

IT Training Quick Reference Guide

Student Data Confirmation Site Processing



Revised – 8/3/2022

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HELP WITH PARENTS CREATING AN AERIES PORTAL ACCOUNT

The Parent Online Student Reregistration process will occur this summer via the Internet with parents using their Aeries parent portal account to reregister their kids. **So, it's imperative to encourage parents to create their Aeries parent portal account.**

Simply point them to this address; <https://sbcusd.com/parentportal>.

Here they can get all the information and help to create their account.

LETTERS TO PARENTS

DISTRICT LETTER TO PARENTS INFORMATION

There will be a District Letter from Enrollment and Placement to parents letting them know about the Parent Data Confirmation process.

- Shared student's VPC code and primary contact number
- Account set up steps
- Directions on how to create an email address
- Access to make changes to parent contact information
- Access to update annual authorizations
- Access to view student's attendance
- Access to review previous test scores CAASPP (State Testing), ELPAC (English Learners, etc.)
- Additional students from the same family can be added for enrollment in the school district.
- Cybertech's support number

SECONDARY SITE LETTERS TO PARENTS INFORMATION

There will be a School/Site Letter to parents about the Parent Portal and sign up instructions, including:

- Registration dates
- How to create a Parent Portal account
- How to create an email address
- Displays student's ID, VPC code, and primary contact number
- Contains Cybertech's support number

USING MAIL MERGE TO CREATE SITE LETTERS

1. The following resources can get help you with Mail Merge
 - https://sbcusd.com/UserFiles/Servers/Server_59869/File/District%20Offices/Information%20Technology/Tech%20Training/MS%20Word%202013/MS%20Word%20-%20Mail%20Merge%20Manual.pdf
 - <https://www.youtube.com/watch?v=do9ujnZLIC4>

USING AERIES TO PRINT MAILING LABELS, VPC CODES AND TELEPHONE

This query generates labels with the following information: To the Parent/Guardian of, First Name, Middle Name, Last Name, and Mailing Address.

1. In Aeries, click on Query in the Pages menu and enter this query string

`LIST STU "To Parent/Guardian of:" \ FN MI LN \ AD \ CY ST ZC ZX`
2. This query generates labels with the following information: Student ID, Last Name, First Name, Mailing Address, VPC Code, and Telephone.

`List STU FN LN ID \ AD \ CY ST ZC ZCX \ VPC TL`

NOTICES OF DATA CHANGES

CHANGE OF DEMOGRAPHIC INFORMATION AND CHANGE OF CONTACT INFORMATION

1. If a parent changes address, or contact information, you receive emails notifying you of these changes

NOTE – Any address changes will not happen live/immediately. Your site will be notified of the change, and your site will confirm those changes.

NOTE – Contact Enrollment and Placement, to let them know who at your site will be receiving these email notifications of data changes.

CHANGE OF MEDICAL INFORMATION

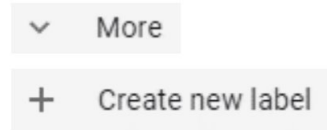
1. If a parent changes medical information, you receive emails notifying you of these changes

NOTE – Contact Enrollment and Placement, to let them know if either your site nurse or Health Services will receive these email notifications of data changes.

CREATE GMAIL LABEL TO HOUSE DATA CHANGE NOTIFICATION EMAILS

CREATING LABELS

1. Log into your **District Google account**
2. In the **left panel, click More**
3. **Click Create new label**
4. Name your label, and **click Create**

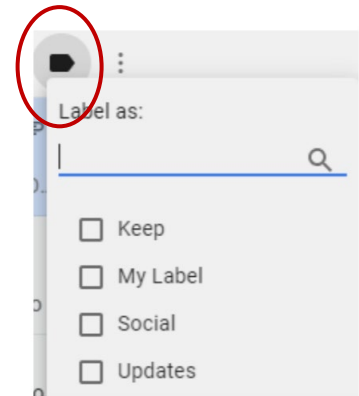


This Label will now appear in the left panel.

