



Focus University Training Document

Focus Training: *Updating Student Information and Adding In-District Transfer Students*

2016

Training Agenda

- **Updating Student Data (i.e. from Yellow Card)**
 - General Demographic fields
 - Custody Alert/Issues
 - Addresses and Contacts
- **Adding Students**
 - In-District Transfers/Migrant Non-Attendees/New Charter Students
 - Adding Inactive Students
 - Active at another School
 - Adding a “Second School” Enrollment record
- **Withdrawing Students**
 - Enrollment Screen
 - View Screen
 - Withdraw Forms
- **Add/Drop Report**

Purpose: The purpose of this training is to help users to understand the process for adding students that transfer between schools and updating student information collected on the Yellow Card. Additionally, users will learn how to add a second school of enrollment as well as withdraw students in Focus.

Objectives: At the end of this training, users will be able to

- Add a student who has transferred from another Collier County School
- Update specific student information fields
- Withdraw a student
- View and filter the Add/Drop Report

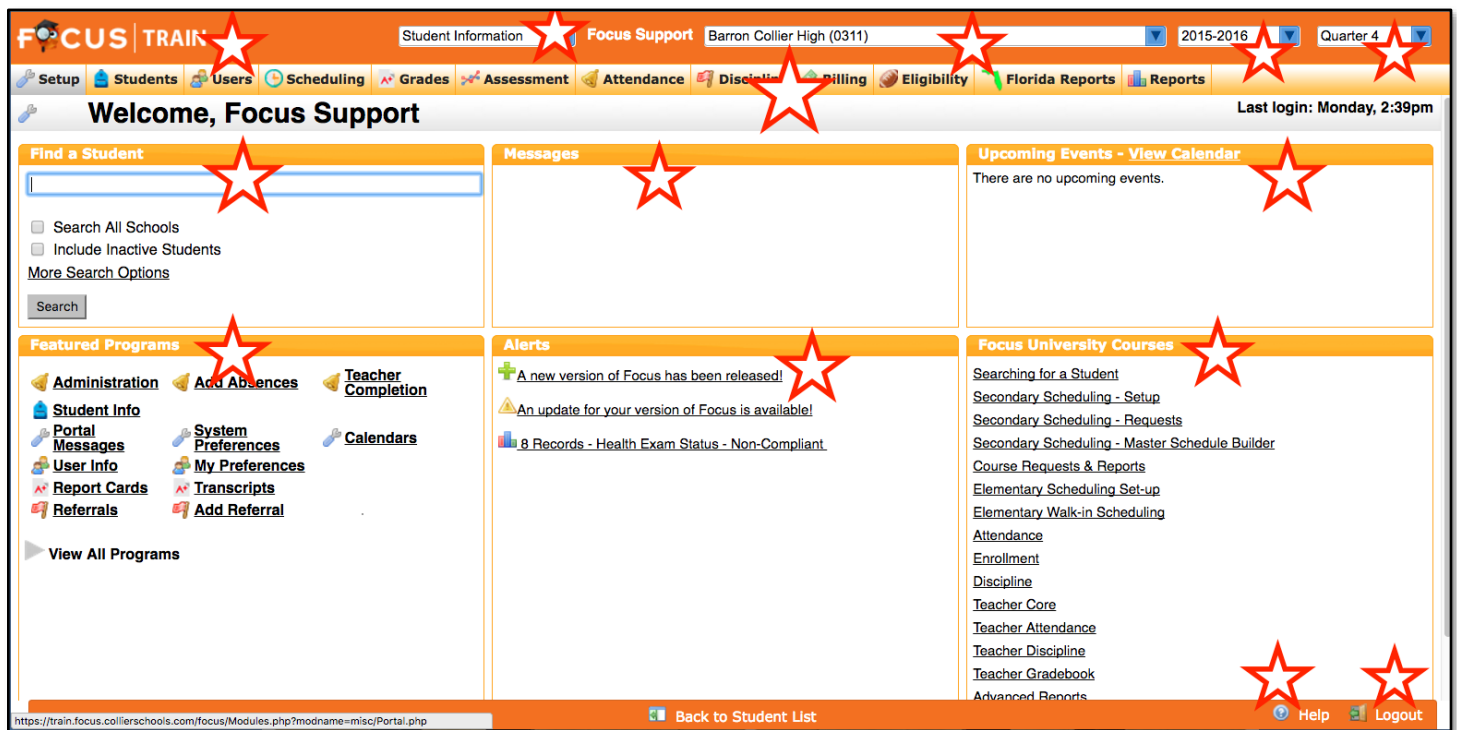
Training Site URL:

