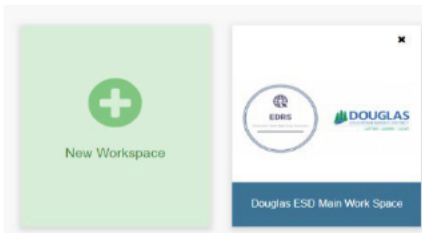
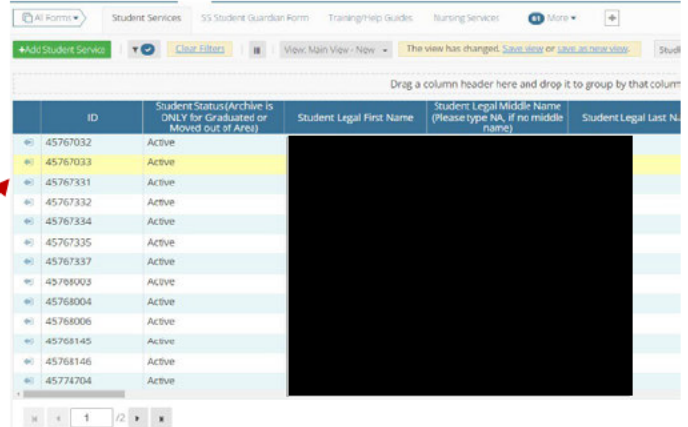


## Searching and Filtering for Students / Linking Forms to Student Services Records / Use of Temporary "Doe" Student Records

Log into Zengine - [redacted] and click on the Douglas ESD Main Workspace tile.

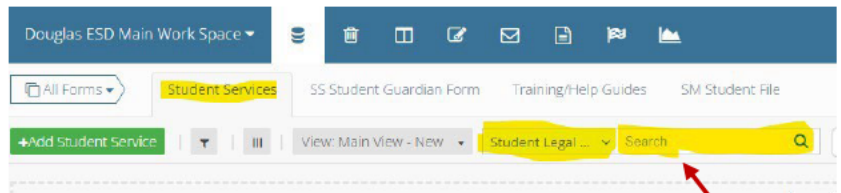


Once you have the workspace open you will be presented with a grid of all students within the Student Services tab.

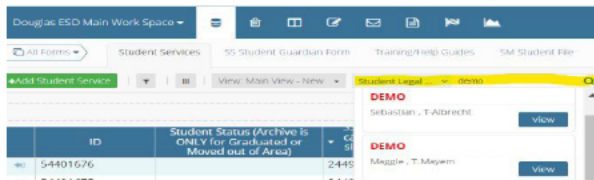


Make sure that you are on the Student Services Tab where you have venues to search for your student – the Search field or Filter process.

To Search for your student by using the dropdown search field, in the dropdown field select your search category (Legal last Name) then in the search field type what you want to find (i.e., Smith). Note that this option will only provide a maximum of 20 results unless you are searching for unique SSID number).



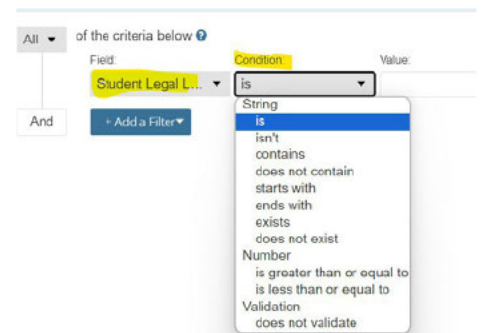
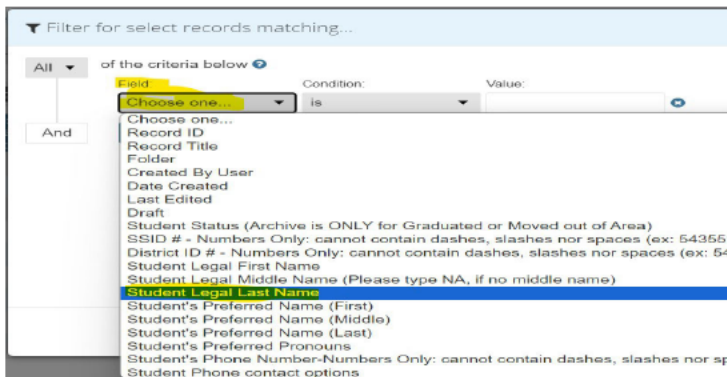
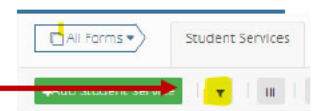
**Dropdown search fields**



**Dropdown search results**

### Filter for Student:

- In the Student Service Tab click on the filter icon (see image).
- Click on the "Choose one..." and select from the dropdown list of criteria for your search to be based on (i.e., Student Legal Last Name). See image below.