LABEL ASSOCIATIONS

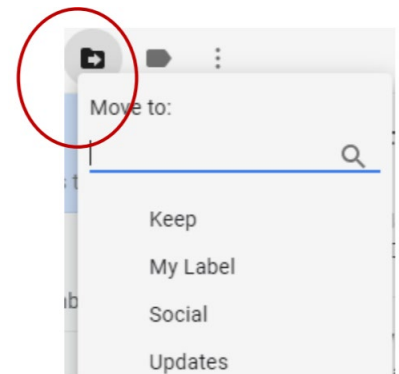
1. **Select mail messages** from your inbox
2. **Click on the Labels** button up above
3. **Choose the Label** you wish to associate the selected emails with

NOTE – Associating emails with labels does not move them to that label. It only associates the label with the email, thus making the label a simple filter for all emails associated with the label.



LABELS AS FOLDERS

1. **Select mail messages** from your inbox you wish to move to labels
2. **Click on the Move to** button up above
3. **Choose the Label** you wish to move the selected emails to



CREATE FILTER (RULE) TO FOLDER

1. **Click on the Down Arrow** in the right of the search bar to open the advanced search window
2. Create and enter any advanced search criteria you wish
3. **Click on Create Filter**
4. **Select Skip** inbox and **select Apply the Label**
5. **Choose the label** you wish to move the emails that fit these criteria into the label automatically
6. **Click on Create filter**

NOTE – This filter will work automatically upon you receiving the filtered email.

UPLOADING SITE SPECIFIC DOCUMENTS TO AERIS

UPLOADING SITE SPECIFIC DOCUMENTS

1. Contact the IT Security team <mailto:securityspecialist@sbcusd.k12.ca.us> to inform them of who at your site needs access to upload your site documents
2. In Aeries use the **Pages** menu and filter for “**SB_Portal**” and choose **SB_Portal Documents**”
3. Login username = sbc-district\firstnamelastname, example; sbc-district\whitneyhengsbach, and your District password
4. Use the Add Documents button to upload site specific documents you wish to be included in the parent data confirmation process

5. **Enter a title** for each document you upload, in both English and Spanish
6. Use the **Browse** button to **select the document/file** you wish to upload
7. Use the **comment** field to add a **brief description** for the document, in both English and Spanish
8. **Select** one of the available **Confirmation Texts**
9. **Select** whether this document should show in the **Parent Portal**, and or **Online Enrollment** (blue is selected)
10. Select **Required** if this **document is required** to open and view before proceeding in the data confirmation process
11. **Select** which **grades** this document will apply to (blue is selected)
12. **Click on Upload**

NOTE – Do not upload documents once the Student Data Confirmation window has opened. If documents are uploaded after the window opens it is possible for a parent to complete the process before such documents were uploaded.

CONTACT DATA CHANGES

The following Aeries screen – **Verified Parent/Guardian** contains the original parent guardian information per initial enrollment. This can be used to compare changes made.

VERIFIED PARENT/GUARDIAN

1. In the Aeries **Pages** menu, filter for “**verified**”
2. Select **Verified Parent Guardian**

The screenshot displays the 'Verified Parent Guardian' interface. At the top, there is a header 'Verified Parent Guardian' and a navigation bar with back and forward arrows. Below this, a student profile is shown with a blurred photo and the following fields: Student ID, State Student ID, Status Tag, and Student Number. A blue header 'Verified Parent Guardian' is followed by a list of guardian records. The first record shows a Father with a 'Mr' prefix, and the second record shows a Mother with a 'Verified Date' of 8/25/2016. Each record has an edit icon (pencil) to its left.

POST PROCESSING REPORTS

VERIFY INDIVIDUAL STUDENT DATA COMPLETION STATUS

1. To check an individual student, and which portions of data confirmation have been completed, locate the student’s record in Aeries
2. **Click on Pages** and filter for “**data confirmation log**”
3. Select **Data Confirmation Log** in the **Pages** menu

Data Confirmation Log

Test Student	
Table	Date/Time
AUT - Authorizations, Prohibitions, and Waivers	6/4/2020 11:12:49 AM
CON - Contacts	6/4/2020 11:10:52 AM
DCS - Data Confirmation Documents	6/4/2020 11:12:42 AM
FinalDataConf - FinalDataConf	6/4/2020 11:13:02 AM
MHS - Medical History	6/4/2020 11:10:55 AM
PRS - Parent Response to Survey	6/4/2020 11:10:44 AM
STU - Student Data	6/4/2020 11:10:48 AM

