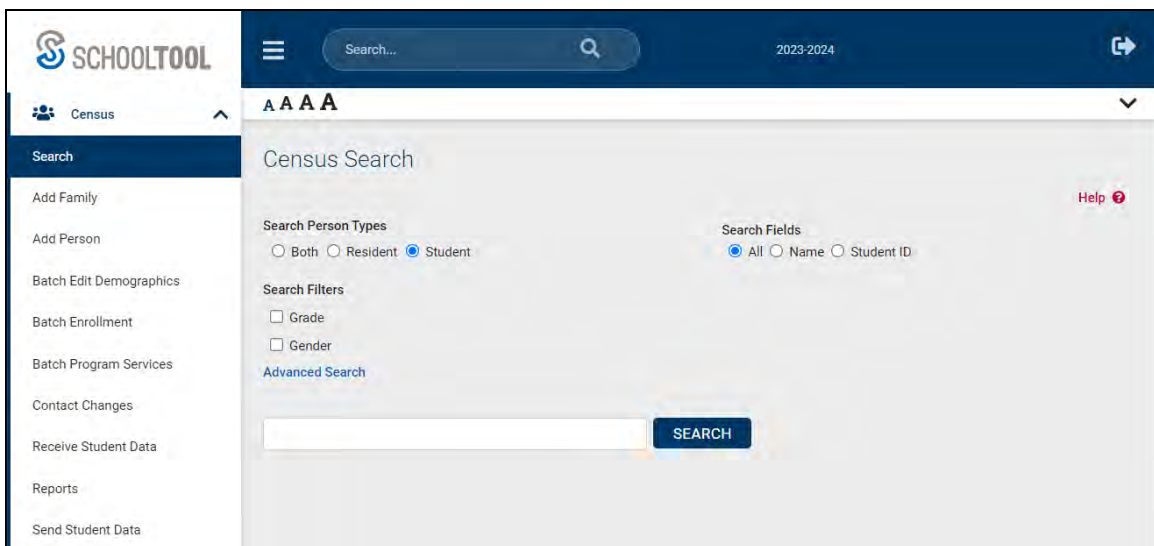


Census Module

User Guide

Version 23.2



The screenshot displays the SchoolTool web application interface for the Census Search module. The top navigation bar is dark blue with the SchoolTool logo on the left, a search bar in the center, and the school year '2023-2024' on the right. A left sidebar contains a 'Census' menu item with a dropdown arrow, and a 'Search' section with a list of options: 'Add Family', 'Add Person', 'Batch Edit Demographics', 'Batch Enrollment', 'Batch Program Services', 'Contact Changes', 'Receive Student Data', 'Reports', and 'Send Student Data'. The main content area is titled 'Census Search' and includes a 'Help' icon. It features two sections: 'Search Person Types' with radio buttons for 'Both', 'Resident', and 'Student' (the 'Student' option is selected), and 'Search Fields' with radio buttons for 'All', 'Name', and 'Student ID' (the 'All' option is selected). Below these are 'Search Filters' for 'Grade' and 'Gender', both with unchecked checkboxes. A link for 'Advanced Search' is present. At the bottom of the main area is a large text input field and a blue 'SEARCH' button.

Table of Contents

Census Module Overview	6
Census Sub-modules	6
Census > Student Record	8
Personal Information Section	9
Email Addresses	13
Viewing RTI Records	14
Editing RTI Records	15
Accounts Tab	16
Contacts Tab	17
Adding a New Contact	19
Search for Existing Contacts	20
Add Personal Information	21
Editing Contacts	22
Define Relationships	24
Set Contact Details	26
Controlling Contact Rights	28
Defining Contact Call Order	31
Viewing Contact History	32
Addresses Tab	34
Adding a New Residence Address	35
Adding or Editing a Home Phone Number	42
Modifying/Editing an Existing Address	43
Adding a Mailing Address	44
Work Addresses	47
Adding a Work Address	47
Adding a Work Phone and/or Employer Name	49
Moving Out of a Work or Mailing Address	49
Moving Former Residents out to Unknown Addresses	50
Moving a Family to a New Address	53
Emancipating a Student	56
Viewing the Residence History	58
Addresses Tab – Frequently Asked Questions	59
Demographics Tab	60
Overriding a Cohort Value	61
Student Tab	63
Enrollment View	63
Adding a New Official Enrollment	64
Editing an Official Enrollment	69
Ending an Official Enrollment	70

Transferring Enrollments	73
Adding or Editing a Projected Enrollment	75
Creating New Providers	77
Managing Alternate Enrollments	80
Current Program Services View	81
General View	82
Student ID Numbers	82
Edit Special Education Information for a Student	84
Student Lockers	85
Referral View	85
Student Lite View	86
Program Services Views	88
Adding Program Service Records	88
Editing Program Service Records	89
Deleting Program Service Records	90
Home District View	90
Special Programs View	91
Letters Tab	92
User Defined Tab	94
Notes Tab	96
General Notes	98
Orders of Protection	100
Printing Student Notes	101
Transferring Student Data	101
Finding a SchoolTool District	104
Census > Census Search	107
Modifying a Person Record	107
Delete a Person (Student)	109
Census > Add Family	111
Adding an Entire Family	111
Census > Add Person	116
Add a New Person Record	116
Census > Batch Edit Demographics	120
Census > Batch Enrollment	122
Batch Enrollment Start	130
Batch Add Projected Enrollments	132
Batch Remove Projected Enrollment	134
Batch Add Alternate Enrollment	136
Batch Remove Alternate Enrollment	138

Reviewing the Job Object History	139
Census > Batch Program Services	142
Batch Add Program Services	142
Batch End Program Services	144
Batch Remove Program Services	146
Reviewing the Job Object History	148
Contact Changes	150
Census > Receive Student Data	152
Adding a Transferred Student	158
Receiving a Transferred Student	158
Adding an Online Pre-Registration Session	160
Receiving an Online Pre-Registration Session	165
External Registration	171
Import an External Registration File	174
Update Students	180
Census > Reports	185
BOCES Report	185
Mailing Label Reports	187
Mailing Label Samples	188
Census Report	190
Student Detail Report	191
Birthday Report	193
Alternative Report	194
Poll List Report	194
Household Report	195
Custody Type and Alert Report	196
Zip Code Aggregate Report	197
User Defined Report	198
Sample User Defined Reports	199
Student Modify Report	200
Ethnicity Report	201
Sample Ethnicity Reports	202
Cohort Report	203
Census Audit Report	204
Student Mobility Report	205
Student Lite Report	206
CRDC and BEDS Breakdown	207
Census > Send Student Data	210

Census Appendix – Program Services	216
AIS	216
Alternate Assessment Program	218
CIP	219
Disability	219
Exempt LEP/ELL	220
IEP	220
Funding	220
Level of Integration	221
LEP/ELL	221
Other	222
Section 504	222
Section 504 Safety Net	223
Special Programs	223
Test Modification	224
Index	226

Census Module Overview

The Census module is where designated school administrators will add and manage student, resident, and contact demographic and program service data.

The data in the Census module functions as the core of the SchoolTool application. Essentially, all records must be complete and accurate in order for schedules, reports, attendance, rosters, mailing labels, state exports, etc. to work correctly.

It is **critical** that users maintain the integrity of the data in this module. Fields should be used appropriately and should only contain data they are meant for, and records should be as complete as they possibly can.

Census Sub-modules

Search – This is the default sub-module that opens when you select the Census module. From this sub-module, you are able to search for any person (student or resident) in the database. You can also use the radio buttons or the Advanced Search link to further define your search.

Add Family – This area allows users to add a new family to the database. This sub-module provides a form that allows you to add an entire family (including up to two (2) adults, four (4) children, and a residence address). To avoid duplicates, this option should only be used if none of the family members are already in SchoolTool (such as when a new family moves to the district from another area). When the form is submitted, SchoolTool will perform a check to suggest any possible duplicates that may already exist in the database.

Add Person – This is where users will add new people (students, residents, and their contacts) into the database. The default Add Person screen is also a search window, forcing you to search by Last Name before adding anyone new, thus avoiding adding duplicates.

Batch Edit Demographics – This area allows users to modify Demographics information for groups of students in a single operation.

Batch Enrollment – This area allows users to change Enrollment Start Dates, add Projected Enrollments, remove Projected Enrollments, add Alternate Enrollments, and remove Alternate Enrollments for one or more students at a time.

Batch Program Services – This area allows users to batch add or remove program services, such as AIS, CIP, Disability, Funding, IEP, Level of Integration, Section 504, Test Modifications, etc.

Contact Changes – This area allows users to review and approve or deny contact information changes submitted by parents and other SchoolTool users.

Receive Student Data – This area allows districts to receive student data from other SchoolTool districts, online pre-registration sessions, and external vendors. After reviewing the incoming data, users can create records and import data into SchoolTool. Three lists of students will be displayed: one for Transfer Students, one for Online Pre-Registration, and one for External Registration (depending on your permissions, you may see only one or two sets of students to receive).

Reports – This area allows users to generate reports and view student information in various formats. For example, in this list of reports, you will find mailing labels, household reports, census reports, alternative reports, the ethnicity report, and the cohort reports. If your district has requested any customized census reports, they will also appear here, under User Defined Reports.

Send Student Data – This area allows users to prepare groups of students for transfer to another SchoolTool district and transmit them in batches. After adding students to the list, users can enter additional information requested by the receiving district, which may include course selections and/or user defined screen data. Once students are ready to be transmitted, users will select the students to send and then transmit them in a single operation.

Census > Student Record

When you Select ➤ a student from a list, you will see that student's Personal Information Record, also known simply as the Student Record.

Most SchoolTool users deal with student records most often, but every individual in SchoolTool has his/her own Person Record where all information related to that person is stored. This document will focus on working with a Student Information Record, as these typically contain the most detail.

The Student Record contains all information about a student. There are 2 main parts to the Student Record: the Personal Information section and the Student Information section. When using certain modules, additional sections may appear at the bottom of the record with module-specific information. This information is available based on user permissions and the module you are using; therefore not all users will have access to every tab in the Student Information section(s).

Use the Show/Hide buttons ↓↑ to collapse sections of the student's record that you do not wish to see. This will result in less scrolling needed to view the student's record.

If you are viewing the results of a student search, you can use the following options:

1. Click the Next and Previous buttons ➡➡ to move forward and backward between students in your search results.
2. Click the Cancel Search ⛔ button to cancel the current search and remain on the current student.
3. Click the ⬅ Back button to return to the previous screen.

The screenshot shows the 'Personal Information' section of a student record for Patrick Turner. At the top, there are navigation buttons: 'View search', 'Cancel search', and 'Previous/Next'. Below these is a horizontal menu with tabs: 'MY HOME', 'CENSUS', 'SCHEDULING', 'MEDICAL', 'DISCIPLINE', 'ATTENDANCE', 'COUNSELING', and 'TRANSPORTATION'. The 'CENSUS' tab is selected. The student's name 'Turner, Patrick' is displayed with a small photo and a student ID '27059'. The record is organized into two columns of information. The left column includes: First Name (Patrick), Middle (M), Last Name (Turner), Gender (Male), DOB (10/8/2004, 17 yr 3 mo), 1st Language (English), and Email (student@mdx.com). The right column includes: Address (1682 Hawthorne St, Rochester, NY 90210), Grade (12), Class of (2021-2022), Cohort (2018-2019), Homeroom (206), Locker (3138), Counselor (Roberts, Angela), Type (0011-Regular School Year Enrollment), and Building (Mindex HS/High School). At the bottom left, there is a creation/modification log: 'Created by Patricia Jones on 5/11/2009 at 4:48 PM' and 'Modified by Morgan Martin on 1/14/2022 at 8:47 AM'.

Personal Information	
View search Cancel search Previous/Next MY HOME CENSUS SCHEDULING MEDICAL DISCIPLINE ATTENDANCE COUNSELING TRANSPORTATION	
Turner, Patrick 27059	
First: Patrick Middle: M Last: Turner Gender: Male DOB: 10/8/2004 (17 yr 3 mo) 1st Language: English Email: student@mdx.com	Address: 1682 Hawthorne St. Rochester, NY 90210 Grade: 12 Class of: 2021-2022 Cohort: 2018-2019 Homeroom: 206 Locker: 3138 Counselor: Roberts, Angela Type: 0011-Regular School Year Enrollment Building: Mindex HS/High School
Created by Patricia Jones on 5/11/2009 at 4:48 PM Modified by Morgan Martin on 1/14/2022 at 8:47 AM	

Personal Information Section

The Personal Information section at the top of the student record contains a summary of the student's information. This information includes the student's name, gender, age, primary language, and contact information. It also shows the student's grade, homeroom, homeroom teacher (with an email link), locker number (with an icon  that shows the locker combination in a mouse-over), counselor (with an email link), enrollment type, building/school level, and home district (if applicable). The student locator text in the bottom left corner of this section shows the current location of that student, based on the student's schedule and attendance data. If the student has any alerts, those icons will display for users with the appropriate permissions.

Personal Information

View search

Cancel search

Previous/Next

MY HOME

CENSUS

SCHEDULING

MEDICAL

DISCIPLINE

ATTENDANCE

COUNSELING

TRANSPORTATION

Allen, James

48074

First: James (Jimmy (He/His))

Middle: A

Last: Allen

Gender: Male

DOB: 11/5/2006 (15 yr 11 mo)

1st Language: English

Email: J.Allen@yoohoo.com

Address: 12 E Island Road
Rochester, NY 12345

Phones: H: (555) 531-6786

Grade: 10

Class of: 2023-2024

Cohort: 2020-2021

Homeroom: 163

Locker: 3058

Counselor: Williams, Melissa

Type: 0011-Regular School Year Enrollment

Building: Mindex HS/High School

Cycle day B, Period 4 (12:48PM to 11:59PM)

EARTH SCIENCE R in Room 180 Teacher: Richardson/Campbell

Created by Heather Anderson on 2/24/2020 at 2:25 PM

Modified by Morgan Martin on 5/20/2022 at 9:09 AM

Note: The specific information available here is based on Maintenance settings; not all users will see all fields/data.

There are several types of alerts that may be visible on a teacher's class roster and also on individual students' Personal Information Records. In addition, the alert icons may provide more information on the specific alert, which displays in a text box that appears when the user holds the mouse over an alert icon.

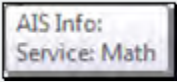
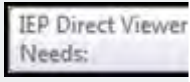
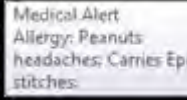
Available alerts include the following icons and corresponding mouse-over text:

AIS Program Service	IEP Viewer	Medical Alerts	Custom Alerts	Send Notification
Icon: 	Icon: 	Icon: 	Icon: 	Icon: 
Mouse-over	Mouse-over	Mouse-over	Note: Custom	Clicking this

Census Module User Guide
SchoolTool Version 23.2

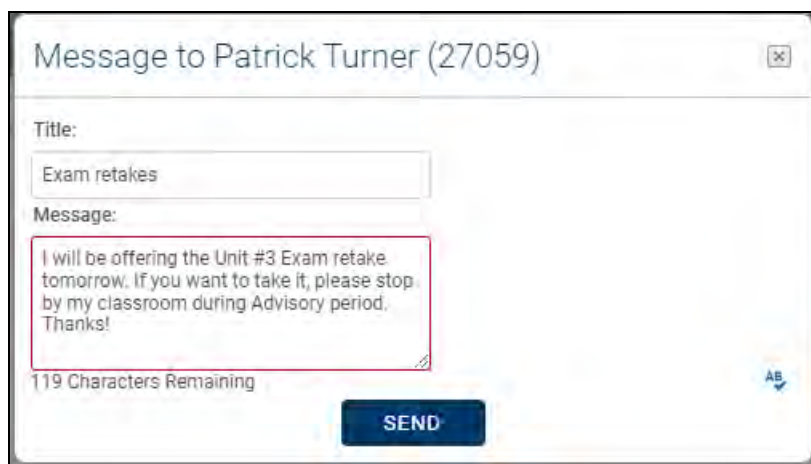
© 2026 Mindex

Page 9 of 231
Modified 3/31/2026

text: 	Text: 	text: 	Alerts are indicated by a flag or other image and may be any color defined by the district. The mouse-over text will display the name of the custom alert as defined in Maintenance.	icon opens a pop-up where users can enter a message to send to this student via direct notification in the SchoolTool mobile app
Student RTI Information Icon: 	View Shared District Data Icon: 	Student Dashboard Viewer Icon: 	WebEdge Student Portfolio Viewer Icon: 	MTSS Summary Report Viewer Icon: 
Hovering the mouse over this icon will display a list of that student's active RTI records.	Clicking this icon opens a window to display student data shared by another district. This icon appears only when districts have configured data sharing.	Clicking this icon opens a window to display the Student View dashboard for that student.	Clicking this icon opens a window to display the WebEdge Student Portfolio for that student.	Clicking this icon opens a window to display the MTSS Summary Report for that student.

The visibility of these alerts is controlled by district permission settings. Users may be able to see the alert icon only, the mouse-over text description only, both, or none of these, depending on their user permissions. Separate permissions also control whether users may see these icons on a teacher's Roster.

The Send Notification  button appears for students who have opted to receive direct notifications in the SchoolTool mobile app (this also requires that the district has configured that building school level to allow direct notifications). Click the Send Notification  button and enter a title and message to send to the student, then click Send. The message will be delivered as a notification on the student's mobile device.



Users with permission to view students' SchoolTool Premier dashboards may see a SchoolTool Dashboard Viewer  icon for students who have a Student ID and have ever had an in-district enrollment. If this icon appears, users can click on the Viewer icon to view that student's dashboard in a new window.

If shared data is available from another SchoolTool district, a View District Data  icon may appear on in the alerts area. This will allow the user to view data from another district that has been configured for district-to-district data sharing (most likely between a BOCES and home district). To view shared data (or shared report cards and/or transcripts), hover over the District Data  icon and Select  the desired option (View District Data, View District Report Card, or View District Transcript) from the dropdown.



Users with the Mouseover Information permission can hover over the RTI  icon to see a list of the student's active RTI records.



If the user has View or Edit rights, corresponding buttons will be available for each record (either an Edit  icon, for users with Edit permissions, or a Select  icon, for users with View permissions).



Email Addresses

As more and more school districts use email as means of communication between contacts and students, SchoolTool makes it easy for you to keep track of all email addresses for both users.

1. Locate the student or contact using the **Census Search** sub-module and click the Edit  icon in the top right corner of the student's personal information to edit their information.

Person

MY HOME **CENSUS** SCHEDULING MEDICAL DISCIPLINE ATTENDANCE COUNSELING TRANSPORTATION

Turner, Patrick 27059

First: Patrick
Middle: M
Last: Turner
Gender: Male
DOB: 10/8/2004 (18 yr 0 mo)
1st Language: English
Email: student@mdx.com

Mailing: 287 Antique Lane
Rochester, NY 12345

Grade: 12
Class of: 2021-2022
Cohort: 2018-2019
Homeroom: 206
Locker: 3138
Counselor: Roberts, Angela
Type: 0011-Regular School Year Enrollment
Building: Mindex HS/High School

Cycle day G, Periods 3 to 4 (10:30AM to 11:59PM)
12:1:1 in Room Teacher:
Created by Patricia Jones on 5/11/2009 at 4:48 PM
Modified by Katie Copeland on 10/7/2022 at 12:10 PM

2. Once the screen refreshes, locate the Email entry field and enter in the new email address for this student or contact.

Note: Once you start entering information into this field, it will turn YELLOW, and once you have entered in a valid email address, it will turn GREEN, indicating that it is a proper email address.

3. Click once on the Save  icon in the top right corner to save any changes made to this student or contacts record.
4. The updated email address will be displayed in the top portion of the personal information record.

Viewing RTI Records

Users with View rights only will see Select  icons for each record in the list.

Select a record to view details in read-only mode. Click the Back  button to return to the student record. Click the RTI Detail Report  icon to print the RTI record and its associated intervention details.

Lowell, Patricia (36078) 🖨️ ← Back Help ?

Start: 1/20/2022 End:

Level: Tier I

Type:

Timeline:

Faculty: Martin, Kathleen

Description:

Date	Faculty	Intervention	Effect Type	Description
2/7/2022	Copeland, Katie			This is a description.

Editing RTI Records

Users with Edit rights can click the Edit  button for any of the RTI records listed.

Click the Edit  icon for any record to open it in edit mode. Make changes as needed and click Save  to return to the student record. Please note that any number of interventions may be edited or added, but the top section of the RTI record cannot be changed from this screen. Click the RTI Detail Report  icon to print the RTI record and its associated intervention details.

Young, Patricia (36078) 🖨️ Save Cancel Help ?

Start: 1/20/2022 End:

Level: Tier I

Type:

Timeline:

Faculty: Martin, Kathleen

Description:

+ Add

Date	Faculty	Intervention	Effect Type	Description
 	2/7/2022	Copeland, Katie		

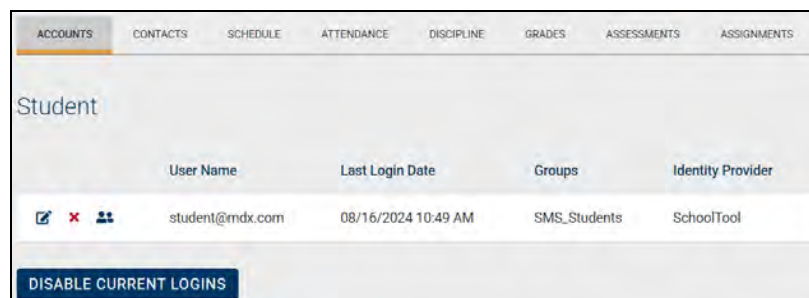
Accounts Tab

The Accounts tab shows any existing user accounts assigned to that individual, the last login date, all groups to which the account has been assigned, and the identity provider for the account. From this tab, users with the appropriate permission(s) may edit, delete, or unlock existing local accounts. Users may also create new local accounts and assign those accounts to a local user group.

Note: If the account has been locked due to multiple failed login attempts, a lock icon will be displayed indicating that the account is locked. This lock icon will continue to display until the next time the user successfully logs in after the lock timeout has passed.

Depending on permissions, users may also be able to assume the account of that individual by clicking on the Assume Account  button. When a user assumes a person's account, all permissions and building rights will reflect those of the person whose account is being assumed. To return to the original user account, simply log out of SchoolTool.

Note: If the Grading Application is accessed after assuming an account, an indicator in the top right will show. When hovered on, the message will say "Assuming the account of <user>".



User Name	Last Login Date	Groups	Identity Provider
   student@mdx.com	08/16/2024 10:49 AM	SMS_Students	SchoolTool

DISABLE CURRENT LOGINS

When an email address is modified for any individual, an Add  button will appear to allow the user to create a new local user account for that person. If the person already has a local account created using a different email address, the user will need to add a new account or update the existing account in order to use the updated email address for local logins.

Click on the Edit  button to access the account maintenance area for that user. From this screen, users can reset passwords, delete accounts, and/or modify group assignments.

Users will only be able to modify group assignments that have the "Show in Home," "Show in Census" or "Show in Faculty" option enabled in **Maintenance > User/Group >**

Local Account Maintenance > Manage Groups. The group checkboxes will be disabled for any groups that do not have this option checked.

ACCOUNTS CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS NOTES

Student [← Back](#)

User name: student@mdx.com

> Generate new password ☐ Automatically send email to user for password changes

> Set password to

> Delete account

☒ Save Save group assignments

☐ SMS Administrators

☐ SMS Parents

☒ SMS Students

☐ SMS Teachers

The “Disable Current Logins” button on the Accounts tab may be used to prevent a user from logging into SchoolTool without having to make changes to network securities. Clicking the “Disable Current Logins” button will immediately remove all account associations that have been made for this person. A confirmation message will appear asking you to confirm the operation; click OK to continue. The person can be re-associated with an account at any time from within the Maintenance module.

ACCOUNTS CONTACTS SCHEDULE ATTENDANCE DISCIPLINE GRADES ASSESSMENTS ASSIGNMENTS NOTES

Student

User Name	Last Login Date	Groups
student@mdx.com	01/25/2022 04:02 PM	SMS_Students

DISABLE CURRENT LOGINS

If no associations exist for a person, this button will not display when editing the Personal Information section. Any time an association is disabled, an audit entry is created in SchoolTool.

Contacts Tab

SchoolTool defines a contact as anyone who has an adult relationship to the student. This could be a parent, an emergency contact, a legal guardian, a relative, an older sibling etc. Each student will have one primary guardian, who they live with, as well as one or more secondary guardians. All guardians can be set up to receive mailings (report cards, discipline letters, etc.) about the student, and can be designated as able to pick the student up from school. In addition, custody information can be logged here.

Use the **Contacts** tab to add and define these adult relationships, as well as define the Contact Order and a Call Order for each student.

Note: You will NOT define sibling relationships here, unless the student is in the custody of an older sibling, who functions as the legal guardian.

Note: You do not have to define contacts for this student. If they are older, and live alone, or with friends, you may “emancipate” them and move them into their own residence, without listing an adult guardian in the **Contacts** tab. This should be done using the Addresses tab

If any contacts exist for this student, they will appear in a list in the Contacts tab. Otherwise, you will see a message stating “No contacts.”

ACCOUNTS	ADDRESSES	CONTACTS	DEMOGRAPHICS	STUDENT	LETTERS	USER DEFINED	NOTES
Details							
Contacts							
✕ > Dawn Richardson DRichard@mcsd.erg 7 Deer Creek Lane Rochester, NY 12345							
Mother Cell: (555) 431-3963 Unl Home: (555) 492-8673 Text: (555) 432-3479 x0012							
✕ > Matthew Carter MCarter@yooahoo.com 7 Deer Creek Lane Rochester, NY 12345							
Father Home: (555) 492-8673 Cell: (555) 431-3965 Unl Work: (555) 431-5251 x1784 Text: (555) 432-8157 x4690							
✕ > Andrew Moore No address available							
Emergency Contact Cell: (555) 433-6335 Unl							
Siblings							
> Harry Carter 1/4/2004 (18 yr 6 mo) Mindex HS/12							
> Charlie Carter 4/1/2005 (17 yr 3 mo) Mindex HS/11							
> Theresa Carter 9/30/2016 (5 yr 9 mo) Mindex ES3/K							

From the Contacts tab, you may perform the following options:

- Add a New Contact  (locate an existing person or add a new person and then designate them as a contact)
- Edit an Existing Contact  (define relationships and contact order, set custody alerts, designate primary contacts, etc.)
- View and Edit Contact History  (view previous contacts, start and end dates for relationships, etc.)
- View/Edit Contact Call Order  (these options are available only for students who have adult contacts).

- View/Edit the Student Display Name (affirmed or legal name) that should be shown to each contact.

Adding a New Contact

To add a new contact, you must first search to find out whether or not the contact already exists in SchoolTool.

Click once on the green Add **+** button in the upper right corner of the Contacts tab. The screen will refresh with the Add Contact search screen so you can search first to see if the contact is in the database.

ACCOUNTS ADDRESSES **CONTACTS** DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Add Contact Cancel Help

Search for the person you want to set up a relationship with. If you cannot find the person you are looking for, click "Create adult or guardian contact" or "Create child contact". [Advanced Search](#)

SEARCH

If the person already exists, you may select that person and modify the contact's relationship or other contact details.

ACCOUNTS ADDRESSES **CONTACTS** DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Add Contact Cancel Help

Search for the person you want to set up a relationship with. If you cannot find the person you are looking for, click "Create adult or guardian contact" or "Create child contact". [Advanced Search](#)

SEARCH

4 matches found

CREATE ADULT OR GUARDIAN CONTACT **CREATE CHILD CONTACT**

	First Name	MI	Last Name	Address	Phone	ID	Age	Grade	Homeroom
>	Anne		Bell	28 Brentwood Blvd	H: (555) 432-2250				
>	Anne		Campbell	3428 Brooklyn Road	H: (555) 538-0854				
>	Anne		Campbell						
>	Joanne	A	Campbell	3428 Brooklyn Road	H: (555) 538-0854	51620	4	PK am	211

If the person does *not* exist, click the appropriate Add Adult Contact or Add Child Contact button and refer to the [Census > Add Person](#) documentation for additional information.

ACCOUNTS ADDRESSES **CONTACTS** DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Add Contact Cancel Help

Search for the person you want to set up a relationship with. If you cannot find the person you are looking for, click 'Create adult or guardian contact' or 'Create child contact'. [Advanced Search](#)

Anne Bell SEARCH

4 matches found.

CREATE ADULT OR GUARDIAN CONTACT CREATE CHILD CONTACT

	First Name	MI	Last Name	Address	Phone	ID	Age	Grade	Homeroom
>	Anne		Bell	28 Brentwood Blvd	H: (555) 432-2250				
>	Anne		Campbell	3428 Brooklyn Road	H: (555) 538-0854				
>	Anne		Campbell						
>	Joanne	A	Campbell	3428 Brooklyn Road	H: (555) 538-0854	51620	4	PK am	211

Search for Existing Contacts

1. To add a new contact, you must search first to see if the contact is in the data-base.

ACCOUNTS ADDRESSES **CONTACTS** DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Add Contact Cancel Help

Search for the person you want to set up a relationship with. If you cannot find the person you are looking for, click 'Create adult or guardian contact' or 'Create child contact'. [Advanced Search](#)

SEARCH

2. Enter the name of the adult contact.

Note: Make sure to spell all names correctly! This will ensure that you are not adding the same person twice to the database.

Note: Names with apostrophes or hyphens such as "Barton-Smith" or "O'Connor" must be typed in part (i.e. Barton or Connor) or exactly as written.

3. Click once on the Search button.
 - A. If a match (or matches) is found, it will appear in a row below.

Note: If multiple matches display, use the column headings to sort the list and find the person you are looking for.

Note: SchoolTool includes a feature which allows you to add contacts from within the person record, in the event that you do not find the contact person you are looking for. If no match is found, continue to the next step. If a match is found, select the appropriate person from

the list and skip ahead to [Editing Contacts](#) to define the relationship and other contact details.

First Name	MI	Last Name	Address	Phone	ID	Age	Grade	Homeroom
Anne		Bell	28 Brentwood Blvd	H: (555) 432-2250				
Anne		Campbell	3428 Brooklyn Road	H: (555) 538-0854				
Anne		Campbell						
Joanne	A	Campbell	3428 Brooklyn Road	H: (555) 538-0854	51620	4	PK am	211

Add Personal Information

1. If a match is not found, click the Create adult or guardian contact button. The screen will refresh with entry fields for the new person record.

Affirmed Name

First Name:

Middle Name:

Last Name:

Legal Name

☒ Same as Affirmed Name

First Name:

Middle Name:

Last Name:

Additional Details

Salutation:

Nickname:

Gender:

Assigned Sex at Birth:

Preferred Pronoun:

DOB:

1st Language:

Email:

Universal Contact ID:

- A. Enter the first and last names, including a salutation if you have those details.

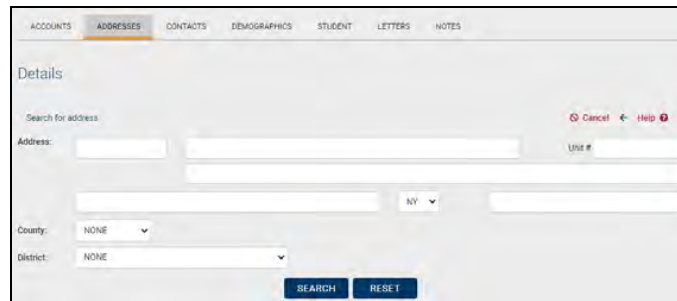
Note: Parents are not typically listed with a first language or Date of Birth (DOB); if you add these details it is possible to enroll this adult as

a student in error. Using a salutation is often the best way to distinguish an adult.

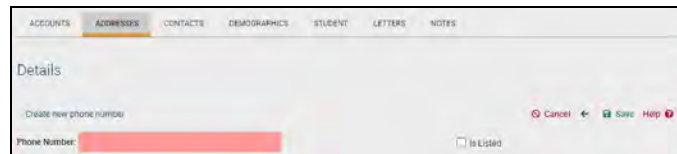
- B. Click the green Save  button in the upper right corner to save this contact record. The screen will refresh displaying the Addresses tab with a prompt for additional options:



2. Select  one of the following actions from the list:
- Enter the person's address and phone number to add this person's address and home phone number. Proceed with adding the address and phone number details as seen in the section on the Addresses tab.



- Enter the person's phone number only to add this person's phone number only (in the example of an emergency contact, whose home address might not be known.) Enter the phone Number, check the Is Listed check box, if appropriate, and then click Save .



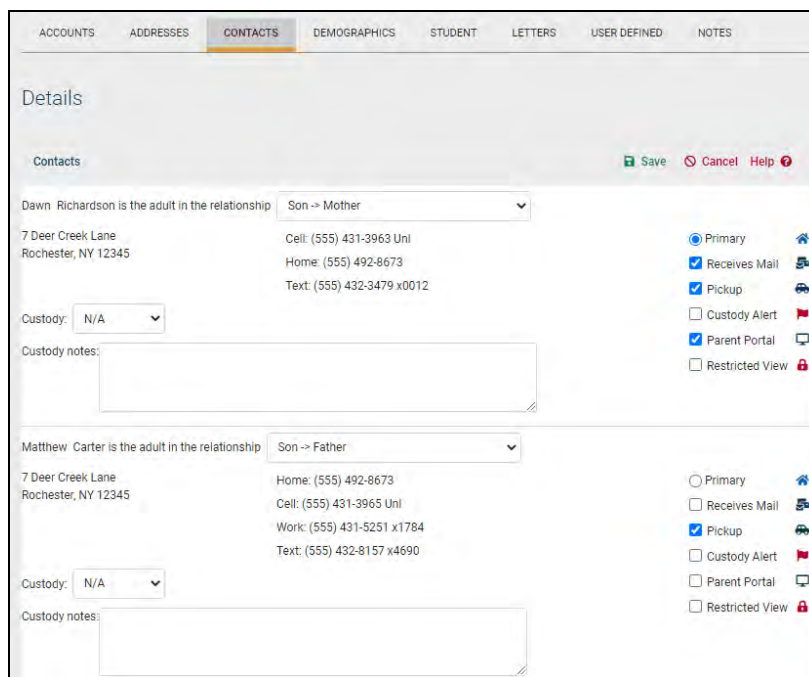
- Neither the address or phone number to add this person without any home phone or address information. The screen will update returning you to the Contacts tab, where you can define the relationship between this contact and the student.
3. Once you have returned to the Contacts tab, you will then be able to edit the Contact details, including defining the relationship and other information.

Editing Contacts

Editing contacts allows you to define relationships, set primary contacts, set contact details and rights, and define custody situations.

Note: To tie a contact to a student, you *must* define their relationship.

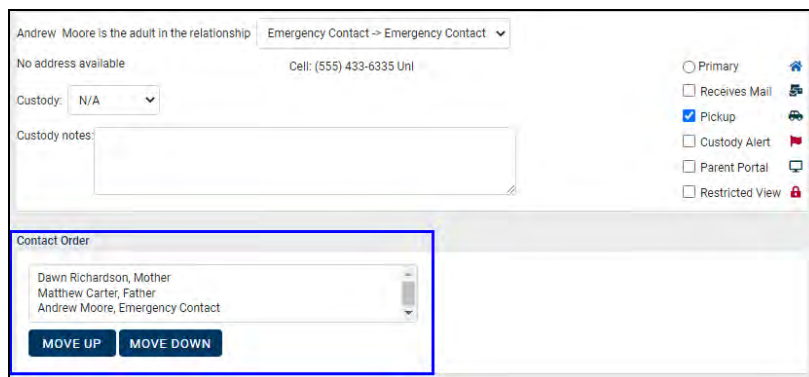
To edit an existing contact, navigate to the person's **Census > Contacts** tab. Click the Edit  button to modify a contact. The Contacts tab will open in edit mode, where you can then modify the contact's relationship or other details.