(Use Chrome or Firefox only)

train.focus.collierschools.com

Survey Monkey Link:

Focus Review:



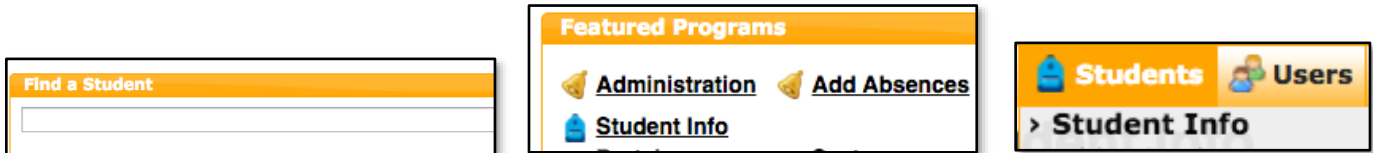
Identify the Portal feature that:

- 1 Allows users to search for students using part of the student name.
- 2 Provides a link to the calendar viewed by all school users.
- 3 Properly exits the user from the application.
- 4 Displays the term pull-down menu, which defaults to the current marking period.
- 5 Provides information on new referrals, teachers taking attendance, and new enrollments.
- 6 Provides links to documentation, recorded webinars and videos in Focus University.
- 7 Different schools will display in this pull-down menu when the user has rights to more than one school.
- 8 Refocuses the user to the home portal page.
- 9 Provides links to specific menu options.
- 10 Provides district and school personnel a location to post messages to a group of users.
- 11 Allows users to view the active school year, future and previous school years.
- 12 Displays as a pull-down menu if the user has more than one profile assigned to them.
- 13 Displays icons to represent all drop menus and features available in Focus.
- 14 Provides on-screen documentation about any topic on any page in Focus.

Updating Student Information

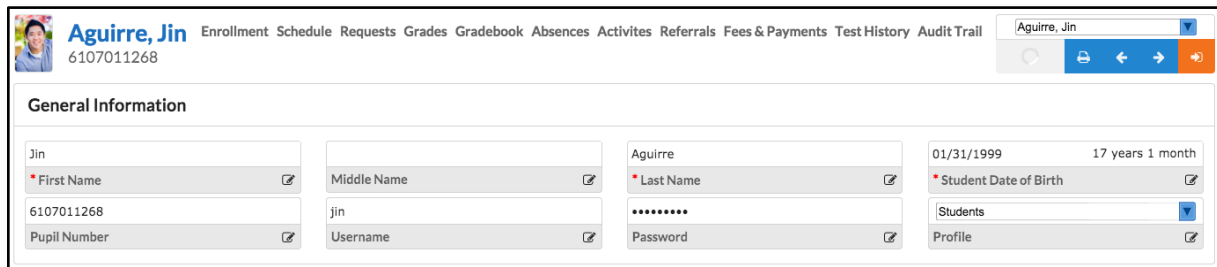
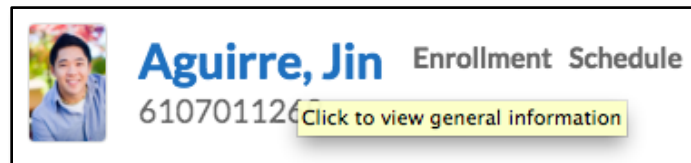
At the beginning of the school year and periodically, it may be necessary to make changes to a student's **Demographic information** such as emergency contacts, custody information, home or mailing addresses and phone numbers. To update these fields:

- Locate the student by name or ID number from the Portal **Find a Student** search screen, the **Student Info** link in **Featured Programs**, or from the **Students menu > Student Info**



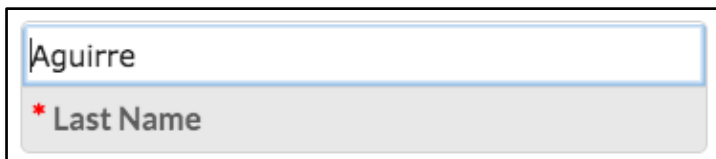
To update General Demographic Information

- Click on the student's name to view general information such as name and birthdate:



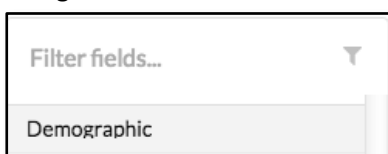
(Click on the name again to close the box)

- Update any changes by clicking into the white box above the field name and entering new data. *Click Save.*



To update or add Custody Issues

- Click on the **Demographic** tab on the left and then scroll down to the **Custody** fields to enter any new or changed information.



Demographic	
	Student Lives With
	Custody Alert
	Custody Issues ☐

Click the Save button to preserve changes.

To Change the *Student's* Primary Residential Address

- Click on the **Addresses & Contacts** tab to update or enter new information. Each Address or Contact appears on its own "card."

Filter fields...

Addresses & Contacts
Behavior Plan
Classified
Counselor
Daily Med Schedule

Addresses & Contacts


Address


P.O. Box 738, 2836 Nunc St.
Clarksburg, FL 72997
(150) 855-8628




A blue star indicates the address is the Primary Address while the orange envelope denotes a Mailing Address:



NOTE: "Primary" is used to denote the student's primary residential address, not the parent's.

- Click on the desired address "card" to edit the address information. A pop-up window will display.
- Edit the address including denoting whether it is the primary and/or mailing address.
- If applicable, edit the telephone number.

Edit Address

☐ Callout
☐ Unlisted
☐ Blocked

Validate Address

Zoned Schools

Delete
Cancel
Save

Options

☒ Primary Residence
☐ Mailing Address

- Click the green Save button.
- Click the blue **Validate Address** button to ensure the new address is zoned for the school.

Focus Training: *Updating Student Information and Adding In-District Transfer Students*

If the changed address **is validated**, a list of the zoned schools will display below the Validate Address button.

Validate Address

Zoned Schools

Export:  

Filters: OFF

Title ▾	Type ▾	Code ▾	Phone Number
Focus Elementary School	Elementary School	0060	(727) 388-6000
Focus Middle School	Middle School	0053	(727) 388-6000
Focus High School	High School	0125	(727) 388-6000

If the changed address **is not validated**, a message box will pop up providing the reason. The district has specific situations where users may override a non-validated address. If one of these situations exist, (i.e. due to ESE placement):

- Select the **Override Reason: [Y]** from the drop down and then click the **Override** button.

Edit Address

The address is not in the address catalog

Override Reason

A - Controlled Open Enrollment ▾

Override

If the override is successful, a green checkmark will display in place of the Override button.

The address is not in the address catalog

Override Reason

A - Controlled Open Enrollment ▾

✓

If the address is invalid due to an error in data entry, re-enter the address and click the blue Validate Address button to verify that the address is in the school's attendance zone.

- Click the green **Save** button at the bottom right corner to complete the update once the address has been successfully validated.

Cancel or Save

NOTE: if the address is invalid, users will not be able to save the record unless the Override button is clicked.

