## **StudentInformation**



Tuesday, August 8, 2023

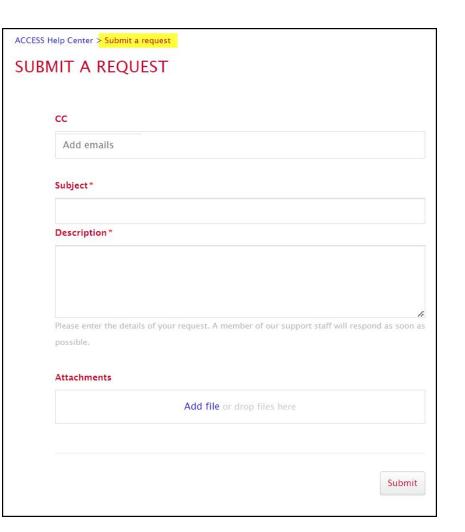
# **General Support**

Help Desk -

#### https://accessohio.zendesk.com

(sign in with Google)





## **General Support**

Help desk tickets can also be created by emailing:

- student@access-k12.org
- emis@access-k12.org
- support@access-k12.org

PLEASE include details - the more details provided, the better we are able to assist.

#### Examples:

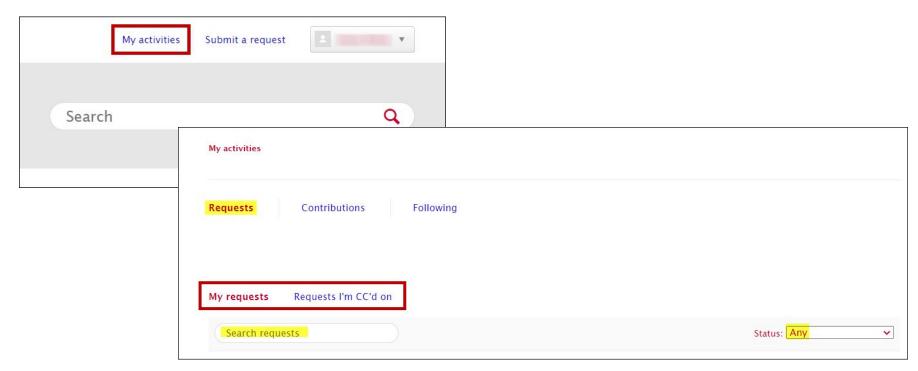
- student name/id
- specific page in the software
- error message
- replication steps

Don't leave subject blank or "scan from..."

Before submitting a ticket, please take 5-10 minutes to search documentation

# **General Support**

Find/update existing tickets (open, pending, solved)



### **Distribution Lists**

We want to ensure appropriate district staff receive email communications. Submit a help desk ticket to update distribution lists.

- New Hires (add)
- Former Employees (remove)

# New Message To ?

#### Categories

- Superintendent
- Principal
- Counselor
- EMIS Staff

- Curriculum Director
- Special Education Supervisor
- SI Users (secretaries, nurses, etc.)

## **Documentation**

#### Frontline Learning Center:



#### **Welcome!** How can we help?

0

Enter search keywords to find answers







DataMap



GradeBook: Administration



GradeBook: Teacher



ParentAccess: Administration

- **☐** StudentInformation: Documents & Learning Videos
- ☆ StudentInformation: Release Notes
- ☆ ProgressBook End User Requirements
- · StudentInformation Helpful Hints
- Studentinormation respiration
- See all 9 articles

- · StudentInformation: Procedural Checklists
- · StudentInformation: Quick References
- · StudentInformation: Enhancement and Report Request Forms

