

Batch Selector

User Guide

Version 23.2

Search

Basic Search

Saved Searches:

NEW SEARCH

Add Search Criteria:

SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

SEARCH

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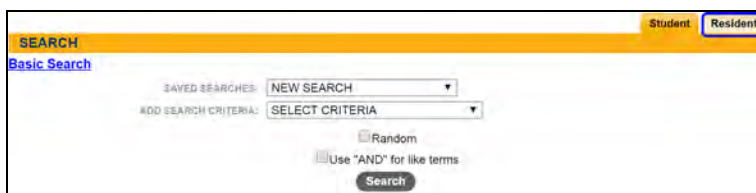
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Overview

SchoolTool uses a feature called "Batch Selector" throughout the application. The Batch Selector is an advanced search that uses criteria (name, address, grades, courses, etc.) to search for students or residents. The Batch Selector can often be reached by clicking on the Advanced Search link found in a number of locations.

There are two variations of the Batch Selector that are available throughout SchoolTool:

- Student Search: often represented as its own tab (as shown). This is the most common advanced search option and is used throughout the application to locate students.
- Resident Search: often represented as its own tab (as shown). This is used in fewer areas of SchoolTool to locate district resident. This does not typically include student records.



Each Batch Selector screen contains the same components. These are described in greater detail in this document.

- Saved Searches: Users have the ability to save searches, often called queries, and recall them any time a Batch Selector is displayed. Here, the user may select from the list of their previous saved searched.
- Add Search Criteria: Here, a user selects "terms" that are used to locate person records.
- Random: Checking this option will cause a random subset of students to be selected based on the selected search criteria.
- Use "AND" for like terms: This changes the default behavior of the Batch Selector when using the same search criteria (terms) multiple times.

Each term listed in the Batch Selector is controlled by its own specific security right. Users may see all or only some of the terms described in this document, depending on their user role and its associated permissions. For more information on the security rights for the Batch Selector, see the Maintenance User Guide.

Terms and Criteria

Terms are the values found in the **Add Search Criteria** drop-down list. They relate to pieces of data found in student and resident information records.

SAVED SEARCHES: NEW SEARCH

ADD SEARCH CRITERIA: SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

Search

For example, there is a term for **Last Name**, which retrieves records based on last names found in Census.

Terms may be used independently or may be combined to find specific groupings of students or residents. Terms may also be repeated multiple times to retrieve people of various criteria. Term combinations are also called “strings” or “queries”.

Things to know:

- Combinations of “like” terms create “or” statements. For example, use the Class Of term three (3) times to get students who will graduate in 14/15, 15/16, and 16/17.

SAVED SEARCHES: NEW SEARCH

ADD SEARCH CRITERIA: SELECT CRITERIA

CLASS OF

Grades class of: 2016-2017

CLASS OF

Grades class of: 2015-2016

CLASS OF

Grades class of: 2014-2015

☐ Random

☐ Use "AND" for like terms

Search

- Combinations of “unlike” terms create “and” statements. For example, use three (3) different terms to narrow a search and retrieve only students who are 12th-grade boys in Homeroom 106.

SAVED SEARCHES: NEW SEARCH

ADD SEARCH CRITERIA: SELECT CRITERIA

ENROLLMENT

☒ In District ☐ Out of District ☐ All

BUILDING: ALL

SCHOOL LEVEL: High School

GRADE: ALL

ALTERNATE ENROLLMENTS: ☒ Ignore ☐ Include ☐ Only

GENDER

Gender ☒ Male ☐ Female

HOMEROOM

Building Mindex HS

Homeroom 106

☐ Random

☐ Use "AND" for like terms

Search

- Selecting the “Use “AND” for like terms” check box will change the “or” statement to an “AND” statement.

For example, the Activity term is used twice to get students who are members of National Honor Society **or** play varsity baseball (see Example 1), but when the “**Use “AND” for like terms**” check box is selected we have changed the search so it will now return students who have are members of National Honor Society **AND** play varsity baseball.

ACTIVITY
 ✖ Activity: National Honor Society School Year: 2017-2018
 ACTIVITY
 ✖ Activity: Baseball, Varsity School Year: 2017-2018
☐ Random
☒ Use "AND" for like terms

- Random Groupings: The Batch Selector allows you to select a random population of the search result. To do this, click once in the **Random** check box (above the Search button) in addition to selecting your criteria.

Once the Random option is selected, you may choose to enter a number or a percentage of students to randomly locate.

SAVED SEARCHES: NEW SEARCH
 ADD SEARCH CRITERIA: SELECT CRITERIA
☒ Random ☒ Number ☐ Percentage 20
☐ Use "AND" for like terms
 Search

Performing an Advanced Search

1. Select your Add Search Criteria terms to build a search query.

SAVED SEARCHES: NEW SEARCH
 ADD SEARCH CRITERIA: SELECT CRITERIA
 ACTIVITY
 ✖ Activity: Boys Soccer - JV School Year: 2019-2020
 ACTIVITY
 ✖ Activity: Boys Soccer - Varsity School Year: 2019-2020
 ACTIVITY
 ✖ Activity: Girls Soccer - JV School Year: 2019-2020
 ACTIVITY
 ✖ Activity: Girls Soccer - Varsity School Year: 2019-2020
☐ Random
☐ Use "AND" for like terms
 Search

2. If desired, you may at this time select "Random" or "Use AND for like terms".
3. Click once on the Search button.
4. The screen will refresh displaying one of the following:
 - A list of search results with a total at the top and additional task buttons
 - A message stating “No Students Found” (or "No Residents found", if appropriate)
 - A student record, or the result of the target report, if only a single student matched the criteria

- A message stating "Too Many Results", indicating that too many records were returned by the search to display. This number is defined by the district in the Maintenance area.

Found 134 students						
Name	Student ID	Address	Phone	Age	Grade	Home Room
▶ Adams, Amy L	20822	4094 Jordan Road	H:(555) 425-7042	18		
▶ Adams, Angela E	1015	23 Ginnie Terrace	H:(555) 428-6967	18	12	Cafe
▶ Adams, Jennifer M	3036	9631 Bayou Cove Court	H:(555) 447-5295	18	12	Cafe
▶ Adams, Karen L	3082	3150 Albatross Drive	H:(555) 435-0237	18	12	146
▶ Adams, Michelle A	3083	8006 Molino Bridge Road	H:(555) 433-8039	18	12	187

Note: If you did not find the students you were looking for, use the Modify Search button to return to the Batch Selector and delete terms, add new terms, edit term values, etc., and then search again.

- The result list may have either Select buttons or checkboxes next to each option, depending on where the search was run from.
 - Select buttons will allow you to choose a single student from the results.
 - Check options will allow you to select multiple students from the results.

Name	☒ Name
▶ Adams, Amy L	☒ Adams, Amy L
▶ Adams, Angela E	☒ Adams, Angela E
▶ Adams, Jennifer M	☒ Adams, Jennifer M
▶ Adams, Karen L	☒ Adams, Karen L
▶ Adams, Michelle A	☒ Adams, Michelle A

- The results screen may also have a Continue button that will advance the search results to the next operation, if applicable.

Saved Searches

After you become familiar with the Batch Selector, you may want to save some search queries for use again later.

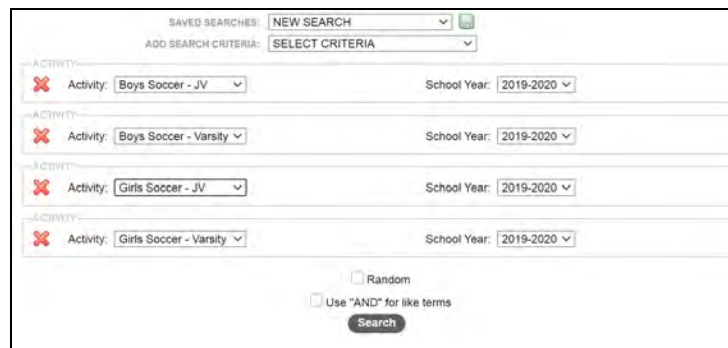
When you save a search (query), you are saving the term or combination of terms and their respective options. The next time you use the saved search, all of the pre-selected and pre-defined terms will automatically appear for reuse, saving you time.

Because SchoolTool is real time, search results may vary each time you run the saved query, based on current data. For example, a search of all 12th grade boys in Homeroom 106 could vary from marking period to marking period, or even day to day, as students change their homerooms or enrollments.

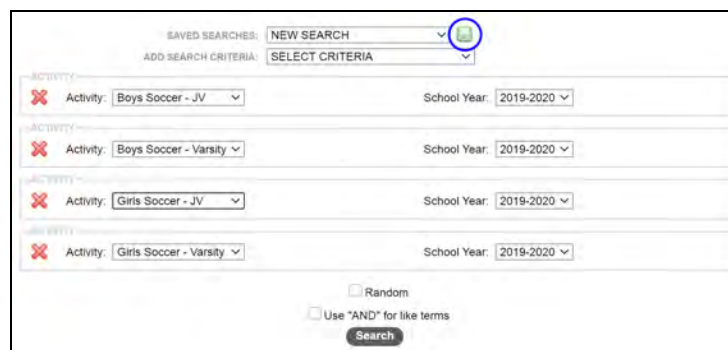
Saved Searches belong to the person who saved them. Only the user that created a saved search may refer to it.

Creating a Saved Search

1. From the Batch Selector screen, add terms to create a search that you wish to save.

A screenshot of the Batch Selector interface. At the top, there is a 'SAVED SEARCHES' dropdown menu with 'NEW SEARCH' selected, and an 'ADD SEARCH CRITERIA' dropdown menu with 'SELECT CRITERIA' selected. Below these are four rows of search criteria, each with a red 'X' icon on the left, an 'Activity' dropdown menu, and a 'School Year' dropdown menu. The activities are 'Boys Soccer - JV', 'Boys Soccer - Varsity', 'Girls Soccer - JV', and 'Girls Soccer - Varsity'. The school years are all set to '2019-2020'. At the bottom, there are two checkboxes: 'Random' and 'Use "AND" for like terms', both of which are unchecked. A 'Search' button is located at the bottom right.

2. Click once on the Save Current Search Criteria  button

A screenshot of the Batch Selector interface, identical to the one above, but with a blue circle highlighting the 'Save Current Search Criteria' button (a green square with a white document icon) located at the top right of the search criteria section.

3. The Search area will refresh with a field for the Criteria Name, and the actual criteria terms you are saving “grayed out” below.
4. Enter the Criteria Name (a.k.a. the Saved Search or query name).
5. This is how you will find the saved query later, so make sure the name is representative of what the results will be.

6. This field is a required, free-text field which can hold up to 50 alpha-numeric characters.
7. Save the query by clicking on the Save Current Search Criteria  button next to the name you just entered.
8. The Search area will refresh, returning you back to your Search Criteria. The name of your Saved Search will appear in the Saved Searches drop-down list.

Recalling a Saved Search

A saved search may be used throughout the application, whenever the batch Selector is on the screen. To recall and use a Saved Search, select the name of your saved search from the Saved Searches dropdown.

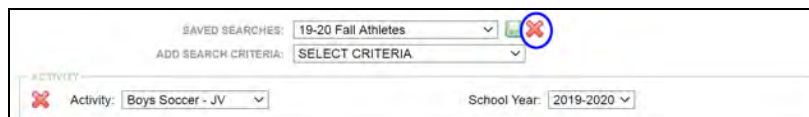
The Saved Search will appear on the screen as if you had manually reselected all of the same terms and options.



The screenshot shows a web interface for managing saved searches. At the top, there is a dropdown menu labeled "SAVED SEARCHES:" with the selected option "19-20 Soccer Teams". To the right of this dropdown are two small icons: a green checkmark and a red X. Below this is a section labeled "ADD SEARCH CRITERIA:" with a dropdown menu showing "SELECT CRITERIA". Underneath, there are four rows of search criteria, each starting with a red X icon and the word "ACTIVITY:". The first row has "Activity: Boys Soccer - JV" and "School Year: 2019-2020". The second row has "Activity: Boys Soccer - Varsity" and "School Year: 2019-2020". The third row has "Activity: Girls Soccer" and "School Year: 2019-2020". The fourth row has "Activity: Girls Soccer" and "School Year: 2019-2020". At the bottom of the form, there are two checkboxes: "Random" and "Use *AND* for like terms", both of which are unchecked. A "Search" button is located at the bottom center.

Deleting a Saved Search

You may delete a saved search at any time. To delete a search, simply select it from the list of saved searches and click the Delete button.



This screenshot is similar to the one above, but the "SAVED SEARCHES:" dropdown menu now shows "19-20 Fall Athletes". The red X icon next to the dropdown is circled in blue, indicating it is the delete button. The "ADD SEARCH CRITERIA:" dropdown still shows "SELECT CRITERIA". The search criteria section below shows one row with "Activity: Boys Soccer - JV" and "School Year: 2019-2020". The checkboxes and the "Search" button are also present at the bottom.

You will be asked to confirm the operation. After confirming, the saved search will be removed from the list.

Editing Saved Search Queries

To modify an existing Saved search, simply load the saved search, modify it as needed, and re-save the search as described in the previous section.

When saving, the name will remain in place, and will not need to be entered again.

You may also change the name to something new, so a different version of the search will be saved, without impacting the original.

Saved Result Sets

SchoolTool also allows you to save a group of students as a results set. A result set is composed of one or more students who typically do not share enough in common to easily locate using the Batch Selector. Instead, you can create a saved results set, linking the students to each other. You can then use this set in the Batch Selector.

For example, you might create a group of AIS students who are all from different grades or a French club composed of all upper classmen who take French as a foreign language, but who are at different levels.

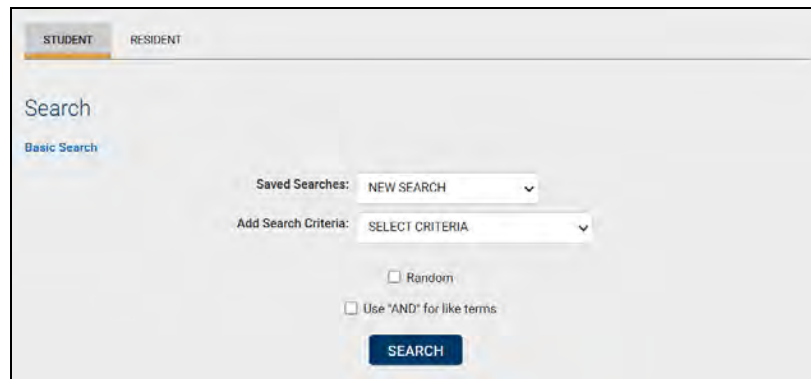
Saved Results Sets are different than saved searches in that Saved Results Sets save the actual list of student results, whereas a Saved Search saves the query that looks for students. A saved result set will never change; it contains the same students always, whereas a Saved Search will always look for all students that meet the criteria at the moment it is run.

Saved Result Sets are static, Saved searches are dynamic.

Though Saved Result Sets can be used throughout SchoolTool, they are always managed through the Preferences sub-module with the Home module. We represent this as "**Home > Preferences**" for the remainder of this document.

Student Batch Selector Terms

The following details the terms you may use to find a student or students using the Student tab. (Refer to the section on **Resident Batch Selector Terms** for details about Resident-specific terms, which are only available from the Census or Maintenance modules.)

The screenshot shows a web interface for the Student Batch Selector. At the top, there are two tabs: 'STUDENT' (which is selected and highlighted with an orange bar) and 'RESIDENT'. Below the tabs is a 'Search' section. On the left, there is a link for 'Basic Search'. In the center, there are two dropdown menus: 'Saved Searches:' with 'NEW SEARCH' selected, and 'Add Search Criteria:' with 'SELECT CRITERIA' selected. Below these are two checkboxes: 'Random' and 'Use "AND" for like terms', both of which are currently unchecked. At the bottom of the search section is a blue button labeled 'SEARCH'.

Activity

Retrieves students who are involved in an activity such as a club or sports team. Data is derived from a list of pre-defined activities that can be assigned in the **Counseling > Activities** sub-module.