The screenshot shows the 'Contacts' tab in edit mode. At the top, there are tabs for ACCOUNTS, ADDRESSES, CONTACTS (selected), DEMOGRAPHICS, STUDENT, LETTERS, USER DEFINED, and NOTES. Below the tabs is a 'Details' section. The first contact is Dawn Richardson, with the relationship 'Son -> Mother'. Her address is 7 Deer Creek Lane, Rochester, NY 12345. Her contact information includes Cell: (555) 431-3963 Unl, Home: (555) 492-8673, and Text: (555) 432-3479 x0012. Her custody is 'N/A'. The second contact is Matthew Carter, with the relationship 'Son -> Father'. His address is also 7 Deer Creek Lane, Rochester, NY 12345. His contact information includes Home: (555) 492-8673, Cell: (555) 431-3965 Unl, Work: (555) 431-5251 x1784, and Text: (555) 432-8157 x4690. His custody is 'N/A'. To the right of each contact's details are checkboxes for Primary, Receives Mail, Pickup, Custody Alert, Parent Portal, and Restricted View.

When adding a contact, you must edit the relationship, set contact details, and specify which other relationships should be created before the contact may be tied to the person.

To modify the order in which contacts are listed for that student, scroll to the Contact Order section and make changes as needed. This list includes all adult contacts of that student, in ascending order. Use the appropriate buttons to move contacts up or down within the list. Once the contacts have been reordered as desired, click the Save  button at the top of the Contacts tab to apply these changes.



The screenshot shows the 'Contact Order' section. It contains a list of contacts: Dawn Richardson, Mother; Matthew Carter, Father; and Andrew Moore, Emergency Contact. Below the list are two buttons: 'MOVE UP' and 'MOVE DOWN'. The 'Contact Order' section is highlighted with a blue box.

A list of similar siblings may appear with checkboxes to the right of the list allowing users to copy the contact order. A "similar sibling" is defined as a student who shares

the same exact adult contacts. To copy the contact order to one or more similar siblings, check the boxes as desired before saving.

Define Relationships

SchoolTool Census data is based on a student, not a family. You will build relationships between students and adult contacts, not between adult contacts or student siblings. In most cases, the following relationships are defined as “parental”: mother, father, stepmother, stepfather and parent. All others are designated as non-parent, including “other.” These definitions are also maintained by your district, and these parental types are used when generating progress reports and report cards.

1. Define the relationship between the initial student and adult and set contact details as appropriate.

Note: Make sure to read the statement to verify the relationship. The top half will help you check the relationship. In general, if you see a salutation, this is a parent. If you see a date of birth, this is a student. Adult contacts for a student can be: mother, father, stepfather, stepmother, aunts, uncles, emergency contacts, legal guardians, foster parents, group home coordinators, etc. The relationships are defined and maintained by your district.

- A. There is a statement “**Patrick Turner** (the child in our example) *is the Adult* (radio button) or *Child* (radio button) in the relationship (drop-down list).” Use the radio buttons and drop-down list to define the relationship:

- B. If you are adding an adult to a student’s record, select the Adult radio button (if the student is on top) and the appropriate relationship.
- C. If you are adding a student to an adult’s record, select the Child radio button (if the adult is on top) and the appropriate relationship.

- D. **Do not be concerned with the order** in the relationship statement (e.g., "Mother -> Son"). Simply select the relationship which represents the "role" of each person in the relationship.

Note: You cannot change who is the adult and who is the child once this has been saved. You can delete the relationship and start again if something needs to be changed.

Note: Each district has control over the relationships available in the drop-down list. If you do not see the one you need, contact your district's SchoolTool liaison.

Note: Each district has control over the relationships available in the drop-down list. If you do not see the one you need, contact your district's SchoolTool liaison.

2. If you are *adding* a contact, you may see additional sections below the initial relationship. These are used to specify other contact relationships.

Note: Be sure the relationship includes the correct selection for "Adult" or "Child" before proceeding, as this will determine the additional contact options shown below.

Details

Add Contact

Emergency Contact = Emergency Contact

Home: (555) 432-2250
Work: (555) 427-2952 v4435
Cell: (555) 429-4401 100

Primary
Receives Mail
Pickup
Custody Alert
Parent Portal
Restricted View

Select additional adults to add to Chris Carter

☐ Include Albert Bell
☐ Include Ruth Warren
☐ Include Linda Williams

Select additional children to add to ALL selected adults (does not alter existing relationships)

☐ Include Harry Carter	1/4/2004 (16 yr 8 mo)	Mindex HS/12
☐ Include Charlene Carter	4/1/2005 (17 yr 3 mo)	Mindex HS/11
☐ Include Theresa Carter	9/30/2016 (5 yr 9 mo)	Mindex ES3/K

3. The "Select additional adults" section displays all other adults who are connected to students in the adult contact's home. To add any of these adults as to the student, check the appropriate boxes.
- A. For each selected adult, the user will need to specify the relationship and define contact details. This area allows you to define whether or not this contact receives mail about this student, can pick up this student, has parent portal access to this student, and more. This also allows you to select which Display Name (affirmed or legal name) this

contact should see when accessing information about this student.

4. The “Select additional children” section displays all other students living in the student contact’s home.
 - A. To add all selected adult contact(s) to any of these students, check the appropriate boxes. These contacts will be added using the same relationship and contact rights specified for the initial adult and student relationship. (Any of the “additional adults” selected in the previous step will also be added to these students, using the same relationship(s) defined for the initial student.)

Select additional children to add to ALL selected adults. (does not alter existing relationships)		
☐ Include Harry Carter	1/4/2004 (18 yr 6 mo)	Mindex HSG/12
☐ Include Charlie Carter	4/1/2005 (17 yr 3 mo)	Mindex HSG/11
☐ Include Theresa Carter	9/30/2016 (5 yr 9 mo)	Mindex ESS/6

Note: Existing relationships will not be modified or overwritten. If a student is already tied to one or more of the adult contacts, the relationship will not be changed regardless of any selections made here.

5. When all contacts have been selected appropriately and the relationships have been defined, click the Save  button to apply these changes.

Set Contact Details

1. Set the Primary  guardian. This is typically the person that the student lives with. The Primary person’s name will appear in several Census reports, and their address will also become the student’s address.
 - A. At the top right, you will see a radio button that says Do not select a primary. This is the default, as you can only have ONE primary guardian per student.
 - B. If this adult is the student’s primary guardian, you will select the Primary radio button.

Note: If this person is an emergency contact, do not select the Primary radio button.

Note: You do not have to define a contact as Primary for this student. If they are older, and live alone, or with friends, you may “emancipate”

Note: Once a Primary guardian is set, that person will have a Primary  icon next to their name. This icon is information only, visually alerting the user that this person is the designated Primary.

- Note:** Once flags are set, this person will have icons next to their name for each option you have selected. These icons are information only, visually alerting the user of this contact's rights.

- | ACCOUNTS | ADDRESSES | CONTACTS | DEMOGRAPHICS | STUDENT | LETTERS | USER DEFINED | NOTES | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------------|--|--------------|---------|---------|--------------|-------|---|--------------|--|--------------|---|----------------|-----------------------|--------------|--|----------------|--|--------------|--|--|--|--|--|--|---|--|--|--|--|--|
| <h2>Details</h2> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> <div>Contacts</div> <div> </div> </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="0"> <tr> <td colspan="2"> <div>Dawn Richardson</div> <div> </div> <div> DRichard@mcsd.org
 7 Deer Creek Lane
 Rochester, NY 12345 </div> </td> <td colspan="6"> <div>Mother</div> <div> </div> <div> Cell: (555) 431-3963 Uni
 Home: (555) 492-8673
 Text: (555) 432-3479 x0012 </div> </td> </tr> <tr> <td colspan="2"> <div>Matthew Carter</div> <div> </div> <div> MCarter@yoohoo.com
 7 Deer Creek Lane
 Rochester, NY 12345 </div> </td> <td colspan="6"> <div>Father</div> <div> </div> <div> Home: (555) 492-8673
 Cell: (555) 431-3965 Uni
 Work: (555) 431-5251 x1784
 Text: (555) 432-8157 x4690 </div> </td> </tr> <tr> <td colspan="2"> <div>Andrew Moore</div> <div> </div> <div> No address available </div> </td> <td colspan="6"> <div>Emergency Contact</div> <div> </div> <div> Cell: (555) 433-6335 Uni </div> </td> </tr> </table> | | | | | | | | <div>Dawn Richardson</div> <div> </div> <div> DRichard@mcsd.org
 7 Deer Creek Lane
 Rochester, NY 12345 </div> | | <div>Mother</div> <div> </div> <div> Cell: (555) 431-3963 Uni
 Home: (555) 492-8673
 Text: (555) 432-3479 x0012 </div> | | | | | | <div>Matthew Carter</div> <div> </div> <div> MCarter@yoohoo.com
 7 Deer Creek Lane
 Rochester, NY 12345 </div> | | <div>Father</div> <div> </div> <div> Home: (555) 492-8673
 Cell: (555) 431-3965 Uni
 Work: (555) 431-5251 x1784
 Text: (555) 432-8157 x4690 </div> | | | | | | <div>Andrew Moore</div> <div> </div> <div> No address available </div> | | <div>Emergency Contact</div> <div> </div> <div> Cell: (555) 433-6335 Uni </div> | | | | | |
| <div>Dawn Richardson</div> <div> </div> <div> DRichard@mcsd.org
 7 Deer Creek Lane
 Rochester, NY 12345 </div> | | <div>Mother</div> <div> </div> <div> Cell: (555) 431-3963 Uni
 Home: (555) 492-8673
 Text: (555) 432-3479 x0012 </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Matthew Carter</div> <div> </div> <div> MCarter@yoohoo.com
 7 Deer Creek Lane
 Rochester, NY 12345 </div> | | <div>Father</div> <div> </div> <div> Home: (555) 492-8673
 Cell: (555) 431-3965 Uni
 Work: (555) 431-5251 x1784
 Text: (555) 432-8157 x4690 </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Andrew Moore</div> <div> </div> <div> No address available </div> | | <div>Emergency Contact</div> <div> </div> <div> Cell: (555) 433-6335 Uni </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Siblings</div> <table border="0"> <tr> <td>></td> <td>Harry Carter</td> <td>1/4/2004 (18 yr 6 mo)</td> <td>Mindex HS/12</td> </tr> <tr> <td>></td> <td>Charlie Carter</td> <td>4/1/2005 (17 yr 3 mo)</td> <td>Mindex HS/11</td> </tr> <tr> <td>></td> <td>Theresa Carter</td> <td>9/30/2016 (5 yr 9 mo)</td> <td>Mindex ES3/K</td> </tr> </table> | | | | | | | | > | Harry Carter | 1/4/2004 (18 yr 6 mo) | Mindex HS/12 | > | Charlie Carter | 4/1/2005 (17 yr 3 mo) | Mindex HS/11 | > | Theresa Carter | 9/30/2016 (5 yr 9 mo) | Mindex ES3/K | | | | | | | | | | | | |
| > | Harry Carter | 1/4/2004 (18 yr 6 mo) | Mindex HS/12 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| > | Charlie Carter | 4/1/2005 (17 yr 3 mo) | Mindex HS/11 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| > | Theresa Carter | 9/30/2016 (5 yr 9 mo) | Mindex ES3/K | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Note: If you selected the Custody Alert flag, the **Contacts** tab will display a red circle to indicate that there is a custody situation with one or more contacts for this student.



Note: Contact details, relationships, and/or rights may be Added , Removed , or Edited  at any time.

Controlling Contact Rights

SchoolTool allows districts the flexibility to decide what rights each contact has. Each contact right corresponds with an icon, which will appear on the Contacts tab in read-only mode when selected for that relationship. This includes the following options:

- **Primary** : This value is set when adding a contact, and is typically the person that the student lives with. The Primary person's name will appear in several Census reports, and their address will also become the student's address. If this is the primary relationship, the Primary icon will appear in read-only mode.
- **Receives Mail** : This option is used to determine whether or not this contact receives mail regarding the student in the relationship. The general assumption regarding who gets mail is that contacts flagged to receive mail will receive all mailings, unless users specify otherwise when generating reports. Contacts that are not flagged to receive mail will not get any student-specific mail, but may receive district mailings if they reside in the district. The goal of the Receives Mail flag is to restrict mailings to only those contacts that should get mail.

Note: Even though SchoolTool only allows one primary guardian, if two parents receive mail, they are both treated as "primary."

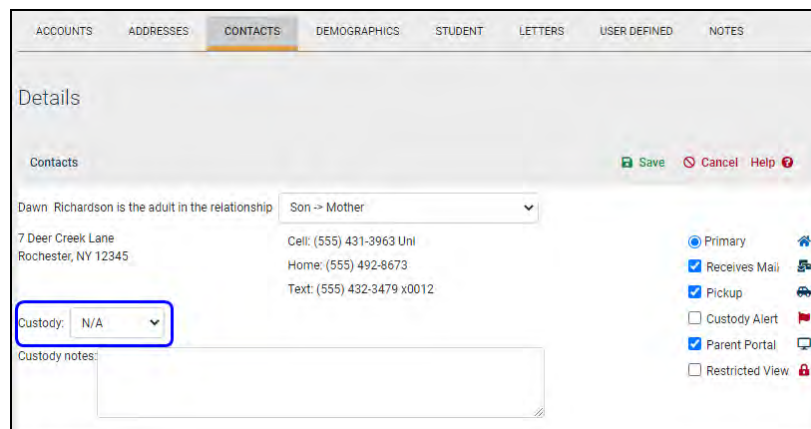
For example:

- If Mom and Dad live at the same address and have the same last name, the mailing would read "Mr. and Mrs. John Doe."
- If Mom and Dad live at the same address but have different last names, the mailing would read "Mr. John Doe and Mrs. Jane Smith."
- If Mom and Dad live at different address, even if they have the same last name, they will have two different labels.
- **Pickup** : The Pickup icon is a visual indicator that this contact has permission to enter campus and collect the student from school.
- **Custody Alert** : This flag is used only as a visual indicator that there is a Custody Alert for that relationship. See the section on Custody Rights, below for details on how to use this flag.

- Parent Portal : This checkbox is used to determine whether or not the contact can view that student's information in the Parent Portal if the contact has a local account. When setting up local accounts in the Maintenance module, accounts may only be created for adults who have this option enabled (checked).
- Restricted View : When this option is checked, the adult in that relationship will have a restricted view of contact information for that student. The adult will be unable to see addresses and phone numbers for contacts who do not live in the same household. If the student's address is tied to another contact, the adult with Restricted View will not be able to see the student's address information and/or home phone number in the Personal Information Section at the top of the student record.

Custody Rights

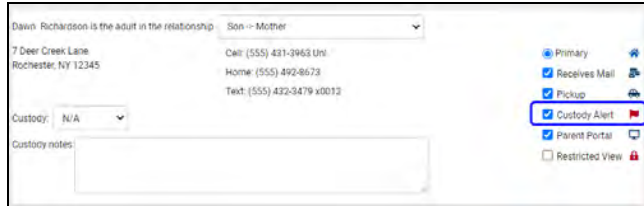
Custody information is logged and maintained in the Contacts tab of a student record. Update this information any time a custody situation changes.



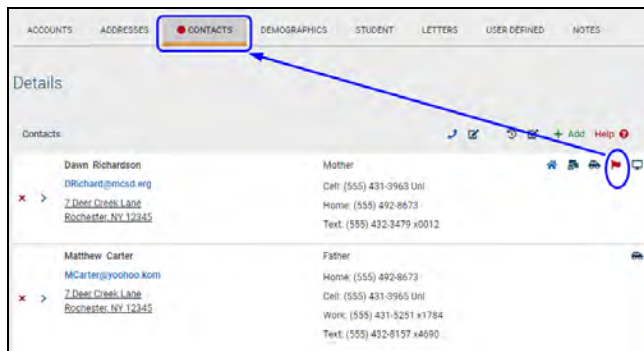
The screenshot shows the 'CONTACTS' tab in a student record. The contact is Dawn Richardson, Son -> Mother. The address is 7 Deer Creek Lane, Rochester, NY 12345. The custody dropdown is highlighted with a blue box and shows 'N/A'. The contact has a cell phone (555) 431-3963, home phone (555) 492-8673, and text phone (555) 432-3479 x0012. The contact is marked as Primary, Receives Mail, Pickup, Parent Portal, and Restricted View.

1. For each contact, there is a drop-down list with custody options. This is located on the left side of the contact row, under the contact's address information.
 - A. **If there is no custody situation** (i.e. the person is only an emergency contact, or the person is one of two parents who are married and live together in a traditional family unit), leave the default value of None selected.
 - B. Select the appropriate custody arrangement between this adult contact and this student, by selecting a value from the drop-down list:
 - None: there is no custody situation (will display as N/A).
 - Sole: primary contact has 100% custody;
 - Joint: custody is shared between two contacts, though the child resides with the primary contact most of the time (i.e. lives with one parent during the week and goes with the other on week-ends);

- 50/50: custody is shared equally between two residences/contacts (child moves back and forth);
 - No Rights: this person has no custody rights.
- C. Enter any notes regarding the situation in the free-text Custody Notes field.
- D. Set the Custody Alert  flag by checking the box, if appropriate.



Note: The use of the Custody Alert flag will cause the Contacts tab to display a red circle indicating that there is a custody situation with one or more contacts for this student. The red circle appears only after the information is saved.



- E. Repeat this for each contact listed who has custody rights.
2. Click once on the Save  button in the upper right corner of the tab to save your work. The tab will refresh in read-only mode illustrating the current custody arrangements.

Note: Custody information can be printed in the Custody Type and Alert Report under the Census module and Census Reports sub-module. Any information found in the Custody Notes free text area will display here when the report is generated.

Student Display Name

Depending on your permissions, you may have the ability to set the Student Display Name (affirmed or legal name) for each relationship/contact. This setting controls which name the contact will see when accessing information about that student in SchoolTool. This setting applies only to users who are contacts and are not faculty. All district faculty will see the student's affirmed name throughout SchoolTool.

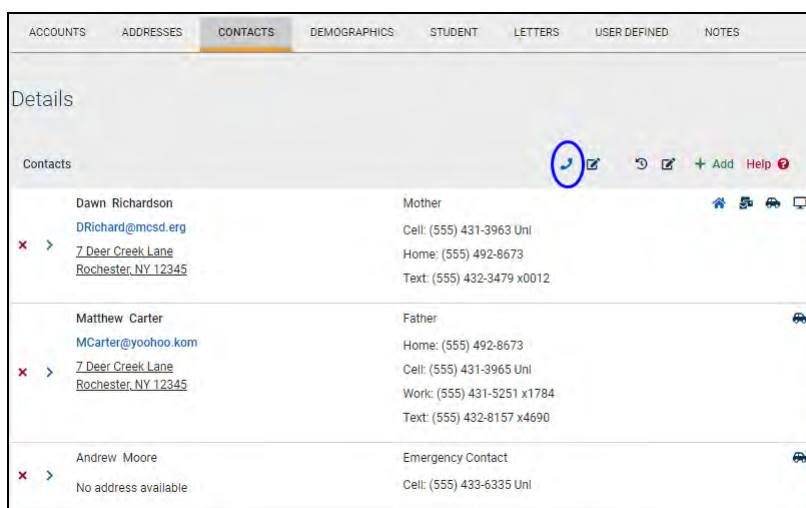
Note: It is important to note that some areas within SchoolTool will show a student's affirmed name regardless of which value is selected for the contact here. Refer to this [list of locations](#) that currently respect the "Contact Display Name" setting.

By default, all contacts are set to see Legal Name for all students. This means that all contacts will see their students referred to by their legal name (unless the student does not have a legal name explicitly defined, in which case SchoolTool will show the student's affirmed name everywhere). To change this, simply use the drop-down list to select the appropriate value and save the relationship.

|

Defining Contact Call Order

Users can define a Call Order for any student who has adult contacts. To view the existing call order for a student, click the View Call Order  button at the top of the Contacts tab.



The Call Order will display in a pop-up window.



To modify a student's Call Order, click the Edit Call Order  button.

Details

Contacts

Dawn Richardson DRichard@mcsd.org 7 Deer Creek Lane Rochester, NY 12345	Mother Cell: (555) 431-3963 Unl Home: (555) 492-8673 Text: (555) 432-3479 x0012
Matthew Carter MCarter@yoohoo.com 7 Deer Creek Lane Rochester, NY 12345	Father Home: (555) 492-8673 Cell: (555) 431-3965 Unl Work: (555) 431-5251 x1784 Text: (555) 432-8157 x4690
Andrew Moore No address available	Emergency Contact Cell: (555) 433-6335 Unl

Use the Add/Remove and Up/Down buttons to modify call order as desired, then click the Save  button.

Details

Call Order

Save Cancel Help

Chris Carter's contacts should be called in this order

Dawn Richardson, Mother, Text: (555) 432-3479 x0012 Matthew Carter, Father, Home: (555) 492-8673 Matthew Carter, Father, Text: (555) 432-8157 x4690 Dawn Richardson, Mother, Home: (555) 492-8673	Dawn Richardson, Mother, Cell: (555) 431-3963 Unl Matthew Carter, Father, Cell: (555) 431-3965 Unl Matthew Carter, Father, Work: (555) 431-5251 x1784 Andrew Moore, Emergency Contact, Cell: (555) 433-6335 Unl
--	--

ADD UP DOWN REMOVE

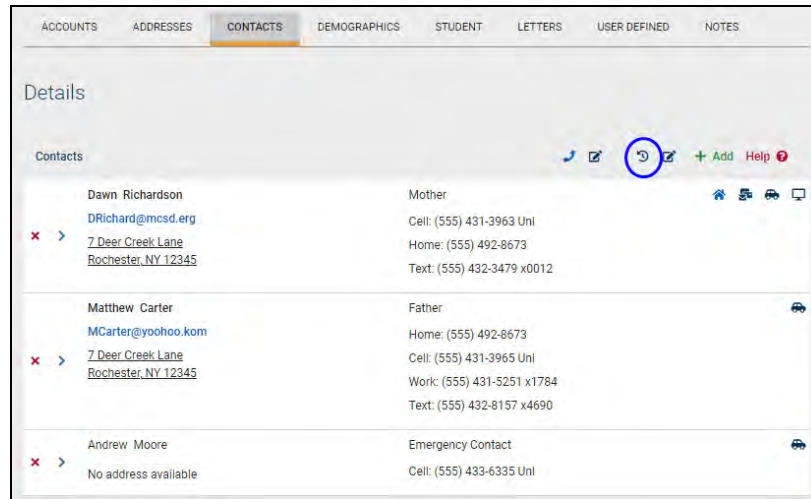
Copy call order to similar siblings:

☐ Harry Carter
☐ Charlie Carter
☐ Theresa Carter

A list of similar siblings will appear with checkboxes below the list, allowing users to copy the call order. A “similar sibling” is defined as a student who shares the same exact adult contacts. To copy the call order to one or more similar siblings, check the boxes as desired before saving.

Viewing Contact History

From the Contacts tab in the Student Record, click on the History  button to see a full history of all contacts associated with this student.



The screen will refresh to display a brief history of all contacts that have been associated with this student. This history may include Start and End Dates for that relationship, contact rights, custody designations, and any related custody notes. A separate row will be added any time a contact relationship (including changes to relationship type, primary contact indicator, or other contact rights such as parent portal or restricted view) is modified.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES					
Details					
← Back Help					
Contact History For Chris Carter					
	Start Date	End Date	Contact	Custody	Note
	7/14/2022		Dawn Richardson Mother	N/A	
	10/30/2017		Matthew Carter Father	N/A	
	8/22/2017		Andrew Moore Emergency Contact	N/A	
	8/20/2012	7/13/2022	Dawn Richardson Mother	N/A	
	8/20/2012	10/29/2017	Matthew Carter Father	N/A	

To edit the dates of any relationship in the Contact History, click the Edit button and modify the dates as appropriate. Keep in mind that dates may not overlap. A Delete icon will appear for any historical relationships that may be deleted (these must have an End Date to be deleted).

	Start Date	End Date	Contact	Custody	Note
	7/14/2022		Dawn Richardson Mother	N/A	
	10/30/2017		Matthew Carter Father	N/A	
	3/22/2017		Andrew Moore Emergency Contact	N/A	
	8/20/2012	7/13/2022	Dawn Richardson Mother	N/A	
	8/20/2012	10/29/2017	Matthew Carter Father	N/A	
	8/20/2012	7/13/2022	Chris Richardson Emergency Contact	N/A	

When you are finished viewing the Contact History, click Back to return to the Contacts tab.

Note: The Contact History does not currently show changes to the Student's Display Name setting for a relationship.

Addresses Tab

SchoolTool allows schools to maintain a database of all addresses in the entire district. The idea is to create a “database map” of all residences, work and mailing addresses which can then be used in generating state-required reports, mailing labels, bus routes and other address-driven lists/reports.

Once an address has been added to the database, users can simply select it from a list, thereby ensuring data integrity over time, and making sure that all addresses are entered in the same manner. It takes away the guesswork (Ave or Avenue? W or West?) and also allows us to maintain historic records.

Residence	202 Mulberry Drive Rochester, NY 12345 (555) 425-6643 Richard Turner Laura Turner Karen Turner	MONROE CITY CSD New Monroe
Work	250 Alexander St East St. Rochester, NY 90210	Monroe
Employer: Occupation:		
Mailing Address	PO Box 60 Molino Bridge Road Rochester, NY 12345	MONROE CITY CSD New Monroe

There are three types of addresses in SchoolTool:

- Residence addresses, which are places where people live (these could be family dwellings, apartments, institutions, group homes, etc);
- Work addresses, where guardians and/or work-age students work;
- Mailing addresses, where guardians receive mail (these could be PO Boxes, work addresses, or temporary mailing addresses).

The following functions can be performed in the **Addresses** tab for each person:

- Move In (Add) – used when this person/family is moving into a new or existing residence in or out of the district. Also known as the Add Work Address button and the Add Mailing Address button.
- Edit an address – this is used ONLY to correct a typing error in an address – for example, to change Thunderbird Street to Thunderbird St. The idea here is that everyone who lived or is living at that address is affected by this change. Changes also overwrite old addresses, thereby preventing the preservation of historical data.
- Add/Edit a Phone Number – this is used to add a phone number to an unknown address, or to change an existing phone number record.
- Move out – used when this person/family is moving from an existing residence to a NEW (known or unknown) residence in or out of the district. The idea is to move this person and all those sharing this address, but not affect the history of others who had also lived here in the past. Using Move out allows schools to maintain a history of addresses for each person/family, and also maintains data integrity.
- View Address History – shows the entire address history for this person.

Adding a New Residence Address

Use this procedure whenever you are adding a NEW residence address to a blank **Addresses** tab.

1. Locate the adult for which you will add an address. You should never add an address directly to a student's record, unless she or he is legally emancipated. Reference the Emancipating a Student section for more information.
2. Click once on the person's **Addresses** tab. Wait for the tab to refresh.

Note: There are three sections to the Addresses tab:

- Residence section, which is where the contact lives
- Work section, which is where the person works
- Mailing Address section, which is where the contact receives mail (this defaults to Residence).

If there are no addresses, each portion will show “Unknown address.” (If there is an address, skip ahead to the Modifying/editing an existing address section.)

Residence 202 Mulberry Drive
Rochester, NY 12345
(555) 425-6643
Richard Turner
Laura Turner
Karen Turner

Work 250 Alexander St
East St
Rochester, NY 50210
Employer:
Occupation:

Mailing Address PO Box 60 Molino Bridge Road
Rochester, NY 12345

MONROE CITY CSD
New Monroe

3. Add the Residence address:

- A. Click once on the green Move in **+** button to the far right of the Residence section. The tab will refresh with two questions:
 - i. When did they move? This is the date the contact moved into this address. Select the date from the pop-up calendar. This date will default to today's date. (If you don't know, choose today's date.)
 - ii. Where are they moving to?
 - **Move to a known address** means you know the street, city and zip, etc. for this person.
 - **Move to an unknown address** would only be used when the person has moved but you do not know the street, city, state, zip, etc.

When did they move?
When are these people moving to?
4/14/2020
Move to a known address
Move to an unknown address

4. Click once on the Select **>** button to the left of the appropriate option. In this example, we have selected Move to a **known address**.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS NOTES

Details

Search for address

Address: UNIT #

City: NY

County: NONE

District: NONE

SEARCH RESET

5. Enter some of the address information as search criteria.

Note: It is recommended that you search on the street name or number, but not to enter all of the details. This is the best way to avoid adding a duplicate address.

For example, to find "684 West Parke Ave," either search on "684" or search on "Parke." That way, if the address is recorded as "W Parke" or "Parke Avenue," your search is general enough to still find a match.

6. Click once on the Search button.

- If the address is found, the screen will refresh in read-only view with a list of one or more addresses.

The screenshot shows a web form titled "Details" with a "Search for address" section. The "Address" field contains "hawthorn". Below the search fields, there are two search results listed. Each result is preceded by a right-pointing arrow (>). The first result is "923 Hawthorne Lane, Unit #:", followed by "Rochester, NY 90210", "County: Monroe", and "District: MONROE CITY CSD". The second result is "169 Hawthorne St., Unit #:", followed by "Hawthorne St.", "Rochester, NY 90210", "County: Monroe", and "District: MONROE CITY CSD".

- If the address is not found, a message stating “No search results” will appear in the lower left corner of the tab.

The screenshot shows the "Search for address" form with "252" in the "Address" field and "Mulberry" in the "Unit #" field. The "County" dropdown is set to "NONE" and the "District" dropdown is also set to "NONE". In the bottom left corner, the text "No search results" is displayed in red. The "Search" and "Reset" buttons are visible at the bottom right.

Note: More information about each scenario is presented below.

If the address you are looking for already exists, follow these steps to complete the move.

1. Select ➤ the existing address you wish to use from the list.

Details

Search for address

Address: hawthorn Unit #

County: NONE NY

District: NONE

SEARCH RESET

Address

923 Hawthorne Lane
Unit #
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

168 Hawthorne St.
Unit #
Hawthorne St.
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

2. If other people are already living here, you will be prompted to move this person in with the existing residents.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Current Residents

923 Hawthorne Lane
Rochester, NY 90210
(555) 485-8888 Liv

MONROE CITY CSD
Monroe

Cancel ← → Help

These people already live at the selected address. Press the previous button to make a correction. Press the continue button to accept these changes.

Jose Wright
James Allen
Patricia Wright

3. If this is not correct, because you have the wrong address, click once on the Back ⬅ button. This returns you to the address search area where you can search for a different address.

Note: The names of the other people living at this address (or those who lived there previously) will display under the Residence section. To remove them, see the section on Moving Former Residents out to Unknown Addresses.

4. If you have the correct address, and the people living there are part of the same family, click once on the green Continue ➡ button.
5. If there are children already living at this address, you will be prompted to define a relationship with them. Define a relationship to each minor, IF APPLICABLE. It may be necessary to scroll down to see all the people listed, especially if this is a step parent moving into a home with a spouse and multiple children.

6. If there is no relationship (they have moved), simply click Save without defining any relationship details. You can then go move the previous residents out.
7. Once you have completed all tasks, the **Addresses** tab will refresh, displaying the new residence address information in both the Residence and Mailing Addresses areas.

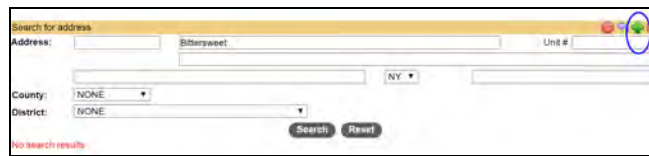
Note: The Move in button in the Residence section which you used to add the address with has now changed to a Move out button. Use the Move out button to move this person from their current address to a new address.

Note: The Add Work Address and Add Mailing Address buttons are still available in the Work and Mailing Address sections. However, once you add a work address, or add a mailing address which differs from the residence address, these will change to the Move out button.

xt)

If there was no match found, follow these steps to create the new address:

1. Use the green Create new address **+** button in the upper right corner of the tab to add this address to the database.

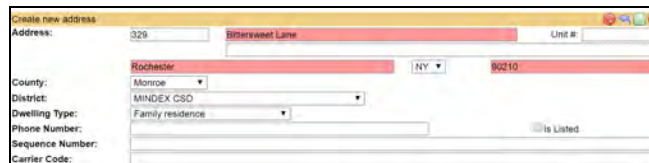


2. The Create new address tab will appear.

Note: Any data used for a search will come through into the appropriate fields.

Note: These fields do not automatically capitalize the first letter in each address element, so be sure to check your work.

3. Enter the full address:



- **Field 1** is for the house or building number. This free-text field is optional.
- **Field 2** is for the street name and/or PO BOX information. This free-text field is required. Make sure to adhere to your district standards for words like “street,” “avenue,” etc.
- **Field 3** is for the apartment or unit number. This free-text field is optional.
- **Field 4** (second row) is for line two of the address, such as a rural route or business suite. This free-text field is optional.
- **Field 5** is for the city. This free-text field is required. Make sure to add the proper city name and not an abbreviation (i.e. Rochester, not “Roch”), as this information will display on labels and letters.
- **Field 6** is for the state. The value in the drop-down list defaults to the state where this district is located. If you are adding an out-of-state address, select the new state from the drop-down.
- **Field 7** is for the zip code. This free-text field is required. Acceptable number formats include 12345, 12345-1234, or 1x1 x2x. Please note that when entering Canadian zip codes, the space is required.

Note: **County** and **District** will default to district-specific values. Change them by selecting from the drop-down fields as required. (If this information does not reflect your correct county and district contact your SchoolTool liaison).

Note: District is required in order for reports and labels to print properly.

4. Select the Dwelling Type from the drop-down field. This field will default to Family Residence.
5. Address Zones are used to help determine where a student should be enrolled based on his or her address within the district. If your district uses address zones, this list will hold pre-defined values. Select an appropriate value from the drop-down list. If your district does not use address zones, ignore this field. This field is not required.

Note: Address zones are set up and maintained in Maintenance. If you wish to use them but need to define values, contact your SchoolTool liaison.

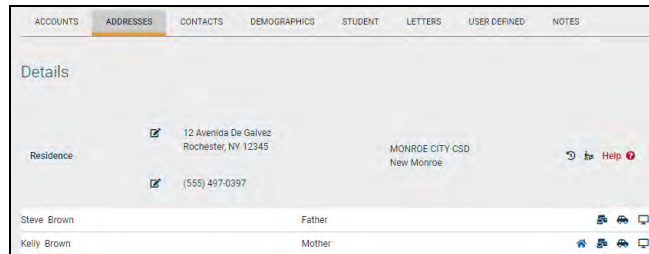
6. Enter the **Phone Number** for this residence. This numeric field will accept a seven-digit and/or a ten-digit phone number. This field is optional.
 - A. If this number is listed (public), click once in the Is Listed check box.
 - B. Enter any Sequence Number information required for postal delivery. If this is unknown, leave it blank.
 - C. Enter any Carrier Code information required for postal delivery. If this is unknown, leave it blank.

Note: The phone number is considered a land-line, tied to this home address. The phone number will also "follow" the address in the database.

7. When you have finished entering the full address, click once on the green Save  button in the upper right corner of the tab to save this address to this person's record. The tab will refresh showing you the address information in read-only view.

Note: The mailing address automatically defaults to the Residence Address unless an alternate value is entered.

Note: If enabled, Address icons will appear in the top summary section of a Person Information Record that will allow users to toggle between viewing the residence address and the mailing address. See the section on the Personal Information Section for more information on this feature.

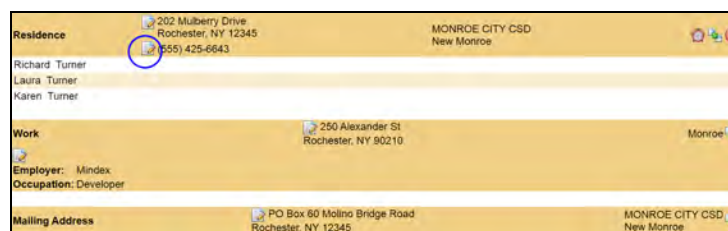


Adding or Editing a Home Phone Number

Home phone numbers are linked to residence addresses. If you want to change the phone number without changing the address, use this procedure.

If this individual does not have either a residence address, a home phone number, or both, the Addresses tab will indicate that the information is “Unknown.” To add a phone number to an “Unknown” address, follow the procedure described below. This will automatically create an address record for that contact, which will be blank (except for the state), when it adds the phone number. The blank address may be edited manually at a later time.