- Keep Condition as "Is" (can also use "contains" and other options).
  - Your Fields choice will impact and inform your Condition choice.

## Searching and Filtering for Students / Linking Forms to Student Services Records / Use of Temporary “Doe” Student Records

- In the **Value** field type what you are wanting to filter for (i.e., Smith).
  - Your Fields choice will impact and inform your Value choice – i.e., if it is a text box that you enter a criterion (i.e., last name) or if it is a dropdown selection option.
- If you want to tighten the scope of the filter, click “Add a Filter” to add additional Search Field, Condition, and Value options.
- Click the save Button (found at the bottom right of the filter screen).
- You will then get a list of students within Student Services that meet your filter criteria.
- Click on the Student you are looking for.
- Review and, if appropriate, edit the information associated with the student.
  - Make sure to save the form if you make any edits/changes by clicking the blue save button.

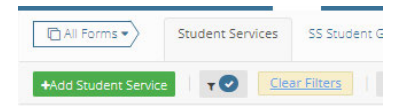


**Note:** There are students in the system who share the same legal first/last name, so please be cautious and look at other identifiers (i.e., middle name, date of birth, districts, grade level) to ensure that you are selecting the student that you want.

### Unable to locate your student?

If you still cannot find your student, you will need to manually create a student file by clicking on the **green** “Add Student Service” button in the upper left of the Student Services Tab. The following is a list of key fields. Please enter data in the non-required fields if you have the information:

- Student Legal First Name (**required field**)
- Student Legal Last Name (**required field**)
- SSID Number
- District ID Number
- Select the appropriate ESD Services.
- Assign your programs assigned staff person to the student.
- Student’s Date of Birth (**required field**)
- Student’s Gender
- Resident School District
- Resident School
- Grade Level (**required field**)
- PLAN Information



### ESD Services

ESD Based Services that the Student is Receiving

- Behavioral Intervention
- E/ECSE Early Intervention and Early Childhood Special Education
- Horizons
- JDEP Juvenile Detention Education Program
- REN Regional Educator Network
- School Nursing
- Speech Therapy
- YD Youth Development Future Ready Program
- YD Youth Development Mentor Program
- YTP - Youth Transition Program

### SLP Employee Assigned

Type to search...

When done, click the **blue** Save button (bottom left).




You are now ready to select your program form(s) located to the right (entitled Linked Records) to complete.

### Reviewing and Creating a New Program Form from the student’s Student Services record

When in the student’s Student Services record you can either review currently completed linked program specific forms or create a new program specific form. They are located on the right-hand side of the screen. Forms that are available to you will be:

- *SS Student Guardian Form* - Please complete this form or a new one any time you are aware of a guardian change.
- Program specific forms – dependent on your program. Questions about any of these forms and the information necessary should be directed to your supervisor.

To open a new/blank form that will automatically be linked to the student’s Student Services Record, click the **Green Plus sign** (  ). You are now ready to complete and save your new/blank form.

## Searching and Filtering for Students / Linking Forms to Student Services Records / Use of Temporary “Doe” Student Records

### Linking a Program Form to the student without searching for the student in Student Services

If you access your program forms via the webform link, you will need to link the form to the student before saving and closing the form.

1. In the “Student Name” field, search for your student.
  - a. Type the last name, first name, or a combination of the two. **Note:** note the space between the last name and the comma. When typing in your search that space is very important if searching via last name/first name.
2. Click the name of the student that you want. This will autofill several student specific fields (i.e., name, grade, district, gender, etc.)
3. Complete the form.
4. Click the **blue** Save button (bottom left).

Student Name: \*

- T-Augustus , Silas
- T-Baggins , Ophelia
- T-Baladi , Abigaile
- T-Balenciaga , Waylen
- T-Baluchon , Cienna
- T-Bamford , Gael
- T-Bardot , Gabrianna
- T-Barlowe , Alden**

Save New BH-Behavior In... +

You have successfully completed a program form and linked it to your student.