Choose the **Activity** from the view drop down menu and select the appropriate **School Year** during which the Activity was active.

Example: Search for students on the Boys JV Soccer team in the 2019-2020 school year:

The screenshot shows a horizontal selection bar. On the left, there is a red 'X' icon followed by the text 'Activity: Boys Soccer - JV' and a dropdown arrow. To the right of this, there is a section for 'School Year: 2019-2020' with a dropdown arrow.

Address

Retrieves students based on a specified set of address criteria (including street address and other fields pertaining to addresses). This is useful for finding students on a particular bus route or for mailings. Data is derived from residence address of the student (which comes from residence of primary guardian).

1. To search, first specify the address type (ANY, Residence, Mailing, or Work), then specify the search type (Detailed Address, General Address, or No Address).

- A. Select the Detailed Address option (this is the default) to locate records by entering values in one or more specific fields in an address. All text fields on the screen accept wildcards.

The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address' (selected), 'General Address', and 'No Address'. Below this, there are several input fields for address details: 'Address:', 'Unit #:', 'County:', 'District:', 'Dwelling Type:', 'Phone Number:', 'Sequence Number:', 'Carrier Code:', 'Designatable:', and 'Is Listed:'. The 'County' dropdown is set to 'NY'.

- B. Use the General Address option to use the wildcard search (this represents previously existing functionality and allows users to search for any street address containing that value).

The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address', 'General Address' (selected), and 'No Address'. Below this, there is a single input field labeled 'Address Contains:'. The same address detail fields as in the previous screenshot are present, with 'County' set to 'NY'.

- C. Select the No Address option to locate any person with *no* address (emancipated students or those with no address record).

The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address', 'General Address', and 'No Address' (selected). The rest of the form is visible but not the focus.

Example 1: Search for all students who have a mailing zip code of 90210:

The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address', 'General Address', and 'No Address'. The 'Address Type' dropdown is set to 'Mailing'. Below this, there are several input fields for address details: 'Address:', 'Unit #:', 'County:', 'District:', 'Dwelling Type:', 'Phone Number:', 'Sequence Number:', 'Carrier Code:', 'Designatable:', and 'Is Listed:'. The 'County' dropdown is set to 'NY' and the 'Zip Code' field contains '90210'.

Example 2: Search for students with a residence address that contains the word “bay” anywhere in the address:

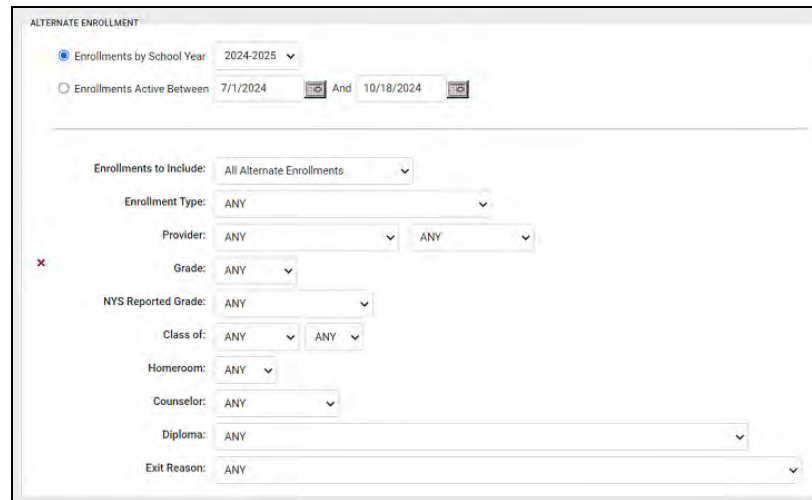
The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address', 'General Address' (selected), and 'No Address'. Below this, there is a single input field labeled 'Address Contains:' with the text 'bay' entered. The same address detail fields as in the previous screenshot are present, with 'County' set to 'NY'.

Example 3: Search for all students who do not have a residence address:

The screenshot shows the 'Address Type' section with three radio buttons: 'Detailed Address', 'General Address', and 'No Address' (selected). The rest of the form is visible but not the focus.

Alternate Enrollment

This term is used to locate students with alternate enrollment records. This can encompass all alternate enrollments or be narrowed down to show only current or only ended enrollments.

The screenshot shows a web-based search interface titled "ALTERNATE ENROLLMENT". At the top, there are two radio buttons: "Enrollments by School Year" (which is selected) and "Enrollments Active Between". The "Enrollments by School Year" option has a dropdown menu showing "2024-2025". The "Enrollments Active Between" option has two date input fields: "7/1/2024" and "10/18/2024", separated by an "And" label. Below these options is a section titled "Enrollments to Include:" with a dropdown menu set to "All Alternate Enrollments". To the left of this section is a red "X" icon. Below the "Enrollments to Include:" section are several dropdown menus for filtering criteria: "Enrollment Type:" (set to "ANY"), "Provider:" (set to "ANY"), "Grade:" (set to "ANY"), "NYS Reported Grade:" (set to "ANY"), "Class of:" (set to "ANY"), "Homeroom:" (set to "ANY"), "Counselor:" (set to "ANY"), "Diploma:" (set to "ANY"), and "Exit Reason:" (set to "ANY").

1. Select a radio button for the enrollment record timeframe:
 - **Enrollments by School Year:** Searches for currently active enrollments that meet the criteria below.
 - **Enrollments Active Between:** Searches for all enrollment records that were active during the specified date range. The end date in this range cannot be after the current date. This date range can span multiple school years.
2. Choose which enrollments to include in the search. The available options are as follows:
 - **All Alternate Enrollments:** All alternate enrollments will be included regardless of whether or not the record has an end date.
 - **Current Alternate Enrollments Only:** Only alternate enrollments designated as "Current" will be included. These are enrollments that do not have an end date.
 - **Ended Alternate Enrollments Only:** Only alternate enrollments that already have an end date entered will be included.
3. Specify the enrollment record criteria on which to search. Users may select "Any" for any of these drop-down fields, or may select specific values to narrow

the search using the following fields:

- A. Enrollment Type (This field will only show types that have been configured for in-district use.)
- B. Provider (This field will only show in-district providers.)
- C. Grade
- D. NYS Reported Grade
- E. Class of / Graduation Date (If a value other than “Any” is specified for the Class Of drop-down, the Graduation Date drop-down will be populated with all possible graduation dates for the selected Provider Building/School Level and Class Of selections; if “Any” is selected for Class Of, or if no value is selected for the Provider Building and/or School Level, the Graduation Date drop-down will allow you to select only “Any” or “None.”)
- F. Homeroom (This drop-down is only populated if a Building is selected in the Provider drop-down.)
- G. Counselor
- H. Diploma
- I. Exit Reason

Example 1: Search for students with current alternate enrollments in the 2024-2025 school year.

ALTERNATE ENROLLMENT

☒ Enrollments by School Year: 2024-2025

☐ Enrollments Active Between: 7/1/2024 And 10/18/2024

Enrollments to Include: Current Alternate Enrollments Only

Enrollment Type: ANY

Provider: ANY

Grade: ANY

NYS Reported Grade: ANY

Class of: ANY

Homeroom: ANY

Counselor: ANY

Diploma: ANY

Exit Reason: ANY

Example 2: Search for all students who were alternately enrolled in Mindex Senior High School 10th grade between 7/1/2023 and 10/18/2024.

At Risk

Retrieves students based on selected criteria for daily absences, late arrivals, referrals, and course ineligibility (fails) for a given time period.

1. Select School Year, Building, and School Level.
2. Select Dates (selected school year, marking period, or date range). The following rules are used to determine whether or not a student should be included in the results list for a given time period:
 - Fail counts are based on the last completed marking period in the selected time period.
 - Results only include students who had an active enrollment for that school year on the last day of the selected time period.
3. Specify criteria for the view by selecting a predefined value from the list or by entering criteria manually. Use the radio buttons to choose whether to use "AND" or "OR" logic to combine the Daily Absences, Late Arrivals, Referrals, and

Fails filters.

Note: If a filter is left blank, that filter will be ignored.

- A. # of Daily Absences (numeric): Specify the number of daily absences for a student in the selected date range. This can be filtered further by the following options:
- i. # of Daily Absences (numeric): Specify the number of daily absences for a student in the selected date range. This can be filtered further by the following options:
 - Count as Abs/In/Out (Any, Yes, No)
 - Excused (Any, Yes, No)
 - ii. # of Late Arrivals (numeric): Specify the number of late arrivals for a student in the selected date range. This can be filtered further by the following options:
 - Count as Abs/In/Out (Any, Yes, No)
 - Excused (Any, Yes, No)
 - iii. # of Referrals (numeric): Specify the number of discipline referrals for a student in the selected date range. This can be filtered further by the following options:
 - All Day Suspension (Any, Yes, No)
 - SSEC (Any, Yes, No) (Note that for school years 2016-2017 and earlier, this option will be labeled "VADIR" instead of SSEC to reflect historical data)
 - iv. # of Fails (numeric): Specify the number of courses in which the student was failing/ineligible. When searching based on a date range, this is determined based on the last ended marking period within the selected date range. (For example, if a user selected the current school year during Marking Period 4, results would include fails through Marking Period 3 only, because Marking Period 4 grades have not yet been submitted.)

Example 1: Locate all students who have meet the "HS Tier 1" predefined criteria set (3 or more unexcused daily absences *and* 3 or more discipline referrals) in Marking Period 2.

SCHOOL YEAR: 2017-2018
 BUILDING: Mindex HS
 SCHOOL LEVEL: High School
 DATES: ☐ Selected School Year ☒ Marking Period MP2 ☐ Date Range From 12/1/2017 To 6/30/2018
 USE PREDEFINED VALUES: HS Tier 1
☒ Use AND ☐ Use OR
 # of Daily Absences Greater than or equal to 3 Count as Abs/In/Out Any Excused No
 # of Late Arrivals Greater than or equal to 3 Count as Abs/In/Out Any Excused Any
 # of Referrals Greater than or equal to 3 All Day Suspension Any SSEC Any
 # of Fails Greater than or equal to 3

Example 2: Locate all students who have at least 4 late arrivals or 4 or more SSEC referrals for the selected school year.

SCHOOL YEAR: 2017-2018
 BUILDING: Mindex HS
 SCHOOL LEVEL: High School
 DATES: ☐ Selected School Year ☒ Marking Period MP2 ☐ Date Range From 12/1/2017 To 6/30/2018
 USE PREDEFINED VALUES: NEW SEARCH
☐ Use AND ☒ Use OR
 # of Daily Absences Greater than or equal to 3 Count as Abs/In/Out Any Excused Any
 # of Late Arrivals Greater than or equal to 4 Count as Abs/In/Out Any Excused Any
 # of Referrals Greater than or equal to 4 All Day Suspension Any SSEC Yes
 # of Fails Greater than or equal to 3

Attendance

Data is derived from a student's attendance records.

ATTENDANCE
☒ Absences ☐ Late Arrivals ☐ Early Dismissals ☐ All
 Greater Than
 From 7/1/2019 To 6/30/2020

1. Select the absence type by choosing the appropriate radio button:
 - **Absences**
 - **Late Arrivals**
 - **Early Dismissals**
2. Select the specific absence/late arrival/early dismissal value from the drop-down list. The drop-down list allows you to select a single reason to see all absences/late arrivals/early dismissals by type. *All* is the default.

3. Select Greater Than, Less Than, Exactly, or Between, and type in a value or range of values (when using the “Between” option to search based on a range of values, both values are inclusive; if a user selects “Between 2 and 5” the results will include students with record counts of 2 as well as 5).
4. Check the “Consecutive Days” option to include only students who have the appropriate number of absences on consecutive days (this refers only to days where school is in session; absences on a Friday and Monday are considered to be consecutive absences).

Note: The “Consecutive Days” checkbox is not available when the user selects “Less Than” from the drop-down menu.

5. Select **From** and **To** dates to make a valid date range for the attendance records.

Example: Search for students with 3 or more unexcused absences in a row during the month of September:

BEDS Provider

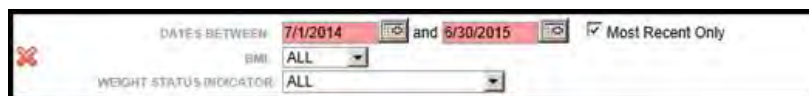
This term allow users to locate students who have a BEDS Provider listed on their current Official Enrollment records. This term should be used in conjunction with the existing District term.

Only BEDS Providers that are marked as “Active” in Maintenance will appear in this drop-down menu. The list of providers will be organized alphabetically by provider name and will include the corresponding BEDS code in parentheses.

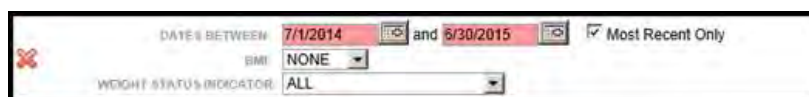
1. To locate students enrolled at a specific BEDS provider, add the BEDS Provider batch selector term. Select the appropriate provider from the drop-down menu.
2. Add the District search term. Select “ANY” from the Lives in District dropdown menu, and select the “Ignore Enrollment” radio button.

Body Mass Index

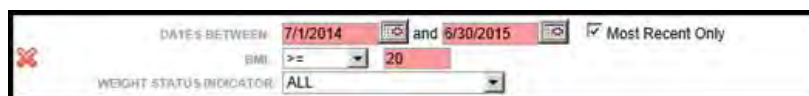
This term allows users to locate students based on BMI and or Weight Status Indicator data entered in students' physicals (located on the student record on the **Medical > History** tab). This term uses a date range to search only physicals between the specified dates. Users can specify whether or not the search should include any physicals in that range, or only the most recent for each student. Searches will include all students, regardless of whether or not the student has physicals entered.



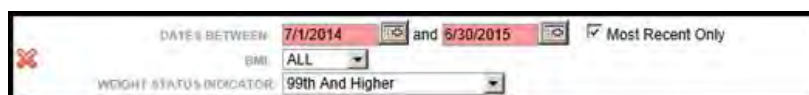
Example 1: Find all students who do not have a BMI recorded as of the 2014-2015 school year.



Example 2: Find all students with a BMI above 20 in physicals that have dates within the 2014-2015 school year.



Example 3: Find all students who have ever had a weight status indicator in the "99th And Higher" percentile during the 2014-2015 school year.



Class Of

Retrieves students with a designated year of graduation, regardless of enrollment status. Data is derived from "Class Of" field on the student's enrollment program service record.

1. To find only those students who are currently enrolled, combine this term with the Enrollment term.
2. Choose the **Class Of** value from the drop-down list.
3. When the term appears it will say "Graduates Class of:"



Example: Search for students who will graduate during the 2021-2022 school year:



Batch Selector
Graduates class of: 2021-2022 ▼

Note: If you search this term alone, you will locate every student who has the selected Class Of year on his/her enrollment, regardless of their enrollment status.

Cohort Term

Retrieves students based on their designated cohort, or year that they entered the ninth (9th) grade. Data is derived from the **Census > Demographics** tab of the student record.

- Choose the Cohort year (year entered ninth (9th) grade) from the drop-down list.



Batch Selector
Cohort Year: 2019-2020 ▼

Example: Search for students who entered ninth grade during the 2002-2003 school year:

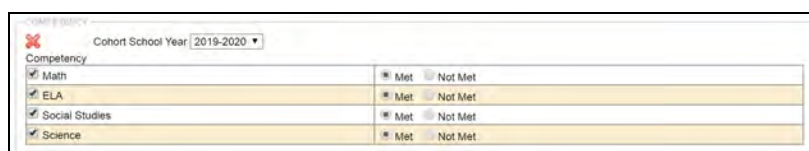


Batch Selector
Cohort Year: 2002-2003 ▼

Note: All student enrollments require a cohort year, even if they haven't started 9th grade yet. Make sure that each K-8 grade student has an appropriate projected cohort date at the time of enrollment; otherwise these students may appear in cohort reports where they don't belong.

