilization has been achieved) will be developed and mutually agreed to prior to system Go-Live.

3.0 Project Directors

NSD		Vendor	
Name:	Allen Miedema	Name:	
Title:	Technology Director	Title:	
Contact Info:	(425) 408-7752	Contact Info:	
Email:	amiedema@nsd.org	Email:	

4.0 Scope

NSD desires to achieve its strategic goals through the replacement of its current SIS and improvement of related business processes. NSD desires to deploy new technology and adopt "leading practice" business processes that are supported by modern SIS solutions.

Vendor will perform the Services described in this SOW and will collaborate with NSD in the implementation and execution of the Project as further described in this SOW.

The parties intend that the Vendor will manage the Project at all times during its engagement under this SOW and shall lead, coordinate, oversee and manage all activities associated with the various phases comprising the Project, subject to the terms and conditions of the Contract between NSD and the Vendor and this SOW. The Parties acknowledge that and nothing in this section is intended to alter the parties' respective responsibilities under this SOW, including their responsibilities for Project subcontractors. During the term of this SOW, Vendor (with support from NSD specified in this SOW and Contract) will facilitate and provide Services for the planning, management and creation of selected Project Deliverables, as further described below.

An overview of each segment of the Project and the Services to be performed for each are set forth below:

1. **Project Management & Preparation:** Involves establishing the necessary tools, resources and baselines to create, implement and maintain a sustaining environment for the Project Management Organization (PMO). This also involves reviewing documentation, and working with

key Project team members to assess and understand Project goals, scope, planning, constraints, success factors, Project organization, requirements, and analysis.

Vendor will provide project management services that utilize leading-practice methodologies, tools and processes to manage the Project, including plan management, issue resolution, change control, knowledge management, quality management and status reporting, and Project-specific coordination in support of developing the proposed phased Deliverables, including Steering Committee meeting presentations, team-level communications, and messages to be distributed throughout the organization. Deliverables for Project Management & Preparation are listed in Section 6.

2. **Business Process Review and Analysis:** The vendor will support NSD in reviewing current business processes and how they will be impacted by the selected system. The vendor will provide best practices and knowledge from previous implementations and work with NSD to ensure business processes work efficiently with the support of the new system.
3. **Organizational Change Management (OCM) and Training Support:** A critical component of the project will be effective organizational change management which includes thorough technical and end-user training, effective communication and successful stakeholder participation. The Vendor will work with NSD to develop an OCM plan and a comprehensive Training Program. This includes the development and execution of a communication plan, involvement in presentations, stakeholder forums, etc., and the development of a Training Plan, training curriculum and other training documentation, materials and media.
4. **SIS Requirements Validation & System Design:** This will involve the Vendor validating the requirements of the SIS with NSD and developing a system design to configure, customize or modify the system as required to meet these requirements. This stage will include the identification and design of Reports, Interfaces, Conversions, Enhancements and Forms (RICEF) objects required for deployment. It is NSD's intention to minimize any system modifications (software code changes). Customizations (additions to current code for report writing, new form fields, etc.) will be required to meet requirements.
5. **Solution Implementation:** Involves configuring, developing and installing the software, conversion tools, application interfaces, forms, required enhancements, system management, reports, workflows, system tests, quality assurance process and the like. Legacy data will be converted and migrated and the production system installed.

Test plans, test data, and cases will be developed and used throughout the testing process, including extensive integration testing to determine that in scope processes and systems are tested thoroughly in preparation for the Go-Live portion of the implementation phase.

This portion of the implementation phase also involves finalized end user training plans and materials. The Organizational Change Management and risk management plan is executed with extensive communications throughout NSD.

Vendor will lead configuration and implementation of business process requirements, conversion tools, interfaces with agreed upon systems and complementary products, and NSD external applications, forms, workflows, system management, reports, enhancements, system tests, and quality assurance process as specified in the Deliverables for Implementation listed in Section 6.

Key Solution Implementation Deliverables are:

- Provision of Baseline SIS Software and Licenses
 - Deployment of a fully configured, customized and modified SIS
 - Deployment of a SIS that supports fully certified and operational Washington State Reports
 - Functioning in-bound and out-bound interfaces to the District's other systems
 - Completed and migrated data from legacy systems (eSIS)
 - Integrated third-party software if proposed
6. **Testing & Preparation for System Go-Live:** Involves planning and implementing final tests, end user training, cut-over activities, and readiness plans for go-live steps. Within this phase, the system integration testing is completed and in scope systems function correctly. Detailed transition and cutover plans are created and the production system is installed and configured with transports and data developed.

Vendor will lead planning and implementing the final tests, end user training, cut-over activities, and readiness plans for go-live steps as specified in the Deliverables for Preparation for System Go-live listed in Section 6.

Key Deployment Deliverables are:

- Conduct Unit and System Testing
 - Conduct Integration Testing
 - Conduct Volume/Stress Testing
 - Support User Acceptance Testing
 - Conduct Production Tests
 - Complete Cutover to new software
 - Conduct Training
 - Conduct Project Close-out
7. **Go-Live and Deployment:** Involves moving the stage or "wave" of users for the initial Go-Live and functions from the pre-production environment to the live production environment. Vendor will move the stage or "wave" of users and functions for the initial Go-Live from the pre-production environment to the live production environment as specified in the Deliverables for Go-Live and Deployment listed in Section 6.
8. **Pre-Stabilization and Post Go-Live Assistance:** Involves support through completion of Stabilization, system monitoring, and optimizations as needed. Within this phase, the Project closes and support responsibility is passed to NSD's Support Organization. Vendor will provide support through completion of stabilization, system monitoring, and optimizations as required by NSD's Service Level Requirements (SLR). Refer to Section 4.9 — Service Level Requirements for detail.

4.1 High-level Implementation Timeline

The overall estimated high-level timeline for this implementation is as follows. The Vendor's work plan should take this overall timeframe into consideration only as guidance in the development of the proposed detailed work plan. Insert new dates below

Task (For planning purposes only)	Start	Finish
SIS Implementation High-Level Estimated Timeline		
SIS Vendor Selection and Contract Negotiations		
Project Planning and System Design		
Organization & Business Process Review		
System Configuration & Installation		
System Testing		
Stakeholder Training		
Parallel Production - For Enrollment & Registration		
Cut-over to Final Production System		

4.2 Organizational Scope

Organizational scope establishes the project's boundaries and identifies the departments and business units that will be impacted by the project. Approximately 5,000 total users will eventually become SIS end users.

For this Project, the following table lists current user counts and projected end users by building/program:

Table 1. Organizational Scope — In-Scope For this Project

School District Schools and Programs		Student Count	Approx. Current End Users
1.	Arrowhead Elementary	410	100
2.	Bear Creek Elementary	462	100
3.	Bothell High School	1573	250
4.	Canyon Creek Elementary	732	150
5.	Canyon Park Junior High	795	200
6.	Cottage Lake Elementary	341	100
7.	Crystal Springs Elementary	628	100
8.	East Ridge Elementary	338	100
9.	Fernwood Elementary	702	150
10.	Frank Love Elementary	628	150
11.	Hollywood Hill Elementary	370	100
12.	Inglemoor High School	1601	300
13.	Kenmore Elementary	503	150
14.	Kenmore Junior High	682	150
15.	Kokanee Elementary	663	150
16.	Leota Junior High	702	200
17.	Lockwood Elementary	532	100
18.	Maywood Hills Elementary	578	150
19.	Moorlands Elementary	619	150
20.	Northshore Junior High	674	150
21.	Northshore Networks	130	150
22.	Northshore Online School (TAA)	33	100
23.	Secondary Academy For Success	125	150

School District Schools and Programs		Student Count	Approx. Current End Users
24.	Shelton View Elementary	493	100
25.	Skyview Junior High School	946	200
26.	Sorenson Early Childhood Cntr	118	100
27.	Special Services	152	100
28.	Sunrise Elementary	298	100
29.	Timbercrest Junior High	834	200
30.	Wellington Elementary	550	150
31.	Westhill Elementary	478	150
32.	Woodin Elementary	571	150
33.	Woodinville Community Center	5	100
34.	Woodinville High School	1386	250
35.	Woodmoor Elementary	849	200
	Administrative	0	100
	Totals	20501	5300

4.3 Preliminary Business Process Scope

The scope of the project reflects NSD's functional requirement categories that were used as the baseline for determining the project's business process scope.

- Mandatory Requirements
- General Functional Requirements
- Registrations
- Attendance
- Scheduling
- Grading
- Transcripts
- Graduation Requirements
- Special Programs
- Special Education
- Student Behavior
- Student Health
- Fines and Fees
- Assessments
- Administrator Portal
- Teacher Portal
- Parent - Student Portal
- State Reporting

The final business process scope of the Project will consist of the processes defined within the Deliverables for the completion of the design milestone of the Project. Changes to the business process scope during the Implementation segment will be addressed in accordance with the change control procedures.

4.4 Technical Infrastructure

The Vendor will be required to oversee and support the configuration and tuning of the technical infrastructure components in support of the project. Examples of technical infrastructure topics include, but are not limited to the following:

Table 2. Current NSD Technical Infrastructure Components

Components	Description
Operating systems	The system software application and database servers run on industry standard 64-bit Operating systems running in Vmware vSphere 5 or later. Preferred: Debian Linux, Ubuntu Linux, Redhat Linux, Windows Server 2012 or later releases
Database products and tools	The system utilizes industry standard RDBMS platform which supports ANSI-SQL and ODBC connectivity Preferred (in order of preference): MySQL 5.6, PostgreSQL 9, MariaDB 10, SQL Server 2008 R2, Oracle 11g, or later versions of any
Web servers	Apache, Tomcat, IIS

It is NSD's expectation that the proposed solution will be fully redundant in terms of hardware and software. Implementation design will take advantage of NSD's multiple internal data centers, application and database server clustering, session fail over, and hardware redundancy (i.e. multiple power supplies, RAID, multi-path SAN cards). At a minimum, there will be one database server and two application servers at each of two NSD data centers with additional hardware as deemed necessary by the vendor to meet SLA performance requirements.

4.5 Related Applications and Systems Planned for Decommissioning or Interfacing with the Student Information System Solution

Based on the preliminary application assessment conducted by NSD, the following are the current applications/systems that will be impacted by the new system. The Vendor is expected to provide recommendations for which of the following existing applications/software will best be interfaced or decommissioned/replaced by the SIS Solution.

Table 3. Systems For Replacement or Decommissioning

System/Application	Function
Administrative Assistants Ltd. eSIS	Current SIS

Table 4. Potential Systems For Interfacing twith SIS

System/Application	Function
EasyGradePro	Provide for the ability to export out class rosters for EasyGradePro, an electronic teachers gradebook, and the ability to import grade marks into the solution.
Destiny	Provide the ability to integrate Destiny, our Library system.
FitnessGram	Provide the ability to integrate with FitnessGram, for tracking student fitness.
InTouch	Provide the ability to integrate InTouch, for student photographs.
Active Directory	Active directory (Windows Server 2008 functional level) with LDAPS support
SchoolMessenger	The ability to integrate with School Messenger our call tracking system.
IEP Online	The ability to interface with IEPOne, or special education Individualized Education Plan system.
Hapara Teacher Dashboard	Provide the ability to integrate with Hapara, a teacher dashboard system.
Pearson SuccessNet	Provide the ability to integrate with Pearson's SuccessNet.
VersaTrans	Provide the ability to integrate with VersaTrans, our transportation system.

4.6 Development Services

The Vendor may be asked to provide the following development services. These include, but are not limited to:

- **Data Conversions**

Assumptions: NSD expects to convert data from the current system “eSIS” into the Solution. There may also be district-specific data sources, such as spreadsheets and PC databases that will need to be converted or pre-populated into the Solution. The Vendor and NSD will further define the conversion criteria during project planning.

- **Interfaces**

Assumptions: The number of temporary interfaces will be dependent on NSD's accepted roll-out strategy. The permanent interfaces will be related to our internal systems. As listed above.

- **Reports and Forms**

Assumptions: To the extent possible, NSD will use the out of the box reports for all functional areas. If delivered available reports do not meet the required business processes as determined by the project team, the Vendor may be asked to develop the reports and/or forms needed.

4.7 Process Workflows

The Vendor will be required to validate requirements and current manually-oriented process flows. In the new system, functions and workflows will be common, standardized and consistently used across all buildings and programs. The Vendor will be required to validate, refine, and take accountability for requirements and workflow development for the new system. It is anticipated that the quantity, quality, and specifications for functions and workflow will be further defined during the Requirements Analysis and Design phase.

4.8 Reporting & Regulatory Requirements

The Vendor will be required to consider a number of mandated and regulatory-related business requirements. Refer to Attachment A6 - Functional Requirements (MS-Excel).

4.9 Service Level Requirements

The Student Information System, once deployed and functioning in a production environment, must meet the following performance and availability requirements:

- SIS remains accessible to all end users 24x7
- SIS remains available to all end users in the event of failure of any one hardware component (server, network link, storage, processor, etc.).
- SIS must be made available to all end users within one hour or less of any event that takes one of NSD's datacenters offline.
- SIS performance requirements at the screen level (for users) will be defined in the contract between the selected vendor and NSD and will be based upon industry-standards and benchmarked performance standards for that product as claimed in the company's sales literature.
- System down time (for maintenance, upgrades or problem resolution) should be limited to non-working hours. The system must be easy to maintain and upgrade.
- Effective tutorials (training) and overall ease of use are required in order that users can logically resolve most problems (that are not system or hardware related) with relative ease without the need for external help.

- SIS should be able to completely function through both routine and extraordinary operational scenarios with only one (less than 1 FTE) System Administrator who can manage all anticipated functions. There will need to be redundancy in the position (i.e., at least one backup System Administrator who can assume the role in the absence of the designated SA) but the entire SIS System should only need one System Administrator available during normal working situations and conditions. If the system is hosted, this SA must be named.
- The SIS should be able to completely function through both routine and extraordinary operational scenarios with less than 1 FTE dedicated Data Base Administrator who can manage all anticipated functions. If the system is hosted the DBA must be named.
- The vendor will have available technical resources for District staff to contact regarding troubleshooting activities.
- The SIS should be user friendly to administer and must not require technical staff assigned in each building or program.
- The SIS must be capable of smoothly facilitating a rapid scale up in users both from a performance and maintainability perspective.

5.0 Roles & Responsibilities

The following Responsibility Assignment Matrix outlines the scope of work and high-level roles and responsibilities of both Vendor and NSD for the project.

NSD maintains full ownership of this project. However, the Vendor is the key player in this implementation and when Vendor is in the lead role for a particular task, the Vendor will provide leadership, direction and full accountability for the task and deliverables stated.

Activity Role Key:

- **R — Responsible:** Those who do the work to achieve the task. There is typically one role with a participation type of Responsible, although others can be delegated to assist in the work required.
- **A — Accountable:** (also Approver or final Approving authority): The party ultimately accountable for the correct and thorough completion of the deliverable or task, and the one to whom Responsible is accountable. In other words, an Accountable must sign off (Approve) on work that Responsible provides. There must be only one Accountable specified for each task or deliverable
- **C — Consulted:** Those whose opinions are sought; and with whom there is two-way communication.
- **I — Informed:** Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.

Table 5. Project Management & Preparation Roles & Responsibilities

Roles and Responsibilities	Vendor	NSD
Project Management		

Roles and Responsibilities	Vendor	NSD
Provide guidance for establishing the PMO, policies and standards	C	R
Define and provide the approach (e.g., governance, methodologies, etc.)	C	R
Developing risk management plan	C	R
Risk assessment	C	R
Risk management oversight	C	R
Ongoing monitoring of project risks	R	A
Risk mitigation strategies and actions	R	A
Roles and Responsibilities	Vendor	NSD
Project Preparation		
Develop project goals and objectives, aligned to NSD strategy	I	R
Review and approve the scope of implementation	I	R
Establish the project structure and steering committees	I	R
Develop project charter	I	R
Define implementation strategy	C	R
Define the overall project schedule and implementation sequence	C	R
Define appropriate project standards and procedures	C	R
Approve appropriate project standards and procedures	I	R
Conduct technical and business planning sessions to establish and communicate standards and decisions, driven by the project initiative, in the key architecture areas (e.g., application, data, security, integration)	C	R
Develop the system landscape required for an implementation and ongoing operation of the implemented solution.	C	R
Develop initial business process change plan and change imperative statement	C	R
Approve design specifications standards and methodologies	C	R
Review and approve the initial Core Project Team training	C	R
Develop and implement a methodology for measurement of post-implementation benefits. This includes providing the tools for the collection of baseline data as well as post-implementation data.	C	R
Review and approve final project prep activities	I	R

Table 6. Requirements Analysis & System Design

Roles and Responsibilities	Vendor	NSD
Requirements Analysis & System Design		
Conducting interviews, group workshops and surveys	C	R

Roles and Responsibilities	Vendor	NSD
Facilitating consensus with NSD requirements groups and representative stakeholders	C	R
Validating requirements defined to date	C	R
Developing functional requirements documents and related data definitions and information flows that are required to supplement Student Information System documentation	C	R
Developing business rule descriptions and required documentation to help drive SIS configuration activities and facilitate knowledge transfer to NSD	C	R
Developing technical requirements documents to describe platform, architecture, and integration requirements for related solution components that are required to supplement software or hardware vendor documentation	C	R
Performing preliminary configuration to effectively align business processes where required	C	R
Defining end user training strategy	C	R
Defining organizational alignment and action/sponsorship plans	C	R
Organizational risk assessment based on defined approach and plan	C	R
Creating design documentation that specifies all solution application footprint components, project modules, data flows, interface components and associated operations procedures for the solution environment	C	R
Creating design documentation that specifies SIS configuration choices and recommended options according to the consensus business rules developed during the requirements definition	C	R
Creating design documentation to account for interdependent requirements from other NSD application or business process initiatives	C	R
Contributing current state business process and data-related technical knowledge materials and subject matter personnel to complete design specification documents and deliverables	C	R
Providing assistance, expertise, and resources to NSD in developing and gathering current state business process and data-related technical knowledge materials and subject matter personnel to complete design specification documents and deliverables	C	R
Contributing future state business process and technical knowledge and subject matter personnel who understand how the SIS solution can best be designed to improve business processes and achieve business benefits	C	R
Facilitating interviews, group workshops and surveys to obtain and gain consensus on design input	C	R
Designing solution technical environment through a technology plan based on NSD standards, architecture and project initiatives	C	R
Authorizing and approving technology plan through coordination with the appropriate NSD technology standards group or advisors	C	R

Roles and Responsibilities	Vendor	NSD
Defining SIS configuration and development standards and methodologies	C	R
Developing security and authorization requirements	C	R
Approving requirements definition documents and deliverables	I	R
Confirming that the Solution can technically and functionally support the design specification documents and deliverables	R	A
Approving design specifications documents and deliverables	I	R
Refining Project Plan components (Risk, Change Management, Data Conversion, Quality, etc.)	C	R
Installing the Solution system development, test, and training hardware and software in the appropriate facilities necessary to support the application development/configuration, integration and testing platform requirements, including any elements required for supporting any new or enhanced functions or features	C	R
Provide detailed information on how the system would need to be configured to support not just the expected load but to also allow for expansion for future load and specifically how that expansion would happen (what servers, services, configurations, network changes would be required).	R	I
Provide definition on how to monitor the system with the District's existing automated monitoring (Uptime). We will need them to define exactly what problems will look like (what error messages might be sent) so we can configure Uptime to recognize them.	R	C
Planning for data readiness activities	C	R
Developing a Data Identification, Conversion, and Migration Strategy	C	R

Table 7. Student Information System Environment

Roles and Responsibilities	Vendor	NSD
Acquisition		
Determining Bill of Material for all required purchases	R	A
Purchasing/procuring all computer hardware and systems software required to establish application integration and testing environment to meet NSD requirements.	C	R
Identifying all software licenses for any required software development tools, application programming and testing platforms, database software, application and Web server operating platforms, and any other software that is required to establish the necessary application integration and testing environment and ongoing production environment appropriate to meet NSD requirements	C	R
Purchasing/procuring all software licenses for any required software development tools, application programming and testing platforms, database software, application and Web server operating platforms, and any other software that is required to establish the necessary application integration and testing environment and ongoing production environment appropriate to meet NSD requirements	C	R
Setting IT and architectural standards and related acquisition policies and procedures	C	R

Roles and Responsibilities	Vendor	NSD
Conducting the necessary validation process required to ensure compliance to the Solution criteria for successful implementation.	R	A
Ensuring that all activities comply with the SIS Solution standards for the respective software release.	R	A
Complying with best practices IT standards and architectures and NSD acceptance processes	R	A
Approving all funding and acquisitions	I	R

Table 8. System Configuration, Development & Data Conversion

Roles and Responsibilities	Vendor	NSD
Setting up enterprise wide user roles and authorizations	C	R
Conduct data cleanup	C	R
Developing functional requirements documents and related data definitions and information flows that are required to supplement the SIS documentation	C	R
Coding of automated data conversions mapping, and loads into the SIS, using best practices tools and techniques that are consistent with the SIS provided architecture and development standards	C	R
Defining the SIS data warehouse and data model/requirement standards and methodologies (assumes use of standard, out-of-box reports)	C	R
Installing the SIS Infrastructure environment	C	R
Configuring baseline SIS	C	R
Coding interfaces with the SIS	C	R
Code custom localizations with the SIS	C	R
Coding enhancements to the SIS	R	R
Defining best practice tools and techniques wherever applicable	R	A
Coding automated data conversion loads into the SIS	C	R
Coordinating and executing manual data loads to the SIS	C	R
Verifying results of data loads to the SIS	C	R
Facilitating and leading configuration and development reviews	R	A
Establishing the overall parameters for standards, policies, and procedures for all integration and testing activities	C	R
Establishing SIS product-specific standards, methodologies, and tools for all integration and testing activities	R	A
Establishing SIS data and information management standards, methodologies, and tools to support integration and testing activities	C	R
Creating integration (end-to-end), user acceptance, stress and regression test plans that are fully documented and repeatable	R	A

Roles and Responsibilities	Vendor	NSD
Performing all appropriate life cycle testing (e.g., end-to-end testing, stress testing, regression testing, etc.)	R	A
Developing test data	C	R
Providing best practices to stage systems before production turn-over	R	A
Providing performance tuning of the SIS	R	A
Managing the operational facilities and overall test environment	C	R
Developing technical requirements documents to describe platform, architecture, and integration requirements	R	A
Establishing initial cutover and go-live plan	C	R
Conducting testing reviews and monitor/track issues, providing written results to NSD	R	A
Providing NSD subject matter expertise for development and testing	I	R

Table 9. Testing & Preparation for Solution Go-Live

Roles and Responsibilities	Vendor	NSD
Defining deployment criteria and delivery requirements	C	R
Performing data migration from existing systems to new systems, by either electronic or manual methods and performing selected integration and stress testing to validate that the solution is ready for production	C	R
Developing site-specific transition plans that encompass business process, operations, and organization alignment (Business and IT)	C	R
Finalizing risk management plan	R	A
Establishing ongoing production Support organization (IT and Business)	C	R
Delivering site-specific system and user documentation	R	C
Conducting pre-installation site surveys to assess site readiness against a set of best practices checklist criteria	R	A
Reviewing readiness of cutover deliverables	C	R
Training and Change Management activities to ensure NSD Readiness	C	R
Completing final installation of SIS and non-SIS infrastructure	C	R
Migrating data from existing systems to new SIS	C	R
Conduct system performance and load testing	R	A
Performing user acceptance testing to validate that the SIS is ready for production	C	R
Approving and sign-off on all site-specific migrated data	I	R
Coordinating deployment and support activities with NSD and site management teams	C	R
Conducting post-implementation acceptance tests	I	R

Roles and Responsibilities	Vendor	NSD
Reviewing/approving post-implementation acceptance test results	I	R
Approving production implementation “Go/No-go” decisions	C	R

Table 10. Migration & Support

Roles and Responsibilities	Vendor	NSD
System fixes to correct system level performance problems	R	A
Data fixes to correct improperly converted files or tables	C	R
Data fixes to correct translation or load errors for interfaces	C	R
Data fixes to correct update errors from application configuration or parameter table settings that are not consistent with the intended design	C	R
Training fixes to correct interpretation and documentation errors related to user or technical training documentation or other training delivery media.	C	R
Performing appropriate shutdown activities for converted systems	C	R
Conducting Lessons Learned activities	R	C
Implementing support organization transition	C	R
Updating all documents associated with the Warranty Service fixes, as defined in the migration and support section of the SOW	R	A
Providing personnel to manage Warranty Service requests and related tracking through resolution and sign-off	R	C
Approving all Warranty Service fixes with formal sign-off	I	R
Providing help desk management personnel to approve the transition plan and to accept responsibility for ongoing applications maintenance services that will be provided by the appropriate party	I	R
Providing business and data management liaison personnel to approve the transition plan and to accept responsibility for ongoing relationship management of the vendor-provided help desk and overall application management services, if applicable	I	R

Table 11. Organizational Change Management

Roles and Responsibilities	Vendor	NSD
Training and Organization Change Management (OCM)		
Training and Change Management Strategy & Objectives	R	A
Developing training plan, material, logistics and schedule	C	R
Change Management Training/Knowledge Transfer	C	R
Executing Training and OCM plan	C	R
Audience/Trainee Analysis	C	R
Technical Administrator Training	R	A

Roles and Responsibilities	Vendor	NSD
Super User Training	R	C
Process/Module Owner Training	C	R
Train the trainer approach	C	R
Communication Process	I	R
Key Messages	C	R
Communication Vehicles	C	R
Communication Schedule/Frequency	C	R
Change Management Metrics	R	A
Organizational Transition (e.g., training, new process flows, reclassification,)	C	R

Table 12. Third Party Products

Roles and Responsibilities	Vendor	NSD
If the Solution includes an API, the vendor will provide specifications and assurances the API will function as documented	R	C
Defining business requirements, developing design and implementing end-to-end business processes using the Solution and Third Party software	C	R
Developing/providing training and knowledge transfer to NSD in order to properly configure, support, and maintain Third Party software	C	R
Configuring the Solution to integrate with Third Party software	C	R
Providing testing and integration services required on Third Party software implementation	C	R
Performing go-live to production	C	R

Table 13. Compliance & Regulations

Roles and Responsibilities	Vendor	NSD
Compliance and Regulations		
Assessing the SIS for all regulatory mandates affecting NSD	C	R
Documenting service-level objectives and requirements	R	A
Defining and approving overall operations and administration policies	C	R
Defining and approving overall technical support policies and procedures	C	R
Providing recommendations to comply with regulatory and compliance requirements	C	R
Approving recommendations	I	R

6.0 Deliverables

NSD expects Vendor to provide project leadership, oversight, direction and full accountability for Vendor contributions to the creation of deliverables.

A complete list of deliverables will be inserted in this section based on results of the negotiation process between selected Vendor and NSD. The final deliverables included within the design phase will set forth an updated list of deliverables for the remainder of the Project based upon the Vendor's methodology. The Vendor will create or implement, in all material respects, the deliverables (or portions of the deliverables) for which it is assigned responsibility in accordance with such specifications, criteria, and descriptions. NSD reserves the right for review and modification of each of these deliverables.

For repeated deliverables, Vendor will provide NSD with approach documentation and templates at least two weeks prior to the initiation of work on these Deliverables.

A preliminary list of deliverables is as follows:

- Project Scope
- Project Work Plan and Timeline
- Resource Plan and Vendor and NSD Staff Roles & Responsibilities
- Project Organization Structure
- Communication Plan
- Risk Identification and Mitigation Plan
- Implementation Strategy
- Testing Strategy
- Project Status Reporting
- Training Requirements Analysis, Plan, Materials, Curriculum and Execution
- Business Process Analysis
- Functional/Application Requirements and Requirements Traceability Matrix
- Fit/Gap Analysis
- End Solution Design, Configuration, Customization and Modifications Plan and Documentation
- System Interface Design
- Change Control Process
- RICEF (Reports, Interfaces, Conversions, Enhancements, Forms)

- Technical Environment Documentation
- Updated Project Plan
- Test Data and Configuration
- Data Conversion and Migration Plan
- Testing and Staging Environment
- Production Environment
- Performance & Stress Tests
- User Acceptance Test Plan
- Deployment and Cutover Plan and Execution
- Complete Technical System Documentation
- Complete System User Documentation
- Technical Support Plan
- End User Support Plan
- System Maintenance and Upgrade Plans

6.1 Acceptance of Deliverables

At the beginning of a milestone, the project team will determine which deliverables are subject to approval and will develop appropriate acceptance criteria. Both NSD and Vendor Project Managers or their designees shall review those Deliverables which have been identified for approval within five (5) Business Days after receipt of a Deliverable from Vendor and ten (10) Business Days in the case of a final draft or version of a Deliverable. The NSD Project Manager or designee shall notify the Vendor Project Manager and assigned Project Team resources in writing as to any specific changes requested (together with a reasonably detailed explanation of the reasons why the Deliverable should be modified). Failure to give such notice within the required time period shall be deemed to mean that the Deliverable is accepted. The assigned Project Team resources shall make all agreed changes described in the notice at the earliest appropriate date so as to not materially adversely impact the schedule under the Project Schedule and, upon completion of such changes to NSD's reasonable satisfaction, the Deliverable shall be deemed accepted.

7.0 Project Milestones

Project milestones will be defined as shown in table below and will be deemed achieved after the Deliverables for such Project Milestones have been accepted (or the Project Managers have agreed that any un-accepted Deliverables can be finalized and accepted as part of a later Project Milestone) and the activities and tasks identified in the Project Schedule as necessary to complete such Project Milestone

have been completed. Promptly after notice from either Project Manager that a Project Milestone has been achieved, the Project Managers will advise the Project Governance team of such and, if requested, review the status of the Project.

Table 14. Project Milestones

Vendor should complete the following chart based the proposed Project Plan, Deliverables and Milestones (as described in the Vendor Response Document) based on the understanding of the project as of the vendor response submission date and will be finalized at contract negotiation

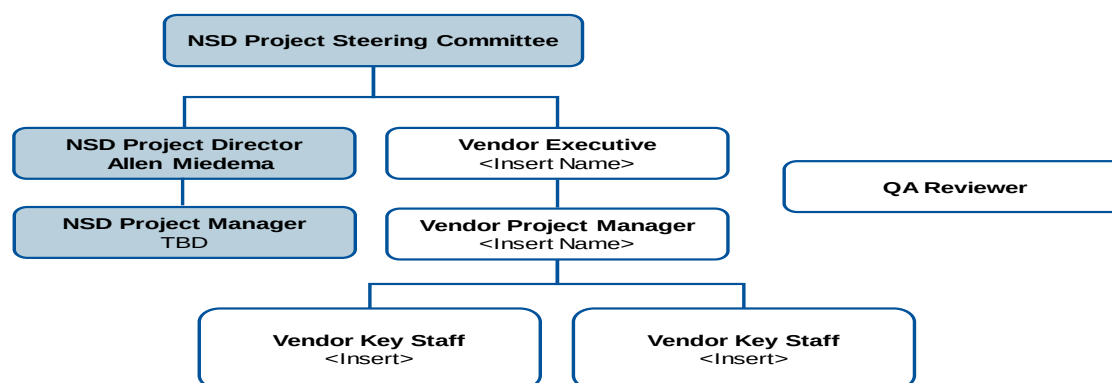
Milestones	Milestone Criteria/Checkpoints	Deliverables	Estimated Completion Date

8.0 Project Resources

For the purposes of this SOW, the Project consists of NSD resources and Vendor resources described below. Staffing plan and changes to the staffing plan will be managed under the Change Control Procedures. Vendor and NSD will staff the Project as provided in the staffing plan to perform the activities and develop the Deliverables outlined in this SOW.

The NSD project organization structure is designed to empower the NSD project team to the greatest extent possible. Refer to Figure 1. NSD Project Organization below. The majority of project related decisions will be made by the Project core teams. Strategic decisions and major project directional decisions will be made at the higher levels. Refer to Table 18. NSD Project Team Profile for description.

Figure 1. NSD Project Organization



The following Table describes the primary NSD resources that will be part of the overall project team and report to the NSD Project Manager. Additionally, there will be several secondary resources (part time business and technical resources available — not listed below) on an “as needed” basis at the discretion

of the NSD PM. All requests for additional NSD resources (part time or full time) will be channeled through the NSD PM.

Table 15. NSD Project Team Profile

#	Role	Description	Type
1	NSD Project Director	Coordinates reporting Project status to the project Steering Committee, oversees budget, directs the activities of the project manager, holds the team accountable.	Business
2	NSD Project Manager	Responsible for overall Project management and coordination between the Vendor and NSD resources.	Business
3	Business Analysts	Manager, Deployment and Training Primary link into the specific business area. Responsibilities include: - Assists in the development and execution of stakeholder engagement plans for the project. - Owns the business case for the deployment area. - Participates and acts as a subject matter expert (SME) during detailed design and approves any recommendations for changes in the original design - Ensures business readiness for Go-Live - Performs functional tests of the system from several perspectives: end user, power user and interface operation.	Business
4	Trainers	Application Systems Trainer responsible to provide user training and to train the district resource that will train end users (employees)	Business
5	System Administrator	Maintains and operates the system installing, supporting and maintaining servers. Responds to outages and other problems	Technical
6	Director Network Services	Directs the work of the system administrators.	Technical

#	Role	Description	Type
7	System Analysts	Insures data integrity, supports interface transaction. Designs and maintains the interface between the third party software and current SIS. Develop and execute data extracts, transformations and loads into the SIS	Technical

8.1 Vendor Project Team Resources

Oversight/Quality Assurance

Vendor will maintain a team of senior IT and business professionals to monitor Vendor's performance under this SOW and communicate such findings to the Project Governance Board.

Team Structure and Roles

Vendor shall provide the Project Team members identified in Vendor's proposed staffing plan, as completed in Attachment A4 - Proposed Solution & Staffing Plan (MS-Excel). Such Project Team members shall (a) perform the roles, responsibilities and activities described the project staffing plan as the same may be modified and prioritized during the Project and (b) create or assist in creating the Deliverables for which they are assigned sole or shared responsibility.

- **Project Director** — Vendor Project Director will be Vendor's primary point of contact for all matters relating to this SOW. In addition to other requirements that may be set forth in the Contract or this SOW, the Project Director shall be: (a) knowledgeable about the Services and each of Vendor's and its subcontractors' products and services; and (b) experienced at running projects of a size and scope comparable in size and scope to that of the Project. The individual selected for this SOW is set forth in the final Project Organization & Governance.
- **Project Manager** — Vendor will designate one individual to manage the day-to-day delivery of Services. The individual selected for this SOW is set forth in the final Project Organization & Governance.
- **Work-Stream/Function Lead(s)** — Vendor will designate individuals to serve as leaders of each of the work-streams or process areas as set forth in the final Project Organization & Governance
- **Vendor Principals, Directors, Senior Managers and Managers** — NSD has the right to review resumes and conduct phone or in-person interviews with any Partners, Principals, Directors, Senior Managers and Managers in key roles (as determined by the NSD and Vendor Project Management Leads) proposed for staffing on this SOW.

Subject Matter Experts (SMEs)

- Vendor will make reasonable efforts to provide SMEs available to NSD, as requested, on a timely basis.

Holiday Schedule

- Vendor will adjust its holiday schedule applicable to its resources performing Services under this SOW to be consistent with NSD's so as to minimize the impact on the Project.

Additional Vendor Responsibilities Regarding Vendor Project Team Members:

- Vendor shall identify and allocate its Project Team members in a timely manner to support adherence to the Project dates.
- Vendor Project Team members shall be capable and competent.
- Subject to the Change Control Procedures established, Vendor shall deploy any additional required Project Team members required for the performance of the Services.

9.0 Payments & Incentives

- Professional fees associated with the Services to be performed under this SOW will be on a Fixed Fee basis.
- The Fixed Fee is based on the nature and scope of the work, the expected resource requirements, resource commitments from NSD, the anticipated duration and scope of the Project, and a set of Project Assumptions, all as described elsewhere in this SOW.
- NSD reserves the right to renegotiate the implementation/deployment and post implementation phases at the completion of the Design/Configuration Phase.
- Vendor shall submit invoices for professional services according to the milestone invoice schedule to be set forth during contract negotiations.

STUDENT INFORMATION SYSTEM

ATTACHMENT A2

CERTIFICATION

Pursuant to and in compliance with this Request for Proposal and all documents relating thereto, the undersigned hereby offers to furnish and deliver any or all of the articles enumerated at the prices quoted herein.

Organization Information

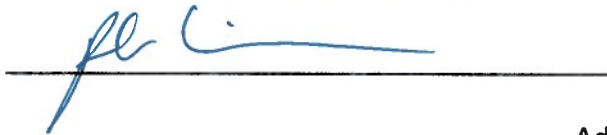
Legal Firm Name

Edupoint Educational Systems, LLC

Printed Name and Title

Rob Wilson, President and Chief Innovation Officer

Authorized Signature



Date

12/4/13

Address

1955 S. Val Vista Drive, Suite 200

City, State, Zip Code

Mesa, AZ 85204

Telephone

480-633-7500

Fax Number

480-633-7501

Email Address

rwilson@Edupoint.com

Acknowledge receipt of addendum # 1 through 1.

	Response
SIS Proposing VENDOR NAME	Edupoint Educational Systems
Vendor Company Headquarter Address and Telephone Number	1955 S. Val Vista Drive, Suite 200, Mesa, AZ 85204 480-633-7500
Total Revenue in 2012	As a privately held company, Edupoint as a practice does not release its annual report or financial statements in a public bid document as these become available for public review. Financial information will be provided during the negotiations stage and identified as confidential information.
% of revenue from clients in K-12 Education.	100%
% of revenue from K-12 Student Information Systems	100%
% of revenue from Other Solutions	0%
Please attached Audited Financial Statements	An edited copy of our most recent financial statement is included in this section of our proposal.
Number of Service Delivery Employees	Of Edupoint's 140 staff members, 40 are customer support and service delivery personnel.
Number of Employees providing Integration Services	Edupoint currently has 34 staff members providing professional services.
List of Locations in North America	Edupoint has two locations in North America - Corporate Headquarters in Mesa, AZ, and California Headquarters in Irvine, CA.
List of Locations in Other Geographies	n/a
Vendor's Staff Primary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	Stephen Mairs, Northwest Regional Manager 1955 S. Val Vista Drive, Suite 200 Mesa, AZ 85204 (480) 633-7554 - Direct (480) 369-6435 - Mobile SMairs@Edupoint.com

Vendor's Staff Secondary Contact Information: Name, Address, Telephone (Fixed & Mobile), Email Address	Christine Moss, Vice President, Marketing 1955 S. Val Vista Drive, Suite 200 Mesa, AZ 85204 (480) 633-7550 - Direct (480) 250-3181 - Mobile CMoss@Edupoint.com

Note: References provided will be contacted by the District

	Reference 1 (Required)	Reference 2 (Required)	Reference 3 (Required)	Reference 4	Reference 5	Reference 6
School District Name (Reference)	High Desert Education Service District (Member of Oregon SIS Consortium)	Federal Way Public Schools	Wichita Public Schools			
Version of Proposed SIS Solution Implemented	Synergy 8.0	Synergy 8.0	Synergy 8.0			
Scope of Services Provided	Synergy SIS, Synergy Special Education (SE), Gradebook, ParentVUE / StudentVUE	Synergy SIS, Master Schedule Builder (MSB), TeacherVUE, ParentVUE / StudentVUE	Synergy SIS, Synergy Special Education (SE), Gradebook, LessonVUE, Master Schedule Builder (MSB), ParentVUE / StudentVUE			
Contract Size (\$) Estimate	confidential	confidential	confidential			
Project Start Date	November 1, 2011	September 1, 2012	October 1, 2012			
Project Completion Date (if in progress, state expected Completion Date)	August 2012 go-live	July 2013 go-live	July 2013 go-live			
Contract Term	ongoing	ongoing	ongoing			
Reference Contact Name and Title	Rachel Wenten-Chaney, Chief Information Officer	Sally McLean, Assistant Superintendent - Business Services	Cathy Barbieri, Chief Information Officer			
Reference Contact Telephone Number	(541) 693-5636	(253) 945-2042	(316) 973-4207			
Reference Contact Address	145 SE Salmon Avenue Redmond, OR 97756	33330 8th Avenue South Federal Way, WA 98003	201 N. Water Wichita, KS 67202			
Reference Contact E-mail	rachel.wenten-chaney@hdesd.org	smclean@fwps.org	Cbarbieri@usd259.net			
Technical Reference Contact Name and Title	Rachel Wenten-Chaney, Chief Information Officer	Ron Mayberry, Executive Director Instructional Technology	Cathy Barbieri, Chief Information Officer			
Technical Reference Contact Telephone Number	(541) 693-5636	(253) 945-2110	(316) 973-4207			
Technical Reference Contact Address	145 SE Salmon Avenue Redmond, OR 97756	33330 8th Avenue South Federal Way, WA 98003	201 N. Water Wichita, KS 67202			
Technical Reference Contact E-mail	rachel.wenten-chaney@hdesd.org	rmayberr@fwps.org	Cbarbieri@usd259.net			
Names of Vendor's Manager and Project Manager	Steve Mairs - Engagement Manager Veronica Lopez - Project Manager	Steve Mairs - Engagement Manager Sean Pyatt - Project Manager	Steve Mairs - Engagement Manager Sean Pyatt - Project Manager			

	Subcontractor 1	Subcontractor 2	Subcontractor 3
SUBCONTRACTOR NAME	n/a	n/a	n/a
Type of Legal Entity	n/a	n/a	n/a
Company ownership (i.e., private/public, joint venture)	n/a	n/a	n/a
Jurisdiction of Company Formation	n/a	n/a	n/a
Headquarters Location	n/a	n/a	n/a
Date Founded	n/a	n/a	n/a
Number of employees	n/a	n/a	n/a
Audited financial statements (last three years)	n/a	n/a	n/a
Proposed Products or Services to be provided	n/a	n/a	n/a
Experience of subcontractor in performing the services to be provided	n/a	n/a	n/a
Brief description and number of projects that Implementation Partner has partnered with this subcontractor	n/a	n/a	n/a
Locations where work to be performed	n/a	n/a	n/a

	Project 1 (Required)	Project 2 (Required)	Project 3 (Required)
School District	Rialto Unified School District	Beaverton School District	Clackamas Education Service District
Scope of Services Provided	Synergy SIS, Gradebook, ParentVUE / StudentVUE	Synergy SIS, Synergy Special Education (SE), Synergy Technology (ST), Gradebook, ParentVUE / StudentVUE	Synergy SIS, Synergy Special Education (SE), Gradebook, ParentVUE/StudentVUE
Version of Proposed Solution Implemented	Synergy 8.0	Synergy 8.0	Synergy 8.0
Contract Size (\$) Estimate	Confidential	Confidential	Confidential
Project Start Date	May 22, 2013	April 25, 2012	May 15, 2012
Project End Date (if in progress, state expected End Date)	August 2013 go-live	August 2012 go-live	July 2013 go-live
Contract Term	ongoing	ongoing	ongoing
Contact Name and Title	Beth Anne Scantlebury, Chief Technology Officer	Steven Langford, Chief Information Officer	Stuart Long, Chief Information Officer
Contact Telephone Number	(909) 820-7700 x2600	(503) 591-4416	(503) 675-4000
Contact Address	182 East Walnut Avenue Rialto, CA 92376	16550 SW Merlo Road Beaverton, OR 97006	13455 SE 97th Avenue Clackamas, OR 97015
Contact E-mail	bscantle@rialto.k12.ca.us	steven_langford@beaverton.k12.or.us	slong@clackesd.k12.or.us
Names of Vendor Engagement Manager and Project Manager	Steve Mairs - Engagement Manager Veronica Lopez - Project Manager	Steve Mairs - Engagement Manager Sean Pyatt - Project Manager	Steve Mairs - Engagement Manager Sean Pyatt - Project Manager

Project 4	Project 5

	Previous Client 1	Previous Client 2	Previous Client 3
School District	n/a	n/a	n/a
Scope of Services Provided			
Version of Proposed Solution Implemented			
Contract Size (\$) Estimate			
Project Start Date			
Project Stop			
Contract Term			
Contact Name and Title			
Contact Telephone Number			
Contact Address			

At Edupoint, we're proud of our 99% customer retention rate, and we know the quality and dedication of our support services contribute a great deal to that success. Edupoint Educational Systems, LLC affirmatively declares that we have not experienced a settlement or termination for default on products or services performed and that there is no pending litigation. The only loss in our customer base has been from the natural movement by districts being serviced by our regional service center customers, where a district decides to acquire SIS services from another entity, and this attrition has been very minimal. Each and every school district receiving direct support from Edupoint remains a current customer.

STUDENT INFORMATION SYSTEM

ATTACHMENT A4

COOPERATIVE PURCHASING INFORMATION

In the event another area school district or public entity has the need for the same product or services, they may wish to utilize another executed bid in the area. RCW 39.34 allows cooperative purchasing between public agencies in the State of Washington. Public agencies that have, or in the future file an Interlocal Cooperative Purchasing Agreement with the District may purchase from the District's contracts, provided that the Bidder has agreed to such participation.

Each school district or public entity would act as an independent agency and take responsibility for its own purchase orders, payment procedures, evaluations, and scheduling of Bidder's services. Each entity will also take responsibility for performance of any purchasing contract with Bidder. The District will not have any responsibility or liability for orders issued by other public agencies utilizing the District's contract through an Interlocal Agreement.

Bidders' responses to allow cooperative purchasing will not have any weight in the evaluation process for this request for proposal nor will they be evaluated negatively if they choose to not participate in an Interlocal Agreement.

Each Bidder shall indicate on this form whether it will honor the pricing and terms and conditions to other public agencies in accordance with this Agreement's terms and conditions.

As per the terms and conditions of this contract, will the Bidder allow public agencies in addition to Northshore School District to purchase from this contract?

Yes ☒ No ☐ (check one)

If yes, Bidder will have opportunity to review ability to perform/deliver to requesting agencies prior to commencement of services.

Vendor Proposed Staffing Plan

Instructions: Vendor shall provide number of FTEs based on proposed approach. This should tie in with Cost Proposal FTEs from Cost Proposal Workbook (MS-Excel). Vendor must modify/add similar sheets as necessary or applicable and indicate any off-shore staffing.

Please format spreadsheet to meet space requirements.