### **Documentation**

#### **ABOUT US** CONTACTUS CUSTOMERS **SERVICES** TRAINING **JOBS ALERTS** RESOURCE Training Recordings Home / Services / Student Services / Student Services Training Videos Student Services **ABOUT US** CONTACT US CUSTOMERS SERVICES TRAINING **ALERTS** RESOURCE Home ACCESS STUDENT TRAINING VIDEOS Calendar ProgressBook Suite Login Links Click here to SIGN IN. Once signed into the site, training videos on this pa **Student Services** Student Services Training Videos ProgressBook Suite Home Documentation PROGRESSBOOK SUITE DOCUMENTATION Calendar Training Videos **Training Schedule New User Training** ProgressBook Suite Login Links Home School Import - Term Click here to SIGN IN. Once signed into the site, documentation on this page will become available. Mapping reference Homerooms Training 23-24 **Student Services Training Videos** Harmony Locker Training 23-24 ProgressBook Suite Documentation Illuminate Logins & Information Importing Graduation Requirements 22-23 **Training Schedule** Student Absence Intervention FT EMIS Events Cheat Sheet **DataMap Instructional Sheets Publishing Report Cards to ParentAccess** Home School Import - Term Sample Absence Intervention Letter Template with list of absences DataMap Overview Training Part 1 Mapping reference Sample Absence Intervention Letter Template Scheduling Training Videos Harmony Sample Absence Intervention Letter Template with Summary of hours Illuminate Logins & Information Attendance Summary Sheet with Medical Column **DataMap Instructional Sheets** ProgressBook Parent and Student Mobile App Instructional Sheet Configuring User Records Creating a GradeBook Staff Member

#### ACCESS Webpage - www.access-k12.org Services > Student Services

ProgressBook Suite Documentation

## **Mobile Apps**



SIS Mobile App - "Progressbook SIS Admin"

Follows privs in SI



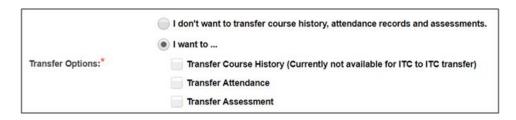
ParentAccess App - "ProgressBook Parent/Student"

## **Students**

- Share the **Admission/Withdrawal Scenarios with Appendix** (Procedural Checklist) with building secretaries and registration staff.
- Registration defaults can set at district level and copy down or set individually by building
  - Building defaults override district defaults
- Move existing students from 22-23 to 23-24 or between buildings
  - Promo/Bulk Enroll
    - 22-23 to 23-24
    - (cannot use once first day of school occurs)
  - Student Transfer / Pending Students
    - Between ACCESS districts, between buildings, between school years
  - Registration Wizard find strict / non-strict match
    - Matches on EMIS ID (if entered), DOB, Gender, Last Name, First initial of first name

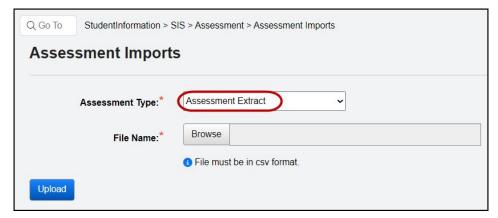
## **Student Transfer**

- Transfer between districts (Student Transfer / Pending Students)
  - When transferring students, clear out email field on General Tab
  - Can include Course History (only if ACCESS district), Attendance (External Absences)
    - SUGGESTION if using 3<sup>rd</sup> party registration software, consider transferring the student in StudentInformation *first*, then syncing that student's data from the registration software
    - BE CAREFUL if re-enrolling a student who was previously at your district. Use the "Detail" link in Pending Students if importing course history. COHI will not transfer if use Bulk option.
    - Please verify data compare transcripts with cohi.
- Marking patterns must be mapped (each year of cohi) to pull Course History
- Transfer MUST be done at time of registration cannot transfer info in later



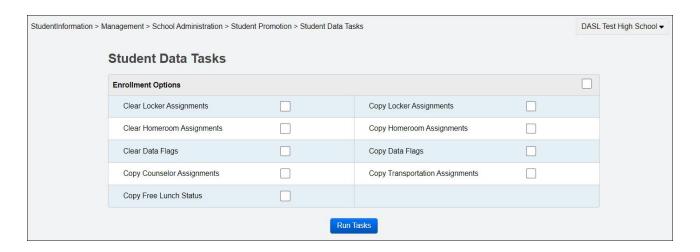
## **Student Transfer - Assessment Data**

- Sending district download Assessment information to send to new school
  - <u>StudentInformation</u> > <u>SIS</u> > <u>Assessment</u> > <u>Assessment Extract</u>
  - Save as .csv
- Receiving district Import Assessment (done at district level)
  - Must select Assessment Type = Assessment Extract



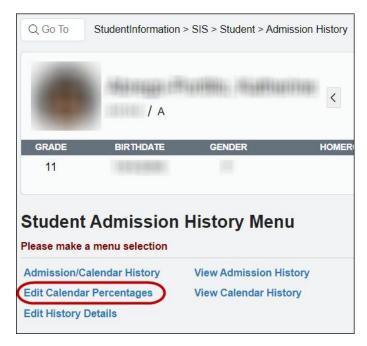
# Student - copy/clear data from prior year