Delete

Unable to save form

Cancel or Save

To Add an Address that is NOT the student's primary residential address

When an address needs to be added to a student's record in addition to the current primary address (such as a mailing address):

- Locate the student by name or ID
- Scroll to and click on the **Addresses & Contacts** tab
- Click on the green button with the + sign

- Select “Add an Address”:

- Enter the address information. Since this new address **IS NOT** the student's primary residential address, **DO NOT** select the Primary Residence slider even if it is the contact person's primary address.
- If the address is a mailing address, select the Mailing Address slider
- If applicable, include new telephone number and choose Callout, Unlisted or Blocked (or leave all unchecked)
- Click the green Save button.

If the new address is a mailing address, a new “address card” will display with the orange envelope icon.

To add a Contact name to a new or existing address

In the event that an address needs to have a parent or other contact person's name attached:

- Locate the student by name or ID
- Scroll to and click on the **Addresses & Contacts** tab
- Click on the green button with the + sign

- Select "Add a Contact":

1. Enter the contact's name details.
2. Select the contact's relationship from the pull down menu.
3. Use the sliders to select the contact's designations for Custody, Emergency and/or Pick up status if applicable.
4. Select a phone title from the pull down and then enter the number in the next field.
5. Click on the address card to which the contact is connected.
6. Click Save. (Repeat 1, 5 and 6 to add same contact to an additional existing address.)

To add a Contact with no address

Sometimes student contacts may be a relative or neighbor for whom an address is not necessary. In this event,

- Follow the steps from page 6 except
- at Step 5, select the “No Address” card and then click Save.

To change an existing Contact(s) name, relationship or phone number(s)

If the parent’s name has changed, (i.e. mother’s married or maiden name is changed) or a parent’s name needs to be removed from the student’s primary address, or a phone number has been added or changed:

- Locate the student by name or ID
- Scroll to and click on the **Addresses & Contacts** tab
- Locate the address card to which the name or phone number to be changed is attached and **click on the contact’s name**

An “Edit Contact” box will pop up.

- Edit the desired information. Use the “--” to remove phone numbers or type in the open text fields to change or add new numbers. If **Custody, Emergency or Pick up** has changed, use the slider to make changes.

Focus Training: *Updating Student Information and Adding In-District Transfer Students*

- If a parent/contact needs to be removed from this address card, click on the **Delete** button at the bottom left.

Contact Address Click to move this contact to a different address

675 New Road South
Apt. 101
St. Petersburg, FL
33701
(829) 897-0822

No Address

Delete

- Click the Save button to preserve changes.

Activity

- Add a mailing address to a student's record
- Add an emergency contact to the student's record
- Add a new contact to an existing address

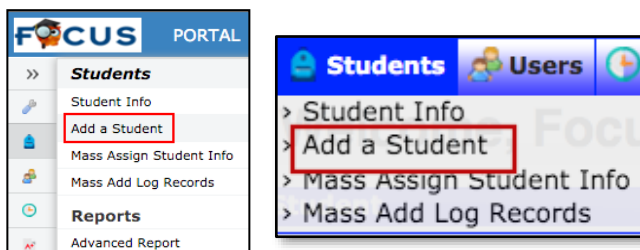
General Information for Adding Newly Registered or Transfer Students

All students **new to CCPS** or **new applicants (not CCPS transfers)** to **Charter Schools** must be enrolled through *Centralized Registration*. Once the student has been added through this process, they are automatically created in FOCUS with minimal demographic and enrollment information.

- Users will see a **Portal Alert** indicating new enrollments.
- Click on the **Portal Alert** or go to **Students > Add/Drop Report** to see the new enrollments.
- Click on the student's name to complete any additional enrollment information, including creating a schedule for the student.

Students transferring from another Collier district school must be located via the Add a Student feature.