Project Wave				2014									
				Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10
Project Management & Preparation													
Requirements Analysis & Design													
Solution Implementation													
Testing & Preparation for System Go-Live													
Go-Live & Deployment													
Pre-Stabilisation & Post Go-Live Support													
Organizational Change Management Support													
yes													
	Team	Project Role	Days Allocated for Phase	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9	Mo 10
Edupoint has based its staffing plan on the SOW milestones which also match our implementation methodology and pricing milestones. These numbers represent service days.													
SIS Project Milestones Per the SOW				0	0	0	0	0	0	0	0	0	0
SIS Vendor Selection and Contract Negotiations		2/12/2014		0	0	0	0	0	0	0	0	0	0
Project Planning	2/12/2014	3/14/2014	24	10	5	5	1	1	1	0.5	0.5	0	0
Application Setup and Configuration; Organization & Business Process Review	3/6/2014	5/2/2014	26	0	5	15	5	1	0	0	0	0	0
System Configuration & Installation	2/12/2014	3/12/2014	2	0	2	0	0	0	0	0	0	0	0
Data Conversion	2/27/2014	7/25/2014	9	0	3	3	2	1	0	0	0	0	0
External Interface Development	3/26/2014	7/25/2014	4	0	0	1	2	0.5	0.5	0	0	0	0
System Testing (includes setup validation, data conversion validation, interface testing and go-live readiness system testing)	5/2/2014	6/13/2014	5	0	0	0	5	0	0	0	0	0	0
Train the Trainer Training	3/17/2014	4/10/2014	32	0	10	20	2	0	0	0	0	0	0
Standards Based Customized Report Card Development	5/15/2014	6/15/2014	8	0	0	0	6	2	0	0	0	0	0
Deployment	5/2/2014	8/4/2014	5	0	0	0	1	2	2	0	0	0	
Cut-over to Final Production System		7/31/2014		0	0	0	0	0	0	0	0	0	0

Please format spreadsheet to meet space requirements.

Proposed Software Solution								
List all item software included and necessary to operate the proposed Student Information System solution. List should match cost proposal line items. Note: Add more lines as necessary.								
Item #	Required/Optional	Core Package Name	Module/Application Name	Version/Release	Operational/ Included in Proposal and Can be demonstrated to District (Y/N)	Proposed No. of Licenses	Date First Installed	Installed Sites (or Indicate Client Reference)
1	Synergy SIS	Synergy SIS	Synergy SIS	8.0 (9.0 when implemented)	Y	districtwide	2004	All current clients operating 8.0
2	TeacherVUE Gradebook	TeacherVUE Gradebook	TeacherVUE Gradebook	8.0 (9.0 when implemented)	Y	districtwide	2007	All current clients operating 8.0
3	ParentVUE/StudentVUE	ParentVUE/StudentVUE - web portals and mobile applications	ParentVUE/StudentVUE	8.0 (9.0 when implemented)	Y	districtwide	2010	All current clients operating 8.0
4	Master Schedule Builder	Master Schedule Builder	Master Schedule Builder	8.0 (9.0 when implemented)	Y	7-12 (mass scheduling available districtwide; MSB designed for large campuses with complex scheduling and resource constraints)	2011	All current clients operating 8.0
5	Online Registration	Online Registration	Online Registration	Available in 9.0	Not yet released but can demonstrate beta version	districtwide	available for implementation in spring 2014	New module; not yet released
6	Synergy State Reporting	WA State Reporting	WA State Reporting	8	Y	districtwide	2013	Y - Federal Way Public Schools

Proposed System Software					
List all item system software included and necessary to operate the proposed Student Information System solution. Note: Add lines as necessary.					
Item #	Component	Specification	Qty *	Use (e.g., Development, Testing, Training, Production, etc.)	Included in Proposal or Optional?
1	Windows Server Lic	Microsoft Windows Server 2012 Standard 2 Processors (Used to downgrade to 2008R2 Ent)	13	Production	Included in Proposal
2	Windows Server Lic	Microsoft Windows Server 2012 CAL (Suggestting 5 CALs per Server)	65	Production	Included in Proposal
3	SQL	Microsoft SQL 2012 Enterprise 2 Core Lic with 4 Core minimum	8	Production, Training, Test	Included in Proposal
4	SSL Certificate	Thawte ssl cert	1	Production	Included in Proposal

Notes:
* Include number of licenses, seats, etc., depending on licensing methodology
Add more lines as necessary; this should match cost proposal line items

Proposed Supplemental Software							
Provide complete description of any supplemental software/products required for proposed solution. Supplemental components may include development tools, configuration management tools, etc., required or optional in order to meet BVSD requirements. Note: Add more lines as necessary.							
Item #	Supplemental Package Name	Description of Business Requirement/Purpose	Required or Optional?	Qty	Use	Most Recent Installation Date	Installed Site(s) or Client Reference
1	None required						

Please format spreadsheet to meet space requirements.

Summary of Recommended Hardware				
Recommend all hardware infrastructure necessary to ensure successful implementation and on-going operation of proposed solution for a minimum of one year following completion of implementation. Note: Add more lines as necessary.				
Item #	Component	Specification	Qty	Use (e.g., Development, Testing, Training, Production, etc.)
	Servers			
	Database Server	Dell PowerEdge R820, 2 x Eight Core Intel Xeon E5-4640 2.40GHz, 96GB Memory, OS 2x146GB 15K Harddrive Raid1, Data 10 x 300GB 15K Harddrive Raid10	1	Production, Training, Test
	Staff Web Servers	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid1	4	Production
	Process Servers	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid1	2	Production
	Parent/Student Web Server	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid1	1	Production
	Test Web/Process Server	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid1	1	Test
	Network Components			
	Other (specify)			
	Load Balancer	Kemp LoadMaster 2600	1	Production
	Switch	Dell PowerConnect 5548 Switch, iSCSI, 48GbE PortsManaged Layer 2	2	Production, Training, Test

Response Instructions to Functional Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	Requirement will be met through changes to the existing reports or programs. This would include custom code developed to perform specific functions or validations outside the standard code. Include the creation of a new report, query of workflow that does not exist within the current solution. Note: In the Comments column next to this response, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Modification	M	Requirement will be met through changes to the source code which would require analysis and re-application during future updates, upgrades, or when applying software patches.
Supplied by Third Party	3	Requirement will be met by third-party software package and is included in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.

Note:

1. An omitted response will be assumed to be the same as a response code of "N".
2. Any deviation from the response codes will be re-coded at the discretion of NSD.

In this Worksheet there are 18 Tabs. Each must be completed with codes above.

1 Mandatory Requirements

- 2 General Functional Requirements
- 3 Registrations
- 4 Attendance
- 5 Scheduling
- 6 Grading
- 7 Transcripts
- 8 Graduation Requirements
- 9 Special Programs
- 10 Special Education
- 11 Student Behavior
- 12 Student Health
- 13 Fines and Fees
- 14 Assessments
- 15 Administrator Portal
- 16 Teacher Portal
- 17 Parent - Student Portal
- 18 State Reporting

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Mandatory Requirements	Priority	Y	C	M	F	3	N	
1	The solution the Vendor is proposing must have been used and responsible for a successful installation for all state reports for the entire school year for the 2012-2013 school year. The school district using the system must have had a student enrollment of comparable size (30k students and 3k staff) to the District.	Mandatory	X						
2	Vendor must have been in business for at least three years and must be able to provide evidence of active installations, including at least one in a school district of comparable size of the District.	Mandatory	X						
3	The application software must be a web-based solution specifically developed to run in the Web environment. This means that all of its functionality must be accessible via a Web browser.	Mandatory	X						
4	The Vendor and the software must support the latest browsers.	Mandatory	X						
5	The solution provides a district-wide database for all student information with access to the historical as well as the current school year's data, and the ability to work with next year's data for scheduling purposes.	Mandatory	X						
6	The vendor's licensing agreement must allow for the granting of a perpetual license for the use of their software.	Mandatory	X						
7	The system must have multi-user capabilities so as to allow multiple users access to the application at the same time without any record-contention issues.	Mandatory	X						
8	The vendor must have the capability to provide for custom changes or additions to the software to accommodate the business practices for the District.	Mandatory	X						
9	The vendor must have the capability to update and maintain the software for Federal, State Department of Education and the District's reporting compliance and accomplish this in a timely manner.	Mandatory	X						
10	The vendor must describe a project approach and propose a project manager for this project and the project manager is expected to be onsite during critical parts of the project as defined by the District.	Mandatory	X						
11	Users have access to the entry of next year data and to perform the next year scheduling activities.	Mandatory	X						
12	The application software must be designed for on-line, real time processing.	Mandatory	X						
13	Solution must provide an integrated report writer that provides ad hoc capabilities to end users with the ability to extract data. The report writer functions should also provide the ability to limit (i.e., allow or prevent) access to student information based on the appropriate security.	Mandatory	X						Through Query and SIREN reporting tools.
14	The user interface must provide field level validations as the users are entering data into fields on a given page as needed.	Mandatory	X						
15	The system should allow single update access but simultaneous multiple inquiry access. For example, two people should be able to view the same screen at the same time, but only one should be able to make changes. System should support large scale concurrent usage.	Mandatory	X						
16	The system's web screen design should conform to the standards for the Americans with Disabilities Act (Section 508).	Mandatory	X						
17	The system supports screen-based security.	Mandatory	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	General Functional Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides a consistent user interface to include screen layouts, report layouts, messages, field labels and data display.	High	X						
2	The system provides access to on-line help regarding screen or field description and its intended use. The help should include warnings, examples and error messages when appropriate. The system provides the ability to customize the help with district specific items.	High	X						
3	The system help is context-sensitive.	High	X						
4	The system provides on data entry, where appropriate, default values for fields.	High	X						
5	The system provides the ability to modify existing default values.	High	X						
6	The system provides utilities and/or tools for importing and exporting database data.	High	X						
7	The system provides the ability for 5000 employees to have concurrent access to the system.	High	X						
8	The system provides the capacity to support access for over 30,000 students and parents.	High	X						
9	The system provides the ability for data input via multiple devices to include, but not limited to keyboard and mouse, scanners, and mobile devices.	High	X						
10	The system provides the ability to utilize multiple types of printers to include, but not limited to inkjet, laser, and plotters.	High	X						
11	The software shall be user friendly and operate in a manner that allows school personnel to manage their daily business processes.	High	X						
12	The reports must be easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report), and exported to a file.	High	X						
13	The system provides a consistent user-interface, with similar front-end questions prior to producing a report.	High	X						
14	The application should provide for on-line notepad type features that allows the user to freely input narrative data as appropriate.	High	X						
15	The system provides a comprehensive reporting tools that allows all data within the system to be reported with any other piece of data within any of the other software modules proposed.	High	X						
16	The size of the database must have the capability to maintain the legal retention schedule for records of public school districts (e.g. transcripts permanently, attendance records for seven years, etc.)	High	X						
17	The system allows reports to be viewed, printed, and saved via Adobe Acrobat. (PDF format)	High	X						
18	The system provides for multiple environments (i.e. for production, testing, training and development).	High	X						
19	The system provides for data entry assistance by providing pull-down lists to help user select valid codes for fields where this would be applicable.	High	X						
20	The system provides online help that pertains to the screen and field being accessed. The help should include warnings, examples, and meaningful error messages when appropriate.	High	X						
21	The system provides for easy addition of district-defined screens along with their field definitions. The authorized user may define field description, data type, data length, help text, default value, and validation tables. These fields are available for searches, for reporting, and program tracking.	High	X						
22	The system provides basic report writer capabilities to access student information in a variety of formats such as PDF, Excel, txt, or csv format. The user may display the report to the screen, print to printer, import to Excel, send via email, or store on disk.	High	X						
23	The system should allow for mass updates to certain fields (to make replacements directly in database) so that quick updates can be made by properly authorized system users.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	General Functional Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
24	The system provides adequate security access to data-altering utilities and editors to authorized personnel only.	High	X						
25	The system provides security in such a way that users only see only the menu options for which they have been authorized.	High	X						Yes, Synergy security features ensure the highest level of data security available, including: • Comprehensive access management by user, role, school, group of schools, or district, and by screen, tab or field • Several levels of data access (no see, read only, update, allow add, etc.). • Transaction auditing • Time / day access restrictions
26	The system allows each user to define their own favorite menu options to facilitate efficient access to menu options.	High	X						
27	The system allows query results to be saved to a Microsoft Excel spreadsheet.	High	X						
28	The system allows the individual users to have an initial page tailored to their individual needs, with access to favorites, scheduled tasks, completed tasks, and reports, etc.	High	X						
29	The system provides error messages in a consistent format across all system modules, for both batch and online processing. Specifically, error messages have common error codes, similar text, and are displayed in a similar fashion.	High	X						
30	The content of error messages should be customizable to be district-relevant and enhance the meaning of the message and direction provided to the user.	High	X						
31	The system provides error messages that are integrated with the online help function. For example, the data entry person should be able to click on an error message and open the online help document to the appropriate page.	High	X						
32	The system should provide online help features for all screen elements (fields and screen error codes) explained in plain English.	High	X						
33	The system provides the ability to add sound effect to error display.	Low						X	
34	The system provides spell checking for all free text fields.	High	X						
35	The system allows validation tables to be maintained as specifications change. Obsolete values may be flagged as "Inactive" so that historical data integrity is maintained and are removed from user drop down lists.	High	X						
36	The system allows dates to be entered in a variety of formats throughout the system, with or without using a pop-up calendar.	High	X						
37	The system allows during data entry, for users to be able to utilize recurring data entry tools including templates, copy, and paste functionality.	High	X						
38	The system allows menus to be defined by administrative personnel to support the District's business processes.	High	X						
39	Users can search and report data by using drop-down options that include comparison operators such as: = (equal to), < (less than), > (greater than), <= (less than or equal to), <> (not equal to), : (range), and * (wildcard).	High	X						
40	The system allows the user to query on any field in the SIS database for which he/she has been authorized.	High	X						
41	The system provides a menu bread crumb trail to facilitate navigation to all options of the system.	High	X						
42	The system groups screens logically by function to facilitate data entry.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	General Functional Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
43	The system should have the ability for a user to concurrently open multiple sessions/windows for both inquiry and updating with access to any combination of application modules, without losing any data previously entered on an open screen.	High	X						
44	The system provides a user customizable screen to view and update student information in a format similar to the District's enrollment form.	High	X						
45	The system provides the ability for a student picture to appear on many pages.	Medium	X						Student photographs appear on the Student Screen and on the TeacherVUE portal.
46	The system provides a student alert message which will appear or flag a student whenever the student is included in a search list, or displayed on a screen.	High	X						Synergy provides the ability to automatically alert the end user of a concern for the student, such as custody and medical. An unlimited number of notifications may be defined by district personnel and then assigned to students and maintained by site personnel.
47	The system is fully integrated - all areas of the application are fully integrated with all other areas, eliminating the need for redundant data entry.	High	X						
48	The system allows for scanning hard copy documents (birth certificate, vaccination forms, cumulative records, enrollment forms etc.) and linking them to corresponding student record (Document Imaging). Scanning should be processed locally.	Medium	X						
49	The system allows letters to be generated in multiple languages.	Medium	X						
50	The system provides an end-user search feature for standardized reports.	Medium	X						
51	The system provides ability to broadcast messages to notify users of certain events.	Medium	X						Messages can be broadcast on Synergy's main user login screen.
52	The system has the ability to log communication between teachers and parents (i.e. Parent contact log, Daily Behavior log, etc.) electronically.	Medium	X						
53	The system must provide field level validations as the users are entering data into fields on a given page.	High	X						
54	The system tracks window usage by user.	Low	X						
55	The system tracks report usage by user.	Medium	X						
56	The system provides audit trail of all adds, changes, and deletes at the record level by date, time, and user.	High	X						
57	System provides audit trail of all adds, changes, and deletes at the field level by date, time, and user.	Medium	X						
58	The system allows the District to easily access audit information programmatically.	High	X						
59	The system provides the ability to access all code lists via drop-down (pick list) boxes. The user experience allows for selection of the code by typing in part of or all of the code value, or the code can be selected by scrolling or using arrow keys.	High	X						
60	The system allows all pick lists can be accessed by typing in letters of the pick list items to determine position on the pick list.	High	X						
61	The system allows accessing pick lists by typing in letters is case-insensitive.	High	X						
62	The system allows district-defined codes to have active and inactive status and the date that code became active.	High	X						
63	The system allows for district definition of the order of codes to be displayed within a drop down list box.	High	X						
64	The system allows the removal of district-defined codes that are not in use.	High	X						
65	The system shall retain historical school names and dates they were in effect.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	General Functional Requirements	Priority	Y	C	M	F	3	N	
66	The system's transaction entry screens should clearly indicate required fields.	High	X						
67	The system provides district and school equivalency fields for all codes.	High	X						
68	The system provides state equivalency fields for all codes.	High	X						
69	The system provides federal equivalency fields for all codes.	High	X						
70	The system supports database encryption.	High	X						
71	The system supports auto Logoff/Idle Timeout capability based upon district defined duration.	High	X						
72	The system notifies the user of pending auto-logoff/idle timeout at a district defined time span (i.e. 2 min prior to auto-logoff/idle timeout, a message will warn the user, if the user click a confirmation button, the idle timer is reset)	High	X						
73	The system supports the ability for the system administrator or similar to see who is currently online with username/IP/session length and which application server they are connected to	High	X						
74	The system allows one user to have a single logon to access multiple buildings.	High	X						
75	The system supports role and function-based security.	High	X						
76	The system supports granular security rights down to the field level including read, modify and delete.	Medium	X						
77	The vendor performs an independent security audit, by a 3rd party, at least annually.	Medium						X	
78	The system provides an easy way to lock all users out of the system when necessary, e.g. during upgrade installations.	High	X						
79	Conforms to security and confidentiality of student records as required by FERPA & HIPAA.	High	X						
80	The system provides the ability to copy one user's security to another user and provide for security templates.	High	X						
81	The system has the ability to give one user access to multiple or all schools.	High	X						
82	The system provides full multi-level security including database level security.	High	X						
83	The system provides full multi-level security including module level security.	High	X						
84	The system provides full multi-level security including functional level security.	High	X						
85	The system provides full multi-level security including screen level security.	High	X						
86	The system provides full multi-level security including field-level security.	High	X						
87	The system provides full multi-level security including report access security.	High	X						
88	The system controls the types of data a user can export (i.e. users can only export or report on certain fields based on their access level).	High	X						
89	The system provides pre-defined security reports listing authorized users (logins) and their security profile and only an authorized user can generate this report.	High	X						
90	The district must have the ability to restrict access to confidential fields to only those users with the proper security by role-based and/or individual user (for example: social security number for students and teachers, student economic status, etc.)	High	X						
91	The system supports a single login for staff, including teachers, administrators, parents, and students allowing them to access their data.	High	X						
92	The system supports field-based security.	High	X						
93	The application must be in compliance with the Schools Interoperability Framework (i.e. SIF 2.X certified) and support interoperability with MS SharePoint and Learning Management Systems like Blackboard and Moodle.	High	X						
94	The proposing vendor must be the Prime Contractor, responsible for all applications (including third-party components) and be the point of contact for all implementation, support, and training services.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	General Functional Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
95	The system tracks who and when a record is added to the system and who and when a record is changed within the application.	High	X						Audit trail
96	The system provides for an un-do button, or similar mechanism to cancel a data update.	High	X						
97	The system provides an easy, quick solution for printing the contents of a screen without going through multiple layers of processes.	High	X						
98	The system has an API that duplicates all functions of GUI for programmatic access. If API partially duplications GUI functions, please explain which functions are not available in the API.	High	X						API is available with the OPTIONAL Synergy Technology Toolkit (ST) module.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides a way for all student information to be viewed from one section in the application. For example, to view discipline records, it should be within a short step from viewing a student's class attendance.	High	X						
2	The system provides a way to quickly view, from one central area: student basic information.	High	X						
3	The system provides a way to quickly view, from one central area: address/relationship information.	High	X						
4	The system provides a way to quickly view, from one central area: medical.	High	X						
5	The system provides a way to quickly view, from one central area: daily and class attendance.	High	X						
6	The system provides a way to quickly view, from one central area: course selections.	High	X						
7	The system provides a way to quickly view, from one central area: complete schedule.	High	X						
8	The system provides a way to quickly view, from one central area: grade summary and grade detail for each course.	High	X						
9	The system provides a way to quickly view, from one central area: discipline records.	High	X						
10	The system provides a way to quickly view, from one central area: testing information.	High	X						
11	The system provides a way to quickly view, from one central area: transcript information.	High	X						
12	The system provides a way to quickly view, from one central area: Special Education.	High	X						
13	The system provides a way to quickly view, from one central area: Medicaid.	High	X						
14	The system provides a way to quickly view, from one central area: busing and transportation information.	High	X						
15	The system provides a way to quickly view, from one central area: school activities.	High	X						
16	The system provides a way to quickly view, from one central area: student pictures.	High	X						
17	The system provides a way to quickly view, from one central area: custody/guardianship.	High	X						
18	The system provides a way to quickly view, from one central area: Enrollment in special programs, e.g., English Language Learners.	High	X						
19	The system provides a way to quickly view, from one central area: Housing Subdivision-subdivision student lives in, e.g., View Ridge Apartments.	High	X						
20	The system must contain a student summary screen that incorporates key data elements from all other student screens including but not limited to: student name and address, residence address, subdivision, grade level, homeroom, counselor, special ed code, busing data, enrollment dates, current attendance letter code, current attendance status, class attendance status, and class the student is in at the moment the screen is displayed. The system must allow end users to be able to update data on this screen.	Medium	X						
21	The system provides a way for students' information to be retrieved by last name, first name, student ID, state ID, or any portion of these items, whether separately or in combination. (e.g. the last two numbers of the ID entered are 32 and the first name starts with "Je". All matching records should come up.)	High	X						
22	The system must provide a way to be able to find a student or group of students with any combination of criteria in the database, including but not limited to the following example: name, counselor, grade, class, period, homeroom, program, locker, active status, selected user fields, school (all schools if cross enrolled), student ID, and state ID.	High	X						
23	The system tracks Student ID.	High	X						
24	The system tracks State ID.	High	X						
25	The system tracks Student name.	High	X						
26	The system tracks student preferred first and preferred last name in separate fields.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
27	The system tracks student legal first name, legal last name, and legal suffix, and these are separate fields from the preferred names.	High	X						
28	The system stores student gender.	High	X						
29	The system tracks student ethnicity per the State of Washington requirements (multiple occurrences).		X						
30	The system tracks student race per the State of Washington requirements (multiple occurrences).		X						
31	The system automatically tracks a Federal Ethnicity/Race field that corresponds to the students Race and Ethnicity fields.		X						
32	The system calculates and displays the student's age as of the current date, August 31st, and any other specified date.	High	X						
33	The system tracks a mailing address, a physical address and an alternate address for the student.	High	X						
34	The system tracks multiple phones, including student cell phone. For each phone number the user can designate the type of phone and the order in which the phone number should be called.	High	X						
35	The system tracks Student email.	High	X						
36	The system tracks Distance to school.	High	X						
37	The system tracks Grade level .	High	X						
38	The system tracks Counselor's name.	High	X						
39	The system tracks the students enrollment status.	High	X						
40	The system tracks the date the student meet graduation requirements.	High	X						
41	The system tracks the date the student was issued a diploma.	High	X						
42	The system tracks graduation requirements year.	High	X						
43	The system tracks expected graduation year.	High	X						
44	The system tracks Special Education Disability Code.	High	X						
45	The system tracks Rank flag.	High	X						
46	The system tracks Bus stop and time - AM and PM.	High	X						
47	The system tracks Emergency transportation.	High	X						
48	The system tracks Previous school.	High	X						
49	The system tracks Next school.	High	X						
50	The system tracks current homeroom.	High	X						
51	The system tracks current sports eligibility.	High	X						
52	The system tracks the students birth place including city, state, and country.	High	X						
53	The system tracks the language spoken at the student's home (Home Language).	High	X						
54	The system tracks the student's first language they learned to speak (Primary Language).	High	X						
55	The system tracks the language the student speaks (Language).	High	X						
56	The system tracks the preferred correspondence language.	High	X						
57	The system tracks the number of months the student born outside the United States, has attended a public school within the United States prior to enrolling within the District.	High	X						Through the use of user-defined fields.
58	The system tracks the number of months the student born outside the United States received formal education outside of the United States in the students native language prior to enrolling within the District.	High	X						Through the use of user-defined fields.
59	The system tracks the date the student born outside of the United States, first enrolled in public education anywhere within the United States.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Registration Requirements	Priority	Y	C	M	F	3	N	
60	The system tracks Siblings.	High	X						
61	The system tracks user defined fields.	High	X						
62	The system tracks legal district of residence.	High	X						
63	The system tracks child of a military family.	Medium	X						
64	The system tracks the school the students should be enrolled in based upon the physical address.	High	X						
65	The system tracks a minimum of 10 addresses and relationships for each student.	High	X						
66	The system provides the ability to prioritize contacts and define access based on relationship, including where the student lives and who that student legally lives with.	High	X						
67	The system provides the ability to prioritize contacts and define access based on relationship, including who is the legal guardian and preferred first and last names.	High	X						
68	The system provides the ability to prioritize contacts and define access based on relationship, including after school care and pick-up.	High	X						
69	The system provides the ability to prioritize contacts and define access based on relationship, including mother and father relationship if separated or divorced.	High	X						
70	The system provides the ability to prioritize contacts and define access based on relationship, including closest neighbor.	High	X						
71	The system provides the ability to prioritize contacts and define access based on relationship, including closest relative after the legal guardians	High	X						
72	The system provides the ability to prioritize contacts and define access based on relationship, including release flag.	High	X						
73	The system provides the ability to prioritize contacts and define access based on relationship, including home language code.	High	X						
74	For each address, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. a system so mailings are sent to the appropriate individuals	High	X						
75	For each relationship, the system tracks: a. Address b. City c. State d. telephone numbers e. email addresses f. emergency phone number and its location g. the type of relationship according to district definition h. a system so mailings are sent to the appropriate individuals	High	X						
76	The system tracks who the student lives with both the individual contact level and using a drop down list box of values as defined by the district.		X						
77	The system stores a home language code using District defined codes. A separate preferred language of communication for the student and each guardian/contact shall be used by other areas of the system to produce communication and print report cards.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
78	The system stores and displays the student's active status with the option to view withdrawn students and withdraw history.	High	X						
79	The system provides multiple entries of entry and exit dates, grade level, district name, building name, street address, city, state, and zip "transferred from" field to allow the user to enter the previous school information.	High	X						
80	The system allows the display and maintenance of data for next year, including student's building, grade, counselor, homeroom, team, etc.	High	X						
81	The system validates the student address and assign a school based on the student's grade level and address. The district must be able to define the school attendance zones with the possibility of splitting streets by odd or even lot numbers and splitting streets between cities.	High	X						
82	The system provides tracking of homeless students with a dropdown for the homeless residence. The drop down needs to be maintained by the district with only specific users having secured access to this information. This process needs to include start and end dates to identify when the student was homeless.	High	X						
83	The system allows multiple types of graduation plans to be defined.	High	X						
84	The system tracks students' free/ reduced/paid lunch status along with date approval and transfer on entry/withdrawal to new school for each student.	High	X						
85	The system calculates and display school free/reduced lunch totals by school.	High	X						
86	The system tracks if Free/reduced waiver has been signed.	High	X						
87	The system tracks ELL contact minutes.	Low	X						
88	The system tracks ELL monitoring and exit reasons.	High	X						
89	The system tracks ELL eligible students not receiving services.	High	X						
90	The system tracks ELL accommodations.	Low	X						
91	The system has the ability to enter and track testing data that are specific to ELL within the system.	High	X						
92	The system has the ability, when ELL student rolls over to the middle school/high school or any time an ELL student transfers schools, the next school should be notified of the ELL status of this student.	High	X						
93	The system tracks parent contact with documentation of phone calls / e-mails / visits (i.e. contact log).	High	X						
94	The system tracks students tested but did not qualify for ELL.	High	X						
95	The system has the ability to flag empty required fields.	High	X						
96	The system has the ability to scan Home Language Survey.	Medium	X						
97	The system supports students served that are enrolled in other districts.	High	X						
98	The system provides Mass Update utilities for the Student Demographics, Entry/Withdrawal, and district-defined Demographic data tables allowing updating, adding, or deleting of information in the field specified in selected groups of records.	High	X						
99	The system provides administrative staff, nurse, teachers, and parents the ability to view the same student information screens based on security privileges.	High	X						
100	The system provides an on-line staff directory. Teachers are entered only once but may be assigned to multiple buildings.	High	X						
101	The system maintains instructional staff information such as employee ID, state id, name, birthdate, initials and short name, buildings, team, department, homeroom, certificate number, staff role, and email address. The social security number is viewed and updated only by users with proper security.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
102	The system maintains instructional staff information including emergency contact information and vehicle information.		X						
103	The system provides a room directory which is used to validate homerooms and course locations.	High	X						
104	The system provides a room catalog that includes the room's Building, Number, Name, and Maximum Seats. The room catalog shall be able to be modified	High	X						
105	The system allows mailing labels to be created for any group of students that meet selection criteria. Mailing label options will include allowing parents to receive one label when they have more than one child in the group. Mailing label options will include allowing option to generate as many labels as required.	Medium	X						
106	The system supports maintenance of codes and data entry choices to be set up and controlled at the district level to enforce standardization which can also be mapped to state codes.	High	X						
107	The system allows the district to define the online enrollment entry pages and required fields for entering a new student. This should support multiple languages as appropriate.	Medium	X						
108	The system provides for the maintenance and storage of student history (for example, but not limited to, student name, address, phone number, enrollment history, grades and transcript, attendance record, classes attended, grade level completed and year completed) across all school years and without time limitation.	High	X						
109	The system provides view/print access to enrollment history for withdrawn students.	High	X						
110	The system maintains one student district record for each student while tracking information from multiple schools and programs over multiple years.	High	X						
111	The system supports federal requirement for multiple race categories per student.	High	X						
112	The system supports federal requirement for multiple ethnic categories per student.	High	X						
113	The system allows custom programming options when canned package fails to meet the district's needs.	High	X						
114	The system allows free/reduced/paid lunch information to be automatically imported/uploaded/posted from cafeteria management package (nutrition system) at regularly scheduled intervals (e.g., hourly, daily, etc.) with no human interaction.	High	X						
115	The system provides a search function allowing a selection of students based on a combination of fields in demographic and other areas. The student list and query should be saved in an excel file which can be easily saved onto a client desktop. Users should be able to save queries for future use. The system provides the ability to allow user generated reports to be saved as CSV, PDF files and webpages.	Medium	X						
116	The system provides the ability to search on the student's name using tools such as wildcards and Soundex. The system should default to only include active students whenever a student search is initiated, and also optionally allow the inclusion of inactive students.	High	X						
117	The system provides an alert message that will display when a user brings up a student's record, e.g., "Do not release this student to anyone except the primary guardian."	High	X						
118	The system provides alerts which can be viewed across system screens. The system allows free form text field within alerts and smart alerts that pop up on the main, attendance, and nurse pages, e.g. IEP, life-threatening, family, cross-enrolled. And the granularity of the type of alert is controlled at the district level.	High	X						
119	The system flags medical, legal, and disability alerts system-wide. These alert codes shall be table validated, dated, and defined by the district.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Registration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
120	The system has "smart" alerts with different designators (colors) for the type of alert. These alerts shall be displayed on all teacher screens. Highlighting the student name in the gradebook is one possibility.	High	X						
121	The system provides a way to indicate that a student is to be excluded from state reporting.	High	X						
122	The system provides for tracking of students who attend a school outside the district including name of the school, state id of the school.	Low	X						
123	The system provides a way to track students attending a private school, but receiving services in the district. The tracking shall include the number of minutes per day.	High	X						
124	Allows district to specify alpha or numeric student ID's up to ten digits.	High	X						We allow alpha characters in student ID's in manual mode.
125	The system generates automatic sequential assignment of student ID's while allowing users with appropriate security to override. The student ID must always be unique.	High	X						
126	The system provides a utility for the authorized user to change a student ID to a new user-specified number throughout the database.	High	X						
127	The system automatically links enrollment and withdrawal status to Average Daily Attendance (ADA) eligibility and all attendance and membership calculations.	Medium	X						
128	The system has the ability to conduct an automated transcript audit that enables a view of missing criteria/credit and creates an alert for graduating seniors.	High	X						
129	The system has the ability to work with student data while student is in a transition period. i.e. in district transfer students/students matriculating to another building.	High	X						
130	The system has the ability to report students enrolled in the wrong building with no approved transfer to the enrolled school.	High	X						Via enrollment restriction.
131	The system provides the ability to assign a school of attendance separate from the residence school and requires a valid reason code for this assignment.	High	X						
132	In order to assign residence schools to students, the system has the ability to maintain plan areas and attendance zones which can be used to tie addresses to schools at the appropriate grade level.	High	X						
133	The system allows for mass update of next year enrollment and end of year withdrawal based on subdivision and school boundary or projected school with the capability to override individual students.	High	X						
134	The system has the ability to pre-enroll students.	High	X						
135	The system provides the ability to have multiple mailings per student based on guardian addresses for automatically printing multiple copies of address labels, schedules, interim progress reports, report cards, attendance, medical, and discipline letters, etc..	High	X						
136	The system supports extensive communications fields for students and guardians/contacts including fields for multiple phones, employer's name and phone, multiple email addresses, daycare name and phone, etc.	High	X						
137	The system allows the district to have the option as to whether to allow guardian/contact address/phone/email changes for students enrolled in a different school. If it is allowed, the system automatically notifies the office personnel at the other school.	High	X						
138	The system creates Entry/Withdrawal records whenever students enter into or withdraw from a district, building, grade, or calendar type. The user must enter a valid district-defined withdrawal reason code.	High	X						
139	The system displays Entry/Withdrawal records in chronological order with the most recent entry date at the top and the oldest entry date at the bottom.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
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140	The system displays all of a student's entry/withdrawal records on one page for the entire time that the student has been enrolled in the district.	High	X						
141	The system has the ability to require withdrawal from one school before enrollment in another school.	High	X						
142	The system has the ability to allow enrollments in multiple schools for current and next year while maintaining a home school for both current and next year..	High	X						
143	The system provides the capability to track student's mobility within the district.	High	X						
144	The system shall retain student information for a district-defined number of years for both active and withdrawn students, across all school years and campuses.	High	X						
145	The system allows the District to set up programs and run reports where a student's entry and exit date for the program and associated fields can be tracked. The types of programs include but not limited to Gifted & Talented, Homeless, Bilingual, 504, Special Education, Title 1, Migrant Immigrant, etc.	High	X						
	The system provides the ability to create and manage unique 504 plans that are not associated with	High	X						
146	The system allows processing of school-to-school transfers.	High	X						
147	The system allows unique district-defined fields for each special program.	High	X						
148	The system provides a field to track if a student is a Foster Child.	High	X						
149	The system tracks immigrant date and type, and whether the student is identified as an immigrant under NCLB.	High	X						
150	The system tracks Title 1 instruction being administered, title 1 support services being offered.	High	X						
151	The system provides a field to store the number of years of education in the US, district, and school.	High	X						
152	The system tracks dates of entry and exit and associated fields and keeps a history as needed for state reporting.	High	X						
153	The system provides an end-of-school year process to mass update all students to their next year building, grade, homeroom, teachers, team, etc.	High	X						
154	The system has the flexibility for homeroom assignments to be either entered by individual students or mass assigned including being assigned by scheduling period or by user-defined criteria.	High	X						
155	The system allows for pre-registration of students within the district for the next school year without affecting ADA and Membership calculations and without including them in the reporting of current students.	High	X						
156	The system tracks students for their association with another district. The district numbers are validated using a district-defined list.	High	X						
157	The system provides a student's withdrawal code to automatically flag a student as inactive throughout the database and automatically exclude the withdrawn student from reports, letters, and mailing labels, queries in all modules, unless otherwise indicated.	High	X						
158	The system provides a duplicate student check to be performed early in the enrollment process rather than at the end.	High	X						
159	The system provides a process for merging and removing duplicate students.	High	X						
160	The system allows the removal of a student record from the database by authorized users.	High	X						
161	The system provides the ability to track at-risk population and corresponding information for all criteria listed by the state and defined by the district.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
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162	The system tracks transportation information for each student and for each staff member (volunteer or employee) including route number, stop number, driver's license number, license plate, registration, and insurance information.	Medium	X						Basic information such as bus number, route number, intersection, comments, time of pick up/return, distance in miles, transportation codes, contact person/phone number, and transportation needs are currently available through the student screen and transportation screen.
	The system tracks volunteers that assist the school district including what they do, how they are connected to the school (which particular student), and whether or not the volunteer has signed in, has submitted the volunteer form, has turned in vehicle insurance form, etc.		X						
163	The system allows Family Contact information to be copied to new siblings and a way to find potential family members during enrollment. The system has checks and reminders to make sure that this is not done carelessly and only allow parents/guardians in the system once.	High	X						
164	The system supports searches using user-defined criteria across years and schools.	High	X						
165	The system supports ability to search by family.	High	X						
166	The system stores membership information, book assignment, locker assignment, parking eligibility and decal number.	High	X						Via user defined fields.
167	The system provides the ability to assign lockers based on criteria such as grade-level or homeroom assignment. (i.e., assign a range of locker numbers to a grade-level including controls by odd & even numbers).	High	X						
168	The system supports tracking locker numbers, lock and serial numbers, and ability to report and export data as .csv files.	High	X						
	The system allows the classroom teacher and homeroom teacher to view locker information for their students.		X						
169	The system tracks information (type of services to be received) for students with 504-plan, start and end dates, and district accommodations.	High	X						
170	The system produces report showing program membership by dates, by campus, by program, etc.	High	X						
171	The system has the ability to automatically to identify, report and optionally mass-update student's needing an At Risk Indicator based on information in the database. The information used would include but not be limited to LEP, discipline, grades, state test scores, and district test scores.	Medium	X						
172	The system allows scanned documents to be stored and organized with association to a student.	High	X						
173	The system supports multiple households per family.	High	X						
174	The system provides notification if a student address and/or phone number already exist in the database.	High	X						
175	The system provides a parent/guardian/contact relationship code and title for each.	High	X						
176	The system tracks similar addresses for group mailings, (i.e. two students in the same household) to mail to only the unique address.	High	X						
177	The system allows addresses to be validated against a list of valid addresses maintained at the district level.	High	X						
178	The system allows separate physical and mailing addresses for students and contacts.	High	X						
179	The system provides an effective date for the address.	High	X						
180	The system has the ability to view student picture.	High	X						

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181	The system has the ability to store and view parent/guardian picture within the system.	Medium	X						Parent / Guardian pictures can be attached/stored in Student Documents.
182	The system automatically re-size student pictures to fit the screen independent of the original photo size.	Medium	X						Photos can be resized to some extent, but there are parameters for photos.
183	The system supports automatically importing photos in mass and individually.	High	X						
184	The system provides emergency contact information includes physician, preferred hospital, and insurance information for each student.	High	X						
185	The system provides a drop-down list of valid hospital names is provided so the hospital doesn't need to be re-typed each time it is entered. This can be overridden as needed.	Low	X						The hospital field is a free form txt field. The field this refers to may have been user defined field which can relate to a drop down.
186	The system stores the student's counselor name and id number.	High	X						
187	The system allows district-wide family management with ability to link siblings and household members across the district.	High	X						
188	The system provides a complete family profile on one screen.	Medium	X						
189	The system maintains family contact information with associations to each student under their responsibility in order to support district-wide Family Management and to track siblings and household members across the district.	High	X						
190	The system automatically searches district database for potential student matches and duplicate students as the registration information is being entered. (Date of Birth match should be an option, but not a requirement for match).	High	X						
191	The system tracks every student's withdrawal, inactivation and reactivation to and from the district. The system must keep a continuous log of the transactions that can be viewed for each student in the student's main record. When these transactions occur, the data must be available without needing to re-enter demographic data as defined earlier.	High	X						
192	The system allows for student transfers and allow the demographic information to follow that student to the new school. All these transactions must be recorded and available to be viewed in the student's record.	High	X						
193	The system must account for students on home instruction.	High	X						
194	For any transaction that occurs to a student's grade, homeroom, CTE-tech, special education, resident, and/or calendar, demographic information, the system shall accurately record this data and have the data available to be viewed for each student.	High	X						
195	The system reports on transfer student by status, ethnicity, grade and location.	High	X						
196	The system tracks student withdrawal information (e.g. withdrawal reasons, withdrawal dates, comments etc.).	High	X						
197	The system has the ability to report any students enrolled in the wrong school (incorrect home school with no approved transfer to the enrolled school).	High	X						Address Validation, Enrollment Restriction, Query and/or SIREN will find these scenarios.
198	The system allows district defined enrollment and withdrawal codes and associates them to state specific codes.	High	X						
199	The system allows pre-registration of new students for next year (i.e. incoming Kindergarten students) without counting them in the active students for the current school year.	High	X						
200	The system allows data changes to be entered with an effective date other than today.	High	X						
201	The system allows for mass update of next year enrollment and end of year withdrawal based on grade-level, geocode/neighborhood school and approved transfers.	High	X						

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202	The system allows withdrawal date to be recorded as the first day of non-attendance. Also, special program withdrawal dates can be recorded as the first day of non-service.	High	X						
203	The system tracks students who are dual attended (on multiple campuses).	High	X						
204	The system allows the District to specify method of first day enrollment, indicating those present or flagging "no shows".	High	X						
205	The system provides quick links to auto-generated lists of recently enrolled or withdrawn students.	High	X						Add drop reports are available with the application.
206	The system tracks student's school assignment, grade, reason for entry, assignment date, homeroom etc.	High	X						
207	The system maintains status codes for students (i.e. pre-registered, active, inactive, deleted, etc.)	High	X						
208	The system supports automatic grade promotion process (e.g. from 4th grade to 5th grade) unless specifically marked in the system to hold student back.	High	X						
209	The system tracks and modifies school boundaries using computerized mapping tools (geo-coding).	Low	X						
210	The system does not allow assigned ID numbers to be re-assigned.	High	X						
211	The system has the ability to produce withdrawal form with all student information (i.e. Grades, attendance, resource requirements, discipline, etc.).	High	X						
212	When enrolling a new student, the system shall automatically check student information to ensure the student is not already enrolled (name, address, birthdate, etc.).	High	X						
213	The system has the ability to report current student enrollment by any size neighborhood (x,y coordinate range).	Low	X						
214	The system has the ability to report neighborhood demographic trends over multiple years for historical trends by neighborhood.	Low	X						
215	The system has the ability to report transfers over multiple years (trends).	Medium	X						
216	The system has the ability to run reports by entry code, including reports on out of district transfers by student information.	Medium	X						
217	The system has the ability to group addresses by pre-defined categories (i.e. Subdivisions or neighborhoods).	High	X						
218	The system calculates transfer capacity by school and by program (e.g. special Ed, ELL, bilingual classes) based on intended class sizes, projected enrollment etc.	High						X	
219	The system has the ability to modify and/or approve transfer capacity by school and by programs (i.e. special Ed programs).	Medium						X	
220	The system must support summer school as part of the previous or current school year without the need to create a separate instance of the database or a separate school, and without disrupting the regular campus assignment or schedule.	High	X						
221	The system has the ability to produce registration/enrollment package (e.g. demographic information, class schedule).	High	X						
222	The system has the flexibility for homeroom assignments to be mass assigned either alphabetically by grade, by a selected period of the day or manually for individual students. When done by an individual student, the posting routine must allow students to be posted into a specific homeroom or be assigned to different homerooms at the time of posting.	High	X						
223	The system has the ability for a mass assignment routine for mass adding students to counselors alphabetically by grade is required.	High	X						

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224	The system provides a locker table that ties a specific locker number or a lock to a series of one to five combinations. For the tumble locks, there should be a routine that assigns the new combination to the student. There should also be a free form area that can provide a description of where the locker is located.	High	X						
225	The system provides a counselor table.	High	X						
226	For posting data to user fields, the system provides a mass updating routines for all students or selected students by student, by grade, by homeroom and by counselor. Updating and posting must be available for one or more specific user fields.	High	X						
227	The system has the ability to input more than one email address and one phone number per contact (particularly parents).	High	X						
228	The system has the ability to attach photos (of people not allowed to pick up a student, or of only people allowed to pick up student, etc.),	High	X						Can attach any number of documents to the student record.
229	The system provides board and district level reporting, fee reporting, incident reports, enrollments by grades, etc.	High	X						
230	The system allows administrators, teachers and counselors to directly contact parents by a click on the email address.	High	X						
231	The system has the ability to accept online registrations. Parents can view forms, enter information, electronically sign and submit registration packet via the internet.	Medium	X						
232	The system is compliant with Washington State reporting requirements.	High	X						
233	The system supports tracking students by athletic and non-athletic teams and groups.	High	X						
234	The system supports assigning a student to a team or group and another school, and allows that other school to view that student's data as necessary.	High	X						
235	The system supports the ability to click and email address and automatically interface with the users email client software to create an email addressed to the selected email address.	High	X						
236	The system provides the option to print/display a list of those students who should receive multiple mailings (the student has more than one household who want/need to be contacted).	High	X						
237	The system provides the ability to enroll the student in one or more schools during an overlapping time period as necessary for the student to take courses at more than one school as well as participate in athletic teams and non-athletic clubs. Included with this functionality is the ability to enter letter grades as well review student information as appropriate.	High	X						
238	The system provides an overload report that produces a list of teachers and/or classes that are classified by the district as an overload class. The criteria for determining such a class should be based upon a combination of the number of students allowed for the class, the type of class, and the type of teacher.	High	X						
239	The system provides a mechanism for tracking narrative text about the student. The notes should be secure, should all display or be accessed from a single screen, should be easy to modify, as well as not be restricted in size or number.	High	X						
240	The system provides the ability to track waivers - students attending schools outside of their resident designated school. This tracking process includes identification of the students designated school, their actual school, why they are attending this school, the date they applied or the waiver, the date the waiver was provided or denied. and if denied, for what reason. Each approved waiver then can be expired based upon a length of time and for a particular reason.	High	X						
241	The system provides the ability to identify a primary email address that can be used as a contact address for the student and/or their parents.	High	X						

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242	The system provides the ability to track teams and groups of students, defined by either the district, the school or the teacher.	High	X						
243	The system provides the ability to track a variety of school-based special forms, such as Student Contracts, PE Locker Checkouts, and other student agreement-type documents.	High	X						

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#	Attendance Requirements	Priority	Y	C	M	F	3	N	
1	The system utilizes an attendance code table that relates an attendance code to a description, its associated number of days absent, tardy, days possible and a state code for the absence.	High	X						The district decides what codes area available for use at the sites and when.
2	The system provides a school-based daily attendance code table that can be copied into another school for their use.	High	X						Attendance codes are determined by the district and can be made mandatory, or schools can opt in to which codes they want to use.
3	The system provides a calendar for the entire year that can be created by entering the start date and end date.	High	X						
4	The system allows each school to be able to create multiple types of calendars. For example, a school calendar, a parent-activity calendar, a student activity calendar, etc.	Medium	X						
5	The system allows each school calendars to account for holidays, snow days, in-service days, staff development days, marking period end dates, test days and half days.	High	X						
6	The system provides an on-screen view of the school calendar must be available.	High	X						
7	The system can accommodate year round school.	High	X						
8	The system provides for posting daily attendance for individual students with the flexibility to be done by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so on any part of either of the above areas.	High	X						
9	The system provides for the posting of daily attendance by homeroom with the options to be done by the individual day or by a range of dates.	Medium	X						
10	The system provides the ability to take attendance for students that are taking classes in other buildings.	High	X						
11	The system provides for the display of the attendance code description when entering the attendance code.	High	X						
12	The system provides for tardies; the system must have the flexibility to post by student ID, last name and first name. To pull up a list of matching students, the user must be able to do so by any part of either of the above areas.	High	X						
13	The system provides for tardy entries that track the date and time of the tardy, the reason, optional free form narrative, and the associated daily attendance code.	High	X						
14	The system provides a reason for the tardy that ties the tardy code to the daily attendance table must be included to accelerate the data entry process. All codes that relate to this process must be available to be displayed for easy access to valid codes.	High	X						
15	The system displays a student's daily attendance in a variety of ways. Some ways required are to see the entire calendar with the attendance codes along with a key to the code's meaning. In addition, you must be able to view this information by date order, day of the week order, and by attendance code. All views must be able to appear on the screen and moving from one view to the other should not be a time consuming task.	High	X						
16	The system includes reports from the attendance code table and individual school calendars.	High	X						
17	The system provides a daily attendance list that has the flexibility to be produced for a specific date and for a specific attendance code. In addition, the school must have the option for the above list to include the phone number of where the student resides and an emergency number.	High	X						
18	The system displays student alerts on attendance screen.	High	X						
19	The system includes on every daily attendance report that includes a narrative that will be displayed on the bottom of the list. This daily announcement must be user defined.	Medium	X						