Competency

Use this information to find students who have or have not met a defined graduation competency or competencies. Data is derived from records created by the district in the **Counseling > Competency** sub-module. Each competency is set up and made active according to Cohort year.



Batch Selector
Cohort School Year: 2019-2020 ▼

Competency	Met	Not Met
☒ Math	☐ Met	☐ Not Met
☒ ELA	☐ Met	☐ Not Met
☒ Social Studies	☐ Met	☐ Not Met
☒ Science	☐ Met	☐ Not Met

1. Select the **Cohort School Year** from the drop-down list.
2. Click once in the check box to the left of each competency name (i.e. Math, English, etc.) you wish to select. Selecting multiple to search for students who have (met or not met) all of the selected competencies.
3. Select the appropriate radio button: **Met** or **Not Met** for each selected competency.

Example: Search for students who *have not* met the Math competency but *have* met the Science competency for the selected Cohort School Year 2019-2020:

Note: For more information on competencies, refer to the Counseling User Guide.

Contacts

Use this information to find students by the types of contact relationships they have. For example, you might wish to find all students with emergency contacts or those who are independent (emancipated). Data is derived from student's Contact tab.

Note: If you wish to retrieve students who are not yet enrolled, you must combine the Contacts term with the District term.

1. Select the **Contact** relationship type from the drop-down list.
2. Click once in the **Contact lives in district** check box if the contact lives in the district. If you select the check box, additional options appear:
 - A. **Currently** – indicates the contact's current residence address is within the district.
 - B. **At time of care** – indicates the contact had an address in the district at some point during his/her defined relationship with the student.

This image shows the term as it appears when first selected.

This image shows the term when the Contact lives in district check box has been selected.

The image below shows a sample list of contact relationships to choose from. Contact relationships are defined by the district in the Maintenance module.

CONTACTS

Contact

NONE

☒

Contact

☐

Contact

NONE

Mother

Father

Step Mother

Step Father

Foster Father

Foster Mother

Legal Guardian

Grandmother

Grandfather

Example: Search for students who have an Aunt listed as a guardian:

 Contact 
☐ Contact lives in district

Counselor Term

Retrieves students who are assigned to the selected counselor.

Data is derived from two places:

- The Counselor field on the student enrollment program service record contains the name of the counselor this student is assigned to;
- The list of counselors who appear in the drop-down field come from those faculty who are designated as “counselor” faculty types in their individual faculty records.

Choose the Counselor name from the **Faculty Name** drop-down list.

If you select *NONE*, students who do not have any counselor designated on their enrollment record will be retrieved.

✖ Faculty Name

Example: Search for students who have Sallie Smith listed as their counselor:

Faculty Name

Custody Alert

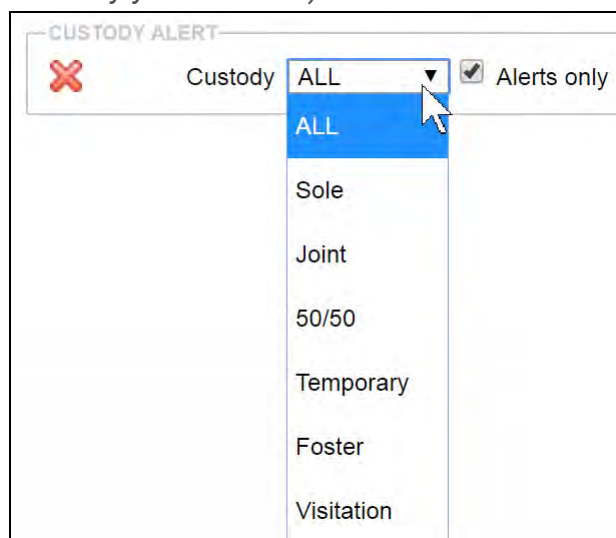
Use this term to locate students who have a custody situation. This may or may not be flagged by an alert. Data is derived from the student Contact tab.



CUSTODY ALERT

☐ Custody ALL ☒ Alerts only

1. Select the **Custody** type from the drop-down list. (The list will display all custody values defined by your district.)



CUSTODY ALERT

☐ Custody ALL ☒ Alerts only

- ALL
- Sole
- Joint
- 50/50
- Temporary
- Foster
- Visitation

2. Check or un-check the “Alerts Only” option as needed. If checked, the search will return only those custody types that are tied to an alert. If unchecked, the search will return *all* custody types.

Example: Search for students who have a Visitation custody alert per their Contacts tab:



CUSTODY ALERT

☐ Custody Visitation ☒ Alerts only

Custom Alerts

Use this term to find students who have (or do not have) a custom alert. You may specify whether to search for any students who have a custom alert, or only those who have a specific custom alert or flag color. You may also use the “Does Not Have” radio button to find only students who do not have an alert (again searching across all alerts or only a specific alert or flag).



CUSTOM ALERTS

☒ Does Not Have

☐ Alert Any

☐ Flag Any

Example: Search for students who have the “No Internet Access” alert

Does Not Have
Alert: No internet access
Flag: Any

Date of Birth

Use this term to find those students born between a certain date range. Districts may use this to find student populations which are approaching school age in order to distribute census mailers. Data is derived from the upper portion of the student information record.

1. Enter the **Date of Birth From** and **To** dates to create a range of birthdays. Use the pop-up calendars to select the dates or manually enter them in the **mm/d-d/yyyy** format.

DATE OF BIRTH: From 7/9/2020 To 7/9/2020

Example: Search for students born between 7/1/2012 and 12/31/2012:

DATE OF BIRTH: From 7/1/2012 To 12/31/2012

Note: If you are trying to find students with birthdays during a particular month but over a span of years, you will need to combine multiple Date of Birth terms.

Example 2: Search for students born during the month of September in years between 2015-2017:

DATE OF BIRTH: From 9/1/2015 To 9/30/2015

DATE OF BIRTH: From 9/1/2016 To 9/30/2016

DATE OF BIRTH: From 9/1/2017 To 9/30/2017

Note: If you wish to generate a Birthday list for daily announcements use the Census Birthday Report. Refer to the Census User Guide for more information.

Demographics

The Demographics batch term allows users to locate individuals based on information listed in any given field on the **Census > Demographics** tab of a person record.

To use this term, select a field from the drop-down list. This list contains a value for each individual field shown on the Demographics tab. Select a field and specify the search criteria for that field (depending on the field selected, the user may be provided with radio buttons, free-text fields, drop-downs, or date range fields).



Note: Because the batch selector already contains separate batch terms for Cohort and Ethnicity and Race, these two options are not available from the Demographics term.

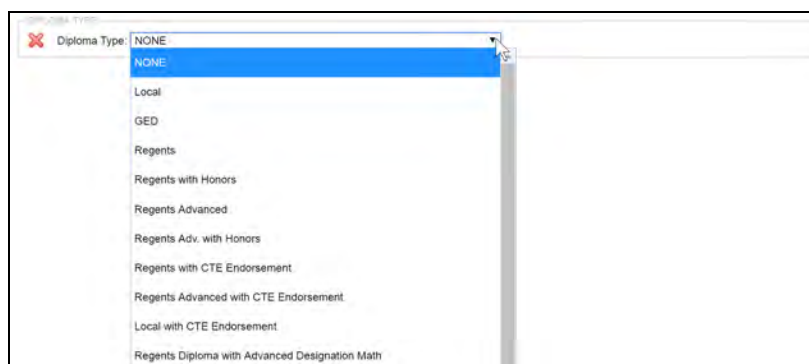
Diploma Type

Use this term to locate students who are assigned a specific diploma type in **Census > Student > Official Enrollment**.

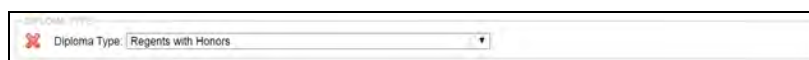


The drop-down menu lists all diploma types as defined in **Maintenance > Census > Diploma Type**. It also includes an option for "NONE," which is the default value. Selecting "NONE" will return all students who do not have a diploma type assigned in their Official Enrollment.

Note: This term locates only those students who have an official enrollment for the current school year.



Example: Search for students who is assigned a "Regents with Honors" diploma type:



Discipline

Use this term to retrieve students who have received a referral record for an offense or an incident report. Data is derived from the student's discipline referral record(s). Users may search by Offender or Victim (or both), based on number of incidents, date range, or offense- and/or disposition-specific criteria.

The screenshot shows a search form titled "DISCIPLINE". It contains the following fields and options:

- PERSON TYPE:** A dropdown menu set to "Offender".
- NUMBER OF INCIDENTS:** A dropdown menu set to "More than" with a numeric input field containing "0".
- DATES:** Two date pickers showing "7/1/2019" and "8/30/2020". To the right are radio buttons for "Incident" (selected), "Assigned", and "Served".
- OFFENSE:** A dropdown menu set to "ANY". Below it are radio buttons for "SSEC Offenses Only", "VADIR Offenses Only", and "DASA Offenses Only". A "Bias Category" dropdown is also present.
- DISPOSITION:** A dropdown menu set to "ANY". Below it are radio buttons for "Disposition Category" and a list of specific dispositions: "Is Counseling or Treatment", "Is Teacher Removal", "Is Detention", "Is ISS", "Is OSS", "Is Involuntary Transfer to an Alternate Placement", "Is Law Enforcement", "Is Juvenile Justice or Criminal Justice System", "Is Community Service", and "Is Law Enforcement or Juvenile Justice".

1. **Person Type:** Select whether to return students who are assigned as an Offender, a Victim, either an Offender *or* a Victim, or both an Offender *and* a Victim on a given referral.
2. **Number of Incidents (required):** Select More than, Fewer than, Exactly, or Between from the drop-down and then specify a numeric value for the number of incidents. By default this field is set to "More than 0" to return all incident records that meet the other criteria.
3. **Date Range ("From...To..." date fields, required):** The values of the From and To fields default to the beginning and end dates, respectively, of the current school year. Users may search for incidents that occurred within a specified date range.
 - A. Radio buttons allow the user to specify whether these dates should reflect the incident date, the assigned date, or the served date (assigned and served will only return records that have a disposition with a corresponding assigned or served date).
4. **Offense Options:** Users may search for any offenses, a specific offense, or only those designated as SSEC, VADIR, or DASA. Select a radio button to choose from the following:
 - A. Offense dropdown: Users may select "Any" or choose a value from the Offense drop-down to further narrow the search.
 - B. SSEC Offenses Only: Users may select this radio button to search for only those offenses that are designated as SSEC offenses in **Main-tenance > Discipline > Discipline Type**. Note that only offenses that occurred after 7/1/2017 may be designated as SSEC offenses.

- When this option is selected, users can also select a specific Bias Category to search for (bias categories are associated with a sub-set of SSEC offenses)
- VADIR Offenses Only: Users may select this radio button to search for only those offenses that are designated as VADIR offenses in **Maintenance > Discipline > Discipline Type**. Note that only offenses that occurred before 7/1/2017 may be designated as VADIR offenses.
 - DASA Offenses Only: Users may select this radio button to search for only those offenses that are designated as DASA offenses in **Maintenance > Discipline > Discipline Type**. Note that only offenses that occurred before 7/1/2017 may be designated as DASA offenses.
- Disposition Options:** Users may search for any dispositions, a specific disposition, or specific categories of dispositions. Select a radio button to choose from the following:
 - Disposition drop-down: Users may select “Any” or choose a value from the Disposition drop-down to further narrow the search.
 - Disposition Category: Users may select the Disposition Category radio button to search based on a category rather than a specific disposition. The checkboxes available for discipline categories include the following: Is Counseling or Treatment, Is Teacher Removal, Is Detention, Is ISS, Is OSS, Is Involuntary Transfer to Alternate Placement, Is Law Enforcement (post 7/1/2017 only), Is Juvenile or Criminal Justice System (post 7/1/2017 only, and Is Law Enforcement or Juvenile Justice (pre 7/1/2017 only. These categories reflect the various Disposition Types as defined in **Maintenance > Discipline > Disposition**.

Example 1: Search for all offenders who had more than 2 referrals in the month of October:

The screenshot shows the 'DISCIPLINE' search interface with the following settings:

- PERSON TYPE:** Offender
- NUMBER OF INCIDENTS:** More than 2
- DATES:** 10/1/2017 to 10/31/2017
- OFFENSE:** ANY (selected)
- DISPOSITION:** ANY (selected)
- Disposition Category:** (unchecked)
- Incident Type:** Incident (checked), Assigned (unchecked), Served (unchecked)
- Offense Type:** SSEC Offenses Only (unchecked), VADIR Offenses Only (unchecked), DASA Offenses Only (unchecked)
- Bias Category:** ANY
- Disposition Categories (all unchecked):**
 - Is Counseling or Treatment
 - Is Teacher Removal
 - Is Detention
 - Is ISS
 - Is OSS
 - Is Involuntary Transfer to an Alternate Placement
 - Is Law Enforcement
 - Is Juvenile Justice or Criminal Justice System
 - Is Community Service
 - Is Law Enforcement or Juvenile Justice

Example 2: Search for all students who were victims of theft during the 2018-2019 school year:

DISCIPLINE

PERSON TYPE:

NUMBER OF INCIDENTS:

DATES: to ☒ Incident ☐ Assigned ☐ Served

OFFENSE:

☐ SSEC Offenses Only ☐ Bias Category

☐ VADIR Offenses Only

☐ DASA Offenses Only

DISPOSITION:

☐ Disposition Category

☐ Is Counseling or Treatment ☐ Is Involuntary Transfer to an Alternate Placement

☐ Is Teacher Removal ☐ Is Law Enforcement

☐ Is Detention ☐ Is Juvenile Justice or Criminal Justice System

☐ Is ISS ☐ Is Community Service

☐ Is OSS ☐ Is Law Enforcement or Juvenile Justice

Example 3: Search for all students who had more than 5 suspensions (either ISS or OSS) assigned during the school year:

DISCIPLINE

PERSON TYPE:

NUMBER OF INCIDENTS:

DATES: to ☒ Incident ☐ Assigned ☐ Served

OFFENSE:

☐ SSEC Offenses Only ☐ Bias Category

☐ VADIR Offenses Only

☐ DASA Offenses Only

DISPOSITION:

☐ Disposition Category

☐ Is Counseling or Treatment ☐ Is Involuntary Transfer to an Alternate Placement

☐ Is Teacher Removal ☐ Is Law Enforcement

☐ Is Detention ☐ Is Juvenile Justice or Criminal Justice System

☒ Is ISS ☐ Is Community Service

☒ Is OSS ☐ Is Law Enforcement or Juvenile Justice

Example 4: Search for all students who had referrals for SSEC offenses and were given detention for the disposition during the current school year:

DISCIPLINE

PERSON TYPE:

NUMBER OF INCIDENTS:

DATES: to ☒ Incident ☐ Assigned ☐ Served

OFFENSE:

☒ SSEC Offenses Only ☐ Bias Category

☐ VADIR Offenses Only

☐ DASA Offenses Only

DISPOSITION:

☐ Disposition Category

☐ Is Counseling or Treatment ☐ Is Involuntary Transfer to an Alternate Placement

☐ Is Teacher Removal ☐ Is Law Enforcement

☐ Is Detention ☐ Is Juvenile Justice or Criminal Justice System

☐ Is ISS ☐ Is Community Service

☐ Is OSS ☐ Is Law Enforcement or Juvenile Justice

Example 5: Search for all students who were involved in one or more incidents during the month of September that have not yet been given a disposition:

DISCIPLINE

PERSON TYPE:

NUMBER OF INCIDENTS:

DATES: to ☐ Incident ☐ Assigned ☐ Served

OFFENSE:

☐ SSEC Offenses Only

☐ VADIR Offenses Only

☐ DASA Offenses Only

DISPOSITION:

☐ Disposition Category

☐ Is Counseling or Treatment ☐ Is Involuntary Transfer to an Alternate Placement

☐ Is Teacher Removal ☐ Is Law Enforcement

☐ Is Detention ☐ Is Juvenile Justice or Criminal Justice System

☐ Is ISS ☐ Is Community Service

☐ Is OSS ☐ Is Law Enforcement or Juvenile Justice

Example 6: Search for all students who are listed as both an offender and a victim on the same referral during the school year:

DISCIPLINE

PERSON TYPE:

NUMBER OF INCIDENTS:

DATES: to ☐ Incident ☐ Assigned ☐ Served

OFFENSE:

☐ SSEC Offenses Only

☐ VADIR Offenses Only

☐ DASA Offenses Only

DISPOSITION:

☐ Disposition Category

☐ Is Counseling or Treatment ☐ Is Involuntary Transfer to an Alternate Placement

☐ Is Teacher Removal ☐ Is Law Enforcement

☐ Is Detention ☐ Is Juvenile Justice or Criminal Justice System

☐ Is ISS ☐ Is Community Service

☐ Is OSS ☐ Is Law Enforcement or Juvenile Justice

District

Retrieves students who live in or outside the district that are currently enrolled, were previously enrolled, were never enrolled, or residents who simply live within district boundaries.