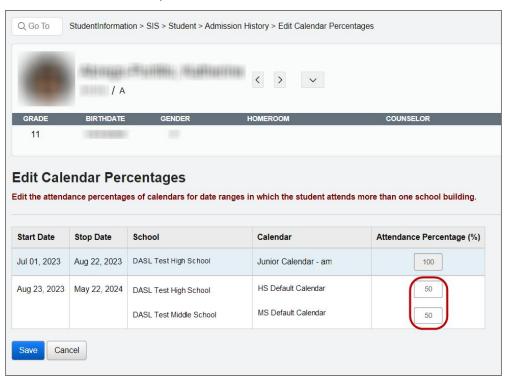
Student Data Tasks - copy/clear information after Promo/Bulk Enroll



# Students enrolled in multiple buildings

- Edit Calendar Percentages (only available at district level)
- By default set to 50% / 50% split





# **Students Missing SSIDs?**

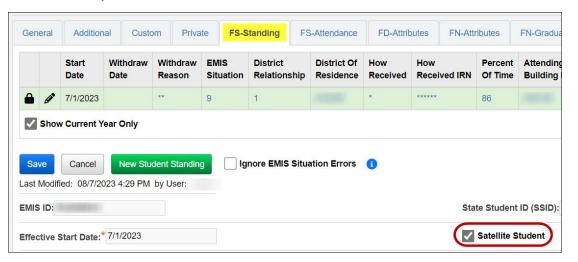
- Missing middle names
- Birthplace city not specified
- Make sure SSIDs are entered as UPPER case (everywhere SI, Assessment portal, etc.)

\*\*\*Reminder to enter data <u>exactly</u> as it appears on student's birth certificate to prevent duplicate SSIDs.

#### **Satellite Students**

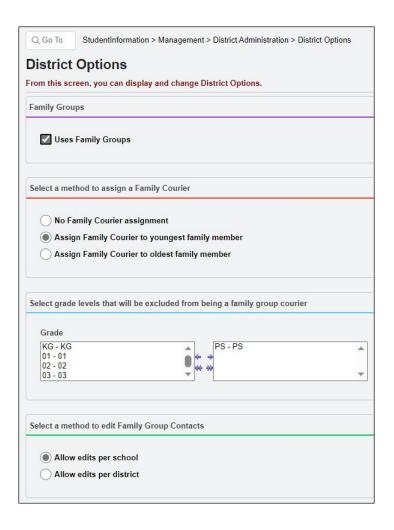
Home districts who have satellite CTC students

- Checkbox on FS-Standing tab
- For students taking satellite courses but not actually leaving the building
- If checkbox marked, attendance calculator counts students as 100% of time.



# **Family Groups**

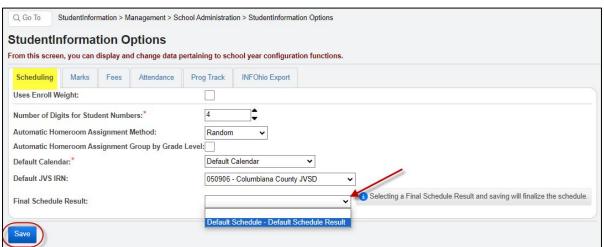
- Family Groups are optional.
  - Enabled by default.
  - Can disable Family Groups in District Options.
    - StudentInformation > Management > District
       Administration > District Options
  - If disable, existing Family Groups are not removed.
- Set Match Criteria and Courier settings
  - district level
- Reassign Family Group Courier
  - StudentInformation > Management > District
     Administration > Family Groups Wizard
- Harmony has reports that don't require Family
   Groups (keyword search = family)
  - Family Labels
  - Family Report



# **StudentInformation Options**

#### Final Schedule Result

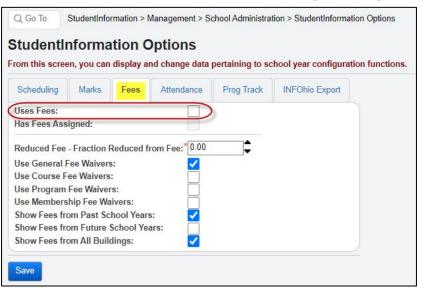
- Should not finalize before absolutely necessary (around the time of integration or when schedules are completed....whichever is later).
- Once schedule is finalized, run Wipe & New (EMIS Process). Best to do this prior to integration.