1. Go to the **Students Menu** and select **Add a Student**.



Focus Training: Updating Student Information and Adding In-District Transfer Students

To make sure the student is in the database, has a valid address or is not actively enrolled at another school:

- Type in any of the following combinations: the *student's First and Last Name*, *Name and Birthdate* OR *Name and SSN*
- Click the blue **Search** button.

maria
* First Name

Middle Name

* Birthdate

garcia
* Last Name

Suffix

Local Student ID

Social Security

Username

Password

Students ▼

Profile

Search

If only one student appears in the list after clicking Search and they are not enrolled at another school or they show a withdrawal code from a previous school (*Inactive student for less than 10 days*) and the address appears correct:

- Click on the **Enroll** button from this screen.

maria
* First Name

Middle Name

* Birthdate

garcia
* Last Name

Suffix

Local Student ID

Social Security

Username

Password

Students ▼

Profile

Search

Expert: OFF Filters: OFF

Photo	Name	Username	Birthdate	Local ID	School	Enrollment Date	Enrollment Code	Drop Date	Drop Code	Grade Level	Address
	Garcia, Maria Dolores	029544	01/06/1976	029544							P.O. BOX 1463 , Immokalee, FL 341431463

View Enroll

The user will be directed to the address page.

- Verify the address information
- Use the *Options* sliders to designate the address as **the student's Primary Residence** or *Mailing Address*
- Enter a phone number if applicable

Return To Search

Save

1414 N Plum St

Address Line 2

Immokalee FL 341422120

0

☐ Callout ☐ Unlisted ☐ Blocked

Options

☒ Primary Residence

☐ Mailing Address

NOTE: since the district is using the Address Catalog, the system will inform the user if the address is valid for the school of enrollment and a list of zoned schools will populate below the phone number. If the address is invalid but the student meets one of the district's situations for overriding, select the *Override* code and click the *Override* button (see page 5).

If the address is valid for the school of enrollment (or was successfully overridden) users will see **Enrollment Options** with a box checked for the school the student is being added to.

Focus Training: Updating Student Information and Adding In-District Transfer Students

- Enter the **Enrollment code**
- Enter the **Grade level**.
- The *Enrollment Date*, *Prior District*, *State* and *Country* are auto-populated and may need to be updated. Scroll down to update these fields if applicable.
- Click the **Save** button.

A pop-up will appear to notify the user that the Transfer was successful.

- Click **Go To Student** (will default to student's demographic page where additional information can be added.)

- Add or Update any additional enrollment information as required.

Note: If necessary, go to pages 6-9 for instructions to add additional addresses and/or contacts for the student.

If more than one student is returned, users may:

- Look at the address listed and if it matches the student being added, click the **Enroll** button (see page 10-11); **OR**

Focus Training: Updating Student Information and Adding In-District Transfer Students

- Click on **View** to be directed to the **Student's Info** page to verify whether this is the correct student or not.

NOTE: the student info page will open in a new window; close the window to return to this screen

Photo	Name	Username	Birthdate	Local ID	School	Enrollment Date	Enrollment Code	Drop Date	Drop Code	Grade Level	Address
	Garcia, Maria Dolores	029544	01/06/1976	029544							P.O. BOX 1463 , Immokalee, FL 341431463
	Garcia, Maria L	029545	12/19/1975	029545							5002 LAKE TRAFFORD ROAD , Immokalee, FL

- On the next screen, click on the student's name to view the full name, birthdate, etc. to verify their identity.

Garcia, Maria Dolores 29544

Enrollment Schedule Requests Grades Gradebook Absences Activities Referrals Fees & Payments Test History Audit Trail

Save

General Information

Maria
* First Name

01/06/1976 40 years 2 months
* Birthdate

Password

Dolores
Middle Name

029544
Local Student ID

Garcia
* Last Name

Social Security

Suffix

029544
Username

Profile

- If this is the correct student, close the pop up window to return to the Add a Student screen.
- Click the **Enroll** button.
- See page 10-11 to complete the process.

****If no match is found, or the student has been Inactive for 10 school days, the student must go through Centralized Registration.****

ACTIVITY

Find an Inactive Student and enroll them at your school. Be sure to enter the Grade Level, Enrollment Date and Enrollment Code. Add an address and additional contact.