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#	Attendance Requirements	Priority	Y	C	M	F	3	N	
20	The system provides an excessive absence list which includes the ability to specify a range of dates to consider and report on the number of absences and tardies within that range.	High	X						
21	The system provides an attendance statistical report for any specific year and month that shows the attendance code and total number in that code by gender and other criteria.	High	X						
22	The system provides enrollment summary reports that calculate tardies and absentees by grade, Federal ethnicity, and gender. The report must also calculate the average daily attendance, average daily enrollment and average daily membership. This information must be available for any specific date for a specific student.	High	X						
23	The system provides an attendance report of all the students for a specific day and must include grade, homeroom, reason, and monthly total for the students' absences and tardies.	High	X						
24	The system provides multiple user defined letters to be stored and merged with the address/relationship information to notify family members of excessive absences.	High	X						
25	The system provides user defined class attendance codes and a reason for the absence that is tied to the attendance code for easy input by authorized staff.	High	X						
26	The system provides for attendance taking within the system that is intuitive and easy to use for teachers and administrators.	High	X						
27	The system must allow for the ability for mass entry of absences over multiple days by student or group of students.	High	X						
28	The system provides for posting of data to be performed by date or by class section.	High	X						
29	The system must be able to post students as entering late or leaving early and record the time of entering/leaving. The system must be able to record multiple entries for one class period, e.g., a student leaves for lunch with Mom and returns before the period is over.	High	X						
30	The system provides daily attendance that is updated in real-time from the class room teacher.	High	X						
31	The system provides the capability to pre-post or delete excused absences or field trip information. Posting routines must be available by class section, by individual student, grade or team to cover a single period or range of periods, including non-consecutive field trip days.	High	X						
32	The system provides the ability to view the total class absence for the student's entire school year and then pick certain courses to view date range absence totals and the specific days absence for each course.	High	X						
33	The system must contain tables that define multiple sets of the starting and ending times of each period. System must be flexible and support multiple bell schedules and early releases.	High	X						
34	The system is designed to calculate student days absent based upon district definition of how to calculate days absence from class absences.	High	X						
35	The system provides a report student attendance history, including days absent.	High	X						
36	The system provides a report of selected student attendance history based upon attendance criteria.		X						
37	The system provides a report of student summary attendance data.	High	X						
38	The system provides a report of daily class absence list.	High	X						
39	The system provides a report of excessive absence list for a range of dated class absences to include one or more categories related to excused, unexcused, and school authorized.	High	X						
40	The system provides a report of ability to flag user defined thresholds of unexcused absences per month and per semester.	High	X						

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41	The system provides a report of excessive absence letter for a date range of absences to include one or more categories related to excused, unexcused and/or school authorized, e.g., support reporting of more than 7 class period absences.	High	X						
42	The system provides the ability to create an attendance calendar that reflects the classes being taught for a specific day.	High	X						
43	System must provide for the configuration of absence alerts. These should "pop up" or appear distinctly for each student when user defined absence criteria are met.	High	X						
44	The system provides absent dates to be entered for valid dates as designated on the school's calendar. Also, the student must be enrolled on the date specified.	High	X						
45	The system allows a student who is taking classes in more than one school, he or she will appear on the attendance list for the appropriate school for each of his/her classes.	High	X						
46	The system provides the ability for when a student transfers schools or courses, attendance information is still available for the school and the course the student transferred out of.	High	X						
47	The system provides absence records that can only be entered or updated and viewed by users who have been given the proper security.	High	X						
48	The system allows attendance history to only be entered or updated by users who have been given the proper security.	High	X						
49	The system allows authorized user to configure number and types of absences which will trigger parent notification.	High	X						
50	The display of the school's calendar shows an indicator for each type of nonattendance day (such as holidays, in-service days, staff development days, district-defined day types).	High	X						
51	Absence notifications may be sent to guardians by letter or email and will support multiple languages.	Medium	X						
52	Automatically notify appropriate recipients when a student reaches a district-specified number of absences; excluding students who are exempt.	High	X						
53	After absence corrections have been made to a prior reporting period, the user may run a revised attendance report for the prior period.	High	X						
54	The system must provide a Teacher Attendance Verification report by period. The report must include all days for the grading period being run. The report must include totals for the class and grand totals for the report.	High	X						
55	The system must be able to report teachers' compliance on taking attendance and will provide a notification to the teacher when attendance has not been completed within a specified amount of time.	High	X						
56	The vendor must be capable of modifying the system to accommodate any changes or new requirements from the district.	High	X						
57	The system allows the user to query and run a report to get a list of student absences.	High	X						
58	The system provides for attendance for withdrawn students to be readily and easily available.	High	X						
59	The user must be able to run a Perfect Attendance Report (as defined by the district).	High	X						
60	The system provides an audit trail management.	High	X						
61	The system must support taking attendance on an alternate bell schedule for a given date. For example, semester exams may be given on a day where only period's 4 - 8 meet.	High	X						
62	The system must ensure that absences cannot exist for a student on days that the student is not enrolled in a class. The system must automatically find and delete the invalid absences.	High	X						
63	Student absences may be easily maintained on a class or daily basis. The absences are easy to display and report on.	High	X						

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64	The system must be able to take attendance on non-regular class related activities, e.g., testing days.	High	X						
65	The system supports full district level reporting, analysis, and data mining.	High	X						
66	The system provides the option to prevent teachers from overwriting absences entered by the office.	High	X						
67	The system allows excessive absence reports to be run based on different criteria.	High	X						
68	The system allows to query students with more than user specified number of unexcused school days or periods.	High	X						
69	The system provides the ability to print letters to parents based on percent absent and /or days absent.	High	X						
70	Attendance letters may include both demographic and attendance information.	High	X						
71	Teachers are allowed to view attendance information only for their students.	High	X						
72	The system provides a daily absence office report with phone numbers that is quick and easy for attendance personnel to use.	High	X						
73	The system provides both summary and detail attendance reports for a range of dates.	High	X						
74	The system provides cumulative attendance information for all students in all buildings that can be easily accessed and reported.	High	X						
75	The system provides attendance data that is linked with demographic, general academic, and entry/withdrawal data for each student.	High	X						
76	The system maintains attendance by building for those students who transfer from one building to another.	High	X						
77	The system provides absences to be maintained by building and period for students attending classes in multiple buildings.	High	X						
78	The system provides the ability for a campus to view student data for students that have been enrolled on that campus but are currently enrolled on another campus. Also provides for the current enrolled campus to view student attendance on the student's prior enrolled campuses.	High	X						This is possible as long as the user has security access to all campuses involved.
79	The system supports different numbers of periods per day and week (i.e. 4 periods/day, 8 periods/day, rotating schedules etc.) The system should allow the authorized user to define start and end times for periods by school calendars.	High	X						
80	The system calculates average daily membership and daily attendance.	High	X						
81	The system provides ability to identify no-show students that were absent on the first day of school.	High	X						
82	The system maintains an adequate number of district-defined absence codes, controlled at the district level, to meet the needs of the district. (Minimum of 60, plus additional for growth)	High	X						
83	The system provides for multiple years of attendance data and can be easily viewed and reported on.	High	X						
84	The system supports daily attendance information to be entered for morning only, afternoon only, or for the full day.	High	X						
85	The system supports attendance to be entered for a student by student ID or student name.	High	X						
86	The system supports attendance to be entered for individual students, predefined groups of students, by period, or by course/section.	High	X						
87	The system supports individual students to be excluded when attendance is entered for a group of students.	High	X						
88	The user may enter a default absence code when entering absences for a group of students. The default absence code may be overridden for individual students.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Attendance Requirements	Priority	Y	C	M	F	3	N	
89	The system provides the option for the district to grant security to designated personnel to allow them to post absences for future dates.	Medium	X						
90	The system supports different types of school calendars (i.e., quarters, trimesters, semesters, full year.)	High	X						
91	The school calendars automatically interface to the attendance module so that students not scheduled to be in school or in a class are so noted.	High	X						
92	The system allows school calendar to be altered during the school year (before or after the fact).	High	X						
93	The system supports attendance that is fully integrated with scheduling changes and class rosters automatically reflect adds and drops.	High	X						
94	The system supports attendance that is compatible to all forms of schedules at the secondary level.	High	X						
95	The system provides attendance information that is fully integrated to enrollment, withdrawal and Average Daily Attendance status.	High	X						
96	The system provides attendance information that is fully integrated to grade reporting.	High	X						
97	The system provides school calendars that are saved for prior years and the system allows for maintaining calendars for current and future year.	High	X						
98	The system allows school calendars to be copied to other buildings.	High	X						
99	The system provides attendance totals that are automatically calculated by the system at any time specified by the district.	High	X						
100	The system allows accumulated absence totals for each student by Days Enrolled.	High	X						
101	The system allows accumulated absence totals for each student by Days in Membership.	High	X						
102	The system allows accumulated absence totals for each student by Days in attendance.	High	X						
103	The system allows accumulated absence totals for each student by Total absences.	High	X						
104	The system allows accumulated absence totals for each student by Excused absences.	High	X						
105	The system allows accumulated absence totals for each student by Unexcused absences.	High	X						
106	The system allows accumulated absence totals for each student by Total tardies.	High	X						
107	The system allows accumulated absence totals for each student by Unexcused tardies.	High	X						
108	The system allows accumulated absence totals for each student by Excused tardies.	High	X						
109	The system allows accumulated absence totals for each student by Number of school authorized absences.	High	X						
110	The system allows accumulated absence totals for each student by Total Days Absent.	High	X						
111	The system allows accumulated absence totals for each student by Total Days Present.	High	X						
112	The system allows accumulated absence totals for each student by Attendance Percent.	High	X						
113	The system allows accumulated absence totals for each student by Average Daily Attendance.	High	X						
114	The system allows accumulated absence totals for each student by Average Daily Membership	High	X						
115	The system allows for separate absence entries by the teacher and by the office staff, so that if an office entry is made, it will override the teacher entry.	High	X						
116	The system fully integrates office and classroom attendance.	High	X						
117	The system provides real-time entry, update and viewing of attendance between the office and the classroom.	High	X						
118	The system includes the capability to display a whole month or year of attendance for a student and then edit attendance on that screen.	High	X						

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119	The system allows the district the option to allow pre-approved or Office absences to be stored.	High	X						
120	The system provides the option, when allowing pre-approved absences, for the teacher to be able to override with notification to the office when the student is actually present.	High	X						
121	The system allows the teacher to enter absences and tardiness from a classroom workstation.	High	X						
122	The teacher is able to enter attendance and note absences and tardiness from a mobile device.	High	X						
123	The system provides for student pictures to be displayed when the teacher is taking attendance, if the teacher prefers that method.	High	X						
124	The system allows the office attendance clerk with proper security to access and modify student attendance history. The history includes the reason codes for the absences	High	X						
125	The system allows the teacher to view, but not update, student attendance history for the entire school year.	High	X						
126	The system provides a Missing Submission report listing classes or homerooms where attendance has not been taken.	High	X						
127	The system sends a clear alert/notification to teachers who have forgotten to enter attendance for the class. System should provide for different types of notifications, not just e-mail.	High	X						
128	The system provides a submission tracking system to enable office to determine which teachers have not completed attendance entry.	High	X						
129	The system optionally allows attendance codes to be restricted from use by teachers.	High	X						
130	System should enable counselors to enter absence reasons within their building e.g. student is with counselor for some reason and is missing class.	Medium	X						
131	The system provides the ability to restrict teachers from changing attendance entered by the office.	High	X						
132	The system allows teachers to be optionally restricted from entering attendance after a deadline for each class period.	Medium	X						
133	The system allows related absence codes to be aggregated into groups for reporting purposes (for example, you can group all illness-related absences with Excused Absences).	High	X						
134	The system optionally provides blank attendance registers for manual collection of attendance data.	High	X						
135	On a block day when classes are multiple periods, the system allows the teachers to enter an absence for the first period that carries to the other periods, but give them the ability to alter the absence for the later periods in the block if a student returns to class.	High	X						
136	The system allows the district an adequate number of attendance exceptions reporting and alert thresholds for total or consecutive absences or tardies by code type and date range to meet the state requirements.	High	X						
137	The system supports and maintains the number of school district-defined attendance letters.	High	X						
138	The system provides the ability to track attendance review committee decisions.	Medium	X						Via user defined fields
139	The system provides a class roster with seating chart and pictures.	High	X						
140	The system supports attendance that is compatible to all forms of schedules at the elementary level.	High	X						
141	The system optionally supports suspension codes from Discipline that automatically update student attendance for a designated date range.	High	X						
142	The system provides a report on absence statistics by student and by school.	High	X						
143	The system provides ability to track court warnings and court dates.	Medium	X						

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#	Attendance Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
144	The system provides the ability to support monitoring of truancy at the district level.	High	X							
145	The system provides the ability to support monitoring of truancy proceedings at the district level.	High	X							
146	The system provides a truancy report based on the district's definition of truancy.	High	Partial						Truancy information is captured and stored, and a report can be generated through the use of Query and SIREN.	
147	The system provides the ability to have a default consequence if an absence remains unexcused for more than a set period of time.	High						X	This functionality could be accomplished with customization, however customization is not being proposed.	
148	The system allows the teacher to be able to change attendance history for a school specified period of time.	High	X							
149	The system has the ability for the classroom teacher to modify the attendance reason code as entered by the attendance office.	High	X							

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#	Scheduling Requirements	Priority	Y	C	M	F	3	N	
1	The system provides district-wide creation and dissemination of course catalog information.	High	X						
2	The system provides for user designation of "look-up" fields (and definition of their corresponding values) in the course catalog record.	High	X						
3	The system provides user defined fields for the tracking of additional information about course catalog records (Higher Education College Board designations, NCAA, etc.).	High	X						
4	The system provides for district-wide maintenance of course catalog information.	High	X						
5	The system provides for school ownership of course catalog elements relating to scheduling and assignment of credit values.	High	X						
6	The course catalog system provides for the association of course catalog records to GPA calculation definitions.	High	X						
7	The system provides for the association of course catalog records to graduation requirement and career planning definitions.	High	X						
8	The system provides for the association of course catalog records to state course codes and titles.	High	X						
9	The system provides for the transfer of student academic history information to higher education institutions through the cross referencing of the course catalog to national standards definitions.	High	X						Synergy has electronic records transfer with mapping capability.
10	The system allows assignment of a district course code.	High	X						
11	The system allows for the entry of a district course title (short text).	High	X						
12	The system allows for the entry of a district course description.	High	X						
13	The system allows assignment of a course classification of instructional programs (CIP) code and description (needed for P210 Voc reporting).	High	X						Career and Technical Education (CTE) program participation is configured, tracked and reporting in Synergy.
14	The system allows assignment of a course United States Department of Education Cluster code and description (needed for Career and Technical Education reporting).	High	X						
15	The system includes a course Articulated Tech Prep Status indicator (yes or blank, for P210 Voc reporting).	High	X						
16	The system allows for grouping of CTE courses by selected CIP codes for purposes of identifying students who are vocational completers.	High	X						
17	The system allows assignment of a district course curriculum code.	High	X						
18	The system allows assignment of a course curriculum subject area code (e.g. music or art within fine arts).	High	X						
19	The system allows assignment of a course type code (e.g., independent study, advanced placement, basic, honors, limited English, regular, special education).	High	X						
20	The system allows for assignment of a course start and end date (active, archival, etc.).	High	X						
21	The system allows for indicating what grade level of students typically take this course.	High	X						
22	The system provides for the designation of whether attendance may be taken for a course.	High	X						Yes, by section.
23	The system provides for the designation of whether academic marks may be assigned for a course.	High	X						
24	The system provides for the designation of whether academic marks will be posted to course history for a course.	High	X						
25	The system provides for the designation of whether a course appears in student transcripts.	High	X						

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26	The system provides for the designation of whether a course is to be included in the students high school list of courses.	High	X						Yes, Synergy has the Course History Type field that 'High School' can be designated in. There are also the Course Subject Areas for Graduation Requirements. The Low and High grade can be set for the high school grade levels. A UD field could be added to the screen if none of these would qualify.
27	The system allows entry of the average minutes per week of instruction for the course.	High	X						Yes, by section / student.
28	The system allows for entry of a course designator which becomes attached to the student transcript.	High	X						
29	The system provides the ability to associate a course with special programs.	High	X						
30	The system provides scheduling routines must be available to address the needs of elementary, middle and high schools.	High	X						
31	The system supports multiple course formats including 6 week, 7 week, 9 week (quarter), 12 week (trimester), 18 week (semester), 36 week (full year), alternating day and block courses that can "explode" into multiple courses. In addition, The system allows for the mixing of any of the above combinations.	High	X						
32	The system has the ability to determine the current semester codes and day of cycle for any given calendar date.	High	X						
33	The system is capable of handling rotating block scheduling as well as traditional scheduling methods.	High	X						
34	The system defines a course with a code and description. Each course must be related to a department. Information must be readily available that shows the course, its credits and if the course is required for graduation.	High	X						
35	The system allows for alternate requests. There is an easy method to view the number of times a certain course was requested as a primary and an alternate.	High	X						
36	The system allows each course and section to be able to meet in multiple periods throughout the day.	High	X						
37	The system allows for each course section to have grade restrictions specified.	High	X						
38	The system allows for course sections to be able to be defined as being offered in a different school/location than the Student's home school.	High	X						
39	On-line requests are different from adding courses. After adding the course requests for a student, the system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	Medium	X						
40	When requesting a course, the system allows for a student to request a class whether or not a teacher has been assigned to the class.	High	X						
41	The system allows a method to lock in specific course sections into the students schedule and allows the other requests to be scheduled around that course.	High	X						
42	On rare occasions, students may not be able to have courses in certain periods during the day. The system has the ability to accommodate that student during the request process.	High	X						
43	The system allows for study hall routines that will place students into study hall sections automatically.	Medium	X						
44	At the middle and elementary schools, administrators often desire to provide heterogeneous or homogeneous scheduling. The system has the ability to group students by criteria such as band, gifted and talented, test scores, etc. and relate these groups to courses.	Medium	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
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45	The system provides mass input routines to change schedules and course requests must be available by grade, gender, team, homeroom and individual students.	High	X						
46	During an add, delete or drop/add process the system provides each school with the option to track the reason for the transaction(s).	Medium	X						
47	When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department and semester code. Moreover, the system should help the school personnel in deciding the courses that fit the student's schedule.	High	X						
48	When doing schedule changes, the system provides the school personnel with on-line information as to the number of available seats. The system should allow for overrides and entering conflicts but provide warning messages when this occurs.	High	X						Through student notes.
49	The actual scheduling routine balances by class section and by gender.	High	X						
50	The scheduling program accounts for a student's degree of difficulty, course priorities and student priorities. Once a scheduling run has been completed, the system has the ability to save the complete students and then work with the incomplete students only.	High	X						
51	The system has a program that builds the master class offering and then is used to do the actual scheduling. The system allows a school to define teacher restrictions, room restrictions, and class availability.	High	X						
52	After the master is created, the system provides the school with the option to rollover the information as a starting point for the upcoming year.	High	X						
53	The system provides a report and view of a Master class list.	High	X						
54	The system provides a report and view of a Course request list by course or by student.	High	X						
55	The system provides a report and view of Request tallies.	High	X						
56	The system provides a report and view of Room usage.	High	X						
57	The system provides a report and view of Teacher usage.	High	X						
58	The system provides a report and view of Period or class load analysis, including doubletons.	High	X						
59	The system provides a report and view of courses in conflict.	High	X						
60	The system provides a report and view of courses in conflict by student.	High	X						
61	The system provides a report and view of Student requests in either a list or matrix format.	High	X						
62	The system provides a report and view of Student schedules.	High	X						
63	The system provides a report and view of Teacher schedules.	High	X						
64	The system provides a report and view of scheduling conflicts.	High	X						
65	The system provides a report and view of Unscheduled students list or matrix.	High	X						
66	The system provides a report and view of Class lists.	High	X						
67	The system provides a report and view of Class distribution.	High	X						
68	The system provides a report and view of Room and teacher availability.	High	X						
69	The system provides a report and view of Drop/Add information.	High	X						
70	The system provides a report and view of Incomplete student schedules.	High	X						
71	The system provides a report and view of Students with too many courses.	High	X						
72	The system provides a report and view of Number of seats open by hours/periods and seats/by grade.	High	X						Yes, the Open Periods by Grade ad Period report (OSM603)
73	The system provides a report and view of Rooms-by teacher, by room, by hour.	High	X						
74	In the drop/add reports, the information is available by: the person that entered the schedule change, the teacher, the student and the counselor. The report log includes the reason, time and date of the change.	High						X	This functionality could be accomplished with customization. Edupoint could scope and quote with more information.

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75	The system provides an incomplete student schedule report and includes the open periods in a student's schedule.	High	X						
76	The system generates a Conflict report that allows refining a master schedule by listing courses scheduled at the same time.	High	X						
77	The system provides a fully automated scheduling system (scheduling rooms, courses, teacher, and aides).	High	X						
78	The system allows students to be scheduled selectively by grade, gender, name, or a set priority.	High	X						
79	The scheduling process has gender balance with the ability to query by course by gender.	High	X						
80	The system provides Course sections with the ability to restrict by gender.	High	X						
81	The system has the ability to prioritize students for scheduling based upon a random algorithm. The system should not prioritize students according to name or ID.	High	X						
82	The system has the ability to link semester one and semester two of a course so scheduling priority is given to the same teacher and same period. Also, the system has the ability to schedule unrelated one-semester courses in different semesters.	High	X						
83	The system has the ability to schedule singletons and priority courses first during the scheduling process.	High	X						
84	The system supports the scheduling of students in groups or blocks of courses.	High	X						
85	The system supports scheduling of sequenced, co-requisite and pre-requisite, anti-requisites, schedule before, schedule after, schedule opposite classes. The system includes auto-checks for pre-requisites before allowing a course to be added to a student's schedule, as well as auto-checks to see if a student has already taken and passed the course	High	X						System has ability to check for all of those things except for if the student has already taken the class and passed in a previous school year.
86	The system supports scheduling utilizing classes of variable sizes.	High	X						
87	Classroom maximum seating is enforced by the system with the ability to override.	High	X						
88	The system provides the ability to override maximum class enrollment for authorized users.	High	X						
89	The system allows the ability to schedule courses offered less than five days per week.	High	X						
90	The system provides the ability to schedule single or multiple semester classes.	High	X						
91	The system supports locking a scheduling run and preventing it from being deleted or modified.	High	X						Yes, a user can lock a scheduling run and and prevent others from deleting it.
92	The system provides for mass scheduling of students as well as individual student scheduling. The system provides for walk-in student scheduler for students enrolling after the start of the school year. After adding the course requests for a student, the system automatically schedules the student from that input screen. Once completed, the system determines if the student received all the courses requested or if there is a scheduling conflict.	High	X						
93	The system allows a mix of automated student scheduling and manual input.	High	X						
94	The system provides the ability to schedule sub-groups of students (e.g., juniors).	High	X						
95	The system allows course request alternates. Alternates can be automatically scheduled if requested courses are full. This must be based on graduation requirement category.	High	X						
96	The system allows courses to be assigned to a Department and House / Team. The system also allows the students to be scheduled by the House/Team.	High	X						
97	The system provides the ability to set a course priority for scheduling purposes.	High	X						
98	The system provides the ability to mass load, mass update, mass replace, and mass delete course requests.	High	X						

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99	The system has the ability for students to be scheduled automatically from course requests any time during the school year.	High	X						
100	The system allows students to enroll in courses in district schools other than the school that the student is currently registered in. The system allows for cross-enrollment flexibility with the ability to track a student and all associated data regardless of where they are enrolled. The system provides clear indication of cross-enrollment status.	High	X						
101	The system allows the user to perform “what-if” analysis by running the master schedule builder multiple times, simulating the student requests into these schedules changing parameters each time. The system saves each master schedule and allow the user to choose which one to use as the master. The system provides the ability to easily compare different scenarios.	High	X						
102	Once the final scheduling run has been approved, The system allows the previous “what-if” versions to be purged.	Medium	X						
103	The system identifies potential conflicts by identifying a group of students requesting two or more of the same courses (i.e. if many students request both Orchestra and Honors Math. The system warns the user that there is a potential conflict with these two courses). The system has the ability to compare conflicts of a mass of students or individuals.	High	X						Users can see this information, but will not get an automatic warning.
104	The system provides a conflict matrix of each student with irresolvable conflicts, indicating all courses selected and corresponding master schedule class possibilities, and flagging master schedule classes that are filled.	High	X						
105	The system allows mass updating of the course catalog and master schedule.	High	X						
106	The system provides the ability to mass update and move students from one scheduled course into another.	High	X						
107	The system allows the prioritizing of individual students for scheduling and the flexibility of scheduling by building.	High	X						
108	The system provides the ability to print a room usage report, which lists the courses meeting in the room, the course code and description, meet schedule, seats used, and whether the course-section is full.	High	X						
109	The system provides a user-friendly means (e.g. one screen, one step) of entering course requests, modeling a schedule, and enrolling a student in a modeled schedule.	High	X						
110	The system has the ability for grades and assignments to be copied from a course that is dropped to one that is added.	High	X						
111	The Re-Enter Student/Re-Activate Schedule reactivates students withdrawn with the previous option. It re-enters the student in Demographics and makes them active, and re-adds all the saved courses, if class size allows.	High	X						
112	The system scheduling capabilities have no fixed limits for the number of periods per day or for the number of grading periods per year.	High	X						
113	The system supports multiple “time period” (aka bell) schedules.	High	X						
114	The system provides the functionality to handle multiple time schedules within the same building and multiple teams within a time schedule in a building.	High	X						
115	The system provides the ability to automatically assign students to a team based on a course selection.	High	X						
116	The system allows on-line schedule changes. Also, schedules are capable of being generated and printed immediately.	High	X						

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117	The system has the ability to generate hall passes on demand based on the students schedule.	Low	X						The Student Summons report (STU223) generates a pass for a student to report to the guidance counselor or office at a specified time, based on the student's schedule.
118	The system allows the school to use the current year master schedule as a starting point for next year's master schedule.	High	X						
119	The system supports scheduling of sequenced, co-requisite and pre-requisite classes. The system checks for course prerequisites before scheduling students. The prerequisites can be entered centrally in the course catalog.	High	X						
120	The system shall check that minimum criteria (i.e. passing grade) for pre-requisite course are fulfilled before allowing enrollment to dependent course.	High	X						
121	The system produces a warning message when the user attempts to request a course for a student that the student is currently taking.	High	X						Only for online course requests.
122	The system allows the user with the proper security to freeze (close) certain sections or courses during the scheduling process.	High	X						
123	The system provides mechanism to increase the likelihood that a section will fill (increase its priority).	High	X						
124	The system allows a report to be requested that lists the individual students' course requests and alternates, if any.	High	X						
125	The system provides an Alternate Course which identifies the course to substitute if the Student Scheduler is unable to schedule the primary request.	High	X						
126	The system has an option to allow alternate course requests only for elective courses.	High	X						
	The system has an option to schedule alternates based upon subject category.	High	X						
127	The system supports a building-specific course catalog (Name, description, state course id and name, subject/department, campus availability, fees, credits, pass/fail indicator, active/inactive course indicator, semesters or marking periods the course is offered, textbook title assigned to course, etc.).	High	X						
128	The system allows the authorized user to copy the course catalog from one year to another before editing.	High	X						
129	The system supports definition of required and elective courses.	High	X						
130	The system allows for a course to be inactive in the course catalog, without deleting the course.	High	X						
131	The system provides the ability to define a Block or Super Course that groups a number of courses for scheduling purposes.	High	X						
132	The system supports a mix of standard and blocked classes within the same schedule.	High	X						
133	The system supports all manner of traditional and non-traditional schedules including block, modified block, teaming, mosaic, and rotating schedules.	High	X						
134	The system has the ability to facilitate scheduling for teams or family style teaching. (Students from the same team receive teaching from the same group of teachers for core classes. For electives, students are able to receive teaching from non-team teachers.)	High	X						Yes, through the use of House Scheduling in Mass Scheduling and Master Schedule Builder.
135	The system has the ability to assign teachers to teams for family style teaching. If teachers are assigned to a team, the system is able to recognize the team and to give the teachers in that team a common prep period for planning purposes.	High	X						
136	The system has the ability to assign multiple teachers to a class for team teaching options	High	X						
137	The system provides the option for elementary scheduling (automated or manual).	High	X						

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138	The system supports developing a departmentalized Elementary schedule by homeroom, student group, or individual students.	High	X						
139	The system supports Elementary self-contained classes and departmentalized classes by grade level with each school.	High	X						
140	The system provides the option for homeroom assignments (mass or individual).	High	X						
141	The system provides the option to assign classes by homeroom assignment.	High	X						
142	The system allows assignment of multiple teachers or paraprofessionals for Elementary scheduling.	High	X						
143	The system allows mass assignment of counselors.	High	X						
144	The system allows individual course request entry as well as for a group of students or by grade.	High	X						
145	The system has an option to not allow or to warn counselor when a duplicate course request is entered.	High	X						
146	The system allows user with the proper security to easily and quickly replace a teacher with another. This includes movement of all teacher information, e.g. grade book.	High	X						
147	The system provides separate schedules for current and next year scheduling.	High	X						
148	The system scheduling routine balances class enrollments by class section, so that a particular section of a class does not have a larger number of students than another section.	High	X						
149	The system has the ability to quickly add courses to a student's existing schedule or to drop courses from a student's schedule. When adding or changing classes, the on-line process allows the user to retrieve the classes by a combination of period, course, department, etc. Moreover, the system helps the school personnel in deciding the courses that fit the student's schedule.	High	X						
150	The system provides a current enrollment summary of each course and section. The user is able to view or generate a printed report containing this summary information.	High	X						
151	The system provides online tally report to show the total number of course requests for each course updated real-time. The system provides drill-down capability from the tally into the students requesting each course. Also The system provides a hard-copy report of the simple tally by course number at each school, also by grade and gender.	High	X						
152	The system provides a free period analysis report, which summarizes the number of students who have a specific period free.	High	X						
153	The system provides a free time detail report, which shows the open periods in the student's schedule, per cycle day and grading period.	Medium	X						
154	Once a scheduling run has been completed, the system saves the completed students and then work with the incomplete students.	High	X						
155	The system provides schedule exception reports for students with under/over scheduled, open periods, taking courses already passed on transcript, etc.	High	X						
156	The system provides online, real-time access to various reports to assist with scheduling students, such as listing the catalog, master schedule, class lists, class roster, incomplete student schedules, room and teacher availability, etc., sorted by any field on the report.	High	X						
157	During the scheduling process, the system has a shuffle option that can be utilized. The shuffle option shuffles students from one section to another or reschedule students to improve the overall scheduling rate. The system allows for the option to not touch student who have been fully scheduled.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Scheduling Requirements	Priority	Y	C	M	F	3	N	
158	The system allows for the addition of new courses and sections at any time during the school year.	High	X						
159	The system provides a "Teacher's Schedule" report that presents teachers' schedules in a list or grid format.	High	X						
160	The system has the ability to print schedules sorted by distributing period and date, by homeroom teacher, for future or current schedules.	High	X						
161	The system provides a "Seat Availability" report which lists requests and seat counts, including total seats, seats needed and seats available, for each course.	High	X						
162	The system provides a "Seat Availability" report which lists seat counts, including total seats and seats available, for each combined class (multiple courses meeting the same period with the same teacher).		X						
163	The system provides scheduling performance statistics, including number and percentage of requests scheduled and students scheduled.	High	X						
164	The system provides class transfer history log indicating all changes by date.	High	X						
165	The system allows a school to define teacher restrictions, room restrictions, and class availability.	High	X						
166	The system has the ability to automatically make a first attempt at balancing classes based on gender, ethnicity, language, IEP, 504, new students, gifted students, etc. allowing user specification of the fields used to determine balancing.	High	X						
167	The system allows multiple meeting time sessions per course in the Master Schedule, allowing efficient scheduling of lab courses, double meeting time courses, and courses with split meeting times.	High	X						
168	The system allows combined class scheduling to allow multiple classes to be taught by the same teacher in the same period and room.	High	X						
169	The system has the ability to automatically remove the student from all of his/her scheduled classes and reduce the class sizes.	High	X						
170	The system supports alternate day bell schedules to accommodate early release days, testing days, or other district-defined calendar.	High	X						
171	The system provides the ability to track a student's career or multi-year schedule plan and automatically update that plan as the student moves from year to year. The system allows the student/parent to update through the parent/student portal.	High	X						
172	The system should allow the ability to mass load student requests based on the students career or multiyear plan.	High	X						
173	The system produces a personalized list of suggested course selection for a student based on the course offerings, student's graduation requirements, student's special needs (e.g. Individual Education Plan, Bilingual/ESL etc.), credits earned on the student's transcript, and student's current schedule. The suggested course election lists only those courses available to the individual student. For areas where the student can choose between multiple courses, each course is listed.	Medium						X	
174	The system provides an alert and report of students who didn't get a class that is necessary to meet graduation requirements.	High						X	This functionality could be provided with customization. More information is needed to fully scope and quote.
175	The system allows the user to define special room needs by course and teacher.	Medium	X						
176	The system allows for manually closing a section so that no students can be scheduled into that section.	High	X						

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177	The system provides an easy method to view the number of times a certain course was requested as a primary and an alternate.	High	X						
178	The system provides a tally and report number of alternates substituted according to the primary course and the alternate course.	Medium	X						
179	The system allows the definition of required courses by student program, grade level, and graduation path.	Medium	X						
180	The system allows scheduling for elementary school needs including selection, sorting and assignment by Grade level	High	X						
181	The system allows scheduling for elementary school needs including selection, sorting and assignment by Gender.	High	X						Yes, with regular loader or Master Schedule Builder
182	The system allows scheduling for elementary school needs including selection, sorting and assignment by District-defined Placement Classification.	High	X						Yes, with regular loader or Master Schedule Builder
183	The system allows scheduling for elementary school needs including selection, sorting and assignment by Homeroom.	High	X						
184	The system allows scheduling for elementary school needs including selection, sorting and assignment by Core subjects.	High	X						
185	The system allows scheduling for elementary school needs including selection, sorting and assignment by Specialty and Pull-out classes.	High	X						
186	The system allows scheduling for elementary school needs including selection, sorting and assignment by Resource classes.	High	X						
187	The system supports the ability to track course prerequisites over multiple years.	High	X						
188	The system provides a secure web-site for entry of student course requests.	High	X						
189	The system provides a method for counselors to enter student requests on-line with a student.	High	X						
190	The system provides the ability to run the scheduler selectively by semester as an option.	High	X						
191	The system provides the ability to work on a current year proposed schedule change (increased FTE after the start of school) and mass-schedule students against it to determine if it's a viable schedule to implement.	High	X						
192	The system warns of Special Ed status when schedule changes are made for special Ed students.	High						X	
193	Special Ed courses are limited to Special Ed students. The system has the ability when entering course requests but can be overridden.	High						X	
194	The system provides the option to enter text describing the courses offered, which may be compiled and printed to serve as a course selection booklet.	High	X						
195	The system provides as an on-line interactive conflict matrix without printing a report. The system allows the user to drill down into the count to see the names and id numbers of students requesting the conflicting courses.	High	X						
196	The system has an interactive conflict matrix that allows one click lookup of individual students requesting each pair of courses.	High	X						
197	The system provides as individual student timetable grid with on-line feedback of class options and restrictions.	Medium	X						
198	The system allows course Fees to be tracked in the course catalog. These fees "pop up" as required during scheduling.	High	Partial						Partial. Synergy does allow for Fees to be tracked on the District Course screen if they are setup for Direct Payment Mode, it does not give a popup when manually scheduling students or assigning course requests.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Scheduling Requirements	Priority	Y	C	M	F	3	N	
199	The system indicates those classes which require a fee when the class is requested by the student, or entered by the counselor.	High	X						
200	The system provides the ability to track a teacher's Highly Qualified Teacher status and alert the scheduler when an unqualified teacher is assigned to teach a class.	High	X						Teachers can be assigned this status and Master Schedule Builder can use this to schedule teachers.
201	The system allows the user to define teacher qualifications and preferences to be used in scheduling.	High	X						
202	The system tracks the Teacher Certification number.	High	X						
203	The system has the ability to see open classrooms information for each period online (i.e. classrooms unoccupied, number of seats open in each period, etc.)	Medium	X						
204	The system has the ability to create teacher notifications that indicate both the old and the new course and section assignments when changing a course on a student schedule (changes report/email sent to teacher). This is be used to notify both affected teachers to help ensure that the student goes to the new class for which he has been scheduled.	High	X						Through TeacherVUE, log into classes.
205	The system has the ability to make available the schedule for the transfer student in the former school online for the new school to refer to when preparing the student's schedule in the new school.	Low						X	
206	Student schedule changes are automatically reflected in teacher's grade book.	High	X						
207	The system has the ability to assign text books to courses in the master schedule (i.e., title of text adopted for course).							X	
208	The system provides an on-line, interactive Master Schedule Builder program that builds the master class offering which are then used to do the actual student scheduling. Each school is allowed to define teacher restrictions, room restrictions and class availability.	High	X						
209	The Master Schedule Builder optimizes the placement of course-sections based on the student course requests and the school-defined restrictions to automatically assign courses into class periods.	High	X						
210	The system allows the authorized campus user to perform "what-if" analysis by running the master schedule builder multiple times, changing parameters each time. The system saves each master schedule and allows the user to choose which one to use as the master.	High	X						
211	The system allows the authorized campus user to perform "what-if" analysis on their current year schedule by running the master schedule builder multiple times, changing parameters each time. The system saves each master schedule and allows the user to choose which one to use as the master.		X						
212	The system supports the scheduling of courses of varying lengths such as full year, semester, trimester, and 9-week, grading period, and/or wheel courses.	High	X						
213	The system allows schools to load teachers and classrooms as resources and also, as an option, allow teachers and classrooms to be assigned to courses.	High	X						
214	The system has the ability for miscellaneous resources to be set up into groups, such as departments, which allows for greater flexibility when scheduling courses.	Medium						X	
215	The system automatically calculates how many sections of a course are required by comparing the number of student requests for a course with the maximum number of students allowed in the specified course, but allows user to override.	High	X						
216	The system allows courses to be scheduled in combinations, by specifying that certain courses must be scheduled during the same period, in the same room, and with the same teacher.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Scheduling Requirements	Priority	Y	C	M	F	3	N	
217	The system provides reports to assist in determining any errors or questionable areas that need user intervention.	High	X						
218	The system allows course information can be copied from one year to the next.	High	X						
219	The system provides a ability to secure the teacher social security number so that it can only be seen by users with the proper security.	High	X						
220	The system has the ability to specify valid periods by courses or by section if applicable. Some periods defined in the system are only valid with certain courses. The system allows the user to note what periods are valid with each course or section. If no values are assigned, the system assumes that the course could be taught during any period.	High	X						
221	The system allows classes to meet non-consecutive periods (i.e.: first and third period, A-day and B-day).	High	X						
222	The system provides a utilization reports for teacher, room, or course.	High	X						
223	The system should allow the user to define on a teacher-by-teacher basis how many classes each teacher can teach.	High	X						
224	The system allows the user to build some of the sections or courses into the master schedule prior to building the rest of the master schedule. (i.e., in some cases, the user may know up front that a certain section of a course must be taught at a certain time of the day.)	High	X						
225	The system allows assignment of teacher planning periods or other district-defined reservation labels before, during, and after scheduling.	High	X						
226	The system provides a the ability to inactivate a course by school year without deleting the course.	High	X						
227	The system provides a the ability to activate course by school year.	High	X						
228	The system has the ability to track instructional staff (ID, social security number, name, initials/short name, buildings, team, department, homeroom, teacher load, email address, etc.)	High	X						
229	The system provides the ability to assign a maximum of 4 staff members to a class.	High	X						Yes, users can assign multiple staff per class.
230	The system provides as for assigning individual students a scheduling priority.	High	X						Yes, by grade level only.
231	The system has the ability to identify which teachers are CTE (voc ed) teachers in current school year, including current license status and expiration.	High	X						
232	The system provides a report that shows a graphic of master schedule--teacher, room, hour, course, section #. This includes highlighting classes that are full.	High	X						Through ClassBoard and the following reports: OSM414, Schedule By Department OSM415, Schedule by Room
233	The system moves the assignments with grades achieved on those assignments to a new class when the teacher is the same teacher for both classes.	High	X						Via Grade Book.
234	The system has an option to either track students or NOT track students as needed.	Medium	X						
235	The system has the capability to identify students who need to be separated when scheduling and maintain this separation for all classes.	High	X						
236	During the creation of the master schedule, the system allows the locking of specials (art, PE, music) into the students' schedules and the flexibility to change the core classes.	High	X						
237	The system allows administrators/counselors to easily view and print student's missing assignments and progress reports.	High	X						
238	The overall menuing system has simplicity and ease of finding information. It incorporates the use of "favorites."	High	X						

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239	The system has the ability for teachers to have access to information such as counselor's observations, students' IEP and 504 plans with user defined restrictions.	High	X						
240	The system has the capability to link specific classes so that they will have the same teacher for both classes such as Communication Arts and Reading without tracking the students.	High	X						
241	The system has the capability to easily re-schedule a specific course, grade or the entire school after the system has rolled over to the next year.	High	X						
242	The system has the capability to lock in schedules for specific groups of students (such as SPED) while modifying other students schedules during the scheduling process.	High	X						
243	The system allows "drag and drop" scheduling when creating the master schedule.	High	X						Through the use of Classboard.
244	The system has the ability to print D and F list from teacher gradebook in real-time on a daily basis.	High	X						
245	The system has the ability for Scheduler awareness of student requests or scheduled classes in other buildings and schedule around them.	High	X						
246	The system has the ability to schedule virtual classes without a period.	High						X	Synergy requires all classes to have a period.
247	The system has the ability to have a group of students and teacher flow in a class from year to year. (e.g. advisory class students have the same teacher all 4 years) AKA "cohort scheduling".	High	X						
248	The system has the ability for a course to include but not be limited to a course code, category/subject, title, description, course level (remedial, general, special ed, enriched, etc.) a sequence and sequence total (to allow determining if this is for example a 1 of 4 classes), credits possible, credit category by diploma, allowing multiple possible categories, grade level, targeted program(esl, special ed, gifted, migrant, at-risk, general, etc.), delivery type (e.g. virtual, distance learning, general, self-contained multi grade, self-contained single grade), college credit, vocational (approved not funded, approved and funded, exploratory not funded), state course code information, non standard flag, parent portal flag, display on report card, display on transcript, display on student schedule, requires counselor approval, include in GPA flag, honors flag, AP/IB flag and whether it is a high-school rigor course.	High	X						
249	The system has the ability for district defined courses by school level. Each school pulls from district course catalog by school level (HS, MS, ELEM).	High	X						
250	The system has the ability to create a report of student requests for a certain course (a low enrollment course that is closing and need a list of students who have requested it).	High	X						
251	The system has the ability to create a report of students by grade, counselor, homeroom, etc. who are missing period x.	High	X						
252	The system provides a means of scheduling a single student based upon conflicts. This conflict scheduling screen includes a button that pulls up a course matrix screen that shows all sections of each class by period, as well as the number of students in each section. It allows rearranging a student's schedule just by looking at this one screen.		X						Through the use of Walk In Scheduling, Quick Placement tab.
253	The system allows for both computer balanced scheduling of students into courses, or arena (tennis shoe) scheduling.		X						
254	The system provides a single student scheduling screen that allows the counselor to select a student, select a pre-defined set of courses the student may take, and then allows the counselor or student to select specific courses and schedule the student into them. The screen display includes a graphical matrix-style display of the master schedule and include such scheduling specific information as seats available, seats taken, day patterns, etc.		X						Through the use of Walk In Scheduling, Quick Placement tab.