This term is meant to be used in combination with other terms, such as enrollment, class of, etc; it does not function as a standalone term. Data is derived from the district information linked to the residence address of the student.

DISTRICT

Lives in District:

☐ Ignore enrollment

☐ Previously enrolled in OTHER

☐ Never enrolled in OTHER

☐ Not currently enrolled in OTHER

1. The **Lives in District** drop-down list will default to the district's default information. Select an alternate district from the list if appropriate.
2. Select the appropriate radio button:

- Ignore enrollment – pulls up all those students who simply live in the selected district, regardless of enrollment status.
- Previously enrolled in [district name] – retrieves those who live in the selected district and were enrolled in district schools in the past (such as a student who graduated or one who attended and then transferred.)
- Never enrolled in [district name] – retrieves those who live in the selected district and who have never been enrolled in a district school.
- Not currently enrolled in [district name] – retrieves those who live in the selected district and who are not currently enrolled in a district school (such as students who are pre-enrolled or those attending non-district providers.)

Note: If a student's Primary Guardian's address is not attached to a district, the student will not be found when this term is used.

Example: Search for all students who live in our district and who are projected to enroll in one of our schools in the fall:

The screenshot shows a search interface with two main sections. The first section, 'DISTRICT', has a dropdown menu set to 'MINDEX CSD'. Below it are four radio button options: 'Ignore enrollment' (selected), 'Previously enrolled in MINDEX CSD', 'Never enrolled in MINDEX CSD', and 'Not currently enrolled in MINDEX CSD'. The second section, 'PROJECTED ENROLLMENT', has two radio button options: 'In District' (selected) and 'Out Of District'. Below these are dropdown menus for 'Building' (set to 'ALL'), 'School Level' (set to 'ALL'), 'Grade' (set to 'ALL'), and 'School Year' (set to '2020-2021'). At the bottom, there are date pickers for 'Projected to enroll from' (set to '7/1/2020') and 'to' (set to '8/30/2021').

Email

The Email batch term allow users to locate students based on their email addresses as entered on the student record from the Census module. The Resident tab will also allow for parent searches. Searches will return any students or parents whose email includes the specified text.

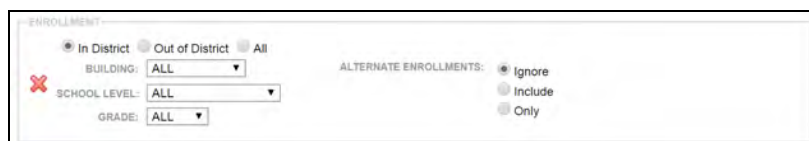
The screenshot shows a search input field with a red 'X' icon on the left and the label 'Email' followed by a text input box.

Example 1: Find all users who have an email that contains "@mindex.com".

The screenshot shows the same search input field as before, but with the text '@mindex.com' entered into the text input box.

Enrollment (Grade)

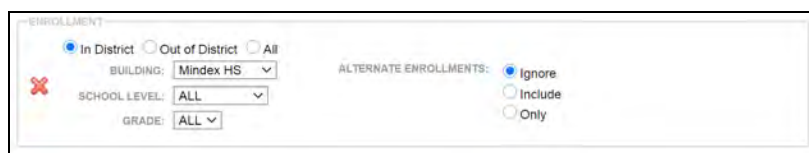
Retrieves the building, school level and grade where the student is enrolled, and allows user to restrict the search by those students in the district and those outside the district. This term is meant to be used in combination with other terms, such as program services, class of, etc. Data is derived from the student's enrollment program service record.



1. Select the appropriate radio button:
 - In District – students who are enrolled in district-based providers.
 - Out of District – locates students who live in other districts but are enrolled in-district or students who are enrolled in non-district-based providers; if this option is selected, new fields appear where the alternate District, and whether it is Public or Private, can be designated.

Note: When using the "Out of District" option to locate students enrolled in *other* districts, you must also add the Is Placed batch term in order to obtain results.
2. Select options from the drop-down lists to narrow the search.
 - Building
 - School Level
 - Grade
3. Choose whether or not to include alternate enrollments (only available when In District is selected and no Grade is specified).
 - Ignore – returns only those students who have official enrollments in the selected building/school level
 - Include – returns students with official or alternate enrollments in the selected building/school level
 - Only – returns only students with alternate enrollments in the selected building/school level

Example 1: Search for all students who are enrolled in the High School:



Example 2: Search for all 8th grade students who live outside of the district but attend our district schools.

The screenshot shows the 'ENROLLMENT' search form. The 'In District' radio button is unselected, while 'Out of District' is selected. The 'DISTRICT' dropdown is set to 'OTHER'. The 'GRADE' dropdown is set to 'All'. The 'Public' checkbox is checked, and 'Private' is unchecked. A red 'X' icon is visible on the left side of the form.

Example 3: Search for any student with an enrollment (either official or alternate enrollments) in the High School.

The screenshot shows the 'ENROLLMENT' search form. The 'In District' radio button is selected. The 'BUILDING' dropdown is set to 'Mindex HS'. The 'SCHOOL LEVEL' dropdown is set to 'ALL'. The 'GRADE' dropdown is set to 'ALL'. Under 'ALTERNATE ENROLLMENTS', the 'Include' radio button is selected. A red 'X' icon is visible on the left side of the form.

Example 4: Search for students from any building who have an alternate enrollment in the Middle School.

The screenshot shows the 'ENROLLMENT' search form. The 'In District' radio button is selected. The 'BUILDING' dropdown is set to 'Mindex MS'. The 'SCHOOL LEVEL' dropdown is set to 'ALL'. The 'GRADE' dropdown is set to 'ALL'. Under 'ALTERNATE ENROLLMENTS', the 'Only' radio button is selected. A red 'X' icon is visible on the left side of the form.

Enrollment History

This term is used to locate students based on information in either a current or past enrollment record.

The screenshot shows the 'ENROLLMENT HISTORY' search form. It has four radio buttons for the timeframe: 'Current Enrollment Records' (selected), 'Enrollments by School Year' (set to '2019-2020'), 'Enrollments by Date Range' (set to '7/1/2019' and '4/30/2020'), and 'Previously Enrolled'. Below these, there are several dropdown menus for filters: 'ENROLLMENT' (set to 'ANY'), 'PROVIDER' (set to 'ANY'), 'IS PLACED' (set to 'ANY'), 'GRADE' (set to 'ANY'), 'NYS REPORTED GRADE' (set to 'ANY'), 'CLASS OF' (set to 'ANY'), 'HOMEROOM' (set to 'ANY'), 'COUNSELOR' (set to 'ANY'), 'DIPLOMA' (set to 'ANY'), and 'EXIT REASON' (set to 'ANY'). A red 'X' icon is visible on the left side of the form.

1. Select a radio button for the enrollment record timeframe:
 - A. Current Enrollment Records: Searches for currently active enrollments that meet the criteria below.
 - B. Enrollment Records During: Searches for all enrollment records that were active during the selected school year.

- C. Enrollment Records Between: Searches for all enrollment records that were active during the specified date range. The end date in this range cannot be after the current date.
- D. Previously Enrolled: Searches for all students who are no longer enrolled that meet the criteria below.

Note: This batch term will only return students who currently have active enrollments, except when the search is performed from within the Census, Counseling, or Scheduling modules, where all students meeting the criteria will be returned regardless of their current enrollment status. If using the “Previously Enrolled” option, no students will be returned unless the search is performed from within Census, Counseling, or Scheduling.

2. Specify the enrollment record criteria on which to search. Users may select “Any” for any of these drop-down fields, or may select specific values to narrow the search using the following fields:
 - A. Enrollment
 - B. Provider (If searching only for In District enrollments, select a Building and School Level as appropriate. If Building and School Level are selected, the Homeroom drop-down will be populated with the appropriate Homerooms for that Building/School Level.)
 - C. Is Placed
 - D. Grade
 - E. NYS Reported Grade
 - F. Class of / Graduation Date (If a value other than “Any” is specified for the Class Of drop-down, the Graduation Date drop-down will be populated with all possible graduation dates for the selected Provider Building/School Level and Class Of selections; if “Any” is selected for Class Of, or if no value is selected for the Provider Building and/or School Level, the Graduation Date drop-down will allow you to select only “Any” or “None.”)
 - G. Homeroom (This drop-down is only populated if a Building is selected in the Provider drop-down.)
 - H. Counselor
 - I. Diploma
 - J. Exit Reason

Example 1: Search for all students who graduated in the class of 2018.

Example 2: Search for all students who were in 10th grade and were assigned to Homeroom 104 during the 2018-2019 school year.

Enrollment Type

Retrieves students with specific pre-defined enrollment types. Data is derived from the student's enrollment program service record.

1. Select the appropriate enrollment type from the drop-down list.
2. Define the school year and date ranges when the students were enrolled with this type of enrollment. The default is the current school year.

Example: Search for all students who have a Foreign Exchange Enrollment record:

Ethnicity and Race

Retrieves students based on pre-defined race types. Data is derived from the student's Demographics tab information in the Census module.



The screenshot shows the 'ETHNICITY AND RACE' search form. It includes a red 'X' icon, a dropdown for 'Is Hispanic' set to 'Either', a dropdown for 'Race' set to 'ANY', a 'Show Inactive Values' checkbox, and two unchecked checkboxes: 'Check All Race Fields' and 'Only Return Students with Multiple Races'.

1. Select the appropriate race from the drop-down list. To search for this value among all ethnicity/race fields, check the option to “Check All Race Fields.” Otherwise, the search will only locate records matching this value in the first ethnicity/race field.
2. Select a value from the “Is Hispanic” drop-down to specify whether the search should include all students, only those who are designated as Hispanic, or only those who are not designated as Hispanic.
3. Use the “Include Inactive” checkbox to include races designated as “Inactive” in the search results.
4. Use the “Only Return Students with Multiple Races” option to locate only students who have multiple races.

Example 1: To find any student whose primary race is Asian, select Asian from the Race drop-down and do not check other options.



The screenshot shows the 'ETHNICITY AND RACE' search form. The 'Race' dropdown is now set to 'Asian'. The 'Check All Race Fields' and 'Only Return Students with Multiple Races' checkboxes remain unchecked.

Example 2: To find any student with a race of Asian, regardless of whether or not it is the primary race, select Asian from the Race drop-down and check the “Check All Race Fields” option.



The screenshot shows the 'ETHNICITY AND RACE' search form. The 'Race' dropdown is set to 'Asian'. The 'Check All Race Fields' checkbox is now checked, while 'Only Return Students with Multiple Races' remains unchecked.

Example 3: To find any student with a primary race of Asian who also has additional races entered, select Asian from the drop-down and check the “Only Return Students with Multiple Races” option.



The screenshot shows the 'ETHNICITY AND RACE' search form. The 'Race' dropdown is set to 'Asian'. The 'Only Return Students with Multiple Races' checkbox is now checked, while 'Check All Race Fields' remains unchecked.

Example 4: To find any student with multiple ethnicities entered, regardless of primary ethnicity, select “ANY” from the Race drop-down and check the “Only Return Students with Multiple Races” option.



Example 5: To find any student designated as Hispanic, regardless of race, choose "Yes" in the Is Hispanic drop-down and select "Any" from the Race drop-down.



From File

The "From File" is a special term that will allow a user to use external text files to find all students that match ID numbers stored in the file.



To use the “From File” term:

1. While using the batch selector, select **From File** from the Add Search Criteria dropdown
2. Use the Browse button to locate the appropriate text or CSV file from a local or network drive
3. Click on Search
 - A. A message will appear beneath the original term that displays the number of *possible* student ID matches.



- B. Below the results message, the search will return a list of all *enrolled* students that have an ID number in the file.

Note: File formats that can be used for this Batch Selector term:

- Must be standard text files (files that are readable by MS Note-pad)
- Must be either comma delimited or a single column of ID numbers
- Can have any file extension, or none at all

Gender

Retrieves students of a particular gender. Only use this if you are trying to select a student population of one gender; otherwise, search results include all genders by default. Data is derived from the upper portion of the student information record. This term can be used alone but is meant to be used in combination with other terms. For example, you can find all non-binary students in the building, all males who had discipline referrals for during a specified month, or all female students with gym padlocks assigned.

A screenshot of a search filter interface. It shows a label "Gender" with a red "X" icon to its left. To the right of the label is a dropdown menu currently displaying "ANY". The entire filter is enclosed in a rectangular box.

Grade Search

Retrieves students based on grades, notes, and comments received during Marking Period and Progress Report grading intervals.

Note: Refer to the Counseling User Guide for more information on Grade Search.

This term has different variations to find students with Assessment grades, Comments, and Ineligible students. This term is not to be used in combination with other terms, such as enrollment, because the options for this type of result filtering are located within the actual search screen. Data is derived from the student's grades and permanent records.

1. Select the type of search to perform (Grade, Ineligible, Assessment, or Comment). The screen will refresh to provide additional related options.
 - A. Grade: Allows users to locate students who meet the specified criteria for either marking period grades, progress report grades, in progress course averages, final course averages, or withdrawn courses. These options locate students with either a specific grade or grade range, specific grade note(s), or those who have not received a grade. If skill sets are defined, users can also locate students based on individual skill grades.

Batch Selector

Grade Ineligible Assessment Comment

☒ Marking Period
☐ Progress Interval
☐ In Progress Average
☐ Final Average
☐ Withdraw

Building: Mindex HS
 School Level: High School
 School Year: 2019-2020
 Marking Period: Quarter 1

☒ Grade:

☒ Grading Scale: 0-100 Range: 0 - 100

☐ Grade Note

☐ No Grade

☐ Skill Set: Skills

 Grammar & Mechanics Range: 0 - 100

 Vocabulary Range: 0 - 100

 Organization Range: 0 - 100

 Effort Range: No - Yes

Filters
 Teacher: ALL
 Course: ALL

- B. Ineligible: Allows users to locate students who have received the selected grade note(s) a specified number of times for the selected marking period or progress report, or for a final course average.

Batch Selector

Grade **Ineligible** Assessment Comment

☒ Marking Period
☐ Progress Interval
☐ Final Average

Building: Mindex HS
 School Level: High School
 School Year: 2019-2020
 Marking Period: Quarter 1

☒ Grade Notes

 None
 Audit
 Excellent
 Fail

Number of Times at Least: 1

Filters
 Teacher: ALL
 Course: ALL

- C. Assessment: Allows users to locate students who have received an assessment score within the designated range or who received an assessment note for either a final exam, midterm, 3-8 assessment, or user defined assessment.

Batch Selector

Grade Ineligible **Assessment** Comment

☒ Finals
☐ Midterms
☐ 3-8 Assessments
☐ User Defined Assessments

School Year: 2019-2020
 Date Taken: All
 Grading Scale: 0-100 Range: 0 - 100
 Assessment Note: ANY

Filters
 Assessment: Local and State
 Course: ALL
 All
 Select

- D. Comment: Allows users to locate students who have received the specified comment(s) for the selected marking period or progress report.

Graduation Requirements

The Graduation Requirements term allows users to locate students based on whether or not they are meeting (or expected to meet/not meet) graduation requirements for their cohort year.