1. Click once on the Change Phone Number  button under the Residence address.



Note: If the phone number is unknown, you will see the Change Phone Number  button next to the words “Unknown Phone Number.”

2. The Residence section will refresh with a phone number field. If a phone number exists, it will appear in edit mode.



3. Enter or edit the phone number. As you begin typing into the field, it will turn yellow. When you have entered the correct number of digits (either 7 or 10), it will turn green, telling you the number pattern is valid.
4. Use the Is Listed check box to designate this as a listed or unlisted phone number. The default is unlisted.
5. Click once on the Save  button. The tab will refresh showing the updated phone number.

Residence	202 Mulberry Dr Rochester, NY 12345 (555) 555-6643	MONROE CITY CSD New Monroe
Richard Turner		
Laura Turner		
Karen Turner		

Modifying/Editing an Existing Address

Use this procedure to correct typographical errors in house numbers, apartment units, street names or street-city, city-zip combinations. Do NOT use this procedure to move a family from one location to another. Editing an existing address effectively writes over the top of this address, which will impact the residence database, and affects all contacts who have lived at or who currently live at the address. Refer to the *Moving Former Residents out to Unknown Addresses* and *Moving a Family to a New Address* procedures for more information on making a change that does not involve correcting a typo.

Note: Depending on the security permissions set for your role in the district, you may or may not be able to perform editing functions.

Once addresses have been added to the **Addresses** tab, Edit  buttons appear in each section. They typically appear to the left of the address or data to be edited.

1. Search to find the person whose address needs to be corrected.
2. Click once on the **Addresses** tab to reveal the Residence, Work and Mailing addresses.
3. Click once on the Edit  button to the left of the address you wish to modify.

Residence	202 Mulberry Drive Rochester, NY 12345 (555) 425-6643	MONROE CITY CSD New Monroe
Richard Turner		
Laura Turner		
Karen Turner		
Work	250 Alexander St Rochester, NY 90210	Monroe
Employer: Mindex Occupation: Developer		
Mailing Address	PO Box 60 Molino Bridge Road Rochester, NY 12345	MONROE CITY CSD New Monroe

Note: If there are multiple people living at (or sharing) this address, you will receive a prompt stating that anyone else sharing this address will be affected by a change to this address.

202 Mulberry Drive Rochester, NY 12345		MONROE CITY CSD New Monroe
Changes to the above address will affect the following people.		
Thomas Davis	4/14/2020	
Karen Turner	4/12/2013	
Laura Turner	4/14/2020	
Richard Turner	4/19/2011	

- Click once on the Continue ➔ button. The **Addresses** tab will refresh with the address information in edit mode. Notice the pink fields.

Address:	202	Mulberry Drive	Unit #	
County:	Rochester	NY	12345	
District:	New Monroe			
Dwelling Type:	MONROE CITY CSD			
Sequence Number:	Residence			
Carrier Code:				

- Make any changes on the resulting edit screen.
- Save your work by using the Save  button which is located in the upper left corner of the tab. The **Addresses** tab will refresh with the changes.

Residence	202 Mulberry Drive Rochester, NY 12345 (555) 425-6643	MONROE CITY CSD New Monroe
Richard Turner		
Laura Turner		
Karen Turner		
Work	250 Alexander St East St. Rochester, NY 90210	Monroe
Employer:		
Occupation:		
Mailing Address	PO Box 60 Molino Bridge Road Rochester, NY 12345	MONROE CITY CSD New Monroe

Adding a Mailing Address

The Mailing address automatically defaults to the person's residence address, but is easy to change if mail should be sent to another location. Mailing addresses are not required, but if you do choose to add one, the screens in this section will behave exactly as those seen in the residence address section.

To **Change the Mailing Address** to something other than the Residence address:

- Click once on the green Add Mailing Address  button to the right of the mailing address. The Search for address screen will appear.

Residence	202 Mulberry Drive Rochester, NY 12345 (555) 425-6643	MONROE CITY CSD New Monroe
Richard Turner		
Laura Turner		
Karen Turner		
Work	Unknown address	
Employer:	Mindex	
Occupation:	Developer	
Mailing Address	202 Mulberry Drive Rochester, NY 12345	

- Add search criteria for the alternate address where all mailings should be sent. Use the searching tips in the **Adding a New Residence Address** section.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS NOTES

Details

Search for address

Cancel Help

Address: Unit #:

NY

County: NONE

District: NONE

SEARCH RESET

3. Click once on the Search button.
 - If the address is found, the screen will refresh with matching addresses in a list, allowing you to select the exact address.
 - If the address is not found, a message stating “No search results” will appear in the lower left corner of the tab. Follow the steps in the **Adding a New Residence Address** section for more information on creating a new address if needed.

Details

Search for address

Cancel Help

Address: hawthorn Unit #:

NY

County: NONE

District: NONE

SEARCH RESET

Address

923 Hawthorne Lane
Unit #:
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

168 Hawthorne St.
Unit #:
Hawthorne St.
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

4. Select or create the appropriate address and click once on the green Save button to save this address to this person’s record.
5. When you have finished adding the mailing address, click the Save button to save this address to this person’s record. The tab will refresh with the new mailing address in the Mailing Address section of the Addresses tab.

Residence 202 Mulberry Drive
Rochester, NY 12345
(555) 425-6643 MONROE CITY CSD
New Monroe

Richard Turner
Laura Turner
Karen Turner

Work Unknown address

Employer: Mindex
Occupation: Developer

Mailing Address PO Box 60 Molino Bridge Road
Rochester, NY 12345 MONROE CITY CSD
New Monroe

6. The Mailing Address can also be viewed in the top portion of the Person Information Record, by selecting the toggle buttons to switch between the Residence

Address and Mailing Address (these buttons only appear if the individual has a mailing address that is different from the residence address).

- The button and its mouse-over text will change when clicked, indicating the address you are currently viewing:

Residence
 icon



Mailing Address  icon



Note: Once you have made ANY change to the Mailing Address section of the Addresses tab, the mailing address is no longer tied to this person's Residence Address. This means that if the person moves out to a new address, the Mailing Address will not automatically change to the new residence address. Any changes to it will need to be made manually.

Note: Once you add a mailing address which differs from the residence address the Add Mailing Address  buttons changes to the Move out  button. To restore the mailing address to the residence address, click Move out and choose Unknown Address. When you save, the residence address will appear.

Note: P.O. Boxes are treated like residence addresses but should only be entered into the mailing address section. Use the primary entry field for the P.O. Box information and leave the street number field empty.

Work Addresses

The Work Address section is where you can list the contact's employer, occupation, work phone, and work address, if known. This information is all optional and may be added or modified at any time. If this information has not been added, the Work Address will display "Unknown Address" and all other fields in this section will be blank.

Click the Add **+** button to add new work information, or click Edit **✎** to modify any information that has already been entered.

Adding a Work Address

Work address information is not required, but if you do choose to add one, the screens in this section will behave exactly as those seen in the residence address section.

1. Click once on the Add Work Address **+** button to the right of the Work section. The screen will refresh with the Search for address tab.

2. Enter the street name or street number as search criteria. Use the searching tips in the **Adding a New Residence Address** section.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS NOTES

Details

Search for address: Cancel Help

Address: Unit #:

NY

County: NONE

District: NONE

3. Click once on the Search button.
 - If the address is found, the screen will refresh with matching addresses in a list, allowing you to select the exact address.
 - If the address is not found, a message stating “No search results” will appear in the lower left corner of the tab. Follow the steps in the **Adding a New Residence Address** section for more information on creating a new address if needed.

Details

Search for address: Cancel Help

Address: hawthorn Unit #:

NY

County: NONE

District: NONE

Address

> 923 Hawthorne Lane
Unit #
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

> 169 Hawthorne St.
Unit #
Hawthorne St.
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

4. Select or create the appropriate address and click once on the green Save  button to save this address to this person’s record. The tab will refresh with the new work address in the **Work Address** section of the **Addresses** tab.

Residence 202 Mulberry Drive
Rochester, NY 12345
(555) 425-6643 MONROE CITY CSD
New Monroe

Richard Turner
Laura Turner
Karen Turner

Work 250 Alexander St
East St
Rochester, NY 90210 Monroe

Employer:
Occupation:

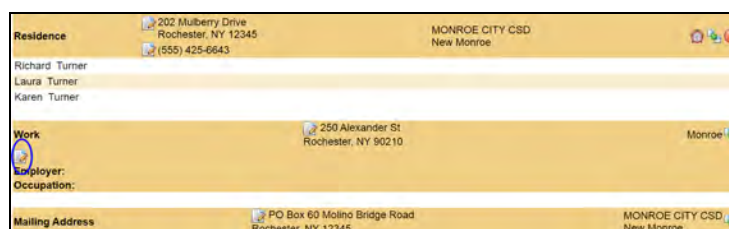
Mailing Address PO Box 60 Molino Bridge Road
Rochester, NY 12345 MONROE CITY CSD
New Monroe

Note: Once you add a work address the Add Work Address  button will change to the Move out  button.

Adding a Work Phone and/or Employer Name

Please note: Work Phones can be added from the top section of a person record (users with appropriate permissions can click the Edit  button in the upper right of the personal information section and can then modify phone numbers as needed).

1. Click once on the Edit  button above the word **Employer** in the Work address section.



The screenshot shows the 'Addresses' tab with three sections: Residence, Work, and Mailing Address. The Residence section shows 202 Mulberry Drive, Rochester, NY 12345, with phone number (555) 425-6643. The Work section shows 250 Alexander St, Rochester, NY 90210. The Mailing Address section shows PO Box 60 Molino Bridge Road, Rochester, NY 12345. The Work section is highlighted with a red circle around the Edit button.

2. The tab will refresh with editable fields where Employer and Occupation can be added.

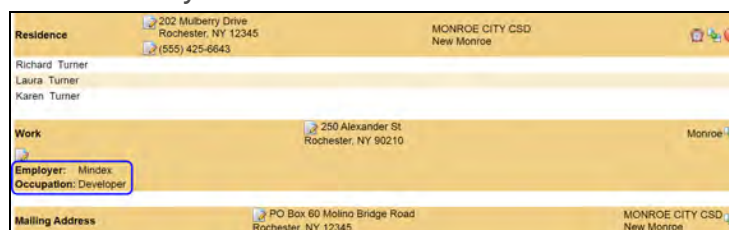


The screenshot shows the 'Work' section with a red circle around the Edit button. Below the address, there are input fields for 'Employer:' and 'Occupation:'.

- A. Enter a (or edit an existing) free-text Employer name. This is the name of the company, business, or school where this person works.
- B. Enter a (or edit an existing) free-text Occupation (i.e. Teacher, Salesman).

Note: None of this information is required.

3. Click the Save  button. The **Addresses** tab will refresh with the new employer information in read-only mode.



The screenshot shows the 'Addresses' tab with the same sections as before. The Work section now shows 'Employer: Mindex' and 'Occupation: Developer' in the input fields. The Edit button is still highlighted with a red circle.

Moving Out of a Work or Mailing Address

1. To remove a work or mailing address from an adult's **Addresses** tab, click the Move Out  button for the appropriate address type.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Residence 923 Hawthorne Lane
Rochester, NY 90210 MONROE CITY CSD
Monroe

(555) 485-8888 Uni

Jose Wright
James Allen

Work 250 Alexander St
Rochester, NY 90210 MONROE CITY CSD
Monroe

Employer:

Occupation:

Mailing Address PO BOX
Rochester, NY 90210 MONROE CITY CSD
Monroe

2. Select whether the address will be changing to a known address or an unknown address.
 - A. If the “unknown address” option is selected, the mailing address will revert to the Residence address.

Where is this person changing address to?

> Change to a known address

> Change to an unknown address

Cancel Help

- B. If the mailing address is changing to a known address, this will remove any association with the original mailing address.
 - C. You will then be able to add a new address (see the process for Adding a Work Address or Adding a Mailing Address for detailed instructions).

Moving Former Residents out to Unknown Addresses

As families move into and out of residences in the district, it is possible that inactive resident information is maintained. In these cases, you may not know where former residents have gone, but their names will still be linked to their former residences. Staff may become aware that old data is still in the database when trying to move a family into an existing residence in the district.

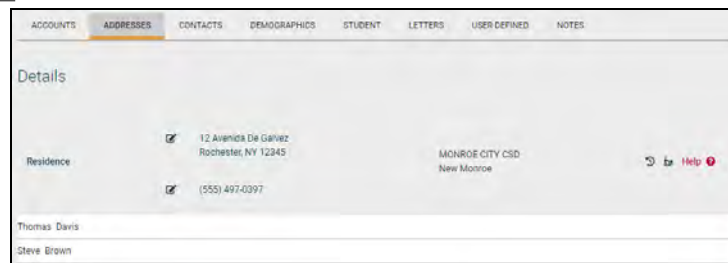
The system will show a list of people who either currently live at an existing address (who might be sharing a residence with the family) or who formerly lived there. **If they are no longer living there, they will need to be moved out.**

In this example, we have moved Thomas Davis into this address but we still see the former residents (the Brown family) who used to live at this address. They no longer live there, yet their names appear on our person’s Addresses tab.



To move these people (the Browns) out of our contact's home (and into an unknown address):

1. Locate the first of the old/former residents (one of the Browns) and go to the **Addresses** tab for that resident.



2. Click once on the Move out  button to the far right of the Residence section of the **Addresses** tab. The screen will refresh prompting you to further define who is being moved out.



3. Click once in the check boxes next to the people who are being moved out. In this example, we will select Steve and Kelly Brown (but not Thomas Davis, as he is the new resident that we just moved in).

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Move Date: 10/28/2022

The following people will be moved out of this address

Move Out of Residence Address	
☐	Thomas Davis
☐	Kelly Brown
☒	Steve Brown

Where are these people moving to?

☒ A known address
☐ An unknown address

☒ Leave phone number at current address
☐ Remove phone number from current address
☐ Transfer phone number to new address

12 Avenida De Galvez
Rochester, NY 12345
(555) 497-0397

MONROE CITY CSD
New Monroe

- Click once on the Continue ➡ button. The screen will refresh with a prompt for the date this family/person moved, and where they moved to. In our example, we do not know where the former residents live now, so we will select **Move to an unknown address**.

Where are these people moving to?

☐ A known address
☒ An unknown address

☐ Leave phone number at current address
☒ Remove phone number from current address
☐ Transfer phone number to new address

- Click once on the Select ➡ button to the left of the **Move to an unknown address** option. The screen will return you to the **Addresses** tab for this person, showing that the Residence address information is unknown.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Residence: Unknown address

Unknown phone number

- Repeat these steps for each old resident who needs to be moved out (any residents you selected in the previous step will have already been moved out as part of that operation).

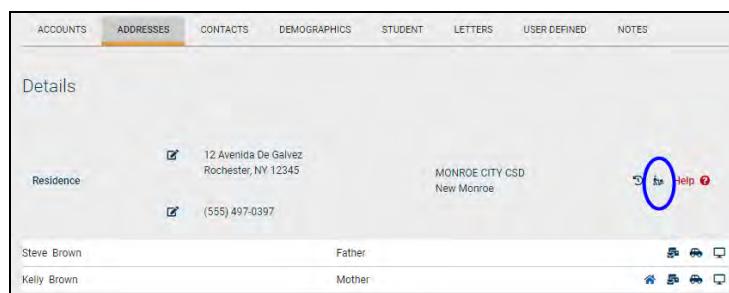
Note: To verify that the current resident's record no longer shows the former residents, return to Census Search, locate his record, and review the data on his Addresses tab.

Note: Moving former residents out, to unknown addresses, allows us to maintain their residence history, and their residence location as a possible home for other district residents. In this way, we maintain an accurate historical picture of all the people who have lived in our district.

Moving a Family to a New Address

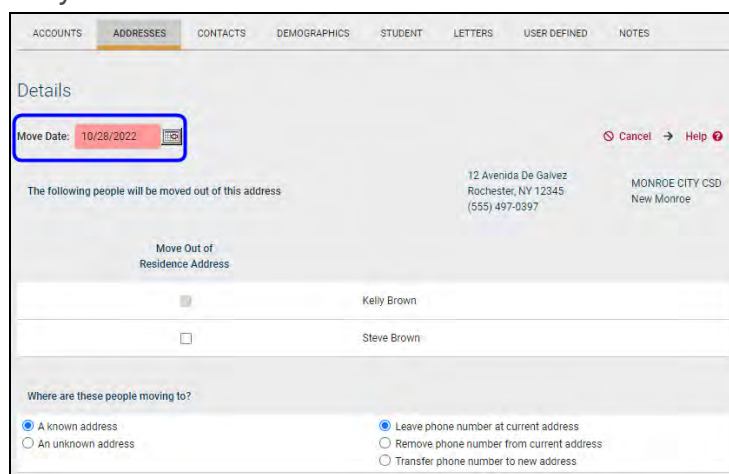
When a person moves, you will use the Move out  button to move them to a new residence location. If they share their home with students or other people, you will be given the option to move those people at the same time. Using the Move out button preserves the history of residences for this person, and also ensures data integrity, by allowing us to select a new residence from a database of existing residence locations in the district.

1. Locate the person to be moved (usually the adult guardian or a primary contact).
2. Go to his/her **Addresssestab**.
3. Click once on the Move out  button to the far right of the Residence section of the **Addresssestab**. The screen will refresh prompting you to further define who is being moved out.



The screenshot shows the 'Details' page for a residence. The 'Residence' section displays the address '12 Avenida De Galvez, Rochester, NY 12345' and the phone number '(555) 497-0397'. To the right of the address, the 'MONROE CITY CSD' is listed. On the far right of the Residence section, there is a 'Move out' button with a house icon, which is circled in blue. Below the address, the names 'Steve Brown' and 'Kelly Brown' are listed with their roles 'Father' and 'Mother' respectively.

4. Select the Move Date (the date the change is to be effective). This is set to the current date by default.



The screenshot shows the 'Move Out' dialog box. The 'Move Date' field is highlighted with a blue box and contains the date '10/28/2022'. Below the date, there is a section titled 'The following people will be moved out of this address' which lists 'Kelly Brown' and 'Steve Brown'. At the bottom, there is a section titled 'Where are these people moving to?' with three radio button options: 'A known address' (selected), 'An unknown address', and 'Leave phone number at current address' (selected). There are also two more radio button options: 'Remove phone number from current address' and 'Transfer phone number to new address'.

Note: When moving out, ***always*** move the primary guardian first. This automatically moves all students living with the primary guardian at the same time. If you try to move a family by moving one of the students to a new residence, you will be prompted with a message asking you if you are sure you

want to move this student out of the household. This allows you to decide if the student is being emancipated or if you really meant to move the whole family. To move the whole family, click Cancel. Then search for the guardian's record and move the family from there. To move the student, click OK and continue. Refer to the *Emancipating a Student* section for more information.

- A. Check the boxes in the Residence column for each person who is moving out with this person.
- B. Use the Move Out of Mailing Address check boxes to remove mailing addresses from adults as appropriate. Mailing Address checkboxes will only appear for residents who have a separate mailing address specified.

- C. The lower portion of the screen allows users to use radio buttons specify whether the selected people are moving to a known or unknown address. If "A known address" is selected, the user may search for an address on the following screen.

- D. Additionally, they must choose what to do with the phone number:
 - i. Leave phone number at current address: the phone number will remain at the current address and will be removed from the records of all people selected to move out of the residence.
 - ii. Remove phone number from current address: the phone number will be removed from the current address and will be removed from the records of all people selected to move out of the residence.
 - iii. Transfer phone number to new address: the phone number will be removed from the current address and will be transferred to the new address. This phone number will be reflected on the records of all people selected to move out of the residence. Additionally, this phone number will overwrite any

existing phone numbers tied to the new address. This option is unavailable when moving to a new, unknown address.

Note: If you are moving a family out for a future date, the only option available for phone numbers is “Leave phone number at current address.”

5. Click the Continue ➔ button to apply these changes and search for an address as appropriate.
6. The screen will refresh with the Search for address screen. Enter the street name or number as search criteria.

7. Click once on the **Search** button.
8. Locate the address in the list of matching addresses (if no matches result, go to the *Adding a New Residence Address* section).

9. Click the Select ➔ button to the left of the address where this person/family is moving to.
 - A. If there are adults already living at this address, you will be prompted to either correct this (click the Previous ⬅ button) or to accept this (click the Continue ➔ button).

- B. If any other children are already living at this address, you will be prompted to define the relationships between the adult(s) and those students when you click Continue. Click Save  when each relationship has been defined.

10. When all steps are complete, the Addresses tab will refresh showing the new address in the Residence section, along with the names of any other adults selected during the Move out in step 5 above.

Emancipating a Student

Occasionally it may be necessary to move a student out of the home of their primary guardian and into their own residence. In SchoolTool, this is called “emancipating” the student.

The process to move a student out is the same as the process to move a family out. The only difference is that when you click the Move out  button for a student, you will be

prompted with a message asking if you are sure you want to move this student out of the household. This allows you to decide if the student is being emancipated or if you really intended to move everyone in the house to a new location. To move the student, click OK and continue.

1. Locate the student to be emancipated and open the student's **Address** tab.

2. Click once on the Move out button to the far right of the Residence section. Because SchoolTool recognizes that this is a student, you will be prompted to confirm that you are emancipating the student.

3. Click OK to continue. The screen will refresh with a prompt for the date the student moved, and where they moved (are moving) to.

4. Click once on the Select button to the left of the Move to a known address option. The screen will refresh with the Search for address screen.

5. Enter the street name or number as search criteria.
6. Click once on the **Search** button.

7. Locate the address in the list of matching addresses (if no matches result, go to the *Adding a New Residence Address* section). Click the Select > button to the left of the address where this student is moving to.

Details

Search for address

Cancel ← + Help ?

Address: hawthorn Unit #

NY

County: NONE

District: NONE

SEARCH RESET

Address

923 Hawthorne Lane
Unit #
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

168 Hawthorne St.
Unit #
Hawthorne St.
Rochester, NY 90210
County: Monroe
District: MONROE CITY CSD

8. The **Address** tab will refresh showing the new address in the Residence section.

ACCOUNTS ADDRESSES CONTACTS DEMOGRAPHICS STUDENT LETTERS USER DEFINED NOTES

Details

Residence

1668 Hawthorne St.
Rochester, NY 90210

(555) 497-0397

MONROE CITY CSD
New Monroe

Help ?

Note: If this student is moving into a residence where other people already live, you may be prompted to confirm that this is correct. Use this opportunity to confirm that you have selected the correct address. Click the continue → button when you have finished.

Viewing the Residence History

To view the Residence History for a person, click the History ⌚ button in the Residence section of the Addresses tab. From this screen you can view the history for all Residence addresses, including the Start and End Dates for those addresses.

Note that the history for a student comes from their primary contact. Changes to an adult contact will also impact any students for whom that adult is a primary contact.

To edit the dates of any address record in the Residence History, click the Edit ✎ button and modify the dates as appropriate. A Delete ✖ icon will appear for any historical records that may be deleted (these must have an End Date to be deleted).

Details		
← Back Help		
Residence History For James Allen		
Start Date	End Date	Address
10/5/2021		923 Hawthorne Lane Rochester, NY 90210
2/24/2020	10/5/2021	12 E Island Road Rochester, NY 12345

Addresses Tab – Frequently Asked Questions

Question: Once you've added an address, how can you delete it?

Answer: Because SchoolTool allows users to build and maintain a Residence database, you will never delete an address. You can either move a person or family to an unknown residence, or move them to a different known residence.

Question: What is the difference between editing an address and moving a family out of one address and into another address?

Answer: Editing or modifying an address changes that address and affects every person that lives or lived at that address. Moving a family out is different because it allows us to maintain the original address location (where another family could move into), while building an address history for this person/family.

Question: How do I see the history of addresses?

Answer: Click once on the History  button in the Residence section of the Addresses tab, and the entire address history for this person will appear.

Question: Where can I enter home and work phone numbers?

Answer: Home and work phone numbers are found on the Addresses tab. Use the appropriate Edit  button (either Change phone number or Edit Work Address) in its respective address section to add/change this information.

Question: Is there any way to add a person's phone number without an address?

Answer: Yes, but you must use the Create new contact button when adding a new contact from within a person's information record. This is the only time users will be presented with options for adding phone numbers without addresses.

Question: If I add an address and phone number for a family, and that family moves, and another family moves into their old address, how come the phone number already appears?

Answer: The "old" phone number from the previous family is tied to the physical residence address. When a family moves into a known address which was found in the database, the old phone number comes through. This phone number can be changed at any time.

Question: When a family is moving, should I move the student or the adult contact she or he lives with?

Answer: Always move the primary guardian. The student's address will automatically update to reflect the address of his/her primary guardian, and any other people living in the household will also be automatically moved. This is the least amount of work for the user.

Demographics Tab

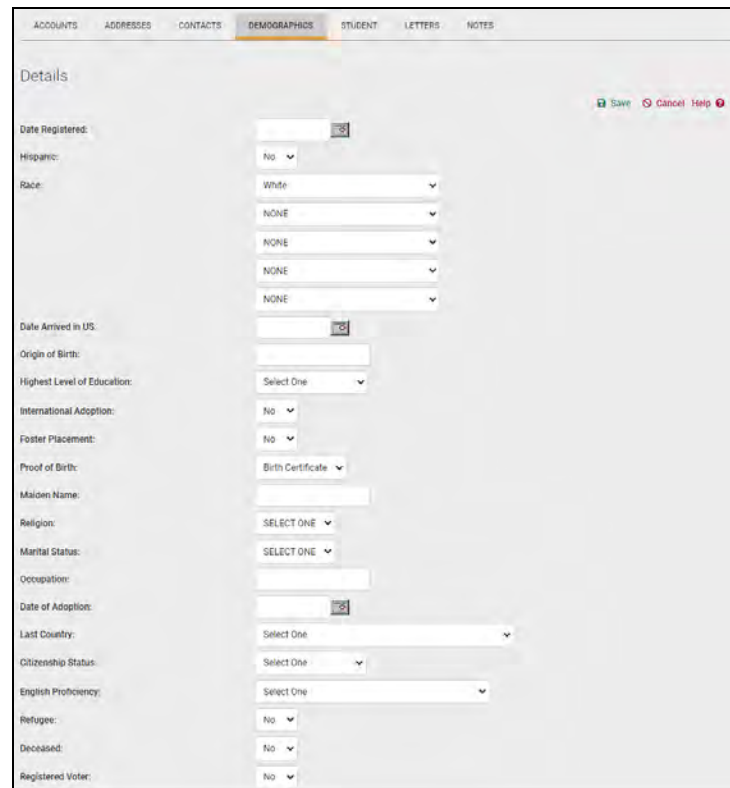
The **Demographics** tab contains information such as the date the student was registered, their ethnicity, their refugee and citizenship status, their proof of birth, etc. It also contains some information which is not relevant for students, such as maiden name, voter registration, etc. Ignore any fields for which you do not have data.

The existing default data for your district will appear in read-only mode.

The screenshot shows the 'Demographics' tab selected in a software interface. The tab is highlighted with an orange underline. The interface has a top navigation bar with tabs: ACCOUNTS, ADDRESSES, CONTACTS, DEMOGRAPHICS, STUDENT, LETTERS, and NOTES. Below the navigation bar, the 'Details' section is visible. It contains a list of demographic fields and their corresponding values. A 'Help' icon is located in the top right corner of the details section.

Field	Value
Date Registered:	
Hispanic:	No
Race:	White
Date Arrived in US:	
Origin of Birth:	
Highest Level of Education:	
International Adoption:	No
Foster Placement:	No
Proof of Birth:	
Maiden Name:	
Religion:	
Marital Status:	
Occupation:	
Date of Adoption:	
Last Country:	
Citizenship Status:	
English Proficiency:	
Refugee:	No
Deceased:	No
Registered Voter:	No
Homeless (Pre 2018-2019):	No
Migrant:	No
Immigrant:	No
Neglected or Delinquent:	No
Years in US Schools Override:	
Years of LEP Override:	
Date of Entry into Grade 9 Override:	N/A
District of Residence Override:	
2021-2022 Value:	
Career Pathway:	None
Education Level of Parent:	
Crisis Impact Code:	
Crisis Name:	

1. To modify Demographics information, click once on the Edit  button to open the tab in edit mode.



2. Add and/or modify demographic data by entering directly into free-text fields, selecting from drop-down lists, and using pop-up calendars to enter dates.
3. When you have finished entering all details, click once on the green Save  button in the upper right corner of the tab. The **Demographics** tab will refresh with the information in read-only mode.

Note: For information about which fields are used in the **NYS Data Warehouse** export, please refer to the NYS Data Warehouse Export documentation.

Overriding a Cohort Value

The Cohort value is typically calculated by SchoolTool, and should only be overridden if the calculated values are incorrect. This should only be the case where enrollment data for the student is incomplete or exceptional, as in the case of a student that was enrolled as a 9th grader in another district.

To override the value, open the Demographics tab in edit mode and enter the appropriate Cohort override value.



Once saved, the overridden values will be displayed.

Date of Entry into Grade 9 Override:	7/1/2019
(Current: 7/1/2019, Cohort: 2019)	

For both read-only and edit modes, "NA" will display for Cohort if a student has not yet reached grade 9 and does not have an override value specified. In no case will a student be exported to the data warehouse before entering grade 9.

This may also be accomplished for a group of students by using the Batch Edit Demographics feature.

Student Tab

The **Student** tab contains all program service records, including enrollment information, Student Lite information, AIS, section 504, disabilities, LEP, etc. Depending on your permissions, you may or may not have access to add or view all program service records for a student. By default, the Student Tab typically displays the Enrollment view. The view may be changed by selecting another option from the drop-down in the upper left corner.

The screenshot displays the 'Student' tab interface. At the top, a navigation bar includes tabs for ACCOUNTS, ADDRESSES, CONTACTS, DEMOGRAPHICS, STUDENT (which is highlighted), LETTERS, USER DEFINED, and NOTES. Below this, a 'Details' section features a dropdown menu currently set to 'Enrollment'. To the right of the dropdown are 'Help' and '+ Add' links. The main content area is divided into two sections: 'Enrollment' and 'Projected Enrollment'. The 'Enrollment' section shows 'Official Enrollment' for '0011-Regular School Year Enrollment: 10/28/2024 - 12/27/2024' at 'Mindex HS / High School'. It includes a 'Class of: 2027-2028' and 'Grade: 9'. An 'Exit reason: (170) Transferred to Another NYS Public School Outside This District with Documentation' is listed, along with creation and modification timestamps. The 'Projected Enrollment' section shows '0011-Regular School Year Enrollment: 12/31/2024' and 'School Year: 2024-2025' at 'Mindex HS/High School'. It includes a 'Class of: 2026-2027' and 'Grade: 10'. An 'Exit reason for current enrollment:' is listed, along with creation and modification timestamps.

Enrollment View

The various program service records can be accessed by selecting the appropriate view from the drop-down menu in the upper left corner of the Student tab. Depending on your permissions, you may or may not have access to add or view all program service records for a student.

The Enrollment view is the default.

Note: Each student must be enrolled before they can be scheduled for classes. A student cannot be enrolled unless he or she has the following information entered in SchoolTool:

- First Name
- Last Name
- Date of Birth
- Gender
- First language

From the drop-down list under the **Details** tab, select the Enrollment program service. Three types of enrollment records may be added here:

- The Official Enrollment record is the active record for the current school year. It assumes that the student is enrolled and will begin attending classes immediately.
- The Projected Enrollment record is a placeholder for a future official enrollment record. It assumes that the student has registered but will not begin attending until a specified date in the future. When that future date arrives, users will need to create an Official Enrollment record in order to schedule the student, using the **Census > Batch Enrollment** sub-module. Students with projected enrollments can be scheduled but will not appear in teacher lists for attendance until they are officially enrolled.
- The Alternate Enrollment record allows students to be scheduled in multiple locations. While alternate enrollments can be added without an official enrollment, at least one official or projected enrollment is required before a schedule can be created. A student may have one or more alternate enrollments for a given school year.

Adding a New Official Enrollment

This is where you will add current “official” enrollment information for the student. A student must be enrolled in a district-based school before they can be scheduled for classes.

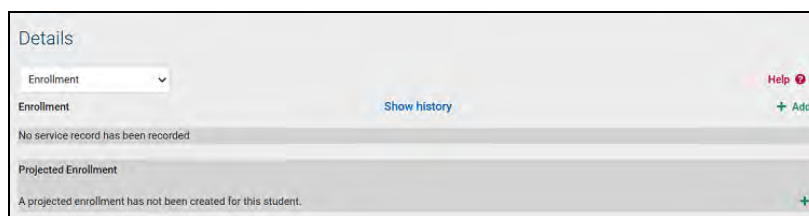
Note: An Official Enrollment is a current enrollment which started in the past or today, but not a date in the future.

You may also add official enrollments to keep track of students who reside in your district but do not attend district-based schools, and students who may have left school or been transferred to another out-of-district school. Remember that accuracy is critical when adding these records, as they will impact state and district reports.

Open the **Student** tab. The Enrollments view is the default.

If the student is already enrolled, the existing records will display.

If there is no enrollment, the “No service record has been recorded” message appears.

The screenshot shows a web interface for student enrollment. At the top, there's a 'Details' header. Below it is a dropdown menu currently set to 'Enrollment'. To the right of the dropdown is a 'Help' icon with a red circle. Below the dropdown, the word 'Enrollment' is displayed, followed by a 'Show history' link. To the right of this is a green '+ Add' button. Below this section, a message states 'No service record has been recorded'. Further down, there's a section for 'Projected Enrollment' with a message 'A projected enrollment has not been created for this student.' and a green '+' icon to the right.

Note: The Enrollment view of the Student tab also allows for the entry of a projected enrollment. If you wish to add an enrollment for a date in the future, reference the section on Projected Enrollments.

Click once on the green Add + button to the right of the Enrollment section. The Enrollment Category drop-down defaults to Official Enrollment. Leave this selected if you are adding the current active enrollment record for this student.

Use the additional fields to complete the enrollment data. The following example illustrates adding an enrollment for a high school student.

The screenshot shows the 'Details' page for an enrollment record. At the top, there's a 'Details' header and a 'Help' icon. Below that, the 'Enrollment' section includes a dropdown for 'Enrollment', a 'Save' button, and a 'Cancel' button. The 'Enrollment Category' is set to 'Official Enrollment'. The 'Enrollment Type' is '0011-Regular School Year Enrollment'. The 'Start' date is '7/1/2023'. The 'End' date is 'Current'. The 'Date Registered' is empty. The 'Provider' is 'Minix HS'. The 'Grade' is '9'. The 'Class of' is '2027-2028'. The 'Counselor' is 'NONE'. The 'Special Education' checkbox is unchecked. The 'Exit Reason' is a dropdown menu. The 'Entry Note' is a text area.

Enter the enrollment information:

Note: After each selection, wait for the screen to refresh. Depending on your selections, more options may appear or data in lists may change.

- **Enrollment Type:** this is the enrollment type – i.e. Regular School Year (the default), Foreign Exchange, District-based BOCES, etc. Select the appropriate type from the drop-down list.

Note: Enrollment types are determined and configured in Maintenance by each district. For definitions, please contact your SchoolTool liaison.

- **Start date:** This is the effective date of the enrollment. Use the pop-up calendar or manually enter the date in mm/dd/yyyy format. This date cannot be a date in the future, such as tomorrow or next week. (If you are entering an enrollment for a future date, you must enter a Projected Enrollment instead of an Official Enrollment.)
- **End:** Choose the radio button for Current (the default).
- **Date Registered:** This is the date the student registered in our district. This date also appears on the student's Demographics tab. If you have already entered a Date Registered there, it will appear here. If not, use the pop-up calendar or manually enter the date in mm/dd/yyyy format.
- **Provider:** For students enrolled in and attending district-based schools: Select the first radio button (the default), which includes the district school level and building

drop-down lists. For students who attend non-district schools, use the second radio button to select a non-district school from the drop-down list of NYS BEDS code providers. If entered, the non-district provider will be displayed in the top information section of the student's record.

Note: Once you select a Provider and save this record, the Provider cannot be changed.

Note: If the non-district school is not found in the list, you may need to add a new one.