Currently Active Student (Beginning August 2016)

When searching for possible matches in the Student Fields of **Add a Student**, a match was found in the list below and the student **IS** enrolled in another school.

- Contact the other district school and request for the student to be withdrawn.
- Only after the student is withdrawn from the other school can the user add the student. The user will then follow the instructions on pages 9-11 as applies to the student.

Photo	Name	Username	Birthdate	Local ID	School	Start Date	Enrollment Code	Drop Date	Drop Code	Grade Level	Address
	Barlow, Aquila	6103005391	10/02/1986	6103005391	Focus Middle School - 0053	08/10/2015	E01			07	7635 Malesuada Rd.

****NOTE: Starting AUGUST 2016, the withdrawal date and the enrollment date cannot be the same date except at the school where the student only attended for that 1 day.
The last date of the student's attendance should be entered as the withdrawal date.****

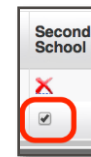
Entering A Second School Enrollment for a Student

There are times that a student will be attending two schools during the same school year (e.g. middle school student taking classes at a high school or high school student taking classes at the Technical School or College campus Focus has a "Second School" feature that allows the two schools to view the student's schedule, attendance and grades from both schools. The home/primary campus must complete the process of adding a **Second School of Enrollment** record.

- To set the "Second School", navigate to the student's **Enrollment Record**.

Year	1	2	3	4	5	6	7	8	9	10	11	12
Year	School	Grade Level	Start Date	End Date	Enrollment Code	Drop Code	Prior District	Prior State	Prior Country	Educational Level		
2015-2016	Futurama High School	09	01/04/2016				61 - Suwan...	Florida	United States	Z - Not A		
2015-2016	Focus High School	09	08/24/2015	01/01/2016	E02 Fm Public...	(W70) L...			United States			

1. Enter the correct school year and 2nd school of enrollment.
2. Set the appropriate grade level.
3. Enter the new enrollment start date.
4. Choose the enrollment code.
5. Scroll to the right to the Second School field and check the box.
6. Click SAVE.



The "second school" can now see the student and create the schedule if applicable.

Withdrawing a Student (Starting August 2016)

When a student is withdrawn from a school, the student's status becomes **Inactive** in the district's database. The proper way to withdraw a student is to create a withdrawal in the student's enrollment record. The withdrawal process **will not** delete the student's record.

NOTE: It is important to note that the withdraw date MUST be DIFFERENT from the enrollment date unless the student only attended for the 1st day of enrollment! The withdraw date is when the student becomes inactive in the system. The withdraw date is inclusive, so the student will stay active through that withdraw date listed. If School A withdraws the student on Wednesday, School B will not be able to enroll the student until Thursday. If School B must enroll the student on Wednesday then School A can backdate the withdrawal date to Tuesday, but this is NOT recommended by Focus because the records will be inaccurate (unless Tuesday was actually the student's last date of attendance).

- To withdraw a student, click **Students > Student Info**
- Search for and select the student to withdraw.
- Click on the student's **Enrollment** tab.

Withdraw through Enrollment Screen

- From the current year's enrollment field, scroll to and set the appropriate **End Date** and **Drop Code** from the drop-down menu
- Click **SAVE**. Notice the changed fields are in yellow.

Year	School	Grade Level	Start Date	End Date	Enrollment Code	Drop Code	Prior District	Prior State	Prior
2015-2016	Focus High School	09	08/24/2015	12/18/2015	E02 Fm Pub...	Moved from District	81 - Suwan...	Florida	Unit...
2014-2015	Focus High School	06	11/01/2011	05/06/2012					
2013-2014	Focus Middle School	06	08/23/2010	10/29/2010					
2012-2013	Extra Focus School 5	05	08/24/2009	06/09/2010					
2011-2012	Extra Focus School 5	04	08/18/2008	08/18/2008					
2011-2012	Extra Focus School 5	04	10/27/2008	05/30/2009					
2010-2011	Focus Elementary School	03	08/20/2007	05/31/2008					
2009-2010	Focus Elementary School	02	08/10/2006	05/25/2007					

The user will be prompted with a pop up to confirm the correct date has been entered.