# **StudentInformation Options**

Uses Fees flag and fees settings

- Uses Fees turned off during SYI
- Proration tables setup and linked to fees as they apply



# **Security**

#### Passwords expire every 90 days

- Email/SSO Password System -
  - ACCESS webpage > More links



#### **Quick Tips**

- Frontline security is managed in StudentInformation for entire suite (SI, GB, DM)
  - Please make sure district staff know who to contact in your district for assistance
- Account Roles
  - provide access to StudentInformation (DataMap, if applicable)
- Staff Job Function
  - o provide access to GradeBook (a few menus within SI), Notifications (SI, GB, DM), and DataMap (in conjunction with Account Role)

#### Brand new employee who were never employed at an ACCESS district:

- 1. Your tech department will create the login account, and will need to provide you with the email and username
- Add the Account record via StudentInformation > Management > Security > View Accounts
- 3. Add appropriate Roles to the Account record
- 4. Click on the Staff tab and choose the "Edit Staff" button.
- 5. Update the values at the top section of the Staff record and click "Save"
- Add the appropriate Job Function at a building level for the appropriate school year

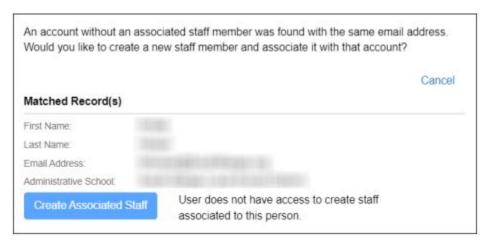
#### Staff members who are coming to your district from another ACCESS district:

- 1. Your tech department will work with the ACCESS Network staff to possibly move the existing Active Directory account. Your tech department will provide you with the email and username
- 2. SUBMIT A TICKET TO student@access-k12.org REQUESTING THE EXISTING ACCOUNT IS TRANSFERRED TO YOUR DISTRICT.
- 3. Once transferred to your district, add appropriate Roles to the Account record
- 4. Click on the Staff tab and choose the "Edit Staff" button.
- 5. Update the values at the top section of the Staff record and click "Save"
- 6. Add the appropriate Job Function at a building level for the appropriate school year
- 7. Click on the Personal tab and choose the "Edit Personal" button
- 8. Update the email address on the Personal Tab and click "Save"

#### Staff members who are employed in another district (Ex: an ESC employee):

- SUBMIT A TICKET TO student@access-k12.org ASKING THAT AN ASSOCIATED STAFF RECORD BE ADDED IN YOUR DISTRICT.
  - a. Include staff First/Last Name, email address, Staff Code in your district, State Staff ID, Primary School
  - b. Indicate which Account Roles this user should have, and for which building(s)
- Once the Staff record is created by ACCESS, add appropriate building level Job Functions

If you attempt to add a Staff Member who has an existing account in another district, you may get the following message:



Please do not create associated staff. Please submit a ticket for assistance.

## **Security - Privs**

- Report Builder Privs
- Analytics Hub Privs
- DataMap Privs (if applicable)
- Harmony Accounts
  - Harmony Account Request form (available on ACCESS site or Harmony login page)
  - Users who have left let us know to remove
  - Users who have changed positions may need an "Updated" form

# **Security**

Staff no longer employed. Did someone leave/retire?

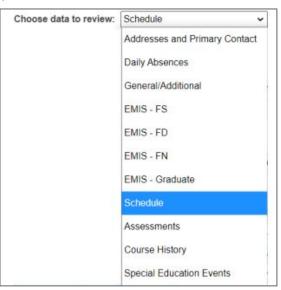
- Deactivate Account record
- Deactivate Staff member record
- Deactivate Job function

Verify/correct existing User/Staff members

Ex: Do all principals have a Staff record?