- **Is Placed** means that this student has been placed at this non-district provider by your district so he or she can receive program services your district cannot provide, OR that another district has placed this student in your school so he or she can receive services that their home district does not provide. Check the box as appropriate.

Note: The use of the Is Placed flag is critical in order to make sure that student enrollment program service data exports correctly to STEP and the NYS Data Warehouse.

- **Include In Rank:** This means that this student will be ranked (or not) along with peers. The default is for the box to be checked. If the box is checked, the student will be ranked and will have a class rank. If the box is not checked, the student will not be ranked. This is often the case with foreign exchange students.
- **Grade:** select the grade you are enrolling the student in from the drop-down list. This list will contain all the grades set up for the selected provider and could include grades such as 13, 14, UE/UGE, or US/UGS for ungraded levels.
- **Alternate NYS Reported Grade:** Ungraded (UGE/UGS) students may now be assigned a grade that is appropriate for their courses, while a different grade is reported to the state. This information exists in student enrollment records only for Data Warehousing purposes.

This field is an optional field that only needs to be filled in if the grade level reported to NYS is different from the student's in-district grade level

If needed, select the appropriate value from the drop-down list. The alternate grade will appear in parentheses in an enrollment record.

If no alternate grade is selected, the field value will default to N/A and will not appear in View mode of enrollment records.

- **Class:** there are two drop-down lists here:

- The first is for the student's year of graduation.
- The second is for the projected month of graduation. (The default value for this field is None.)



Note: Depending on the grade selected, the Class may automatically update.

- **Homeroom:** select the homeroom the student is assigned to from the drop-down list. The list of Homerooms is particular to the selected provider.
- **Counselor:** select the student's counselor from the drop-down list. The list of Counselors is defined by your district. Contact your SchoolTool liaison if names are missing or incorrect.
- **Diploma:** select a diploma type from the drop-down list, if appropriate. Choose None for elementary students.

Note: This Diploma type does not get exported to the NYS Data Warehouse, it is for informational purposes only. This list of Diploma options is fully configurable in Maintenance.

- **Race:** this drop-down field only appears on the very first enrollment record, and is required if this information has not yet been included in a student record. Depending on how the district has configured SchoolTool options, the field may appear pre-filled with a district-set default value.

Note: After the initial enrollment is saved, the Race field will no longer appear on enrollment records.

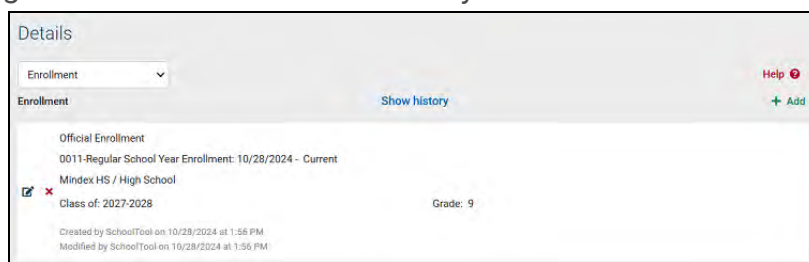
- **Special Education:** check the box if the student should be counted as Special Ed on reports, such as the Regents Exam report which breaks down general education and special education populations. The default assumes that the student is part of the general education population for Data Warehouse reporting.

Note: After you have saved a new enrollment, Special Education information is found in the Student tab, General Program Services information area. It is no longer part of the active enrollment.

- **Entry Note:** Enter a free-text entry note, if applicable. Entry note details might include transfer details if the student came from another school, or ranking information.

Note: If entry note information exists, it will be exported to the NYS Data Warehouse.

When you have completed the new enrollment, click once on the green Save  button in the upper right corner to save this enrollment program service record. The tab will refresh showing the enrollment data in read-only mode.



The screenshot shows the 'Details' tab for an enrollment record. At the top, there is a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with a 'Show history' link and a '+ Add' button. The main content area displays the following information: 'Official Enrollment', '0011-Regular School Year Enrollment: 10/28/2024 - Current', 'Mindex HS / High School', 'Class of: 2027-2028', and 'Grade: 9'. At the bottom, it states 'Created by SchoolTool on 10/28/2024 at 1:56 PM' and 'Modified by SchoolTool on 10/28/2024 at 1:56 PM'.

Note: This current enrollment record drives several NY State-aid reports. It is critical that information such as the Enrollment type, the Provider, Start and End dates, the Is Placed flag, the Special Ed flag, and Grade, are entered correctly.

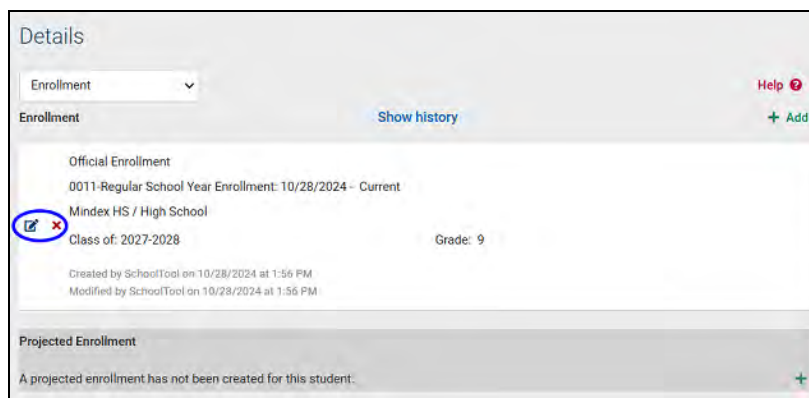
Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Editing an Official Enrollment

Sometimes, enrollment data may be incomplete, or may need to be updated. For example, you may need to add an entry note, or change the student's year of graduation or Homeroom. Use this procedure to make changes to existing current enrollments.

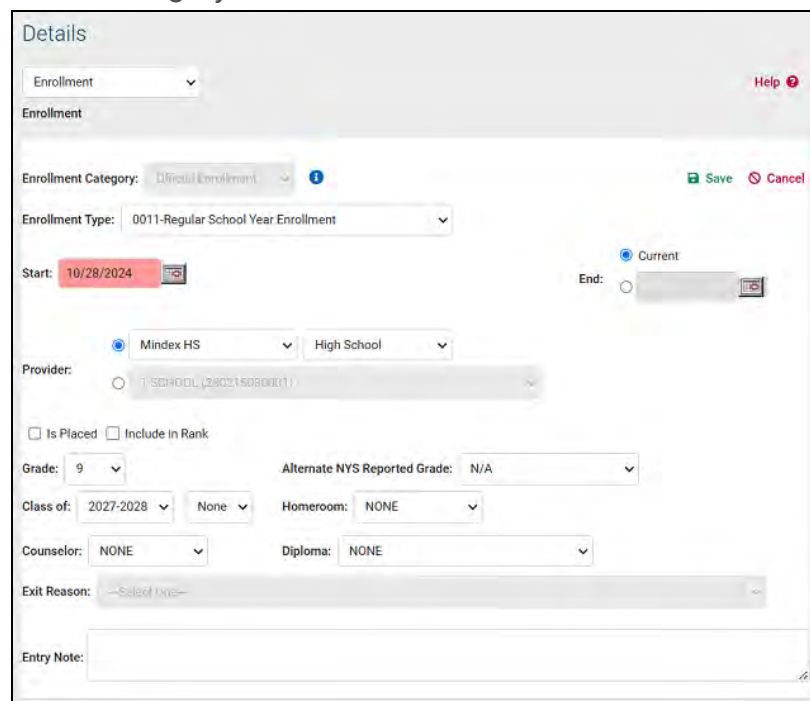
Open the student's **Student** tab. The tab will refresh with the current enrollment record in read-only mode.



This screenshot is similar to the previous one, but it highlights the 'Mindex HS / High School' field with a red circle and a red 'x' icon, indicating that this field is being edited or is in an error state. The rest of the form content remains the same.

Click once on the Edit  button to the left of the **Official Enrollment** information. The tab will refresh in the edit mode, where you can make changes.

Note: The Enrollment Category cannot be edited once it has been saved.



The screenshot shows a web form titled "Details" for editing enrollment information. At the top, there's a dropdown menu set to "Enrollment" and a "Help" link. Below this, the "Enrollment" section is active. The form includes fields for "Enrollment Category" (set to "Official Enrollment"), "Enrollment Type" (set to "0011-Regular School Year Enrollment"), "Start" date (10/28/2024), and "End" date (with a "Current" radio button selected). There are also dropdowns for "Provider" (set to "Mindex HS") and "High School". Below these are checkboxes for "Is Placed" and "Include in Rank". Further down are fields for "Grade" (9), "Alternate NYS Reported Grade" (N/A), "Class of" (2027-2028), "Homeroom" (NONE), "Counselor" (NONE), and "Diploma" (NONE). At the bottom, there's an "Exit Reason" dropdown and an "Entry Note" text area. In the top right corner, there are "Save" and "Cancel" buttons.

Edit the enrollment information. If you need more information about the fields and options, refer to the Adding a New Official Enrollment section.

Note: After each selection, wait for the screen to refresh. Depending on your selections, more options may appear, or data in lists may change.

When you have finished, click once on the green Save  button in the upper right corner of the Official Enrollment record to save this enrollment information. The tab will refresh showing the enrollment data in read-only mode.

Ending an Official Enrollment

When students leave a school, their enrollment records need to be closed. Use this procedure to end an existing current enrollment. Examples might be when a student graduates, moves on to the next school level within the district, or leaves the district for a specific reason. (For more information about transferring students, reference the Transferring Enrollments section).

This procedure would also be used when the student's enrollment type changes, such as switching from a Regular School Enrollment to a District-based BOCES enrollment.

Navigate to the **Student** tab. The tab will refresh with the current enrollment record in read-only mode.

The screenshot shows the 'Details' page for a student's enrollment. At the top, there's a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with a 'Show history' link and an 'Add' button. The main content area displays 'Official Enrollment' information: '0011-Regular School Year Enrollment: 10/28/2024 - Current', 'MindeX HS / High School', and 'Class of: 2027-2028'. A red circle highlights the 'Edit' icon (a pencil) to the left of the school name. Below this, it says 'Grade: 9' and provides creation/modification timestamps. The 'Projected Enrollment' section at the bottom states 'A projected enrollment has not been created for this student.' with an 'Add' button.

Click once on the Edit  button to the left of the Official Enrollment information. The tab will refresh in the edit mode, where you can end this record.

To end the enrollment, you must first specify an end date. Choose the radio button to the left of the date field, and enter an end date for the enrollment record. End dates must be in the same school year as the start date.

The screenshot shows the enrollment record in edit mode. At the top, there's a dropdown menu set to 'Enrollment' and a 'Help' icon. Below this, the 'Enrollment' section is active, with 'Save' and 'Cancel' buttons. The 'Enrollment Category' is set to 'Official Enrollment'. The 'Enrollment Type' is '0011-Regular School Year Enrollment'. The 'Start' date is '10/28/2024'. The 'End' date is '1/3/2025', with a radio button selected next to it. The 'Provider' is 'MindeX HS / High School'. There are checkboxes for 'Is Placed' and 'Include in Rank'. The 'Grade' is '9', and the 'Alternate NYS Reported Grade' is 'N/A'. The 'Class of' is '2027-2028', and the 'Homeroom' is 'NONE'. The 'Counselor' is 'NONE', and the 'Diploma' is 'NONE'. The 'Exit Reason' dropdown menu is highlighted with a red box and a blue arrow pointing to it. Below this are fields for 'Entry Note' and 'Exit Note'.

Note: After each change or new selection, you must wait for the screen to refresh. Depending on your selections, more options may appear, or data in lists may change.

The screen will refresh, allowing you to specify why this enrollment is ending. Select an appropriate reason from the Exit Reason drop-down list.

Enrollment

Enrollment Category: Official Enrollment ?

Enrollment Type: 0011-Regular School Year Enrollment

Start: 10/28/2024 📅

End: 1/3/2025 📅

Provider: MindeX HS High School

Grade: 9

Class of: 2027-2028 None

Counselor: NONE

Exit Reason: --Select One--

Entry Note: Completed grade

Exit Note: High School Completers

Projected End: 0011-4

MindeX

Class

Exit re

Create

Modify

Save Cancel

Current

Alternate NYS Reported Grade: N/A

Homeroom: NONE

Diploma: NONE

Is Placed ☐ Include in Rank ☐

085 - Earned IEP Diploma

085 - Earned Commencement Credential in Career Development & Occupational Studies

085 - Earned Commencement Credential in Skills and Achievement

629 - Previously Earned an IEP Diploma

629 - Previously Earned Commencement Credential in Career Development & Occupational Studies

629 - Previously Earned Commencement Credential in Skills and Achievement

High School Equivalency (HSE)

816 - Earned a High School Equivalency (HSE) Diploma

Transfers to Other Schools

153 - Transferred to Another School in This District or to an Out-of-District Placement

170 - Transferred to Another NYS Public School Outside This District with Documentation

204 - Transferred to a NYS religious and independent (nonpublic) school with documentation

Note: The values in this drop-down list correspond with NYS Data Warehouse exit reasons. Each item in the list contains its numeric NYS Data Warehouse Code and the name of the exit reason.

Click here for more information about ending enrollments for P-Tech students

For students with a P-Tech program service record that is not ended or that has been ended with a reason of None or Completed, choosing code 0065 or 0071 (071) as the exit reason will report the selected code in the School Entry Exit Data Warehouse export.

If either code is chosen, an additional drop-down for Credential Type appears. The value chosen in this drop-down will report in the Student Lite Data Warehouse export along with the Career Path selected on the Demographics tab.

Enter a free-text Exit Note, if appropriate. An exit note might include information such as why this enrollment has ended or where the student has gone.

Save your work by clicking once on the green Save  button in the upper right corner of the tab. The screen will refresh showing you the details of the edited official enrollment in read-only mode.



The screenshot shows a web interface for an enrollment record. At the top, there is a dropdown menu labeled 'Enrollment' and a 'Show history' link. Below this, the record details are displayed: 'Official Enrollment', '0011-Regular School Year Enrollment: 10/28/2024 - 12/27/2024', and 'Mindex HS / High School'. A red 'X' icon and the text 'Class of: 2027-2028' are visible, along with 'Grade: 9'. At the bottom, the 'Exit reason' is listed as '(170) Transferred to Another NYS Public School Outside This District with Documentation'. The record was created by SchoolTool on 10/28/2024 at 1:56 PM and modified by SchoolTool on 10/28/2024 at 5:31 PM. A green '+ Add' button is in the top right corner.

Add the new enrollment at the new district school or provider; reference the Adding New Official Enrollment section for more information.

Note: This current enrollment record drives several state-aid reports. It is critical that information such as type of Enrollment and enrollment Provider are entered correctly.

Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers in order for the Data Warehouse export to be accurate.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Transferring Enrollments

This procedure covers all transfer scenarios, including when students leave the district to attend school elsewhere, and when students in large districts move and must transfer between schools in the same district. The actual steps involved are to end the current active enrollment and create a new enrollment to reflect where the student has gone.

Note: Do not use this procedure if the student has completed the highest grade in this school building, or if they have graduated, left without information, or been permanently expelled. Refer to the Ending an Official Enrollment section for more information in these cases.

Navigate to the student's **Student** tab. The tab will refresh with the current enrollment record in read-only mode.

Click once on the Edit  button to the left of the Official Enrollment information. The tab will refresh with the current enrollment data in the edit mode. End the current enrollment by selecting an end date and then specifying an exit reason.

End Date: Choose the radio button to the left of the date field, and enter the date the student's enrollment in this school ends. (Enter the date in the mm/dd/yyyy format or select a date by using the pop-up calendar.) End dates must be in the same school year as the start date.

The tab will refresh allowing you to select an Exit reason from the formerly grayed-out Exit reason drop-down list.

Note: Enrollment records should only be ended AFTER a student has left this school. It is not possible to have an old enrollment that ended today and a new enrollment

beginning today. For example, if the student is transferring between buildings, end the enrollment at building A on the last day at building A and begin a new enrollment in building B on the first day they will attend the new school. If the end date of the one is the same as the start date of the other, a date range conflict will occur. Remember you cannot enter an official enrollment for a date in the future.

Exit Reason: Select the appropriate Exit Reason from among the various transfer options listed in the drop-down list, or select the Completed Grade option to transfer the student to the next level in this school.

Note: The values in this drop-down list correspond with NYS Data Warehouse exit reasons. Each item in the list contains its numeric NYS Data Warehouse Code and the name of the exit reason.

Enter a free-text Exit Note, if appropriate. An exit note might include information such as why this enrollment has ended or where the student has gone.

Save your work by clicking once on the green Save  button in the upper right corner of the tab. The screen will refresh showing you the details of the edited official enrollment.

Add a new enrollment at the new district school or provider; reference the Adding New Official Enrollment section for more information.

Note: This current enrollment record drives several state-aid reports. It is critical that information such as type of Enrollment and enrollment Provider are entered correctly.

Note: If your district places students in alternate institutions such as other schools or BOCES-locations, you must have current enrollment records reflecting students enrolled in these alternate providers in order for the Data Warehouse export to be accurate.

Note: If your district is required to report on students living in the district who do not attend your district's schools, there must be current enrollments for each of those students to show where they are attending. Without such records, reports may not be accurate.

Adding or Editing a Projected Enrollment

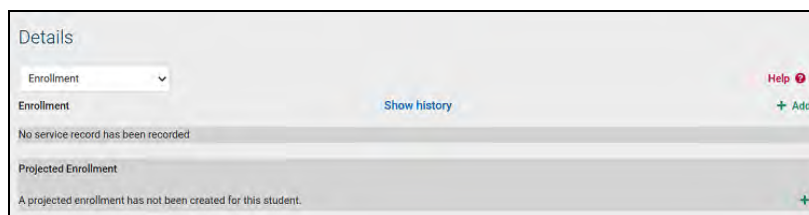
This process is for adding a new “pre” or projected enrollment record for a student who has registered, but will not begin attending courses until a date in the future. Once a student has been pre-enrolled, he/she can be scheduled for courses. For example, incoming elementary students, new students who are transferring to your district mid-year, etc. require a projected enrollment.

The **Projected Enrollment** record serves as a placeholder. When the student's projected start date arrives, this information can be transferred over to a current Official

Enrollment record using the **Census > Batch Enrollment** sub-module or on a per-student basis using the Auto Start feature.

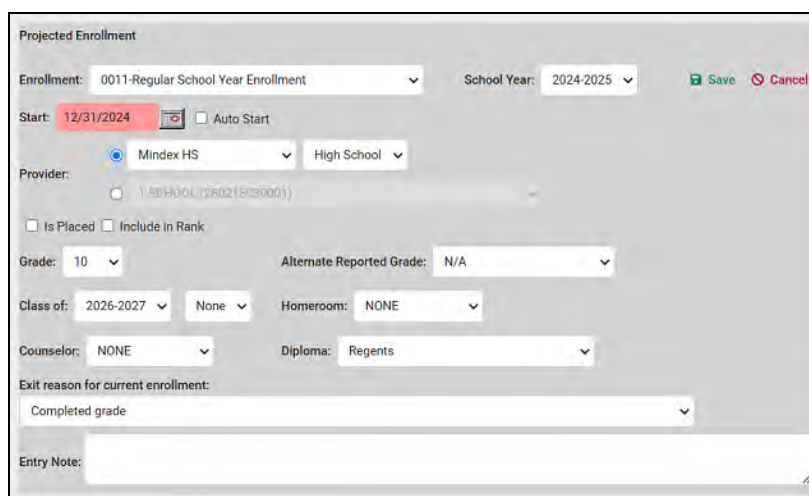
Note: Currently there are no alerts or reminders tied to projected start dates. If projected enrollments are not set to automatically start, users must check the **Batch Enrollment** sub-module each day, transitioning over enrollments as they become official.

Navigate to the **Student** tab.



Note: In the drop-down list under the Details tab, the option for Enrollment appears. This is the default program service.

Click once on the green Add **+** button to the right of the Projected Enrollment section. This is where you add the projected future enrollment record for this student. The tab will refresh with fields where enrollment data may be added.

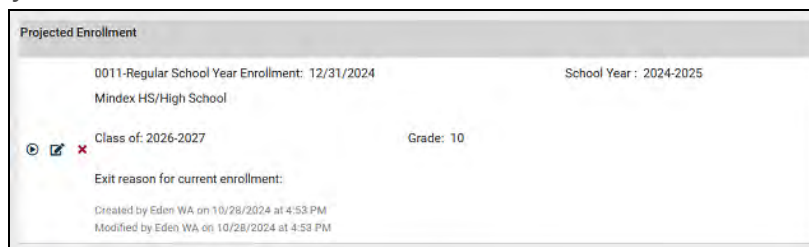


Note: The Projected Enrollment record contains all of the same fields found in the Official Enrollment, except one – the school year. Choose the year the student is being projected to enroll in first. If the student will begin attending classes today, an **Official Enrollment** is needed instead of a projected enrollment.

Note: An “Auto Start” checkbox may appear beside the Start Date, depending on your district’s settings. If available, checking this option will cause the projected enrollment to automatically transition to a current official enrollment on the specified start date.

Enter the projected enrollment information. For more information on how to complete each field, reference the procedure for Adding a New Official Enrollment.

When you have finished completing all known details for the projected enrollment, click once on the green Save  button in the upper right corner of the Projected Enrollment record to save this enrollment information. The tab will refresh showing the enrollment data in read-only mode.



The screenshot shows a 'Projected Enrollment' form. At the top, it displays '0011-Regular School Year Enrollment: 12/31/2024' and 'School Year : 2024-2025'. Below this is 'Mindex HS/High School'. The 'Class of: 2026-2027' and 'Grade: 10' are listed. There are icons for edit, delete, and a red 'x' next to the class of. Below these is the text 'Exit reason for current enrollment:'. At the bottom, it says 'Created by Eden WA on 10/28/2024 at 4:53 PM' and 'Modified by Eden WA on 10/28/2024 at 4:53 PM'.

Now that the student has a projected enrollment record, you will be able to retrieve him/her in searches, report on them, and schedule them into classes.

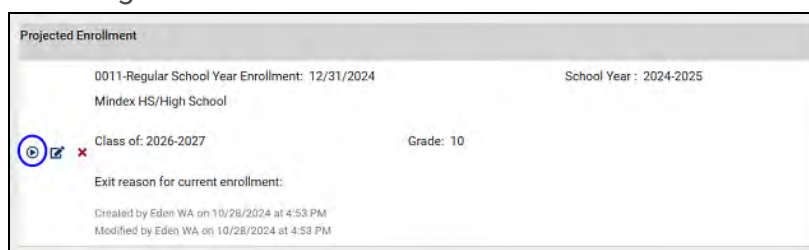
Note: To make course selections for a student who will transfer to a district school for the following school year, refer to the Scheduling User Guide documentation for more information (specifically, see the section on Course Selection > Projected Schedule for a Transfer Student).

Note: A student can only have one projected enrollment at a time.

Note: You can also add Projected Enrollments in Batch mode by using the Batch Enrollment sub-module.

A Projected Enrollment can be edited at any time by clicking the Edit  button, modifying the appropriate fields, and clicking the green Save  to apply the changes.

Depending on district settings, users may also see a Start Projected  button on projected enrollments. Clicking on this button will transition the projected to a current official enrollment using the current date as the enrollment start date.



This screenshot is identical to the one above, but the 'Start Projected' button (a circle with a right-pointing triangle) is highlighted with a blue circle.

Creating New Providers

Occasionally you may need to add new providers to the list of non-district educational institutions where students who live in your district may attend or be placed. The

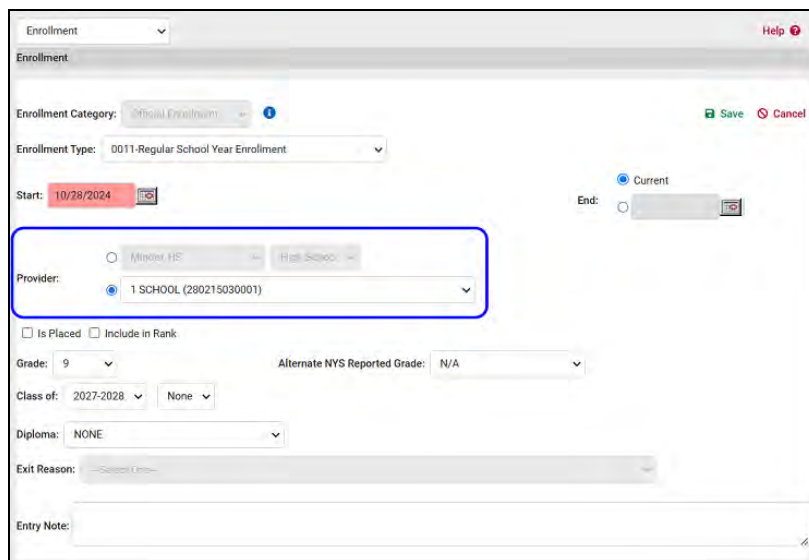
process for adding a new provider for a new student involves adding the new provider at the same time that the initial enrollment record is created.

If you need to add a new provider for an existing student, the assumption is that the student is being placed at the new provider by the district, or is transferring there (and thus leaving a district-based school). In either case, the existing enrollment must be ended with an appropriate reason, so a new one, with the new provider, can be created. Before proceeding with the steps below, follow the steps in the Transferring Enrollments section to end the current enrollment with an appropriate exit reason (such as Transferred to Another NYS Public School Outside This District with Documentation). Once that's complete, add a new enrollment record and use the steps below to create the new provider during that process.

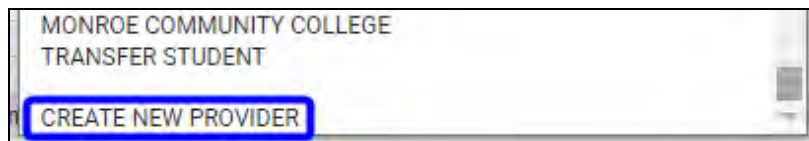
Adding a New Provider for a New or Existing Student:

Add a new enrollment record (refer to the *Adding a New Official Enrollment* section for more information).

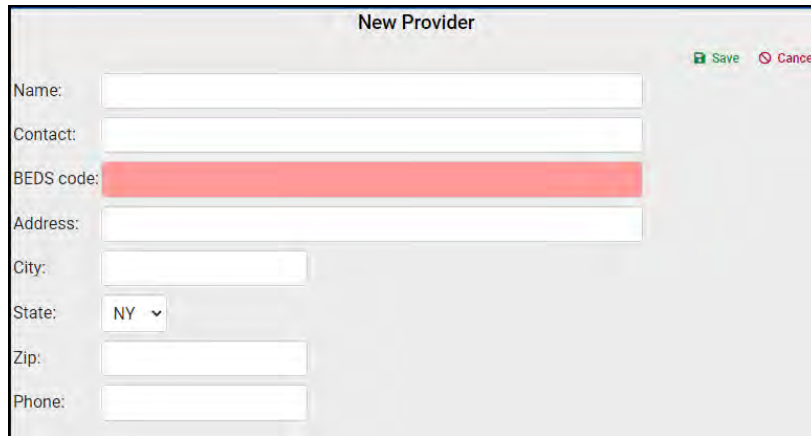
Locate the Provider radio buttons and select the second radio option, to the left of the non-district drop-down list.



Open the list to reveal the list of existing non-district providers. Scroll to the bottom of the list and select the CREATE NEW PROVIDER option.



A New Provider window will appear with fields for the school details.

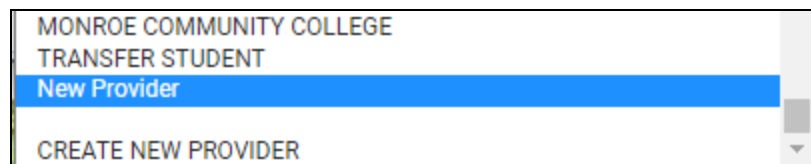


Add the school name and BEDS code (required). If you have a contact name, address, and phone number, enter those details at this time.

Note: If you do not have a BEDS code, the field will accept a zero.

Note: After adding a new BEDS code provider, contact SchoolTool support to ensure the new BEDS code is formally entered in the table. If this is not done, reports may not reflect accurate enrollments at this provider.

When you have finished defining the new provider, click once on the green Save  button in the upper right corner. The new school will now appear at the bottom of the list.



Continue adding the rest of the enrollment for this student. The newly added provider will automatically appear as the chosen alternate provider.

Note: Immediately after adding a new provider to the list, it appears at the bottom of the list, just above the CREATE NEW PROVIDER option. After you save, the new provider will automatically sort in the appropriate alpha order along with other providers, so it may be used again for other enrollments after you save the enrollment.

Note: If the provider is out of state, i.e. a school in Florida, enter a "0" as the BEDS code.

Note: Once you have saved the new provider, you can no longer edit the details like the name, contact, address, BEDS code, etc. from within this area. If you need to make a change, contact your SchoolTool liaison.

Managing Alternate Enrollments

Alternate enrollments can be managed for all students in the following areas:

- **Census > Batch Enrollment:** Add and/or remove alternate enrollments for groups of students
- **Counseling > Batch Edit Enrollment:** Edit alternate enrollment fields on selected records

They can also be added, edited, and deleted for an individual student from the Enrollment view on the **Census > Student** tab or the **Counseling > Student** tab.

The Enrollment view on the Student tab shows any existing alternate enrollments for current and future school years.

Enrollment

Enrollment

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2023 - Current

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 10

Homeroom: 180

Counselor: Roberts

Created by SchoolTool on 7/7/2023 at 9:42 AM

Modified by SchoolTool on 9/18/2023 at 11:07 AM

Alternate Enrollment

10/28/2024 - Current

Mindex MS / Middle School

Created by SchoolTool on 10/28/2024 at 10:45 AM

Modified by SchoolTool on 10/28/2024 at 10:46 AM

Projected Enrollment

A projected enrollment has not been created for this student.

Click the “Show History” link to view a history of past alternate enrollments.

Details

Enrollment

Enrollment

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2023 - Current

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 10

Homeroom: 180

Counselor: Roberts

Created by SchoolTool on 7/7/2023 at 9:42 AM

Modified by SchoolTool on 9/18/2023 at 11:07 AM

Alternate Enrollment

10/28/2024 - Current

Mindex MS / Middle School

Created by SchoolTool on 10/28/2024 at 10:45 AM

Modified by SchoolTool on 10/28/2024 at 10:46 AM

Official Enrollment

0011-Regular School Year Enrollment: 7/1/2022 - 6/30/2023

Mindex HS / High School

Include in Rank

Class of: 2025-2026

Grade: 9

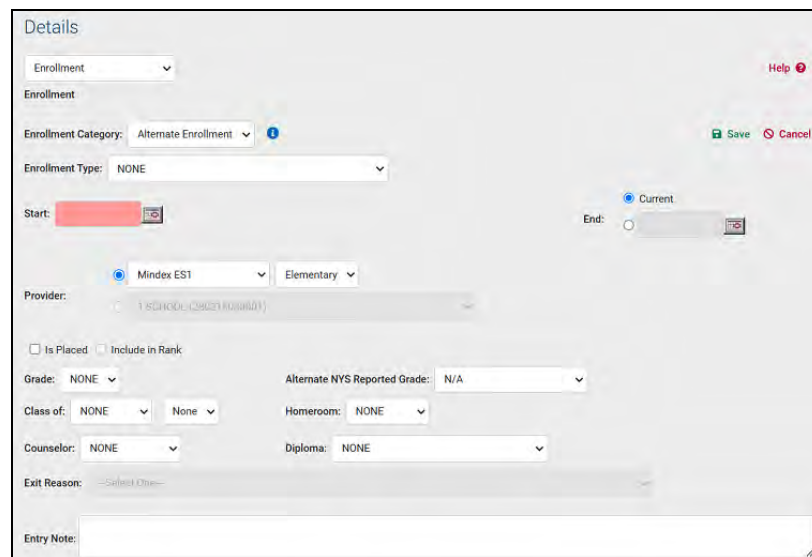
Homeroom: 154

Counselor: Roberts

Created by SchoolTool on 7/8/2022 at 10:23 AM

Modified by SchoolTool on 7/7/2023 at 9:42 AM

To add a new alternate enrollment, click the Add **+** button. The screen will refresh with the enrollment fields. Choose Alternate Enrollment from the Enrollment Category drop-down.



Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, Diploma, and Entry Note. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments can only be created for in-district providers. The Include in Rank checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available. This is not required.

Click Save  once the desired fields have been completed.

Once an alternate enrollment has been added, the student can be scheduled into courses for that location for that school year.

Current Program Services View

The Current Program Services view provides a list of all currently active program service records for that student. This view is read-only.

1. Open the program services drop-down list in the upper left corner of the **Student** tab
2. Select Current Program Services from the drop-down menu. The information will display in read-only mode. To modify any of these records, navigate to the

appropriate program service's view using the drop-down menu.

General View

The General view provides users with access to that student's individual locker assignments, student ID, and their Special Education flag status (if designated as Special Ed on their official enrollment record).

1. Open the program services drop-down list in the upper left corner of the **Student** tab.
2. Select General from the top of the list. The General information will display in read-only mode.

3. Click once on the Edit  button in the upper right corner of the tab. The information will appear in edit mode.

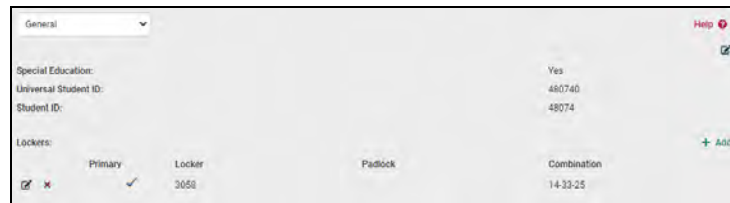
4. When you have finished, click the Update  button to save any changes.

Student ID Numbers

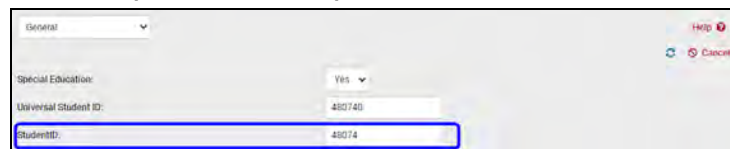
As students are added to SchoolTool, their ID numbers are auto-generated based on a seed number defined in Maintenance. However, SchoolTool allows you to override the student ID number when you enroll a student into the district. To do this, you must have entered in all the valid information to enroll the student properly. For example, a student who previously left may return and the district may wish to give that student his/her old student ID number again.

Override a Student ID Number

1. Locate the student that you wish to change using the **Census** or **Counseling > Search** sub-module.
2. Select the student's **Student** tab and once the screen refreshes, you will see their enrollment information.
3. From the program service drop down list select General. This is where you can change the ID number generated for the student.
4. When the screen refreshes, you will see a read-only view of general information about this student.



5. Click the Edit  button to change information in this area. When the screen refreshes in edit mode, remove the ID from the Student ID field and add the "new" ID number. Spaces are not permitted.



6. Save your work by clicking the blue Update  button in the upper right. If the Student ID number contains more than 9 characters, you will see a warning message; click OK to save the ID as is, or click Cancel to return and enter a different ID number.

Note: If you enter in a number that is already in use, you will get an error message indicating that you cannot enter in a number that is active. ID numbers that include leading zeroes will not be considered to be unique compared to those that do not include leading zeroes.

Note: Student ID number may only contain numeric values.

Note: Access to the student ID field is permission driven. If you cannot see or change the information here, you do not have rights to do so. Contact your SchoolTool liaison for more information.

Delete a Student ID Number

Sometimes a student ID number is incorrectly assigned to a parent or guardian. This could occur when an incorrect relationship was entered between the parent/guardian and the child. The following steps illustrate how to delete/remove the ID. Keep in mind ID numbers for students tied to certain types of data cannot be deleted.

1. Locate the parent/guardian using the **Counseling Search** sub-module.
2. Go to the **Student** tab and select General from the drop down menu.
3. Click the Delete **X** button to remove the ID number.
4. You will be asked to confirm the deletion. click OK to continue.
5. The ID number will now be removed.

Edit Special Education Information for a Student

After an official enrollment has been saved for a student, the Special Ed check box (flag) moves from the Enrollment program service record to the General program service record.