- Click on **Change Date**

Confirm Date Change

Are you sure you want to change the End Date from to 12/18/2015?

Cancel or Change Date

NOTE: The schedule should be dropped if the user does not want the Scheduler to automatically reschedule the student into the same sections if the student returns.

- Navigate to the student's schedule
- Enter the drop date for each course individually or use the Mass Update feature to drop all courses at one time
- Click Save

Withdraw through View Screen

Another way to edit the student's enrollment record is by clicking the **View** button next to the appropriate enrollment record.

The screenshot shows the student profile for Aguirre, Dennis (ID: 6104005977). The 'Enrollment' tab is active. A table lists enrollment records for the years 2015-2016, 2015-2016, and 2014-2015. The 'View' button is highlighted in the first row of the table. The 'Errors' section on the right lists several issues: Vocational Single Parent, Bullied or Harassed - Disability, and Bullied or Harassed - Race.

Once the user clicks **View**, the user can edit the **End date** and **Drop code**. Notice changes made will turn the field background to blue (see **End Date**). Once the proper adjustments are made, be sure to click **Save**.

The screenshot shows the 'View' screen for the enrollment record. The 'End Date' and 'Drop Code' fields are highlighted in blue, indicating they are editable. The 'Save' button is highlighted in red. The 'Errors' section on the right lists several issues: Vocational Single Parent, Bullied or Harassed - Disability, Bullied or Harassed - Race, Bullied or Harassed - Sex, School-Related Arrests, HI Local Field, and Exceptional Student, 60-Day Exception.

The user will be prompted with a pop up to confirm the correct date has been entered.

- Click **Change Date**.

The screenshot shows a 'Confirm Date Change' pop-up dialog. It asks: 'Are you sure you want to change the End Date from to 12/18/2015?'. There are 'Cancel' and 'Change Date' buttons at the bottom right.

**NOTES:

- Anytime students are withdrawn with the WO4 code, a note **MUST** be entered on the Demographic tab explaining why and an email **MUST** be sent to Danielle Gilman with that information.
- Students Inactive for 10 school days must be processed through Central Registration before being transferred to a school.
- If a student is assigned to the school via Central Registration but actually enrolls at a different school due to an address change since registration, the current school can simply delete the enrollment record by clicking on the minus sign in front of the VIEW tab.

Withdraw Forms through Student menu

If the district has a Withdraw Form Template available in Focus, the user can create a withdrawal form for a student.

- Go to **Students > Student Info.**
- Search for and select the desired student.
- On the student's record select the **Demographic** menu.
- From the **Print a Form/Letter** pull down at the right, select the appropriate Withdrawal Form.

The screenshot shows the Focus School Software interface for a student named Abbott, Tyler (ID: 6105008223). The 'Demographic' menu is selected in the left sidebar. The 'Print a Form/Letter' dropdown menu is open, showing options: 'Print a Form/Letter', 'Withdrawal Form - Gradebook Grades', 'Withdrawal Form - Report Card Grades', 'Certificate', 'Lunch PIN Letter', and 'Missing Birthdate Verification'.

- Preview the letter to ensure accuracy.
- Select "Send to Student Log" to document that the letter was created (optional).
- Select the Print icon to print the Withdraw Form or the disk icon to download the form.

ACTIVITY

Work with a shoulder mate to complete this activity.

Partner #1: Withdraw any student from your school using the previous day's date. Be sure to include an End Date and Drop Code. Drop the student's schedule.

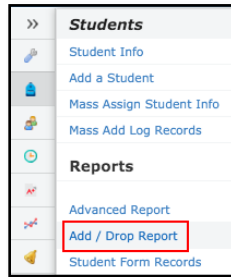
Partner #2: Search for and enroll the student your partner just withdrew. Go to the student's schedule screen and click "View Inactive Courses" to replicate the schedule.