## **Security - Miscellaneous**

- SameGoal
  - Don't forget to add/remove staff
- Impersonations
  - Homeroom fee collect (elementary / possibly middle schools)
- EMIS ReadOnly Privs
  - Cannot see EMIS tabs on student profile
  - ReadOnly privs EZQ > EZ Students > EMIS Demographic



## **Annual Setup**

School Demographics screen (district and building levels)

StudentInformation > Management > School Administration > School Building Administration > School Demographics

Update administrator changes

| School Code:*  | DA                                | School Name:*             | DASL Test District         |
|--|-----------------------------------|---------------------------|----------------------------|
| School Type:*  | District ~                        | School Subtype:           | Select a School Subtype ✔  |
| RN:  | 044636 Q Public                   | Superintendent:           |                            |
| Website URL:   |                                   | District:                 | DASL Test District         |
| Student Success School Type:   | Select a School Type V            |                           |                            |
| Jse Address Standardization:   | ✓                                 | Use Address Verificat     | ion:                       |
| Telephone:   |                                   | Fax:                      |                            |
| Address:   |                                   | City:                     |                            |
| State:   | ~                                 | Zip:                      |                            |
| Feedback Email:  |                                   |                           |                            |
| Comment:   |                                   |                           |                            |
|  |                                   |                           |                            |
| Progress Book On:  | <b>▽</b>                          |                           |                            |
| Progress Book On:<br>JVS Integration On:   | <b>▽</b>                          | Select JVS Satellite Scho | pol: Select >              |
| JVS Integration On:  | Hide Absence Reasons Hide Absence |                           | bol: Select >              |
|  |                                   |                           | bol:   Select y            |
| JVS Integration On:  | Hide Absence Reasons Hide Absence |                           | ool:   Select \( \times \) |
| IVS Integration On:  EZ Query Display Options:  District Student Number Seed:                            | Hide Absence Reasons Hide Absence |                           | ool:   Select \( \times \) |
| JVS Integration On: EZ Query Display Options: District Student Number Seed: Maximum Increment from Seed: | Hide Absence Reasons Hide Absence |                           | ool:   Select \( \times \) |

## **Annual Setup**

#### Calendars

- Calendar Dates Wizard to change first/last day and start/end terms
   StudentInformation > Management > School Administration > School Building Administration > Calendar
   Dates Wizard
- Course Section Assignment Dates if changes impact course terms
   StudentInformation > Management > School Administration > Scheduling Administration > Course Section
   Assignment Dates
- EMIS Term Dates (district level) dates going to ODE (updated as part of Calendar Dates Wizard)

# **Schedule Changes**

Document on ACCESS webpage -

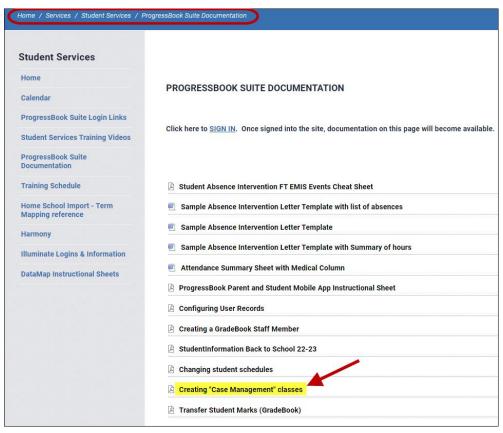
Services > Student Services > ProgressBook Suite Documentation > Changing Student Schedules

- Before the start of school, the "Drop" and "Transfer" options are disabled. You can only Remove.
- Before the schedule has been finalized, "Remove/Delete" will completely remove the assignment, instead of "locking" it
- Once finalized, schedule changes are not hard deleted

# **Case Management Classes**

Coaches, intervention specialists, etc.

- Document on ACCESS webpage
   Services > Student Services >
   ProgressBook Suite Documentation >
   Creating a Case Management Class
- Requires updates in both StudentInformation and GradeBook



## **Transcripts**

#### Many customizations available

- PE Waiver
  - Can be setup to show Y or N for all students or only display for students if Y
  - Uses Graduation Eligibility Rules (not to be confused with Grad Points)
- Graduation Seals
  - Seal of Biliteracy language/text automatic on transcript if Proficient Foreign Language selected on Graduation Points > Student Exemptions/Requirements > EMIS Graduation Elements; text line appears on bottom of transcript
    - Seal of Biliteracy program code must be re-entered each year
- Diploma Type text (ex. Honors, Career Tech, etc.)
  - Based on Diploma Type selected on FN-Graduate tab

# **Transcripts**

- National Honor Society Member (new option!)
  - Based on selection on Custom tab of student profile
  - Uses Misc Groups on the R702