VERIFY INDIVIDUAL STUDENT DOCUMENTS DOWNLOAD CONFIRMATION

1. To check an individual student, locate the student’s record in Aeries
2. **Click on Pages** and filter for “**Document Download / Conf Log**”
3. Select **Document Download / Conf Log** in the **Pages** menu

Document Download / Conf Log

Test Student			
Title	Document	Action	Date/Time
Course and Grade release to Colleges and Universities	Course and Grade release English & Spanish.pdf	Confirmed Document	6/4/2020 11:12:37 AM
Military Recruiter/ Contact Authorization	Military Recruiter Form.pdf	Confirmed Document	6/4/2020 11:12:35 AM
Federal 2020-2021 Annual Low – Income Levels	INCOME Highschool Test Fee APIB Parent Letter.pdf	Confirmed Document	6/4/2020 11:12:33 AM
Valedictorian Salutatorian Selection Letter to Parents	20-21Valedictorian Salutatorian Selection Letter.pdf	Confirmed Document	6/4/2020 11:12:32 AM
High School Attendance and Grading Policy	High School Attendance Policy English & Spanish.pdf	Confirmed Document	6/4/2020 11:12:30 AM
CHS Parent and family engagement policy	2019 2020 Parent and family engagement policy.pdf	Confirmed Document	6/4/2020 11:12:28 AM
CHS Parent Compact	2019 2020 School Parent Compact.pdf	Confirmed Document	6/4/2020 11:12:27 AM

VERIFY MASS STUDENT DATA COMPLETION STATUS

1. To check on all students, **click on the Reports** menu
2. Filter for “**data confirmation**”
3. **Select Data Confirmation Status** from the **Reports** menu
4. Select the desired **report options** and **click on Run Report**

Print Information Confirmation Status Report Options

Report Format: PDF

Report Delivery: Email w/ Link

Print Which Students:

Include All Students
 Only Students Without All Data Confirmed
 Only Students With All Data Confirmed

Sort:

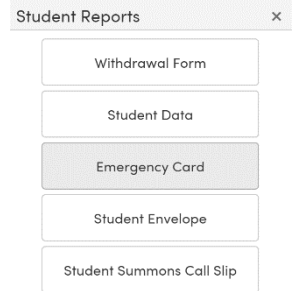
By Student Name
 By Student Grade
 By Counselor

Run Report

PRINTING EMERGENCY CARDS

PRINT INDIVIDUAL STUDENT EMERGENCY CARD

1. Locate the student’s record in Aeries
2. **Select Demographics** from the **Pages** menu
3. At the bottom of the student’s Demographics screen **click** on the **Reports** button
4. **Click on Emergency Card**
5. **Select** the desired **report options** and **click on Run Report**



PRINT MASS STUDENT EMERGENCY CARDS

1. **Select** the **Report** menu
2. Filter the **Reports** menu for “**Emergency**”
3. **Select** the desired **report options**
4. **Select Show all Students**
5. **Click Run Report**

Print Student Emergency Card Report Options

Report Format: PDF ▾

Report Delivery: Email w/ Link ▾

A KEEP/SKIP query is recommended to run this report against large schools.

Sort By:

Student Name
 Grade
 Counselor

Print Contact's Red Flag Print Authorizations
 Print Student Picture Print Student Schedule
 Print Siblings Information Print Two Signature Lines
 Print Medical Information Double Side Printing
 Include Inactive Students (blank pages are added as needed)

Select Students to be used if not all.

Show all Students (includes inactive students)

Filter by Student ID, Name, or Number...

StuID	Name	Gender	Grade
432810	Abitia, Randy	M	9
351419	Abrajan, Sergio	M	12
433754	Abreu, Rhynfel	M	9
364647	Aceituno, Alex	M	10
400526	Aceituno, Micaela	F	10
500661	Adeniji,	M	9

Total: 0