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255	The system provides the ability on the online option/course selection sheet to have a link to optionally the School course description, or the district course description. For example, if a student needs to choose from something in the Fine Arts category they could click on the name "stained glass" and up pops a description of the course.		X						Synergy shows descriptions below the courses in online course requests.
256	The system provides the ability to limit the number of special students to be scheduled into a section. The types of special students includes but is not limited to special education students and ELL students.							X	No, Synergy can only limit by overall class size.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Grades Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system allows definition of a district-wide grade scale by school and school type (elementary, middle school, junior high and high school).	High	X						
2	The system supports a grade scale that allows definition of mark symbol (A, A-, etc), grade points, and whether or not the grade earns credit.	High	X						
3	The system allows modified grading scales by course.	High	X						
4	The system stores and retains Grade data by school year, so school district personnel can design and generate reports comparing grade information.	High	X						
5	The system stores all cumulative credits earned.	High	X						
6	The system stores and distinguishes between high school and non-high school cumulative credits earned.		X						
7	The system allows the guidance department to track the colleges applied, accepted, and attended. For each, the user needs to enter the appropriate dates.	Medium	X						Some of this data can be tracked via the Career Plan others can be tracked by User Defined data.
8	The system allows the guidance department to track scholarships awarded.	Medium	X						Some of this data can be tracked via the Career Plan others can be tracked by User Defined data.
9	The system provides the ability to keep an audit of Report Card Status. This keeps track of how records are used by the Student Scheduling and Grade Reporting modules. Example: The course is dropped in Scheduling, but remains active in Report Cards, the course is dropped from Scheduling and Report Cards, the report cards information for this course has been copied to another course, etc.	High	X						Although grades are course-specific, they do not transfer.
10	The system provides the ability to create a report for Student ID List.	High	X						
11	The system provides the ability to create a report for Address list.	High	X						
12	The system provides the ability to create a report for Mailing labels.	High	X						
13	The system provides the ability to create a report for Student summaries.	High	X						
14	The system provides the ability to create a report for Grade record label.	High	X						
15	The system provides the ability to create a report for Activity list.	Medium	X						
16	The system provides the ability to create a report for College list.	Medium	X						
17	The system provides the ability to create a report for Scholarship list.	Medium	X						Via custom defined data.
18	The system allows notes to be included on report cards on a per school and per teacher basis.	High	X						
19	The system allows the user to map district course equivalents for out of district transfer students.	Medium	X						
20	The system allows for courses on the student's report card to be sorted by building, course number and section or course description, period of the day, etc., or any combination as selected by the user.	High	X						
21	The system supports centralized district-wide production of Progress Reports and Report cards. Groups of schools can be processed separately. Mailings can be sorted by zip-code district wide. Each school is also be able to print their own Progress Reports and Report cards.	High	X						
22	The system allows a variety of marks per marking period as well as final grades to meet the needs of the district.	Medium	X						
23	The system allows a flag or mark to indicate a student's course is incomplete, withdrawn, or failure.	High	X						
24	The system provides the ability to automatically calculate letter, numeric, grade point, and credit equivalencies based on official grading tables.	High	X						
25	The system provides the ability to query students who are below and above a user-specified GPA or grade by single or multiple criteria (e.g., grade level, teacher, subject, alphabetically, D and F lists, etc.).	High	X						

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26	The system provides the ability for each campus to define which of their grades will exclude students from any honor rolls.	High	X						
27	The system, optionally allows narrative comments to be printed in full text form on progress reports and report cards.	High	X						
28	The system provides a mechanism where the student can transfer to a new school at the beginning of the second semester, while the sending school retains the ability to enter grades and other report card information for the student and produce a report card for the student.	High	X						
29	The system provides the ability for comments to be automatically personalized using “gender smart” pronouns.	High	X						
30	The system provides the ability to print school-defined messages on report cards.	High	X						
31	The system provides the ability to print the promotional status of a student on the report card.	High	X						
32	The system provides for data entry routines that allow for the entry of grades, comments, class absences (excused, unexcused, and tardy) by marking period, course, and student to occur in one process.	High	X						
33	The system provides the ability to identify students in danger of retention, or with other risk indicators.	High	X						
34	The system provides a printable report that includes student, grades, and credits earned.	High	X						
35	The comprehensive system generates not only progress report cards at mid-marking period and on demand, but also on-demand interim period reports.	High	X						
36	The system's interim progress reporting function supports all grading periods and multiple runs per grading period.	High	X						
37	The system allows all types of class absences to be shown on progress cards for each course-section for each grading period.	Medium	X						
38	The system allows users to copy comments from the Report Cards or allow them to enter separate comments for the Progress Report cards.	High	X						
39	Elementary grading rosters are automatically built based on scheduled homeroom.	High	X						
40	The system allows authorized users to enter grades for an individual student, for all students in a class, or for all classes taught by a teacher.	High	X						
41	The system allows Pre-K and elementary grading using multi-level subject and curriculum frameworks.	High	X						
42	The system's Progress Report card feature allows the user to add grades, comments, and optionally absences for students enrolled in a specified course, with the ability to change grades, comments, and absences that have already been entered.	High	X						
43	The system allows attendance to be automatically transferred to interim progress reporting.	High	X						
44	The system allows students to take courses in various buildings within the school district and have those courses listed on Progress Report cards printed in their home buildings, or alternatively the progress report is generated by the serving school.	High	X						
45	The system allows school-wide and grade level messages to be printed each interim period on the Progress Report cards.	High	X						
46	The system provides a comprehensive set of Interim Progress reports (e.g. the Progress Report Summary Report, the Progress Report Comment Usage Report, etc.).	High	X						
47	When a course covers multiple subject areas, the system allows credit to be evenly split between areas, full credit to go to all areas, or credit to be allocated on an as needed basis in a defined order of hierarchy.	High	X						
48	The system identifies repeated courses.	High	X						

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49	The system allows Testing information to be added to the report card.	High	X						
50	The system allows skills and standards-based grading and assessment.	High	X						
51	The system allows district defined standards that are associated with grading.	High	X						
52	The system allows an unlimited number of identifiers defined by the district. e.g., "Identifies the uppercase letter 'A'".	High	X						
53	The system allows printing standards and identifiers in multiple languages.	High	X						
54	Standards and identifiers are assignable to multiple grade levels.	High	X						
55	The system provides the ability for students to be automatically assigned the standards and identifiers defined for their grade level.	High	X						
56	The system allows district to define list of valid marks for individual standards.	High	X						
57	The system has completely configurable report card template capable of printing standards, identifiers, traditional grades for scheduled courses, attendance totals and comments.	High	X						
58	The system allows mastery, proficiency, and observational-based assessment.	High	X						
59	The system provides the ability to generate a letter to parents when their child is ineligible to participate in sports or other activities because of failing grades.	High	X						
60	The system provides the ability to generate reports and letters for failing students in order to properly notify and verify with student's parents/guardians.	High	X						
61	The system allows school level grade distribution analysis reports sorted by teacher and course.	High	X						
62	The system allows complete district level reporting, analysis, and data mining.	High	X						
63	The system provides for a grade summary report that includes all the students grades for each marking period along with absences, tardies, GPA's and class ranks for each of those GPA's.	Low	X						
64	Authentication through the teacher website is capable of integrating with Active Directory/LDAP.	High	X						
65	The system provides the ability to prevent (lock down) any teacher grade changes by a specified date.	High	X						
66	The system provides Cumulative GPA and marking period GPA's displayed by year and by school with GPA, gpa points and the credits that were attempted and earned.	High	X						
67	The system provides the ability to handle alphabetic, numeric or combination grading. Each school may have its own grading scheme; the system provides the flexibility to address the unique needs of each school, controlled at the district level.	High	X						
68	The system provides the ability to attach a minimum of 3 comments per course per grading period. There is an unlimited pool of comments that are district, building and user-defined.	Medium	X						
69	The system provides the capability of storing comment descriptions in multiple languages.	Medium	X						
70	The system shall provide selected grade list.	High	X						
71	The system shall provide grade distribution by class and by teacher report.	High	X						
72	The system shall provide grade summary report that includes all the students' grades for each marking period along with absences, tardies, course weights, GPA's and class ranks for each of those GPA's.	High	X						
73	The system shall provide Honor Roll report.	High	X						
74	The system shall provide an option for grade collection forms for mass processing.	High	X						
75	The system shall provide an option for grade collection directly from teacher gradebook systems.		X						
76	The system shall provide grade verification sheets after the grades have been scanned or keyed in.	High	X						