- Submit a ticket if interested in adding this customized option
  - Need to know specific format of the R702 used

| Miscellaneous            |        |  |  |
|--------------------------|--------|--|--|
| Definition               | NHS    |  |  |
| National Honor Society M | Member |  |  |

# **Quick Print options**

- Print Student Schedule and Transcript from I Want To menu in student context area
  - Load Settings configured do you need new settings for the new school year?
    - Deselect "Private"
    - Select "Available in 'I Want To' Menu"
  - Make sure current year cumulative GPA has been calculated for transcripts
    - Cannot pull prior year GPA if current year GPA isn't included



#### I Want To...

- Edit This Student's Profile
- View/Edit Full Schedule
- View/Apply Fees
- View The Medical Health Log
- View This Student's Memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View A Student's Family Group
- View A Student's Discipline Incidents
- View A Student's Address History
- View Latest Report Card
- View/Print Student Transcript
- View/Print Student Schedule
- View Student Absence Intervention
- View Student Roadmap

## **Analytics Hub**

Live querying database - may take a moment to return values

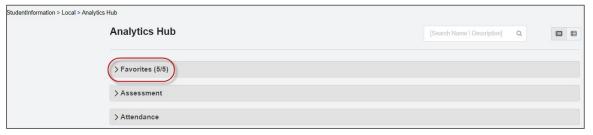
• If no data qualifies, option may not be listed – ex. status, building, grade, etc.

Can run for school years other than 2023-2024 (default)

• click into the field, backspace to clear, then type in school year (ex. 2022-2023, 2021-2022)

Each user can have up to 5 favorites – click star to add, deselect star to remove

Favorites section appears as first sections on Analytics Hub screen



With recent release, no longer have the 5 most recent reports list

## **Grad Points**

Updated information is not immediately reflected in Grad Points.

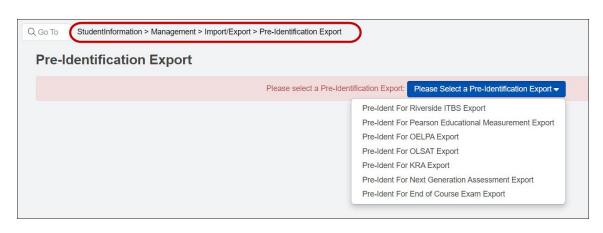
- Overnight update process
- Manually "Check for Updated Information"

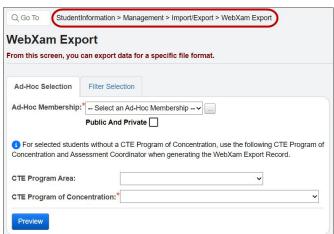


#### **Assessment Prelds**

State Assessment pre-ids can be generated from StudentInformation.

- If pre-id is available to generate from SI, should use Do not create own file.
- Procedural Checklists available for ACT, KRA, Next Gen, EOC, PS ELA, SAT
- Import/Export Guide for Riverside ITBS, Pearson Educational Measure, OELPA,
   OLSAT and WebXam





#### ∨ Assessment

#### V Non-State Pre-ID



Creates the Pre-ID file to upload for the ACT State Test day for 11th grade students.

#### ★ JVS ACT Pre-Id

Creates the Pre-ID file to upload for the ACT State Test day for 11th grade JVS students. The SchoolIRN field is derived from the Home School IRN field in StudentInformation. To be run by the JVS.

#### \* SAT Pre-ID File

Creates the Pre-ID file to upload for the SAT State Test day for 11th grade students. This report contains any 11th grade student with Percent of Time (FTE) > 0.

#### ✓ State Assessment Pre-ID

#### ★ FY23 - Preschool ELA Pre-ID Enrollment File

Creates the list of preschool teachers needed to complete the 2019 PS ELA Pre-ID process. Run this report in conjunction with the FY20 - Preschool ELA Pre-ID Student and Enrollment File reports.

#### + FY23 - Preschool ELA Pre-ID Teacher File

Creates the list of preschool teachers needed to complete the 2019 PS ELA Pre-ID process. Run this report in conjunction with the FY20 - Preschool ELA Pre-ID Student and Enrollment File reports.



#### FY23 - Preschool ELA Pre-ID Student File

Creates the 2019 Pre-ID student file for students taking the Preschool ELA Assessment. File should be saved as a CSV file.





Will be updated for FY24

# Have a wonderful 2023-2024 school year!

**Questions?**