1. Select General from the top of the list. The General information view will display in read-only mode.

2. Click once on the Edit button in the upper right corner of the tab. The information will appear in edit mode.

3. Change the Special Education designation (yes/no) by selecting the appropriate value from the drop-down list.
4. When you have finished, click the Update button to save this change.

Note: This Special Education designation is what drives the special education student-population percentages on certain reports such as the Regents Exam report.

Note: Special Education doesn't mean the student has an IEP, section 504, or receives AIS services. It is simply a flag to denote a Special Education population for reports.

Note: Your district-specific permissions determine whether you can access and alter special education information. If you are unable to select the General program service, or edit the record, you may not have the necessary permissions. Contact your district liaison for more information.

Student Lockers

The Lockers section displays a list of locker and/or padlock assignments.

The screenshot shows the 'General' tab of a student record. Under the 'Lockers' section, there is a table with the following data:

Primary	Locker	Padlock	Combination
☒	3058		14-33-25

An 'Add' button with a green plus icon is located to the right of the table.

To add a locker and/or padlock, click the Add **+** button. A new row will appear in the Lockers list. Specify whether or not this is a primary locker/padlock assignment, select the locker and/or padlock from the drop-down, and click the Save **S** button to apply these changes. Combinations are assigned to lockers and padlocks in the Maintenance module and will be populated on this screen automatically after selections are saved.

This screenshot shows the 'Add' button (green plus icon) being clicked. A new row has been added to the 'Lockers' table, and the 'Save' button (green 'S') is now visible. The new row contains the following data:

Primary	Locker	Padlock	Combination
☐	NONE	NONE	

Referral View

The Referral view is used to add Referrals to outside agencies. This view is used by districts who are familiar with the referral process and assumes the person entering the referral is knowledgeable about the fields contained on this screen.

1. To access the Referral view, select Referral from the drop-down menu in the top left corner of the Student tab.
2. Click the Add **+** button to add a new referral record.
3. On the Add Referral screen, complete all required fields and enter any other information as appropriate.

4. When you have finished, click the Update  button to save this change.

Student Lite View

The Student Lite View area allows users with the appropriate security rights to view and/or edit the information exported to the Data Warehouse for the Student Lite export for that student.

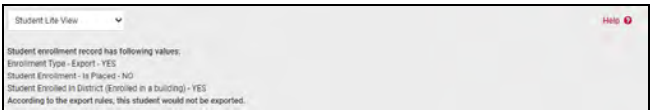
1. To access the Student Lite View, select it from the Program Services drop-down list.
2. The screen will refresh to display the Student Lite View in read-only mode. This view defaults to the current school year and the Standard Data Warehouse export format. To change the view, simply select the appropriate value from the school year or export format drop-downs and click the Select  button to refresh the information.

#	Field Name	Student Value
1	DISTRICT CODE	NY261600
2	LOCATION CODE	0003
3	SCHOOL YEAR DATE	2022-12-30
4	STUDENT ID	000048074
5	LAST NAME	Allen
6	FIRST NAME	Jathen
7	MIDDLE INITIAL	A
8	GRADE LEVEL	10
9	HOME ROOM	163
10	BIRTH DATE	2006-11-05
11	GENDER	M
12	ETHNICITY	W
13	HOME LANGUAGE	ENG
14	CHALLENGE TYPE	
15	LEVEL OF INTEGRATION	
16	LEP PARTICIPATION	

- A. If a student does not have an enrollment record for the selected year, the user will see a message to that effect:



- B. If a student has an enrollment record for the selected year but the student’s records will not be exported (based on the export rules defined in **Maintenance > Export**), the user will see a message about the student’s enrollment record values:



3. To modify this information, click on the Edit  button.

The screenshot shows the "Student Life View" interface in edit mode. At the top, there is a dropdown menu for the school year, currently set to "2021-2022". Below this is a table with the following data:

#	Field Name	Student Value
1	DISTRICT CODE	NY261600
2	LOCATION CODE	0003
3	SCHOOL YEAR DATE	2022-12-30
4	STUDENT ID	000048074
5	LAST NAME	Allen

An "Edit" button with a pencil icon is circled in blue in the top right corner of the table area.

4. The screen will refresh with the view in edit mode, and editable fields will appear next to the current values.

- A. Editable fields will be populated with the current data. To change these values, simply enter the new information and click Save.

The screenshot shows the "Student Life View" interface in edit mode. The table from the previous screenshot is shown, but with additional input fields for modification. The "STUDENT ID" row has an input field containing "48074". The "LAST NAME" row has an input field containing "Allen". The "FIRST NAME" row has an input field containing "James". At the top right, there are "Cancel" and "Save" buttons.

Note: Changes made in this area will be reflected in the Data Warehouse export **and in the student’s record**. Therefore, use caution when modifying any information in this area.

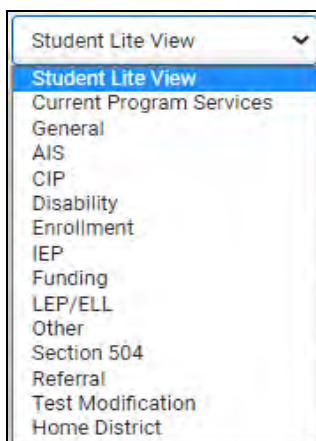
Program Services Views

Note: The AIS and IEP program services have icons that may be visible in the Student Information Record. These icons also have mouse-over text and pop-up windows (pop-up screens are activated when the icon is clicked). Individual permissions control the rights to see each feature (icons, mouse-over text, and/or pop-up windows) for each of the two program services. Therefore some users may be able to see only the AIS details but not IEP details, others may see only icons but no mouse-over text or pop-up screens, and others may not see any references at all to these items.

Note: While the basic procedure for adding, editing, or deleting a program service record is the same for all program services, each program service has its own set of fields. Some program services are dependent on others; therefore, some records cannot be added until a corresponding record has been created for another program service. The specific dependencies, along with screen shots and descriptions of the fields available when adding each program service, are detailed in Counseling Appendix: Program Services

Adding Program Service Records

1. Select the appropriate program service type from the drop-down list on the Student tab. In this example, we see an AIS (Academic Intervention Services) record.



2. When the record refreshes, use the green Add  button to add a new record.

Note: If no record exists, a message indicating “No service record has been recorded” appears. If a record exists, it will appear in read-only mode.

3. Complete all required fields, and any other fields for which you have information.

4. When you have finished, click once on the Update button. The tab will refresh with the record in read-only mode.
5. Repeat these steps for each different program service record.

Note: The fields will vary depending on the program service you selected. The options that appear in the drop down lists are created in Maintenance. Contact your SchoolTool liaison if something needs to be added.

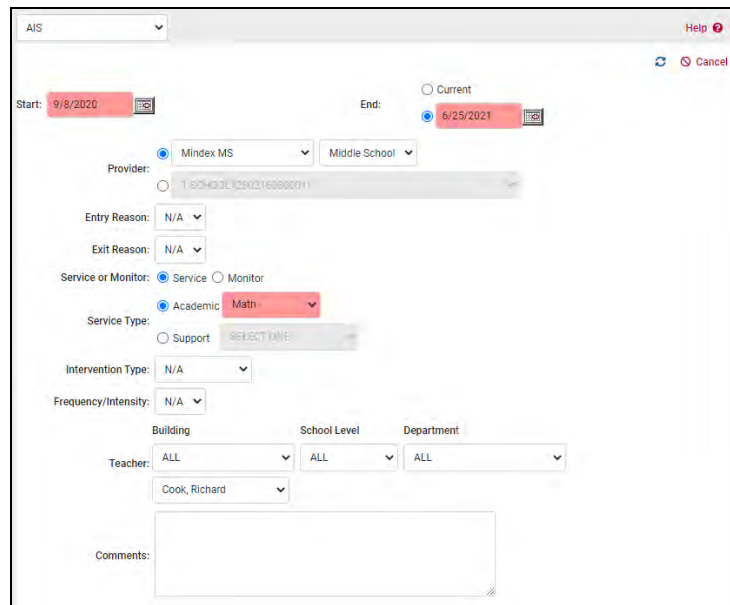
Note: A failure message will result for any of the following situations:

- Adding a program service to a student that already has that program service, if duplication is not allowed.
- Adding a program service to a student that is missing a DOB
- Adding a program service to a student that is missing a Primary Language
- Trying to remove a program service for any student that doesn't already have one that matches the specified criteria.

Editing Program Service Records

1. Select the Program Service to be edited from the drop down list. Click the Edit button to the left of the record. In this case we will use an AIS record.

2. Edit the appropriate fields and click the Update  button



3. You will now see the record in read-only mode with your changes.

Deleting Program Service Records

1. Select the Program Service to be edited from the drop down list. Click the Delete  button to the left of the record.
2. You will be asked to confirm the deletion. Click OK to delete the record.

Home District View

To add, edit, or view home district assignments, navigate to the Student tab and select Home District from the drop-down. Any existing home district records will be displayed.

In order for data sharing to function, home districts and district connections must be defined, and the student must have corresponding home district records at both districts. This means that both districts must enter a home district (which must be tied to the appropriate district connection in Maintenance) *and* the student's ID at the other district in this record.

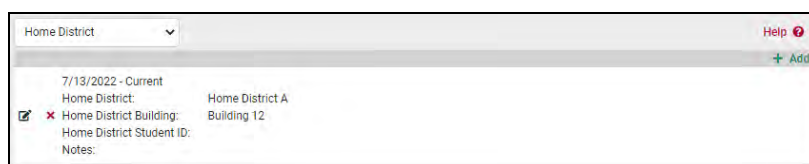
Home district records may only be assigned to individuals who have a Student ID.

This option will not be available in the drop-down if no home districts have been defined in Maintenance.

In order to properly track historical data, home district assignments should be treated similarly to enrollment records. That is, when the student changes to a different home

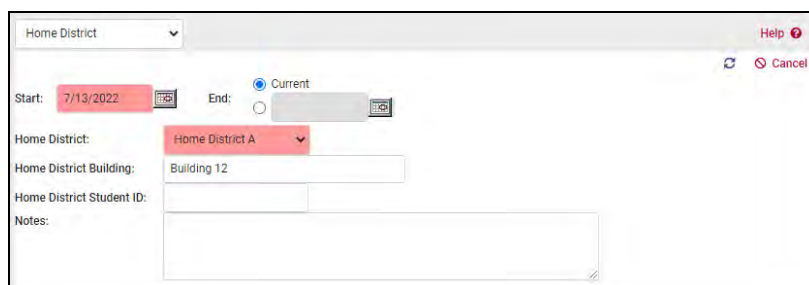
district, the prior record should be ended and a new record should be created. This allows the district to maintain an accurate historical representation of that student's home district assignments.

Click Add  to create a new home district record or click Edit  to modify an existing record. To remove a record entirely, click the Delete  button.



Home District		Help
7/13/2022 - Current Home District: Home District A Home District Building: Building 12 Home District Student ID: Notes:		

When adding or editing a home district record, users have access to fields for home district building, home district student ID, and a free-text notes field.



Home District

Help

Start: 7/13/2022

End: Current

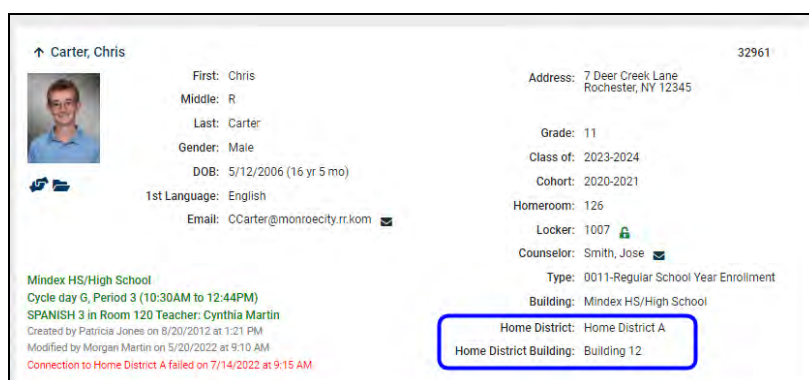
Home District: Home District A

Home District Building: Building 12

Home District Student ID:

Notes:

Users with permission to see the Home District field in the Personal Information section (at the top of each student record) will now see the home district building and home district student ID for any current home district assignments that include those fields.



Carter, Chris

First: Chris

Middle: R

Last: Carter

Gender: Male

DOB: 5/12/2006 (16 yr 5 mo)

1st Language: English

Email: CCarter@monroecity.rr.com

Address: 7 Deer Creek Lane
Rochester, NY 12345

Grade: 11

Class of: 2023-2024

Cohort: 2020-2021

Homeroom: 126

Locker: 1007

Counselor: Smith, Jose

Type: 0011-Regular School Year Enrollment

Building: Mindex HS/High School

Home District: Home District A

Home District Building: Building 12

Special Programs View

Special programs are used for students receiving services that are associated with a specific cost. These programs are defined in Maintenance and are typically used for BOCES billing purposes. Special programs may include yearly (e.g., 12:1:1 or 1:1 Aide

programs) or weekly (e.g., speech therapy or counseling) services.

A Special Program record as seen on the Student Tab

1. Select a school year, then choose a program from the drop-down (the list of programs is dependent on the school year selected; only programs that have a school year defined will appear in the list for that year).
2. Specify a start date (and end date, if appropriate).
3. Enter a Frequency to indicate the number of times per billing period (yearly or weekly) that the student receives these services.
4. Specify whether the student is receiving group or individual service.
5. Select a provider.
6. If appropriate, choose a faculty responsible for administering or overseeing the service (this field is optional).

Letters Tab

On the Letters tab of a Student Record, users will see the student's Attendance Letter history. The list is read-only unless the user has permission to delete letters or mark them as ignored, and may be sorted by any column. Users may view other years' Attendance Letters by using the drop-down menu.

Users with the appropriate permission may delete any letter from the Letters tab. If this permission is enabled, a Delete **✖** button will appear next to each letter in the list.

CONTACTS	SCHEDULE	ATTENDANCE	DISCIPLINE	GRADES	ASSESSMENTS	ASSIGNMENTS	LETTERS	NOTES
Student								
2021-2022								
	Type	Threshold Name	Threshold	As Of	Created On	Detail	Ignore	
✖	Daily	Minindex Daily Policy 1	4	2/10/2022	2/10/2022 3:5 PM		☐	

The Attendance Letters history shows the following information:

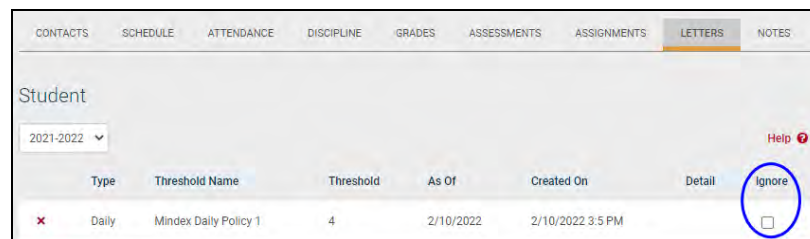
- **Type:** Displays the policy type that was used for that letter (this is determined based on the Attendance Policy settings in Maintenance). The values shown here may be Daily, Course, or Tardy, depending on the type of policy.

- **Threshold Name:** The name of the Attendance Policy stage that was used to generate this letter.
- **Threshold:** Shows the number of misses used for that particular Attendance Policy threshold.
- **As Of:** Reflects the date entered by the user when running the Attendance Letters search
- **Created On:** Displays the date on which the user actually generated that letter
- **Detail:** Provides details about the course for which the letter was run. The details, which are separated by commas, are Course ID, Course Name, and Section Number (SN), respectively.
- **Ignore:** When checked, a letter will be marked as “ignored” and SchoolTool will behave as though the letter was never sent. When a letter is ignored, the comment entered by the user as the reason for ignoring the letter will be displayed in a second row.

Details will only display when the policy Type is Course; if the Type is Daily or Tardy, the Details field will be blank.

Users with the appropriate permissions may mark a student's attendance letter as “ignored.” When a letter is marked as “ignored,” SchoolTool will keep the historical record to indicate that the letter was sent. However, when determining which students need attendance letters, SchoolTool will behave as though that particular letter was never sent.

To ignore an attendance letter, click the Ignore checkbox on the right side of the screen for the letter you wish to ignore.



In the pop-up window that appears, enter a brief comment to indicate a reason for ignoring the letter and click OK to continue.



Ignore Comment

Please enter a reason to ignore this letter:

OK CANCEL

When a letter is marked as “ignored,” the letter will display on the student's Letters tab in gray text. To remove the “ignore” status, simply uncheck the Ignore checkbox (this will also remove the comment).

CONTACTS

SCHEDULE

ATTENDANCE

DISCIPLINE

GRADES

ASSESSMENTS

ASSIGNMENTS

LETTERS

NOTES

Student

2021-2022

Help

Type	Threshold Name	Threshold	As Of	Created On	Detail	Ignore
 Daily	Mindex Daily Policy 1	4	2/10/2022	2/10/2022 3:5 PM		

corrected data

User Defined Tab

The User Defined tab is available on the Person Record for students, residents, or faculty. This tab displays any active user defined screens created in Maintenance. These screens are created and configured by the district and may contain any number of custom fields and field types. Select a user defined screen from the drop-down menu to view a list of all active records for that screen.

If the individual has data entered for any user defined screen, this information will appear in read-only mode on this tab. Click Show History to show all records for that screen, including inactive records. Users can also click the Print  button to generate a report of that person's user defined screens.

Users with Edit permission may add, modify, or remove records. To modify an existing record, click the Edit  button and modify as needed. Click the Delete  button to permanently remove a record.

To add a new record, select the screen from the drop-down menu and click the Add  button. A new record will open in edit mode. All required fields are highlighted in pink.

Enter information in each field as appropriate and Save  the record when finished. Field types are indicated for all fields except drop-downs, and may include any of the following field types:

- Drop-down List
- Text
- Real (real numbers; can include decimal points)
- Integer (whole numbers only)
- Date
- Checkbox (Yes/No)

Active fields, field types, drop-down content, and maximum field lengths are specified in Maintenance for each user defined screen. Refer to the Maintenance Module documentation for detailed information on configuring a user defined screen.

All records must have a Start Date, which is used to indicate the date the record became active. If an End Date is entered, that indicates the date that record expires. Once the End Date has passed, the record will become inactive and will be visible when a user clicks “Show History.”

The screenshot shows a web application interface with a top navigation bar containing tabs: CONTACTS, SCHEDULE, ATTENDANCE, DISCIPLINE, GRADES, ASSESSMENTS, ASSIGNMENTS, USER DEFINED (highlighted), HOURS, and NOTES. Below the navigation bar, the page title is 'Student'. Underneath, there is a dropdown menu set to 'Parking Assignments', followed by '+ Add', a printer icon, and a 'Help' link. A 'Hide history' link is also present. The main content area displays two entries for 'Parking Assignments':

- Entry 1:** 10/11/2022 - Current. Fields include: Application Date: 10/5/2021, Reviewed by (enter name): Carol N. Fitzhugh, Documents checked?: Yes, Approval Date: 10/6/2021, Lot Assignment: Senior Lot A, Permit Number: 1234, and Notes: Sticker valid as of Monday 10/11/2021, acceptance packet delivered in homeroom.
- Entry 2:** 9/27/2021 - 9/29/2021. Fields include: Application Date: 9/27/2021, Reviewed by (enter name): Carol N. Fitzhugh, Documents checked?: Yes, Approval Date: (empty), Lot Assignment: (empty), Permit Number: (empty), and Notes: Not approved - needs parent signatures and proof of insurance. Instructed to resubmit.

Notes Tab

Each person record contains a **Notes** tab where you can add other information about this person. For a student, you might add notes about club participation or record meetings with parents. This is also where Orders of Protection are added. Be careful about the confidentiality of the information you add, as some notes can be seen by all users.

Printing Student Notes

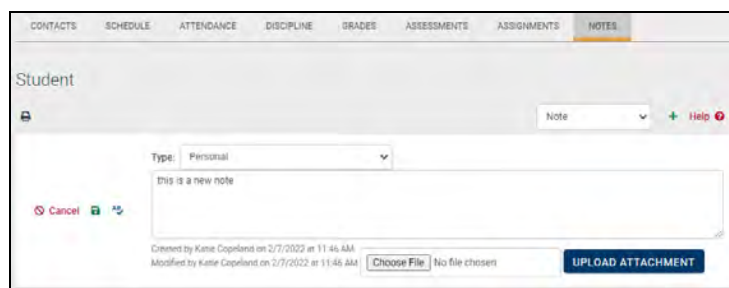
Users may print a report of all Student Notes listed on the Notes tab by clicking the Print  icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.

Student Note Report	
Billy Hall · Mindex HS · High School	
Type: Building Only, Passed With Promotion	
Created by Jerry Wootton on 8/7/2018 at 8:58:33PM	
Modified by Jerry Wootton on 8/7/2018 at 8:59:33PM	
Billy has been working to pass Math by attending extra tutoring sessions.	
Attachments:	

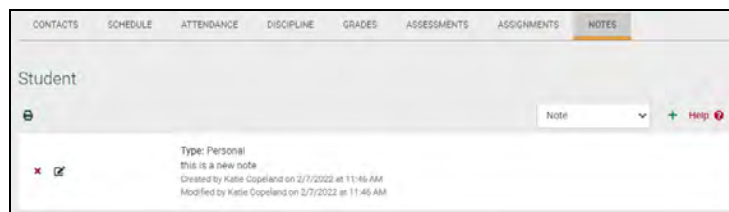
General Notes

1. Click once on the green Add Note **+** button.
2. Select a Note type. There are four (4) types of General Notes:
 - A. Global – which, when saved, are available to all SchoolTool users.
 - B. Building Only, Not Passed with Promotion – which become a part of the student's record only until he/she advances to the next building. Notes are only visible for the student's most recent official enrollment location.
 - C. Building Only, Passed with Promotion – which, when saved, become a part of the student's record and remain as he/she advances to the next building.
 - D. Personal – which are only available to the user that entered the note.
3. Enter the note content in the free-text area. This field will accept up to 1,000 characters.



The screenshot shows the 'Add Note' form in the SchoolTool interface. The 'Type' dropdown is set to 'Personal'. The text area contains 'this is a new note'. The 'Created by' and 'Modified by' fields show 'Katie Copeland' with timestamps. There are 'Cancel', 'Choose File', and 'Upload Attachment' buttons.

4. Add any supporting documents by clicking once on the Browse button and locating a file on the hard drive. Files may be any format (Word documents, spreadsheets, HTML, emails, etc), and there is no limit to the number of attachments which may be included. Once a file is located, it must be uploaded to SchoolTool in order for it to be saved with this note.
5. Once the Note is saved, the tab will refresh showing the notes in read-only mode.



The screenshot shows the 'Notes' tab for a student in the SchoolTool interface. The 'Type' dropdown is set to 'Personal'. The text area contains 'this is a new note'. The 'Created by' and 'Modified by' fields show 'Katie Copeland' with timestamps. There are 'Cancel' and 'Upload Attachment' buttons.

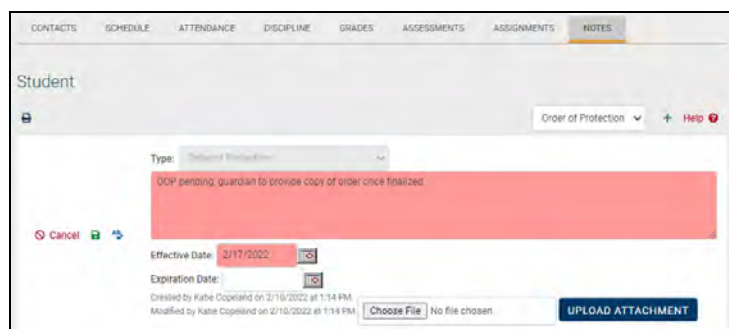
6. The Notes tab title will display a green circle to indicate that “new” notes exist on that student's record. Notes are considered new for a specified number of days after they have been created or modified, as defined by the district.

The Notes tab title will display a red circle when an active Order of Protection note exists, regardless of whether or not new notes exist.

7. Use the Delete  and Edit  buttons to remove or make changes to existing notes.

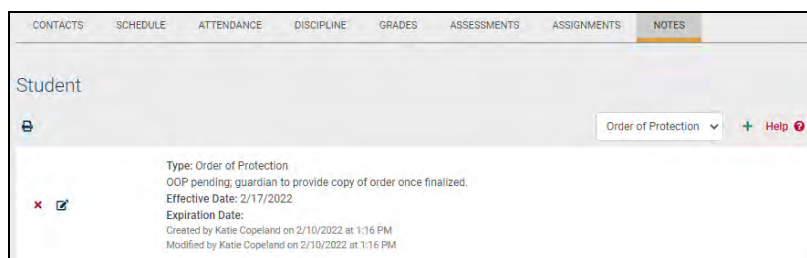
Orders of Protection

1. Select Order of Protection from the drop-down list at the right of the tab.
2. Click once on the green Add Note  button. An Order of Protection record will appear.



The screenshot shows the 'Student' page with the 'NOTES' tab selected. A dropdown menu is open, showing 'Order of Protection' selected. Below the dropdown, there is a red box with the text 'Type: Order of Protection' and 'OOP pending: guardian to provide copy of order once finalized.' To the left of the red box are 'Cancel' and 'Save' buttons. Below the red box, there are fields for 'Effective Date' (2/17/2022) and 'Expiration Date'. At the bottom, there is a 'Choose File' button and an 'UPLOAD ATTACHMENT' button. The form also displays 'Created by Katie Copeland on 2/10/2022 at 1:14 PM' and 'Modified by Katie Copeland on 2/10/2022 at 1:14 PM'.

3. Complete the Order of Protection:
 - A. Type a free-text description (required) of the order in the box under the word Type.
 - B. Enter an Effective Date (required). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
 - C. Enter an Expiration Date (if any). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
 - D. Attach any digital supporting documents by using the Browse and Upload Attachment buttons.
4. Click once on the green Save  button to the left of the description comments box.



The screenshot shows the 'Student' page with the 'NOTES' tab selected. The 'Order of Protection' record is now saved and displayed. It includes the 'Type: Order of Protection', the description 'OOP pending: guardian to provide copy of order once finalized.', the 'Effective Date: 2/17/2022', and the 'Expiration Date'. The audit tracking information is also visible: 'Created by Katie Copeland on 2/10/2022 at 1:16 PM' and 'Modified by Katie Copeland on 2/10/2022 at 1:16 PM'. To the left of the record, there are 'Edit' and 'Delete' buttons.

Once the Order of Protection has been saved, the Notes tab will display a red circle, alerting users that there is an Order of Protection for this student.

Orders of Protection can be Edited  and Deleted  as necessary.

The Created By and Modified By audit tracking will update as users add and update this information.

Printing Student Notes

Users may print a report of all Student Notes listed on the Notes tab by clicking the Print  icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.

Student Note Report	
Billy Hall · Mindex HS · High School	
Type: Building Only, Passed With Promotion	
Created by Jerry Woolton on 8/7/2018 at 8:59:11PM	
Modified by Jerry Woolton on 8/7/2018 at 8:59:33PM	
Billy has been working to pass Math by attending extra tutoring sessions.	
Attachments:	

Transferring Student Data

Districts have the ability to export student data via three (3) different methods. These methods are controlled by permissions, and may require additional configuration before they can be used.

Note: To use the Transmit to District feature to send student data to another district, your district must configure a connection in the **Maintenance > Application > District Connections** area for the receiving district.

To begin, locate a student record and click the Transfer Student Data  icon in the upper right corner of the student's personal information section.

Person


[← Back](#)
[Help ?](#)

[MY HOME](#)
[CENSUS](#)
[SCHEDULING](#)
[MEDICAL](#)
[DISCIPLINE](#)
[ATTENDANCE](#)
[COUNSELING](#)
[TRANSPORTATION](#)

↑ Allen, James



First: James (He/His)

Middle: A

Last: Allen

Gender: Male

DOB: 11/5/2006 (15 yr 11 mo)

1st Language: English

Email: JAllen@yooahoo.com

Address: 12 E Island Road
Rochester, NY 12345

Phones: H: (555) 531-6786

Grade: 10

Class of: 2023-2024

Cohort: 2020-2021

Homeroom: 163

Locker: 3058

Counselor: Williams, Melissa

Type: 0011-Regular School Year Enrollment

Building: Mindex HS/High School

Cycle day B, Period 4 (12:48PM to 11:59PM)

EARTH SCIENCE R in Room 180 Teacher: Richardson/Campbell

Created by Heather Henderson on 2/24/2020 at 2:25 PM

Modified by Morgan Martin on 5/20/2022 at 9:09 AM

Depending on your permissions, you will see one or more of the following options for data transfer. For all three options, the receiving district (to which you plan to send the student data) must also be using SchoolTool. Users can verify that a district is using SchoolTool by clicking on the “Find SchoolTool District” button and searching for the district by name. Refer to the section on *Finding a SchoolTool District* for details on how to search for a district.

The screenshot shows a web interface titled "Transfer Student Data". It has three main sections: "Export to File", "Send by Email", and "Transmit to District". Each section has a "Passkey" input field and a corresponding action button. The "Export to File" section has a "SAVE FILE" button. The "Send by Email" section has "To:", "Subject:", and "Body:" input fields, followed by a "SEND EMAIL" button. The "Transmit to District" section has a "District:" dropdown menu showing "Certification 16" and a "TRANSMIT" button. In the top right corner, there are links for "Back" and "Help".

Export to File

Use this option to save the student’s information to a local file. This will save an encrypted copy of the student’s information. This file can then be saved to a disk or emailed as an attachment to another district for processing.

- **Passkey:** For security reasons, it is required that users define a passkey for the file and provide that passkey to the district receiving the file; the recipient will then need to enter that passkey in order to view and process the student’s data. The passkey must be alpha-numeric and may contain up to 10 digits.

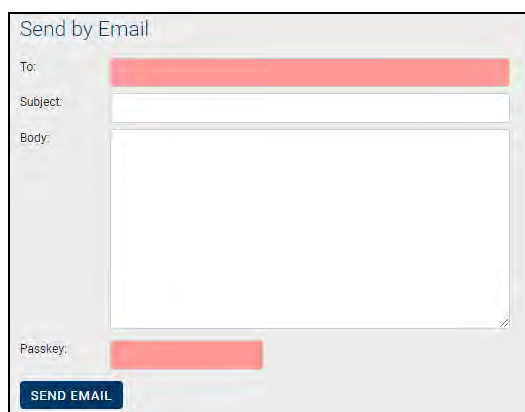
This is a close-up of the "Export to File" section from the main interface. It shows the "Export to File" title, a "Passkey:" label, a redacted input field, and a blue "SAVE FILE" button.

Send by Email

Use this option to automatically email the student’s data to another district. Enter the recipient email address(es), a relevant subject and/or body for the email. Recipient

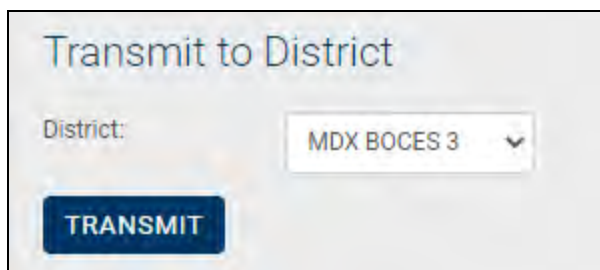
email and subject are required fields. Emails will be sent using the logged in user's email address. Users will automatically receive a copy of the email that was sent.

- **Passkey:** For security reasons, it is required that users define a passkey for the file and provide that passkey to the district receiving the file; the recipient will then need to enter that passkey in order to view and process the student's data. The passkey must be alpha-numeric and may contain up to 10 digits.

A screenshot of a web form titled "Send by Email". It contains four input fields: "To:" (a red text box), "Subject:" (a white text box), "Body:" (a large white text area), and "Passkey:" (a red text box). At the bottom left of the form is a blue button labeled "SEND EMAIL".

Transmit to District

Use this option to send data to another SchoolTool district using a District Connection defined in Maintenance.

A screenshot of a web form titled "Transmit to District". It features a "District:" label followed by a dropdown menu showing "MDX BOCES 3" with a downward arrow. Below this is a blue button labeled "TRANSMIT".

Depending on district connection settings, you may be prompted to enter additional student information (and/or course selections) if it has been requested by the receiving district.

Use the checkboxes at the top of the screen to select the user defined screens you wish to add to the transmission. All checked items will be sent to the receiving district (fields marked with an asterisk are required if that UDS is checked at the top of the screen) when the student is transmitted. Any UDS marked as Required will be automatically selected (checked) and cannot be unchecked. Users will be unable to complete the data transfer until all required fields are completed for each required UDS.

Note: Please be aware that some functionality related to Transfer Students and District Connections is only supported when both districts are using the same version of SchoolTool.

Additional Information Requested

Additional Information for Arthur Jones

☒ Course Selection ☐ Parking Assignments

Course Selection

School Level: Select One

Course Selections: Select One +

TRANSMIT

Help ?

After completing the appropriate fields, click the Transmit button to send the student data.

When the student is accepted and processed at the receiving district, a home district record may be created for this student which will include the Student ID from the receiving district.

Finding a SchoolTool District

Users can quickly look up a specific school district to see if that district uses SchoolTool to verify that the recipient will be able to open the transferred file.

To look up a SchoolTool district, click on the District Search  icon in the upper right corner.

The District Search area will open in a pop-up.

Enter the beginning of the name of the school district you wish to find. Once you have entered four or more characters, the results will automatically appear.

Please note that this search requires a minimum of four characters and only locates schools based on the *beginning* of the school name. Therefore, if you wish to search for “East Mindex CSD” you would need to enter “East” (searching for “Mindex” or “CSD” would not return any results).

District Search

District Begins With:

east

East Hampton UFSD

East Rochester UFSD

East Syracuse-Minoa CSD

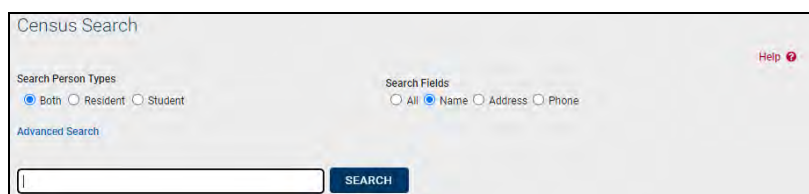
Eastport-South Manor CSD

Help

CLOSE

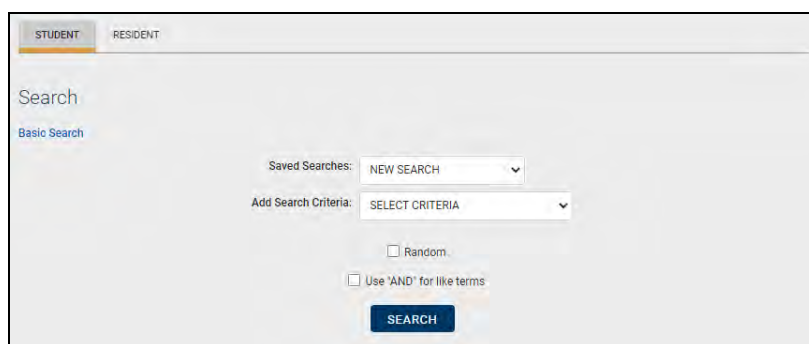
Census > Census Search

The Census Search sub-module allows users to search for students, district or non-district residents, or both , by using the Basic Search function. Users may use the “Search Fields” radio buttons to limit their searches by searching only on specific fields.

The screenshot shows the 'Census Search' interface. At the top left is the title 'Census Search'. Below it, under 'Search Person Types', are three radio buttons: 'Both' (selected), 'Resident', and 'Student'. To the right, under 'Search Fields', are three radio buttons: 'All' (selected), 'Name', 'Address', and 'Phone'. There is a 'Help' link with a question mark icon in the top right corner. Below the radio buttons is a text input field and a blue 'SEARCH' button.

This screen will remember the most recent Search selections (Search Person Types and Search Fields) you made in Basic Search mode and will pre-select them the next time you access this screen.

The Advanced Search feature allows users to search using the Batch Selector. Clicking on the Advanced Search link will bring the user to a page containing two tabs (Student and Resident) which each contain a Batch Selector feature.