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77	The system shall provide report cards that address the secondary and elementary schools.	Medium	X						
78	The system shall provide report cards in mail ready format.	High	X						
79	The system shall provide class rank reports.	High	X						
80	The system shall provide students missing marks/grades for a particular marking period.	Medium	X						
81	The system shall provide special awards and honors (National Merit Scholars, etc.).	High	X						
82	The system allows user defined letters to be sent at virtually anytime throughout the year. The letter is of a flexible format to include user-defined text, courses, teachers, projected grade, recommended course of action, and the reason for the grade.	High	X						
83	The system allows for the grades and comments to be keyed in.	Low	X						
84	The system provides the ability for the school to have separate tables to define the lack of progress codes and/or commendation codes.	High	X						
85	The system provides data collection forms available for easy data entry.	High	X						
86	The system provides a status report that lists all the students in danger of failing, failing and/or passing.	High	X						
87	The system supports a flexible design of the interim progress and report card formats.	High	X						
88	The system allows for report card formats that meet the separate needs of elementary and secondary schools.	High	X						
89	The report cards package permits alpha-numeric grades, along with special characters (e.g. pluses and minuses).	High	X						
90	The system provides report cards that can be viewed on screen and printed for individual students, selected students, and in mass.	High	X						
91	The system provides transcripts that be viewed on screen and printed for individual students, selected students, and in mass.	High	X						
92	The system provides the ability for parents or guardians to view transcripts on Parent Portal and print unofficial transcript.	High	X						
93	The system allows report cards to be sorted for distribution by allowing the user to select from various fields including building, a designated period of the day, student's name, grade, homeroom, homeroom teacher, zip code, etc., or any combination of the fields.	High	X						
94	The system supports a variety of marking period configurations.	High	X						
95	The system supports citizenship/conduct grades for each class and marking period.	High	X						
96	The system provides the ability to calculate the final grade automatically based on defined weighting of the components used and allows the final grade to be manually entered or overridden with a reason. The system has the ability to view audit trail of changes and activity.	High	X						
97	The system provides the ability to calculate the semester average automatically. Marking period and exam grades are given the proper weight (e.g. 25% for each of three marking period grades and 25% for the semester exam grade.) This is flexible and district-defined. The system allows the semester average to be manually entered or overridden.	High	X						
98	The system provides the ability for grade-related information for report cards to be imported/uploaded/posted from other packages, including semester and final grade averages.	High	X						
99	The system allows grades to be entered by either student or course, and the students grade level is displayed on the entry screen.	High	X						
100	The system allows the user to specify the minimum criteria and thresholds for all honor roll related reports.		X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Grades Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
101	The system supports honor roll and GPA calculations based on any defined mark type such as marking period, semester, exam grade, or on the final grade, as well as cumulative honor roll. The system provides for exclusion of students from any of these calculations based upon district policy.	High	X						
102	Report cards can include transcript-like summary of full multi-year grading histories such as total credits earned, accumulative GPA.	High	X						
103	The system provides the ability for the district to determine, the honor point value of marks; how marks will be used in honor roll, GPA, and credit calculations (both full and partial credit); designate if the mark is a passing mark; and determine whether the mark or value should print on report cards. Different quality points may be awarded based on the type of course (whether a course is a regular course, honors, course, modified curriculum, etc.).	High	X						
104	The system provides the ability to produce Report cards and grade verification sheets for each grading period.	High	X						
105	The system supports alpha or numeric teacher comments per student, per course. Comments may be printed on the report cards.	High	X						
106	The system supports attempted credit and earned credit calculations.	High	X						
107	The system supports unlimited levels of non-weighted and weighted grades, and support district policies for calculating full (or partial credit optional).	High	X						
108	The system supports copying grades from a dropped course to the added course in one step.	High	X						
109	The system interfaces with daily and/or class attendance, allowing attendance information to be printed on report cards. Attendance types for daily and class attendance can be printed on the report card per student, per marking period. (e.g. excused, unexcused, tardy).	High	X						
110	The system supports students taking courses and programs on various campuses within the school district while having report cards printed by any authorized user regardless of building.	High	X						
111	The system provides missing grades report to determine grades that were not submitted.	High	X						
112	The system provides for user to report on selected grades such as invalid, incomplete, failing grades, or any other selected value.	High	X						
113	The system provides the ability to display all prior grading period report card information for current and prior years.	High	X						
114	The system allows for changing or correcting a student's mark after a mark reporting period by the authorized user.	High	X						
115	The system supports calculating and printing of various weighted and un-weighted grading gpa calculations.	High	X						
116	The system provides the ability to notify specified users when classes with fees have been dropped.	High	X						
117	Application should allow a course to be included on report cards but excluded from transcripts.	High	X						
118	The system provides the ability to save a "snap shot" of the class rank and view this information sorted in various orders. Example: By school, rank and school, grade, alpha order with averages, rank in class and official GPA.	High	X						
119	The system allows marks to be entered for any marking period at any time to allow for self-paced students who complete course work at varying times throughout the year.	High	X						
120	The system supports the tracking of course history data from other schools and districts, credits attempted, credits earned, and grades received.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Grades Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
121	The system allows for data entry of courses taken from other districts based on local or state course ID#'s.	High	X						
122	The system provides the ability to make changes in grades or credit information for prior years with a full audit trail of changes and only if user has the proper security.	High	X						
123	The system provides the ability for building defined grade posting date ranges.	Medium	X						
124	The system provides the ability for when grade and credit changes are made, provide the option for student's rank to be marked as "To be recalculated."	Medium						X	
125	The system provides the ability to easily access and maintain student course, grade, absence, and credit information from prior years as they are stored in the same database.	High	X						
126	The system provides for extensive ad-hoc reporting capability to include demographic data, grades, attendance, standardized testing, immunizations, rank information, GPA, earned and attempted credits, etc.	High	X						
127	The system provides simple instructions for set-up and operation of the system.	High	X						
128	The system provides the ability to easily run an Excel report of students who have previously failed any particular course – to simplify process of identifying students for credit.		X						Through the use of Query.
129	The system provides the classroom teacher the ability to optionally grade by period rather than grade by section.		X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system supports a flexible district-defined transcript format including, but is not limited to, student demographic and academic information, attendance, immunizations, standardized testing information, class rank, schools attended, district and school "transferred from", school's College Board Campus code number, state ID, comments, courses and semester and final grades received, earned credits, grade point averages, grand total credits, attempted credits, grade points and GPA, legend explaining district grade points. Courses can be listed in order by their assigned subject area or department.	Medium	X						
2	The system supports the Washington State High School Transcript.		X						
3	The system supports the ability to store and track for historical credit information: The course code and course title that was used when the student took the course.	High	X						
4	The system supports the ability to store and track for historical credit information: Grade level when the student took the course.	High	X						
5	The system supports the ability to store and track for historical credit information: The date the student completed the course, potentially independent of the end of the term.	High	X						
6	The system supports the ability to store and track for historical credit information: The letter grade the student received.	High	X						
7	The system supports the ability to store and track for historical credit information: The credits attempted	High	X						
8	The system supports the ability to store and track for historical credit information: The credits earned.	High	X						
9	The system supports the ability to store and track for historical credit information: The name and id number of the teacher.	High	X						
10	The system supports the ability to store and track for historical credit information: a course designator to identify the type of course.	High	X						
11	The system supports the ability to store and track for historical credit information: Whether or not the course is a vocational completer.	High	X						
12	The system supports the ability to store and track for historical credit information: The period the student was in when they took the course.	High	X						
13	The system supports the ability to store and track for historical credit information: The school that awarded the credit/course.	High	X						
14	The system supports the ability to store and track for historical credit information: Any Advanced Placement or International Baccalaureate number for the course.	High	X						
15	The system supports the ability to store and track for historical credit information: The state course code for the course.	High	X						
16	The system supports the ability to store and track for historical credit information: The grade points the student received as a result of the course and credit.	High	X						
17	The system supports the ability to store and track for historical credit information: The vocational CIP code and vocational indicator flag for the course.	High	X						
18	The system supports the ability to store and track for historical credit information: The course was taken at a high school level of rigor and should be evaluated as a high school course.	High	X						
19	The system supports the ability to store and track for historical credit information: The student received a vocational course certificate.	High	X						
20	The system supports the ability to store and track for historical credit information: The student took the course as an Alternative Learning Environment.	High	X						
21	The system provides access to credits earned/required by curriculum area by grade level for various sets of graduation requirements.	High	X						
22	The system maintains course history of classes taken in the district.	High	X						
23	The system maintains a history of credits from night school, summer school, correspondence, college, etc.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	
24	The system maintains granted equivalent credits on students entering from outside the District/State/US.	High	X						
25	The system allows for designation of the student's projected year of graduation.	High	X						
26	The system allows for designation of the student's year associated with the student's graduation requirements. Typically graduation requirements are set based upon a year of graduation. This field then describes the graduation requirements year for the student.	High	X						
27	The system tracks the student's actual year of graduation.	High	X						
28	The system provides for on-line graduation verification.	High	X						
29	The system produces user-formatted transcripts and permanent records.	High	X						
30	The system produces transcripts interactively as well as in batch mode.	High	X						
31	The system provides credits earned, required, and needed by subject area.	High	X						
32	The system provides for a High School Planner sub-system.	High	X						
33	The system provides for alternative diploma earned.	High	X						
34	The system provides a Graduation date.	High	X						
35	The system provides the ability to keep requests by future grade level for students either by specific student or group of students.	High	X						
36	The system automatically converts planned future course requests for the coming course and/or by curriculum area.	High	X						
37	The system allows eighth grade students to create high school plans.	High	X						
38	The system distinguishes between plans relating to high school graduation versus plans that relate to college or other post-high school program admission.	High	X						
39	The system allows access to scheduling records during the time that scheduling is being done so that counselor can see impact of decisions made during that process on the student's total plan.	High	X						
40	The system allows the assessment of student plans compared to various target plans and indicates the deficiencies.	High	X						
41	The system produces high school plan reports.	High	X						
42	The system reports to students and parents on current student progress.	High	X						
43	The system reports to counselors showing current credit deficiencies by student.	High	X						
44	The system provides tallies of requests in next years plans to assist in master scheduling building.	High	X						
45	The system provides the capability to identify the credit earned for each course in the district-defined transcript.	Low	X						
46	The system provides the capability to place student demographic data in the district-defined transcript.	Low	X						
47	The system provides the capability to customize the header of the district-defined transcript when printing.	Low	X						
48	The system provides the capability to place cumulative attendance data in the district-defined transcript.	Low	X						
49	The system allows the user to place a student's class rank on the district-defined transcript.	Low	X						
50	The system provides the capability to identify the student's grade level at the time the course was taken, in the district-defined transcript.	Low	X						
51	The system provides the capability to identify the teacher name for each course in the district-defined transcript.	Low	X						
52	The system provides the capability to identify the grade earned for each course in the district-defined transcript.	Low	X						
53	The system provides the capability to identify the course section for each course in the district-defined transcript.	Low	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
54	The system provides the capability to identify the course name or abbreviation for each course in the district-defined transcript.	Low	X						
55	The system provides the capability to identify the course number for each course in the district-defined transcript.	Low	X						
56	The system provides the capability to sort courses by user-defined course data criteria in the district-defined transcript.	Low	Partial						PARTIAL - user-defined fields can be added to Course History to sort, but they won't appear on reports.
57	The system provides the capability to sort courses by term as well as by year on the district-defined transcript.	Low	X						
58	The system provides the capability to sort by subject area (e.g. Math, Science,) in the district-defined transcript.	Low	X						
59	The system provides the capability to identify total credit earned by subject area in the district-defined transcript.	Low	X						
60	The system provides the capability to identify total credit earned in the district-defined transcript.	Low	X						
61	The system provides the capability to identify entry and withdrawal information in the district-defined transcript.	Low	X						
62	The system allows the user to enter and override a calculated GPA for an individual student on the district-defined transcript.	Low	X						
63	The system allows the user to enter and override credit awarded for an individual student on the district-defined transcript.	Low	X						
64	The system allows the user to place any GPAs calculated in the grade reporting module on the district-defined transcript.	Low	X						
65	The system provides the ability to place multiple grade legends in the district-defined transcript.	Low	X						A single grade legend may be added.
66	The system allows the user to place student-specific honors and awards identified in the activities module, into the district-defined transcript.	Low	X						
67	The system allows user-defined selections of immunization data to be defined in the district-defined transcript.	Low	X						
68	The system provides the capability to place general notes or comments in the district-defined transcript.	Low	X						
69	The system provides the capability to place current grade data and schedule in the district-defined transcript.	Low	X						
70	The system provides the capability to place the name of the prior school where a course was completed in the district-defined transcript.	Low	X						
71	The system provides a standard district-defined transcript which allows user-defined sort features.	Low	X						
72	The system provides the capability to identify the term the course was taken in the district-defined transcript.	Low	X						
73	The system provides the capability for user-defined selections of standardized test data in the district-defined transcript.	Low	X						
74	The system provides the capability to export transcript data in an electronic format.	High	X						
75	The system allows for the storage and reporting of the "Year" which indicates the year the student completed the course.	High	X						
76	The system provides the ability for grade information to be available by year for printing on transcripts.	High	X						
77	The system allows, optionally, for withdrawn classes to print on the transcript.	High	X						
78	The system supports the transcript displaying current attempted and cumulative attempted credits, as well as, current earned credits and cumulative earned credits.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Transcripts Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
79	The system maintains transcript records including grades and credits for courses taken in and out of the district.	High	X						
80	The system provides the ability for approved personnel to modify grades and transcripts (for an active student. The student's current school is the keeper for the student record and for an inactive student, the student's most recently attended school is the keeper of the student record).	High	X						
81	The system provides the ability to print comments and user defined fields on the district-defined transcript.	High	X						
82	The system provides the ability for when grade and credit changes are made, the student's GPA is automatically recalculated.	High	X						
83	The system has the ability to print test cores on the district-defined transcripts.	High	X						
84	The system has the capacity and capability to store all transcripts for an indefinite period of time.	High	X						
85	The system provides the ability to print electronic transcripts with seal and signature as well as unofficial transcripts.	High	X						
86	The system provides the ability to print progress reports, report cards, and transcripts on a laser printer with a forms overlay to optionally include a logo.	High	X						
87	The system supports printing numerous grade point averages on report cards and transcripts, both cumulative and current, weighted and non-weighted.	Low	X						
88	Cumulative GPA's is displayed and printed on transcripts by year and by school along with gpa points and credits earned and attempted.	High	X						
89	The system provides the ability for grades to automatically post to student historical and transcript files.	High	X						
90	The system identifies courses taken during the summer sessions.	High	X						
91	The system provides the ability to track the teachers associated with each course in transcript course history.	High	X						
92	The system, optionally prints transcript by department instead of school year.	High	X						
93	The system provides the ability to view and print unofficial middle school transcript.	High	X						
94	The system provides easy access to all prior years grades, interim marks and assessment data.	High	X						
95	The system provides attendance information for each year with the information containing the school, marking period, grade level, and the total excused and unexcused absences.	High	X						
96	The system provides grade information by year, by school attended and for each marking period displays the course section, grade, earned credits, comment code and if credits were adjusted and why.	High	X						
97	The system provides the ability to calculate multiple grade point averages and store a minimum of 9 in the student's record for each individual marking period and semester and for a cumulative total.	High	X						
98	The system provides the class rank to be tracked for each cumulative GPA stored.	High	X						
99	For each student, the system provides the ability for a user to be able to view the student's courses, grades, GPAs, and comments in a list form in and in a report card style format.	High	X						
100	The system provides the ability for student GPAs, grades etc. to be viewed on the parent portal and be able to be printed in a report card format.	High	X						
101	For each student, the system provides the ability to easily change and identify a student's credits attempted for a specific class if different than the normal credits.	Medium	X						
102	The system supports the ability to scan historical transcripts, creating a key of student number and name, and provide the ability to reproduce a historical transcript.	High	X						Documents can be scanned and attached.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Graduation Requirements	Priority	Y	C	M	F	3	N	
1	The system tracks a Graduation Requirements Year for each student.	High	X						
2	The student's graduation Requirement years links to a set of Graduation Requirements.	High	X						
3	These Graduation Requirements consist of credits for courses, assessments, and other course and non-course related district requirements.	High	X						
4	The system will display whether or not a student meets the Graduation Requirement as defined for their Graduation Requirements Year.	High	X						
5	The process that determines a student's status towards Graduation Requirements uses a best-fit algorithm to determine which course to apply towards which requirement.	High	X						
6	The system tracks a Projected Graduation Year for each student.	High	X						
7	The system tracks whether a student has graduated.	High	X						
8	The system allows for a particular Graduation Requirement to be waived for a select student.	High	X						Through the use of the "Waivers" tab of the Student Course History module.
9	The system tracks multiple graduation plans for a student and identifies deficiencies in each one.	High	X						Student Career Plans map to a graduation requirement and allow for students and counselors to roadmap the students' school careers – courses taken, extra-curricular activities, etc. – to meet the graduation requirement. They can also record a student's skills and interests, and store any documents relating to their career plan.
10	The system allows one course to be associated or be a requirement for one area within a specific graduation plan, and that same course may meet a different requirement for another graduation plan.	High	X						
11	The system supports a district-defined Graduation Requirement code that identifies which set of requirements this student must fulfill to graduate.	High	X						
12	The system has the ability for graduation status to be determined based on course requests for the upcoming school year(s).	High	X						Parents and students can update both regular course requests and alternate requests via the student and parent portals.
13	The system has the ability for current classes to be included or excluded when computing the potential number of credits earned.	High	X						
14	The system has the ability to analyze a student's course history based on different graduation rules/requirements.	High	X						
15	The system allows credits earned in a course to be automatically applied to a defined alternate area of study when all credit requirements for the primary area of study have been met.	High	X						
16	The system has the ability to assess students based on marks other than letter grades.	High	X						Districts can setup unlimited grading score types for use across the district – teachers can create their own score types as well. Districts/teachers can also setup unlimited grade descriptors – these can be defined to assign a point value or penalty percentage, if desired.
17	Graduation verification can be performed on-line for individual students.	High	X						
18	The system has the ability to display and print a student's progress towards graduation, including the number of credits required, earned and needed in each area of study.	High	X						
19	The system provides a batch process for both individual students as well as selected groups of students to determine graduation status.	High	X						
20	The system has the ability for individual users to include or exclude course history information from the on-line graduation verification display as well as from the batch report output.	High	X						
21	The graduation verification process can assess student graduation plans, compare them to various Graduation Rules, and indicate deficiencies.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Graduation Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
22	The system allows graduation requirements to be met in middle school. They can be included in the definition of Graduation Rules and considered when assessing a student's progress toward graduation.	High	X						
23	The system has the ability to automatically create course requests for all requirements not yet met, based on a student's graduation plan.	Medium	X						
24	The system provides a list of graduation requirements for each student that may be sorted alphabetically, by grade level, by Graduation Requirements Year value, or by Project Graduation Requirements Year.	High	X						Using SIREN or Query
25	The system provides a list of students that includes credits required, earned and needed by area of study for selected grade levels, graduation requirements, etc.	High	X						Using SIREN or Query
26	The system provides a list of students who will not graduate that includes a complete list of the graduation requirements each student has not met.	High	X						Using SIREN or Query
27	The system provides a list of students who have not met all graduation requirements sorted alphabetically within the requirements they have not met.	High	X						Using SIREN or Query
28	The system provides access to and report credits earned/required by curriculum area by grade level for various sets of graduation requirements.	High	X						
29	The system supports different graduation requirement criteria.	High	X						
30	The system provides the ability for all types of graduation plans to be defined, including the required courses for each plan based on year of graduation.	High	X						
31	The system allows the district to enter new graduation requirements for incoming freshman without affecting students in other grade levels.	High	X						
32	The system allows for subject areas, which define graduation requirements, to be assigned to courses on an individual basis.	High	X						
33	The system allows a course to meet the graduation requirements for any number of subject areas. And in some cases, one course may fulfill the requirements of multiple areas of study.	High	X						
34	The system allows graduation status/deficiency reporting based on currently scheduled classes and course histories.	High	X						
35	The system provides a graduation requirements report, which helps determine a student's progress towards graduation.	High	X						
36	The system supports verifies that credits are achieved in order to fulfill graduation or promotion requirement.	High	X						
37	The system should support a quick analysis to which students are/are not on track to graduate on time.	High	X						
38	The system provides the ability to create a personal graduation plan.	High	X						
39	The system automatically adds the graduation plan code and graduation date at the end of each year.	High	X						
40	The system provides a report, both pdf and excel-ready, that lists the student, the Graduation Requirement category (including both courses and assessments), the student's status towards meeting that Graduation Requirement, the number of credits required and the number of credits the student has earned.	High	X						
41	The system allows for teacher-entry of student progress towards Graduation Requirement categories as appropriate. Specifically this would include teacher entry of Culminating Project, High school Plan and Beyond status and similar.	High						X	This could be accomplished with customization. More information is needed to scope and quote.
42	The system allows for cross-crediting of courses. Cross crediting of course implies the student earns high school credit, and the course counts for more than one graduation credit category. For example, a student successfully completes one credit of a course; the student earns one high school credit that satisfies two credits worth of Graduation Requirements.	High	X						
43	The system allows for tracking multiple graduation requirement paths: for example an academic path or a vocational technical path.		X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Graduation Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
44	The system allows for graduation requirements based upon completion of a vocational pathway, and/or a specific number of Advanced Placement courses.		X						Through Career Planning.
45	The system provides a diploma summary screen that includes all additional graduation requirements, all on the same screen, including both current and potential credit displays.		X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Special Program Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to enroll students in any type of program the district offers.	High	X						
2	The system provides the ability for the district to establish a code table defining programs offered by the district, and this code table can be cross-walked to a state equivalent code table.	High	X						
3	The system provides the ability to record the manner by which information about a student's potential need for special services was gathered. (e.g. education assessment, health assessment/screening, special education assessment/evaluation, staff refer	High	X						
4	The system provides the ability for the district to establish a code table defining identification procedure codes.	High	X						
5	The system provides the ability to record information gathered by a qualified evaluator about an individual's need for a special program/service.	High	X						
6	The system provides the ability for the district to establish a code table defining a student's special needs.	High	X						
7	The system provides the ability to record whether an individual is eligible to participate in a special program or receive support services.	High	X						
8	The system provides the ability for the district to establish a code table defining a student's Participation Eligibility Indicator.	High	X						
9	The system provides the ability to record the name of the individual or organization making the referral.	High	X						
10	The system provides the ability to record the reason that a student needs special or supplemental services. (e.g. academic difficulty, academic excellence/enrichment, language difficulty, etc)	High	X						
11	The system provides the ability for the district to establish a code table defining program participation reasons for use by the schools.	High	X						
12	The system provides the ability to record the month, day, and year on which a student is identified as being eligible to participate in special programs or to receive support services.	High	X						
13	The system provides the ability to record the month, day, and year on which a student begins to participate in a special program.	High	X						
14	The system provides the ability for the district to establish a code table defining program providers.	High	X						
15	The system provides the ability to record the site or setting in which a child receives his or her services.	High	X						Through the use of user defined fields.
16	The system provides the ability to record the type of organizational sponsorship of the program.	Medium	X						
17	The system provides the ability for the district to establish a code table defining program sponsors.	Medium	X						
18	The system provides the ability to record the primary method by which funds are generated in order to support a program.	Medium	X						
19	The system provides the ability for the district to establish a code table defining program funding sources.	Medium	X						
20	The system provides the ability to record a narrative description of the services provided to a student enrolled in a program.	High	X						Through the use of user defined fields.
21	The system provides the ability for the district to establish a code table defining program services.	High	X						
22	The system provides the ability to record the number of minutes per week of service the student is receiving.	High	X						
23	The system provides the ability to record the name of the individual or organization providing the specific service.	High	X						Through the use of user defined fields.
24	The system provides the ability to record the month, day, and year on which a student began participation in the program service.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Special Program Requirements	Priority	Y	C	M	F	3	N	
25	The system provides the ability to record the month, day, and year on which a student last participated in or received the program service.	High	X						
26	The system provides the ability to record the manner by which information about a student's participation and progress was gathered.	High	X						Through the use of user defined fields.
27	The system provides the ability for the district to establish a code table defining program monitoring/evaluation methods.	High	X						
28	The system provides the ability to record further information or comments about the student's participation and/or progress in special programs.	High	X						
29	The system provides the ability to record the reason a student is no longer being served by a special program.	High	X						
30	The system provides the ability for the district to establish a code table defining program exit reasons, and the system provides a cross-walk to a state equivalent code table.	High	X						
31	The system provides the ability to record the month, day, and year on which a student last participated in the program.	High	X						
32	The system needs to provide the facility to map the codes in the special program tables to state and federal equivalencies.	High	X						
33	The system provides the ability to calculate unduplicated total student counts	High	X						
34	The system automatically records any changes by type of change, the date, and by whom for each special program record.	High	X						
35	The system should allow for unlimited multiple occurrences of special program enrollment activity associated with each student.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Special Education Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system allows tracking of students who are not attending (or only attending part-time) in the school district but who are receiving special education services from the school district.	High	X						
2	The system provides calendaring functions and calendars integrate with Microsoft Exchange.	High				X			Synergy users will be able to use the integrated calendar to schedule and document services and schedule meetings. Early 2014 release (9.0).
3	The system provides an audit trail for data updates and reports on systems usage.	High	X						
4	The system provides integration with attendance systems to display attendance data and history where appropriate in the special education demographic information or related screens.	High	X						
5	The system allows specified users to change processes due to changes in city/state/federal regulations.	High	X						
6	The system allows the ability to incorporate new IDEA changes as per relevant regulations.	High	X						
7	System provides search capabilities to review summary level information for any student in this system.	High	X						
8	The system provides all special education report requirements for state and federal reporting including appropriate enrollment reporting reports to include the P223H, Special Education Students Suspended/Expelled and Timeline for Initial Evaluation of Special Education and Transition from Part C to Part B by Child's 3rd Birthday reports.	High	X						
9	The system provides the capability of maintaining historical data.	High	X						
10	The system provides the capability to add and maintain new school sites.	High	X						
11	The system allows users to select multiple students based on queries and then perform work flow or status updates on the selected list of students.	High	X						
12	The system provides personalization features that allows each user to view their current case load.	Low	X						
13	System provides a complete history of all who access student info between various processes and functions.	High	X						
14	The system allows for the importing and exporting of Student Information and Special Education data.	High	X						
15	The system provides the ability to initiate, track, and print all documents related to an individual student.	High	X						
16	The system provides standard and user defined data types to support compliance reporting.	High	X						
17	The system provides an ad hoc query tool.	High	X						
18	The system provides the capability of selecting and printing multiple reports at one time.	High	X						
19	The system allows users to create, modify, execute, preview, and save queries.	High	X						
20	System provides report editors for Districts to change report designs based on changes in State or Federal reporting design/standards.	High	X						
21	The system allows for tracking of the Initial Referral Date to special education and the date of signed Consent for Evaluation.	High	X						
22	The system allows approved evaluators access to pertinent student information (security).	High	X						
23	The system provides configurable forms for entering and tracking preschool referrals for special education services.	High	X						
24	The system allows the tracking of critical dates of Intervention meetings.	Low	X						
25	The system allows reporting on intervention history during referral processing.	Low	X						
26	The system allows the tracking of the Eligibility Type (Initial, Reevaluation, Waiver or Transfer).	High	X						
27	The system allows for the tracking of the Eligibility Meeting Date.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Special Education Requirements	Priority	Y	C	M	F	3	N	
28	The system provides the capability of entering the Eligibility Decision (IDEA, Ineligible, Section 504, Evaluation Terminated or Revoke Consent).	High	X						
29	The system allows the input of an Evaluation Extension code.	High	X						
30	The system allows the input of a Case Manager.	High	X						
31	The system allows the ability to record a student's primary State disability code.	High	X						
32	The system allows the input of an IEP Start and End Date.	High	X						
33	The system allow for the input of an IEP Meeting Date.	High	X						
34	The system allows for the tracking of Parent Consent for Initial Services.	High	X						
35	The system allows for the input of a state defined LRE code.	High	X						
36	The system allows for the creation of imbedded instructions and/or tutorials.	High	X						Synergy allows for the creation of imbedded instructions or tutorials through the use of tools such as RoboHelp, etc. (not included in this proposal).
37	The system allows for tracking of Special Education notifications and dates.	High	X						
38	The system provides user defined fields with user defined codes.	High	X						
39	The system provides the capability of log in information which is linked to SIS system. Same username and password. Single login preferred.	High	X						
40	The system provides the ability of controlling whether IEPs can be altered once completed. Administrator can re-open an IEP.	High	X						
41	The system provides a record of all schools, settings in which the student has been placed throughout his/her pre-K and school age history in special education.	High	X						
42	The system allows reporting on the student's current attend location.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Behavior Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides all of the state required data that should be included in the information entered by a school when reporting an incident: school year, building, incident number, offense code , the date, time, location , reported by, reported to, weapon type (if applicable), and narrative text to describe incident details. There should also be the option to enter police contact information such as date, time , investigator type, investigator name, badge and name of police department. Attached to this incident should be all offenders, victims and witnesses with the actions taken and parent/guardians contacted.	High	X						
2	The system allows district-specific fields to be defined for storing additional data about incidents, offenders, offender actions, victims, victim actions, and witnesses.	High	X						
3	The student discipline module must allow the school and district to standardize its approach to categorizing infractions and the disposition for different levels of an infraction.	High	X						
4	The system provides a for searching for groups of students. Users should be able to search for students by ID, name, type of infraction, re-admission date, disposition date, disposition code, compliance status and teacher reporting or monitoring the incident.	High	X						
5	The system provides a view where the administrators see all of the information on a student's discipline at one time.	High	X						
6	The system provides a display all offenses associated with an incident when viewing the student profile.	Medium	X						
7	The system should have the ability to view discipline information for a range of dates (current and previous years) for any combination of schools.	High	X						
8	The system includes a report of detailed discipline incidents with all incident information by school, student, infraction, disposition, action type, infraction teacher, and disposition teacher.	High	X						
9	The system includes a report of infraction statistics .	High						X	This could be done with a custom report. More information is needed to scope and quote.
10	The system includes a report of disposition statistics.	High						X	This could be done with a custom report. More information is needed to scope and quote.
11	The system includes a report of discipline letters to address by range of disposition codes, disposition starting and ending date, infraction codes and their respective starting and ending dates.	High	X						
12	The system is incident driven with each incident allowing multiple offenders, witnesses, and/or victims.	High	X						
13	The security system ensures that only authorized school district personnel can access this highly confidential information. Building access restrictions provide security against unauthorized inquiry or changes to student and/or incident records.	High	X						
14	The system allows a discipline entry to be initiated by student name or student ID.	High	X						
15	The system prompts the user to add an offender, victim, and / or witness when entering an incident.	High	X						
16	The system provides an automatic generation of incident tracking numbers at a district level.	High	X						
17	If the student is special education, the system will notify the person entering the incident when the student has a designated number of days of out of school suspensions.	High	X						
18	The system displays special education or 504 designations regarding the student when entering an action item.	High	X						
19	The system allows multiple occurrences of any action to be assigned to an offender and allow these actions to be scheduled.	Medium	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Behavior Records Requirements	Priority	Y	C	M	F	3	N	
20	The system provides a consistent means of tracking the final result of the offender's action.	High	X						
21	For each Offender's Action, the system allows the user to specify the length of actual duration if it differs from the original assigned length of time and the reason why the action time was shortened.	High	X						
22	For each Offender's Action, the system allows the user to specify the duration of the action assigned	High	X						
23	The system is capable of storing and displaying information about each Offender's Action (e.g. action number, action code, action building, duration scheduled, duration actual, duration reason, disposition code, occurrences total, and occurrences outstanding).	High	X						
24	The system is capable of entering the scheduled and actual dates / times for the actions assigned to the student. This includes allowing multiple occurrences for a single action.	High	X						
25	The system is capable of automatically generating an email to the parents / guardians when a discipline event occurs.	High	X						
26	The system prompts the user to add actions when an Offender has been added.	High	X						
27	The system provides a user-friendly means of obtaining further details regarding individuals involved in the incident, guardians, district-defined information, additional code information, and duration information.	High	X						
28	The system is capable of automatically generating different notification letters and emails for parents or guardians when a student accumulates a certain number of actions and/or offenses.	High	X						
29	The system is capable of generating discipline letters and emails to multiple parents and/or guardians.	High	X						
30	The system is capable of generating discipline letters in multiple languages.	High	X						
31	The system provides the ability to generate a campus report that includes incident information (e.g. offenders, victims, witnesses) based on the building and classroom in which the incident is associated.	High	X						
32	The system is capable of producing a report that provides the total number of incidents by incident type per month and the average number of incidents per day for the incident type. The report includes a total and daily average for a building and for all buildings included in the report.	High	X						
33	The system allows campuses to produce a report that lists the students who are assigned to serve disciplinary actions each day within a specified date range.	High	X						
34	The system supports the ability to track discipline infractions other than those required by the state department of education.	High	X						
35	The system allows the teacher to be able to create an electronic referral that can be completed by an administrator to generate a Discipline Incident in the Discipline System.	High	X						
36	The system creates an email notification sent to the appropriate administrator whenever a teacher referral has been sent.	Medium	X						
37	A teacher can generate e-mail to parents/guardians whenever classroom discipline events occur.	High	X						
38	The system has a display of all students who have been reported as victims and a victim report by school and by student to aid counselors in helping students.	High	X						
39	The system tracks minor incidents that do not need to be entered as formal incidents but need to be tracked for number of occurrences. A report of these notes (minor incidents) for an individual should be available for printing.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Behavior Records Requirements	Priority	Y	C	M	F	3	N	
40	The system has a report of all special education students with incidents for a specific date range.	High	X						
41	The system allows for multiple offenders to be attached to an incident and different actions to be assigned to each offender.	High	X						
42	The system allows for multiple actions (disciplinary measures) to be assigned to an offender for a specific incident and all actions must be recorded and displayed when viewing the student profile and in reports. The information that should be recorded for each incident are: action type, date action (disciplinary measure) begins, number of days of the action with the end date automatically calculated by the system and who assigned the action(s).	High	X						
43	The system displays guardian/parent information when entering an incident to indicate as to when the parent/guardian was contacted, the date and time and the type of contact made (phone, email, letter, etc.).	High	X						
44	The system must generate an incident report for building administrators that includes the information needed for their end of the year NCLB reports.	High	X						
45	The system requires the entry of a weapon type, if a particular offense code is entered.	High	X						
46	For each action type entered in the system codes, there must be an indicator if this action when assigned should be calculate the end date of the action based on calendar days or school days.	High	X						
47	The system codes for Offense types and Action types must have a mapping to state codes.	High	X						
48	The system should automatically create an in-school-suspension list for the day by school to be used by the in-school suspension supervisor.	High	X						
49	The system can produce a report of the number of offenses sorted by the "reported by" person with drill down capability to see specific incidents.	High						X	This could be done with a custom report. More information is needed to scope and quote.
50	The system can produce a report of the number of offenses by team for a specific date range. The report would include date, type of offense and action taken and duration of action.	High						X	This could be done with a custom report. More information is needed to scope and quote.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to store: physician/health provider name.	Low	X						
2	The system provides the ability to store: physician/health provider address.	Low	X						Can be added as a user-defined field or in comments.
3	The system provides the ability to store: physician/health provider phone number.	Low	X						
4	The system provides the ability to store: preferred hospital.	Low	X						Can be added as a user-defined field or in comments.
5	The system provides the ability to store: dentist name.	Low	X						
6	The system provides the ability to store: dentist address.	Low	X						Can be added as a user-defined field or in comments.
7	The system provides the ability to store: dentist phone number.	Low	X						
8	The system provides the ability to store: health insurance company.	Medium	X						Can be added as a user-defined field or in comments.
9	The system provides the ability to store: health insurance plan #.	Low	X						Can be added as a user-defined field or in comments.
10	The system provides the ability to store: health insurance coverage status (yes or no for have health insurance).	Low	X						
11	The system provides the ability to store: school insurance status (yes or no).	Low	X						Can be added as a user-defined field or in comments.
12	The system has the ability to record multiple health concerns for each student.	High	X						
13	The system allows for District table driven health concern codes and descriptions.	High	X						
14	The system provides the ability to store Health Concern date recorded.	High	X						
15	The system provides the ability to store Health Concern narrative comments.	High	X						
16	The system provides the ability to store Health Concern severity flag for medical alert (including life threatening).	High	X						
17	The system provides the ability to store Health Concern confidentiality level code.	High	X						
18	The system provides the ability to record date of last physical exam.	Medium	X						
19	The Growth screen includes the student's height, weight, calculated percentile, and BMI.	Low	X						Partial - BMI is calculated but not height/weight percentile.
20	The system automatically pulls the student's growth percentile from the percentile table using the student's age as of the date of the exam. The percentile table includes ages up to 21.	Low						X	
21	Produces Growth Chart in graph format. The growth chart can be produced in a printable format. This not an immediate requirement.	Low						X	
22	Produces a Growth Chart report that prints the student's height and weight, percentile, and BMI as recorded on the Growth screen. This not an immediate requirement.	Low						X	
23	The system allows tracking of Blood Pressure and other health concerns as needed.	Low	X						
24	The system provides the ability to enter immunization dates for all ACIP recommended immunizations.	High	X						
25	The system provides the ability of district to add/edit immunization fields.	High	X						
26	The system provides the ability to select and simultaneously enter several immunizations given on the same date.	Medium	X						
27	The system provides the ability to enter immunization waivers (date, type, expiration date) with district generated list of waiver type.	High	X						
28	The system provides the ability to calculate and report immunizations that are compliant, not compliant, conditional or waived.	High	X						
29	The system provides the ability to calculate compliance by day (not month) including the WA 4 day grace period based on the WA state list of required immunizations.	High	X						
30	The system provides the ability to calculate compliance comparing different series (ex MMR and Varicella if not given on the same date must be min of 28 days apart with no 4 day grace period allowed).	High	X						
31	The system provides the ability to automatically calculate compliance based on both grade and age (ex Tdap required if in grade 6 and 11 years old).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
32	The system provides the ability of the district to set immunization requirements based on both grade and age.	High	X						
33	The system provides the ability to calculate a series as in conditional status for the first 30 days after the next immunization in a required series becomes due and as out of compliance after 31 days.	High	X						
34	The system provides the ability to generate user defined immunization compliance reports for individual students or selected groups of students by school, grade, immunization series, compliance status of individual series and overall status (including waivers).	High	X						
35	The system provides the ability of the district to edit priority of overall status options	High	X						
36	The system provides the ability to generate district form letters for students who are out of compliance or conditional status, and mailing labels for the same	Medium	X						A report can be mail merged, and the district can use SIREN to create reports that exactly mimic the look of the required form letters.
37	The system provides the ability to provide immunization data to the Washington State Department of Health State for required annual reporting.	High	X						
38	The system provides the ability to share data with the WA State Immunization data base.	Medium	X						
39	The system provides the ability to record multiple immunizations/vaccinations.	High	X						
40	The system allows for District table driven immunization/vaccination codes and descriptions meeting Washington state requirements.	High	X						
41	The system allows for noting a student is immune to a vaccination.		X						Can be added as a user-defined field or in comments.
42	The system provides a waiver/exemption may be recorded for each immunization/vaccination.	High	X						
43	The system provides a waiver/exemption date may be recorded.	High	X						
44	The system allows for District table driven (status) reason codes and descriptions for waivers/exemptions.	High	X						
45	The system provides narrative comments to be tracked for waivers/exemptions.	High	X						
46	The system generated compliance report/displays have an option to include or exclude students with waivers/exemptions.	High	X						
47	The system provides the ability to automatically re-calculate a student's compliance status for a change in birthdate.	High	X						
48	The system provides the ability to automatically re-calculate a student's compliance status for a change in grade level.	High	X						
49	The system allows for compliance checking by grade level (students in one grade level may have different immunization requirements than students in another grade level).	High	X						
50	The system provides susceptibility reports(I.e., all students not immunized, including students with waivers/exemptions).	High	X						
51	The system has the ability to run report for multiple diseases.	High	X						
52	The system provides the ability to run report for district or for specific school(s).	High	X						
53	The system provides the ability to select creation (or omission) of form letters for those deemed susceptible.	High	X						
54	The system provides a report of students who require medication	High	X						
55	The system provides a report of exemption	High	X						
56	The system provides a report of immunization list	High	X						
57	The system provides a report of students missing immunization list	High	X						
58	The system provides a report of health and physical examination list	High	X						
59	The system provides a report of summary of the student's health and medical data	High	X						
60	The system provides a report of sports participation	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
61	The system automatically calculates immunization compliance on-screen based on specific state requirements to determine which students are not up-to-date and which ones are complete. System must be easily configurable to make changes in State requirements. Should also have free text field for notes.	High	X						
62	Immunization criteria can be configured to meet individual district requirements, using student's age, grade, date of birth, grade period date, etc.	High	X						
63	The system supports Immunization schedules, as defined by the CDC and the Department of State Health Services), will be preloaded when the system is installed and updated by the company as changes occur.	High	X						
64	The authorized user may check selected groups of students to check for immunization compliance. The user may select which series and which schedule should be used.	High	X						
65	The system allows multiple requirement schedules to be set up for the same immunization series for when there are different requirements at different ages, such as more stringent requirements for younger students.	High	X						
66	The system is capable of maintaining immunization schedules for both minimum and recommended requirements. The recommended schedule should include doses at specified ages, for students who started immunizations on time. The minimum schedule should identify the minimum time intervals needed between doses, for students who started their immunizations late.	High	X						
67	The system allows an alternate dose that can be defined to can count toward satisfying a series requirement.	High	X						
68	In order to satisfy immunization requirements, a shot can be counted toward more than one series, or it may be tracked as part of one series, but it may also be counted as a series itself.	High	X						
69	The system tracks religious and medical exemptions.	High	X						
70	The system allows additional information to be entered for each shot such as referral information, follow-ups, free text area, etc.	High	X						
71	The system allows letters to parents/guardians to be generated for students with immunization delinquencies. A report listing these students and their delinquencies will also be provided.	High	X						
72	The system has the ability to print immunization notice letters to the parent with a current copy of the complete immunization record on file and available resources to obtain immunizations needed.	High	X						
73	The system has the ability to view and print complete immunization records for each student.	High	X						
74	The system provides the ability to enter yes/no to flag a student with a Life-Threatening Condition.	High	X						
75	The system provides the ability to name the Life-Threatening condition from a district created list.	High	X						
76	The system provides the ability to enter free text Life-Threatening condition information if "other" is selected from the district list.	High	X						
77	The system provides the ability to select more then one Life-Threatening Condition.	High	X						
78	The system provides the ability to generate and print on demand (by nurses, administrators and teachers) a district produced Emergency Care Plan correlating with the Life-Threatening condition/s specified.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
79	The system provides the ability to prominently flag a student with a Life-Threatening condition for both office users and teachers assigned to the student.	High	X						
80	Allow nurses to enter free text onto the Emergency Care Plan.	High	X						
81	The system provides the ability to print the Life-Threatening Alert flag on other reports (ex locator cards, teacher class lists etc).	High						X	This could be provided with customization. More information is needed to fully scope and quote.
82	The system provides the ability to print a list of students with life-threatening conditions with the name of the condition and student picture with sort options (name, class, homeroom, grade)	High						X	This could be provided with customization. More information is needed to fully scope and quote.
83	The system provides the ability to enter health conditions from a district generated list	High	X						
84	The system provides the ability to enter free text detail of the specified health condition	High	X						
85	The system provides the ability to enter edit date	High	X						
86	The system provides the ability to restrict access of health condition data to protect confidentiality	High	X						
87	The system provides the ability to generate health condition reports by user selected data with student specific data (ex students with Asthma) or general information (ex number of students with selected health condition)	High	X						
88	The system provides the ability to communicate with the Health Department the numbers of students with selected health conditions while not providing student name or other identifying information.	Medium	X						
89	The system provides the ability to enter hearing and vision screening results from a district generated list (pass/fail etc) for both initial screen and re-screens if needed.	High	X						
90	The system provides the ability to enter data on multiple students at a time (ex create records for a whole class or grade).	High	X						
91	The system provides the ability to enter details of screening from a district generated list (ex R-20/20 L-20/20).	High	X						
92	The system provides the ability to enter free text if detail selected is "other".	High	X						
93	The system provides the ability to enter a date of referral for further evaluation.	High	X						
94	The system provides the ability to generate a district provided referral letter (with mailing labels) for students with user selected screening results.	High	X						Through mail merge capability.
95	The system provides the ability to generate user defined (student, screening type, result, date, homeroom teacher) report of screening results.	High	X						
96	The system provides the ability to enter student visits to the Health Room including; date, time in, time out, reason for visit (from a district generated drop down list), free text detail field with no character limit, disposition (from a district generated drop-down list).	High	X						
97	The system provides the ability to enter staff visits to the Health Room including; date, time in, time out, reason for visit (from a district generated drop down list), free text detail field with no character limit, disposition (from a district generated drop-down list).	Medium	X						
98	The system provides the ability to select several items from district generated list of common treatment options.	Medium	X						
99	The system provides the ability to note if parent was called or message was left, including who was called and time.	Medium	X						
100	The system provides the ability to note multiple calls.	Medium	X						
101	The system provides the ability to see student Emergency Contact information without leaving the Nurses Health Room Log page.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
102	The system provides the ability to place a call or e-mail directly from the Emergency Contact information.	Medium						X	
103	The system provides the ability to enter several students into the Health Room Log on the same page.	High	X						
104	The system provides the ability to auto save data.	High						X	This could be provided with customization. More information is needed to fully scope and quote.
105	The system provides the ability to edit all data fields after saving.	High	X						
106	When entering nurses visits/logs allow partial entry of student name without the need of a wildcard. System should facilitate smarter searches.	High	X						
107	The system provides the ability to easily view prior visit Health Room Visits of a student.	High	X						
108	The system provides the ability to see a students medical conditions, medications and alerts while in the Health Room Log area.	High	X						
109	The system provides the ability to create another document (Head Bump Report, Notice of Health Room Visit etc.) from a Health Room Log entry while in the Log and attach it to the log entry.	High	X						
110	The system provides the ability to generate a user defined (student specific or a defined group, date range, reason for visit, disposition) report of health room visits where the user can select either detail or summary data).	High	X						
111	The system provides the ability to generate a report by date with student name and time in, time out for attendance.	High	X						
112	The system provides the ability to communicate with the Health Department the numbers of students visiting the Health Room with selected health conditions while not providing student name or other identifying information.	Medium	X						
113	The system provides the ability to enter medications/treatments/procedures including the name of medication/treatment/procedure, dose, method, frequency, indicate if medication is only as needed, time/s, start and end dates, and free text narrative.	High	X						
114	The system provides the ability to enter different medication doses of the same medication name.	High	X						
115	The system provides the ability to document medication administration for both routine and as needed medication, including time and name of person administering the medication, and free text area.	Medium	X						
116	The system provides the ability to document treatments and procedures (ex tube feeding, catheterization).	Medium	X						
117	The system provides the ability to enter diabetes specific information to include, time, blood glucose measurement, carbohydrates number, amount and type of treatment administered (insulin, glucose tabs, juice etc.), method of administration, and free text for other action taken.	Medium	X						
118	The system provides the ability to generate district supplied paper Medication Administration Records specific to routine or as needed medication.	High	X						
119	The system provides the ability to generate a monthly checklist report of students needing routine medication/treatments/procedures.	High	X						
120	The system provides the ability to generate a report of students with as needed medications with multiple sort options (student name, grade, teacher).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	School Medical Records Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
121	The system provides the ability to generate a district supplied letter (with mailing labels) to parents of students with medications/supplies which need to be picked up at the end of the school year.	Medium	X						A report can be mail merged, and the district can use SIREN to create reports that provide the required information.
122	The system provides the ability to generate a report of medication/treatment/procedure administration with details (dose, time, person etc).	Medium	X						
123	The system provides the ability to select absence reason from a district generated list.	High	X						
124	The system provides the ability to generate attendance reports by user selected data, student specific or identified group, date range, number of absences, percent absence rate, reason for absence/s.	High	X						
125	The system provides the ability to generate a school specific letter to parents of students with high absence rates.	Medium	X						
126	The system provides the ability to communicate with the Health Department the numbers of students absent for selected reasons (illness, flu symptoms etc) while not providing student name or other identifying information.	High	X						
127	The system provides the ability to create 504 accommodation plans, with start and end date, reason for plan, case manager, list of accommodations and free text narrative.	High	X						
128	The system provides the ability to generate report of students with 504 plans.	High	X						
129	The system provides the ability to print the Accommodation plan for a specific student or group of students (nurse, counselor, teacher and administrator).	High	X						
130	The system provides the ability to generate and edit and print a district provided Individual Health Plan (IHP) for a student with a correlating health condition (ex severe allergy IHP for a student with a severe food allergy).	High	X						
131	The system provides the ability to create an IHP from a district provided list of nursing diagnosis, goals, interventions and evaluations.	Medium	X						
132	The system provides the ability to create an IHP using free text entry fields.	Medium	X						
133	The system provides the ability to create extract of students for reports based upon; school, grade, cross-enrolled, teacher, class, life-threatening yes/no, program (special ed, 504, ELL etc).	High	X						Through the use of Query
134	The system provides the ability of the district to edit field labels.	High	X						
135	The system provides the ability to auto save changes.	High						X	This could be provided with customization. More information is needed to fully scope and quote.
136	The system provides the ability of user to easily export user defined data.	High	X						
137	The system provides the ability to create ad hoc reports.	High	X						Through the use of Query and SIREN reporting tools.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Fees Requirements	Priority	Y	C	M	F	3	N	
1	The system has the ability to define fees for users and end users according to categories such as required, optional, course fees, etc.	Low	X						
2	The system provides the option for the District to not include the display of student Fines and Fees within the application.	High	X						
3	The system provides the ability to make all Fines and Fees be display only - no data changes are available.	High	X						
4	The system allows for the import of all Fines and Fees information from an external data source.	High	X						
5	The system has the ability to assign and un-assign fees in mass by grade, team, course or individually as appropriate.	Low	Partial						Fees can currently be mass assigned by grade, course, individual students or gender. Synergy does not currently assign fees by teams or groups.
6	The system has the ability to quickly show the detail descriptions of the fees to users on the same screen where fees are displayed, e.g., use of pop up windows or notification.	Low	X						
7	The system allows users to be granted access to add, remove, and accept payments for fees for one or many activities for a specific building.	Low	X						
8	The system allows users to be granted access to add, remove, and accept payments for fees for one or many buildings.	Low	X						
9	The system allows users access to add, remove, and accept payments for own building, but to read or view fees and payments in other buildings. Fee information is tied to the student and not the building.	Low	X						
10	The system allows print and maintain student invoices and fees due correspondence of all fees owed by a student with a date range option.	Low	X						
11	The system has the ability to maintain student invoices and correspondences for fees due for students who have withdrawn or transferred to another school within the district. The system keeps a history of paid and due fees.	Low	X						
12	The system has the ability to generate a balancing report to show debits against credits per school.	Low	X						
13	Fees and payments can be imported/exported to/from other systems, e.g. financial system, library system, food service, etc. The system has the ability to easily upload fee information into accounting systems.	Low	X						
14	The system provides a report for users to print at the end of the day that details the payments they accepted and amount of payments they accepted in total and by type (cash, check, etc.).	Low	X						
15	The system provides the ability to add standard fees by activity.	Low	X						
16	The system provides the ability to mass print a report of fees owed by student for mailing.	Low	X						
17	The system provides the ability to see all student fees on one page. The fees include all fees owed for current, next and previous years.	Low	X						
18	The system provides the ability for fees to be paid online. The system is configured to facilitate easy integration with backend payment processing systems.	Low	X						
19	Parents have the ability to see a detailed history of payments online with a drill down capability that provides the detail of what was paid for and what remains due.	Low	X						
20	The system provides the ability to see/apply payments/fees for students moved to different district school or for fees that have been 'archived'.	Low	X						
21	The system has the ability to accept lump sum payments and the ability to prioritize what fees are paid first.	Low	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Fees Requirements	Priority	Y	C	M	F	3	N	
22	The system has a report of fees paid/due by grade level.	Low	X						
23	The system has reports and screens, including receipts, that show refunds as a negative number, possibly in different colors.	Low	X						
24	The system allows the district to define fees that can have partial payments.	Low	X						
25	The system provides an email interface to allow emailing parents a fees due notice by fee or by student or receipt either by mass or by individual parent. This emails to the financially responsible parent. Parents are able to choose to receive via email or regular mail.	Low						X	
26	The system has the ability to track and process fee refunds efficiently. The system has the ability to notify users when refunds are due and to run transaction reports to track the status of refunds, credit card refund, etc.	Low	X						
27	The system provides an easy method for individual schools to add grade level or activity fees for parents online.	Low	X						
28	The system has the ability to generate collection letters for past due fees as defined by the user.	Low	X						
29	The system provides the ability for fees to be paid on payment plan.	Low	X						
30	The system provides the ability to automatically waive fees based on Free and Reduced status.	Low	X						
31	The system provides the ability to pro rate fees based on admission date or admission to class.	Low	X						
32	The system provides the ability to assign a fee or fees individually or in mass by course.	Low	X						
33	The system provides the ability to assign all fees for next year.	Low	X						
34	The system provides the ability to have user defined fees automatically assigned on admission.	Low	X						
35	The system provides the ability for the system to alert bookkeepers when the Free & Reduced status (if waiver has been signed) has changed for a student in their building.	Low	X						
36	The system provides the ability to transfer students between buildings without losing all payment history and the ability to refund if a withdrawal is done before fees are settled.	Low	X						
37	The system provides the ability to indicate which parent/guardian has financial responsibility. The system has the ability to invoice any parties defined by the users.	Low	X						
38	The system provides a simple to use Ad Hoc reporting option so that users can get easy, timely access to fee data. Users including teachers are able to easily query fees for any time period required.	Low	X						
39	The system provides for logging/audit trail to be able to track who made changes/deletions to student data.	Low	X						
40	The system provides fee and payment reports with detailed information (i.e. check number, course refund information, how paid, date paid, etc.).	Low	X						
41	The system has the ability to generate formatted receipts. Users and parents are able to print receipts directly from the system for any payments.	Low	Partial						Users are able to print receipts, but not parents.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Assessments Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to manage information relative to the general classification of an assessment administered to a student.	High	X						
2	The system provides the ability to record the reason for which an assessment is being conducted (e.g.: admission, assessment of student's progress, development of individualized educational program (IEP), development of individualized family service program, etc).	High	X						
3	The system provides the ability for the district to establish a table defining codes and descriptions for the reasons an assessment is being conducted.	High	X						
4	The system provides the ability to record assessment type for each assessment being administered (e.g.: achievement, advanced placement, aptitude, attitudinal, cognitive and perceptual skills, developmental observation, interest inventory, language program, etc).	High	X						
5	The system provides the ability for the district to establish a table defining codes and descriptions for assessment types.	High	X						
6	The system provides the ability to record assessment titles.	High	X						
7	The system provides the ability for the district to establish a table defining codes and descriptions for assessment titles.	High	X						
8	The system provides the ability to record the category of an assessment based on format and content.	High	X						
9	The system provides the ability for the district to establish a table defining codes and descriptions for assessment versions.	High	X						
10	The system provides the ability to record the description of the content or subject area (e.g., arts, mathematics, reading, stenography, or a foreign language) of an assessment.	High	X						
11	The system provides the ability for the district to establish a table defining codes and descriptions for assessment content.	High	X						
12	The system provides the ability to record subtest types.	High	X						
13	The system provides the ability to manage information relating to the administration of an assessment to a student.	High	X						
14	The system provides the ability to record the typical grade level or range of grade levels for which an assessment is designed.	High	X						
15	The system provides the ability to record the grade level of a student when assessed.	High	X						
16	The system provides the ability for the district to establish a table defining codes and descriptions for the grade level of a student when assessed.	High	X						
17	The system provides the ability to record the copyright date of the assessment.	High	X						
18	The system provides the ability for the district to establish a table defining codes and descriptions for copyright dates of each assessment.	High	X						
19	The system provides the ability to record the reason a student did not participate in the assessment.	High	X						
20	The system provides the ability for the district to establish a table defining codes and descriptions for non-participation reasons.	High	X						
21	The system provides the ability to record the primary manner in which a test is administered to a student (e.g. group, individual).	High	X						
22	The system provides the ability for the district to establish a table defining codes and descriptions for administration methods.	High	X						
23	The system provides the ability to record the primary manner in which a test is presented to a student (e.g. computer adaptive test, oral, written).	High	X						
24	The system provides the ability for the district to establish a table defining codes and descriptions for the type of administration form.	High	X						
25	The system provides the ability to record any special variation in the administration of the test (e.g., untimed, use of sign language for hearing impaired, Braille test or large print form for visually impaired, or use of a reader or facilitator for administering the test. etc).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Assessments Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
26	The system provides the ability for the district to establish a table defining codes and descriptions for special accommodations.	High	X						
27	The system provides the ability to record the month, day, and year on which an assessment is administered.	High	X						
28	The system provides the ability to record the description of the place where an assessment is administered.	High	X						
29	The system provides the ability for the district to establish a table defining codes and descriptions for test locations.	High	X						
30	The system provides the ability to record the name of the individual and/or organization administering the assessment.	High	X						
31	The system provides the ability to manage information about assessment results, the manner in which they are presented, and factors which may influence their interpretation.	High	X						
32	The system provides the ability to record classifications of how results of achievement tests are related and interpreted (e.g.: norm-referenced, criterion-referenced, achievement-level reference or benchmarked).	High	X						
33	The system provides the ability for the district to establish a table defining codes and descriptions for assessment reference types.	High	X						
34	The system provides the ability to record the group for which the scores of an assessment have been standardized for use in interpreting the results (e.g.: annual user, equated national, independent school, international, national probability sample).	High	X						
35	The system provides the ability for the district to establish a table defining codes and descriptions for norm groups.	High	X						
36	The system provides the ability to record the year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students.	High	X						
37	The system provides the ability for the district to establish a table defining codes and descriptions for norm years.	High	X						
38	The system provides the ability to record the time of year when the assessment was given to a sample of students for the purpose of establishing a standard of performance for that group of students (e.g., fall, mid-year, or spring).	High	X						
39	The system provides the ability to report the lowest and highest individual scores obtained by a group of students who are in the same norm group.	High	X						
40	The system provides the ability to report the measure in which results are presented (e.g.: age score, grade equivalent or grade-level indicator, normal curve equivalent, normalized standard score, number score, pass-fail, percentage of items correct, etc).	High	X						
41	The system provides the ability for the district to establish a table defining codes and descriptions for reporting methods.	High	X						
42	The system provides the ability to store and report the description of a meaningful raw score or statistical expression of the performance of a student or group of students on an assessment.	High	X						
43	The system provides the ability to store and report the description of unusual testing conditions that must be known to properly interpret an individual's test score (e.g., non-standard administration, special circumstances, experience only, diagnostic only).	High	X						
44	The system has the ability to store and display state Washington Assessment of Student Learning (WASL) tests	High	X						
45	The system has the ability to store complete test history for all students.	High	X						
46	The system has the ability to view individual student test scores.	High	X						
47	The system has the ability to view all tests for a student.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Assessments Requirements	Priority	Y	C	M	F	3	N	
48	The system has the ability to compare test scores for similar tests from year to year for a student.	High	X						
49	The system has the ability to view class room average test scores by homeroom and by period.	High	X						
50	The system has the ability to view test scores for new incoming students to a school.	High	X						
51	The system provides the capability to print bar codes that contain student and school information on the answer sheets for standardized tests. It would also be valuable to have a similar capability that prints "tickets" since those are becoming increasingly necessary for online assessments. Preferably, the system would allow printing of sheets of tickets to the standard Avery templates that have perforated sheets	High	X						Through the use of the SIREN report writing tool.
52	The system provides the capability to pre-slug answer sheets for standardized tests with student identification number, names, gender, grade level, birthdate, special codes, and school number.	High	X						
53	The system should allow any standardized test score data to be printed on a student's transcript.	High	X						
54	The system provides the capability to do comparisons on standardized test scores for a student's entire test score history.	High	X						
55	The system provides the capability to import all test scores from any testing company and OSPI.	High	X						Synergy allows districts to collect, view and analyze student performance on all types of tests, including district assessments and state-mandated tests.
56	The system provides the capability to manually enter all test scores from any testing company.	High	X						
57	The system provides a standard score distribution report that allows the user to display scores by any user-defined test administration criteria including, but not limited to: test, test administration form, test administration date, composite score.	High	X						
58	The system provides a standard report, per student, of multiple test administrations, subtests and corresponding scores.	High	X						Synergy doesn't currently provide a standard report for this but a report can be created using SIREN and saved for use as a standard report.
59	The system provides a standard score distribution report that allows the user to display a selected test administration scores by user-defined student criteria including, but not limited to: grade level, class, ethnicity, and gender.	High	X						Synergy doesn't currently provide a standard report for this but a report can be created using SIREN and saved for use as a standard report.
60	The system computes the number of tests taken for a specified date range.	High						X	
61	The system allows customized export of user-defined test data.	High	X						
62	The system calculates and reports the percentage of test scores that meet user-defined test criteria.	High	X						
63	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires. Some test scores may be historical in nature, but required for reporting. The tests should include but is not limited to standardized test scores such as Washington Assessment of Student Learning (WASL), Measures of Academic Progress (MAP), High School Proficiency Exam (HSPE), End of Course Exams, PSAT, SAT, Smarter Balance, etc.	High	X						
64	For each test given, the system tracks the test, form, level, multiple sub-tests and the number of items in the test that relate to each sub-test.	Low	X						
65	The system allows for standardized tests to be imported from data files supplied by outside sources into the application.	High	X						
66	The system should be able to import raw test data from other sources.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Assessments Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
67	The student's main record must track all the tests taken over time, whether they are standard tests, school tests or district tests.	High	X						
68	For each test tracked, the test name, date it was administered, grade level when taken, school of administration and the score, or scores, must be recorded.	High	X						
69	The test scores recorded must be able to be stored in the formats provided (e.g. .csv, .data)	Low	X						
70	The system provides an item analysis report or display.	High	X						
71	The system provides a student response analysis report.	High	X						
72	The system provides a school summary of responses for any given test.	High	X						
73	The system provides statistical reports that include mean, median, standard variance, standard error, and minimum/maximum scores. should include mode, and standard deviation in addition to variance and a frequency distribution.	High	X						
74	The system maintains an ongoing test and assessment history for each student in the district.	High	X						
75	The system supports national, state and local district-defined test definitions.	High	X						
76	System should be able to support FAFSA forms tracking.	Low	X						
77	The system allows external records, e.g., health records should be able to be attached to a students record within the system.	Medium	X						Users can scan and/or attach an unlimited number of documents to a student record.
78	The system allows test scores to be hand-keyed or may be mass imported from data files and the system provides for easy resolution to identify import errors and correct them.	High	X						
79	The system supports an unlimited number of tests and subtests across all school years for each student.	High	X						
80	The system supports test scores that are either alpha or numeric.	High	X						
81	The system provides for ability to create pre-coding file for state assessments.	Medium							
82	The system provides an efficient method for reporting on testing data for specific groups of students including student's age, grade, building at the time the test was taken and including data from other modules such as Demographics, Special Programs, etc.	High	X						Through Query and SIREN reporting tools.
83	The Test History Report can be run in a variety of ways, allowing users to select which information is included in the report. The user should be able to run the report by test or by student and should be able to include/exclude subtest score information, tracking information, demographic information, etc.	High	X						
84	The system allows all common score type fields including but not limited to: raw score, percentage, % scaled, standard deviation, normed score, number of items correct and local district-defined score types.	High	X						
85	The system provides ability to copy test definitions.	High	X						
86	Allow for user-friendly modifications, for users with the proper security, to test definitions as assessment requirements change or a new test is developed.	High	X						
87	The system provides online access by parents and teachers to test scores.	High	X						
88	The system allows for all test scores to be stored on-line in the database for as long as the school or district desires.	High	X						
89	The system provides the ability to track multiple attempts at the same test.	High	X						
90	The system allows text describing a test and subtest or its administration to be entered.	Medium	X						
91	The authorized user may export data to statistical packages, such as SPSS or SAS, through flat ASCII data files, via the Report Writer.	High	X						
92	The system provides analysis improvement/progression for students and programs. The system should facilitate analysis for a single student, grade, school, cluster, program, or English proficiency category. The system should facilitate analysis by comparing different tests.	High	X						
93	The authorized user may view and maintain the test results by student and by test, including the associated tracking data.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Assessments Requirements	Priority	Y	C	M	F	3	N	
94	When a test is added for a student, the system stores the student's age, grade, and building at the time the test was taken.	High	X						
95	The system supports setting exclusion flags on students who may be excluded from having to pass a course or test.	Low	X						
96	The system allows alternate test flags.	High	X						
97	The system allows test exemptions.	Low	X						
98	The system allows parent waivers.	Low	X						
99	The system allows ability to show test scores for similar tests from year to year for a student.	High	X						
100	The system allows ability to perform cohort group multi-year test history reporting.	High	X						
101	The system provides the ability to create test results by class to send to teachers.	High	X						
102	The system provides the ability to view classroom average test scores.	Medium	X						
103	The system supports tracking test data down to the detailed test question level (for each test question, Track associated objectives, Student Expectations, Answer Key, Student answer, student score, etc.)	Medium	X						
104	The system supports summarized test data down to the Student Expectation level (student progress towards competency of each SE and/or Objective, Student mastery of each test, etc.)	Medium	X						
105	The system allows data mining and advanced OLAP analysis of test score information incorporating user-defined criteria and database elements.	Medium				X			Data analytics is on the Synergy product roadmap but a release date has not yet been determined.
106	All user defined report generation capabilities should be intuitive and easy to use.	High	X						
107	The system provides a mechanism where all assessment reports are downloadable as an Excel file. Users should be able to easily define what columns they want to include in downloaded Excel reports.	High	X						This can be accomplished through Administrative Reports, which allow the district to pre-define reports that teachers, principals or administrators can use, view, sort, group and ultimately print or download to Excel.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides the ability to create look up displays and reports without requiring any programming or code modification by the user.	High	X						
2	The system provides acceptable table values when queried in an on-screen pop-up manner for easy entry and referral.	High	X						
3	The system provides access to context-sensitive help throughout the entire application.	Medium	X						
4	The system provides the ability to select any student table/view in the database.	High	X						
5	The system provides the ability to define reports and subsequently initiate their production.	High	X						
6	The system provides the ability to save user-defined reports.	High	X						
7	The system provides the ability to modify or copy saved user-defined reports.	High	X						
8	The system provides the ability to share with other users, user-defined reports.		X						
9	The system provides the ability to view created reports on-screen, print, save to external media in ASCII/Excel/Access formats or transfer to another software package such as dBase, Lotus, etc.	High	X						
10	The system provides the ability to execute multiple level sorting of report rows by data type.	Medium	X						
11	The system provides the ability to utilize the conditional factors "equal to (=)", "greater than (>)", or "less than (<)" between values and net values to create reports.	Medium	X						
12	The system provides the ability to save to external media the programming language used to create the user-defined report.	Low	X						SIREN reprot writer "packages" can be saved
13	The system includes an end-user tool that is easy to use and powerful in its capabilities. The tool must be totally integrated with the application and the database proposed.	High	X						
14	The system includes a report writer that is graphical not text or script based; SQL alone is not an acceptable method.	High	X						
15	The system provides for context-sensitive help features throughout as well as an online manual.	High	X						
16	The system provides for automatic joining of tables with related data without any programming.	High	X						
17	The system allows users to create look up queries and reports without knowing any programming language.	High	X						
18	The system provides for sorting of rows in multiple orders.	High	X						
19	The system provides for the easy design of mailing labels. The students included should be able to be based on criteria from any field or flag and sorted by any field.	High	X						
20	The system includes reports that are easy to produce and read. All reports must have the option to be printed out on a printer, viewed on the screen (even if it is a wide report) and exported to a file such as word documents, spreadsheets, email, faxes, or transferred to an ASCII format, with fixed-width fields, for loading into another package or tool. Reports can also be produced in a PDF format so they may be viewed via Adobe Acrobat.	High	X						Transferring of data to external software depends on that softwares ability to accept data. We export reports in many formats including Excel, PDF,Txt, Rich txt, CSV, Tiff etc...
21	All reports in the system have extensive flexibility in the order the standard report information appears.	High	X						
22	All reports should have similar front-end questions prior to producing the report.	High	X						
23	The system queries and reports must be able to be produced based on conditions such as =, >, <,>,<=>, in between values, and net values.	High	X						
24	The system allows the search and sort on any and all data fields (ex. name, student ID, grade, bilingual students, etc.)	High	X						
25	The system allows for searching using a combination of criteria (i.e. perform search based on student name AND birth date).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
26	The system allows searching using wild card or partial input (i.e. input XXX% to search for XXXXXXXX).	High	X						
27	The system provides for the selection and grouping of report data by any field with sub-totals and sort orders.	High	X						Yes, via Query and SIREN Report Writer
28	The system allows for user-defined on-screen prompts and selection criteria when generating reports.	Medium	X						
29	The system allows for defining reports that can be run at predefined intervals, or calendar dates in the future.	High	X						
30	The system allows users to save standard report definitions and reprocess those requests for future reporting.	High	X						
31	The system allows a user to be able to utilize a standard report definition that has been defined by another user as long as security access is maintained.	Medium	X						
32	The system prints barcodes and pre-printed forms (e.g. address labels, bubble sheets, student Ids, schedule cards, transcripts etc.).	High	X						Yes, on student ID cards and for addresses on report cards
33	The system includes a data dictionary (i.e. list of fields with definition and data relationships if applicable) that is accessible by the end user in a format that is easily understood by a non-technical person.	High	X						The District owns the Schema, users can add words to an already existing spellcheck dictionary.
34	The system supports printing to a network connected printer, or a locally connected printer.	Medium	X						
35	The system allows for sending reports and documents via email as an integrated component of the system.	High	X						
36	The system support report writing including a variety of standard arithmetic and statistical functions such as sum, average, minimum, midpoint, maximum, percentage, etc.	High	X						Through the SIREN tool, or the optimal Synergy Technology module (ST).
37	The system allows for district-wide or school-specific reports to be generated.	High	X						
38	The system allows the user to be able to print screens, allow the use of printers attached to PC workstations, and allow multiple printer access for all users.	High	X						Multiple printer access to all users is a network function.
39	The system supports distinct levels of security for data mining and reporting can be defined for different levels and types of users throughout the district.	High	X						
40	The system is designed to allow reporting and querying functions as multi-user and these tools do not cause record contention issues for other users.	High	X						
41	The system includes security where only users with the proper security are allowed access to certain protected confidential fields such as the student and teacher social security number, the student state id and prior state id, student economic status, etc.	High	X						
42	The system supports the definition of routing or distribution lists as a part of the report definition. And then documents are sent electronically according to defined routing lists.	Medium	X						
43	The report writer has no user, developer, or license limitations.	High	X						
44	The system allows only authorized users to be able to define reports and initiate their production.	High	X						Through the use of the Query and SIREN.
45	The system includes the ability to have summary and detail data on a report, with both drill-down and roll-up capabilities (i.e. students, Teacher, school, district, etc.). Also build reporting relationships specific to or across entities.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
46	The system provides integrated wizards for creating graphs and charts.	High	X						Yes, this is accomplished through the use of Synergy SmartForm. Synergy's unique user interface is referred to as a SmartForm because of the power it provides the end user. For instance, users can find and search from any field in any screen, easily filter for specific criteria and report and graph the information with minimal steps. Other SmartForm features include automated address validation.
47	The application allows the user to customize standard reports with different selections, includes/excludes and sort sequences.	High	X						
48	The system allows the user with proper security to be able to lock defined report parameters so that it may not be changed by others.	High	X						
49	The system provides the user with a list of only the reports they are authorized to run.	High	X						
50	The system allows for the printing and designing forms in multi-language (Spanish, Vietnamese, etc.).	High	X						
51	The system has the ability to add notes electronically to reports.	High	X						
52	The system allows for free-form text searching.	Medium	X						
53	The system allows for search definitions to be stored.	Medium	X						Comment fields are searchable by txt.
54	The system allows for controlling the number of copies made of a report.	Low	X						When output as a pdf copies can be pre determined. Also can be set by number of recipients.
55	The system allows the user to designate the job start time for reports.	Medium	X						
56	The system allows the user to specify the priority of reporting.	Medium	X						Can determine which reports to send to which process servers.
57	The system allows reports to be run in the background.	Medium	X						All reports can be run while work continues via the process servers.
58	The system provides a reporting tool that produces line graphs, bar charts, pie charts, scatter charts, etc.	High	X						Through SIREN
59	The system provides a reporting tool that can toggle between chart and supporting data.	High	X						Dashboard widgets with drill-in.
60	The system allows end-user defined formulas to be included in reports.	High	X						Through SIREN
61	The system allows the formatting of dates in reports by the end-user.	High	X						Through SIREN
62	The system allows the end-user to define a report's sort order.	High	X						
63	The system allows the end-user to change a report's sort order at report run time.	High	X						
64	The system allows the end-user defined sort definitions be stored and reused.	High	X						Sort definitions can be stored through the use of the Query and SIREN reporting tools.
65	The system allows the end-user to share stored report definitions only with other end-users who have the proper security.	Medium	X						
66	The system provides mail merge capabilities.	High	X						
67	The system includes a web-based data mining application for advanced analysis of data to the individual record level.	High				X			Data analytics is on the Synergy product roadmap but a release date has not yet been determined.
68	The system allows data mining techniques such as a simple drag and drop interface to allow non-technical users to disaggregate, manipulate and analyze data.	High				X			Data analytics is on the Synergy product roadmap but a release date has not yet been determined.
69	The system provides a report at the school level of Daily Attendance.	High	X						
70	The system provides a report at the school level of Bus Lists.	High	X						Through Query
71	The system provides a report at the school level of Discipline Reports.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Administrator Portal Requirements	Priority	Y	C	M	F	3	N	
72	The system provides a report at the school level of Student Schedules.	High	X						
73	The system provides a report at the school level of Student Data Verifications.	High	X						Through Query
74	The system provides a report at the school level of Teacher Utilization .	High	X						
75	The system provides a report at the school level of Room Utilization.	High	X						
76	The system provides a report at the school level of Attendance Summary - Excused/Unexcused Absences.	High	X						
77	The system provides a report at the school level of Enrollment Verification Report.	High	X						
78	The system provides a report at the school level of Student Schedules.	High	X						
79	The system provides a report at the school level of Student Labels.	High	X						
80	The system provides a report at the school level of Class Lists.	High	X						
81	The system provides a report at the school level of Master Course Lists.	High	X						
82	The system provides a report at the school level of Graduation Requirements.	High	X						
83	The system provides a report at the school level of Honor Roll/Principal Honor Roll.	High	X						
84	The system provides a report at the school level of Class Ranking.	High	X						
85	The system provides a report at the school level of Credits Scheduled Assessment.	High	X						
86	The system provides a report at the school level of Student Demographic Sheets.	High	X						
87	The system provides a report at the school level of Perfect Attendance List.	High	X						
88	The system provides a report at the school level of Teacher Demographic Sheets.	High	X						
89	The system provides a report at the school level of Vocational class lists.	Medium	X						
90	The system provides a report at the school level of Vocational student lists.	Medium	X						
91	The system provides a report at the school level of Contact Lists.	High	X						
92	The system provides a report at the school level of Demographic, schedule, and grades.	High	X						
93	The system provides an Administrator's dashboard with summary NCLB statistics.	High	X						Dashboard and Widget tools.
94	The system allows the creation of an At-risk student dashboard that can indicate the number of students failing a course, the number of seniors without enough credits to graduate, the number of students failing courses needed to graduate, and the number of students who didn't graduate last year.	High	X						
95	The system allows the user the ability to select the metrics they want to monitor on their dashboard including such information as Race/Ethnicity, NCLB designator, Test Scores, Grades, and progress towards graduation.	High	X						
96	The systems dashboard metrics can be selected from attendance, discipline, enrollment, calendar information, test scores, and at risk students.	High	X						
97	The system allows the user to select thresholds that will change the color of the dashboard warning graphic colored coded (i.e., to green, yellow, or red) depending on the value.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides for real time class rosters including transferred student in the teacher gradebook.	High	X						
2	The system provides the ability for Student demographic data to include contact information to be accessed real time. Changes made in the Main SIS should be seen immediately in the teacher attendance/gradebook	High	X						
3	The system provides the ability to sort roster information by a variety of fields such as name, gender, ethnicity, secret name, or student number or random.	Medium	X						
4	The system provides the ability for creation of various customized seating charts for each class allowing for flexibility on the room arrangement.	High	X						
5	The system provides the ability for teachers to take daily/period attendance using the grade book and be integrated into the SIS real-time.	High	X						
6	The system provides the ability to take daily/period attendance using a teacher-defined seating chart.	High	X						
7	The system allows for generation of elementary standards-based report cards as defined by the district.	High	X						
8	The system is integrated real-time with main SIS for Report Card and Progress Report grades and comments.	High	X						
9	The system provides the ability to create and define grading categories.	High	X						
10	The system provides the ability to create and define assignments (i.e. name, weight, category, due date, notes).	High	X						
11	The system provides the ability to copy multiple assignments to multiple class files.	High	X						
12	The system provides the ability to create special scores for assignments with definition of value (i.e. NHI = Not Handed In).	High	X						
13	The system provides the ability to create, define, and enter extra credit scores.	High	X						
14	The system provides for the entry of letter or numeric scores by mouse and keyboard(tab/shift/cursor keys) and 10 key entry.	High	X						
15	The system provides for Auto-fill scores (i.e. assign same grade to an entire class of students).	High	X						
16	The system provides the ability to copy student assignments with scores to another class file (if student transfers classes).	High	X						
17	The system provides the ability for identification of missing or incomplete assignments.	High	X						
18	The system provides for the entry of alternative grade (manual grade override) for reporting period.	High	X						
19	The system provides for the selection of multiple standard comments selected from a drop-down list per student, per class, per grading period for integration into standard progress or report card.	High	X						
20	The system provides for the entry of narrative comments per student, per class, per grading period for integration into standard progress or report card.	High	X						
21	The system provides for the assignment of same standard or narrative comments to multiple students for integration into standard progress or report card.	Medium	X						
22	The system provides for automatic transfer for the reporting period to include grade, conduct, parent conference information, and all information required for reporting purposes from the gradebook directly into the main SIS system.	High	X						
23	The system provides for designation of different reporting periods within same class file.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	
24	The system provides for score display as letter grade, code, percentage and/or raw numeric score.	High	X						
25	The system provides for individual teacher formatting preferences (i.e. font, column width, etc.)	Low	X						
26	The system provides reporting period and overall grade summary columns.	High	X						
27	The system provides for entry of individual student general notes for viewing by the teacher and shared with any teacher the student has and administrators(not comments for reporting to parents).	High	X						
28	The system provides for entry of individual student assignment notes for viewing by the teacher only (not comments for reporting to parents).	Medium	X						
29	The system provides for entry of a note for entire class for viewing by the teacher.	Low	X						
30	The system provides for the generation of standard teacher gradebook reports such as an individual student grade report with assignment details.	High	X						
31	The system provides for the generation of standard teacher gradebook reports such as a class grade report with assignment details.	High	X						
32	The system provides for the generation of standard teacher gradebook reports such as an assignment list report.	High	X						
33	The system provides for the generation of standard teacher gradebook reports such as a missing assignments report.	High	X						
34	The system provides for the generation of standard teacher gradebook reports such as a list of student birthdays.	High	X						
35	The system provides for the generation of standard teacher gradebook reports such as an emergency contact list with all telephone numbers and contact information.	High	X						
36	The system provides for the generation of standard teacher gradebook reports such as a class list with a blank grid with free text column headers.	High	X						
37	The system provides for the generation of standard teacher gradebook reports such as a user defined failure list by assignment and by class.	High	X						
38	The system provides for the generation of standard teacher gradebook reports such as a bulletin board postings.	Medium	X						
39	The system provides the ability for teacher grade analysis for individual assignments such as class average with the ability to determine when parents see the information.	High	X						
40	The system provides for automatic transfer of the assignment details and scores from the gradebook directly into the parent portal. Parent portal and gradebook must be integrated.	High	X						
41	The system provides for secure access for teachers and administrators.	High	X						
42	The system provides access to all teachers assigned to a class in the master schedule.	High	X						
43	The system provides for emailing missing assignments, progress reports and D's and F's sent to parents by individual student or by class.	High	X						
44	The system provides the ability to view on one screen what has been posted for the parent to view.	High	X						
45	The system provides the ability to create special teams such as coaching.	High	X						
46	The system provides the ability to print missing assignments by individual student, for all classes at once and for every class such as math, science, social studies, etc.	High	X						
47	The system provides color coding for exemption, late, missing, below teacher defined threshold, color codes by assignment category.	High	X						
48	The system provides the ability to graph assignments by student or class.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
49	The system provides the ability to have teacher defined categories for assignments to allow sorting, printing etc.	High	X						
50	The system provides for sorting of assignments by date, category, etc.	High	X						
51	The view for Parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view)	High	X						
52	The system provides the ability for teachers to view, print etc., rosters using students "preferred" first name	High	X						
53	The system includes an integrated classroom discipline system.	High	X						
54	The system allows the teacher to be able to enter classroom discipline events for managing daily classroom discipline only which the teacher has the option to share.	Low	X						
55	The system has the ability to exempt students from assignments.	High	X						
56	The system provides a messaging system to allow teachers to email parents by class or student with a click of the mouse (not have to enter email address).	High	X						
57	The system is integrated with the gradebook/attendance with other messaging systems such as School Messenger.	High	X						
58	The system is integrated with teacher websites in programs such as School Center.	High	X						Synergy includes its own teacher website functionality for teachers within TeacherVUE.
59	A "chat" or "blog" or "daily alert" feature, in which teachers can collaborate with other teachers a student has, about the student. For example, if a student has had a death in the family the previous evening, we need to be able to make a quick pop up for other teachers of the student in their roster screen.	High	X						
60	The system displays alerts for all students as the teacher views a class list without having to scroll or "touch" each student. "Smart" alerts are defined as having some indicator by icon or color that indicate that the alert is either medical, SPED, 540 Plan, parent alert, etc. The alerts must be able to indicate multiple alerts for an individual student.	High	X						
61	The system has an attendance screen that displays all students from an average size class without scrolling.	High	X						
62	The system provides an attendance report for teachers for one student or a class of students for any date range within the school year.	High	X						
63	The system allows for an easy setup of teacher preferences. Preferences are defined as the linking of classes together so that assignments only have to be created once and can then be copied to other classes in the preference. The preference also sets the weights for the classes, the assignments types to be used and the learning targets to be used in preparing assignments.	High	X						
64	The system allows for multiple teacher preferences to be setup rather than entire gradebook.	High	X						
65	The system provides for teacher preferences to include total points (the total number of points earned divided by total possible) vs. weighted percentages (each assignment is converted to a percentage grade and is the percentage is used in calculating the average).	High	X						
66	The system provides for teacher preferences to include weighted assignments types.	High	X						
67	The system provides for teacher preferences to include weighted units of study (which are the objectives for the particular area of study).	High	X						
68	The system provides for teacher preferences to include report cycle weights.	High	X						
69	The system allows for the optional transferring of assignments, attendance, and grades when a student transfers to another class with the same teacher.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
70	The system allows for a choice of either rounding or truncating when posting a report card grade.	High	X						
71	The system allows the teacher to use report cycle weights (each reporting period has a weight) rather than cumulative (where the grades are continuous through the length of the class) , the gradebook as well as the parent portal should display the average that represents the current report cycle as well as the average that is being earned for the entire semester.	High	X						
72	The system automatically exempts any assignment prior to the time a student enters the class.	High	X						
73	The system has a process that posts the student average with the alpha conversion from the gradebook to the report card at the end of each report cycle. This grade will be stored with the course and the final grade will be moved to credit details (the areas of the system that stores courses that have final grades) at the end of the year. This process should be completed with a minimum amount of "clicks".	High	X						
74	The gradebook provides for the capability to move a student to the bottom of the column in the gradebook when a student drops the class or a toggle to hide withdrawn or dropped students.	High	X						
75	The system provides teacher reports including, but not limited to Class lists, class list with a grid for entering information, birthday lists, a failures report based on teacher defined criteria, a missing assignment report, an emergency list for the class of all parent/guardian contact information, a medical report of allergies, individual student progress reports listing all assignments and grades for a specific period of time, and student schedules and mailing labels.	High	X						
76	The system allows the teacher that teaches at multiple buildings, to be able to switch buildings without having to log out of the system.	High	X						
77	The system allows teachers to view for their students Demographic - address, phone number(s), language spoken at home.	High	X						
78	The system allows teachers to view for their students emergency contact information.	High	X						
79	The system allows teachers to view for their students basic medical - life threatening and allergies information.	High	X						
80	The system allows teachers to view for their students class schedules.	High	X						
81	The system allows teachers to view for their students standardized test results.	High	X						
82	The system allows teachers to view for their students' Transcript.	High	X						
83	The system allows teachers to view for their student attendance from previous years.	High	X						
84	The system has the option at the end of the semester to select specific students for posting of final grades without having to post the entire class. This comes into play particularly at the end of the year when the seniors graduate early and grades need to be posted to determine graduation but there are juniors in the class who have additional time to complete assignments and take finals.	High	X						
85	The system provides for teachers gradebook to be automatically archived at the end of the year for all classes taught throughout the year.	High	X						
86	The system allows for schools to have the option to allow teachers to enter attendance reasons.	High	X						
87	The system allows a spreadsheet format for entering grades using tab and shift tab to go across and the enter key to go down as well as the arrow/cursor keys.	High	X						
88	The system has the ability to import raw assessment data.	High	X						
89	The system has the ability to attach three or more of any media type to an assignment.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Teacher Portal Requirements	Priority	Y	C	M	F	3	N	
90	The system enables online access to syllabus and assignments.	Low	X						
91	The system provides for substitute teachers to easily be entered to the system, and only allows the substitute teacher to enter attendance and look up non-confidential student information.	High	X						
92	The system allows for the ability to enter Teacher Grading comments by either comment code or by comment text. In either case it would be beneficial or the system to provide feedback confirming the comment text that was selected.	High	X						
93	The system allows the teacher to override the overall final mark for a student even though the electronic gradebook calculated a different final mark for the student.	High	X						
94	The system allows for a standards-based electronic gradebook for elementary teachers that interfaces automatically with the grading application.	High	X						
95	The system allows for a standards-based electronic gradebook for secondary teachers that interfaces automatically with the grading application.	High	X						
96	The system allows the classroom teacher to sort students and group students based upon various characteristics.	High	X						
97	The system allows identified state-level test scores and district-level test scores to be included in the display of the gradebook as well as to be in the gradebook overall grade calculation.	High	X						
98	The system allows teacher definition of how their 'home' screen looks and appears.	High	X						
99	The system allows for teacher to optionally use the imbedded teacher electronic gradebook. Whether or not a teacher uses this function is visible to the administrator.	High	X						
100	The system allows for a variety of teacher marks (+,-, smiley face, letter grade, number) to be used to assess student performance, and a method how each of these different marking scales can be compared.	High	X						Synergy supports a variety of teacher marks, but does not support graphic images.
101	The system provides access to outside educational tools and materials if a student performs at a certain level on a particular standard.	High	X						
102	The system provides multiple formats of reports cards based upon student needs. For example, students in Dual Language programs may require a progress in both their Native and English literacy.	High	X						
103	The system allows the classroom teacher to identify which assignments, marks and other information is available for view by parents and students.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	
1	The system provides parent and students access to assignments and assignment grades by class or date range.	High	X						
2	The system shall display a list of the student's current classes with their current and cumulative average.	High	X						
3	The system supports teacher options around grade calculation (empty counts as zero or exempt, weights, etc.) shall be clearly displayed in the parent/student portal in an intuitive manner. All necessary information should be provided to calculate and arrive at the same final grade as displayed.	High	X						
4	The system provides the ability to link to teacher's website (School Center) to view assignments, instructions, etc. (i.e. a free form URL text field for the teachers)	High	X						
5	The system allows the teachers control over when the parents see specific assignments and their associated grades	High	X						
6	The system should have teacher selected indicators on assignments such as "assignment has not been graded", "assignment has been handed in"	High	X						
7	The system supports a notification system, set by user preference option, for when a parent enters system is alerted for missing assignments, low grades, etc.	High	X						
8	The system shall be fully ADA compliant/accessible (i.e. screen reader compatible)	High				X			Synergy displays information to the user (staff, parent, or student) using text, graphics and colors. When colors are used, they are accompanied by different image shapes. Edupoint will be adding screen reader capability for the visually impaired to the Synergy Technology (ST) framework (which Synergy is built on) to comply with Americans with Disabilities Act (Section 508) within the next two years.
9	The system provides parent and students access to Pay Required/Optional Fees Online. Once a required fee has been paid, it should not be available to pay again.	Low	X						
10	The system shall have the ability to view fee payment history including detail of which fees were paid	Low	X						
11	The system provides for viewing of lunch balance, lunch history and payment on lunch account through integration with a third party POS.	Low	X						
12	The system shall be fully PCI compliant in regards to fee/lunch payments. System should not handle the credit card number directly.	Low					X		Synergy integrates with third-party POS systems that are PCI compliant.
13	The system should provide parents with a payment plan option (as part of a fee payment system)	Low	Partial						Synergy allows for partial payments, but does not have a fee payment plan capability.
14	The system provides parent and students access to Attendance including date and reason by date range or by class.	High	X						
15	The system allows multiple logins to be associated with the same student to provide for split-household situations.	High	X						
16	The system provides the option to allow parents to report absences and associated reasons through system.	High	X						
17	The system provides the option to post announcements to parent and students .	Low	X						
18	The system supports a single login for parents to access all of their assigned students.	High	X						
19	The system should allow the option to provide sign-on verification for other systems (i.e. a web service or database procedure which will accept a username and password and return success/failure).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	
20	The system must have the ability for parents and students to reset a forgotten password by e-mail (using a GUID-based URL or something similar).	High	X						
21	The system must store all passwords in a secure manner (i.e. one-way, salted encryption).	High	X						
22	The system must allow parents/students to update sms/email/phone contact information and specify contact preferences for different categories of messages (i.e. attendance notifications by SMS, grade alerts by e-mail, etc).	High	X						
	The system allows the user to specify whether or not non-custodial parents can modify/update custodial parent contact information and vice-versa.		X						
	The system provides for tracking the movement of the student from one parent household to another whether it be scheduled or ad-hoc.							X	
23	The system provides parent and students the ability to request courses for the following year during a time frame defined by/per school.	High	X						
24	The system provides parent and students access to the student's medical Information. This needs to be configurable to allow the district to determine which medical information should be accessible.	High	X						
25	The system provides parent and students access and ability to print a parent friendly version of the student's current schedule.	High	X						Via web browser print only
26	The system provides parent and students access and ability to print an unofficial copy of the student's transcript.	High	X						Via web browser print only
27	The system provides parent and students access and ability to print the student's report card.	High	X						
28	The system allows the update of Demographic and Emergency Contact Information via the parent portal that includes an approval process by the affected school registrar.	High	X						
29	The system should provide parents and students the student's teachers' and counselor email addresses with the option of an in-site e-mail form which generates an e-mail to that recipient.	High	X						
30	The view for parents and students of assignments and grades should be the same as the teachers (i.e. if a teacher is discussing a child's grade on the phone with a parent, they should be able to be looking at the same general view).	High	X						
31	The system should allow for the district to display standardized test scores and percentiles. The district should have the flexibility to determine which tests are viewed by parents.	High	X						
32	The system should provide an option to allow students/parents to view and update the student's 4 year course plan.	High	X						
33	The system has the option to have course requests populated from a student's 4 year course plan..	High	X						
34	The system should provide for the ability for the district to add additional screens/options/data fields.	High	X						
35	The system has the ability for parents to self-select threshold/event e-mail alerts (i.e. when Sarah's grade in math drops below a C, when Johnny is tardy to a class, etc.)	High	X						
36	The system provides parent and students a view of met diploma requirements. Views should include where the student is currently, will be at the completion of current courses, and based on course requests for next year.	High	X						
37	The system allows the district the ability to integrate with an external course application/LMS (i.e. Blackboard).	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Parent-Portal Requirements	Priority	Y	C	M	F	3	N	
38	The system allows for parents to sign themselves up for access to the parent portal. This would be approved by the school of their oldest child.	High	X						
39	The system allows for the parent to request additional students added to their account.	High	X						
40	The system allows the parent to request a transfer of their student to another school.	Medium	X						
41	The system provides all documents for a parent to register a new student, with workflow to the appropriate people for approval.	High	X						
42	The system has the flexibility to enable/disable portal features (i.e. course registration, assignments, etc) by school.	High	X						
43	The system should track the number of times parents have accessed the parent portal information and log this information to be viewed by administrators, counselor and teachers.	High	X						
44	The system provides the display of the non school days for the year.	High	X						
45	The system provides support for student portfolios for both electronic and scanned artifacts.	Medium	X						
46	The system allows for the electronic tracking of notices, flyers, etc. that used to be sent home with the student (picture day reminders, music programs, etc)	Medium	X						
47	The system includes the ability to add custom menu links to the parent/student portal that link to district applications.	High	X						
48	The system enables online access to syllabus and assignments.	Low	X						
49	The system allows the parent or student to be able to print/display an unofficial transcript as well as a progress towards graduation status report.		X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	State Reporting Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system provides the necessary data structures and data elements necessary to produce the Washington State reports.	High	X						Edupoint's solution includes the delivery of all state mandated WA reporting.
2	The system provides auditing reports to support the aggregate numbers associated with each state report.	High						X	Because this is outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate.
3	The system provides exception reports detailing each student who is not included in each state report.	High	X						
4	The system allows overrides of student data to accommodate discrepancies in detail data.	High						X	
5	The system provides for electronic transfer of state report information to the state department of education per the reporting requirements.	High	X						
6	The system provides a state grade level equivalent value for each district defined grade level.	High	X						
7	The system provides the ability to define a state equivalent to each code/description value available in the system.	High	X						
8	The system includes a field for tracking whether or not the student is Hispanic, and if Hispanic which specific Hispanic culture based upon a list defined by the district.	High	X						
9	The system includes a field for tracking the students Race code. This district defined list of race codes is cross-walked to a Federal code of Race.	High	X						
10	The system includes a field that is automatically populated whenever the Federal Race and Ethnicity fields are modified. These field is a composite of these two fields, typically referred to as a Federal Race and Ethnicity code.	High	X						
11	The system provides the P-223, Monthly Report of School District Enrollment Eligible for Basic Support.	High	X						
12	The system provides the P-223H, Monthly Report of School District Special Education Enrollment.	High	X						
13	The system provides the P-240, Monthly Attendance Report of Ancillary Services to Part-Time Students Eligible for Basic Support.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.
15	The system provides the DOH348-002a, Required School Immunization Status Report.	High	X						
16	The system provides the M-873, Scoliosis/Kyphosis Screening Report.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	State Reporting Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
17	The system provides the M-765A, Traffic Safety Education Certificate report.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.
18	The system provides the 1503 Washington State Standardized High School Transcript report, meeting the requirements of the most recent version of the OSPI document titled Transcript Developers Guide.	High	X						
19	The system provides the 1094E Learning Assistance Program End of Year Report.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.
20	The system provides the 1094ES Learning Assistance Program End of Year Summer School Report.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.
21	The system provides the OMB 1810-0503 Annual Performance Report Title IX Indian Education Formula report.	High	X						Edupoint's solution includes the delivery of all state mandated WA reporting. Functionality will be provided to support NSD in the 2014/15 school year.
22	The system provides the OMB 1870-0500 Civil Rights Compliance Report.	High	X						
23	The system provides the P223S Nonstandard School Year AAFTE Enrollment Eligible for Basic Support Report.	High						X	Because this requirement appears to be outside of state mandated state reporting functionality, this functionality could be provided with customization. Edupoint would be interested in working with NSD to fully scope this effort to provide a cost estimate. If this is a component of WA State reporting, then Edupoint commits to developing and delivering this fuctionality for the 2014/15 school year.
24	The system provides the Office of Civil Rights Data report.	High	X						
25	The system provides an extract file compatible with the CEDARS OSPI system, compliant with the 2013-2014 school year.	High	X						