1. To use this batch term, use the first set of radio buttons to indicate whether to search based on Course AND Assessment requirements, Course requirements only, or Assessment requirements only.
2. Use the second set of radio buttons to specify whether to search for students who do or do not meet (or expect to meet) graduation requirements.
3. Finally, use the third set of radio buttons to indicate whether to search for students who do (or do not) currently meet requirements, or for those who are (or are not) expected to meet those requirements.

Home District

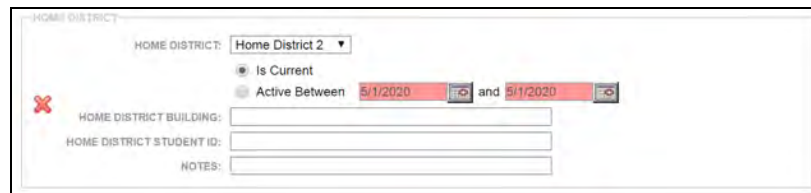
The Home District term allows users to locate students based on their Home District assignments.

1. Select a value from the Home District drop-down to specify whether to include all students, only students assigned to a specific Home District, or only those students not assigned a Home District. This drop-down includes all Home Districts defined in Maintenance, regardless of whether or not they are designated

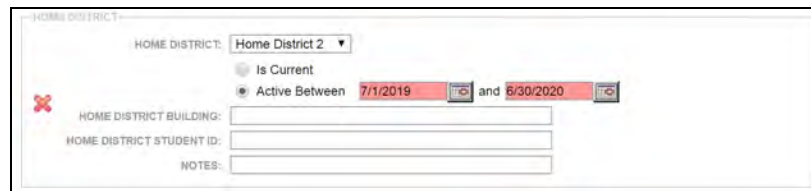
as "active."

2. Specify whether to search based on current home district assignments or only those that were active on a specified date or date range.
 - "Is Current" will return any students who are assigned to the selected home district as of the current date.
 - "Active Between" will return any students who were assigned to the selected home district as of the specified date or date range.
3. If desired, specify a home district building, student ID, and/or note text. Keep in mind that these fields are free-text and may be difficult to find exact matches.

Example: Search for all students that are currently assigned to Home District 2.



Example: Search for all students that were assigned to Home District 2 during the 2019-2020 school year.



Homeroom

Retrieves students based on homeroom assignment. Use the drop-down fields to pick the school building and homeroom. Data is derived from the homeroom designation on the student's enrollment program service record.



1. Select the **Building** from the drop-down list.
2. Select the **Homeroom** number from the drop-down list.
3. Select **NONE** from the drop-down list to retrieve all students who do not have a homeroom assigned in their enrollment records.

Note: There is no way to select all homerooms. To select multiple homerooms, reselect this term from the Search By drop-down list as many times as necessary, each time designating different homeroom values.

Example: Search for all students in the High School Homeroom 115:

Note: This search term only retrieves students with a homeroom designated in their enrollments. This term cannot be used to find students by the period that drives the daily attendance.

Honor Roll

Retrieves students who, for the designated marking period, have met the threshold for the selected roll (i.e. district-designated values such as high honor, honor or merit, etc.). Averages which determine the roll populations are determined and maintained at the district level. Data is derived from thresholds set by the district, behind the scenes, and from the official Marking Period grades received by students.

1. Select the **Building** from the drop-down list.
2. Select the **School Level** from the drop-down list.
3. Select the **School Year** from the drop-down list. (This will default to the current school year.)
4. Select the **Marking Period** from the drop-down list. (This will default to the current marking period (quarter 1, quarter 2, trimester 1, etc.)
5. Select the appropriate **Honor Roll** from the drop-down list:

Example: Search for all High School students who achieved High Honor Roll in Quarter 2:

Immigration

Retrieves students by their last country of residence. Data is derived from the student's Demographics tab information in the Census module.

1. Select the appropriate **Country** from the drop-down list. The default value is United States.

Example: Search for all students who last lived in Germany:

Batch Selector

Country: GERMANY

Immunizations/Vaccinations

Retrieves students who have vaccination and/or immunization records in the Medical module. Data is derived from the Immunizations view on the **Medical > History** tab on the student record.

IMMUNIZATIONS/VACCINATIONS

☒ Having
☐ Not Having

Vaccination: DTAP
 From: 5/1/2020
 To: 5/1/2020

Medical/Religious Exemptions:
☒ Exempt
☐ Non-Exempt
☐ Both

1. Select **Having** or **Not Having** radio buttons. This will designate a search for students who have or are missing their immunization information.
2. Select the appropriate **Vaccination** from the drop-down list. The default value is the first value in the Immunization list, found in the Medical Maintenance area.
3. Enter the **From** and **To** dates to create a range of when the student received this immunization. Use the pop-up calendars to select the dates or manually enter them in the **mm/dd/yyyy** format.
4. Select the Medical/Religious Exemptions radio buttons:
 - Exempt (the default) – finds students whose vaccination has been exempted for medical or religious reasons
 - Non-Exempt – finds students whose vaccination has not been exempted
 - Both

Example: Search for students who have a religious or medical exemption for their Hep B vaccinations within the 2019-2020 school year:

IMMUNIZATIONS/VACCINATIONS

☒ Having
☐ Not Having

Vaccination: HEPB
 From: 7/1/2019
 To: 6/30/2020

Medical/Religious Exemptions:
☒ Exempt
☐ Non-Exempt
☐ Both

Is Placed

Retrieves students who are either placed in your district but are not living in your district, OR who are placed outside of your district, such as at a BOCES provider, but who do live in your district. Data is derived from the student's enrollment program service record. This term is meant to be used in conjunction with District and Enrollment terms.

1. Use the check box to determine the students you wish to locate.



Example: Search for all students who are placed in an outside provider:



Language

Retrieves students by the language(s) designated in their records. Data is derived from the upper portion of the student information record.



1. Select the appropriate **Language** from the drop-down list. The default value is English.
2. Select the appropriate radio button option:
 - Primary: their first language
 - Secondary: their second language

Example: Search for all students whose first language is Urdu:



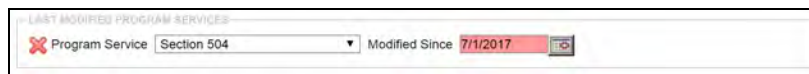
Last Modified Program Services

Retrieves students based on the dates their program service records were updated. Program service records include student enrollment, alternate assessment program, test modifications, etc. Data is derived from the Modified by date on the program service record (found on the student's Student tab in Census.)

1. Select the **Program Service** from the drop-down list.
2. Select the **Modified Since** date. Use the pop-up calendar to select the date or enter the date manually in the **mm/dd/yyyy** format.



Example: Search for all students whose Section 504 program service records have been modified since 7/1/2017:



LAST MODIFIED PROGRAM SERVICES

Program Service Section 504 Modified Since 7/1/2017

Note: The resulting list does not indicate what was modified or dates per student. It is simply a list of students whose records were updated at some point, in some way, since the selected date.

Last Name

Retrieves students based on their last name/surnames. Data is derived from the student's last name/surname, found in the upper portion of the student information record.



LAST NAME

Last Name Group

1. Enter all or part of the student's **Last Name** in the free-text alpha-entry field. This field only accepts letters and hyphens.
 - A. Use the **Group** check box to find groups of students by name or letter ranges. For Example: Select a group of students whose last names begin with a through g (i.e. enter "a-g" in the entry field). This will return students with names such as Allen, Baker, Connor, Davis, Eaton, Frey, Gray, but not those with names such as Miller, Smith, Troy, etc.
 - B. Select a group of students whose last names start with a series of letters, such as Mil and goes through the end of the alphabet (i.e. enter "mil" in the entry field.) This will retrieve students with names such as Milano, Miller, Milton, all the way through Smith, Wyant, etc.
 - C. Select a range of students whose names begin with designated letter sequences (i.e. enter "hib-ter" in the entry field.) This will retrieve names such as Hibbit, Gilman, Miller, Smith, Terry, but not Hannover nor Tyrone.

Example: Search for all students with last names between those starting with "hib" and those starting with "ter":



LAST NAME

Last Name hib-ter Group

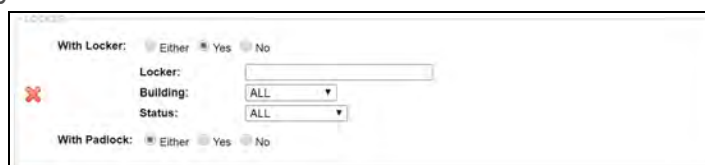
Locker

The “Locker” batch term allows users to search for students based on locker and/or padlock assignments that have been defined in the **Maintenance > Lockers** sub-module. Users can choose whether to specify locker criteria only, padlock criteria only, or both.

A screenshot of a web form titled "LOCKER" in the top left corner. The form contains two sections. The first section, "With Locker:", has three radio buttons: "Either" (selected), "Yes", and "No". The second section, "With Padlock:", also has three radio buttons: "Either" (selected), "Yes", and "No". There is a red "X" icon to the left of the "With Locker:" section.

To locate students based on locker assignments, use options in the “With Locker” section:

- With Locker (radio buttons): Select a radio button to specify which students to locate. Select Either to locate students regardless of whether or not they have been assigned a locker. Select Yes to find all students who have a locker assignment meeting specified criteria, or select No to find all students who do *not* have a locker assignment matching that criteria.
 - Locker (text field): Enter either alpha or numeric text to limit the search to only those lockers whose name contains the specified text.
 - Building: Select a building from the drop-down to limit the search to only those lockers that belong to the selected building. This drop-down is set to “ALL” by default.
 - Status: Select a status from the drop-down to limit the search to only those lockers that have been given the selected status. This drop-down is set to “ALL” by default.

A screenshot of a web form titled "LOCKER" in the top left corner. The form contains two sections. The first section, "With Locker:", has three radio buttons: "Either" (selected), "Yes", and "No". Below this section are three input fields: "Locker:" (a text field), "Building:" (a drop-down menu with "ALL" selected), and "Status:" (a drop-down menu with "ALL" selected). The second section, "With Padlock:", has three radio buttons: "Either" (selected), "Yes", and "No". There is a red "X" icon to the left of the "With Locker:" section.

To locate students based on padlock assignments, use options in the “With Padlock” section:

- With Padlock (radio buttons): Select a radio button to specify which students to locate. Select Either to locate students regardless of whether or not they have been assigned a padlock. Select Yes to find all students who have a padlock assignment meeting specified criteria, or select No to find all students who do *not* have a padlock assignment matching that criteria.
 - Serial Number (text field): Enter either alpha or numeric text to limit the search to only those padlocks whose name contains the specified text.

- **Building:** Select a building from the drop-down to limit the search to only those padlocks that belong to the selected building. This drop-down is set to “ALL” by default.
- **Status:** Select a status from the drop-down to limit the search to only those padlocks that have been given the selected status. This drop-down is set to “ALL” by default.

To locate students based on both Locker *and* Padlock assignment, select either Yes or No for both “With Locker” and “With Padlock” sections. Using both sections will allow users to locate students who have only locker assignments, only padlock assignments, both a locker *and* a padlock, or neither.

Master Schedule/Course Selection

Retrieves students based on the courses they are scheduled in or the requests they have made. Data is derived from the student’s Schedule tab or the Course Selection tab in the Scheduling module.

1. Select **With** or **Without** radio buttons. These buttons indicate if the student is currently enrolled in this course in the Master schedule or not, or if the student has a request for this course or not.

- When "Selected Courses" is chosen from the drop-down, an additional field for **Selection Type** will appear. This drop-down contains three options: Regular School Year (default), Summer School, and ANY.
2. Select the **Building School Level** where the class is located/attended from the drop-down list.
 3. Select the **School Year** during which the class or request is valid from the drop-down list.
 4. Select the **Department** the course falls under from the drop-down list. This selection drives the values that appear in the Course drop-down list, so wait for the screen to refresh before moving on.
 5. Select the **Course** name from the drop-down list. This field will display department-specific courses. You may select ALL to view all courses from the selected department (if ALL is selected, the Section drop-down will become unavailable).
 6. Select the **Section** from the drop-down list. This field will display all sections of the selected course. You may select ALL to retrieve all students in all sections.
 7. Select one or more **Semesters** using the checkboxes to indicate where you want to find this course for the student.

Example 1: Search for all students scheduled for section 1 of English 12:

The screenshot shows the 'MASTER SCHEDULE / COURSE SELECTION' form. The 'Students' section has 'With' selected. The 'Building School Level' is 'Mindex HS' and 'High School'. The 'School Year' is '2023-2024'. The 'Department' is 'English'. The 'Course' is 'ENGLISH 12 (02341)'. The 'Section' is 'ENGLISH 12 - Period: 4 - Section: 1'. The 'Semester' section has both 'Fall Semester' and 'Spring Semester' checked.

Example 2: Search for all students who are *not* scheduled for a Math class this year:

The screenshot shows the 'MASTER SCHEDULE / COURSE SELECTION' form. The 'Students' section has 'Without' selected. The 'Building School Level' is 'Mindex HS' and 'High School'. The 'School Year' is '2023-2024'. The 'Department' is 'Math'. The 'Course' is 'ANY'. The 'Section' is 'ANY'. The 'Semester' section has both 'Fall Semester' and 'Spring Semester' checked.

Example 3: Search for all students who have a Regular School Year course selection for Spanish 1:

Example 4: Search for all students who have a Summer School course selection for Living Environment:

Medical History

Use this criterion to retrieve students based on their Medical Alerts, Conditions, Operations, and Serious Injuries. Data is derived from the student's Medical Information **History** tab.

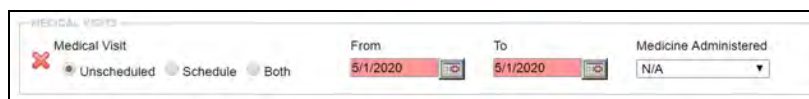
1. Select the appropriate **Condition** and **Condition Type** from the drop-down menus.

Example 1: Search for all students who have Diabetes:

Example 2: Search for all students who have a medical alert for an allergy:

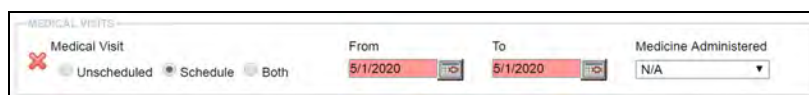
Medical Visits

Use this term to retrieve students based on their history of visits to the nurse, and/or based on their having received specific medications during planned visits. Data is derived from the All Visits view on the **Medical Information > Visits** tab on the student record.



1. Select the appropriate radio button (choose one):
 - **Unscheduled** – retrieves students who had an unscheduled visit during the date range (regardless of medication selected);
 - **Scheduled** – retrieves students who had a scheduled visit to receive the selected medication (or any medication) during the date range;
 - **Both** – retrieves all students with any kind of visit and any kind of medication.
2. Enter the **From** and **To** dates to create a range. Use the pop-up calendars to select the dates or manually enter them in the **mm/dd/yyyy** format.
3. Select the appropriate **Medicine Administered** from the drop-down list:
 - The default value is N/A.
 - Choose the Any Med Given option if you wish to find all students who had scheduled visits, regardless of medication.
 - This field is ignored if the **Unscheduled** radio button is selected.

Example 1: Search for all students who had a scheduled visit on a single date:



Example 2: Search for all students who received any medication during any medical visits for a single date:



Missing Students

Retrieves students who have missed or skipped classes within a specific date range. Data is derived from period attendance records which can be seen in the **Discipline > Missing Students** sub-module.

1. Enter the **From** and **To** dates to create a range and the **Periods Missed** in the free-text field provided. The Periods Missed indicates the number of periods missed during that date range (count), not the actual period number.
2. Use the multi-select **Reason** box to select appropriate reason(s) to narrow your search.

Example: Search for all students with 1 period missed in this date range, regardless of absence reason:

Example 2: Search for all students with 2 skipped periods in this date range:

Note: For more information on missing students, refer to the Discipline User Guide.

NYS Reported Grade

Retrieves students who have the specified NYS Reported Grade in their official enrollment records. Data is derived from the Alternate NYS Reported Grade field on the student's enrollment.