The screenshot shows the 'Advanced Search' interface. At the top, there are two tabs: 'STUDENT' (selected) and 'RESIDENT'. Below the tabs is the title 'Search'. Under 'Basic Search', there is a 'Saved Searches:' dropdown menu with 'NEW SEARCH' selected. Below that is an 'Add Search Criteria:' dropdown menu with 'SELECT CRITERIA' selected. There are two checkboxes: 'Random' and 'Use AND for like terms', both of which are unchecked. At the bottom is a blue 'SEARCH' button.

Modifying a Person Record

If you are familiar with adding contacts and students to SchoolTool, modifying those records is a similar task. You will do a simple search to locate the record of the person to be modified, make changes using the edit buttons on the various parts of the person record, and then save your work. Because SchoolTool is a real-time database, your changes will be available to other users immediately.

1. Search to find the person using the **Census Search** sub-module. If the person is not found, refer to the section on the Add Person Sub-module.

Census Search

Search Person Types
☒ Both ☐ Resident ☐ Student

Search Fields
☐ All ☒ Name ☐ Address ☐ Phone

Advanced Search

Turner SEARCH

310 matches found

1 2 3 4 5 6 7 8 9 10 ...

First Name	MI	Last Name	Address	Phone	ID	Age	Grade	Homeroom
> Alan	D	Turner	7 Highway 89 Rochester, NY 12345	C: (555) 431-9978 W: (555) 431-4913 H: (555) 492-8901				
> Albert	L	Turner	2 Opager Drive Rochester, NY 12345	H: (555) 529-8945	39461	9	4	255
> Alice	N	Turner	Rochester, NY 12345	H: (555) 465-1311 C: (555) 429-2469				
> Amanda	M	Turner	115 Cindy Lane Rochester, NY 12345	H: (555) 425-3280	5840	22		

- Assuming the person is found and a list results, select the person from the list. The screen will refresh with the person's information tabs.
- Use the Edit  buttons to edit information:

Person

MY HOME **CENSUS** SCHEDULING MEDICAL DISCIPLINE ATTENDANCE COUNSELING TRANSPORTATION

Turner, Patrick 27059

First: Patrick
 Middle: M
 Last: Turner
 Gender: Male
 DOB: 10/8/2004 (18 yr 0 mo)
 1st Language: English
 Email: student@mdx.com

Mailing: 287 Antique Lane
 Rochester, NY 12345

Grade: 12
 Class of: 2021-2022
 Cohort: 2018-2019
 Homeroom: 206
 Locker: 3138
 Counselor: Roberts, Angela
 Type: 0011-Regular School Year Enrollment
 Building: Mindex HS/High School

Cycle day G, Periods 3 to 4 (10:30AM to 11:59PM)
 12:1-1 in Room Teacher:
 Created by Patricia Jones on 5/11/2009 at 4:48 PM
 Modified by Katie Copeland on 10/7/2022 at 12:10 PM

- In the Personal Information section (the main upper portion of the person record), an Edit  button appears in the upper right corner if the user has permission to Edit a person record. Use this to edit the person's name, cell phone, email or other information as appropriate.

Notes:

- The ability to edit fields in the Personal Information Section is controlled by user permissions. Because separate security rights exist for each field, not all users will be able to edit all fields here. Fields that may not be edited appear in read-only

mode on the screen when in edit mode.

- When specifying legal and affirmed name for students, it is important to note that the name shown to a contact may vary depending on that contact's relationship settings. Refer to this [list of locations](#) that currently respect the "Contact Display Name" setting.

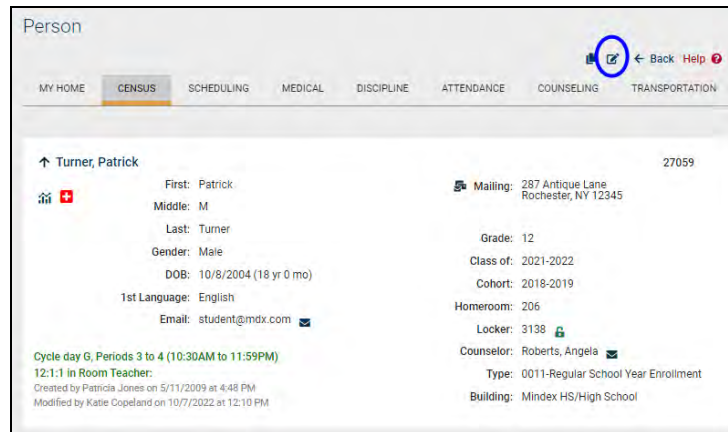
- B. On the **Contacts** tab, use the Edit button to edit the contact relationships.
- C. On the **Demographics** tab, use the Edit button to edit details such as proof of birth, marital status, citizenship, voter registration, etc.
- D. To edit addresses found in the **Addresses** tab, refer to the [Addresses Tab](#) documentation.

4. Make any changes on the resulting screens.
5. Save your work by using the Save buttons which are typically located in the upper right corner of each record/tab, but may occasionally be set to the left of a field.

Delete a Person (Student)

Note: Deleting a record is an action that *cannot be undone*. Be sure that this is necessary before proceeding with the following steps.

1. Search to find the person using the **Census Search** sub-module. If the person is not found, refer to the section on the Add Person Sub-module.
2. Assuming the person is found and a list results, select the person from the list. The screen will refresh with the person's information tabs.
3. In the main upper portion of the person tab, click on the Edit  button in the upper right corner.



Person

MY HOME CENSUS SCHEDULING MEDICAL DISCIPLINE ATTENDANCE COUNSELING TRANSPORTATION

Turner, Patrick 27059

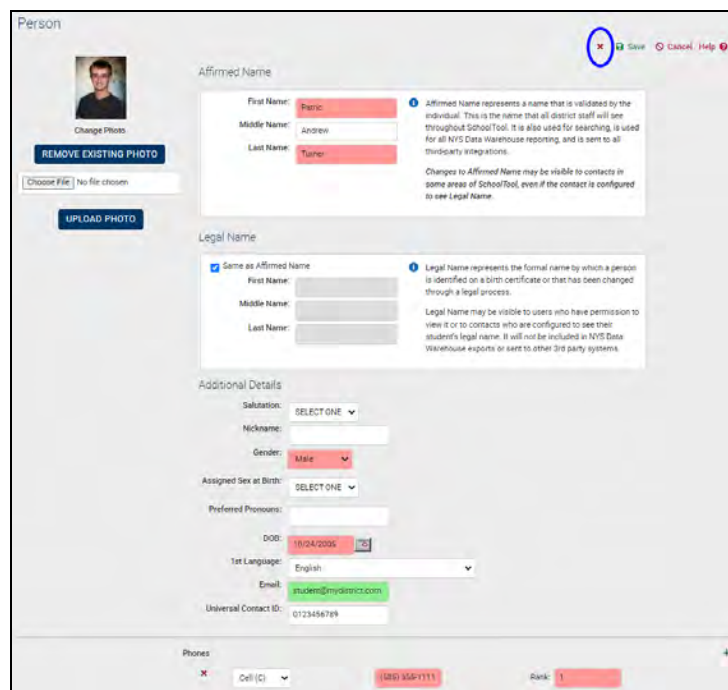
First: Patrick
Middle: M
Last: Turner
Gender: Male
DOB: 10/8/2004 (18 yr 0 mo)
1st Language: English
Email: student@mdx.com

Mailing: 287 Antique Lane
Rochester, NY 12345

Grade: 12
Class of: 2021-2022
Cohort: 2018-2019
Homeroom: 206
Locker: 3138
Counselor: Roberts, Angela
Type: 0011-Regular School Year Enrollment
Building: Mindex HS/High School

Cycle day G, Periods 3 to 4 (10:30AM to 11:59PM)
12:1:1 in Room Teacher:
Created by Patricia Jones on 5/11/2009 at 4:48 PM
Modified by Katie Copeland on 10/7/2022 at 12:10 PM

4. The screen will refresh and the record will open in Edit mode. Click on the Delete  button to remove the record.



Person

Change Photo
REMOVE EXISTING PHOTO
Choose File No file chosen
UPLOAD PHOTO

Affirmed Name

First Name: Patrick
Middle Name: Andrew
Last Name: Turner

Legal Name

☒ Same as Affirmed Name

First Name:
Middle Name:
Last Name:

Additional Details

Salutation: SELECT ONE
Nickname:
Gender: Male
Assigned Sex at Birth: SELECT ONE
Preferred Pronouns:
DOB: 10/08/2004
1st Language: English
Email: student@mdx.com
Universal Contact ID: 0123456789

Phones

Cell (C) (US) 350/1111 Rank: 1

5. You will be asked to confirm the deletion. Click OK to delete the record.

Census > Add Family

This sub-module allows for the entry of an entire family into the database, including up to two (2) adults, four (4) students and a residence address, all on a single form. For families with more than four children, use this form to create the family (including the first four children), then navigate to the primary contact's record and add any additional child contacts to the family as needed.

Once this information has been entered, verified, and accepted by SchoolTool, specific details such as student enrollment information may be entered simply by navigating to the appropriate records.

Adding an Entire Family

1. Navigate to **Census > Add Family**.
2. Fill in the fields with the appropriate information.
3. The Add Family form consists of three sections, one each for Contacts, Students, and Residence Address. Fill out each area:
 - A. Contacts – Enter the name(s) of the first two adults living with the student(s). The first contact will be considered the primary contact, and is the only required contact.

	Salutation	First Name	Middle Name	Last Name	Gender
1	SELECT ONE				SELECT ONE
2	SELECT ONE				SELECT ONE

- First Name, Last Name, and Gender are all required fields.
 - Enter the contact's names precisely according to district policy. Any deviations may cause duplicate records to be created.
- B. Students – Enter up to four students that are members of this family. Only one student is required.

	First Name	Middle Name	Last Name	DOB	Contact 1	Contact 2	Gender	Language
1					Select One	Select One	SELECT ONE	English
2					Select One	Select One	SELECT ONE	English
3					Select One	Select One	SELECT ONE	English
4					Select One	Select One	SELECT ONE	English

- All fields except Middle Name are required: First Name, Last name, DOB, Gender, Language, and Contact 1 must all contain data.
- Contact 1 and Contact 2 determine the relationship the student has with the two contacts above. If only one contact was entered (the primary), then Contact 1 is the only required contact field.
- If you need to enter separate values for affirmed and legal names, complete the Add Person process first, then locate the person's record and edit it from within the Census module to update the individual's names.

C. Address – Enter the address where the family currently lives. This may be different from the mailing address.

- You must enter a house number, street name, or unit number in order to search for potentially existing addresses.
- Providing partial details will return a list of all possible matches, so providing too little information may cause an unwieldy number of addresses to appear on the following confirmation screen.
- When entering data in these fields, be only as specific as is necessary. For instance, instead of entering "215 Main St", enter simply "215 Main." This will help to prevent duplicate records (e.g., "215 Sylvan Street" vs. "215 Sylvan St").

4. Click on the Continue button
5. If there is missing data, error messages will display at the top of the screen (it may be necessary to scroll up to see them) and the form will remain on-screen.

- Contact 1 is incomplete.
 - Student 1 is incomplete.

6. If all of the appropriate information has been entered as required, the user will be presented with a confirmation screen that will provide informational and/or warning messages. This screen will also allow a user to modify the Add Family

form before continuing.

7. Examine the Confirmation screen
 8. The confirmation screen is divided into the same three sections as the Add Family screen: Contacts, Students, and Address. Each area will contain confirmation messages (in green), warning messages (in red) or selectable options (for addresses only).
- A. Confirmation messages – Confirmation messages will always say, "XXX will be created." This message is used when entered data is not already found in the SchoolTool, and a new record will be created.

- 'Michael Jones' will be created.
 - 'Maria Jones' will be created.

- B. Warning messages – You may see a warning that a record resembling the entered data already exists, and that continuing with the operation will create a duplicate entry.

This may be acceptable, but such messages should be investigated, as the family may already have been entered into SchoolTool.

• A person named "Patrick Richard Turner" and with DOB "3/7/2004" already exists. Continuing will create a duplicate person.

- C. Address Options – Multiple options may be available to a user. If the address that was entered on the previous screen is new to SchoolTool, then the only available option will be to add the address to SchoolTool.

If other addresses match the user's entry on the previous screen, a dropdown will exist that will allow the user to select an existing address that matches the entered information.

Note that the address should be fully entered before moving from this screen.

Choose Modify or Continue

- A. **Modify** – Select this option to return to the previous Add Family screen to modify or view the information in any of the sections. Once changes are complete, the user will be returned to this page. No changes will be saved when this button is selected.
 - B. **Continue** – Select this button to commit all changes to the SchoolTool database. Read all confirmation and warning messages before clicking on this button!
9. After clicking the Continue button, the data will be submitted and a confirmation message will appear indicating that all data has been committed

(saved) to the database. The screen will also display a list of all person records that were added for that family, including columns for Salutation (for adults), the person's full name, Student ID (for students), and whether the person is an Adult or a Child in the newly added relationship.

Family created successfully.

Family Members:

	Salutation	Name	Student ID	Adult or Child
>	Mr.	Jones, Michael		Adult
>		Jones, Adam	80123	Child

- A. Clicking on the Select > button for any of these records will take the user directly to that individual's Personal Information Record in Census, where the user may update any information as appropriate.

Census > Add Person

Which came first, the parent or the student? In SchoolTool, either can come first, and there is no wrong way!

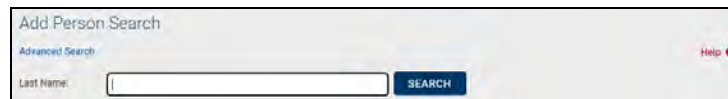
Instead of creating a family unit with a single ID number, which contains parents and children, and which is difficult to dissect if parents divorce and remarry, SchoolTool links all adult guardians for a student to that individual student record. This allows for diverse family situations.

As families change, all contact relationship maintenance is done through the individual student's record, making tasks quicker and easier, and ensuring each student has the most up to date, relevant information for him/her.

The **Census > Add Person** sub-module can be used to create any new Person Record. From here, you can create a Resident, which is anyone who is not a student. This may include any adults, such as parents, guardians, or other contacts (emergency contacts, relatives, etc.).

Add a New Person Record

1. From within the Census module, click once on the **Add Persons** sub-module from the menu at the left. The screen will refresh with the Add Person Search tab.



2. Search first, to make sure the person is not already in the database. Enter the person's last name in the search field. Be sure to spell it correctly.
3. Click once on the Search button. If no results are found, the Person tab will open, where you can add a Person.

Note: If a match is found, a person with the same name is already in the database, or the name may be spelled wrong. Verify that you are not adding a duplicate record before proceeding.



4. Add the person's basic information. The only required fields are the First and Last Names, and the Last Name will default to your search criteria. If you need to enter separate values for affirmed and legal names, complete the Add Person process first, then locate the person's record and edit it from within the

Census module to update the individual's names.

Important Note: Students must have a **Gender, DOB, and 1st Language** in order to be enrolled.

5. If you are adding a **Student**, enter the following information. These five fields are required to enroll a student.

- A. All five fields must be completed in order to enroll a student.

- i. First Name – this is a required, free-text field.
 - ii. Last Name – this is a required, free-text field.
 - iii. Gender – choose an option from the dropdown (this is required to enroll a student).

Note: Keep in mind that students must have a gender selected; failure to select a gender will cause reporting issues for NYS Data Warehouse. SchoolTool will allow you to save a new person record with a gender of "Not Specified", but after this individual is enrolled as a student users will be prompted to select a gender on subsequent edits of the student's information in Census.

- iv. DOB (date of birth) – enter the date manually in the mm/d-d/yyyy format, or use the pop-up calendar.
 - v. 1st Language – select from the drop-down list. English is at the top.

- B. Enter any additional information in the optional fields.

- i. Some fields are set in Maintenance as district preferences or permissions. Contact your SchoolTool liaison for additional information if needed.
 - ii. You may also add a student photograph by browsing to the appropriate file and uploading the photo.

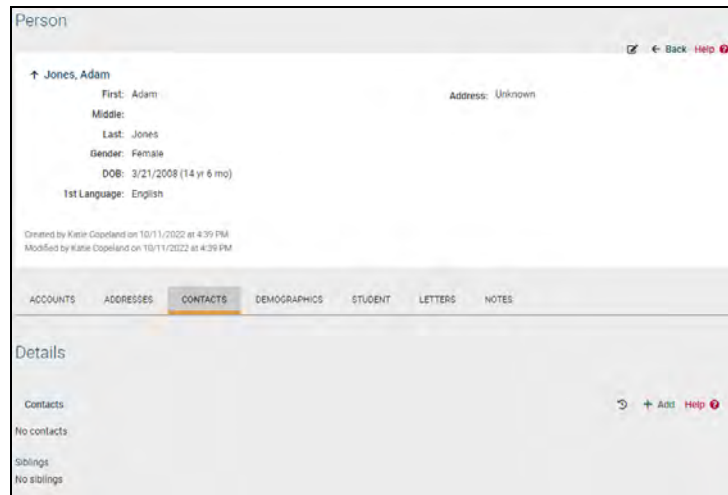
Note: It may take up to an hour before photos are updated on all servers. Typically changes will be visible on the local server immediately, but new or modified photos are not updated in the photo cache until SchoolTool runs its automatic hourly photo update process.

Note: Supported image formats for photos include JPEG, PNG, BMP, and TIFF files. Photo file sizes greater than 300x300 will automatically be compressed to fit this size.

6. If you are adding a **Resident** (adult/non-student), enter the First Name and Last Name. Enter additional information as appropriate.

Note: Even if you have Date of Birth and First Language information, it is not advised that you log or track that in SchoolTool for an adult. These fields are to be used for NYS reporting for students only.

7. When you have finished adding information, click once on the green Save  button to save this person's record to the database. The Person tab will refresh to show you the record in view-only mode, with additional tabs at the bottom where more information can be entered.



The screenshot shows the 'Person' record for Adam Jones. The top section displays the name '↑ Jones, Adam' and a 'Save' button. Below this, fields for 'First: Adam', 'Middle:', 'Last: Jones', 'Gender: Female', 'DOB: 3/21/2008 (14 yr 6 mo)', and '1st Language: English' are visible. The 'Address: Unknown' field is also present. A timestamp indicates the record was created and modified by Karin Copeland on 10/11/2022. A horizontal tab bar at the bottom includes 'ACCOUNTS', 'ADDRESSES', 'CONTACTS' (which is highlighted), 'DEMOGRAPHICS', 'STUDENT', 'LETTERS', and 'NOTES'. Below the tabs, the 'Details' section shows 'Contacts' with a '+ Add' button and 'Siblings' with 'No siblings' listed.

8. When you have finished completing the student details, click once on the Save  button in the upper right corner of the Person screen. The screen will refresh with the new person record in read-only mode.
9. Once the basic information for this contact has been added, you can use the various Census tabs on the Person Record to enter additional information such as enrollments (for students), addresses (for residents or emancipated students), notes, etc. Person Records (non-student records) contain tabs for Addresses, Contacts, Demographics, Student (this displays information about the students who are linked to this contact) and Notes.

Note: If you need to edit any part of what was just added, you can use the Edit  button in the upper right corner. See the procedure for Modifying a Person Record for more information.

10. Once the person record has been created, you may perform any related tasks.
 - A. Student tasks may include the following:
 - i. Enroll the student (Census > Student Tab)
 - ii. Add any Program Service records (Census > Student Tab)
 - iii. Link Contacts to the student, which will give the student an address (Census > Contacts Tab)
 - iv. Add Demographics information (Census > Demographics)

- B. For residents, you may now add addresses and/or link students to this contact.

Census > Batch Edit Demographics

The **Census > Batch Edit Demographics** sub-module allows users to modify any single field on an enrollment record for a group of students.

To use the Batch Edit Demographics feature:

1. Use the batch selector to locate the group of students to be changed. A drop-down will appear with a list of all fields that can be edited on the Demographics tab from within a student record.
2. Once a field has been selected, corresponding options will appear (these may include radio buttons, drop-downs, or text fields).
3. Specify the new value for that field and click the Save  button to apply the change. The field will be changed to the new value for all selected students.

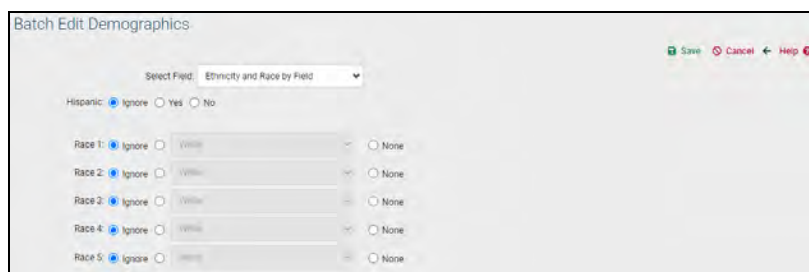
Note: To remove a value from a specific field, select the “None” option. Once the change is applied, this field will be cleared for all selected students.

4. Once the operation is complete, a message will appear to indicate the number of records that were modified. If any student could not be changed, a second message will be displayed indicating the number of errors and a list of those students will be provided below the message.

Special Notes Regarding Workflow for Ethnicity and Race Fields

Students’ race (formerly labeled as “ethnicity”) fields may be modified using one of two possible methods: by field, or by value. In either method, users may select a value for the Hispanic radio buttons to specify the group of students as Hispanic or Not Hispanic (to modify race fields only, use “Ignore” for this option).

Ethnicity and Race by Field:



The screenshot shows the 'Batch Edit Demographics' window. At the top, there is a 'Select Field' dropdown menu set to 'Ethnicity and Race by Field'. Below this, there are radio buttons for 'Hispanic' (selected), 'Ignore', 'Yes', and 'No'. Underneath, there are five rows for 'Race 1' through 'Race 5'. Each row has a blue radio button (selected), an 'Ignore' radio button, a text input field, and a 'None' radio button. The 'None' radio buttons are currently selected. In the top right corner, there are buttons for 'Save' (green), 'Cancel' (red), and 'Help' (blue).

- Use the five race fields to specify one or more races for all selected students.
- Use the “None” option to clear that particular race field for those students.
- Race fields set to “Ignore” will not be modified.

Ethnicity and Race by Value:



- To replace all instances of a specific race with another value, use the drop-downs to select the appropriate values.
 - The first dropdown (“Replace”) contains all possible race values, including those designated as inactive.
 - The second dropdown represents the value to which the current race will be changed,
 - For example, to change all students who previously had a race value of “Hispanic” to “White,” select “Hispanic” in the first list and select “White” in the second. All race fields that contain a value of “Hispanic” will be modified to “White” for the selected students.
- When modifying race fields using either method, duplicate values will be purged.
- Since a primary race is required for all students, if a value is removed from the Race 1 field for any student, the next available race value will be used as the new primary race. In addition, changes will not be made if the selected changes would result in a student having all race fields cleared.

Census > Batch Enrollment

Use the **Batch Enrollment** sub-module to change enrollment start dates, add projected or alternate enrollments, and remove projected or alternate enrollments. Users can also view job history for batch actions performed from within this sub-module.

The screenshot shows the 'Batch Enrollment' interface. At the top, there's a header with the title 'Batch Enrollment' and a 'Help' icon. Below the header, there's a list of actions: 'Enrollment Start', 'Add Projected Enrollment', 'Remove Projected Enrollment', 'Add Alternate Enrollment', and 'Remove Alternate Enrollment'. Each action has a right-pointing chevron icon. Below the list, there's a section for 'Show jobs from previous:' with a dropdown menu set to '1 Month'. Below this, there's a table with columns: 'Description', 'Status', 'Start Time', and 'End Time'. The table contains two rows of job history. Each row has a 'Show Results' link with a downward-pointing chevron icon.

Description	Status	Start Time	End Time
Batch Add Alternate Enrollment	Completed	10/16/2024 10:38:44 AM	10/16/2024 10:38:45 AM
Batch Remove Alternate Enrollment	Completed	10/16/2024 10:40:25 AM	10/16/2024 10:40:26 AM

- To modify a batch of projected enrollment start dates and transfer projected enrollments to official enrollments, Select ➤ the Enrollment Start option.

Enrollment Start

1. Navigate to **Census > Batch Enrollment** and select Enrollment Start.

This screenshot shows the 'Batch Enrollment' interface with the 'Enrollment Start' option highlighted by a blue box. The other options are 'Add Projected Enrollment', 'Remove Projected Enrollment', 'Add Alternate Enrollment', and 'Remove Alternate Enrollment'.

2. The Enrollment Start screen will appear with a list of students who have projected start dates for the selected School Year.

Student ID	Last Name	First Name	From Provider	From Grade	To Provider	To Grade	Start Date	HR	Counselor
41160	Carler	Jack	Mindez ES1/Elementary	3	Mindez HS/High School	9	10/12/2022	173	Jones, Amanda
43527	Davis	Heleen	Mindez ES1/Elementary	2	Mindez HS/High School	9	10/12/2022	181	Martinez, Patricia
47249	Dixon	Linda	Mindez ES1/Elementary	5	Mindez HS/High School	9	10/12/2022	152	Jones, Amanda
43562	Edwards	James	Mindez ES1/Elementary	1	Mindez HS/High School	9	10/12/2022	181	Martinez, Patricia
39168	Hernandez	Mary	Mindez ES1/Elementary	4	Mindez HS/High School	9	10/12/2022	173	Martinez, Patricia

3. Select the radio button for In District, Out of District, or Select Students as appropriate.
 - A. When the In District option is selected, users may select a specific Building and School Level, or may choose "All" to include all possible Buildings and/or School Levels.
 - B. When the Out of District option is selected, users may select the appropriate school year, exit reason, and enrollment start date. Only students with Out of District projected enrollments will be displayed.
 - C. When the Select Students option is selected, users may use the batch selector to locate a group of students for whom they wish to activate projected enrollments.
4. Choose a school year from the drop-down to locate students with projected enrollments for that year.

Note: Notice that the table lists each student's current provider and grade, as well as their destination provider and grade based on existing official enrollments and projected enrollments.

5. Select the Building, and School Level where the selected student (s) will be enrolled (in district enrollments only).
6. Select an exit reason to be applied to any students with current official enrollments.
 - A. If the "Use Projected Enrollment Exit Reason" option is checked, projected enrollments will be ended with the exit reason specified in the projected enrollment, rather than the exit reason selected on the Enrollment Batch Start screen. Projected enrollments that do not have an exit reason will be ended with the exit reason selected on this screen.

7. Select the appropriate student(s) whose enrollment(s) will begin on the specified date by checking the boxes to the left of each name.
8. Verify the Enrollment Start Date is today or a date in the past. You cannot rollover a projected enrollment to a date in the future.
9. After clicking the Save  button, the job will run immediately. Users will see the status of the job as it runs and any errors that may have been returned.



Description	Status	Start Time	End Time
Batch Enrollment Start	Completed	10/11/2022 4:28:57 PM	10/11/2022 4:28:58 PM

[Hide Results](#)
 Batch Enrollment Start
 Student: 8 of 8 (100%)

Student Name Student ID/Email Message
 Carter, Jack 41160
 Davis, Helen 41207
 Davis, Linda 47249
 Kennedy, Daniel 41217
 Martinez, Patrick 44369
 Moore, Joseph 39831
 Myers, Shelly 41178
 Robinson, Donald 44365

10. Users may review the history of these jobs from the Job Object History area on the **Census > Batch Enrollments** screen.

Note: You may edit this enrollment as needed. For more information, refer to the Editing an Official Enrollment section.

- To add a batch of projected enrollments, Select [Add Projected Enrollment](#) option.

Add Projected Enrollment

1. Navigate to **Census > Batch Enrollment** and select Add Projected Enrollment.



2. The Add Projected Enrollment screen will refresh with the Projected Enrollment Screen.

3. Select the following information: Enrollment, School Year, Start Date, Date Registered, Provider, Grade, Alternate Reported Grade, Class, Homeroom, Counselor, and Diploma. You can check the "Is Placed" and "Include in Rank" checkboxes if applicable.
4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to add the projected enrollment to and deselect any you do not want included.
6. Click the green Add button at the top of the screen.
7. The screen will refresh indicating the results.

Description	Status	Start Time	End Time
Batch Add Projected Enrollment	Completed	10/11/2022 4:23:24 PM	10/11/2022 4:23:24 PM

[Hide Results](#)
 Batch Add Projected Enrollment
 Student 25 of 25 (100%)

8. A failure message will result when:
 - Trying to add a projected enrollment to a student that already has one.
 - Trying to add a projected enrollment to a student that is missing a DOB.
 - Trying to add a projected enrollment to a student that is missing a Primary Language.
- To remove (delete) a batch of projected enrollments, Select ➤ the Remove Projected Enrollment option.

Remove Projected Enrollment

1. Navigate to **Census > Batch Enrollment** and select Remove Projected Enrollment.



2. The Remove Projected Enrollment screen will refresh with the Projected Enrollment Screen.

A screenshot of the 'Batch Remove Projected Enrollments' screen. The screen has a title bar with 'Cancel' and 'Help' icons. It contains several form fields and checkboxes. At the top, there is a 'Projected Enrollment' dropdown set to '2011-Regular School Year Enrollment' and a 'School Year' dropdown set to '2021-2022'. Below these is a 'Start' date field set to '10/12/2022' with an 'Auto Start' checkbox. A 'Provider' dropdown is set to '1 SCHOOL (280215030001)'. There are checkboxes for 'Is Placed' and 'Include in Rank'. Below these are 'Grade' (set to 'P1') and 'Alternate Reported Grade' (set to 'N/A') dropdowns. A 'Class' dropdown is set to '2022-2023'. A 'Diploma' dropdown is set to 'Regents'. There is a text field for 'Exit reason for current enrollment' with a dropdown arrow. At the bottom, there are 'Saved Searches' and 'Add Search Criteria' dropdowns, both set to 'NEW SEARCH' and 'SELECT CRITERIA' respectively. There are also checkboxes for 'Random' and 'Use AND for the terms'. A 'SEARCH' button is at the bottom right.

3. Select the following information: Enrollment, School Year, Start Date, Date Registered, Provider, Grade, Alternate Reported Grade, Class, Homeroom, Counselor, and Diploma. You can check the Is Placed and Include in Rank checkboxes if applicable.
4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to remove the projected enrollment for by deselecting all students in the search results and click on just those students to project.
6. Click the red Delete button at the top of the screen. It will ask you "Are you sure?" Click OK to proceed.
7. The screen will refresh indicating the results.

Description	Status	Start Time	End Time
Batch Remove Projected Enrollment	Completed	10/11/2022 4:32:26 PM	10/11/2022 4:32:27 PM

[Hide Results](#)
[Batch Remove Projected Enrollment](#)
 Student 17 of 17 (100%)

8. You will receive a failure message if you are trying to remove a projected enrollment for a student that doesn't currently have a projected enrollment with the exact same criteria.

- To add a batch of alternate enrollments, Select ➤ the Add Alternate Enrollment option.

Add Alternate Enrollment

1. Navigate to **Census > Batch Enrollment** and select Add Alternate Enrollment.

Batch Enrollment
Help

➤ Enrollment Start

➤ Add Projected Enrollment

➤ Remove Projected Enrollment

➤ Add Alternate Enrollment

➤ Remove Alternate Enrollment

2. The screen will refresh to show the alternate enrollment fields.

Batch Add Alternate Enrollments
Cancel Help

Enrollment Type: NONE

Start: 10/29/2024
End: Current

Provider: Mindex ES1
Elementary

☐ Is Placed
☐ Include in Rank

Grade: NONE
Alternate NYS Reported Grade: N/A

Class of: NONE
None
Homeroom: NONE

Counselor: NONE
Diploma: NONE

Exit Reason: --Select One--

Entry Note:

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

☐ Random
☐ Use "AND" for like terms

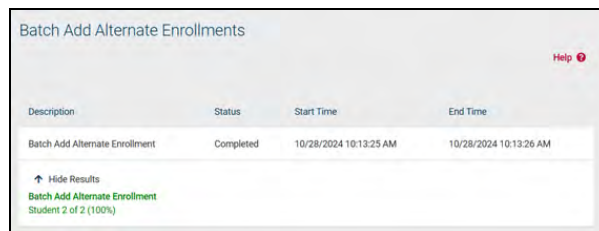
SEARCH

3. Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, Diploma, and Entry Note. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments can only be created for in-district providers. The Include in Rank checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available.

4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to add the alternate enrollment to using the checkboxes to the left. If needed, uncheck the Select All checkbox and check only the students who should have an alternate enrollment added.
6. Click the green Add button at the top of the screen.
7. The screen will refresh indicating the results.



The screenshot shows a web interface titled "Batch Add Alternate Enrollments" with a "Help" icon in the top right. Below the title is a table with four columns: "Description", "Status", "Start Time", and "End Time". The table contains one row: "Batch Add Alternate Enrollment", "Completed", "10/28/2024 10:13:25 AM", and "10/28/2024 10:13:26 AM". Below the table is a "Hide Results" link with an upward arrow. Underneath that, the text "Batch Add Alternate Enrollment" and "Student 2 of 2 (100%)" is displayed in green.

Description	Status	Start Time	End Time
Batch Add Alternate Enrollment	Completed	10/28/2024 10:13:25 AM	10/28/2024 10:13:26 AM

[↑ Hide Results](#)
Batch Add Alternate Enrollment
Student 2 of 2 (100%)

8. A failure message will result when:
 - Adding an alternate enrollment to a student that already has one in the selected location/date range.
 - Adding an alternate enrollment to a student that already has an official enrollment in the selected location/date range.
 - Adding an alternate enrollment to a student that already has a projected enrollment in the selected location/date range.

- To remove (delete) a batch of alternate enrollments, Select ➤ the Remove Alternate Enrollment option.

Remove Alternate Enrollment

1. Navigate to **Census > Batch Enrollment** and select Remove Alternate Enrollment.



2. The screen will refresh with the alternate enrollment fields.

 A screenshot of the 'Batch Remove Alternate Enrollments' form. The form has a title bar 'Batch Remove Alternate Enrollments' and 'Cancel' and 'Help' icons in the top right. The form contains several fields: 'Enrollment Type' (dropdown menu, currently 'NONE'), 'Start' (date field, currently '10/28/2024'), 'End' (radio button for 'Current'), 'Provider' (dropdown menu, currently 'Mindara ES1'), 'Elementary' (dropdown menu), 'Is Placed' (checkbox), 'Include in Rank' (checkbox), 'Grade' (dropdown menu, currently 'NONE'), 'Alternate NYS Reported Grade' (dropdown menu, currently 'N/A'), 'Class of' (dropdown menu, currently 'NONE'), 'Homeroom' (dropdown menu, currently 'NONE'), 'Counselor' (dropdown menu, currently 'NONE'), 'Diploma' (dropdown menu, currently 'NONE'), 'Exit Reason' (text field), 'Saved Searches' (dropdown menu, currently 'NEW SEARCH'), 'Add Search Criteria' (dropdown menu, currently 'SELECT CRITERIA'), 'Random' (checkbox), and 'Use AND for like terms' (checkbox). A 'SEARCH' button is at the bottom center.

3. Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, and Diploma. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments are only associated with in-district providers. The "Include in Rank" checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available.

- Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
- Select the students you want to remove the alternate enrollment from using the checkboxes to the left. If needed, uncheck the Select All checkbox and check only the students who should have an alternate enrollment removed.
- Click the red Delete button at the top of the screen. It will ask you "Are you sure?" Click OK to proceed.
- The screen will refresh indicating the results.

Batch Remove Alternate Enrollments			
			Help ?
Description	Status	Start Time	End Time
Batch Remove Alternate Enrollment	Completed	10/28/2024 9:58:25 AM	10/28/2024 9:58:27 AM
↑ Hide Results Batch Remove Alternate Enrollment Student 2 of 2 (100%)			
Student Name	Student ID	Error Message	
Adams, Richard	27069	A matching Alternate Enrollment record could not be found	
Allen, Lisa	35731	A matching Alternate Enrollment record could not be found	

- You will receive a failure message if you are trying to remove an alternate enrollment for a student that doesn't currently have an alternate enrollment with the exact same criteria.

Batch Enrollment Start

The Enrollment Start option allows users to modify a batch of enrollment start dates and transfer projected enrollments to official enrollments

- Navigate to **Census > Batch Enrollment** and select Enrollment Start.