Student Information System Functional Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	State Reporting Requirements	Priority	Y	C	M	F	3	N	
26	The system provides a report of Alternative Learning Student populations.	High	X						Edupoint's solution includes the delivery of all state mandated WA reporting. Functionality will be provided to support NSD in the 2014/15 school year.
27	The system provides the ability to calculate FTE based on minutes/week.	High	X						
28	The system provides the ability to override FTE when needed.	High	X						
29	The system provides the ability to set FTE Limits: 1.0 Basic, 1.2 Basic and Running Start, 1.6 Basic and Skills Center, limit running start to .2 FTE if Basic + Skills Center is 1.0 or greater.	High	X						
30	The system provides the ability to be able get all these FTE numbers by district by school, and by grade (By school is needed for internal/district purposes but may eventually become a State requirement).	High	X						Via Query
31	The system provides the ability to reconcile variances between District enrollment FTE and School Enrollment FTE.	High	X						Edupoint's solution includes the delivery of all state mandated WA reporting. Functionality will be provided to support NSD in the 2014/15 school year.
32	The system provides the ability to identify students with 20 consecutive absences.	High	X						
33	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports transitional Bilingual Students	High	X						Via Query
34	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports of students that have exited the Transitional Bilingual program in the previous school year	High	X						Via Query
35	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports 9th – 12th grade Vocational FTE	High	X						
36	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports 7th and 8th grade Vocational FTE	High	X						
37	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Skills Center FTE	High	X						This functionality is currently provided, but will be enhanced to meet the specific report requirements.
38	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Open Doors (1418) Youth Reengagement	High	X						This functionality is currently provided, but will be enhanced to meet the specific report requirements.
39	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports ALE FTE	High	X						This functionality is currently provided, but will be enhanced to meet the specific report requirements.
40	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Running Start FTE	High	X						
41	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Running Start Only Students	High	X						
42	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Out of District Students (students not waived into the district – WaNIC)	High	X						This functionality is currently provided, but will be enhanced to meet the specific report requirements.
43	For purposes of auditing aggregate numbers reported on the P223 report, the system provides auditing reports Student's home district (for students waived into our district – specifically for ALE students).	High	X						This functionality is currently provided, but will be enhanced to meet the specific report requirements.

Response Instructions to Technical & Other Requirements

This section of the RFP contains detailed requirements for the SIS desired by Northshore School District (NSD). In responding to the requirements located in the spreadsheet tabs labeled, the following codes must be used.

Please place the correct code e.g., "Y" or "N" etc., under the appropriate response code column for each of the requirements.

Response to Requirement	Code	Definition and Criteria
Yes	Y	Functional capability exists. Requirement is installed and operational at other sites and can be demonstrated to NSD.
No	N	Requirement will not be provided.
Customization	C	
Modification	M	Requirement will be met through changes to the source code which would require analysis and re-application during future updates, upgrades, or when applying software patches.
Supplied by Third Party	3	Requirement will be met by third-party software package and is included in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed. If the solution requires customization, you must describe the estimated level of complexity to meet this requirements based on your estimated level of effort.
Future	F	Requirement will be met by the solution that is currently under development, in Beta test, or not yet released. Note: In the Comments column next to this response, indicate the date when requirement will be available for implementation.

Note:

1. An omitted response will be assumed to be the same as a response code of "N".
2. Any deviation from the response codes will be re-coded at the discretion of NSD.
3. In this Worksheet there are 4 Tabs. Each must be completed with codes above.
 - 1 Data Integration & Migration
 - 2 Technical Infrastructure
 - 3 Third Party Integration
 - 4 Training & Support

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Data Integration & Migration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	What resources are available from the vendor to assist with the conversion of data from the customer's previous SIS?	High	X						Edupoint's comprehensive approach to data conversion will migrate all data necessary (for the agreed upon number of years) to allow schools to start using the new SIS, and allow complete and accurate outputs from the new SIS; i.e., school and district level reports for each functional category, and state and federal reports. Edupoint offers over 75 pre-defined data import maps allowing for clients to convert virtually any data, and in a simple yet effective manner. Trial conversions will be performed in an iterative fashion, with data exception reports provided to client staff following each subsequent trial conversion.
2	The vendor provides a description of the procedure for data conversion, including associated costs, from existing application software to the proposed vendor's system.	High	X						Three (3) years of data conversion have been priced in the base pricing provided by Edupoint. Prior to performing the Production Conversion, Edupoint staff will conduct a Data Validation Review (DVR) process with client staff. This process will analyze converted data in all functional areas of the application, ensuring accuracy and completeness. When a student is converted, all of their data in the following modules will be converted, even if it is data that existed prior to 3 years ago. For example, a student who graduated 3 years ago will be converted and all of that student's data in the following modules will also be converted (such as this student's entire course history, which could include course data from 8 or 9 years ago). All student data that is required for State and Federal reporting will be converted. Modules in which all years of data for each student is converted include: a) Student demographic data b) Parent demographic data c) Student Immunizations d) Student Health Conditions e) Student Health Screenings f) Student Course History g) Student Achievements h) Student Conference i) Student Discipline (Incident based discipline) j) Student Programs (ELL, Free & Reduced, Talented and Gifted (TAG), Special Education, etc.) k) Student Test History Some data for a student is specific to the student's enrollment and for the following modules, only the years being converted will have data converted for the student. At the conclusion of data conversion, Edupoint will provide the tools and training to allow the District to convert any number of additional years of data.
3	The vendor provides information on the level of experience of all vendor employees who will be working on the data conversion from the previous SIS.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Data Integration & Migration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
4	The vendor assigns a single point of contact project manager during the migration from the legacy platform to the new platform.	High	X						
5	The vendor has the ability to provide for custom changes to standard code.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Technical Infrastructure Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The system utilizes industry standard RDBMS platform which supports ANSI-SQL and ODBC connectivity Preferred (in order of preference): MySQL 5.6, PostgreSQL 9, MariaDB 10, SQL Server 2008 R2, Oracle 11g, or later versions of any	High	X						
2	The district will have root access to all database content.	High	X						Synergy is not a "black box" solution that limits access to the database. Our solution allows administrators to access to the database and makes accessing and reporting data as simple as possible for all users.
3	The system allows the customer be able to create custom tables, views, triggers, and stored procedures.		X						
4	The system is designed to allow the customer be able to create custom tables, views, triggers, and stored procedures so that these custom modifications are not impacted or otherwise affected by vendor provided patches, updates, and upgrades.	High	X						
5	The system has ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High	X						Yes, lookup tables that define the list of valid values for specific fields provide the drop down lists. The definition of each entry can have a start/end date to allow districts to retire old codes as well as introduce new ones.
6	Customer will be able to develop their own custom screens and reports. Vendor provided patches, updates, and upgrades will not delete, overwrite, or otherwise damage customer developed content, reports, and screens.		X						
7	The development environment or tools for creating custom reports and screens must be non-proprietary.	High	X						
8	The system software application and database servers run on industry standard 64-bit Operating systems running in VMware vSphere 5 or later. Preferred: Debian Linux, Ubuntu Linux, Redhat Linux, Windows Server 2012 or later releases	High	X						
9	The system software supports the most current release of the development environment recommended by the vendor.	High	X						
10	All application functionality for end users is available on current stable releases of Mac OS X and Windows and on at least three of the following web browsers: InternetExplorer, Safari, Firefox, and Chrome.	High	X						
11	The system does not use Java or Flash applets as any part of the end user interface.	High	X						
12	Areas of the system intended to be accessed by teachers, students, and parents will be accessible through a web browser or a custom client on iOS 6, Android 4.2, or later releases of each. The system supports these browser's latest release within 6 months of final release date		X						
13	List any browser plug-ins required or recommended for use by the system including what area of the site uses them and the oldest versions of the modules that are supported by the system.	High	X						Synergy is a true web-based system that does not require any client or server side companion products, plug-ins or other products to operate.
14	The vendor supplies customer with data diagrams detailing all tables, columns, relationships, indexes, triggers, and stored procedures.	High	X						
15	Describe how Customer will be able to run test, development, and training instances of the system on their network. Will those instances require additional licenses?	High	X						Test, development and training sites do not require additional Synergy licenses.
16	The system allows for transactional backups during the day to assist in near time of failure recoveries.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Technical Infrastructure Requirements	Priority	Y	C	M	F	3	N	
17	If the system sends or receives email messages directly, it will use SMTP and/or IMAP. The system will not run its own mail service. If it uses SMTP, it will support SMTP authentication and TLS.	High	X						
18	System does not require continual vendor access for operation.	High	X						
19	System does not require that any ports other than ports for secure web access be exposed outside of the Customer network	High	X						The system only requires port 443 (HTTPS/SSL) to be exposed.
20	All vendor access to the Customer implementation of the system will be through secure, encrypted communication protocols such as ssh and sftp	High	X						Edupoint generally uses Remote Desktop Services (RDS) on Windows Server 2008 R2 to securely access Customer implementations. RDS can be configured to use Network Level Authentication and Transport Layer Security to provide security similar to "ssh".
21	All server access will be controlled by the Customer. Vendor will not retain root access to the system or have any "backdoor" access into the system unless specifically allowed by the Customer.	High	X						Almost all Edupoint customers have this policy.
22	The vendor has a recommended method for backup up the system (application files and databases) and the method for restoring the system from a backup. Please provide these details.	High							Microsoft SQL Server provides full backup and recovery processes. It supports Full backups, Differential backups and Transaction log backups. Because all data in the Synergy Education Platform is stored in the database, backup of the database provides complete recovery capability. Full and differential backups take place during times of lower database usage (such as at night and on weekends). During the day, the transaction logs (also called redo logs in Oracle) are backed up, typically as often as every 15 minutes. Recovery will restore the database to the time of the last transaction log backup (within 15 minutes of the failure if transaction logs were backed up every 15 minutes).
23	Describe the recommended hardware configuration for your solution given a district of 30,000 students and 2,500 staff.	High	X						See hardware and software recommendations in section 3 of our proposal response.
24	The vendor provides a simple graphic of the hardware architecture (including at a minimum database servers, application servers, and load balancers if applicable).	High	X						Please see page 10 of the "General Hardware and Software Requirements" document located in Section 3D of our proposal response for a graphic of the Synergy Infrastructure Overview.
25	Will Customer be able to create custom tables, views, triggers, and stored procedures? How will these be maintained across vendor provided patches, updates, and upgrades?	High	X						Customer created tables, views, triggers and stored procedures are not affected by Edupoint provided patches, updates and upgrades.
26	System has the ability to retire list values without requiring that they be deleted from the database. This is intended to provide referential integrity over the life of the system.	High	X						
27	The system supports authentication via Active Directory (Windows Server 2008 functional level) with LDAPS support, logon for AD accounts with expired passwords, and requires no additional AD schema extensions	High	X						

Student Information System Technical & Other Requirements for NSD		Priority	One Response per Requirement (Vendor Use Only)						Vendor Comments/ Proposal Section Reference
#	Technical Infrastructure Requirements		Y	C	M	F	3	N	
28	The system supports for user provisioning/deprovisioning through Active Directory integration with district defined account templates - user account is still manually activated in SIS by district staff Example: a new user is created in the "Teacher" container in AD - account is automatically provisioned with standard teacher rights in the SIS, district staff can then review this account and easily activate it.	High	X						
29	The system supports full SSL connectivity from clients to the application servers with wildcard SAN (Subject Alternative Name) certificate support.	High	X						
30	The system supports HIDS (Host Intrusion Detection System).	High	X						
31	The system supports logging to remote servers via syslog.	High	X						Edupoint generally uses Remote Desktop Services (RDS) on Windows Server 2008 R2 to securely access Customer implementations. A syslog server can be configured and syslog clients can be installed on every web, process and database server (running either Windows 2008 R2 or Windows 2012). Or Microsoft System Center can be used instead of syslog to capture events from every server into a single location.

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Third Party Integration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The vendor provides interfaces and protocols for integration with other systems. Please describe each interface and /or protocol for integrating with other systems.	High	X						Yes, Synergy can interface with 3rd party solutions such as food service, library and payment systems via SIF, Synergy import/export tool, or custom interface development. Edupoint offers multiple integration types to meet the unique needs of the client: • School Interoperability Framework (SIF): The usage of SIF to support integration of third-party products. (Not Priced) • Import/Export: The creation of Synergy-defined queries and imports to support third-party product integration. • Custom Integration: The development of a solution (e.g. SQL SSIS Package, software, SQL scripts, etc.) to support the integration of third-party products. (Not Priced)
2	What security is provided in the system to restrict the import and export capabilities to only authorized users?	High	X						Synergy leverages a Role-Based security model that allows users to tailor user access to permit/restrict access to modules and functionalities such as import/export, views and even to the field level. This granularity can be extended to individual user accounts as well as to roles. Any field(s) that a user is not permitted to access via the interface is also inaccessible to that user via reports, queries, and exports. Synergy security features ensure the highest level of data security available: • Comprehensive access management by user, role, school, group of schools, or district, and by screen, tab or field • Several levels of data access (no see, read only, update, allow add, etc.). • Full compliance with FERPA and HIPAA • Transaction auditing • Time/day access restrictions
3	The system allows user-specified data for all students, enrolled and withdrawn, from “current” and “prior” school years can be automatically exported/downloaded in a variety of common formats, such as flat file with fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High	X						
4	The system allows user-specified data for all students, enrolled and withdrawn, for the “current” school year as well as teacher information can be automatically imported or uploaded at regularly scheduled intervals (e.g., hourly, daily, etc.) without any human interaction from the third party software.	High	X						
5	The system allows user-specified data for all students, enrolled and withdrawn, for “current” school year can be automatically imported/uploaded from files in a variety of common formats, such as flat file with fixed-width fields, .CSV, MS Excel, pipe-delimited.	High	X						

Student Information System Technical & Other Requirements for NSD				One Response per Requirement (Vendor Use Only)						
#	Third Party Integration Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference	
6	The system allows during data import, for the system to validate data integrity and produce update/rejection reports and files.	High	X							
7	The system includes real-time data import and export utilities with support for a wide range of industry-standard formats, including fixed-width fields, comma-separated values (CSV), or tab-separated values (TSV).	High	X							
8	The system imports test results for tests including, but not limited to State Assessments, SAT, and ACT.	High	X							
9	The system is able to create extract records as required by the state department of education.	High	X							
10	What methods are available for uploading student/staff/parent photos in bulk? Can it be done through the application web interface? Can uploads be done by school staff?	High	X						Yes, Synergy supports uploading student photos and staff photos. Photos can be imported through the web application one student/staff at a time or, an application can be launched from within the application, can import photo en masse. This en masse application or individual upload process can be secured so only those with access will be able to upload photos.	
11	What ability will the Customer have to change the look and feel of the web interface by modifying graphics, html, or css?	High						X	Customers have the ability to override the look and feel of the Login screen, but not screens within the web application.	

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
1	The vendor provides accurate and complete training materials for the proposed version of the software. They will have knowledgeable trainers readily available for on-site sessions with end-users, as well as availability of web-delivered/distance learning training. If an assigned trainer is replaced, the replacement should be of equal or better experience.	High	X						Please refer to section 4 of this proposal for a full overview of the Edupoint training program.
2	The vendor provides an extensive and high-quality training program. The student information system will affect virtually all departments and functions in the school district; therefore all staff members will require some level of training.	High	X						
3	The vendor must work closely with the district to develop a training plan designed to bring comprehensive SIS instruction to the district staff, all end users, technical support staff, system administrators, and district training team. The training needs to be specific to the operational rules of the district and to the tasks required of the end users. The vendor must have experience in training people with varying level of computer proficiency.	High	X						
4	The vendor provides training materials for full implementation. The district will be given the right to reproduce all training materials as needed. Materials shall include practice exercises, “cookbook-type” fast reference guides, and training manuals.	High	X						
5	The training materials provided by the vendor are distributed in a widely used editable format, such as Microsoft Word, Power Point, or PDF.	High	X						
6	The vendor will train the district’s technical staff. Vendor must specify what core knowledge/skills will be required for the technical staff. The vendor shall perform on-site training and consulting services for the district’s technical/support staff during the implementation and transition to the new SIS software system. The vendor must include in their proposal a plan for how this knowledge transfer will occur, and identify the roles that the district will assume once the knowledge transfer is complete. If any of these roles requires advance knowledge or certification before the knowledge transfer can occur, this must be noted in the proposal.	High	X						
7	All training supplied by the vendor will be conducted at the district’s facilities and/or via a web-based training. The vendor must provide training options that are available for the proposed system including recommendations for “best practices” approach. The vendor shall also specify what training a third-party supplier may provide. Vendor must indicate what training is viable for a train the trainer approach.	High	X						All training will be delivered at the District's facilities.
8	The vendor supplies and promotes continuous training on the application software on a periodic basis.	High	X						
9	The vendor provides training in the use of the report writing tool for the group of users authorized to use the tool.	High	X						
10	The vendor provides up-to-date, accurate, extensive, online, and searchable documentation identifying step-by-step procedures for completing tasks and activities. In addition, District will require documentation for any customizations or configurations that are done. District would like the ability to edit documentation in order to customize for their business rules.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
11	The vendor provides a sample of user documentation that would be delivered with the application software.	High	X						Please see "Attendance User Guide" at the end of proposal section 3D. The following is a list of user guides available in electronic format on Edupoint's FTP, which would be available upon award to Edupoint . All guides include step-by-step instructions with screen shots and field descriptions. • Synergy Report Guide • Synergy Attendance User Guide • Synergy Course History User Guide • Synergy Discipline and Conference User Guide • Synergy Fees Administrator and User Guide • Gradebook User Guide • Synergy Grading User Guide • Synergy Health User Guide • Synergy Locker Guide • Synergy Master Schedule Builder Guide • Synergy Query and Reporting Guide • Synergy Quick Start Guide for Users • Synergy Scheduling Guide • Synergy Student Information User Guide • New Year Rollover User Guide • TeacherVUE User Guide • Test History User Guide • Various State Reporting Guides
12	The vendor provides a sample of training documentation that would be delivered with the application training.	High	X						Please see "TTP Course History Participant Guide" at the end of proposal section 3D.
13	The vendor either provides or allows the development of video training sessions.	High	Partial						Edupoint would allow development of video training sessions, provided those recordings would remain confidential and not open to the public, or posted on any public web site.
14	The vendor provides manuals and documentation in PDF format.	High	X						
15	The vendor supplies manuals and documentation in a format that can be edited by the District, allowing the District to customize the documentation for their users.	High	X						
16	The vendor allows the district authorization to print unlimited additional copies of user documentation.	High	X						
17	The system will be accompanied by written and online user manuals and other system support documentation in electronic format. The application provides for extensive documentation identifying end user step by step procedures for completing tasks and activities as well as technical documentation	High	X						
18	The vendor provide will provide on-site installation and implementation of the software. Please provide information on procedures for installation and implementation of software.	High	X						Installation and implementation information has been included in Section 4 of this proposal.
19	The on-site support provided by the vendor will be for an agreed upon period of time after product implementation is completed.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
20	The vendor offers service and support options including 7 X 24 phone support for critical, production-halt situations.	High	X						
21	The vendor offers service and support options including on-site or dial-in response within two business hours for production-halt situations.	High	X						
22	The vendor offers service and support options including 7 X 12 phone support for non-production-halt situations.	High	Partial						Customers can contact Edupoint support staff by phone Monday through Friday from 6:00am to 6:00pm MST. After hours technical and phone support can be provided for an extra cost, but is not priced in this proposal.
23	The vendor offers service and support options including on-site customization and trouble-shooting during implementation.	High	X						No customization has been proposed as part of this fixed price contract.
24	The system is integrated with Internet services that allow users to access Help desk services via the Internet and phone calls to ask questions related to the software, inquire about the status of current calls, and to receive software and documentation updates automatically after software implementation is complete.	High	X						
25	The vendor has an adequate number of support phone lines and the necessary staff to handle calls.	High	X						
26	The vendor provides an outline of their formal problem resolution management procedure, escalation procedure, service level agreement, etc.	High	X						Please refer to section 4 of this proposal.
27	The vendor has a method for prioritizing support cases for resolution, i.e. functional problem, user down, system down, etc.	High	X						
28	The vendor provides prompt notification and explanation to the district's technical/support staff of discovered software failures or functional defects; and immediate release of documented software correction must be made upon problem resolution.	High	X						
29	The vendor guarantees the timely response to reports of software failures or functional defects discovered during normal use of the product. The vendor shall present its plan to address and correct the reported problem including needed resources, time, and cost (if not covered in contracted maintenance agreement).	High	X						
30	The vendor provides sufficient management, user, and technical/support staff training and documentation in the event that significant functional or technical changes are made to the installed software solution.	High	X						
31	In the event that the software product is to be moved from the existing hardware platform to a different platform, the vendor will provide consulting and/or technical assistance in the planning and execution of such a move.	High	X						This assistance can be provided at the daily consulting rates and is not included in the proposal.
32	The vendor business plan includes the ability to submit regular routine requests for improvement or changes in future upgrades via a User Group Forum. This process includes user feedback for proposed changes to future upgrades.	High	X						
33	The vendor provides a software update service that furnishes regularly scheduled updates, annually and others as needed.	High	X						
34	The vendors software will always be updated to support the latest version of all underlying components (operating systems, databases, browsers, etc.)	High	X						
35	The installation of software updates preserves the integrity of district-defined fields and web pages previously customized by the district.	High	X						
36	The system provides the capability to migrate easily to new software releases (updates) and automatically convert the database.	High	X						
37	The vendor provides advance copies of release notes that describe the changes that will be applied with a patch or version upgrade.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
38	The vendor supplies annual support subscriptions and includes, at no additional charge, software maintenance.	High	X						
39	The vendor supplies annual support subscriptions and includes, at no additional charge, software updates.	High	X						
40	The vendor supplies annual support subscriptions and includes, at no additional charge, normal changes to the district requirements and state department of education requirements.	High	X						
41	The vendor supplies annual support subscriptions and includes, at no additional charge, customer support website.	High	X						
42	The vendor supplies annual support subscriptions and includes, at no additional charge, weekly notifications by email.	High	X						
43	The vendor supplies annual support subscriptions and includes, at no additional charge, interactive on-line user groups.	High						X	
44	The vendor supplies annual support subscriptions and includes, at no additional charge, remote diagnostics and control capability by support technicians.	High	X						
45	The vendor supplies annual support subscriptions and includes, at no additional charge, unlimited toll-free telephone support.	High	X						
46	The vendor supplies annual support subscriptions and includes, at no additional charge, Fax line support.	High	X						
47	The vendor supplies annual support subscriptions and includes, at no additional charge, E-mail support.	High	X						
48	The vendor supplies annual support subscriptions and includes, at no additional charge, on-line searchable product Knowledge Base.	High	X						
49	The vendor supplies annual support subscriptions and includes, at no additional charge, FAQ online.	High	X						
50	The vendor limits annual support subscription cost increases to no more than 8% per year.	High	X						
51	The vendor provides a comprehensive maintenance plan for application software, hardware, and engineering services, including any updates.	High	X						Hardware maintenance is provided by the hardware manufacturer.
52	The vendor provides local on-site support.	Low	X						This can be provided on an as-needed basis and based on daily rates.
53	The vendor supplies a description of the procedure by which the customer may request changes or enhancements.	High	X						
54	Prior to installation, the vendor must provide a detailed description of services to be rendered, together with a detailed schedule of events, to facilitate installation and start-up of the application software.	High	X						

Student Information System Technical & Other Requirements for NSD			One Response per Requirement (Vendor Use Only)						
#	Training & Support Requirements	Priority	Y	C	M	F	3	N	Vendor Comments/ Proposal Section Reference
55	The vendor supplies technical training to system administrators and technical developers and users. Please provide a sample.	High	X						Edupoint provides all clients with comprehensive technical documentation in electronic format and can be accessed from any view in the system and is also available on the Customer Support FTP site. Edupoint also provides data mapping in the form of an Excel spreadsheet, as well as database schemas in Visio format. Edupoint Technical Notifications (ETNs) are also used to give a clear overview of enhancements and upgrades. Please see "Grading Administrator Guide" at the end of proposal section 3D. The following is a list of technical and administrator guides available in electronic format on Edupoint's FTP, which would be available upon award to Edupoint. All guides include step-by-step instructions with screen shots and field descriptions. • Synergy Attendance Administrator Guide • Synergy Course History Administrator Guide • Synergy Discipline & Conference Administrator Guide • Gradebook Administrators Guide • Synergy Grading Administrator Guide • Synergy Health Administrator Guide • Synergy Locker Guide • Synergy Master Schedule Builder Guide • ParentVUE and StudentVUE Administrator Guide • Synergy Query and Reporting Guide • Synergy Scheduling Guide • Synergy Student Information Administrators Guide • Synergy Systems Administrator Guide • Synergy Security Administrator Guide • Synergy Systems Installation Guide • New Year Rollover Administrator Guide • Quick Start Guide for Administrators
56	The vendor supplies technical documentation to system administrators and technical developers and users. Please provide a sample.	High	X						Please see "Grading Administrator Guide" at the end of proposal section 3D.

NSD Cost Workbook

Table of Contents

Bidder:	Edupoint Educational Systems

← Insert Bidder Name here.

Worksheet Title	Description
A8-1. Total Cost Summary	Worksheet for Bidder to provide a summary of the total proposed costs.
A8-2. Software Costs	Worksheet for Bidder to provide one-time Software costs of the NSD solution.
A8-3. Hardware Costs	Worksheet for Bidder to itemize all one-time and ongoing hardware costs.
A8-4. DDI Services Costs	Worksheet for Bidder to provide one-time costs for Design, Development and Implementation of the NSD.
A8-5. Support Services Costs	Worksheet for Bidder to provide ongoing maintenance and operations (M&O) support costs.
A8-7 Payment Schedule	Worksheet for Bidder to describe the payment schedule.
A8-8. Pricing Assumptions	Worksheet for Bidder to provide Pricing Assumptions.
A8-9 Supplemental Cost Information	Please Complete this narrative Supplemental Cost Information Tab

PLEASE NOTE:

1. The Bidder's name should appear across all other worksheets.
2. Cells requiring Bidder data entry are marked in light-green highlight to clearly indicate which cells are available for data entry as indicated above left.
3. Cells that contain titles and formulas are marked in gray high-light.
4. Cells that are not applicable are marked black.
5. It is the Bidder's responsibility to ensure the integrity of the Cost Workbook formulas.

NSD Total Cost Summary
Edupoint Educational Systems

One-time NSD Costs	
Software Costs	\$256,192
Hardware Costs	\$67,116
Design, Development and Implementation Services Costs	\$181,398
Interface Costs - included in implementation	\$0
<i>Unanticipated Tasks: Bidder Implementation Costs (10% of implementation costs)</i>	\$18,140
Total One-time Cost	\$522,846

	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	<u>Total</u>
M&O NSD Costs						
Software License/ Maintenance Costs	\$256,192	\$107,088	\$107,088	\$107,088	\$107,088	\$684,544
Hardware Costs	\$0	\$0	\$0	\$0	\$0	\$0
Support Services Costs - included in implementation or support	\$0	\$0	\$0	\$0	\$0	\$0
Total M&O Cost	\$256,192	\$107,088	\$107,088	\$107,088	\$107,088	\$684,544

Total NSD Costs						\$1,207,390

NOTES:

1. On all worksheets, the Bidder must not enter data into any field that is shaded grey.
2. It is the responsibility of the Bidder to ensure calculations are correct.
3. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.

NSD Bidder Software Costs																																																												
Edupoint Educational Systems																																																												
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NOTES:

1. The Bidder shall describe all proposed software indicating manufacturer, brand name, module name and version number for the items being proposed.
2. An enterprise licenses is a single single software license for all enterprise users.

3. In addition to Enterprise licenses, the Bidder may propose different software license types for NSD consideration.
4. All costs associated with the purchase, delivery, installation, and production of the SSI software components shall be loaded into the Unit Cost column. The Bidder may provide an alternative costing approach based on cost drivers such as lease or usage, but shall still commit to a firm fixed annual cost.
5. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.
6. Information provided in the worksheets should be consistent with the response elsewhere in the Bidder's proposal.
7. For Bidders proposing a any new development components for the SIS, costs associated with development shall be included in this worksheet.

NSD Bidder Hardware Costs
Edupoint Educational Systems

Hardware Costs											
Hard-ware Item #	Hardware Item	Per Unit Cost	Quantity	Total One-time Costs	YR 1 M&O	YR 2 M&O	YR 3 M&O	YR 4 M&O (estimated)	YR 5 M&O (estimated)	Total Ongoing Costs	Total Costs
1	P/Tr/Te - Database Server	\$23,716	1	\$23,716	inc	inc	inc	inc	inc	\$0	#####
2	Staff Web Server	\$4,180	4	\$16,720	inc	inc	inc	inc	inc	\$0	#####
3	Process Server	\$4,180	2	\$8,360	inc	inc	inc	inc	inc	\$0	\$8,360
4	Parent/Student Web Server	\$4,180	1	\$4,180	inc	inc	inc	inc	inc	\$0	\$4,180
5	Test Web / Process Server	\$4,180	1	\$4,180	inc	inc	inc	inc	inc	\$0	\$4,180
6	Load balancer	\$6,000	1	\$6,000	inc	inc	inc	inc	inc	\$0	\$6,000
7	SSL Certificate	\$660	1	\$660	inc	inc	inc	inc	inc	\$0	\$660
	P/Tr/Test - Switch	\$1,650	2	\$3,300	inc	inc	inc	inc	inc	\$0	\$3,300
Total Hardware				\$67,116	\$0	\$0	\$0	\$0	\$0	\$0	#####

Hardware Specifications						
Hard-ware Item #	Hardware Item	ment (e.g., Dev, Q1, Q2, Training, Stage, Production)	Manu- facturer	Detailed Description (e.g., number of processors, amount and type of storage and memory, type of network card)	Operating System	Earliest Proposed Purchase Date
1	Database server	P/Tr/ Test	Dell	Dell PowerEdge R820, 2 x Eight Core Intel Xeon E5-4640 2.40GHz, 96GB Memory, OS 2x146GB 15K Harddrive Raid1, Data 10 x 300GB 15K Harddrive Raid10		
2	Staff Web Server	P	Dell	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid1		
3	Process Server	P	Dell	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid2		
4	Parent/Student Web Server	P	Dell	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid3		
5	Test Web / Process Server	test	Dell	Dell PowerEdge R420 2 x Intel Xeon Quad-Core 2.2 GHz, 8GB Memory, 2x146GB Harddrive Raid4		
6	Load balancer	P	Kemp	Kemp loadmaster 2600		
7	SSL Certificate	P		Thawte ssl cert		
8	Switch	P/Tr/Test		Dell PowerConnect 5548 Switch, iSCSI, 48GbE PortsManaged Layer 2		

Notes:

1. The Bidder shall describe all proposed hardware.
2. All costs associated with the purchase, delivery to the NSD-specified site, licenses (e.g., operating system) of the hardware shall be loaded into the Per Unit Cost. The Bidder shall be responsible for the risk of loss or damages that occur during delivery of the equipment.
3. Costs shall include all environments (e.g., development, testing, training, pre-production, and production).

4. The Bidder may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.
 5. All hardware/software and associated warranty and maintenance documents may be purchased in NSD name. In such a case the Bidder must provide to NSD all documentation related to hardware/software purchases including, but not limited to invoices, packing slips, license agreements, and other details that may be required for audit and accounting.
 6. Hardware Items in the Hardware Costs table shall correspond to the Hardware Items in the Hardware Specifications table.
- Edupoint Note** - This is our standard hardware pricing using our hardware calculators to determine sizing requirements based on district enrollment and staff count. This option is not VMware or fully redundant. Edupoint has provided an optional hardware pricing section which shows the cost for a virtualized data center with full redundancy.

NSD Bidder Design, Development and Implementation C Edupoint Educational Systems	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days
Project Management and Planning	
Project Management Plan	24
Communications Management Plan	inc
Project Charter	inc
Change Management Plan	inc
Weekly Written Progress Reports	inc
Monthly Status Reports	inc
Contract Close-out Action List and Deliverables	inc
<i>Project Management Execution Activities</i>	inc
Total Project Management Deliverables and Activities	24
Technical Environment Installation and Configuration	
Specifications for all necessary hardware, software and tools	2 days
Technical Infrastructure Description (including hardware and system software and tools)	inc
Environment Configuration Manual	inc
Source code and object (executable) code	ST priced as option; not included
<i>Technical Environment Installation and Configuration Activities</i>	inc
<i>Insert as proposed</i>	
Total Environment Installation and Configuration Deliverables and Activities	2
Business Process Change Management	
Business Process Management Plan	12 days
<i>Business Process Management Activities and Outcomes</i>	inc
<i>Insert as proposed</i>	

NSD Bidder Design, Development and Implementation C Edupoint Educational Systems	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days
Total Business Process Change Management Deliverables and Activities	12
Knowledge Transfer and Training	
Knowledge Transfer and Training Plan	32 days
Training Documentation	inc
Training Course Outline	inc
Training Packages and Materials	inc
Training Manuals	inc
Updated Training Documentation	inc
<i>Knowledge Transfer and Training Activities</i>	inc
<i>Insert as proposed</i>	
Total Knowledge Transfer and Training Deliverables and Activities	32
System Development - Design, Configuration, Development and Customization	
Systems Engineering Management Plan	not included - see assumptions
Design and Development Plan (Software Development Plan)	not included - see assumptions
Business Continuity Plan	inc
Test Plan	inc
Testing Tools, Test Configurations, and Related Documentation	inc
Test Scripts, Test Results and Quality Reports	inc
Problem Resolution Management Plan	inc
Problem Resolution Tracking System	inc
<i>System Development Activities - Standards Based Report Cards customization only</i>	8

NSD Bidder Design, Development and Implementation C Edupoint Educational Systems	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days
<i>Application and Security Set-up</i>	
	14 days
Total System Design, Development and Customization Deliverables and Activities	22
System Installtion and Implementation	
Implementation Plan	inc
Performance and Capacity Plan	inc
Operational Recovery Plan	inc
Interface Management Plan / Design Description	inc
Interfaces Outcomes	inc
Software Configuration Management Plan and System	inc
Requirements Management Plan	not included- see assumptions
Requirements Traceability Matrix	not included -see assumptions
On-site Implementation Support Plan	inc
Pre-Implementation Readiness Assessment	inc
Production Release Plans	not included - see assumptions
Lessons Learned Document	not included - see assumptions
NSD Deployment at NSD Location	inc
<i>System Installtion and Implementation Execution Activities</i>	
<i>Data Conversion - 3 years of data</i>	9 days
Total Implementation Deliverables and Activities	9

NSD Bidder Design, Development and Implementation C Edupoint Educational Systems	
Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days
Security	
System Security Plan	included in application and security set-up/configuration
<i>Insert as proposed</i>	
Total System Security Deliverables and Activities	0
Quality Management	
Quality Management Plan	5 days
<i>Quality Management Activities</i>	
<i>Insert as proposed</i>	
Total Quality Management Deliverables and Activities	5
Production Support and Transition	
Production Support and Transition Plan	5 days
Maintenance Activity Report	
System Operation Manual	inc
System Documentation	inc
Disaster Recovery Plan	inc
System Administration Procedures	inc
Help Desk Plan (Business and technical)	inc
Help Desk Scripts and Decision Trees	not included
System Acceptance Document	inc

NSD Bidder Design, Development and Implementation C
Edupoint Educational Systems

Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days
Maintenance and Operations (M&O) Plan	inc
<i>Production Support and Transition Activities</i>	
<i>Insert as proposed</i>	
Total Production Support and Transition Deliverables and Activities	5
Interfaces	
Interface Development Activities	4 days
<i>Annual Systems Review Service</i>	4 days
<i>Not to exceed travel cost</i>	
Subtotal	8
Total System Implementation Costs	119

NSD Bidder Design, Development and Implementation C Edupoint Educational Systems

Vendor Must Break Out Cost of Project Deliverables	
Description of Deliverable	Vendor Total Level of Effort - Man-Days

NOTES:

1. The Bidder shall identify all proposed deliverables being provided and any other one time costs not captured in the detailed hardware and software costs. Proposed deliverables must include each of the deliverables defined in the worksheet above plus additional deliverables that the Bidder recommends.
2. All tasks associated with the services proposed for NSD shall be included in the total cost for that service.
3. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.

NSD Bidder Support Costs															
Edupoint Educational Systems															
Maintenance and Operations (M&O)															
Bidder M&O Support Costs	M&O Costs														
	Number of hours	Hourly Rate	YR 1 M&O	Number of hours	Hourly Rate	YR 2 M&O	Number of hours	Hourly Rate	YR 3 M&O	Number of hours	Hourly Rate	YR 4 M&O Estimate	Number of hours	Hourly Rate	YR 5 M&O (Estimate)
Staff Position															
Project Manager			\$0			\$0			\$0			\$0			\$0
Business Analyst			\$0			\$0			\$0			\$0			\$0
Data Base Administrator			\$0			\$0			\$0			\$0			\$0
Network Administrator			\$0			\$0			\$0			\$0			\$0
Trainer			\$0			\$0			\$0			\$0			\$0
Help Desk			\$0			\$0			\$0			\$0			\$0
Total			\$0			\$0			\$0			\$0			\$0

EDUPOINT NOTE - this spreadsheet does not apply to our business model. The service delivery days and rates are charged in Year 1 when the implementation occurs based on the A3-7 payment schedule. There is no expected additional service costs for the project in years 2-5 beyond software maintenance.

- NOTES:
- 1. The Bidder shall describe all proposed Bidder-provided support services items.
 - 2. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.
 - 3. M&O costs will be paid monthly in arrears.

NSD Bidder Labor Rates Edupoint Educational Systems					
Staff Position	Compo-site Weight %	Daily Rate	Compo-site Rate	Senior/Junior	Bidder or Subcontractor Name
Project Manager	See below....	\$1,500			Edupoint
Technical Lead		\$1,200			Edupoint
Functional Lead		\$1,200			Edupoint
Transition/Deployment Lead		\$1,200			Edupoint
Training Lead		\$1,500			Edupoint
Change Management Lead		\$1,200			Edupoint
Trainers		\$1,200			Edupoint
Help Desk		\$1,200			Edupoint
Other		\$1,200			Edupoint
Composite Rate					

Note - These are the Edupoint's general daily rates by job type. Edupoint prices its services by number of days by TASK as outlined in our Edupoint pricing detail pages. These rates have not been allocated across the project by role. Our implementation services pricing is included in Tab 4A-4 DDI Service Costs. For detail on the number of days, by role, by implementation task, please refer below.