Example: Search for all students with an Alternate NYS Reported Grade of "Ungraded Secondary, 7-12" to locate all ungraded secondary (UGS) students:

Order of Protection

Retrieves students based on orders of protection which have validity dates in the specified range. Data is derived from the Order of Protection note found on the student's Notes tab.

ORDER OF PROTECTION

✖ Order Of Protection From 7/9/2020 To 7/9/2020

☒ Expires in date range
☐ Active on end date

1. Enter the **Order of Protection From** and **To** dates to create a range. Use the pop-up calendars to select the dates or manually enter them in the **mm/d-d/yyyy** format.
2. Select the appropriate radio button:
 - Expires in date range: for orders that end or ended during the specified date range;
 - Active on end date: for orders that were still active as of the last date of the specified date range (i.e., they hadn't or haven't yet expired.)

Example 1: Search for all students with Orders of Protection which expired in the month of January:

ORDER OF PROTECTION

✖ Order Of Protection From 1/1/2020 To 1/31/2020

☒ Expires in date range
☐ Active on end date

Example 2: Search for all students with active orders as of the end of January:

ORDER OF PROTECTION

✖ Order Of Protection From 1/1/2020 To 1/31/2020

☐ Expires in date range
☒ Active on end date

Pending Student Schedule Changes

Retrieves students who have pending schedule changes which were created by either using the **Counseling > Batch Edit Schedule** sub-module or in an individual student record based on the date range selected.

PENDING STUDENT SCHEDULE CHANGES

✖ Pending Schedule Changes Between 7/1/2019 And 6/30/2020

Post Graduate Plan

The Post Graduate Plan term allows users to search for students who have a Post Graduate Plan meeting the specified criteria. To search, simply select "Has" or "Does Not Have" and then enter the criteria on which to search. Any students with a Post Graduate Plan matching the criteria entered here will be included in the search results.

POST GRADUATE PLAN

Post Graduate Plan: ☒ Has ☐ Does Not Have

Update received between: and

Plan: ANY

Source:

Notes:

Example: Search for all students who have a post graduate plan of "Enlist in the Military" for any date range:

POST GRADUATE PLAN

Post Graduate Plan: ☒ Has ☐ Does Not Have

Update received between: and

Plan: Enlist in the military

Source:

Notes:

Example 2: Search for all students who have *not* received an update on their post graduate plan during the date range of 9/1/2019 and 12/31/2019

POST GRADUATE PLAN

Post Graduate Plan: ☐ Has ☒ Does Not Have

Update received between: 9/1/2019 and 12/31/2019

Plan: ANY

Source:

Notes:

Program Services

Retrieves students by program service. Program services include any of the values found in the drop-down list. Use this term to find students by enrollment type, or to find those with a disability. Data is derived from program service records set up in a student's Student tab.

PROGRAM SERVICE

Program Service: AIS

From: 7/1/2019 To: 6/30/2020

Entry Reason: ALL

Exit Reason: ALL

Service or Monitor: ☒ Service ☐ Monitor ☐ Both

Service Type: ☒ Academic ☐ Support

Frequency/Intensity: ALL

Building: ALL School Level: ALL Department: ALL

Teacher: SELECT ONE

Funding: ☒ Only Unfunded in a Funded Building

1. Select the **Program Service**(such as Enrollment, Disability, etc.) from the drop-down field.
2. Click once in the **Type** checkbox to specify the type of program service (i.e. If program service is Enrollment, the type might be foreign exchange; if program

service is Disability, the type might be vision impairment.) The screen will refresh with a Type drop-down box with additional options.

Note: The fields available on the screen will depend on the Program Service that you select. For example, if you select AIS, you will see the several fields to select, including Date Range, Entry Reason, Exit Reason, Service or Monitor, Service Type, Frequency/Intensity, Building, School Level, Department, and Teacher. If you select Disability, you will only see options for Type and a Date Range.

Example: Retrieve students based on AIS program services (assuming you have it set up in Maintenance) in the High School for 2018-2019:

1. Select the Program Service term from the Search By drop-down list.
2. Select AIS from the **Program Service** drop-down list (it should be the default value).
3. Select the options that you want to search for such as the Entry Reason, Exit Reason, Service or Monitor, Service Type, Frequency, Building/School Level/Department, and Instructor.
4. Click on search when you have finished making your selections.

Note: The option of "All" is available throughout the term, saving the user from having to be too specific when specifying desired criteria. For instance, locating all AIS program services that were active this year can now be done by leaving all default options set at ALL, as displayed.

The following fields can be set to "All"

- Entry
- Exit
- Academic
- Support
- Frequency/Intensity

The screenshot shows a web-based search form titled "Batch Selector". The "Program Service" dropdown is set to "AIS". The date range is set from "7/1/2018" to "6/30/2019". The "Entry Reason" and "Exit Reason" dropdowns are both set to "ALL". The "Service or Monitor" section has radio buttons for "Service", "Monitor", and "Both", with "Service" selected. The "Service Type" section has radio buttons for "Academic" and "Support", with "Academic" selected and a dropdown set to "ALL". The "Frequency/Intensity" dropdown is set to "ALL". The "Building" dropdown is set to "Mindex HS", "School Level" is set to "High School", and "Department" is set to "ALL". There is a "Teacher" dropdown set to "SELECT ONE". At the bottom, there is a "Funding" checkbox labeled "Only Unfunded in a Funded Building" which is unchecked.

Example 2: Retrieve students by Disability using the Program Services term.

1. Select the Program Service term from the Search By drop-down list.
2. Select Disability from the **Program Serviced** drop-down list.
3. Click on Type and select the Disability you are looking for.
4. Click on search when you have finished making your selections.

Projected Enrollment

Retrieves students who will begin enrollment in a district school in the designated year. Data is derived from the Projected Enrollment records found in the Student tab. This term will locate all students who are projected to enroll in a building to which the user has rights. This includes out of district students, new students to the district with no previous enrollments, incoming Kindergarten students, and students coming from other building school levels in the district.

1. Specify whether to locate students with **In District** or **Out Of District** projected enrollments using the radio buttons.
- Note:** Selecting the Out Of District option will only return results when using this term to search from within the Census and Counseling modules.
2. Select the **Building** the student will be enrolled in from the drop-down list.
3. Select the **School Level** the student will be in from the drop-down list.
4. Select the **Grade** the student will be in from the drop-down list.
5. Select the **School Year** the student will begin in the district from the drop-down list.
6. Enter the **Projected to enroll from** and **to** dates. Use the pop-up calendars or enter the dates manually in the **mm/dd/yyyy** format.

Note: The defaulted from and to dates are the current school year and may need to be updated to reflect the selected school year.

Example: Search for all students who will begin enrollment at the High School in the 2019-2020 school year:

Example: Search for all students who will begin an Out of District enrollment at “Mindex CSD” in the 2019-2020 school year:

PROJECTED ENROLLMENT

☐ In District ☒ Out Of District

District: MINDEX CSD Grade: ALL School Year: 2020-2021

Projected to enroll from 7/1/2019 to 6/30/2020

Report Name

This term is used to add a custom report title to the top of the Census Report. It can also be used to add a title to the top of the "Quick Report" that displays at the top of the search results grid after running an advanced search. This is useful for users seeking to differentiate several Census Reports which all contain different populations of students. This term is intended to be used with other terms. Using it alone will not result in a report.

Note: This term is only set up to work with Census reports and the Quick Report of advanced search results. It cannot be used to add a custom title to other canned reports.

REPORT NAME

Report Name

To use the Report Name feature to add a custom report title:

1. Add and define Batch Selector terms to retrieve a group of students.
2. Add the Report Name term from the Search Criteria drop-down list.
3. Type a title into the free-text Report Name field.
4. Perform the search.
5. Click to Run the Report. The title will appear at the top of the report.

Example: Search for all JV and Varsity Soccer players (using the Activity term) and name the report "Soccer Players"

ACTIVITY

Activity: Boys Soccer - JV School Year: 2019-2020

Activity: Boys Soccer - Varsity School Year: 2019-2020

Activity: Girls Soccer - JV School Year: 2019-2020

Activity: Girls Soccer - Varsity School Year: 2019-2020

Report Name: Soccer Players

The report title appears at the top (just under the report title when running reports from **Census > Reports**).

Soccer Players							
						5/1/2020 17 matches found	
Last Name	First Name	MI	ID	Address	Phone Number	Age	Grade Homeroom
Harper	Walter	T	18457	4293 Molino Bridge Road	H: (555) 429-0843	18	12
Hill	Donna	J	19930	119 Pine Level Church Road	H:	16	11
Hill	Edward	D	29298	1078 Wagonwheel Circle	H:	18	12
James	Jason	J	19708	93 Bridle Court	H: (555) 430-4580	17	11

RTI

The RTI batch term allows users to locate students based on RTI records.

RTI

DATES: 5/1/2020 to 5/1/2020

LEVEL: ANY

TYPE: ANY

TIMELINE: ANY

FACULTY: ALL

1. Specify a date range to locate records active during that time.
2. Specify a Level, Type, and/or Timeline to locate RTI records based on those specific details.
3. Specify a Faculty department and/or name to include only those students who have an RTI tied to the selected faculty member(s).

Example: Locate all students with an active RTI during the 2012-2013 school year.

RTI

DATES: 7/1/2012 to 6/30/2013

LEVEL: ANY

TYPE: ANY

TIMELINE: ANY

FACULTY: ALL

Example: Locate any student with an RTI Level of “Tier 1” during the 2012-2013 school year.

RTI

DATES: 7/1/2012 to 6/30/2013

LEVEL: Tier I

TYPE: ANY

TIMELINE: ANY

FACULTY: ALL

Example: Locate any student with an RTI assigned to the English teacher Sarah Clark during the 2012-2013 school year.

RTI

DATES: 7/1/2012 to 6/30/2013

LEVEL: ANY

TYPE: ANY

TIMELINE: ANY

FACULTY: English Clark, Sarah

Example: Locate all unassigned RTI records for the 2012-2013 school year.

Batch Selector search criteria form showing filters for dates, level, type, timeline, and faculty.

Saved Results

Retrieves a group of students that were previously saved in the My Home Preferences area as a result set. This allows the user to quickly access a group of students and also to combine the group with other criteria. (Saved Results differ from Saved Criteria in that users can modify the results by un-checking boxes next to any students who should not be included, thereby saving a customized group. Saved Criteria simply saves the combination of terms, retrieving results which could differ from time to time as the database is updated.) Data is derived from the list of saved results found in the user's **Home > Preferences** sub-module.

Saved Results dropdown menu showing a saved group named '18-19 Hernandez'.

To create a **Saved Results** group, do the following (reference the Saved Results section at the beginning of this manual for more information):

1. Go to **Home > Preferences** and click on the Saved Results tab.
2. In the Search area, use the Batch Selector to retrieve a group of students.
3. Deselect any students who should not be part of the group.
4. Click once on Continue.
5. Enter a name for this group of students.
6. Click once on the green Save  button.
7. Once one or more Saved Results sets have been saved, you can use the Saved Results term in an advanced search by selecting it from the dropdown.

Screenings/Physicals

Use this term to retrieve students with various screening records and/or physical exam records for the specified date range. Data is derived from the student's Medical Information **Screening** and **History** tabs.

Screenings/Physicals search form with checkboxes for 'Having' and 'Not Having' screening/physicals, and a date range from 5/1/2020 to 5/1/2020.

1. Select the appropriate check box(es).
2. Select **Having** or **Not Having** the screening or physical. This will give you a list of students depending on if they have the recorded screening or physical in their

medical record.

Note: If you select multiple check boxes, an "OR" statement is created, and any students with **one or more** of the selected criteria will be returned.

- Hearing – retrieves students who have hearing screening records within the selected date range.
 - Scoliosis – retrieves students who have scoliosis screening records within the selected date range.
 - Vision – retrieves students who have vision screening records within the selected date range.
 - Physical – retrieves students who have physical exam records within the selected date range.
3. Enter the **From** and **To** dates to create a range. Use the pop-up calendars to select the dates or manually enter them in the **mm/dd/yyyy** format.

Example 1: Search for all students who have had Hearing and/or Scoliosis screenings on a single date:

SCREENINGS/PHYSICALS

Screening/Physical

☒ Having ☐ Not Having

☒ Hearing ☒ Scoliosis ☐ Vision ☐ Physical

From: 5/1/2020 To: 5/1/2020

Example 2: Search for all students who did not have a Physical exam in the 2018-2019 school year:

SCREENINGS/PHYSICALS

Screening/Physical

☐ Having ☒ Not Having

☐ Hearing ☐ Scoliosis ☐ Vision ☒ Physical

From: 7/1/2018 To: 6/30/2019

Special Education

Retrieves students who have been designated as special education students in their program services records. Data is derived from the Special Education flag in the student Enrollment and/or General program service record.

Only use this to restrict a search to Special Education only. Click once in the **Special Education** check box. If this term is not selected, all students (special education and regular education) are included in the search results.

SPECIAL EDUCATION

☒ Special Education

Student ID

Retrieves an individual student based on his/her unique student ID. Data is derived from the student ID which is generated from within the system as student records are created, or which is manually added in the general program service of a student's tab in Census. Used alone, it will only return results for actively enrolled students for the current school year.

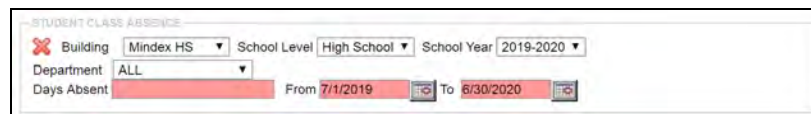
A screenshot of a web form titled "STUDENT ID". It features a red "X" icon on the left and a text input field labeled "Student ID" on the right.

1. Enter the **exact Student ID** into the numbers-only entry field. (Entering a partial ID will **not** retrieve any student IDs which share the common numbers.)

Note: If you enter an ID for a student who has left the district you will get a No Students Found message unless you combine the ID with District or Enrollment information.

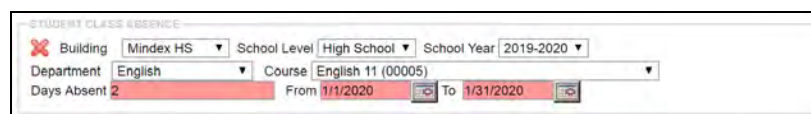
Student Class Absence

Retrieves students based on the number of absences from a particular class. Data is derived from a student's period attendance records. This term can be combined with other terms.

A screenshot of a web form titled "STUDENT CLASS ABSENCE". It contains several fields: "Building" (dropdown menu), "School Level" (dropdown menu), "School Year" (dropdown menu), "Department" (dropdown menu), "Days Absent" (text input field), "From" (date input field), and "To" (date input field). The "From" and "To" fields are highlighted in red.

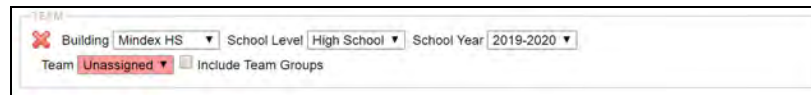
1. Select the **Building**, **School Level**, and **School Year** from the menu drop-down lists.
2. Chose the **Department** that you wish to find absences for. (Here you can select ALL). If you select a single department, the screen will refresh with a course drop-down list.
3. Enter the number of **Days Absent** in the numeric free-text field, and then select the appropriate **Date Range** using the **mm/dd/yyyy** format or the pop-up calendar.

Example: Search for all students with at least 2 absences from English 11 in the month of January:

A screenshot of the "STUDENT CLASS ABSENCE" form with example values entered. The "Building" dropdown is set to "Mindex HS", "School Level" is "High School", and "School Year" is "2019-2020". The "Department" dropdown is set to "English", and the "Course" dropdown is set to "English 11 (00005)". The "Days Absent" field contains the number "2". The "From" date field is set to "1/1/2020" and the "To" date field is set to "1/31/2020". The "From" and "To" fields are highlighted in red.