Switch roles

Add/Drop Report

Focus has a built-in **Add/Drop Report** that displays all students that have been enrolled into or withdrawn from the school within a user-defined time frame. *Some users may see a portal alert indicating # New Students or # Withdrawn Students; both of these alerts link to the Add/Drop Report.*

- From the **Students Menu**, click on **Add/Drop Report**.

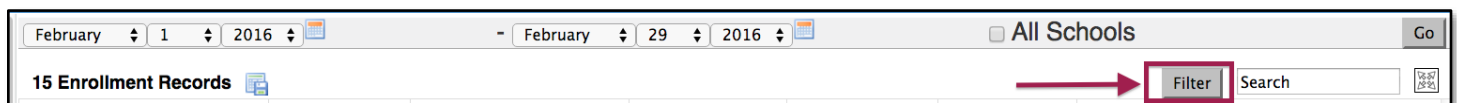


- Select the desired time frame for viewing the report data using the calendar drop downs or the calendar icon.
- Click **GO**.
- If desired, click on any column header to sort the report.
- Download as an excel spreadsheet or pdf.

February	1	2016	← →	February	29	2016	☐ All Schools	Go
15 Enrollment Records Filter Search								
Student	Student ID	School	Grade Level	Enrolled	Dropped	Reason		
		Golden Gate Middle	06	Feb 11, 2016		(E09) From Out of Country		
		Golden Gate Middle	08	Feb 10, 2016		(E09) From Out of Country		
		Golden Gate Middle	07		Feb 9, 2016	(W02) In District Transfer		

To Display Enrolled Records Only

STEP 1: Click the Filter button



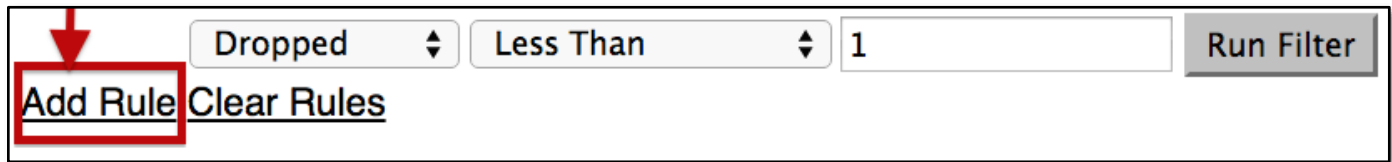
STEP 2: Set the **Filter Rules: Dropped > Less Than > 1**
Then click **Run Filter**.

FILTER RULES			
Dropped	Less Than	1	Run Filter

To see Dropped records only, select Enrolled for the first box

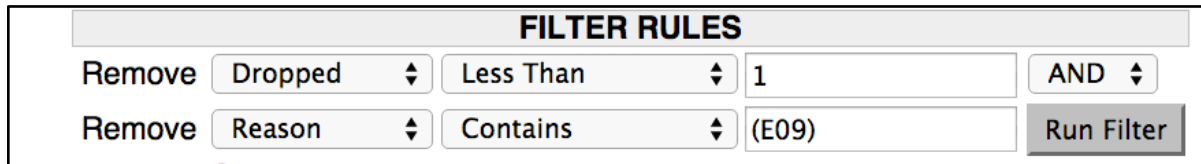
The report can be filtered further by **Enrollment codes** using the filter rules.

- Click **Add Rule**



Add Rule **Clear Rules**

- Enter **Reason > Contains > (ENROLLMENT CODE)** exactly as displayed in the report
- Click **Run Filter**



FILTER RULES

Remove Dropped Less Than 1 AND

Remove Reason Contains (E09) Run Filter

If viewing Withdrawal records, select Reason > Contains (Withdrawal Code) exactly as it displays in the report

ACTIVITY

Create an Add/Drop report for last month.

- Sort the report to display by grade level.
- Filter the report to show a specific enrollment code.
- Return the report to the original results.
- Filter the report to show only withdrawn students.