### Process for when you did not get the student’s name but have a program form to complete.

Although not all programs will have a Student Services designated “Doe” student record associated with their program, it is a strong belief that all users should be aware of the existence and purpose of these *temporary* student records.

The ability to have a **temporary** student, allows for your program to have an additional means of tracking and measuring your interactions with students in your assigned district; particularly when you are unable to capture/ascertain the students’ name. In addition, when completing a program form and you do not know who the student is (and you did not ask for their name) or the area is not secure to have student demographic information on your screen, there is an option to link the form to a district specific “Doe” student by specific ESD program.

The naming configuration for these temporary students is: Program initial space dash space Doe space District name (i.e. BH – Doe Days Creek). There are “Doe” Student Service records for each district and for the following programs:

- Behavior Services – example of temporary “Doe” student: BH - Doe Winston-Dillard (BH – Doe = first name; Winston- Dillard = last name)
- Nursing Services – example of temporary “Doe” student: NS - Doe Oakland (BH – Doe = first name; Oakland = last name)

**To search** for one of these students (these are prebuilt for using as your temp student, DO NOT CREATE EXTRA):

**Within Student Services** – If you want the temporary “Doe” record search to come up with only those associated with your program (your department in Zengine), make sure to include your program initials (i.e., “NS –” [must have a space after NS and the dash for this to work]).

1. In the **search bar** search by Legal First Name: Doe | or by Legal Last Name (enter the school district that you want) (note that this search feature will only provide a listing of the first 20 entries).

#### [Search by Legal First Name](#)

Student Services | SS Student Guardian Form | Training/Help Guides | Nursing Services | More

NS - DOE  
Winston-Dillard, NS - DOE

#### [Search by Legal Last Name](#)

Student Legal L... | days creek

DAYS CREEK  
Days Creek, NS - DOE

## Searching and Filtering for Students / Linking Forms to Student Services Records / Use of Temporary “Doe” Student Records

2. In the **Filter screen**, to find all the “Doe” students, you can filter by “Legal First Name” or “Legal Last Name”. This option will provide a listing of all “Doe” students in the system, based on your filter criteria.
3. **Within your Program Form** (a new blank form used by your department), in the search field type your search parameters (district name for last name, or BH – Doe, or Doe).

The screenshot shows a filter interface with a search bar at the top containing the text "Filter for select records matching...". Below the search bar, there is a section for adding filters. It includes a dropdown menu set to "All", a label "of the criteria below", and a table with columns for "Field", "Condition", and "Value". The table contains one row: "Student Legal Fl..." in the Field column, "contains" in the Condition column, and "Doe" in the Value column. Below the table is a button labeled "+ Add a Filter". Underneath the filter section is a search field with the text "days c" and a list of results: "Clear Selection", "Create New", "Days Creek, BH - DOE", and "Days Creek, NS - DOE".

### **Expectations Regarding the temporary “Doe” student:**

For those programs who might utilize a “Doe” student record, it is expected by your program manager/administrative staff and EID support that if you utilize a “Doe” student record that **you will**:

1. Utilize the Notes section of your form to include enough information about the students to help identify them later.
  - a. i.e., I think the student’s first name was Allie; the child had a pink sweater, and a white bow in her hair, was maybe a 2<sup>nd</sup> grader and wore glasses.
2. Make every effort, in a timely fashion, to go back to your program form and relink to the real and appropriate student.
3. EID staff and/or your program administrative assistant will assist in the monitoring and use of the “Doe” student and help you identify which forms you completed so you can go back and try to properly link to the correct student.
4. The use of the “Doe” student ***is not to replace proper processes for searching for and properly linking*** your program forms to the correct student. It is a temporary “catch-most” tool and, at minimum, a way to capture and account for the few instances of “I did not catch that student’s name”.

**Disclaimer:** This document does not cover all instances regarding the numerous ways to use the search and filter criteria and categories that are available to the user based on the forms being searched. Individual forms will impact and inform available search and filter criteria and categories (i.e., district, school, assigned staff, ESD based services, etc.). It is expected that users will learn the system, exhaust all search/filter options, use their assigned school district’s Student Information System and district staff available to them for ascertaining the correct spelling of student names and other student demographics. It is also expected that users will reach out to EID staff and program support when in need of assistance in locating student information and forms within the system, or with system processes.