Batch Enrollment	
	Help ?
Enrollment Start Add Projected Enrollment Remove Projected Enrollment Add Alternate Enrollment Remove Alternate Enrollment	

- The Enrollment Start screen will appear with a list of students who have projected start dates for the selected School Year.

Enrollment Batch Start

☒ In District
 ☐ Out of District
 ☐ Select Students

School Year: 2021-2022
 Building: Mindex HS
 School Level: High School
 Save Help

Exit Reason for Currently Enrolled Students: Completed grade
 ☐ Use Projected Enrollment Exit Reason

Enrollment Start Date: 10/11/2022

☒	Student ID	Last Name	First Name	From Provider	From Grade	To Provider	To Grade	Start Date	HR	Counselor
☒	41160	Carter	Jack	Mindex ES1/Elementary	3	Mindex HS/High School	9	10/12/2022	173	Jones, Amanda
☒	43527	Davis	Helen	Mindex ES1/Elementary	2	Mindex HS/High School	9	10/12/2022	181	Martinez, Patricia
☒	47249	Dixon	Linda	Mindex ES1/Elementary	5	Mindex HS/High School	9	10/12/2022	152	Jones, Amanda
☒	43562	Edwards	James	Mindex ES1/Elementary	1	Mindex HS/High School	9	10/12/2022	181	Martinez, Patricia
☒	39168	Hernandez	Mary	Mindex ES1/Elementary	4	Mindex HS/High School	9	10/12/2022	173	Martinez, Patricia

3. Select the radio button for In District, Out of District, or Select Students as appropriate.
 - A. When the In District option is selected, users may select a specific Building and School Level, or may choose "All" to include all possible Buildings and/or School Levels.
 - B. When the Out of District option is selected, users may select the appropriate school year, exit reason, and enrollment start date. Only students with Out of District projected enrollments will be displayed.
 - C. When the Select Students option is selected, users may use the batch selector to locate a group of students for whom they wish to activate projected enrollments.
 4. Choose a school year from the drop-down to locate students with projected enrollments for that year.
- Note:** Notice that the table lists each student's current provider and grade, as well as their destination provider and grade based on existing official enrollments and projected enrollments.
5. Select the Building, and School Level where the selected student(s) will be enrolled (in district enrollments only).
 6. Select an exit reason to be applied to any students with current official enrollments.
 - A. If the "Use Projected Enrollment Exit Reason" option is checked, projected enrollments will be ended with the exit reason specified in the projected enrollment, rather than the exit reason selected on the Enrollment Batch Start screen. Projected enrollments that do not have an exit reason will be ended with the exit reason selected on this screen.
 7. Select the appropriate student(s) whose enrollment(s) will begin on the specified date by checking the boxes to the left of each name.
 8. Verify the Enrollment Start Date is today or a date in the past. You cannot rollover a projected enrollment to a date in the future.

9. After clicking the Save  button, the job will run immediately. Users will see the status of the job as it runs and any errors that may have been returned.



Description	Status	Start Time	End Time
Batch Enrollment Start	Completed	10/11/2022 4:28:57 PM	10/11/2022 4:28:58 PM

Hide Results

Batch Enrollment Start
Student 8 of 8 (100%)

Student Name Student ID/Email Message

Carter, Jack 41160

Davis, Helen 43527

Dixon, Linda 47249

Kennedy, Daniel 41217

Martinez, Patrick 44569

Moore, Joseph 38831

Moore, Shiley 41175

Robinson, Donald 43345

10. Users may review the history of these jobs from the Job Object History area on the **Census > Batch Enrollments** screen.

Note: You may edit this enrollment as needed. For more information, refer to the Editing an Official Enrollment section.

Batch Add Projected Enrollments

The Add Projected Enrollment option allows you to add projected enrollments for multiple students using the batch selector.

1. Navigate to **Census > Batch Enrollment** and select Add Projected Enrollment.



Batch Enrollment

Help

- > Enrollment Start
- > Add Projected Enrollment
- > Remove Projected Enrollment
- > Add Alternate Enrollment
- > Remove Alternate Enrollment

2. The Add Projected Enrollment screen will refresh with the Projected Enrollment Screen.

3. Select the following information: Enrollment, School Year, Start Date, Date Registered, Provider, Grade, Alternate Reported Grade, Class, Homeroom, Counselor, and Diploma. You can check the "Is Placed" and "Include in Rank" checkboxes if applicable.
4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to add the projected enrollment to and deselect any you do not want included.
6. Click the green Add button at the top of the screen.
7. The screen will refresh indicating the results.

Description	Status	Start Time	End Time
Batch Add Projected Enrollment	Completed	10/11/2022 4:23:24 PM	10/11/2022 4:23:26 PM

[Hide Results](#)
 Batch Add Projected Enrollment.
 Student 25 of 25 (100%)

8. A failure message will result when:
 - Trying to add a projected enrollment to a student that already has one.
 - Trying to add a projected enrollment to a student that is missing a DOB.
 - Trying to add a projected enrollment to a student that is missing a Primary Language.

Batch Remove Projected Enrollment

Sometimes students who were given projected enrollments to start in the district decide not to attend making it necessary to remove their projected enrollments.

1. Navigate to **Census > Batch Enrollment** and select Remove Projected Enrollment.



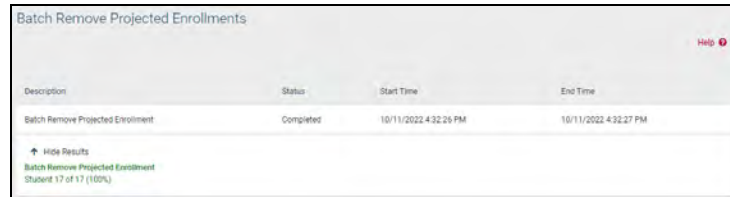
2. The Remove Projected Enrollment screen will refresh with the Projected Enrollment Screen.

A screenshot of the 'Batch Remove Projected Enrollments' form. The form contains several fields: 'Projected Enrollment' (dropdown), 'Enrollment' (dropdown), 'School Year' (dropdown), 'Start' (date field), 'Auto Start' (checkbox), 'Provider' (dropdown), 'Is Placed' (checkbox), 'Include in Rank' (checkbox), 'Grade' (dropdown), 'Alternate Reported Grade' (dropdown), 'Class' (dropdown), 'Diploma' (dropdown), 'Exit reason for current enrollment' (dropdown), 'Saved Searches' (dropdown), 'Add Search Criteria' (dropdown), 'Random' (checkbox), 'Use AND for like terms' (checkbox), and a 'SEARCH' button.

3. Select the following information: Enrollment, School Year, Start Date, Date Registered, Provider, Grade, Alternate Reported Grade, Class, Homeroom, Counselor, and Diploma. You can check the Is Placed and Include in Rank checkboxes if applicable.
4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to remove the projected enrollment for by deselecting all students in the search results and click on just those students

to project.

6. Click the red Delete button at the top of the screen. It will ask you “Are you sure?” Click OK to proceed.
7. The screen will refresh indicating the results.



The screenshot shows a web interface titled "Batch Remove Projected Enrollments". It features a table with the following data:

Description	Status	Start Time	End Time
Batch Remove Projected Enrollment	Completed	10/11/2022 4:32:26 PM	10/11/2022 4:32:27 PM

Below the table, there is a link "Hide Results" and a green message: "Batch Remove Projected Enrollment Student 17 of 17 (100%)". A red "Help" button is visible in the top right corner.

8. You will receive a failure message if you are trying to remove a projected enrollment for a student that doesn't currently have a projected enrollment with the exact same criteria.

Batch Add Alternate Enrollment

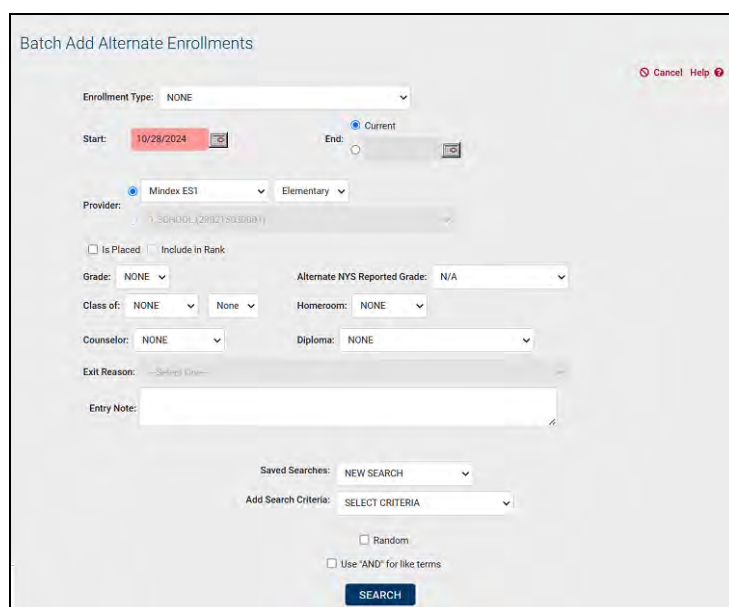
The Add Alternate Enrollment option allows you to add alternate enrollments for multiple students using the batch selector.

1. Navigate to **Census > Batch Enrollment** and select Add Alternate Enrollment.



The screenshot shows the 'Batch Enrollment' interface. It features a list of options: 'Enrollment Start', 'Add Projected Enrollment', 'Remove Projected Enrollment', 'Add Alternate Enrollment' (which is highlighted with a blue box), and 'Remove Alternate Enrollment'. A 'Help' icon is visible in the top right corner.

2. The screen will refresh to show the alternate enrollment fields.



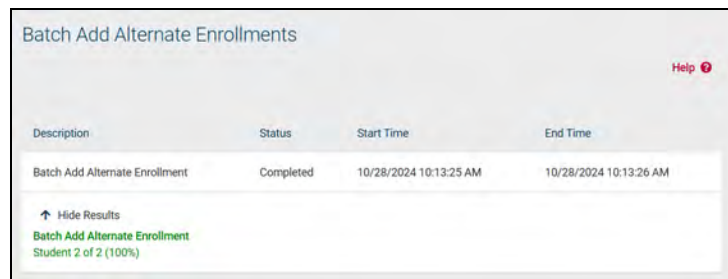
The screenshot displays the 'Batch Add Alternate Enrollments' form. It includes various fields for enrollment details: 'Enrollment Type' (set to NONE), 'Start' date (10/28/2024), 'End' date (Current), 'Provider' (Mindex ESI), 'Grade' (NONE), 'Alternate NYS Reported Grade' (N/A), 'Class of' (NONE), 'Homeroom' (NONE), 'Counselor' (NONE), 'Diploma' (NONE), 'Exit Reason' (Selected One), and 'Entry Note'. There are also checkboxes for 'Is Placed' and 'Include in Rank'. At the bottom, there are search options: 'Saved Searches' (NEW SEARCH), 'Add Search Criteria' (SELECT CRITERIA), and a 'SEARCH' button.

3. Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, Diploma, and Entry Note. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments can only be created for in-district providers. The Include in Rank checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available.

4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to add the alternate enrollment to using the checkboxes to the left. If needed, uncheck the Select All checkbox and check only the students who should have an alternate enrollment added.
6. Click the green Add button at the top of the screen.
7. The screen will refresh indicating the results.



The screenshot shows a web interface titled "Batch Add Alternate Enrollments". In the top right corner, there is a "Help" link with a red question mark icon. Below the title, there is a table with four columns: "Description", "Status", "Start Time", and "End Time". The table contains one row with the following data: "Batch Add Alternate Enrollment", "Completed", "10/28/2024 10:13:25 AM", and "10/28/2024 10:13:26 AM". Below the table, there is a link "Hide Results" with an upward arrow icon. At the bottom, there is a green message that says "Batch Add Alternate Enrollment" and "Student 2 of 2 (100%)".

Description	Status	Start Time	End Time
Batch Add Alternate Enrollment	Completed	10/28/2024 10:13:25 AM	10/28/2024 10:13:26 AM

↑ Hide Results

Batch Add Alternate Enrollment
Student 2 of 2 (100%)

8. A failure message will result when:
 - Adding an alternate enrollment to a student that already has one in the selected location/date range.
 - Adding an alternate enrollment to a student that already has an official enrollment in the selected location/date range.
 - Adding an alternate enrollment to a student that already has a projected enrollment in the selected location/date range.

Batch Remove Alternate Enrollment

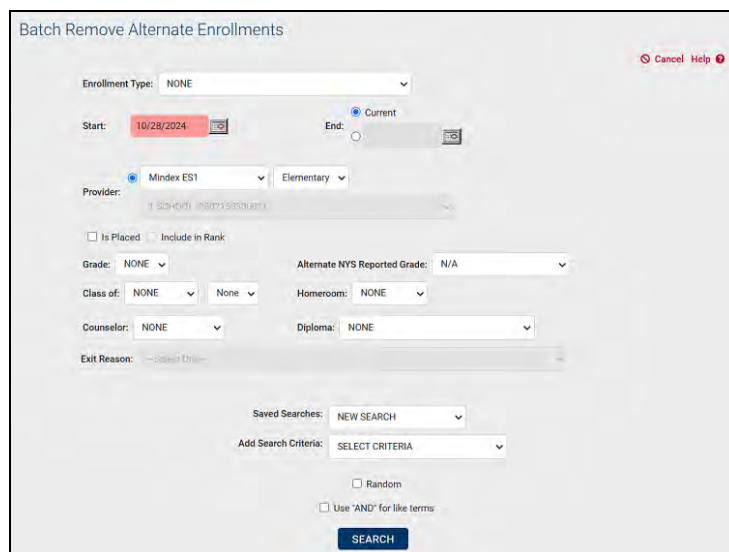
The Remove Alternate Enrollment option allows you to remove alternate enrollments for multiple students using the batch selector.

1. Navigate to **Census > Batch Enrollment** and select Remove Alternate Enrollment.



The screenshot shows the 'Batch Enrollment' page. It has a title bar with 'Batch Enrollment' and a 'Help' icon. Below the title bar is a list of options: 'Enrollment Start', 'Add Projected Enrollment', 'Remove Projected Enrollment', 'Add Alternate Enrollment', and 'Remove Alternate Enrollment'. The 'Remove Alternate Enrollment' option is highlighted with a blue rectangular box.

2. The screen will refresh with the alternate enrollment fields.



The screenshot shows the 'Batch Remove Alternate Enrollments' form. It has a title bar with 'Batch Remove Alternate Enrollments' and 'Cancel' and 'Help' icons. The form contains several fields: 'Enrollment Type' (dropdown menu), 'Start' (date field with a calendar icon), 'End' (dropdown menu with 'Current' selected), 'Provider' (dropdown menu with 'Mindex ESI' and 'Elementary' options), 'Is Placed' (checkbox), 'Include in Rank' (checkbox), 'Grade' (dropdown menu), 'Alternate NYS Reported Grade' (dropdown menu), 'Class of' (dropdown menu), 'Homeroom' (dropdown menu), 'Counselor' (dropdown menu), 'Diploma' (dropdown menu), 'Exit Reason' (dropdown menu), 'Saved Searches' (dropdown menu), 'Add Search Criteria' (dropdown menu), 'Random' (checkbox), 'Use AND for like terms' (checkbox), and a 'SEARCH' button.

3. Select any of the following fields: Enrollment Type, Start Date, Provider, Grade, Alternate NYS Reported Grade, Class of, Homeroom, Counselor, and Diploma. You can check the "Is Placed" checkbox if applicable.

Note: The out-of-district provider radio button is disabled as alternate enrollments are only associated with in-district providers. The "Include in Rank" checkbox is disabled as it is specifically tied to Rank/GPA calculations.

Note: If an End Date is chosen, the Exit Reason field will become available.

4. Using the Batch Selector, select the appropriate criteria to locate your group of students and click Search.
5. Select the students you want to remove the alternate enrollment from using the checkboxes to the left. If needed, uncheck the Select All checkbox and check only the students who should have an alternate enrollment removed.
6. Click the red Delete button at the top of the screen. It will ask you “Are you sure?” Click OK to proceed.
7. The screen will refresh indicating the results.

Batch Remove Alternate Enrollments			
Help ?			
Description	Status	Start Time	End Time
Batch Remove Alternate Enrollment	Completed	10/28/2024 9:58:25 AM	10/28/2024 9:58:27 AM
↑ Hide Results Batch Remove Alternate Enrollment Student 2 of 2 (100%)			
Student Name	Student ID	Error Message	
Adams, Richard	27069	A matching Alternate Enrollment record could not be found	
Allen, Lisa	35731	A matching Alternate Enrollment record could not be found	

8. You will receive a failure message if you are trying to remove an alternate enrollment for a student that doesn't currently have an alternate enrollment with the exact same criteria.

Reviewing the Job Object History

On the main Batch Enrollment sub-module screen, users can view job history for batch actions performed from within this sub-module. The list of job objects is displayed at the bottom of the Batch Enrollment screen and contains information about all jobs performed from within the Batch Enrollment sub-module. The list shows the job Description, Status, Start Time and Finish Times for each job.

Batch Enrollment
Help

- Enrollment Start
- Add Projected Enrollment
- Remove Projected Enrollment
- Add Alternate Enrollment
- Remove Alternate Enrollment

Show jobs from previous: 1 Month

Description	Status	Start Time	End Time
Batch Remove Alternate Enrollment	Completed	10/28/2024 9:58:25 AM	10/28/2024 9:58:27 AM
Show Results			
Batch Remove Alternate Enrollment	Completed	10/28/2024 10:01:53 AM	10/28/2024 10:01:53 AM
Show Results			
Batch Add Alternate Enrollment	Completed	10/28/2024 10:13:25 AM	10/28/2024 10:13:26 AM
Show Results			

By default, the list shows all jobs from the past month, but it may be filtered to show jobs from a longer or shorter date range. Users may select their desired timeframe from the drop-down menu at the top of the Job Object History list:

Show jobs from previous:

1 Month

1 Week
1 Month
3 Months
6 Months
12 Months
Current School Year

Users may choose to view additional details about each job by clicking on the Show Results  button below each job description.

The details are specific to each particular job, and will show you how many students were included in that job and of those, how many were processed. This does *not* mean that information was changed in each of those records; rather, it is an indicator of how many individual records were processed during that job.

The details will also display any error messages that were created during that process.

Census > Batch Program Services

The **Batch Program Services** sub-module is where you are able to add or remove most program services to or from a group of students as determined by using an advanced search (Batch Selector). The **Batch Program Services** sub-module is permission based. If you do not have permission, please contact your SchoolTool liaison. Users can also view job history for batch actions performed from within this sub-module.

Users can batch add, end, or remove the following program services:

- AIS
- Alternate Assessment Program
- CIP
- Disability
- Exempt LEP/ELL
- Funding
- IEP
- Level of Integration
- LEP/ELL
- Other
- Section 504
- Section 504 Safety Net
- Special Programs
- Test Modification

Note: While the basic procedure for batch adding, ending, or removing program service records is the same for all program services, each program service has its own set of fields. Some program services are dependent on others; therefore, some records cannot be added until a corresponding record has been created for another program service. The specific dependencies, along with screen shots and descriptions of the fields available when working with each program service, are detailed in Census Appendix 1: Program Services.

Batch Add Program Services

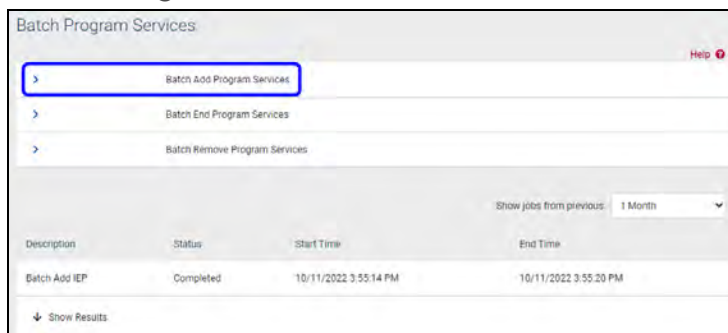
This area allows you to add identical program service records to a group of students.

Examples:

- A user might want to add a "Gifted" program service to all students that are found in a Batch Selector Grade Search (English > 90, Math > 90, ...)
- A user might need to add ESL to all students whose primary language is Spanish.

When batch adding program services, all current rules apply in terms of dependencies and overlapping. See the Census Appendix 1 for specifics on each program service.

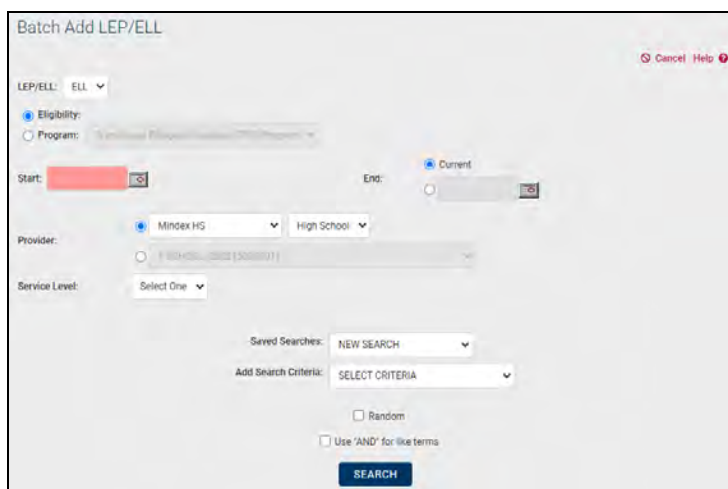
1. Navigate to **Census > Batch Program Services** and select Batch Add Program Services.
2. Select the **Batch Program Services** sub-module from the menu on the left.



The screenshot shows the 'Batch Program Services' interface. On the left, there is a menu with three options: 'Batch Add Program Services' (highlighted with a blue box), 'Batch End Program Services', and 'Batch Remove Program Services'. To the right of the menu, there is a table with columns: 'Description', 'Status', 'Start Time', and 'End Time'. The table contains one row: 'Batch Add IEP' with status 'Completed', start time '10/11/2022 3:55:14 PM', and end time '10/11/2022 3:55:20 PM'. Above the table, there is a dropdown for 'Show jobs from previous' set to '1 Month'. Below the table is a 'Show Results' button.

3. A list of available Program Services will appear. Select the one you wish to add to a group of students.

In this example, we will use the LEP/ELL program service.

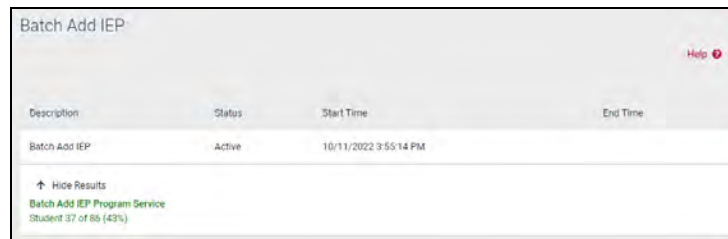


The screenshot shows the 'Batch Add LEP/ELL' form. It includes several fields: 'LEP/ELL' dropdown set to 'ELL', 'Eligibility' radio button selected, 'Program' dropdown, 'Start' date field, 'End' date field with 'Current' selected, 'Provider' dropdown set to 'Mindex HG', 'High School' dropdown, 'Service Level' dropdown set to 'Select One', 'Served Searches' dropdown set to 'NEW SEARCH', 'Add Search Criteria' dropdown set to 'SELECT CRITERIA', 'Random' checkbox, and 'Use AND for like terms' checkbox. A 'SEARCH' button is at the bottom.

4. The screen will refresh and display a Batch Add window. Complete the necessary fields. In this example, the following fields are available:
 - Eligibility or Program (if Program is selected, you'll need to select a specific program)
 - Start date (required)
 - End date (choose Current or specify an end date)
 - Provider
 - Service Level
 - **Note:** The fields necessary to fill out will vary based on the Program Service selected.
5. After completing the Batch Add fields, use the Batch Selector to select your group of students by selecting the criteria they have in common, using a saved

search, or using a saved result. See the Batch Selector User Guide for more information.

6. Click the Search button and review the results list. Select the students by deselecting all students and then clicking the check box to the left of the student's name.
7. Once the students have been selected, click on the Add + button at the top of screen.
8. You will receive a confirmation message indicating the number of students who had the program service added to their records. You can also use the Show/Hide Results ↓↑ buttons to see a list of the students.

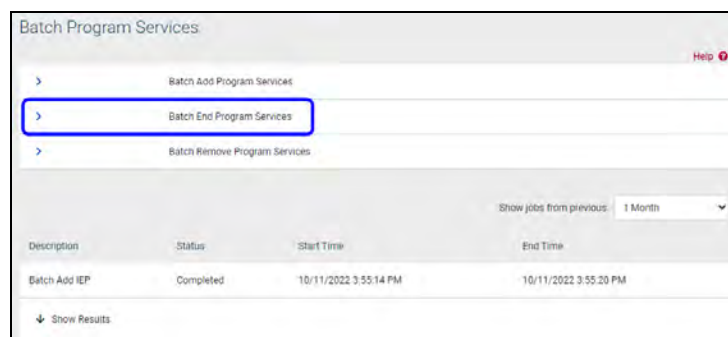


9. A failure message will result for any of the following situations:
 - Adding a program service to a student that already has that program service.
 - Adding a program service to a student that is missing a DOB.
 - Adding a program service to a student that is missing a Primary Language.

Batch End Program Services

When batch removing program services, Program services will be removed from all selected students **only if they have the program service that exactly matches the one entered.**

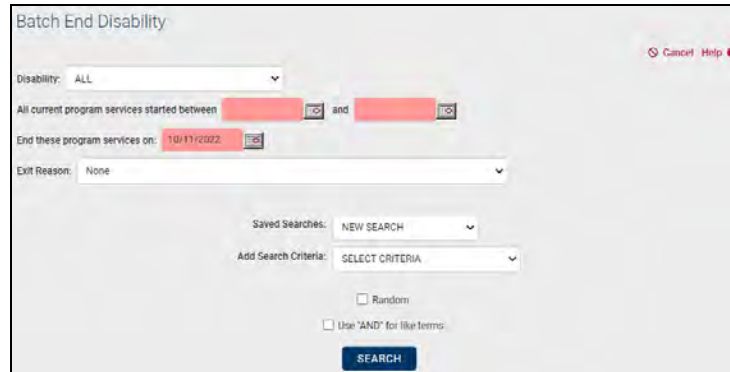
1. Navigate to **Census > Batch Program Services** and select Batch End Program Services.



2. Select the Program Service to be ended using the appropriate Select > icon. All of the listed program services will be available on this screen.

Note: This list is identical to the Batch Add Program Service option in that Enrollments and Referrals are not included.

3. Fill in all options (there may be several options that are required to appropriately locate and end matching records):



Sample Batch Remove Program Services screen with Disability service selected

- A. Program Services Sub-Type (labeled "Disability" in this snapshot)
 - i. Most program services have a program service (such as Disability) and a program service type (such as Autism).
 - ii. "ALL" will be the first, and default option in this dropdown when it is displayed. Selecting this option will end all program services of the selected type.
 - iii. The following program services have no sub-types, so this option will not be displayed:
 - a. AIS
 - b. Exempt LEP/ELL
 - c. IEP
 - d. Section 504
 - e. Test Modification
- B. All current program services started between...

These dates are required. The only Program Services that are eligible to be ended are ones that are current with a start date within this date range, inclusive.

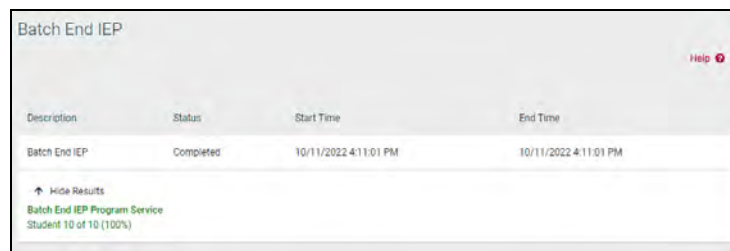
- C. End these program services on...

This field will contain the date that will be contained in the program service "End Date" field. This is a required field that will default to the current date.

D. Exit Reason

An Exit Reason field will display for the following program services, defaulting to the first item in the drop-down list.

- For AIS, the Exit Reason is optional
 - For CIP, the Exit Reason is required
4. Use Batch Selector to locate students. The Batch Selector is displayed at the bottom of the Batch End program Services Screen. It is needed to specify the group of students that needs to have the specified program services ended.
 5. Click the Save  button at the top of the screen to perform the Batch End operation
 6. Examine the results.



Description	Status	Start Time	End Time
Batch End IEP	Completed	10/11/2022 4:11:01 PM	10/11/2022 4:11:01 PM

[Hide Results](#)
Batch End IEP Program Service
Student 10 of 10 (100%)

7. Each one of the students found with the Batch Selector will be processed. The progress of the operation will be tracked on screen, and all failures will be reported.
8. The following conditions are responsible for failures; the program service for these students will not be modified.
 - A program service start date that is after the specified end date
 - The program service does not exist for a student
 - The program service start date is not within the specified range
 - The program service has already been ended

Batch Remove Program Services

These screens require specific data so you can be more specific when searching for the records to remove. This area was designed to allow users to remove records that were batch added by mistake.

1. Navigate to **Census > Batch Program Services** and select Batch Remove Program Services.

Batch Program Services

Help

Batch Add Program Services

Batch End Program Services

Batch Remove Program Services

Show jobs from previous: 1 Month

Description	Status	Start Time	End Time
Batch Add IEP	Completed	10/11/2022 3:55:14 PM	10/11/2022 3:55:20 PM

Show Results

2. Select the Program Service to be removed using the appropriate Select > icon. In this example, we will use the IEP program service.
3. The screen will refresh and display a Batch Remove screen. Complete the necessary fields to end records that match this criteria.

Batch Remove IEP

IEP: IEP

Start: 10/11/2022

End: Current

Provider: Minde x HS High School

Save Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

Random

Use "AND" for like terms

SEARCH

4. After completing the Batch Remove fields, use the Batch Selector to select your group of students by selecting the criteria they have in common, using a saved search, or using a saved result. See the **Batch Selector Guide** for more information.
5. Click the Search button and review the results list. Select the students by deselecting all students and then clicking the check box to the left of the student's name.
6. Once the students have been selected, click on the Remove button at the top of screen. You will be asked to confirm the deletion
7. You will receive a confirmation message indicating the number of students who had the program service removed from their record. You can also use the Show/Hide Results buttons to see a list of the students.

Batch Remove IEP

Help

Description	Status	Start Time	End Time
Batch Remove IEP	Completed	10/11/2022 4:16:38 PM	10/11/2022 4:16:40 PM

Hide Results

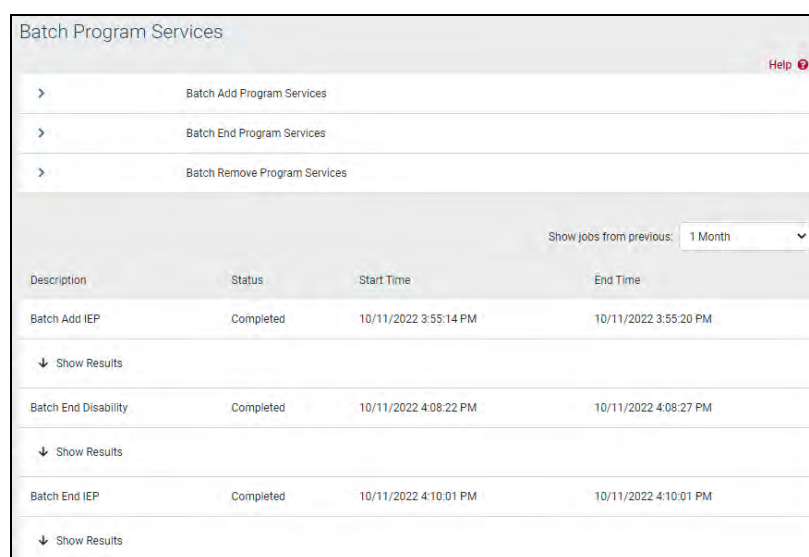
Batch Remove IEP Program Service

Student 26 of 26 (100%)

8. A failure message will result if you are trying to remove a program service for any student that doesn't already have one that matches the specified criteria.

Reviewing the Job Object History

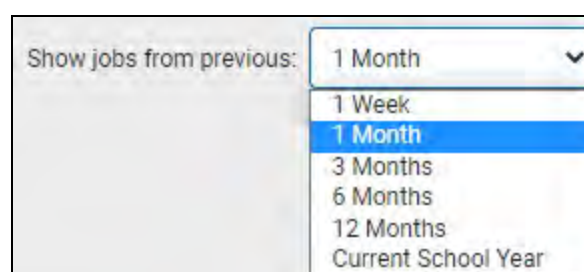
On the main Batch Program Services sub-module screen, users can view job history for batch actions performed from within this sub-module. The list of job objects is displayed at the bottom of the Batch Program Services screen and contains information about all jobs performed from within the Batch Enrollment sub-module. The list shows the job Description, Status, Start Time and Finish Times for each job.



The screenshot shows the 'Batch Program Services' interface. At the top, there are three expandable sections: 'Batch Add Program Services', 'Batch End Program Services', and 'Batch Remove Program Services'. Below these is a filter dropdown labeled 'Show jobs from previous:' with '1 Month' selected. The main table displays job history with columns: Description, Status, Start Time, and End Time. Three jobs are listed, each with a 'Show Results' button below its description.

Description	Status	Start Time	End Time
Batch Add IEP	Completed	10/11/2022 3:55:14 PM	10/11/2022 3:55:20 PM
↓ Show Results			
Batch End Disability	Completed	10/11/2022 4:08:22 PM	10/11/2022 4:08:27 PM
↓ Show Results			
Batch End IEP	Completed	10/11/2022 4:10:01 PM	10/11/2022 4:10:01 PM
↓ Show Results			

By default, the list shows all jobs from the past month, but it may be filtered to show jobs from a longer or shorter date range. Users may select their desired timeframe from the drop-down menu at the top of the Job Object History list:



Users may choose to view additional details about each job by clicking on the Show Results ↓ button below each job description.

Description	Status	Start Time	End Time
Batch Add IEP	Completed	10/11/2022 3:55:14 PM	10/11/2022 3:55:20 PM
↓ Show Results			
Batch End Disability	Completed	10/11/2022 4:08:22 PM	10/11/2022 4:08:27 PM
↓ Show Results			
Batch End IEP	Completed	10/11/2022 4:10:01 PM	10/11/2022 4:10:01 PM
↑ Hide Results			
Batch End IEP Program Service Student: 10 of 10 (100%)			
Student Name	Student ID	Error Message	
Brooks, William	35790	Student does not have a matching IEP record.	
Cooper, Alan	33003	Student does not have a matching IEP record.	
Feeor, Maria	30833	Student does not have a matching IEP record.	
Hernandez, Karen	39347	Student does not have a matching IEP record.	
Hicks, Linda	27756	Student does not have a matching IEP record.	
Spacely, Diana	49864	Student does not have a matching IEP record.	
Woolton, Christopher	36550	Student does not have a matching IEP record.	
Woolton, Mildred	37375	Student does not have a matching IEP record.	
Wright, James	37520	Student does not have a matching IEP record.	

The details are specific to each particular job, and will show you how many students were included in that job and of those, how many were processed. This does *not* mean that information was changed in each of those records; rather, it is an indicator of how many individual records were processed during that job.

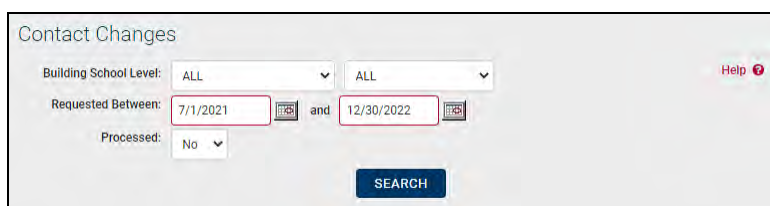
The details will also display any error messages that were created during that process.

To hide these details, click the Hide Results  button.

Note: Job Object History is managed through the Maintenance module. Items may appear to be removed from this list as they are archived from within Maintenance.

Contact Changes

This submodule allows users to approve or deny contact information change requests from parents.