Notes:

1. Use the tables on this worksheet to provide Bidder/subcontractor hourly labor rates for the various classifications and grades of project personnel.
2. Bidder/subcontractor hourly labor rates must be inclusive of all travel, per diem, and any other related expenses.
3. The Bidder may include additional Staff Position titles to accurately represent the classifications it uses for describing the various classifications and grades of its Projects personnel, but it must include at a minimum all Key Positions listed in the tables above.
4. If the Bidder's existing titles differ from those listed for projects, it must map its titles to the listed categories to the extent possible and provide its mapping reference in Form A3-8, Pricing Assumptions Worksheet.

5. Bidders may insert additional rows as required for projects. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.

6. The Composite Rate Percentages for projects shall correspond to the associated Staff Position level of effort and the total must equal 100%.

7. Individual and composite hourly rates shall not increase greater than 5% per year.

IMPLEMENTATION SERVICES BY TASK	Required Days/Units	Unit Price	List Price	Discount Percent	Discount Amount	Net Price
Project Management/Technical Leadership			\$37,350			\$31,747
- Executive	3	\$1,950	\$5,850	0.15	-\$878	\$4,972
- Senior Technical or Subject Matter Experts	21	\$1,500	\$31,500	0.15	-\$4,725	\$26,775
- Support Staff / Project Support	0	\$1,200	\$0	0.15	\$0	\$0
Installation, Configuration, Hardware & System Software			\$3,000			\$2,550
- Senior Technical or Subject Matter Experts	2	\$1,500	\$3,000	0.15	-\$450	\$2,550
- Managers and Specialists	0	\$1,200	\$0	0.15	\$0	\$0
Application and Security Setup			\$20,700			\$17,595
- Senior Technical or Subject Matter Experts	13	\$1,500	\$19,500	0.15	-\$2,925	\$16,575
- Managers and Specialists	1	\$1,200	\$1,200	0.15	-\$180	\$1,020
Report Card Forms Setup			\$9,900			\$8,415
- Senior Technical or Subject Matter Experts	1	\$1,500	\$1,500	0.15	-\$225	\$1,275
- Developers	7	\$1,200	\$8,400	0.15	-\$1,260	\$7,140
Data Conversion for 3 Years			\$11,100			\$9,435

- Senior Technical or Subject Matter Experts	1	\$1,500	\$1,500	0.15	-\$225	\$1,275
- Managers and Specialists	8	\$1,200	\$9,600	0.15	-\$1,440	\$8,160
- Developers	0	\$1,200	\$0	0.15	\$0	\$0
- Support Staff / Project Support	0	\$1,200	\$0	0.15	\$0	\$0
External Interface/Integrations			\$5,100			\$4,335
- Senior Technical or Subject Matter Experts	1	\$1,500	\$1,500	0.15	-\$225	\$1,275
- Managers and Specialists	3	\$1,200	\$3,600	0.15	-\$540	\$3,060
- Developers	0	\$1,200	\$0	0.15	\$0	\$0
Training (Train-The-Trainer)			\$48,000			\$40,800
Student Information						
- Certified Classroom Training	26	\$1,500	\$39,000	0.15	-\$5,850	\$33,150
Gradebook						
- Certified Classroom Training	4	\$1,500	\$6,000	0.15	-\$900	\$5,100
Master Schedule Builder						
- Certified Classroom Training	2	\$1,500	\$3,000	0.15	-\$450	\$2,550
Process Consulting			\$14,400			\$12,240
- Follow up and Support Training	6	\$1,200	\$7,200	0.15	-\$1,080	\$6,120
- Coaching and Mentoring	6	\$1,200	\$7,200	0.15	-\$1,080	\$6,120
Testing / Quality Assurance			\$6,300			\$5,355
- Senior Technical or Subject Matter Experts	1	\$1,500	\$1,500	0.15	-\$225	\$1,275
- Managers and Specialists	4	\$1,200	\$4,800	0.15	-\$720	\$4,080
Support and Maintenance			\$6,600			\$5,610
- Senior Technical or Subject Matter Experts	2	\$1,500	\$3,000	0.15	-\$450	\$2,550

- Managers and Specialists	3	\$1,200	\$3,600	0.15	-\$540	\$3,060
SUB-TOTAL - IMPLEMENTATION SERVICES			\$162,450	0.15	-\$24,368	\$138,082

NSD Bidder Payment Schedule
Edupoint Educational Systems

Please note that Edupoint's payment schedule is defined in our software license agreement and milestone payments for implementation service costs will be based on the Edupoint implementation model phases.

Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start) Assumes 2/1/14 Start Date	Deliverable Group Payment - See Note Above
PLANNING PHASE	Project Planning - Project Charter. Initial Project Plan. Issues Log. Risk Log. Change Request Log. Resource Plan. Communication Plan. Testing Strategy.	Estimated Completion Date of 3/14/14	40.00%
PREPARATION PHASE	Installation - Configured test, train and production environments. Synergy installed. Enterprise hardware and infrastructure plan. Review of Backup / Disaster recovery procedures.	Estimated Completion Date of 3/12/14	20.00%
	Application Setup and Business Process Review - Documented setup decisions. Gap analysis (Note that no customization has been proposed as part of this response.). Results of business process review.	Estimated Completion Date of 5/2/14	
	Training for Trainers and Core Team - Synergy application training events conducted.	Estimated Completion Date of 4/10/14	
TESTING PHASE	Data Conversion - Data extracted from legacy SIS. Data conversion iterations completed. Data validated and accepted. Includes data conversion plan, conversion training event, converted data and data exception reports.	Estimated Completion Date of 7/29/14	20.00%
	External 3rd party Interfaces - Requirements gathered and design docs completed. Interfaces developed. Interfaces tested and accepted.	Estimated completion date of 7/25/14	
	Testing and Quality Assurance - Mini Application Reviews completed. Data Validation review completed. Test plans and use cases delivered. Performance and go-live readiness system tests conducted.	Estimated completion date of 7/7/14	

NSD Bidder Payment Schedule
Edupoint Educational Systems

Please note that Edupoint's payment schedule is defined in our software license agreement and milestone payments for implementation service costs will be based on the Edupoint implementation model phases.

Deliverable Groups	Deliverable (minimum project deliverables)	Estimated delivery time (in months from planned project start) <i>Assumes 2/1/14 Start Date</i>	Deliverable Group Payment - <i>See Note Above</i>
DEPLOYMENT	Standards Based Report Card Development - delivery of 14 SBRCs based on NSD requirements.	Estimated completion date of 6/1/14	15.00%
	Deployment - Production environment updated. Application and security setup decisions reflected within Synergy. System documentation posted. End user training conducted (by NSD).	Estimated completion date 7/31/14	
SUPPORT/ POST DEPLOYMENT	Maintenance / Support - Turnover to Edupoint CRC for technical/ customer support. NSD help desk supporting Synergy users. Technical and end user support plans. System maintenance and upgrade plan.	Estimated completion date of 8/4/14	5.00%
	Total		100.00%

Please note that Edupoint's payment schedule is defined in our software license agreement and milestone payments will be based on the Edupoint implementation model phases.

NOTES:

1. Bidders may insert additional rows as required. It is the responsibility of the Bidder to ensure spreadsheet calculations are correct.

NSD Bidder Pricing Assumptions
Edupoint Educational Systems

Item #	REFERENCE (Section, Page, Paragraph)	Description	Rationale	Cost Impact if the Assumption Turns out Not to be Valid
1	A8-3 Hardware costs	Edupoint has proposed our base hardware in the base pricing.	Vmware and full redundancy are not requirements to run Synergy, therefore pricing for these options are provided as an option within the Edupoint price proposal.	Refer to pricing options to understand difference in pricing.
2	A8-4 DDI Service costs	Edupoint has proposed Synergy as a COTS solution without customization.	Synergy meets the vast majority of NSD's requirements out-of-the box. Items that are not met today could be developed via customization by either NSD using the ST Toolkit and Synergy application source code, or by Edupoint. Further discussion and scope efforts would be required to understand the nature of the customizations in order to provide accurate firm-fixed pricing.	No cost impact.
3	A8-2 Software Costs	Software is an enterprise wide Synergy perpetual license.	RFP requirement and lowest TCO for NSD	No cost impact.
4	A8- 4 DDI Service costs	Customization for 14 standards-based report cards included.	This assumes 2 versions (languages) for grades K-6 (7 grade levels).	If additional custom standards-based report cards are needed, these can be developed at a cost of \$600/each.
5	A8-1	Edupoint has done it's best to reflect its pricing in the format desired within these tabs. That said, column tabulations in some areas were not working, or pulling from the wrong tables, and have been updated to present accurate pricing for NSD consideration.	Form modifications made to allow NSD to utilize this pricing tool to evaluate Edupoint costs.	No cost impact.
6	A8-4 DDI Service costs	3 years of data conversion have been priced in this proposal.	This question was asked prior to proposal submission and based on the NSD response, this was our logical assumption.	n/a

8	A8-5 Support Service Costs	This spreadsheet does not apply to our business model. The service delivery days and rates are charged in Year 1 when the implementation occurs based on the A3-7 payment schedule. There is no expected additional service costs for the project in years 2-5 beyond software maintenance.	Edupoint's helpdesk services and software maintenance are covered under the software maintenance agreement and not based on an as-need, role-based service delivery. Software maintenance is included on A8-2 per the pricing spreadsheet.	No cost impact.
9	A3-7 Payment Schedule	As indicated this schedule defines the implementation services outlined in A8-4 DDI Services. Edupoint proposes it's standard payment schedule which is milestone based and includes 40% at the end of the planning phase, 20% at the end of the preparation phase, 20% at testing phase, 15% at deployment phase, and 5% at the support/post deployment phase completion. Other payments, including initial perpetual license as well as annual maintenance payments are not outlined on this tab, but are outlined in the Edupoint license agreement.	Edupoint's payment schedule is defined in our standard license agreement which can be found in the Cost Proposal section.	No cost impact.
10	A37	System Implementation and Testing lists a pilot in this section. Edupoint has not proposed a pilot in our proposal due to the relatively short timeline for deployment (Feb-August); however Edupoint's plan includes sufficient testing to ensure go-live readiness.	Edupoint anticipates a Feb award date and an August go-live which shortens the timeframe to accomplish the implementation project such that a pilot is not advised.	No cost impact.
11	General	Edupoint has included the cost of travel and expenses in this price form, on A8-4 at the bottom. It is a separate line item and is considered a not-to-exceed number. Actual expenses will be billed as incurred based on GSA guidelines.	Edupoint bills for travel and expenses separately from labor rates.	No cost impact.
12				
13				
14				
15				

Notes:

1. Pricing shall be based on NSD provided Contract terms and conditions and Mandatory Requirements of the RFP (not the Bidder's exceptions to the Contract Terms and Conditions). The Bidder is required to state all Pricing Assumptions upon which its pricing is being determined. Insert as many lines as necessary. Assumptions shall not conflict with Contract terms and conditions or Mandatory Requirements of this RFP.

2. The Bidder shall provide pricing consistent with the following:

- Apply the pricing in accordance with the Contract Terms and Conditions and Mandatory Requirements of the RFP.
- Clearly identify and explain all of the pricing assumptions made, upon which pricing is predicated including the cost/pricing impact if the assumption turns out not to be valid.
- State if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.

NSD Bidder Supplemental Cost Information Edupoint Educational Systems	
1.	Discuss software pricing methodology. Describe items such as license cost per seat, per named user, per module, per server, per site/organization. Provide your definition of how you determine a seat, named user, site/organization, etc.
	Synergy is licensed on a district-wide basis using student enrollment. This is a perpetual license which is not limited by seat, user or site. Modules priced are outlined in this cost form and in the detail pricing pages provided as part of the Edupoint price proposal.
2.	Describe how you price software installed in various environments (e.g., development, testing, training, disaster recovery, operational).
	There is no additional cost to license and install Synergy for development, test, training, production or other environments within and in support of NSD.
3.	Provide a description of your strategy for maintenance agreement pricing after the initial term of the maintenance agreement has ended or after additional software has been licensed.
	Edupoint's price proposal detail includes a firm fixed priced maintenance cost for years 1-5. Edupoint will not increase annual maintenance more than 3% year-to-year thereafter. Maintenance prices are adjusted as additional software is licensed - for example, should NSD decide to implement Synergy Special Education in year 3, the Synergy SE maintenance cost would be based on then current license/ maintenance cost. Optional solutions proposed in this proposal contain pricing valid for 12 months.
4.	Please describe your proposed framework for compensation addressing a risk/reward mechanism (i.e. indicate how you should be paid based on performance and completion of deliverables).
	Edupoint has provided a firm-fixed price bid in response to the NSD RFP, and as such we will expend the resources necessary, even if they exceed the number of days scoped in our pricing, to ensure a successful project completion. The payment schedule is outlined within this document and in the Edupoint software license agreement. Edupoint's payment schedule is milestone based and inherently addresses a risk/reward model in that NSD will only pay for services that are delivered and accepted.
5.	Describe your proposed approach and cost structure for change orders. Describe the cost structure for any ongoing service requests made by NSD.
	The change management process is used to capture change orders as outlined in the Implementation Services overview of this proposal. Both parties must agree to any change in scope and sign-offs with firm costs are required to implement any change. The cost structure for changes will be based on the Labor Rates provided within this proposal.
6.	What additional early payment discounts are offered?
	Edupoint will provide a 3% early payment discount on pre-paid years of support.
7.	Please describe your proposed cost containment framework for expenses and how you have built efficiencies into your project plan.

Edupoint recognizes the importance of cost containment on projects of this size and scope and has proposed a solution which is designed to provide NSD substantial savings in both the near term and over the total life of the solution. Edupoint has provided deeply discounted (60%) perpetual licenses for the Synergy suite, as well as a 15% discount on the implementation services proposed.

Other cost savings for NSD include:

- Edupoint has provided 15% implementation discount and included all costs for travel in our service fees. There will be no hidden or exorbitant travel costs as part of the service delivery.
- This is firm, fixed-price proposal, and as such all license, implementation services and ongoing maintenance costs are fixed. Edupoint has a 100% on-time, on-budget implementation track record, so NSD can be assured that the implementation timeline proposed will be delivered.
- Edupoint invests heavily in research and development and is continually evolving our Synergy Education Platform feature set to meet the ever-growing and changing needs of the K-12 partners we serve. For NSD this means that the Synergy solution will continue to be enhanced and new features to licensed solutions will be provided at no cost to NSD as part of annual maintenance/support.
- Edupoint's proposal includes the optional Synergy Technology (ST) Developers Toolkit and the Synergy application source code. ST changes the relationship between NSD and Edupoint from one of dependence to one of partnership. NSD has the security provided by owning source code, combined with the power that comes from operating a best-of-breed COTS (Commercial Off the Shelf) solution. NSD can continue to heavily customize the Synergy (should it choose to do so), or if preferred, operate Synergy as a COTS solution without extensive customization because Synergy meets the vast majority of the district's needs out-of-the-box today.

Other less quantifiable, but perhaps just as significant, long term cost savings provided by the Edupoint/Synergy solution include:

- o Synergy will streamline administrative processes and save NSD staff time. From online registration, to easily accessing and reporting data at every level, including teachers in the classroom, the time savings results in more efficient operations. For teachers, this translates into more time with students.
- o Synergy can provide electronic (opt-in) delivery of report cards and progress reports - via email and ParentVUE/StudentVUE web portals and mobile apps - saving NSD the expense of processing and mailing traditional report cards.
- o Teacher web sites, included in the Synergy solution, may allow NSD to replace the current systems in use by NSD today, resulting in fewer systems to license, maintain and support.
- o Online registration tools will save substantial office / registrar time and streamline the traditional heavy paperwork/data entry process for new and transferring students.
- o Built-in data analysis tools provided within the teacher gradebook, provides extensive real-time insight to guide instruction, without any additional work required by teachers, and without the need for an additional data analysis tool.
- o Mobile applications, provided for teachers, administrators, nurses/health staff, parents and students provide real-time access to data, from low-cost mobile devices. For Synergy users – teachers, administrators, nurses – our apps are designed to support operation, not just provide simple read-only access.

8. Please describe any additional discounts/incentives available to NSD which will minimize the Total Cost of Ownership for the Student Information System Solution.

Edupoint has reduced its ongoing maintenance fees by 15% providing significant ongoing savings in the long term.

9. Please clearly identify and explain all the assumptions (Tab Pricing Assumptions) upon which your software license and maintenance fees, implementation costs and approach are predicated. Please also state if any charge is subject to special conditions, and clearly specify those conditions and quantify their impact upon the charges.

Edupoint has included its pricing assumptions on the pricing assumptions tab.

EDUPOINT SOFTWARE LICENSE AGREEMENT

SUBSCRIPTION

Version 17.1

This Edupoint Software License Agreement ("**Agreement**") is made between Edupoint Educational Systems, LLC located at 101 Pacifica, Suite 240, Irvine CA ("**Company**") and Highline Public Schools, with offices located at 15675 Ambaum Blvd SW, Burien, WA 98166 ("**Licensee**").

RECITALS

- A. Company has developed certain proprietary educational information software systems and documentation thereof which are updated and extended by Company at Company's sole discretion (the "**Edupoint Product**"), and Company has licenses from third parties or developed other products and services which are offered by Company and updated and extended by Company at Company's sole discretion (the "**Edupoint Value Add Products**"). The Edupoint Product and the Edupoint Value Add Products are collectively referred to as the "**Edupoint Products**".
- B. Company or a Company authorized licensor makes the Edupoint Products available to Licensees through the payment of an annual fee (the "**Subscription License**").
- C. Company or a Company authorized licensor / service provider provides Licensees with the use of the Edupoint Products via one of the following operating models:
 - Self-Hosting, wherein the Licensee, with Company's assistance and support, installs the Edupoint Products in the Licensee's data center and assumes total responsibility for providing all data center infrastructure and computing resources and administering the Edupoint Products.
 - Company or authorized service provider provides application hosting services via one of the following models;
 - Local Application Hosting, wherein the computing resources necessary to run the Edupoint Products are provided and administered by Company, but located within Licensee's local data center.
 - Remote Application Hosting, wherein all computing resources necessary to make the Edupoint Products' enabled services available to the Licensee's end users are located at a Remote Data Center of the Company's choosing.
- D. Company or a Company authorized service provider provides certain software support services for the Edupoint Products, including software maintenance, and electronic and telephonic responses to Licensee's technical and product questions, (the "**Software Support Services**").
- E. Company or a Company authorized service provider provides certain implementation services for the Edupoint Products, including project management, installation and configuration, application and security setup, data conversion, external interfaces, training, establishing an internal testing and quality assurance program, setting up the support and maintenance program for the Licensee, process consulting, and custom development, (the "**Implementation Services**").
- F. Company and Licensee desire to enter into this Agreement so that Licensee may acquire the rights to use Edupoint Products and receive the enabled services via one of the three (3) operating models defined in Recital C above, as well as the Software Support Services, and Edupoint Implementation Services, (collectively the "**Edupoint Services**"), subject to the terms and conditions of this Agreement.

NOW, THEREFORE, for and in consideration of the terms and conditions hereinafter stated, it is agreed as follows:

1.0 Grant of License

1.1 Type of License

Subject to the terms and conditions hereof, Company agrees to grant Licensee a non-exclusive, non-transferable, non-sub-licensable, right and license to the Edupoint Products identified on Exhibit A. Licensee shall use the Edupoint Products solely for its own internal use and for the purposes for which such Edupoint Products were designed.

1.2 Additional Terms and Conditions

In addition to the terms of this Agreement, the license granted under Section 1.1 above shall be subject to the terms and conditions of all Exhibits and Attachments listed as applicable under Section 14.0 and attached hereto and incorporated herein.

2.0 Ownership and Protection of Edupoint Products

2.1 Title: Ownership

Licensee acknowledges that the Edupoint Products; all source code, object code, user interface, algorithms, development frameworks, system designs, system logic flow, and processing techniques and procedures related thereto; the documentation, any system user documentation, or other documentation related thereto; any copies and derivatives of any of the foregoing, in whole or in part; as well as all copyright, patent, trademark, trade secret and other proprietary rights in any of the foregoing; are and shall remain the sole and exclusive confidential property of Company or Company authorized licensor.

2.2 Confidential and Valuable Substance

Licensee recognizes that the Edupoint Products and documentation have substantial monetary value and are considered TRADE SECRET, PROPRIETARY, and/or CONFIDENTIAL, (the “**Confidential Information**”). Company is desirous of maintaining rigorous control over the Edupoint Products and documentation. Licensee, therefore, agrees that it will exercise due care to prevent disclosure of the Edupoint Products and documentation to any third party.

2.2.a Licensee shall ensure that any identification labels or legal notices contained in or on any of the Edupoint Products and documentation are not altered, modified, suppressed, or in any other way made inconspicuous.

2.2.b Licensee shall restrict access to the Edupoint Products and documentation to only those employees of the Licensee who must have such access in order to perform their specific duties or obligations pursuant to the Licensee’s business. Licensee agrees to take all necessary and proper precautions to ensure that unnecessary and unauthorized access to the Edupoint Products and documentation by its employees does not occur.

2.2.c Licensee agrees that it will take all reasonable precautions to ensure that non-Licensee personnel, including non-employee agents of Licensee, do not obtain access to or knowledge of the Confidential Information without first obtaining the express written consent of Company. See Attachment 4. Company agrees that it will not unreasonably withhold such consent.

2.2.d Licensee shall treat the ideas and expressions contained in the Edupoint Products and documentation as Confidential Information and belonging solely to Company and shall not, without the prior written permission of Company, copy or duplicate any physical embodiments of the Edupoint Products and documentation (except as required for security and archival or escrow purposes). This includes, but is not limited to, videos or other materials containing images of Company products on video sharing websites, social media platforms or on unrestricted district websites.

2.2.e Licensee agrees to notify Company immediately, in writing, of any unauthorized possession, use, or disclosure of any of the Edupoint Products or documentation. Licensee shall promptly furnish Company with full details of such possession, use, or disclosure; assist in preventing any recurrence thereof; and cooperate with Company in any litigation or other proceedings deemed necessary by Company to protect Company’s rights. Licensee further acknowledges that any reports or other data generated by the Edupoint Products regarding traffic flow, system loads and/or product installation are the exclusive property of Company and may be used, and Licensee hereby specifically authorizes the use of such reports and/or other data, by Company in any manner that it deems to be appropriate.

2.3 Protection of Edupoint Products

Licensee shall not allow, and shall not allow any third party to:

- 2.3.a Adapt, modify, change, maintain, translate, decompile, disassemble, reconstruct, or reverse engineer the Edupoint Products, or any portion thereof;
- 2.3.b Identify or discover any source code of the Edupoint Products;
- 2.3.c Distribute, sell or sublicense copies of the Edupoint Products or any portion thereof;
- 2.3.d Create copies of the Edupoint Products except to make a copy which is required as an essential step in its utilization for the purposes granted the Licensee or to make an archival or back-up copy of the Edupoint Products and documentation; or
- 2.3.e Incorporate any portion of Edupoint Products into or with any other Edupoint Products or other products, or create any derivative works of the Edupoint Products.

3.0 Payment

3.1 Payment Terms

Licensee will pay Company or Company's authorized licensor the License Fees as provided in Exhibit A. All payments are due within 30 days of the invoice date.

3.2 Taxes

All amounts set forth for payment are exclusive of applicable sales and similar taxes. Licensee agrees to pay any and all amounts equal to any taxes resulting from the licensing of the Edupoint Products or the services to be performed pursuant to this Agreement, exclusive of taxes based on the net income of Company.

4.0 Indemnification and Warranty

4.1 Indemnification

- 4.1.a If Licensee notifies Company in writing and gives Company sole control over the defense and all related settlement negotiations, Company will defend, hold harmless and indemnify Licensee against any damages finally awarded or amounts paid in settlement as a result of any claim or threat of claim brought by a third party against Licensee to the extent the claim or threat of claim is based on an allegation that: (i) Edupoint Products which Licensee has licensed from Company infringes any U.S. patent, copyright, trademark, trade secret or other proprietary right of a third party, or (ii) defective Edupoint Products directly caused death or personal injury; provided that Licensee did not alter, modify, or otherwise change the Edupoint that gave rise to such claim or (iii) any Company breach of Section 9.7; or (iv) any claim or threat of claim brought by a third party against Licensee arising out of the acts or omissions of Company or its employees.
- 4.1.b To the extent permitted by law, Licensee will defend, hold harmless and indemnify Company against any claim or threat of claim brought by a third party against Company arising out of the acts or omissions of Licensee or its employees, excluding acts or omissions expressly required or prescribed by this Agreement.
- 4.1.c If either party seeks indemnification provided for in this Section 4.0, each party seeking indemnification will cooperate with and provide reasonable assistance in the defense or settlement of any claim or legal proceeding. Licensee and Company will not make public any terms, or the mere existence, of any settlements.
- 4.1.d The foregoing states the entire liability and obligation of Company with respect to any infringement or claims of infringement by the Edupoint Products or any part thereof, of any patent, copyright, trade secret or other proprietary right.

4.2 Warranty

4.2.a Operational Warranty

Company warrants that, during the one hundred eighty (180) day period (the “Warranty Period”) commencing on the date the Licensee places the Edupoint Products into production for either pilot or general deployment, whichever first occurs, the Edupoint Products will operate in substantial conformity with the documentation when used in strict compliance therewith, and if properly installed on computing resources within a datacenter infrastructure that is consistent with Company’s published Hardware and Software Requirements and Data Center Infrastructure Requirements. This warranty is contingent upon installation of all corrections, enhancements, updates and new releases provided by Company to Licensee and the absence of damage or abuse to the Edupoint Products by Licensee.

4.2.b Breach of Operational Warranty

Notwithstanding the foregoing, Licensee acknowledges that it is solely responsible for having the appropriate compatible data center infrastructure, including but not limited to telecommunications network(s), environmental control systems, security systems, electrical services, cabinets and racks, competent network administrative staff available for Licensee Self Hosting or Local Application Hosting Services. Licensee acknowledges that if it elects Self Hosting as its operating model, it is also solely responsible for having the appropriate computing resources fully installed and operational within its data center and that these computing resources and the data center in which they are installed are consistent with Company’s published Hardware and Software Requirements, and that any exceptions that are not approved in advance in writing by the Company will invalidate the operational warranty.

As Licensee’s sole and exclusive remedy for any breach of this warranty, Company shall, at its sole option, within a reasonable period of time, provide all reasonable software development services to correct software errors in the Edupoint Products, replace the Edupoint Products or terminate this Agreement and refund to the Licensee the license fees paid to Company under this Agreement for the defective Edupoint Products, as set forth in section 7.2(c) of this agreement, refunding the unamortized portion (assuming straight line amortization) of the license fees paid. Any Software Support or Implementation Services provided under this Agreement are provided “as is” without representation or warranty of any kind or nature.

4.2.c Replacements or corrections of Edupoint Products shall be subject to the warranties, warranty remedies and warranty limitations or disclaimers set forth in the License Agreement pursuant to which Licensee acquired the original Edupoint Products for the period designated therein.

4.2.d Limitations

Except as expressly set forth in this Section 4.0, Company makes no warranty or representation, either express or implied, including, but not limited to, any implied warranties of merchantability or fitness for a particular purpose, and any warranties of quality or performance, or as a result of a course of dealing or usage of trade, with respect to the Edupoint Products and any Edupoint Services.

5.0 Assignment

So long as the license warranty period under this Agreement is in effect, the services to be performed by Company are personal in character and neither this Agreement nor any duties or obligations hereunder may be assigned or delegated by Company unless first approved by Licensee by written instrument executed and approved in the same manner as this Agreement. Notwithstanding the foregoing, Company may assign this Agreement or its rights, interest or obligations under this Agreement to a successor in interest to Company, whether by way of asset sale, merger or other transfer of Company or its business, without Licensee's consent. Subject to the foregoing, all covenants, representations, warranties and agreements of the parties contained in this Agreement shall be binding on and inure to the benefit of the parties' respective heirs, executors, administrators, personal representatives, successors and permitted assigns.

6.0 Choice of Law

This Agreement shall be governed by, interpreted under and construed in accordance with the internal laws of the State of California, without reference to the rules of conflicts of law thereof.

7.0 Agreement Term and Termination

7.1 Agreement Term

The term of this Agreement (the "Agreement Term") shall begin upon the latest date indicated below the signature of either party ("Effective Date).

Unless otherwise specified, at the expiration of the term set forth in Exhibit A, the contract will automatically extend for a period of one (1) year, with a two and a half percent (2.5%) increase over the previous year's cost, until such time as either party terminates this Agreement pursuant to Section 7.2.

7.2 Agreement Termination

This Agreement may be terminated as follows:

7.2.a Either party may terminate this Agreement if one party's actions expose the other party to any violation of law and fails to cure such actions within 15 days of notice thereof;

7.2.b Either party may terminate this Agreement with the other party if the other party fails to fully perform any material obligation under this Agreement with ninety (90) days to cure;

7.2.c Notwithstanding the foregoing, if the Licensee violates the provisions of Sections 2.0 of this Agreement the Company may terminate this Agreement immediately without notice.

In the event of termination of this Agreement by the Company pursuant to Section 7.2(a) prior to an anniversary date the Company shall refund the unamortized portion (assuming straight line amortization) of the Subscription License paid in the year the termination occurs. In the event of termination of this Agreement by the Company pursuant to Sections 7.2(b) or 7.2(c) prior to an anniversary date, the Company shall be entitled to prepaid Subscription License for the balance of the year of termination.

In the event of termination of this Agreement by the Licensee pursuant to Section 7.2(a) or 7.2(b) Company shall refund the unamortized portion (assuming straight line amortization) of the Subscription License paid.

7.3 Responsibilities in the Event of Termination

Upon any termination of this Agreement and/or the license to use any Edupoint Products, Licensee shall cease to use the Edupoint Products and shall return to Company the Edupoint Products and all copies thereof and all proprietary and confidential property of Company. Licensee shall expunge all copies of the Edupoint Products from its computer(s) and server(s) and shall provide a certificate of an officer of Licensee stating compliance with the preceding sentence. If the Licensee is receiving hosting services from the Company under the Local Hosting operating model, Licensee will cooperate with Company in removal and return to Company all Company provided computing resources installed by Company in Licensee Data Center.

7.4 No Liability for Termination

Except as provided for in this Agreement, neither party shall be liable to the other for damages of any kind, including incidental or consequential damages, damages for loss of prospective business or loss of continuing business, or otherwise which arise due to the expiration or termination of this Agreement. This does not relieve either party from responsibility for damages caused by its actions or breaches of the Agreement, but only for damages related to or resulting from the expiration or termination of the contractual relationship.

7.5 Survivorship

Those sections that by their nature survive expiration or termination of this Agreement will survive such expiration or termination.

8.0 Binding

This Agreement shall be binding upon and inure to the benefit of the administrators, successors, and assigns of the parties.

9.0 General Terms and Conditions

9.1 Entire Agreement

This Agreement supersedes all previous agreements and representations of, between or on behalf of the parties in regard to the subject matter herein. Any document, instrument, or agreement issued or executed contemporaneous or subsequent to this Agreement shall not alter the terms and conditions of this Agreement. This Agreement contains all of Company's and Licensee's agreements, warranties, understandings, conditions, covenants and representations in regard to the subject matter herein. Neither Company nor Licensee will be liable for any warranties, understandings, conditions, covenants or representations not expressly set forth or referenced in this Agreement. Licensee acknowledges that Company reserves the right to refuse any different or additional provisions in purchase orders, invoices or similar documents, and such refused provisions will be unenforceable.

9.2 Headings and Construction

Paragraph headings are for reference only and will not be considered as parts of this Agreement. Wherever the singular is used, it includes the plural, and, wherever the plural is used, the singular is included.

9.3 Amendments, Waiver, and Change Management

This Agreement shall not be amended or modified except in writing that refers specifically to this Agreement by duly authorized representatives of the parties. The failure of either party to enforce at any time or for any period of time the provisions hereof shall not be construed to be a waiver of such provisions or of the right to enforce each and every such provision.

The scope of work described within the Agreement, Exhibits, and Attachments thereto shall not be changed except as provided by the change management procedures which are described in Attachment 5.

9.4 Force Majeure

Except for the obligation to make payments, neither party will be liable for any failure or delay in its performance under this Agreement due to any cause beyond its reasonable control, including acts of war, acts of God, acts of terrorism, earthquake, flood, embargo, riot, sabotage, labor shortage or dispute, governmental act or failure of the Internet (not resulting from the actions or inactions of Company), provided that the delayed party: (i) gives the other party prompt notice of such cause, and (ii) uses its reasonable commercial efforts to promptly correct such failure or delay in performance.

9.5 Severability

If a court of competent jurisdiction holds that any provision of this Agreement is invalid or unenforceable, the remaining portions of this Agreement will remain in full force and effect, and the parties will replace the invalid or unenforceable provision with a valid and enforceable provision that achieves the original intent of the parties and economic effect of the Agreement.

9.6 Notices

Any notice under this Agreement must be in writing and will be deemed given upon the earlier of actual receipt or ten (10) days after being sent by first class mail, return receipt requested, to the address set forth below for Company and Licensee, or as may be provided by the parties.

Edupoint Educational Systems Contract Administration 1955 S. Val Vista Drive #200 Mesa, Arizona 85204	Highline Public Schools 15675 Ambaum Blvd SW Burien, WA 98166

Either party may give notice of its change of address for receipt of notices by giving notice in accordance with this section.

9.7 Applicable Law

Company complies with applicable laws governing online privacy, including the Child Privacy Protection and Parental Empowerment Act, the Family Educational Right to Privacy Act and the Children's Online Privacy Protection Act.

10.0 Application Hosting Services

If Licensee will receive application hosting services through either Local Application Hosting or Remote Application Hosting, Company and Licensee agree to the terms and conditions of Exhibit B, the Application Hosting Services, which is attached hereto and fully incorporated herein. Licensee shall be billed for the Application Hosting (either Local or Remote Services), as per Exhibit A, in accordance with the payment terms set forth in Section 3.0 of this Agreement.

11.0 Software Support Services

Company and Licensee agree to the terms and conditions of Exhibit C, the Software Support Services, which is attached hereto and fully incorporated herein. Licensee shall be billed for the maintenance and support of the Edupoint Products, as per Exhibit A, in accordance with the payment terms set forth in Section 3.0 of this Agreement. Software Support Services beyond those specified in Exhibit C that are requested by Licensee during the Initial Term or following the Initial Term shall be provided for an additional charge.

12.0 Implementation Services

Company and Licensee agree to the terms and conditions of Exhibit D, the Implementation Services, which is attached hereto and fully incorporated herein. Licensee shall be billed for the Implementation Services, as described in Exhibit A, in accordance with the payment terms set forth in Section 3.0 of this Agreement. Implementation Services beyond those specified in Exhibit D that are requested by Licensee during the Initial Term or following the Initial Term shall be provided for an additional charge.

13.0 Source Code Escrow

For Licensees that elect to include Software Escrow Services as part of this Agreement, Company will store with a third party Escrow Agent the Edupoint Products computer source code and documentation licensed as part of this Agreement, including all Company-owned source code necessary to continue operations of Edupoint Products, and other information regarding any additional third party components used in conjunction with the products. Company will designate the Licensee as a User in the Company's Software Source Code Escrow Agreement (see Exhibit E). So long as the Licensee is not in breach of its obligations under this Agreement, the Licensee will have the right to receive materials placed into escrow as per the Release of Deposit Material conditions and procedures specified within Company's contract with the Software Source Code Escrow Agent.

Unless a release event occurs, in no event shall the Licensee have the right to use the Edupoint Products source code for any purpose to reverse engineer, develop derivative works or to sublicense the right to use the source code and documentation to any other person or entity for any purpose. The Licensee will also be obligated to treat the source code and documentation as Confidential Information of Company under this Agreement.

14.0 Inclusions

- i. Exhibit A - Software Licenses
- ii. Exhibit B - Application Hosting Services
- iii. Exhibit C - Software Support Services
- iv. Exhibit D - Implementation Services
- v. Exhibit E – Software Source Code Escrow Services
- vi. Company's Business Expense Policy - Attachment 1
- vii. Standard Billing Rates - Attachment 2
- viii. Company's A La Carte Service Descriptions – Attachment 3
- ix. Non-employee/agent Access Consent Form – Attachment 4
- x. Change Management Procedures – Attachment 5
- xi. Data Center Infra. – Analysis and Doc. – Attachment 6

15.0 Limitations of Liability

Any other provisions of this Agreement notwithstanding, except to the extent included in an award subject to Company’s indemnity obligation, in no event will Company be liable for incidental, consequential, indirect, punitive or special damages of any nature, such as lost business profits. Company’s total liability for any claim whatsoever related to this Agreement, including any cause of action arising in contract, tort, or strict liability, shall not exceed the total amount of all payments made under this Agreement by Licensee to Company during the 365 days preceding the cause of action.

16.0 Statute of Limitations

Any action arising out of or related to this Agreement must be brought within one (1) year from the first date such action could have been brought, despite any longer period provided by statute. If a longer period is provided by statute, the parties hereby expressly waive it.

Company and Licensee have caused this Agreement to be executed on the dates set forth below:

Edupoint Educational Systems
1955 S. Val Vista Drive, Suite 200
Mesa, AZ 85204
(480) 633-7500, (800) EDUPOINT
Fax (480) 633-7501

Highline Public Schools
15675 Ambaum Blvd SW
Burien, WA 98166
(206) 631-3000

Rob Wilson	President
Printed Name	Title
Signature	Date Signed

Printed name	Title
Signature	Date Signed

Confidential & Proprietary

Synergy® Student Educational Platform				Subscription License					
The following Edupoint Products and associated documentation are licensed to Licensee pursuant to this Agreement:				Year 1	Year 2	Year 3	Year 4	Year 5	Total
Synergy® Student Information System									
PK - 12 Student Information (Included)				\$49,840	\$51,086	\$52,363	\$53,672	\$55,014	\$261,975
State Reporting for (Included)									
ParentVUE, StudentVUE, & Streams (Included)				\$12,460	\$12,771	\$13,091	\$13,418	\$13,753	\$65,493
Online Student Registration (Included)				\$24,920	\$25,543	\$26,182	\$26,836	\$27,507	\$130,988
Master Schedule Builder (Included)				\$12,460	\$12,771	\$13,091	\$13,418	\$13,753	\$65,493
Synergy® Learning Management System (LMS)									
TeacherVUE with Gradebook (Included)				\$29,073	\$29,800	\$30,545	\$31,309	\$32,091	\$152,818
LessonVUE (Not in Bid)									
Assessment (Not in Bid)									
Response to Intervention (RTI) (Not in Bid)									
LMS Integration (Not in Bid)									
Synergy® Analytics									
Analytics (Not in Bid)									
Synergy® Special Education									
PK - 12 Student Special Ed (Not in Bid)									
Synergy® Technology & Appl Source Code									
ST Tool Set (Object) & Appl Src Code (Not in Bid)									
Synergy® Distance Learning									
Distance Learning (Not in Bid)									
Sub-Total Subscription Software License				\$128,753	\$131,971	\$135,272	\$138,653	\$142,118	\$676,767
3rd Party Subscription Software									
Year 1				Year 2	Year 3	Year 4	Year 5	Total	
- Test Item Bank (NOT IN BID)									
- GradeCam (Not in Bid)									
Sub-Total 3rd Party Subscription License				\$0	\$0	\$0	\$0	\$0	\$0
Hosting				Hosting					
Year 1				Year 2	Year 3	Year 4	Year 5	Total	
Dedicated Hosted by Edupoint				\$49,840	\$51,086	\$52,363	\$53,672	\$55,014	\$261,975
1 Addl Environments Yes				\$6,375	\$6,534	\$6,698	\$6,865	\$7,037	\$33,509
3rd Party Connections (24) Yes				\$9,968	\$10,217	\$10,473	\$10,734	\$11,003	\$52,395
Sub-Total Hosting Service				\$66,183	\$67,837	\$69,534	\$71,271	\$73,054	\$347,879
Premium Annual Services				Premium Annual Services					
Selected				Year 1	Year 2	Year 3	Year 4	Year 5	Total
Additional Annual Services									
- User Conference Plan (Silver) for 3 Staff Yes				\$5,790	\$5,935	\$6,083	\$6,235	\$6,391	\$30,434
Total Premium Annual Services Amount				\$5,790	\$5,935	\$6,083	\$6,235	\$6,391	\$30,434
Professional Services by Staff				Days	Unit Cost	List Cost	Discount %	Total	
- Project Managers				13	\$1,750	\$22,750	20.0%	\$18,200	
- Technical Experts				24	\$1,500	\$36,000	20.0%	\$28,800	
- Subject Matter Experts				14	\$1,500	\$21,000	20.0%	\$16,800	
- Developers				5	\$1,500	\$7,500	20.0%	\$6,000	
- Data Conversion Specialists				26	\$1,500	\$39,000	20.0%	\$31,200	
- Product Specialists				16	\$1,500	\$24,000	20.0%	\$19,200	
- Trainers				22	\$1,500	\$33,000	20.0%	\$26,400	
Total Professional Services by Staff						\$183,250	20.0%	\$146,600	
Total Five Year Cost (excluding estimated expenses):									\$1,201,680
Total Washington Sales Tax (excluding estimated expenses)									\$123,775
Total Five Year Cost including Sales Tax									\$1,325,455

EXHIBIT A - Continued Payment Schedule by Product and Service

Payment for Edupoint Subscription License				Amount	Payable On
1st Year Edupoint Subscription License				\$128,753	Due upon Contract Signing
2nd Year Edupoint Subscription License				\$131,971	1 year after Contract Signing
3rd Year Edupoint Subscription License				\$135,272	2 years after Contract Signing
4th Year Edupoint Subscription License				\$138,653	3 years after Contract Signing
5th Year Edupoint Subscription License				\$142,118	4 years after Contract Signing
Total 5 Year Edupoint Subscription License				\$676,767	
Hosting				Amount	Payable On
1st Year				\$66,183	Due upon Contract Signing
2nd Year Hosting				\$67,837	1 year after Contract Signing
3rd Year Hosting				\$69,534	2 years after Contract Signing
4th Year Hosting				\$71,271	3 years after Contract Signing
5th Year Hosting				\$73,054	4 years after Contract Signing
Total 5 Year Hosting Dedicated Hosted by Edupoint 1 Addl Environments 3rd Party Connections (24)				\$347,879	
Payment for On-Going Premium Annual Services				Amount	Payable On
1st Year Maintenance for Premium Annual Services				\$5,790	Due upon Contract Signing
2nd Year Maintenance for Premium Annual Services				\$5,935	1 year after Contract Signing
3rd Year Maintenance for Premium Annual Services				\$6,083	2 years after Contract Signing
4th Year Maintenance for Premium Annual Services				\$6,235	3 years after Contract Signing
5th Year Maintenance for Premium Annual Services				\$6,391	4 years after Contract Signing
Total 5 Year On-Going Premium Annual Services				\$30,434	
Payment Schedule for Professional Services			Percent	Amount	Payable On
Planning / Installation and Configuration			40%	\$58,640	Upon Phase Completion
Application Setup and Data Conversion required for Go-Live			20%	\$29,320	Upon Phase Completion
Core Team Training			20%	\$29,320	Upon Phase Completion
Interfaces and Production Deployment			15%	\$21,990	Upon Phase Completion
Post-Deployment			5%	\$7,330	Upon Phase Completion
Total Payment for Professional Services				\$146,600	

Note: Expenses are billed as incurred according to the guidelines provided in the Standard Billing Rates.

Total Five Year Cost (excluding estimated expenses):	\$1,201,680
Total Washington Sales Tax	\$123,775
Total Five Year Cost including Sales Tax (excluding estimated expenses)	\$1,325,455

EXHIBIT A - Continued
Payment Schedule by Year

Detailed Payment Schedule		Amount	Total
Due Upon Contract Signing			
1st Year Subscription License (taxable)		\$128,753 T	
1st Year Dedicated Hosted by Edupoint		\$66,183 T	
1st Year Maintenance for Premium Annual Services		\$5,790 T	
Planning / Installation and Configuration	40%	\$58,640 T	
Application Setup and Data Conversion required for Go-Live	20%	\$29,320 T	
Core Team Training	20%	\$29,320 T	
Interfaces and Production Deployment	15%	\$21,990 T	
Post-Deployment	5%	\$7,330 T	
	Payment Due		\$347,326
	Washington Sales Tax		\$35,775
Sub-Total Payment Due including Sales Tax			\$383,101
Due 1st Year after Contract Signing			
2nd Year Subscription License (taxable)		\$131,971 T	
2nd Year Dedicated Hosted by Edupoint		\$67,837 T	
2nd Year Maintenance for Premium Annual Services		\$5,935 T	
	Payment Due		\$205,743
	Washington Sales Tax		\$21,192
Sub-Total Payment Due including Sales Tax			\$226,935
Due 2nd Year after Contract Signing			
3rd Year Subscription License (taxable)		\$135,272 T	
3rd Year Dedicated Hosted by Edupoint		\$69,534 T	
3rd Year Maintenance for Premium Annual Services		\$6,083 T	
	Payment Due		\$210,889
	Washington Sales Tax		\$21,722
Sub-Total Payment Due including Sales Tax			\$232,611
Due 3rd Year after Contract Signing			
4th Year Subscription License (taxable)		\$138,653 T	
4th Year Dedicated Hosted by Edupoint		\$71,271 T	
4th Year Maintenance for Premium Annual Services		\$6,235 T	
	Payment Due		\$216,159
	Washington Sales Tax		\$22,265
Sub-Total Payment Due including Sales Tax			\$238,424
Due 4th Year after Contract Signing			
5th Year Subscription License (taxable)		\$142,118 T	
5th Year Dedicated Hosted by Edupoint		\$73,054 T	
5th Year Maintenance for Premium Annual Services		\$6,391 T	
	Payment Due		\$221,563
	Washington Sales Tax		\$22,821
Sub-Total Payment Due including Sales Tax			\$244,384
Total Five Year Cost (excluding estimated expenses)			\$1,201,680
Total Washington Sales Tax			\$123,775
Total Five Year Cost			\$1,325,455

Pricing Notes:

- This pricing is valid until 04/24/19. Sales tax is included
- This proposal was based on 33 Schools with 19,545 students.
- An expense estimate of \$19,236 has been provided. Professional Services will only be billed based on actual expenses incurred.
- The Standard Billing Rates convey the daily billing rates, which were used to derive all of the services cost information in this proposal, prior to any applicable discounts.
- Proposal includes data conversion services to convert 7 years of historical data.
- Subscription License has a 15.0% discount applied to license fees.
- Professional Services has a 20.0% discount applied to all your professional services fees.
- Escalation of 2.5% has been applied.
- Estimated Washington Sales Tax based on 10.300%.

EXHIBIT B

APPLICATION HOSTING SERVICES

1.0 Reference to Agreement

This Exhibit is only applicable for Licensees who are hosted by the Company. This Application Hosting Services Exhibit is subject to and incorporates all of the provisions stated in the Edupoint Software License Agreement between **Company** and **Licensee** as of the Effective Date.