Team

Retrieves a group of students who have been assigned to a team or teams or who have not been assigned to a team yet. Data is derived from teams set up in the **Scheduling > Teaming Maintenance** sub-module.



1. Select the **Building** the team belongs to from the drop-down list.
2. Select the **School Level** the team belongs to from the drop-down list.
3. Select the **School Year** the team is valid for from the drop-down list.
4. Select the **Team** name from the drop-down list.
 - If you wish to select a Team Group instead, click the “Include Team Groups” checkbox. Team Groups will appear at the end of the Team list, after all individual teams.

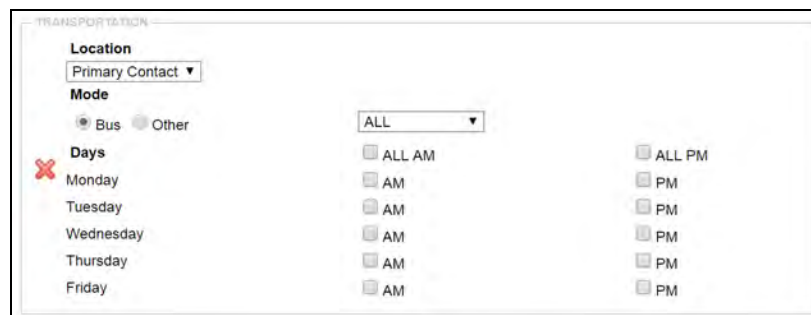
Example: Search for all students assigned to the “Blue 8” team in the Middle School:



Note: For more information about Teams, reference the Scheduling User Guide.

Transportation

Retrieves a student or students who have specific transportation designations, such as the location where they go after school, the mode of transportation they use to get to that location, the days of the week they use that transportation, etc. Data is derived from the student’s Transportation record, available from within the Transportation module.



1. Select the **Location** from the drop-down menu:
 - Any retrieves students regardless of the location specified for before/after school.

- Primary Contact: retrieves all students who come from/go to their primary residence before/after school;
 - Other Contact: retrieves all students who come from/go to the residence of another contact (other than their primary contact's residence) before/after school;
 - Other Location: retrieves all students who come from/go to a non-residence before/after school, such as a day-care provider, YMCA or other after-school program. When this radio button is selected a drop-down list of locations will appear. The default value is ALL.
2. Select the **Mode**(of transportation) radio button (one or the other):
 - Bus – select the bus number that the student takes to/from school from the drop-down list. The default value is ALL.
 - Other – select the Other type of transportation that the student takes to/from school from the drop-down list. The default value is ALL.
 3. Select the **Days**(and times) the above selections are valid for by checking the appropriate check box(es) for the times (AM or PM) for each day of the week: Monday, Tuesday, Wednesday, Thursday, and/or Friday. AM indicates that the student uses this mode of transportation or comes from this location on their way to school; PM indicates that the student uses this mode of transportation or goes to this location after school.

Example: Search for all students who go to the YMCA after school, on bus 36, every day of the week:

TRANSPORTATION

Location: Other Location ▼ YMCA ▼

Mode: ☒ Bus ☐ Other 36 ▼

Days: ✗ Monday, Tuesday, Wednesday, Thursday, Friday

AM/PM checkboxes:

Day	ALL AM	AM	PM
Monday	☐	☐	☒
Tuesday	☐	☐	☒
Wednesday	☐	☐	☒
Thursday	☐	☐	☒
Friday	☐	☐	☒

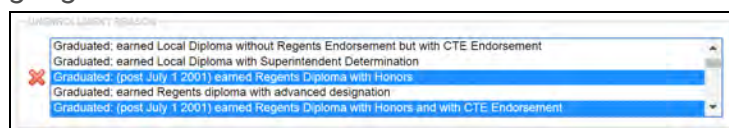
Un-enrollment Reason

Retrieves students based on the reason their enrollment program service record was ended. Data is derived from the student's ended enrollment record found in the Student tab.

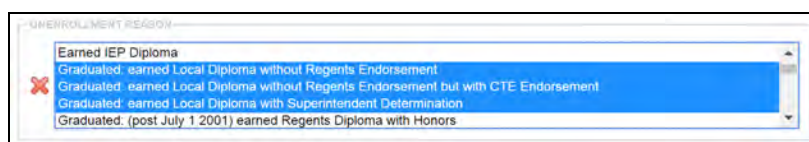
UNENROLLMENT REASON

Dropdown menu options: All, Completed grade, Completed Highest Grade in This School - No Credential Awarded, Deceased, Earned IEP Diploma

1. Select the un-enrollment reason or reasons from the multi-select list box.
2. To select multiple reasons, click once on the first reason, then hold down the control (CTRL) key and click the others. As you do this, you will see multiple reasons highlighted.



Example: Search for students who have earned any of the Local Diploma options:



User Defined Assessment

The User Defined Assessments term allows users to search for students based on user defined assessments records on the Assessments tab of the student record. When the User Defined Assessments term is selected, the batch term will appear with a drop-down where the user may choose the specific user defined assessment to search for. Users must select the appropriate user defined assessment as well as the school year associated with the record(s). In addition, all active fields from the user defined assessment are searchable. Each field will display the field type and the user may enter text or numbers, or may select radio button options, to specify the search criteria.

Any drop-downs configured in Maintenance for this user defined assessment will also appear on this search term, and the user may select any item from the drop-down to search for fields containing that value. Wild card searches are supported for all text or number fields, allowing users to search free text fields as well. If the screen contains a checkbox field, the user may specify the batch term criteria to include all records or only those where that field is checked or unchecked.

Note: If you do not have access to view any User Defined Assessments, you will receive a message indicating this when you add the User Defined Assessments term to your search criteria and this term will be ignored in your search.

USER DEFINED ASSESSMENT
✖ You have permission to use this term but do not have view rights for any User Defined Assessments.

Example: Search for all students who have a record with an Instructional Level of "A" in 2019-2020 for the Fountas & Pinnell Benchmark user defined assessment.

USER DEFINED ASSESSMENT

Having Fountas & Pinnell Benchmark in 2019-2020

Test Date: From 7/1/2019 To 6/30/2020

Instructional Level: From A To A

✖ Independent Level: From ANY To ANY

Accuracy (Integer): From To

Comprehension (Integer): From To

Fluency (Integer): From To

User Defined Screen

The User Defined Screen batch term allows users to search for students based on records in the User Defined tab of the student record in the My Home module. When the User Defined Screen term is selected, the batch term will appear with a drop-down where the user may choose the specific user defined screen to search for, as well as a date range during which the record was active. In addition, all active fields from the user defined screen are searchable. Each field will display the field type and the user may enter text or numbers, or may select radio button options, to specify the search criteria.

USER DEFINED SCREEN

Having Student Parking active between 5/1/2020 and 5/1/2020

Car Make (Text):

Car Model (Text):

Color (Text):

License Plate (Text):

✖ Drives Others?: ☒ Either ☐ Yes ☐ No

Approval Date: From to

Lot Assignment: ANY

Notes (Text):

- Any drop-downs configured in Maintenance for this user defined screen will also appear on this search term, and the user may select any item from the drop-down to search for fields containing that value.
- Wild card searches are supported for all text or number fields, allowing users to search free text fields as well.
- If the screen contains a checkbox field, the user may specify the batch term criteria to include all records or only those where that field is checked or unchecked.

Note: If you do have access to view any User Defined Screens, you will receive a message indicating this when you add the User Defined Screens term to your search criteria and this term will be ignored in your search.

 You have permission to use this term but do not have view rights for any User Defined Assessments.

Example: Search for all students who drive blue cars and are assigned to Senior Lot A.

USER DEFINED SCREEN

Having **Student Parking** active between **5/1/2020** and **5/1/2020**

Car Make (Text):

Car Model (Text):

Color (Text):

License Plate (Text):

Drives Others?: ☒ Either ☐ Yes ☐ No

Approval Date: From to

Lot Assignment: **Senior Lot A**

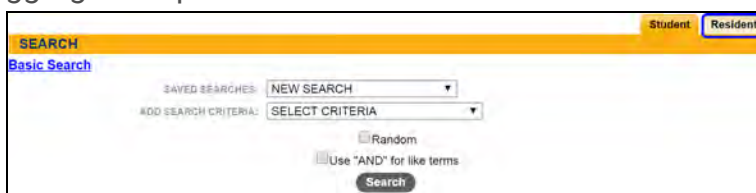
Notes (Text):

Resident Batch Selector Terms

The following details the terms you may use to find district or non-district residents using the Resident tab. (Refer to the section on the Student Batch Selector Terms for details about student-specific terms.)

The Resident tab appears only in the Census module, in the Census Search sub-module and in the following reports:

- Mailing Labels
- Zip Code Aggregate Report

The screenshot shows a web interface for the 'Resident' tab. At the top, there's a yellow header bar with 'SEARCH' on the left and 'Student' and 'Resident' tabs on the right, with 'Resident' being the active tab. Below the header, there's a 'Basic Search' link. The main area contains a 'SAVED SEARCHES' section with a 'NEW SEARCH' dropdown. Below that is an 'ADD SEARCH CRITERIA' section with a 'SELECT CRITERIA' dropdown. There are also checkboxes for 'Random' and 'Use "AND" for like terms'. At the bottom is a 'Search' button.

The terms found in the Resident tab are more limited than those found in the Student tab. Users can select from and/or combine the following:

- Address
- Carrier Code
- City
- County
- Custody Alert
- District
- Enrollment
- Immigration
- Last Name
- Report Name
- State
- Zip

These are detailed with examples on the following pages.

Address

Retrieves residents based on a specified set of address criteria (including street address and other fields pertaining to addresses). This is useful for finding all residents who live in a particular neighborhood or on a particular street for census reports or mailings. Data is derived from Residence Addresses listed in the Census module.

Address criteria can include a street name and/or unit or building number.

1. To search, first specify the address type (ANY, Residence, Mailing, or Work), then specify the search type (Detailed Address, General Address, or No Address).
 - A. Users may select the Detailed Address option (this is the default) to locate records by entering values in one or more specific fields in an address. All text fields on the screen accept wildcards.
 - B. Use the General Address option to use the wildcard search (this represents previously existing functionality and allows users to search for any street address containing that value).
 - C. Users may also search for any person with *no* address (emancipated students or those with no address record). Select the appropriate radio button to choose the search option.

Address Type: Residence Detailed Address General Address No Address

Address: Unit #:

County: ANY District: ANY Sequence Number:

Dwelling Type: ANY Carrier Code: Designatable: ANY

Phone Number: Is Listed: ANY

Note: Zones are created for districts to determine where a child will go to school depending on their address. If your district does not use Address Zones, this term will not retrieve any records.

Example 1: Search for all residents who have a mailing zip code of 90210:

Address Type: Mailing Detailed Address General Address No Address

Address: Unit #:

County: ANY District: ANY Sequence Number:

Dwelling Type: ANY Carrier Code: Designatable: ANY

Phone Number: Is Listed: ANY

Example 2: Search for residents with an address record that contains the word “bay” in the street address:

Address Type: Residence Detailed Address General Address No Address

Address Contains:

County: ANY District: ANY Sequence Number:

Dwelling Type: ANY Carrier Code: Designatable: ANY

Phone Number: Is Listed: ANY

Example 3: Search for all residents who do not have a residence address:

Address Type: Residence Detailed Address General Address No Address

Carrier Code

Retrieves residents who share a common carrier code. A carrier code is the group of addresses to which the US Postal Service assigns the same code to aid in mail delivery. These codes are 9 digits in length: five (5) numbers for the ZIP Code, one (1) letter for the carrier route type, and three (3) numbers for the carrier route number. For example "05055R003" or "12508C007." Typically, each carrier route is related to where a particular mail carrier delivers.

A search field with a red 'X' icon on the left and the text "Carrier Code" followed by an empty input box.

Data is derived from the carrier code information entered when a new address is added to the system. Carrier codes are often associated with rural mailing addresses.

A screenshot of a software interface showing address details. The "Carrier Code" field is highlighted with a blue box. The details include: 1795 Bullard Road, Rochester, NY 12345, (555) 435-7647, and Carrier 05055R003, MONROE CITY CSD, New Monroe.

1. Enter the **Carrier Code** information.

Example: Search for residents whose carrier codes start with 123:

A search field with a red 'X' icon on the left and the text "Carrier Code" followed by an input box containing the text "123".

Note: Carrier Codes are only used in some districts. If your district is not using them, this term will not retrieve any records.

City

Retrieves those residents living in the same city. Data is derived from the Resident Address information.

1. Enter the **City** name in the entry field.

A search field with a red 'X' icon on the left and the text "City" followed by an empty input box.

Example 1: Search for residents who live in the city of Rochester:

A search field with a red 'X' icon on the left and the text "City" followed by an input box containing the text "Rochester".

County

Retrieves those residents living in the same county. Data is derived from the Resident Address information.

1. Select the **County** from the drop-down list. The list will default to the county where the district is located.

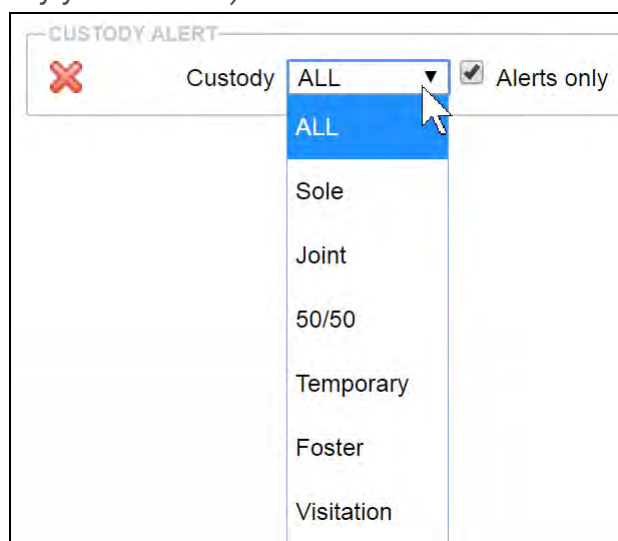
A screenshot of a web interface showing a filter for 'COUNTY'. It includes a red 'X' icon, a label 'County', and a dropdown menu currently displaying 'Monroe'.

Custody Alert

Use this term to locate residents who may have custody rights for a student or students. For example, they may share joint or 50/50 custody with another person, they may have sole custody of one or more students, or their record may contain another district-defined custody term. Data is derived from student Contact tabs.

A screenshot of a web interface showing a filter for 'CUSTODY ALERT'. It includes a red 'X' icon, a label 'Custody', a dropdown menu displaying 'ALL', and a checked checkbox labeled 'Alerts only'.

1. Select the **Custody** type from the drop-down list (the list will display all custody values defined by your district).

A screenshot of the 'CUSTODY ALERT' dropdown menu. The menu is open, showing options: 'ALL' (highlighted), 'Sole', 'Joint', '50/50', 'Temporary', 'Foster', and 'Visitation'. The interface also shows a red 'X' icon, a 'Custody' label, and a checked 'Alerts only' checkbox.

2. Check or un-check the “Alerts Only” option as needed. If checked, the search will return only those custody types that are tied to an alert. If unchecked, the search will return *all* custody types.

Example: Search for residents who have a Visitation custody alert for one or more students:

A screenshot of a web interface showing the 'CUSTODY ALERT' filter. The 'Custody' dropdown menu is now set to 'Visitation', and the 'Alerts only' checkbox remains checked.

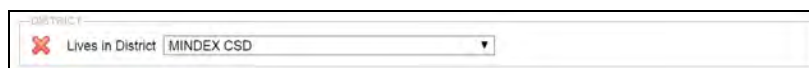
District

Retrieves residents who live in the selected district. Data is derived from the district information linked to the Residence Address.

The Lives in District drop-down list will default to your school district. Select an alternate district from the drop-down list if appropriate.

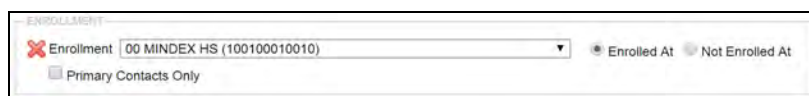
A screenshot of a web form titled "DISTRICT". It contains a red "X" icon and the text "Lives in District". To the right is a dropdown menu currently displaying "OTHER".