2.0 Fees

During the Initial Term Licensee shall pay annual fees as shown on Exhibit A, and for each Subsequent Term, Licensee shall pay annual fees according to the Company's then current fees for the Application Hosting Services. Company shall provide fixed pricing for initial agreement term, and provide Licensee six months' notice of any proposed increase in the then applicable Application Hosting Services fees for subsequent terms. Company and Licensee shall each have the right to review the number of students enrolled and increase or decrease the license count and adjust application hosting services fees accordingly.

3.0 Services

During the term of the License, and subject to payment of the fees for the Edupoint Products and the fees for the Edupoint Services, Company shall provide the following services (the "Application Hosting Services") to Licensee:

3.1 Included Services

3.1.a Configuration Planning

Company will determine the specifications for and configuration of the computing resources (number and type of web server(s), process server(s), application database server(s), and load balancer(s) based on the processing and storage needs of the Licensee, using commercially reasonable methods and historical data from other similarly sized licensees. This configuration planning is the basis for the System Hardware and Additional Software and Middleware required, and may change from time to time as system requirements change. Company will constantly monitor system performance and modify the configuration plan to maintain an acceptable level of system performance.

3.1.b Edupoint will perform an annual review of the hosted environment including, penetration test and antivirus scan.

3.1.c System Hardware

Company shall provide access to a digital information processing, transmission and storage system (the "System Hardware") enabling Licensee to perform operations using the functionality of the Edupoint Products as described in the Documentation, and to make the information generated by and stored in the database(s) supported by the Edupoint Products available on demand by users. System hardware, system software, load balancer, database software and database storage shall be located at the Company's Remote Data Center.

3.1.d The following activities are included in the application hosting cost:

Deploying hardware and infrastructure required, software hosting and systems administration:

3.1.d.1 Systems Administration provides day-to-day management and administration of the operating system and database platform for all servers in the Synergy environment. Specific components of this service include:

- i. Maintenance of the database
- ii. Maintenance and updating of the server operating system
- iii. Performance monitoring of SIS hardware and system software and recommendations for required updates
- iv. Ongoing maintenance of hosted environment

3.1.e Additional Software and Middleware

Company will provide all Additional Software and Middleware software necessary for the Edupoint Products, including installation and licensing of Window OS, Microsoft SQL or Oracle server, and SSL certificate(s).

3.1.f Configuration and Setup

Upon approval of the Implementation Project Charter and Work Plan, Company will provide initial configuration including operating system installation, database installation, patching the operating system and database, and installing and configuring all the Edupoint Products and Additional Software and Middleware; creation and configuration of Production and Training environments and Production and Training databases. The Training environment will be used for the purpose of training end users in a non-production environment and other non-production uses upon the request of the Licensee. Prior to the Edupoint Products being placed into production, the Company will provide final hardware configuration and application setup for setting proper Licensee specific application parameters and Licensee's organization specific information. Company will be responsible for ongoing re-configuration of hardware and adjustments to application setup for additional module add-ons or changes to Licensee infrastructure that require changes to the system configuration and application setup.

3.1.f.1 Restrictions

Licensee will have a limit as to the following configuration options in a hosted environment:

- Audit Trail: Audit detail will be kept for one year and purged after year end backup. Audit detail will impact storage requirements and may be retained longer at the Licensee discretion. Exceptions for Attendance and Grade Reporting Mark data will be retained for the current school year and purged prior to the start of the following school year.
- Process Queue: Company recommends a maximum of 5 days but may be retained longer at the Licensee discretion. Process Queue results storage will impact space requirements.

3.1.g Edupoint will provide the following environment(s) to Licensee:

3.1.g.1 A production environment that includes access to all licensed modules;

3.1.g.2 A training environment includes access to all licensed modules for demonstration purposes;

3.1.g.3 Any additional environments (test, development, or demonstration) will have an additional cost of \$.25/student.

3.1.h Edupoint Product Updates

Company will provide support for the Edupoint Products through installation of Company provided modifications including remedial "Patches" or "CEs" ("Continuous Enhancements") addressing reported performance or functionality problems and "Upgrades" consisting of new releases or versions of the Edupoint Products and Additional and Middleware software issued by the vendor of that Additional and Middleware software as part of its software maintenance offering, typically indicated by a change in the numeric identifier in the version number of the software. Company will install CE's and Updates in accordance with the Release Management Section set forth in Section 6.0 below in a commercially reasonable timeframe following its release of CE's, new releases or versions of the Edupoint Products or Company's receipt of the CE or Update from the Additional and Middleware software vendor. In addition to administering all updates to the Edupoint Products, Company is responsible for procuring and administering vendor-provided maintenance for any Additional and Middleware software supplied by the Company under this Agreement.

3.1.i Backup

Company shall create and maintain a backup plan whereby Licensee Production Content is backed up to a Company managed Remote Data Center (the "Remote Data Center"), the location of which is subject to change from time to time at Company's sole discretion. Company shall retrieve each business day an electronic backup of the Licensee Content, as defined below in Section 7.1, for the purpose of off-site archival in the case of disaster recovery.

Backup data sets will be provided to the Licensee via direct access to the secure backup data host. Company will work with the Licensee to configure, at a minimum of weekly, downloading of the backup data sets initiated from Licensee's local environment.

3.1.i.1 Backup frequency

3.1.i.1.i Full Back up once per week

3.1.i.1.ii Differential backup once per day

3.1.i.1.iii Transactional backup – every 15 minutes

3.1.i.1.iv Weekly backups retained for 4 weeks. Monthly backups retained for 12 months. Yearly backups retained for 7 years.

3.1.i.1.v Backups are retained only if Licensee has a current hosting agreement.

3.1.i.2 Backups are replicated at multiple data centers co-located across the U.S.

3.1.i.3 Recovery Point Objective is to recover the environment from backup so that mission-critical operations can continue.

3.1.i.3.i Mission-critical includes administrative and teacher usage, not parents or students.

3.1.i.4 Recovery Time Objective is 24 hours

3.1.j Disaster Recovery

Company shall maintain backup servers at the Remote Data Center with data communications connections between such servers and the Licensee's Data Center and maintain backups of Licensee Content at Company's Remote Data Center such that Company shall be capable of providing Remote Application Hosting Services on and from such backup servers within seventy-two (72) hours of any disruption of the Licensee's Data Center.

3.2 Additional Hosting Models:

All services indicated in section 3.1 are included in the base hosting model – *Shared Cloud Hosting*. The base model *Shared Cloud Hosting* minimizes cost by optimizing resource utilization within the Company's Remote Data Center. Additional levels of hosting service are available for additional costs and provide added features and options. The following are the additional hosting models offered:

3.2.a Hybrid Cloud Hosting

(a) Disk storage will be priced based on an initial storage allotment of one (1) terabyte (TB).

Additional (1) TB increments will be available with additional charge.

(b) Basic user interactions (excluding process server jobs) occur within an average of 7 seconds.

(c) Dedicated SQL Server is optional and available for an additional charge. This option provides a point to point VPN connection to allow direct data manipulation and extraction including selects/Inserts/Updates/Deletes.

(d) SQL Server High Availability options are available for an additional charge.

(e) Establish their own Release Management Schedule coordinated with the Company's Technical Services Team.

NOTE: Other infrastructure resources can be deployed on shared resources at the Company's discretion.

3.2.b Dedicated Cloud Hosting

(a) Perform direct SQL against hosted database including selects/Inserts/Updates/Deletes provided through a point to point VPN connection.

- (b) Deploy custom software additions based on ST framework.
- (c) Disk storage will be priced based on an initial storage allotment of one (1) terabyte (TB). Additional (1) TB increments will be available with additional charge.
- (d) Basic user interactions (excluding process server jobs) occur within an average of 7 seconds.
- (e) SQL Server High Availability options are available for an additional charge.
- (f) Establish their own Release Management Schedule coordinated with the Company's Technical Services Team.

3.3 Excluded Services

- (a) Support of Licensee's Client Desktops
- (b) Support or diagnosis of Licensee's Local Area Network connectivity
- (c) Licensee's Local Area Network device configuration such as proxy servers

4.0 Availability of Services

(Not applicable if Licensee selected Self Hosting.)

Subject to the terms and conditions of this Agreement, Company shall use its best commercial efforts to provide the Application Hosting Services for twenty-four (24) hours a day, seven (7) days a week throughout the term of this Agreement.

4.1 Downtime

Licensee agrees that from time to time the Application Hosting Services may be inaccessible or inoperable for various reasons, including (i) equipment malfunctions; (ii) periodic maintenance procedures or repairs which Company may undertake from time to time; or (iii) causes beyond the control of Company or which are not reasonably foreseeable by Company, including interruption or failure of telecommunications or digital transmission links, hostile network attacks, network congestion or other failures (collectively "Downtime").

4.2 Advance Notice

Company shall provide twenty-four (24) hour advance notice to Licensee in the event of any scheduled Downtime.

5.0 Security

For Company Application Hosting Services, Company shall operate and maintain the Edupoint Products, System Hardware, Additional and Middleware in good working order with access restricted to authorized employees of Company and persons specifically designated by Licensee. Company shall maintain systems consistent with security controls as described in the National Institute of Standards and Technology (NIST) Standards Publication (SP) 800-26, Security Self-Assessment Guide for Information Technology Systems. Company shall undertake to perform reasonable measures to ensure the security, confidentiality and integrity of all Licensee Content and other proprietary information transmitted through or stored on the Application Hosting Site, including:

- (a) Firewall protection of the Application Hosting Site;
- (b) Maintenance of independent archival and backup copies of the Edupoint Products and Documentation and all Licensee Content; and
- (c) Protection from network attack or other malicious harmful or disabling data, work, code or program.

6.0 Release Management

For all Production and Training Environments, Company will follow "Release Management Procedures" in completing changes in the products or product release levels in current use and in implementing Application Patches and Upgrades (collectively "Change Events"). These Release Management Procedures will in all cases provide for the following:

- (a) Advance notification to the Licensee of the Change Event, its nature and expected timetable;
- (b) Written notice of application changes and modifications to screens or code;

- (c) Pre-testing of changes, including any modifications to screen or code in Company or Licensee non-Production environments; and
- (d) Coordination of the implementation of the Change Event with the Licensee.

7.0 Proprietary Rights

7.1 Licensee Content

Licensee shall be solely responsible for providing, updating, uploading and maintaining the data stored on the Application Hosting Site and any and all files, pages, data, works, information and/or materials on, within, displayed, linked or transmitted to, from or through the Application Hosting Site, including without limitation, trade or service marks, images, photographs, illustrations, graphics, audio clips, video clips, e-mail or other messages, metatags, domain names, software and text (the "Licensee Content"). The Licensee Content shall also include any registered domain names provided by Licensee or registered on behalf of Licensee in connection with the Application Hosting Services.

7.2 Alterations

Except as provided herein or by law, Company may not alter, modify, change, remove or disable access to all or any portion of the Application Hosting Site or Licensee Content stored on the System Hardware at the Application Hosting Site.

7.3 Ownership of Licensee Content

Company acknowledges that the Licensee Content is owned solely by the Licensee. Following termination of this Agreement, Licensee shall remove or request that the Company remove on a fee for service basis, all Licensee Content from Company Products and thereafter expunge all copies of the Company Products from its computing infrastructure and provide a certificate of an officer of Licensee confirming compliance with the same. Company further warrants that it shall not lease, sell, rent or otherwise disclose Licensee Content to any third party without prior consent of the Licensee.

EXHIBIT C

SOFTWARE SUPPORT SERVICES

1.0 Reference to Agreement

This Exhibit is subject to and incorporates all of the provisions stated in the Edupoint Software License Agreement, between Company and Licensee as of the Effective Date.

2.0 Fees

During the Initial Term, Company shall provide Licensee with Software Support Services according to the fees described in Exhibit A. Following the Initial Term, for each Subsequent Term Licensee shall pay annual fees according to the then current fees for the Software Support Services. Company shall provide Licensee six months' notice of any proposed increase in the then applicable fee. Company and Licensee shall each have the right to review the number of students enrolled and increase or decrease the license count and adjust services fees according to the then current services fees for the licensed Edupoint Products.

3.0 Software Support Services

Company provides software updates and support services for the current version and the immediately prior version only.

Licensee shall select one of the maintenance and support plans; Basic Plan or Premium Plan. Both the Basic Plan and the Premium Plan are based upon the Licensee providing its own first level support of the Edupoint Products, such that support requests from the Licensee's school operations and district office staff are first routed to the Licensee's internal adequately staffed and competently trained student information system support group or helpdesk. Support requests that cannot be resolved by the Licensee's internal support group will be routed to Company for resolution.

3.1 BASIC MAINTENANCE AND SUPPORT PLAN

a) Software Updates Include:

- Minor extensions to existing software modules, as these are defined and released by Company.
- Enhancements which improve the usability of existing software modules, as these are defined and released by Company.
- New software modules representing new functionality, unless Company establishes separate pricing for the licensing and maintenance of such modules.
- Changes necessary to meet state reporting requirements as per specifications published by the respective State's authorized educational agency.
- Changes necessary to meet federal reporting requirements as per specifications published by the authorized federal agency.
- Changes necessary to maintain or improve interfaces between the Edupoint Products and other Licensee software application systems so long as Company provided such interfaces to the Licensee and the Licensee has not altered such interfaces.
- For Licensee purchasing Synergy Technology maintenance, the application source code will be refreshed at the time of publication of a Continuous Enhancement (CE) or annual release.

b) Support Services Includes:

- Company Staff will be available to answer questions and resolve issues between the hours of 6 a.m. and 6 p.m. (MST) via telephone, e-mail, or web support. This support includes telephone and research time performed by hotline staff, incoming 800 line, and outgoing long distance charges. Company will also provide e-mail support, which includes a response within 4 hours for non-outage issues received during regular business hours, and a response by the end of the next business day for issues received outside regular business hours.

- The following days are recognized as Company holidays. The Company's support function will not be staffed on these days:

New Year's Day	Independence Day	Day after Thanksgiving
Presidents' Day	Labor Day	Christmas Day
Memorial Day	Thanksgiving Day	Christmas Week

3.2 PREMIUM USER CONFERENCE PLANS

These plans include everything included in the Basic Maintenance and Support Plan plus additional services as defined in the designations below: Copper, Bronze, Silver, Gold and Platinum.

- Copper: Licensee may send one (1) representative to attend Company's Users' Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.
- Bronze: Licensee may send two (2) representatives to attend Company's Users' Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.
- Silver: Licensee may send three (3) representatives to attend Company's User's Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.
- Gold: Licensee may send four (4) representatives to attend Company's Users' Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.
- Platinum: Licensee may send five (5) representatives to attend Company's Users' Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.
- Platinum Plus: Licensee may send ten (10) representatives to attend Company's Users' Conference with travel (airfare) and lodging (hotel) expenses paid and scheduled by Company.

Registration and scheduling of participation in Company's Users Conference must be made at least 30 days prior to the event. Travel expenses that will be paid by Company do not include parking, transportation to/from hotel or airport, incidentals at hotel, evening meals, or fees associated with travel changes made after booking. Licensee may send additional staff at Licensee's own expense.

4.0 Payment

4.1 Adjustment of Software Support Services Fees

Company may change the Support Services fees provided under this Agreement at any time by providing thirty (30) days prior written notice to Licensee.

4.2 Costs Related to Modified Software

If Company corrects defects or problems attributable to errors made by Licensee or corrections or modifications made by Licensee, Licensee agrees to pay Company for such services at the Company's then current standard rates.

4.3 Diagnostic Expenses

In the event Company performs services to diagnose a defect that Licensee claims exists in the Edupoint Products and Company subsequently demonstrates the Edupoint Products conforms to specifications as described in Section 4.2 of the Agreement or Licensee is not operating the Edupoint Products within a computing infrastructure that is consistent with Company's published Hardware and Software Requirements or the Data Center Infrastructure-Analysis and Documentation, Licensee will reimburse Company for such services in accordance with this Agreement, or otherwise at then-current rates.

5.0 Major Outage

5.1 Definition of a Major Outage

A "Major Outage" is defined as one of the following: (i) a complete failure of the Edupoint Products that results in the inability by Licensee to use the Edupoint Products, (ii) the loss, corruption or unintended migration of Licensee Content related to Edupoint Products, (iii) the loss of an Edupoint Products function that supports an urgent business process (i.e. report card issuance), or (iv) an Edupoint Products interface failure that results in the inability by the Licensee to use the Edupoint Products.

5.2 Definition of Response

“Response” is defined as contacting the Licensee in response to receipt of a trouble ticket and working with Licensee to solve the problem. Once a trouble ticket has been documented, updates will be provided to the Licensee a minimum of twice a day until a Major Outage has been resolved or the urgency level associated with the trouble ticket has been downgraded by the Licensee. Company will work diligently to solve all Licensee problems; however, Company cannot provide any guarantee as to when a Major Outage will be resolved.

5.3 Response Time for a Major Outage

5.3.a E-support response time – within two (2) hours.

5.3.b Phone support – within one (1) hour.

6.0 Non-Major Outage

6.1 Definition of Response

“Response” is defined as contacting the Licensee in response to receipt of a trouble ticket and working with the Licensee to solve the problem. Once a trouble ticket has been documented, updates will be provided to the Licensee on a reasonable ongoing basis until a Non-Major Outage is resolved. Company will work diligently to solve all Licensee problems; however, Company cannot provide any guarantee as to when a Non-Major Outage will be resolved.

6.2 Response Time for a Non-Major Outage

6.2.a E-support response time – within two (2) business days.

6.2.b Phone support – within one (1) business day.

7.0 Modifications Excluded

Company shall not be obligated to provide support or maintenance services pursuant to this Agreement with respect to any modifications to the Edupoint Products made by Licensee or to any Licensee sponsored computer program incorporating all or any part of the Edupoint Products.

8.0 Access to Data and Computer

On request, Licensee agrees to provide Company with printouts of the Edupoint Products or of data in storage that shows evidence of a programming error. Licensee further agrees to provide Company with access to the Application Hosting Site and further agrees to provide sufficient computer time to enable Company to duplicate the problem, determine that it results from the Edupoint Products and, after corrective action or replacement has taken place, and determine that the problem has been alleviated.

EXHIBIT D

IMPLEMENTATION SERVICES

This Implementation Services Exhibit is subject to and incorporates all of the provisions stated in the Edupoint Software License Agreement, between **Company** and **Licensee**.

1.0 Fees

During the Term of the Agreement, Company shall provide Licensee with Implementation Services in the amount of and costs shown in Exhibit A.

2.0 Additional Implementation services

Licensee may, by agreeing to changes to the scope of work through the change management process or simply as a matter of choice, purchase additional implementation services. The daily rates shown on Attachment 2 do not include travel expenses, which will be billed monthly as actually incurred not to exceed the GSA Guidelines.

3.0 Flexible Resource Allocation

Company provides a System Implementation Methodology (SIM) which, based on Company's experience, represents the best practice approach to implementation, but Company also recognizes that one size doesn't fit all. The Licensee may have varying degrees of technical, support, and training resources of their own as well as varying abilities to make these resources available to contribute to the implementation project. The Licensee may have significant capacity to handle technical or training tasks itself, thereby freeing Company resources for more effort on another task such as converting additional years of historical data. Therefore, in order to allow the Licensee to make the best use of both its and Company's resources available for implementation, Company is providing this flexible resource allocation plan. The number of days shown in Exhibit A represents days of Company provided professional services reserved for the Licensee for each task of the implementation of the Edupoint Products, and the Licensee can influence how these days will be used over the course of the implementation project.

Upon the start of the implementation project the Company project team and the Licensee's core team will collaborate on the development of the Project Charter and Work Plan. This effort will result in agreement on the roles and responsibilities of both parties, which will in turn result in the most prudent allocation of both Company's and Licensee's resources. Once completed, the Project Charter and Work Plan become the baseline for the implementation project, which begins when this baseline has been established and approved by both Licensee and Company.

4.0 Standard Data Conversion

Standard data conversion is defined as the conversion of the Licensee's legacy system's complete current year plus enrollment and transcript history for the prior three years. Historical special education data may be converted to PDF documents, stored and retrievable with the student's record in the Edupoint Products. Company's data conversion service includes the conversion of all data necessary to allow schools to start using the Edupoint Products, and allow complete and accurate outputs; e.g., school and district level reports for each functional category, and state and federal reports. Conversion of additional historical or other data is available at additional cost based on Company's daily rates.

5.0 Third Party Integration/Interfaces

Company's system implementation methodology includes required third-party integration between the Edupoint Products and other application systems through re-use of interface/integration techniques that have already been developed by Company or which can be met by implementation project staff using available extract, transform, and load utilities/queries. Custom interfaces/integrations (between Edupoint Products and other software applications from either 3rd parties or developed by the Licensee) and custom reports are defined as any interface/integration or report which requires Company developers to write software code. Custom interfaces can be provided at additional cost based on Company's daily rates.

6.0 Custom Development

Company's System Implementation Methodology is based upon Licensee implementing the Edupoint Products as a true COTS solution limiting customizations to those that can be realized through the powerful application setup flexibility built into the Edupoint Products. Licensee uses the Edupoint Products as a true COTS solution requiring no vendor customization, either before or after implementation. As such, no custom development has been included in Exhibit A. Once the COTS solution has been implemented, the Company (if initiated by Licensee) will provide its process consulting experts to work with the Licensee (using the change management process) to price and schedule any required customizations. The Licensee also has the option of licensing the Company's Synergy Technology Application Development Platform and application source code within the solution, giving the Licensee the ability to develop its own extensions and customizations to the Edupoint Products.

7.0 Payment Terms

7.1 Payment Terms

Licensee will pay Company the Fees and Expenses monthly as incurred, net 30 days from date of invoice.

7.2 Travel Expenses

Licensee agrees to pay Company for the following actual and reasonable travel expenses incurred for Company personnel to travel to Licensee's facilities: (a) unless otherwise agreed to by Licensee in writing and in advance, non-refundable, 14 days' advance purchase and coach class air fare; (b) a standard room at a moderate expense motel room within ten miles of Licensee's facilities; (c) a single, compact class, rental car for all Company employees traveling to Licensee's facilities that day; (d) meals in accordance with the Business Expense Policy attached hereto as Attachment 1; and (e) parking expense at an off-site parking vendor at the airport from which Company personnel fly to Licensee's facilities. No other travel expenses shall be paid by Licensee without Licensee's advance approval. Licensee shall not be responsible for any telephone charges.



Exhibit E

Beneficiary Enrollment Form and Amendment

Depositor and Iron Mountain Intellectual Property Management, Inc. ("Iron Mountain"), hereby acknowledge that _____ is the **Beneficiary** referred to in the Escrow Agreement that supports **Deposit Account Number: 36742** with Iron Mountain as the escrow agent. **Beneficiary** hereby agrees to be bound by all provisions of such Agreement, as amended herein. The last date noted on the signature blocks of this enrollment shall be the Effective Date.

Authorized Person(s) Notices Table			
Please provide the name(s) and contact information of the Authorized Person(s) under this Agreement. Please complete all information as applicable. Incomplete information may result in a delay of processing.			
DEPOSITOR		BENEFICIARY	
Print Name	Tom McGrew	Print Name	
Title	VP/CTO	Title	
Email Address	tmcgrew@edupoint.com	Email Address	
Street Address	101 Pacifica, Suite 240	Street Address	
Province/City/State	Irvine, CA	Province/City/State	
Postal/Zip Code	92618	Postal/Zip Code	
Phone Number	480.633.7500	Phone Number	
Fax Number	480.633.7502	Fax Number	
Billing Contact Information Table			
Please provide the name and contact information of the Billing Contact under this Agreement. All Invoices will be sent to this individual at the address set forth below.			
DEPOSITOR		BENEFICIARY	
☐ Check if same as Authorized Person		☐ Check if same as Authorized Person	
Company Name	Edupoint Educational Systems, LLC	Company Name	
Print Name	Christine Baumann	Print Name	
Title	Director of Finance	Title	
Email Address	cbaumann@edupoint.com	Email Address	
Street Address	1955 S Val Vista Dr, Ste 200	Street Address	
Province/City/State	Mesa, AZ	Province/City/State	
Postal/Zip Code	85204	Postal/Zip Code	
Phone Number	480.633.7500	Phone Number	
Fax Number	480.633.7502	Fax Number	
Purchase Order #		Purchase Order #	

Beneficiary Enrollment Form Work Request				
Please check boxes to order services and to identify the Paying Party				
Service	Service Description			Paying Party
☒ Add Additional Beneficiary	Iron Mountain will fulfill a Work Request to add a new Beneficiary to an escrow deposit account in accordance with the Agreement.			☒ Depositor ☐ Beneficiary
☒ Add File List Report	Iron Mountain will fulfill a Work Request to provide a File List Test, which includes a deposit media readability analysis, a file listing, a file classification			☒ Depositor ☐ Beneficiary

	table, virus scan outputs, and assurance of completed deposit questionnaire. A final report will be sent to the Paying Party regarding the Deposit Material to ensure consistency between Depositor's representations (i.e., Exhibit B and Deposit Questionnaire) and stored Deposit Material. Deposit must be provided on CD, DVD-R, or deposited by sFTP.			
☐ Add Level 1 - Inventory and Analysis Test	Iron Mountain will perform an Inventory Test on the initial deposit, which includes Analyzing deposit media readability, virus scanning, developing file classification tables, identifying the presence/absence of build instructions, and identifying materials required to recreate the Depositor's software development environment. Output includes a report which will include build instructions, file classification tables and listings. In addition, the report will list required software development materials, including, without limitation, required source code languages and compilers, third-party software, libraries, operating systems, and hardware, as well as Iron Mountain's analysis of the deposit.			☐ Depositor ☐ Beneficiary
☒ Add Deposit Tracking Notification	At least semi-annually, Iron Mountain will send an update reminder to Depositor. Thereafter, Beneficiary will be notified of last deposit.			☒ Depositor ☐ Beneficiary

IN WITNESS WHEREOF, the Parties have duly executed this Enrollment as of the Effective Date by their authorized representatives:

DEPOSITOR		BENEFICIARY	
Signature		Signature	
Print Name		Print Name	
Title		Title	
Date		Date	
Email Address		Email Address	

IRON MOUNTAIN INTELLECTUAL PROPERTY MANAGEMENT, INC.	
Signature	
Print Name	
Title	
Date	
Email Address	ipmclientservices@ironmountain.com

All notices to **Iron Mountain Intellectual Property Management, Inc.** should be sent to ipmclientservices@ironmountain.com OR Iron Mountain Intellectual Property Management, Inc., Attn: Client Services, 2100 Norcross Parkway, Suite 150, Norcross, Georgia, 30071, USA. Telephone: 800-875-5669. Facsimile: 770-239-9201

Attachment 1

BUSINESS EXPENSE POLICY

Occasionally, during the course of business employees will incur expenses on behalf of the Company. It shall be the policy of Company to reimburse employees for the cost of these expenses if they are properly authorized and documented in accordance with the following procedures:

Auto Expenses

The Company will assume or reimburse the employee for all reasonable personal automobile expenses incurred in carrying out work assignments.

Guidelines

Reimbursement for the use of the employee's own car will only be made if prior approval for the car's use has been given by the appropriate supervisor and documentation that the employee has appropriate auto insurance coverage is on file.

To receive reimbursement for miles driven on Company business, the employee must complete the mileage portion of the expense form. All mileage for the calendar month must be reported on a single expense report.

Mileage expense shall be reimbursed monthly at current IRS mileage rates.

In the event that multiple vehicles are traveling to the same destination, employees will use all reasonable effort to carpool. If an employee chooses not to carpool, based on personal discretion, Company reserves the right to not reimburse for miles driven.

Travel Expenses:

The Company will assume or reimburse the employee for reasonable business expenses incurred in carrying out work assignments away from their primary location.

Airfare

When reasonable to do so, employees should use the Company provided travel agent for booking airfare. Only coach-class tickets are reasonable, and the Company will not reimburse business- or first-class tickets or upgrades.

Ground Transportation

When reasonable to do so, employees should use the Company provided travel agent or direct contracts for reserving auto rentals. When appropriate, employees shall use public transportations (taxi, train, or shuttle).

Meals and Incidentals

The employee will be reimbursed up to a "not to exceed" amount for meal and incidental expenses at a rate set forth by the US General Services Administration's Domestic Per Diem Rates. Meals and Incidentals not to exceed amounts are calculated on a "per trip" basis. As an example, an employee traveling for four days to a location with a \$59 rate would have a trip not to exceed amount of \$236 for the trip (\$59*4). A full day of travel will be reimbursed if the travel day begins prior to 7:00 a.m. local time, and is completed after 7:00 p.m. local time. Partial days will be reimbursed using the GSA Meals and Incidental Expense Breakdown for partial days.

When an employee is on a trip that lasts seven or more days, reasonable laundry and valet costs will be reimbursed if documented by the proper receipts.

Attachment 2

STANDARD BILLING RATES

Version 18, Effective January 1, 2017

Standard Billing Rates are subject to revision by Edupoint on January 1st of each year. This list includes daily rates for services performed by an Edupoint representative. Edupoint invoices its clients as services are performed and expenses are incurred. Except as noted below, all services are billed at a minimum of one-half (1/2) day's rate.

Job Functions	Rates
1) <u>EXECUTIVES</u>	\$2,000/Day
2) <u>SENIOR TECHNICAL EXPERTS</u>	\$2,000/Day
3) <u>PROJECT MANAGERS</u>	\$1,750/Day
4) <u>TECHNICAL EXPERTS</u>	\$1,500/Day
5) <u>SUBJECT MATTER EXPERTS</u>	\$1,500/Day
6) <u>DEVELOPERS</u>	\$1,500/Day
7) <u>DATA CONVERSION SPECIALISTS</u>	\$1,500/Day
8) <u>PRODUCT SPECIALISTS</u>	\$1,500/Day
9) <u>TRAINERS</u>	\$1,500/Day
10) <u>ADMINISTRATIVE SUPPORT</u>	\$750/Day

NOTE:

Travel Day

If a travel day is required the day before or the day after services are performed, the travel day will be charged at \$400/day.

Expenses

All expenses will follow the guidelines set forth in Attachment 1.

Attachment 3

EDUPOINT'S A LA CARTE SERVICE DESCRIPTIONS

Version 1.3

Systems Review – Annual Service

Systems Review is a service for self-hosted districts which provides an annual review (1 to 2 days depending on district size) of the current hardware configuration and server farm maintenance process, to ensure proper ongoing configuration and enterprise level system performance.

System Review responsibilities are limited to the Licensee's server farm (production, test, and training environments sometimes collectively referred to as the "system(s)") and load balancer supporting the Edupoint Products and include:

- Analyze operating system logs, identify potential issues and recommend course of action.
- Perform audit of operation system configuration and review process of application of operating system updates.
- Developing recommendations for any necessary modifications to the composition and configuration of the server farm that are required to maintain satisfactory application software performance levels for end users. NOTE: This includes reviewing new application functionality (including Synergy functionality, 3rd party tools and integrated applications) put in use over the course of time since the last review or initial installation, which could require configuration changes in the server farm.
- Review disaster recovery plans.
- In depth review of database server – aka Database Server Health Check – to ensure proper maintenance plans are in place, review indexing schemes, review backup strategies, check throughput of disk subsystem (e.g. local disk arrays, SAN, etc.) and overall configuration of database equipment.
- Answering technical queries during review process.

Backup and Disaster Recovery – Annual Service

For the Licensee's Production database and environment Company will perform the following:

- Create and Maintain disaster recovery plan and executing plan in a disaster event.
- Ensure Licensee Content is backed up to a Company managed Remote Data Center (the "Remote Data Center"), the location of which is subject to change from time to time at Company's sole discretion. Company shall retrieve each business day an electronic backup of the Licensee Content for the purpose of off-site archival in the case of disaster recovery.
- Maintain backup servers at the Remote Data Center with data communications connections between such servers and the Licensee's Data Center and maintain backups of Licensee Content at Company's Remote Data Center such that Company shall be capable of providing Remote Application Hosting Services on and from such backup servers within seventy-two (72) hours of any disruption of the Licensee's Data Center.

Release Management – Annual Service

For all Production, Test and Training Environments, Company will follow "Release Management Procedures" in completing changes in the products or product release levels in current use and in implementing Application Patches and Upgrades (collectively "Change Events"). These Release Management Procedures will in all cases provide for the following:

- Advance notification to the Licensee of the Change Event, its nature and expected timetable;
- Written notice of application changes and modifications to screens or code;
- Pre-testing of changes, including any modifications to screen or code in Company or Licensee non-Production environments; and
- Coordination of the implementation of the Change Event with the Licensee.

Systems Configuration Health Check – As requested service

For the Licensee's Production, Test and Training environments Company will perform the following:

- Make sure that the Synergy Patching Process is being implemented consistently and is done correctly.
- Review the REV_ERROR table for issues.
- Review database tables' size and write one time and/or scheduled jobs to limit the size of tables that grow over time.
- Shrink databases if appropriate after tables are trimmed.
- Review all operating systems and database management systems updates and patches to ensure currency.

Annual Start of School Readiness Check – As requested service

- Review the results of the New Year rollover and summer school conclusion processes and any type of mass loading of feeder school student data.
- Review the application security set up to ensure appropriate changes have been made related to new staff, new or redefined roles relative to prior year, organizational changes, etc.?
- Review the application set up to ensure consistency with changes to state or federal reporting requirements, local school district Board policy changes that may become effective within the new school year, new features and functionality within the June release.
- Review of prior year's issues reported to Edupoint's support group which turned out not to be application software defects, to determine either apparent training needs or needed set up changes.

Process Consulting – As requested service

Company's process consulting services are available to Licensees, on a daily rate, which have completed the initial implementation of the new student information system and want to ensure that the system is being used in the manner necessary for the Licensee to gain maximum improvements in the daily work processes of school and district office staff. It is intended to answer questions such as:

- Are attendance clerks executing the daily and periodic attendance function in the most efficient manner, given the features and functions available in the new system?
- Are school principals fully using the information available via the new system to support their decisions regarding school operations and instructional effectiveness?
- Is district office staff fully utilizing the reporting and query capabilities of the new system to gain information needed for programmatic and departmental operations and management, or are they still asking schools to compile and report this information off-line?
- Are teachers fully utilizing the student and classroom management features of the new system's teacher portal and integrated grade book?

It is a universal fact that when presented with a new tool that assists people in the accomplishment of their work, most people will quickly learn and utilize the tools basic capabilities, but absent further stimulation or incentive, they will not explore the tools advanced features or develop the new more efficient work processes that are enabled by the new tool.

Company's process consultants will work with Licensee's school and district staff to identify work processes that are making less than full use of the new student information system, and then lead collaborative initiatives to intervene in these processes so that Licensee's school district gains maximum return on its new SIS investment.

Deliverables:

- A process review report, with recommendations, covering the functional areas of the new SIS established as the scope of the Process Consulting engagement.
- An Intervention Plan which addresses the recommendations developed during the process review engagement.

Attachment 4

NON-EMPLOYEE/AGENT ACCESS CONSENT FORM

THIS AGREEMENT is made as of _____, between <COMPANY NAME/CONTRACTOR>, <DISTRICT>, and Edupoint Educational Systems, LLC.

WHEREAS, <COMPANY NAME/CONTRACTOR> ("Contractor") is providing services for <DISTRICT>, ("District") in connection with Edupoint Educational Systems, LLC ("Edupoint") Licensed Software Products specifically set forth in Exhibit A of the Software License Agreement dated _____.

NOW, THEREFORE, in consideration of the mutual promises set forth in this Agreement, the Parties agree:

CONFIDENTIAL AND VALUABLE SUBSTANCE – Contractor recognizes that the Licensed Software Products have substantial monetary value and are considered TRADE SECRET, PROPRIETARY, and/or CONFIDENTIAL. Edupoint is desirous of maintaining rigorous control over the Licensed Software Products. Contractor, therefore, agrees that it will exercise due care to prevent disclosure of the Licensed Software Product to any third party.

1. Contractor shall ensure that any identification labels or legal notices contained in or on any of the Licensed Software Products are not altered, modified, suppressed, or in any other way made inconspicuous.
2. Contractor shall restrict access to the Licensed Software Product to only those employees of the Contractor who must have such access in order to perform their specific duties or obligations pursuant to the Contractor's business. Contractor agrees to take all necessary and proper precautions to ensure that unnecessary and unauthorized access to the Licensed Software Products by its employees does not occur.
3. Contractor agrees that it will take all reasonable precautions to ensure that non-Contractor personnel, including non-employee agents of Contractor, do not obtain access to or knowledge of the Confidential information without first obtaining the express written consent of Edupoint. Edupoint agrees that it will not unreasonably withhold such consent.
4. Contractor shall treat the ideas and expressions contained in the Licensed Software Products as TRADE SECRET, PROPRIETARY, and/or CONFIDENTIAL and belonging solely to Edupoint and shall not, without the prior written permission of Edupoint, copy or duplicate any physical embodiments of the Licensed Software Products (except as required for security and archival or escrow purposes).
5. Contractor agrees to notify Edupoint immediately, in writing, of any unauthorized possession, use, or disclosure of any of the Licensed Software Products. Contractor shall promptly furnish Edupoint with full details of such possession, use, or disclosure; assist in preventing any recurrence thereof; and cooperate with Edupoint in any litigation or other proceedings deemed necessary by Edupoint to protect Proprietor's rights.

NO LICENSE - Nothing in this Agreement is intended to grant any rights to Contractor under any patent, mask work right or copyright of Edupoint, nor shall this Agreement grant Contractor any rights in or to Confidential Information except as expressly set forth herein.

TERM - This Agreement shall survive until the termination of the License Agreement.

REMEDIES - The Contractor acknowledge that in the event of any breach or threatened or reasonably anticipated breach of this Agreement, the resulting damage to Edupoint would be difficult or impossible to quantify and remedy at law, and therefore, in addition to any other rights or remedies available hereunder, Edupoint shall be entitled to injunctive and other equitable relief and to recover from Contractor its reasonable attorneys' fees and costs incurred in connection with enforcement of this Agreement.

Edupoint License Agreement

MISCELLANEOUS - This Agreement shall bind and inure to the benefit of the parties hereto and their successors and assigns. This Agreement shall be governed by the laws of the State of California, without reference to conflict of laws principles. This document contains the entire agreement between the parties with respect to the subject matter hereof. Any failure to enforce any provision of this Agreement shall not constitute a waiver thereof or of any other provision hereof. This Agreement may not be amended, nor any obligation waived, except by a writing signed by the parties hereto.

Edupoint Educational Systems, LLC

<Company Name/Contractor>

<District>

Attachment 5

CHANGE MANAGEMENT PROCEDURE

Version 1.2

Whichever party to this Agreement identifies a potential change to the Edupoint Products or the Project Charter and Work Plan, that party will document the potential change, thereby initiating a change request under this process. The change request will be presented to the Licensee's project management for approval to proceed with an initial analysis by Company.

Once the Licensee has authorized the change request, Company will proceed with an initial analysis and complete the initial change request by specifying the change type, feasibility analysis, initial estimate of the cost to first develop detailed specifications and then implement the change, and potential impact an effort to execute the change would have on already adopted project timelines. Company will complete this initial analysis at no cost to the Licensee.

Company will present the results of the initial analysis to the Licensee's team and that team will, if it decides to move the change request forward in this process, authorize Company to proceed with the development of detailed specifications and finalization of cost and timeline impacts.

Company will, if the change request is authorized by the Licensee, proceed with the development of functional and other detailed specifications with the full aid and assistance of appropriate Licensee staff. Company will also finalize the initial cost estimate into a cost commitment, and determine the timeline required to implement the change. All of this information will be presented to the Licensee, as a final change request. Costs incurred by Company in preparation of the final change request will be applied as a credit to the actual costs of implementing the change should the Licensee move forward with the change, except in the case of custom development work. For custom development, the following guidelines apply:

1. If the Licensee authorizes completion of the customization work, the cost to create the Functional Specifications Document (FSD) will be discounted by 50 percent and will be payable upon delivery of the customization.
2. If the quote provided following receipt of the FSD approval exceeds the customization estimate by 50 percent or more, and the Licensee therefore elects not to authorize the customization, the cost of the FSD will be discounted by 50 percent.

Otherwise the Licensee will be responsible for these costs, and will pay Company as per the payment terms provided in this Agreement.

Attachment 6

DATA CENTER INFRASTRUCTURE – ANALYSIS AND DOCUMENTATION

AKA Site Survey – Contract Reference Section 4.2.a (Version 17.0)

This process description and related forms are to be used by Edupoint staff when implementing SYNERGY under either the **Self-Hosting** or **Local-Hosting** operating models (see Edupoint's Software License Agreement – Perpetual or Subscription, for details associated with these two operating models). **Note: Edupoint does not offer hosting services using the Oracle database platform.**

The purpose of this site survey is to provide assurance that SYNERGY will operate reliably when installed in a client's data center under either the **self-hosting** operating model **or** the **local hosting** operating model, but with one significant difference.

- **Under the self-hosting operating model**, while Edupoint is expected to provide sound advice and technical assistance related to the sizing, configuration, and integration of the client-purchased SYNERGY-related computing resources into the client's data center, the ultimate responsibility (operational and financial) for ensuring that the SYNERGY-related computing resources are properly sized, configured, and integrated into a properly established data center infrastructure is the clients.
- **Under the local hosting operating model**, Edupoint is contractually obligated and financially responsible for ensuring that the resulting SYNERGY-based student information system solution provides reliable services to all end users at acceptable levels of performance, even during peak load periods. Edupoint will size, configure, install, and administer the SYNERGY-based SIS solution (hardware-servers and load balancers and anything else required, systems software, third party application software if necessary, and the SYNERGY application software suite itself) and will therefore be responsible for ensuring system availability 24/7. Since the SYNERGY-based SIS solution will be physically located within the client's data center, Edupoint must take steps to be certain that the client's data center is appropriately configured prior to installing the SYNERGY-based SIS solution.

As per Section 4.2.a of Edupoint's Software License Agreement, the site survey can be performed by the client or an agent hired by the client, or at the client's request Edupoint will perform the site survey and bill the cost of the survey to the client as an additional charge. In any case, the completed site survey document establishes the baseline for the data center infrastructure. Edupoint must review the completed site survey document and either accept the survey as-is or prepare a report to the client noting the deficiencies within the data center infrastructure that the client must correct (at the client's expense) before Edupoint will install the SYNERGY-based SIS solution. Correction of deficiencies will be reflected upon the site survey, which will be signed off by both the client and Edupoint. Neither party will be allowed to modify the data center infrastructure after this sign-off without the concurrence of the other party.

The process steps for completing the site survey task are as follows:

1. Edupoint staff to prepare a preliminary configuration of the SYNERGY-based SIS solution, which is shared with the client.
2. Discuss the site survey with the client and determine how the client will complete the survey; self-survey, hire an agent to perform the survey, or ask Edupoint to complete for an additional cost (daily rate and travel expenses)?
3. Discuss with client and establish the target date for the completion of the survey.
4. When survey is complete, Edupoint staff to review the survey document, confirm the document's completeness and accuracy, note any deficiencies within the client's data center infrastructure, and determine the fit between the preliminary configuration of the SYNERGY-based solution and the client's data center infrastructure. Convey any deficiencies to the client and get agreement on the client's plan for correcting all noted deficiencies. Repeat this step if necessary.
5. Edupoint staff confirm resolution of all deficiencies and prepare the final version of the site survey, and get sign-offs by both client and Edupoint management staff. **Final configuration of the SYNERGY-based SIS solution and installation of the configuration cannot begin until the site survey is signed off.**

The elements that must be included within the site survey and the critical questions that must be answered are as follows:

- **Space** – Is there sufficient space within the data center to house the SYNERGY-based SIS solution?
- **Environmental Controls** – Are heat and humidity control systems sufficient to ensure reliable performance of the SYNERGY-based SIS solution and protect equipment from damage?
- **Electrical Power** – Are the quantity, quality, and distribution of electrical power within the data center sufficient to meet the needs of the SYNERGY-based SIS solution? Is there backup power sufficient to allow orderly shutdown of the SYNERGY-based SIS solution? Is there backup power generation capable of allowing ongoing operation of the SYNERGY-based SIS solution for protracted power outages?
- **Cable Routing** – Are there sufficient cable trays (either overhead or under raised flooring) to handle the cabling associated with the SYNERGY-based SIS solution?
- **Fire Protection** – Are there functioning smoke detectors for early warning of a developing fire? Are there fire suppression systems?
- **Security** – Is physical access to the data center adequately controlled?
- **Telecommunications Network** – What is the available capacity of routers and switches that transport traffic between servers and the outside world? What level of redundancy is built into the existing telecommunications infrastructure?
- **Data Center Management Tools** – What monitoring and management tools (software and/or hardware) are currently installed and in use in the client's data center?
- **Systems Administration Capacity** – What human resources are available to assist Edupoint in ongoing systems administration functions?
- **Disaster Recovery** – Is there a disaster recovery (aka business continuity) plan, and is it current and viable?

While in the final analysis the site survey must provide a definitive written answer to each of the above critical questions, the answer alone does not satisfy the requirements for the site survey. For each of the ten elements, documentation must either be secured or created that fully describes the current data center environment relative to each of the ten elements. This documentation will serve as the basis for the written analysis upon which the answer to each of the ten critical questions must be based.

Once the site survey is signed-off, a copy of the analysis and documentation must be secured by each party since it will serve not only as the foundation for Company's computing resources that will be installed in the data center, but also as the baseline for the resolution of future questions and/or disputes that may arise in the event system performance or reliability becomes an issue. Both parties must understand that neither party may unilaterally modify any element of the data center infrastructure, and that any modifications that are made by mutual agreement of both parties must be reflected in the baseline analysis and documentation.

Amendment 1
To
EDUPOINT SOFTWARE LICENSE AGREEMENT

SUBSCRIPTION

Version 17.0

1. Item 6.0, Choice of Law, is amended as follows:
This Agreement shall be governed by, interpreted under and construed in accordance with the internal laws of the State of Washington, without reference to the rules of conflicts of law thereof.
2. Should Licensee wish to change from a subscription license to a perpetual license in the future, Licensee shall pay the total Year 1 subscription cost of applicable modules as shown in Exhibit A. Year 1 subscription cost shall only be due for modules Licensee elects to change to perpetual licenses. Annual maintenance fees will be calculated at the time that license type change occurs and based on the current price model at that time. Company will charge a fee of \$2,000 annual fee for this subscription-to-perpetual license conversion option, however this cost will be waived for Licensee as a special Illuminate to Synergy conversion incentive.
3. At any time during the duration of this Agreement, Company shall permit Licensee to cancel this Agreement and migrate to a Cooperative Purchasing Program agreement.
4. Licensee and Company acknowledge that Company may release new products/modules in the future. Licensee may purchase license and services for any new module released by Company under the terms of this Agreement.

All other terms, conditions and provisions to the Software License Agreement remain in force and unchanged.

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Rob Wilson	President
_____ Printed Name	_____ Title

_____ Printed name	_____ Title

_____ Signature	_____ Date Signed

_____ Signature	_____ Date Signed