Example: Search for residents who live in the Mindex CSD district:

A screenshot of a web form titled "DISTRICT". It contains a red "X" icon and the text "Lives in District". To the right is a dropdown menu currently displaying "MINDEX CSD".

Enrollment

Retrieves residents who have (or don't have) students enrolled in the selected district. Data is derived from the enrollment program service records of students who are tied to residents.

A screenshot of a web form titled "ENROLLMENT". It contains a red "X" icon and the text "Enrollment". To the right is a dropdown menu displaying "00 MINDEX HS (100100010010)". Below the dropdown are two radio buttons: "Enrolled At" (selected) and "Not Enrolled At". At the bottom is a checkbox labeled "Primary Contacts Only" which is checked.

1. Select the **Enrollment** information (name of the school) from the drop-down list. Make sure to select the exact school name, and not the general district identifier, as this term works with the enrollment data, which is by school name, not district.
2. Select the appropriate radio button:
 - Enrolled At: this resident has one or more students enrolled in the selected school.
 - Not Enrolled At: this resident does not have any students enrolled in the selected school.
3. Click once in the **Primary Contacts Only** check box to retrieve primary contacts of students only.

Example: Search for district residents who are primary contacts of students enrolled in the non-district provider, Mindex Charter School:

A screenshot of a web form titled "ENROLLMENT". It contains a red "X" icon and the text "Enrollment". To the right is a dropdown menu displaying "MINDEX CHARTER SCHOOL (0123456789)". Below the dropdown are two radio buttons: "Enrolled At" (selected) and "Not Enrolled At". At the bottom is a checkbox labeled "Primary Contacts Only" which is checked.

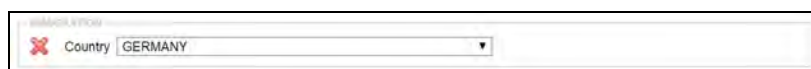
Immigration

Retrieves residents by their Last Country of residence. Data is derived from the Demographics tab of a resident record in the Census module.

1. Select the appropriate **Country** from the drop-down list. The default value is United States.

A screenshot of a web form titled "IMMIGRATION". It features a red "X" icon on the left and a dropdown menu labeled "Country" with "UNITED STATES" selected.

Example: Search for residents whose Last Country of Residence is listed as Germany:

A screenshot of a web form titled "IMMIGRATION". It features a red "X" icon on the left and a dropdown menu labeled "Country" with "GERMANY" selected.

Last Name

Retrieves residents based on their last name/surnames. Data is derived from last names/surnames found in the upper portion of the resident (person) information record.

1. Enter all or part of the resident's **Last Name** in the free-text alpha-entry field. This field only accepts letters and hyphens.

A screenshot of a web form titled "LAST NAME". It features a red "X" icon on the left, a text input field labeled "Last Name", and a checkbox labeled "Group".

2. Use the **Group** check box to find groups of residents by name or letter ranges. For Example: Select a group of residents whose last names begin with a through g (i.e. enter "a-g" in the entry field). This will return residents with names such as Allen, Baker, Connor, Davis, Eaton, Frey, Gray, but not those with names such as Miller, Smith, Troy, etc.
 - A. Select a group of residents whose last names start with a series of letters, such as Mil and goes through the end of the alphabet (i.e. enter "mil" in the entry field.) This will retrieve residents with names such as Milano, Miller, Milton, all the way through Smith, Wyant, etc.
 - B. Select a range of residents whose names begin with designated letter sequences (i.e. enter "hib-ter" in the entry field.) This will retrieve names such as Hibbit, Gilman, Miller, Smith, Terry, but not Hannover nor Tyrone.

Example: Search for residents whose last names begin with B, C, D, E or F:

A screenshot of a web form titled "LAST NAME". It features a red "X" icon on the left, a text input field labeled "Last Name" containing "B-F", and a checked checkbox labeled "Group".

Report Name

This term is used to add a custom report title to the top of the "Quick Report" that displays at the top of the search results grid after running an advanced search. This is useful for users seeking to differentiate several Reports which all contain different populations. This term is intended to be used with other terms. Using it alone will not result in a report.

A screenshot of the 'REPORT NAME' section in a search criteria form. It features a red 'X' icon, the label 'Report Name', and an empty text input field.

To use the Report Name feature to add a custom report title:

1. Add and define Batch Selector terms to retrieve results.
2. Add the Report Name term from the Search Criteria drop-down list.
3. Type a title into the free-text Report Name field.
4. Perform the search.
5. Click Quick Report icon at the top of the results grid. The title will appear at the top of the report.

Example: Generate a report of parents whose students are enrolled in "Mindex Charter School" and use a custom title of "Charter Parents" for the report:

A screenshot of the search criteria form. The 'ENROLLMENT' section shows 'MINDEX CHARTER SCHOOL (0123456789)' selected in a dropdown, with radio buttons for 'Enrolled At' (selected) and 'Not Enrolled At'. A checkbox for 'Primary Contacts Only' is checked. The 'REPORT NAME' section shows 'Charter Parents' entered in the text field.

Sample report:

Charter Parents						
						5/1/2020 5 matches found
Last Name	First Name	MI	ID	Address	Phone Number	Age Grade Homeroom
Adams	James	W		31 Orion Lake Circle	H:	50
Hill	Robert			330 E Island Road	H: (555) 444-7308	41
Hill	Wayne			358 Scuppernong Drive	H: 430-2300	
Murphy	Joseph	E		4293 Molino Bridge Road	H: (555) 435-4911	31
Wilson	David	D		4470 Molino Bridge Road	H: (555) 440-1081	53

State

Retrieves those residents living in the same state. Data is derived from the Resident Address information.

1. Select the **State** from the drop-down list. The list will default to the state where the district is located.

A screenshot of the 'STATE' section in a search criteria form. It features a red 'X' icon, the label 'State', and a dropdown menu currently showing 'NY'.

Zip

Retrieves those residents living within the same zip-code area. Data is derived from the Resident Address information.

1. Enter the **Zip** (or postal) code in the free-text entry field. This field will accept letters and numbers.

A screenshot of a search interface. At the top left is a small 'zip' icon. Below it is a red 'X' icon. To the right of the 'X' is the label 'Zip' followed by a text input field. The input field is currently empty.

Example: Search for residents who live in the 90210 zip code:

A screenshot of a search interface. At the top left is a small 'zip' icon. Below it is a red 'X' icon. To the right of the 'X' is the label 'Zip' followed by a text input field. The input field contains the text '90210'.

Example 2: Search for residents whose zip code starts with "145":

A screenshot of a search interface. At the top left is a small 'zip' icon. Below it is a red 'X' icon. To the right of the 'X' is the label 'Zip' followed by a text input field. The input field contains the text '145*'.

Common Term Combinations

This section is meant only as a guide to provide users with some examples of how to combine terms to find students and residents.

Search criteria can be used and combined in countless ways in addition to what is listed here.

Find all currently enrolled students living in the district and in the 9th grade:

1. Add District term:
 - A. Lives in District = use the default or select the district name from the drop-down list
 - B. Ignore Enrollment radio button
2. Add Enrollment term:
 - A. Building = high school building name or ALL
 - B. School Level = high school (select from the drop-down list)
 - C. Grade = 9 (select from the drop-down list)
 - D. In District radio button
 - E. Search

Find all students whose father has sole custody:

1. Add Custody Alert term: Custody = Sole (select from the drop-down list)
2. Add Contact term: Contact = Father
3. Search

Find all high school boys who received discipline referrals for fighting in the month of November:

1. Add Enrollment term:
 - A. Building = high school building name or ALL
 - B. School Level = high school (select from the drop-down list)
 - C. Grade = ALL (leave the default)
 - D. In District radio button
2. Add Discipline term:
 - A. Offense = Fighting (select from the drop-down list)
 - B. From = 11/1/2004 (type the date or use the pop-up calendar)
 - C. To = 11/30/2004 (type the date or use the pop-up calendar)
3. Search

Find all students currently attending private school providers whose primary residence is in the district:

1. Add District term:
 - A. Lives in District = use the default or select the district name from the drop-down list
 - B. Not Currently Enrolled in [district name] radio button
2. Add Enrollment term:
 - A. Building = ALL
 - B. School Level = ALL
 - C. Grade = ALL
 - D. Out of District radio button
 - E. District = ALL
 - F. Private radio button
3. Search

Find all students who are 4 years old who live in the district and who thus might attend district schools in the coming school year:

1. Add Projected Enrollment term:
 - A. Building = ALL
 - B. School Level = Elementary
 - C. Grade = ALL
 - D. School Year = 2007/2008 (select the relevant year from the drop-down list)
 - E. Projected to enroll from = use start date of next school year (typically 7/1/07 or 9/1/07)
 - F. To = use the end date of the next school year (typically 6/30/08 or 8/31/08)
2. Add Date of Birth term:
 - A. From = 1/1/2003 (type the date or use the pop-up calendar)
 - B. T = 12/1/2003 (type the date or use the pop-up calendar)

Note: Use the district-designated birth date range that finds eligible 4 year olds; for example, all children born in 2003.

3. Search

Glossary of Terms

Address – refers to the building number and street name found in a person's Address tab Residence information. This term will also match on the building number and street name of the Residence Addresses of a person's contacts from their Contacts tab. Users can search either the number or the name, or both. Found in both the Student and Resident tabs.

Attendance – refers to attendance records logged for students. Allows students to be retrieved based on the number of absences, late arrivals or early dismissals found in their attendance records, as well as absence reason. Found only in the Student tab.

Batch Selector – the advanced search area allowing users to retrieve a person or a group of people based on selected criteria. The batch selector is a screen with a Search By drop-down of criteria terms which can be used individually or in combination to find a student or students, or a resident or residents.

City – refers to the name of the city found in a person's Address tab Residence information. Found only in the Resident tab.

Class Of – refers to the year of graduation found in a student's enrollment program service record. Found only in the Student tab.

Competency – refers to a requirement of graduation as defined by the district. Competencies are set up in the Counseling module, Competency sub-module, and are typically tied to a Cohort year. They contain an assessment or assessments which students must take to meet the requirement. Allows you to retrieve students who have or have not met the competency. Found only in the Student tab.

Contacts – refers to all types of contact relationships, such as mother, father, emergency contact, foster parent, etc. Found only in the Student tab.

County – refers to the name of the county found in a person's Address tab Residence information. Found only in the Resident tab.

Custody – refers to the custody type (such as joint, sole, 50/50, etc.) listed on a student's Contacts tab. Only retrieves students who have a custody type tied to a contact; there is no way to find students who have no custody type listed. Found in both the Student and Residents information.

Date of Birth – refers to the date of birth of the student based on the date entered into the person's information record in the Census module. Found only in the Student tab.

Discipline – refers to district-defined offenses that a student committed on a specific day or during a specific date range. Discipline information comes from a student's discipline referral records. Found only in the Student tab.

District – refers to both where the student actually resides in combination with where they attend school. Found in both the Student and Resident tabs.

Enrollment – refers to the school building, level and grade a student is enrolled in, in combination with whether they are enrolled within the district or out of the district (also known as the Grade term). Found in both the Student and Resident tabs.

Ethnicity – refers to students with pre-defined ethnicity types allowing users to find those students enrolled into the district. Found in the Demographics tab.

From File – refers the term found in the Batch Selector that allows a user to use an external text file to locate all students that match ID numbers stored in the file. Only found in the Student tab of the Batch Selector.

Gender – refers to the gender of the person based on the value entered into the person's information record in the Census module. Can be male or female. Found only in the Student tab.

Homeroom – refers to the homeroom number entered on the student's enrollment program service record. Found only in the Student tab.

Honor Roll – refers to whether the student's average for a selected marking period has met the threshold for each type of district-defined honor or merit roll. Found only in the Student tab.

Immigration – refers to the last country of residence as logged in a person's Demographics tab in their information record in the Census module. Found in both the Student and Resident tabs.

Immunizations – refers to immunization and vaccination records found in a student's Medical History tab. See also Vaccination. Found only in the Student tab.\

Is Placed—refers to students who are placed in your district, out of district, or a BOCES provider. Found in the Student tab.

Language – refers to the language spoken by the student. Each student will have a 1st Language, which is required for enrollment. Census records can also capture a 2nd language. An example of when both might be used would be for an immigrant whose native language is Spanish, who uses English in school as a second language. Found only in the Student tab.

Last Modified Program Services – refers to the date when the student’s Program Services information in the Student tab was last updated. Found only in the Student tab.

Last Name – refers to the last name of the person as listed in the information record in Census. Found in both the Student and Resident tabs.

Master Schedule/Course Selection – refers to the student’s scheduled or selected courses for the designated school year. Allows a student to be retrieved based on enrollment in or a selection of a course or section of a course for a specific school year. Found only in the Student tab.

Medical Visits – refers to scheduled and unscheduled visits history logged in a student’s Medical Visits tab. Found only in the Student tab.

Order of Protection – refers to an order of protection note found in a student’s Notes tab in the Census module. Orders of protection are typically generated by a court and kept on file at the school level’s main office. Found only in the Student tab.

Physicals – refers to results from physical fitness exams logged in a student’s Medical History tab. Found only in the Student tab.

Program Services – refers to any program service listed in a student’s Student tab in the Census module. Program services include disability information, enrollment information, funding information, etc. Found only in the Student tab.

Projected Enrollment – refers to information found in a student’s Projected Enrollment program service record in the Student tab. Found only in the Student tab.

Query(ies) – one or more batch terms used singly or in combination, to retrieve a person or people in the batch selector. See also **search criteria**, **search query** and/or **search string**.

Random – check box option found in the batch selector which allows the user to retrieve only a random sample of the total search results. Can be specified as a number or a percentage of the total results.

Report Name – term used to add a custom report title to a Census Report. This term only works with the Census Report, Batch Selector Student tab.

Saved Results – a group of students found using the batch selector, who have been saved as a group. The group is typically saved with a descriptive name. The group can be used in the batch selector alone or in combination with other terms.

Search Criteria – one or more batch terms, used singly or in combination, to retrieve a person or people in the batch selector. See also **search query**, **search string** and/or **query**.

Search Query – one or more batch terms used to retrieve a person or people in the batch selector. See also **search criteria**, **search string** and/or **query**.

Search String – a series of search criteria, or combination of terms, used to retrieve a person or people in the batch selector. See also **search criteria**, **search query** and/or **query**.

Screening – refers to scoliosis, vision and hearing screenings found in the Screening tab of a student's Medical History. Found only in the Student tab.

Special Education – refers to the Special Education check box found in a student's Enrollment program service record in the Student tab. Only students with this check box selected can be found. Found only in the Student tab.

State – refers to the name of the state found in a person's Address tab Residence information. Found only in the Resident tab.

Tabs – organizational feature used throughout the application which allows different information to be easily grouped and retrieved. The tab card interface functions like a rolodex: when the user selects a tab, the screen refreshes to reveal only the information on that tab. Tabs allow more information to be contained and displayed at-a-glance, without making the user scroll down through a long list of information fields. The Batch Selector has two tabs: Student tab and Resident tab. Resident is found only when searching for specific census reports.

Team – refers to a grouping of students set up in the Scheduling module. Teams are used to group students for homerooms, class schedules, events, etc. Found only in the Student tab.

Term(s) – actual words selected from the Search by drop-down list. Terms are combined to make search queries.

Transportation – refers to the way a student gets to school and gets home from school. Based on a set transportation schedule listing whether a student takes a district school bus or has an alternative method of transportation, and allows a student to be found based on the method of transportation used, the place coming from or going to, and the day(s) of the week. Found only in the Student tab.

Un-enrollment Reason – refers to the reason a student enrollment record was ended, as listed in a closed Enrollment record. Examples might be Graduated, Transferred, etc. Found only in the Student tab.

Vaccinations – refers to immunization and vaccination records found in a student's Medical History tab. See also Immunization.

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