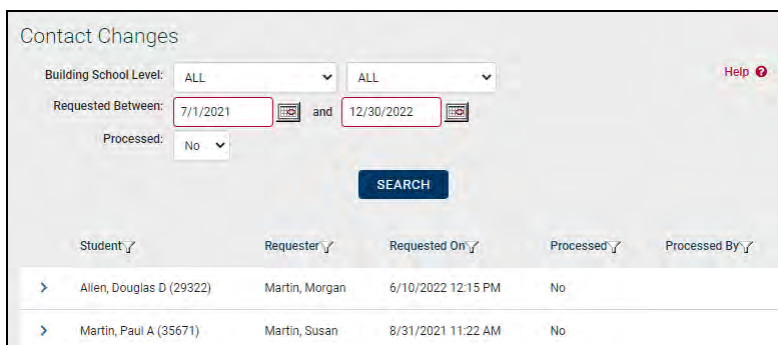


The screenshot shows the 'Contact Changes' search interface. It includes two dropdown menus for 'Building School Level' (both set to 'ALL'), a date range selector for 'Requested Between' (from 7/1/2021 to 12/30/2022), and a 'Processed' dropdown (set to 'No'). A blue 'SEARCH' button is at the bottom. A red 'Help' icon is in the top right corner.

To search for submitted requests, enter the following information:

- Building School Level
- Requested Between: View requests that were submitted in the given timeframe.
- Processed (No/Yes): Choose Yes to view requests that have already been reviewed and approved or denied or choose No to view requests that are still waiting to be reviewed.

Once this information has been entered, click Search. Applicable results will appear.



The screenshot shows the search results for contact changes. The search criteria are the same as in the previous image. Below the search criteria is a table with two rows of results. Each row has a blue arrow icon to its left. The table columns are Student, Requester, Requested On, Processed, and Processed By.

Student	Requester	Requested On	Processed	Processed By
Allen, Douglas D (29322)	Martin, Morgan	6/10/2022 12:15 PM	No	
Martin, Paul A (35671)	Martin, Susan	8/31/2021 11:22 AM	No	

Click on the arrow next to the record to process. The next screen will show what changes have been requested.

Approve Change Requests

Changes for Chris Carter (32961)
Requested by Morgan Martin on 7/14/2022 at 11:08 AM

Help

Student: Carter, Chris (32961)

CALL ORDER

From	→	To	Approve/Deny
Dawn Richardson, Mother, Cell : (555) 431-9963		Dawn Richardson, Mother, Cell : (555) 431-9963	
Matthew Carter, Father, Cell : (555) 431-9965		Matthew Carter, Father, Cell : (555) 431-9965	
Matthew Carter, Father, Work : (555) 431-5251 x1784		Matthew Carter, Father, Work : (555) 431-5251 x1784	
Andrew Moore, Emergency Contact, Cell : (555) 433-6335		Andrew Moore, Emergency Contact, Cell : (555) 433-6335	
		Dawn Richardson, Mother, Text : (555) 432-3479 x0012	
		Matthew Carter, Father, Text : (555) 432-6157 x4690	

Contact: Richardson, Dawn (Mother)

Contact: Carter, Matthew (Father)

Contact: Moore, Andrew (Emergency Contact)

COMMIT

CANCEL

Select Approve or Deny in the dropdown on the right, and click Commit to process the request. If the committal was successful, a message will appear on the next screen, and the parent who requested the changes will receive an email showing what changes were approved or denied.

Change request for Turner, Joe (19741) has been processed.

Census > Receive Student Data

The **Census > Receive Student Data** sub-module allows districts to receive student data from other SchoolTool districts, online pre-registration sessions, and external vendors. You can also monitor changes to student demographic data that occur after a student has been transferred from another SchoolTool district.

After reviewing the incoming data, users can create records and import data into SchoolTool. Four lists of students will be displayed: one for Transfer Students, one for Online Pre-Registration, one for External Registration, and one for Update Students (depending on your permissions, you may see only one or two sets of students to receive/manage).

To begin, use the filters at the top of the screen to narrow the list of sessions as desired. Searching for text will locate any sessions that contain that text in the session details (as shown on this screen), as well as any sessions that include children or adults in the session data whose names contain that text.

The screenshot displays the 'Receive Student Data' interface. At the top, there are filters for 'Receive Mode' (Individual, Batch), 'Contains Text' (a search bar), 'Created Between' (date range), and 'Committed' (a dropdown menu). A 'SEARCH' button is located below the filters. The interface is divided into three main sections, each with a plus icon to expand it:

- Transfer Students:** A table with columns: Original Student ID, Name, District, Date Received, Committed, Course Selections, and UDS Data. It shows two rows of data for students from MONROE CITY CSD.
- Online Pre-Registration:** A table with columns: Session, Student(s), Creator, Created On, Modified On, Committed, Course Selections, and UDS Data. It shows two rows of data for students from Rogers, Catherine and Henderson, Irene.
- External Registration:** A table with columns: Name, Date of Birth, Date Received, Committed Date, Committed By, and API Vendor. It shows five rows of data for students from Alexander, Jacob, Michaels, Helen, Nichols, Ryan, Tyler, Frank, and Jamison, Ralph.

At the bottom, there is an 'Update Students' section with a checkbox for 'Show previously rejected changes' and a table with columns: Student, Date Received, Received From, Field Name, Current Value, and Pending Value.

Districts using User Defined Screens and/or Course Selections will see that additional data in the grids. Users also have the ability to configure both the Transfer Students and Online Pre-Registration grids on this screen to specify additional columns to show UDS data from incoming sessions.

To change the columns displayed in one of the grids for Transfer Students or Online Pre-Registration, click the respective Configure Grid **⊕** button.

Transfer Students ⊕						
	Original Student ID	Name	District	Date Received	Committed	Course Selections
	82556	Briens, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM		NYS Digital Resources Family Questionnaire Senior Parking Privileges
	82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:08:49 PM		AVIATION II NYS Digital Resources Family Questionnaire

A pop-up will appear containing a list of all available fields from any User Defined Screens available to that grid. If multiple screens have the same field, that field will be shown only once in this list.

Select the columns you wish to display on the grid and click the **Update** button.

Configure Grid

Select Columns to Show:

- ☐ Parking Notes
- ☐ Permit Number
- ☐ Question 1
- ☐ Question 2
- ☐ Question 3
- ☐ Question 4
- ☐ Question 5
- ☐ Question 6

UPDATE

The selected columns will now be displayed.

Transfer Students ⊕						
	Original Student ID	Name	District	Date Received	Committed	Course Selections
	82556	Briens, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM		NYS Digital Resources Family Questionnaire Senior Parking Privileges
	82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:08:49 PM		AVIATION II NYS Digital Resources Family Questionnaire

The columns selected for each grid will be remembered the next time you access this screen. Click the Configure Grid **⊕** button to change the selected columns at any time.

Notes:

The Student(s) column in the Online Pre-Registration section will list the student name or names included in the session.

The Configure Grid **⊕** button will only appear if this district is using User Defined Screens for the Transfer Students or Online Pre-Registration features.

To filter a grid based on the values in one or more column, simply click on the Filter  icon for the desired column(s). Filters are specific to each grid (for example, filtering course selections on the Transfer Students grid will not filter the rows in the Online Pre-Registration grid). Filters will be remembered for each user and will be re-applied the next time you access this screen.

Original Student ID	Name	District	Date Received	Committed	Course Selections	UDS Data
82556	Brians, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM			NYS Digital Resources Family Questionnaire Senior Parking Privileges
82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:08:49 PM		AVIATION II	NYS Digital Resources Family Questionnaire

Enter the desired text in the field that appears (the rows will automatically filter as you type). Close the filter field by pressing Enter or by clicking outside the filter field.

Transfer Students

Original Student ID

Name

District

monroe

82556	Brians, Gary	MONROE CITY CSD
82555	Simpson, Martha	MONROE CITY CSD

The Filter button will change to the Active Filter  icon to indicate when a filter is active. To remove a filter, simply click on the Active Filter  icon and delete the text in that field. Press Enter or click outside the filter field to update the results.

Original Student ID	Name	District	Date Received	Committed	Course Selections	UDS Data
82556	Brians, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM			NYS Digital Resources Family Questionnaire Senior Parking Privileges
82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:08:49 PM		AVIATION II	NYS Digital Resources Family Questionnaire

Receiving Students in Batch Mode

Users with the appropriate permissions have the ability to select multiple students to receive in a single operation.

Receive Student Data

Receive Mode:

Individual

Batch

Contains Text:

Created Between: and

Committed: No

SEARCH

When the user selects Batch Mode, checkboxes will display in each list, allowing the user to select the students to be received.

Note: Transfer Students, Online Pre-Registration, and External Registration sessions can be received in batch mode, but not in the same operation.

Receive Student Data

Receive Mode: ☐ Individual ☒ Batch

Contains Text:

Created Between: and

Committed: No

SEARCH

2 Students (1 selected)

Transfer Students: **RECEIVE TRANSFER STUDENTS**

	Original Student ID	Name	District	Date Received	Committed	Course Selections	UGS Data
☒	82556	Brians, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM		NYS Digital Resources Family Questionnaire Senior Parking Privileges	
☒	82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:06:49 PM		AVIATION II NYS Digital Resources Family Questionnaire	

After selecting students, click the **Receive Transfer Students**, **Receive Online Pre-Registration Students**, or the **Receive External Registration Students** button as appropriate. The selected students will be processed and imported using the Batch Receive Rules defined in Maintenance.

You will be directed to a new screen, where a progress bar will be updated as students (or online pre-registration sessions) are processed.

Receive Student Data

← Help

0 Success 0 Not Imported

Session Status Details

0%

When the operation is complete, the screen will show a list of students (or sessions) that were imported, as well as a list of any errors.

Receive Student Data

← Help

2 Success 0 Not Imported

Session Status Details

100%

Session	Status
Brians, Gary (82556)	Success
Simpson, Martha (82555)	Success

Transfer Students:

The Transfer Student list shows all students who have been sent from another SchoolTool district. The students' data may have been transmitted directly from another district or sent in an STCard file (such as in an email attachment). Students whose data was sent as a file will need to be manually added to the Transfer Student list before they appear in the list to be processed; see the section on *Adding a Transferred Student* for details.

Transfer Students +							
	Original Student ID ✓	Name ✓	District ✓	Date Received ✓	Committed ✓	Course Selections ✓	UDS Data ✓
			82556	Brians, Gary	MONROE CITY CSD	9/18/2025 1:54:34 PM	NYS Digital Resources Family Questionnaire Senior Parking Privileges
			82555	Simpson, Martha	MONROE CITY CSD	9/18/2025 1:08:49 PM	AVIATION II NYS Digital Resources Family Questionnaire

Click on the Add a New Session button or use one of the following options for existing Transfer Student records:

- Print: This button allows users to generate a printable report of all data included in the session to which the user has access. This report respects all Census Module settings defined in **Maintenance > Census > Online Pre-Registration**.
- Receive Student: This button will allow users to compare the information submitted in the session with existing SchoolTool data and, once all information has been verified by the registrar, will automatically add the appropriate records to SchoolTool. (This button is not available when viewing the screen in Batch Mode. Checkboxes will be available instead.)
- Delete: This button will delete the session, as well as all information it contains, without adding any data to SchoolTool.

Online Pre-Registration

The Online Pre-Registration feature allows students and/or families to be submitted from within SchoolTool or from the external Online Pre-Registration site. Once submitted, these sessions can be edited prior to processing. In addition, new sessions can be created; see the section on *Adding an Online Pre-Registration Session* for details on creating and modifying sessions.

Online Pre-Registration +									

Click on the Add a New Session button or use one of the following options for existing sessions:

- Print Session: This button allows users to generate a printable report of all data included in the session to which the user has access. This report respects all Census Module settings defined in **Maintenance > Census > Online Pre-Registration**.
- Receive Student: This button will allow users to compare the information submitted in the session with existing SchoolTool data and, once all information has been verified by the registrar, will automatically add the appropriate records to SchoolTool. (This button is not available when viewing the screen in Batch Mode. Checkboxes will be available instead.)
- Edit Session: This button will allow users to access the session itself and modify information as needed. Editing an existing session *does not* add any

records to SchoolTool; users must still use the Receive Student  button and commit the session before any data will be added.

-  Delete Session: This button will delete the session, as well as all information it contains, without adding any data to SchoolTool.

External Registration

The External Registration feature allows students and contacts to be imported through an API or file upload. Once imported, these records can be edited prior to processing. For more information, please see *External Registration* in Online Help.

External Registration 						
	Name	Date of Birth	Date Received	Committed Date	Committed By	API Vendor
 	Alexander, Jacob	9/29/2013	9/18/2025 2:02:41 PM			
 	Michaels, Helen	6/25/2015	9/18/2025 2:02:41 PM			
 	Nichols, Ryan	9/25/2018	9/18/2025 2:02:41 PM			
 	Tyler, Frank	7/25/2014	9/18/2025 2:02:41 PM			
 	Jameson, Ralph	9/25/1991	9/18/2025 1:12:41 PM			

Click on Get Student(s) from File  to import new records or use one of the following options for existing records:

-  Receive Student: This will allow users to compare the imported information with existing SchoolTool data and receive the record. (This button is not available when viewing the screen in Batch Mode. Checkboxes will be available instead.)
-  Delete Record: This will delete the record, as well as all information it contains, without adding any data to SchoolTool.

Update Students

This area allows districts to receive changes to student information from home districts. Changes can be accepted or rejected individually or in batch. For more information, please see *Update Students* in Online Help.

Update Students  ☐ show previously rejected changes						
	Student	Date Received	Received From	Field Name	Current Value	Pending Value
 	Barnes, Carl (23933)	11/11/2022 09:37:14 AM	District Connection A	Middle Name	1st	Mark
 	Barnes, Carl (23933)	11/11/2022 09:37:14 AM	District Connection A	Mar		Brown
 	Barnes, Carl (23933)	11/18/2022 11:15:22 AM	District Connection A	Phones	Cell: (305) 439-0021 Work: (305) 439-0022 x5555 Home Phone	Cell: (305) 439-9999-100 Work: (305) 439-0022 x5555
 	Barnes, Carl (23933)	11/16/2022 11:19:31 AM	District Connection A	Contact Date		
 	Greene, Scott (26442)	10/24/2022 03:16:40 PM	District Connection A	Middle Name	Dr	Donald

Click the Refresh List icon to refresh the list without leaving the sub-module.

- Accept: Allows the user to immediately update the student information with the accepted change.

- **Reject:** The student record will not be updated and the record will be removed from the list. It can be shown again by selecting the Show previously rejected changes checkbox.

Adding a Transferred Student

This process allows you to import students from other SchoolTool district prompt you to browse and upload a student's STCard file, after which the student will appear in the Transfer Student list where you can then review the data and import into SchoolTool.

1. Browse to the file and upload.
2. Enter the passkey provided by the source district.
3. Click the **Get Student** button to upload the data.
4. The student will now be listed in the **Transfer Student** list.
5. At any time, click the Print button to view a printable report of the data that was transferred.

Receiving a Transferred Student

To review the information and import it into SchoolTool, click the Commit Session button.

Transfer Students +							
	Original Student ID	Name	District	Date Received	Committed	Course Selections	UDS Data
	29290	Thomas, Patricia N.	MONROE CITY CSD	10/21/2022 3:20:06 PM		AVIATION II	Parking Assignments
	25082	Gray, Sallie V.	MONROE CITY CSD	10/21/2022 3:20:06 PM		AVIATION II	Parking Assignments
	37487	Jones, James A.	MONROE CITY CSD	10/21/2022 3:20:06 PM		AVIATION II	
	48499	Washington, Billy J.	MONROE CITY CSD	10/21/2022 3:17:43 PM			
	41810	Thompson, Walter K.	MONROE CITY CSD	10/21/2022 3:17:43 PM			

The Commit Session area will require you to review student data and, where appropriate, specify records to update if potential matches exist.

Receive Student Data

Student

Thomas, Patricia N
Female
DOB: 3/4/2006

Home District:

Additional Information

☒ Course Selections

☒ Parking Assignments

Contacts

Spacely, Rachel
Female
Mother
Primary

Spacely, Rachel is the adult in the relationship:

☒ Create a new contact

Thomas, William
Male
Father

Thomas, William is the adult in the relationship:

☒ Create a new contact
☐ Ignore

Young, Patrick I
Male
Emergency Contact

Young, Patrick I is the adult in the relationship:

☒ Create a new contact
☐ Ignore

Addresses

171 Wasden Road
Rochester, NY 12345

No similar address exists in SchoolTool. A new one will be created.

Thomas, Patricia N
Spacely, Rachel
Thomas, William

1. **Create/Update Student:** If similar students exist, they will be listed here. Review the possible matches and choose which student to update if appropriate. When updating an existing student, use the “Overwrite All” checkbox to remove existing data and replace it with the data in this session (if this is not checked, new data will be discarded and no existing data will be modified).
 - A new Home District record may be created when using the “Overwrite All” option for an existing student or when creating a new student record. Simply select the appropriate Home District from the drop-down to create a new Home District record; the new record will include the selected Home District, the Home District Building, and the Home District Student ID provided in the transmitted data.
 - If User Defined Screens and/or course selections were included in the transmission, that data will also be imported unless you choose to discard it. To review any of the information, including the UDS data and specific course selections, click the Report  icon in the upper right corner of the screen. When the student is committed, new UDS records will be created for the student and course selections will be added appropriately. If the student already exists in SchoolTool and has a current record for that UDS the user will be prompted to end the current record and add a new one, or to simply discard the new record.
2. **Review Contacts:** For each contact, choose one of the following options and specify a relationship (SchoolTool will attempt to determine a relationship based on the transferred data and will default the relationship type to the best guess if possible):
 - **Use existing:** This option allows the user to select an existing individual and, if desired, update that person’s information by selecting the

- “Overwrite All” option (this will remove existing data and replace it with the data in this session).
 - Create a new contact: This will create a new person record for that contact using the selected relationship type and all transmitted information for that individual.
 - Ignore (not available on primary contact): This will discard the incoming contact data for this individual and will not make any changes to SchoolTool.
3. Review addresses: Each address included in the session will be displayed with a list of individuals associated with that address. If a similar address already exists in SchoolTool, possible matches will be displayed. Choose whether to use an existing address or create a new one.
 4. Once saved, the screen will refresh and display appropriate confirmations and/or errors. Select [an individual](#) to navigate to that person’s record to make any additional changes.

Name	Status
→ Thomas, Patricia N	Modified
→ Spacely, Rachel	Modified
→ Thomas, William	Modified

Adding an Online Pre-Registration Session

The Online Pre-Registration area allows registrars within the district to access pre-registration sessions submitted by individuals from outside of SchoolTool. Registrars may also create a new session from within Census, following the online pre-registration (as outlined below) to add information about new adults and children entering the district.

To direct a user to the pre-registration site, give them the URL using your district’s SchoolTool site. The link to the online registration area is specific to the district’s SchoolTool site, and should reflect that by adding “/onlinepreregistration” to the end of the web address. The address should look similar in format to one of the following:

<http://mydistrictsite.com/STweb/default.aspx> ➡

[http://mydistrictsite.com/STweb/**onlinepreregistration**/default.aspx](http://mydistrictsite.com/STweb/onlinepreregistration/default.aspx)

or

<http://mydistrictsite.com/STweb> ➡

[http://mydistrictsite.com/STweb/**onlinepreregistration**](http://mydistrictsite.com/STweb/onlinepreregistration)

1. On the Register Children screen, specify the appropriate number of children to be added using the drop-down menu.

Previous Step Pre-Register Children

< CANCEL

Use this screen to enter information about your children.

How many children are you registering today? Select One ▼

- A. Enter information about each child, keeping in mind that all fields marked with an asterisk (*) are required. When finished, click the Contacts button to continue to the next step.

Previous Step Pre-Register Children Next Step

< CANCEL CONTACTS >

Use this screen to enter information about your children.

- Fields with * are required
- When complete, click on the "Contacts" > button to continue.

[Click here to Add Another Child](#)

Child 1

First Name: Is Hispanic: ☐

Middle Name: Race: Select One ▼

Last Name: Race 2: Select One ▼

Child's Email Address: Race 3: Select One ▼

Child's Cell Phone #: Race 4: Select One ▼

Gender: SELECT ONE ▼ Race 5: Select One ▼

Date of Birth: Primary Language: Select One ▼

[Click here to Remove this Child](#)

Child 2

First Name: Is Hispanic: ☐

Middle Name: Race: Select One ▼

Last Name: Race 2: Select One ▼

Child's Email Address: Race 3: Select One ▼

Child's Cell Phone #: Race 4: Select One ▼

Gender: SELECT ONE ▼ Race 5: Select One ▼

Date of Birth: Primary Language: Select One ▼

[Click here to Remove this Child](#)

2. On the Register Students' Contacts screen, select the number of adults to be added using the drop-down menu.

Previous Step Pre-Register Contacts

< CHILDREN

Use this screen to enter information about adults that will be on the contact lists of the previously entered children.

How many contacts would you like to register today? Select One ▼

- A. Enter information about each adult contact, keeping in mind that all fields marked with an asterisk (*) are required. When finished, click

the Relationships button to continue to the next step.

3. On the Relationships screen, enter details each child-adult relationship, keeping in mind that all fields marked with an asterisk (*) are required. When all relationship details are entered, click the Addresses button to continue.
 - A. For each child, be sure to specify the child's primary contact (the person with whom the child resides).
 - B. For all adult contacts, select the appropriate relationship to that child, if applicable, and use the checkboxes to specify whether or not the contact can receive mail from the district related to the child and whether or not the contact has rights to pick up the child from school.
 - C. Enter any additional information about the contact in the Comments text field.

4. On the Residence Addresses screen, enter residence information for each adult contact.
 - A. If multiple contacts share an address, enter the address for only one contact. Select "Same as another contact" for the other contacts who share that address and use the drop-down to indicate the contact with whom those individuals share an address.
 - B. When all contacts have been associated with an address, click the Contact Info button to continue (if the district has requested

additional information, users will click on the Additional Info button before proceeding to the final Contact Info screen).

5. Depending on district settings, users may be prompted to enter additional information requested by the district. If registering multiple students, enter the information for each student on a separate screen as prompted. This might include course selections or user defined screens created by the receiving district. Check the information you wish to enter and complete the fields that appear in each section on the screen.

6. On the Contact Info screen, fill in all required fields (password and contact information for the person submitting the information).
 - A. Enter a password in the fields provided. Passwords must be between 6 and 10 characters in length with no spaces. Be sure to write down both the session key (the numeric value provided in red text) and the selected password, as these will be required to re-open an existing session.
 - B. Enter the first and last name of the person submitting this information.
 - C. Enter contact details for district registrars to use in the event there are any questions about the information submitted. Either a phone number or an email address *must* be entered.

- D. Use the comment box at the bottom of the screen to enter any additional information not already included in the previous screens as needed.
- E. When finished, be sure that both the session key and the password have been noted and then click the Save button to submit the registration information.

The screenshot shows a web form titled "Your Contact Info" with navigation links for "Previous Step", "Your Contact Info", and "Next Step". The form has a "← OTHER INFO" button on the left and a "SAVE >" button on the right. A note indicates that fields marked with an asterisk are required. The form contains the following sections:

- Session Key and Password:** A message states "Your session key is 064463". Below this are two input fields: "Password:" and "Re-Type Password:", both containing masked text.
- Contact Information:** A message asks the user to "Please enter your first name, last name, and a phone number or email address that the registrar can use to contact you if there are any questions about the information you entered during this session." Below this are four input fields: "Your First Name:" (containing "Mary"), "Your Last Name:" (containing "Jones"), "Your Email Address:" (containing "myname@email.com"), and "Your Phone Number:".
- Additional Information:** A message states "You may enter any additional information you would like the registrar to know in the space below:" followed by a large, empty text area.

- 7. Once the data has been submitted to SchoolTool, a confirmation message will display. If email notifications are enabled, an email will automatically be sent to the email address provided. Click the Exit button to end the session and return to the main online pre-registration page.
 - A. If printing is enabled, click the Print button to generate a printable report of the information submitted in this session.

Online Pre-Registration Form

Session Key: 452928

Creator's Name: Katie Copeland

Creator's Email: morgan@mindex.com

Creator's Phone Number: N/A

Created On: 10/20/2021 10:03 AM

Last Modified On: 11/03/2021 12:02 PM

DOB: N/A

Primary Lang:

Relationship Key

PC: Primary Contact

RM: Receives Mail

PU: Pick-Up

CA: Custody Alert

Children

Name: **Arrin Jones**

Gender: Non-Binary

DOB: 9/01/2006

Is Hispanic: No

Race 2: None

Race 4: None

Contacts: **Mary Jones**

Comments: None

Daniel Jones

Comments: None

Cell Phone: N/A

Email: N/A

Primary Lang: English

Race: White

Race 3: None

Race 5: None

Mother

Father

PC RM PU

Course Selections

2020-2021 High School: AVIATION II (0905)

Medication

Most Recent Physical Date: 11/1/2021

Vision Exam Date:

Hearing Exam Date:

Immunization Exemptions?: false

Please summarize exemptions: none

Conditions Requiring Medication?: true

Conditions and Medications (summarize): ADHD - Ritalin in AM

Additional Notes:

Name: **John Jones**

Gender: Male

DOB: 9/01/2006

Is Hispanic: No

Race 2: None

Race 4: None

Contacts: **Mary Jones**

Comments: None

Daniel Jones

Comments: None

Cell Phone: N/A

Email: N/A

Primary Lang: English

Race: White

Race 3: None

Race 5: None

Mother

Father

PC RM PU

Contacts

DOB: N/A

Primary Lang:

Printed On: 11/03/2021

Page 1 of 2

Receiving an Online Pre-Registration Session

To review Online Pre-Registration session information and import it into SchoolTool, click the Commit Session  button.

Online Pre-Registration +							
Session	Student(s)	Creator	Created On	Modified On	Committed	Course Selections	UDS Data
798065	Doe, Mike Doe, Molly	James, Jeffrey	9/11/2025 4:52 PM	9/11/2025 4:52:03 PM	No		NYS Digital Resources Family Questionnaire
135236	Smith, Jessie Lynn	Lloyd, Sally	9/11/2025 3:27 PM	9/11/2025 3:27:47 PM	No	AVIATION II	

The Commit Session area requires you to review student data and, where appropriate, specify records to update if potential matches exist.

Receive Student Data

Student(s)

Molly Doe
Female, DOB: 5/25/2010

Similar Student Exists in SchoolTool

Additional Information
Course Selections

REVIEW POTENTIAL MATCHES (4)

Mike Doe
Male, DOB: 6/20/2017

Similar Student Exists in SchoolTool

Additional Information

REVIEW POTENTIAL MATCHES (10)

Contact(s)

Jane Doe
Female

Similar Contact Exists in SchoolTool

REVIEW POTENTIAL MATCHES (1)

John Doe
Male

Similar Contact Exists in SchoolTool

REVIEW POTENTIAL MATCHES (1)

Addresses

1225 Roberta Lane
Rochester, NY 12345

No similar addresses exist in SchoolTool. A new one will be created.

If a similar student, contact, or address exists in SchoolTool, the **Review Potential Matches** button will show with a number of potential matches in parentheses. Click the button to review potential matches.

Potential Student Matches (7)

Create Linda A Carter
Female, DOB: 10/15/2012

Use Linda B Carter
ID: 4775
Female, DOB: 8/8/1990

Address: 1 William Drive
Rochester, NY 12345

Contacts: Theresa Simmons (Primary Contact - Mother)

Use Linda E Carter
ID: 51824
Female, DOB: 1/25/2016

Address: 21 Jasmine Street
Rochester, NY 12345

Contacts: Mary D Carter (Primary Contact - Mother)
Kevin Carter (Father)
Lisa Collins (Emergency Contact)
Christine I Rivera (Emergency Contact)

Use Linda E Carter
ID: 52859
Female, DOB: 9/19/2017

Address: 2301 Riverview Court
Rochester, NY 12345

Contacts: Elizabeth E Hyphen (Primary Contact - Mother)
Patricia M Shaw (Emergency Contact)
Kevin Hernandez (Emergency Contact)
Melvin I Carter (Father)

Use Linda J Carter
ID: 40724
Female, DOB: 2/11/2012

Address: 2109 Joanna Drive
Rochester, NY 12345

Contacts: Edward I Carter (Father)
Brenda Green (Emergency Contact)
Dorothy Carter (Primary Contact - Mother)
Maria I Jackson (Emergency Contact)
John A Carter (Emergency Contact)
Edward N Carter (Emergency Contact)

Use Linda M Carter
ID: 52859
Female, DOB: 9/19/2017

Address: 2301 Riverview Court
Rochester, NY 12345

Contacts: Elizabeth E Hyphen (Primary Contact - Mother)
Patricia M Shaw (Emergency Contact)
Kevin Hernandez (Emergency Contact)
Melvin I Carter (Father)

SELECT CANCEL

The pop-up lists the potential matches in descending order based on the level of correspondence with the original entry.

- For students, the list of existing entries shows the student name, student ID, gender, and date of birth followed by the address and contact information to the

right.

- Contacts with a custody alert attached to their record are tagged with a red flag icon for increased awareness.
- For contacts, the list of existing entries shows the contact name, gender (if specified), and phone number, followed by the address and relationship information to the right.
- For addresses, any existing similar addresses are listed below the new entry.

Either choose the **Use** radio button to the left of the existing record you wish to use, or choose the **Create** radio button to the left of the newly entered information. Once you have made your desired choice, click the **Select** button.

Student(s)

Linda A Carter
Female, DOB: 10/15/2012

Additional Information

! Senior Parking Privileges (UDS already exists)

☒ Use New ☐ Use Existing (from match)

Selection Made
Linda S Carter
ID: 41354
Female, DOB: 07/11/2008

REVIEW POTENTIAL MATCHES (7)

The Selection Made confirmation message shows a reminder of what was chosen.

- **Student**

- If you choose an existing student, the student name, student ID, gender, and date of birth will display.
 - If the incoming record and the existing record both have a User Defined Screen (UDS) attached, the Additional Information will show the name of the UDS and you can choose Use New to use the newly entered UDS information or Use Existing (from match) to use the information that already exists on the selected record.
- If you choose to create a new student, the student name, gender, and date of birth will display. An ID will not show since one has not yet been assigned.
 - If a new person is chosen with an incoming UDS that is no longer required by the district, a message stating "(UDS is no longer supported and won't be imported)" will appear next to the UDS in question.

- **Contact**

- The contact name, gender (if specified), and phone number will display.
- **Address**
 - The selected address will display.

Matching Criteria

A record is considered a match if the points achieved through various criteria totals 60 points or more. Review the following areas for more information on point totals. This information relates to both individual and batch receiving.

Student Matching Criteria

1. The person must be a student, and they must match at least one of the following properties:
 - First Name OR Last Name
 - DOB
2. If the criteria from #1 is met, then a strength value of potential match is determined using the following point system:
 - First Initial match = 5 points
 - First Name match = 20 points
 - Middle Initial match = 5 points
 - Middle Name match = 10 points
 - Last Initial match = 5 points
 - Last Name match = 22 points
 - Gender match = 10 points
 - Any DOB at all = 5 points
 - DOB match = 2 points

Note: If both the incoming student and the potential student match have blank middle names, it will be considered a match and 15 points will be added to the strength value.

Example: If the incoming person's first name is Andrea and there is already an existing Andrea, 25 points would be awarded for the matching first initial and matching first name.

Contact Matching Criteria

The criteria for potential contact matches in an Online Pre-Registration session is as follows:

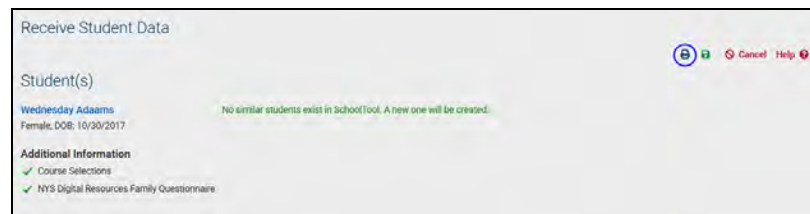
1. First Initial match = 5 points
2. First Name match = 25 points
3. Middle Initial match = 5 points
4. Middle Name match = 15 points
5. Last Initial match = 5 points
6. Last Name match = 35 points
7. Gender match = 10 points
 - If the incoming person's gender has not been selected (null), 10 points will get added to the strength.
 - If the incoming person's gender has been selected, 10 points will get added ONLY if the gender of the incoming person matches the potential person's gender.

Address Matching Criteria

The criteria for potential Address matches is as follows:

1. All results with the EXACT "StreetNumber" and part of the "StreetName".
 - Unlike Students and Contacts, there is no strength or point matching calculations for addresses.

To review any of the session information, including any UDS data and/or course selections, click the Report icon in the upper right corner of the screen.



If the session includes User Defined Screen data or course selections, a message will appear to indicate that UDS and course selection data will be imported. If a new student is created, new UDS records will be created for the student and course selections will be added appropriately.

Receive Student Data

Student(s)

Wednesday Adaams
Female, DOB: 10/30/2017

Additional Information

- ✓ Course Selections
- ✓ NYS Digital Resources Family Questionnaire

Once saved, the screen will refresh and display appropriate confirmations and/or errors. Select ➤ an individual to navigate to that person’s record to make any additional changes.

Receive Student Data

[← Back](#)
[Help](#)

The following people were added to SchoorTool:

	Name	Student ID
➤	Doe, Mary	
➤	Doe, Jane	80125

External Registration

The External Registration section of **Census > Receive Student Data** shows students whose census data has been brought into SchoolTool from the external registration API or via file upload. Based on permissions, users will be able to view the list of students and commit or delete records.

External Registration +						
	Name	Date of Birth	Date Received	Committed Date	Committed By	API Vendor
✓ ✕	Martin, Meralis	11/14/2009	8/15/2022 11:02:35 AM			
✓ ✕	Martin, Meralis	11/14/2009	8/15/2022 10:59:21 AM			
✓ ✕	Martin, Meralis	11/14/2009	8/15/2022 9:15:41 AM			
✓ ✕	Doe, John	7/8/2005	2/2/2022 1:46:50 PM		Morgan	

Click on the Receive Student ✓ button to begin the commit process for importing a student to SchoolTool. The next screen allows users to review the data for that student, the student's contacts, and their addresses.

+ Student

FIRST: Patrick
MIDDLE: Michael
LAST: Smith
GENDER: Male
DATE OF BIRTH: 7/18/2005
1ST LANGUAGE: English
STUDENT ID:
EYE COLOR:
HAIR COLOR:
HEIGHT:
WEIGHT:
EMAIL: test@mdx.com
CELL PHONE:
HISPANIC: false
RACE: White

Similar students exist in SchoolTool.
☒ Use existing Patrick Smith, Male, DOB: 08/24/1996
☐ Overwrite All
☐ Create a new student

+ Contacts

CONTACT:
SALUTATION: Mr.
FIRST: John
MIDDLE:
LAST: Doe
GENDER: Male
EMAIL: parent@mdx.com
RELATIONSHIP: Father
CELL PHONE:
WORK PHONE:
IS PRIMARY: true
IS CUSTODY ALERT: false
PARENT PORTAL: true
RECEIVES MAIL: true
PICKUP: true
RESTRICTED VIEW: false
ADDRESS: 123 Main St.
Rochester, NY 90210

No similar contacts exist in SchoolTool. A new one will be created.
Doe, John is his/her Father Primary

+ Addresses

ADDRESS:
STREET NUMBER: 123
UNIT NUMBER:
STREET NAME: Main St.
ADDRESS 2:
CITY: Rochester
STATE: NY
ZIP CODE: 90210
PHONE NUMBER:
IS LISTED: false
CONTACTS: Doe, John

Similar addresses exist in SchoolTool.
☒ Use existing 123 Main St, Rochester, NY 12345
☐ Create a new address

If a similar student exists in SchoolTool, users will be presented with a list of possible matches.

Matching students are defined using the following rules:

- When Student ID is included, both the Student ID and the Last Name must match exactly.
- When Student ID is not included, all of the following fields must match exactly: First Name, Last Name, Middle Initial (if used), Gender, and Date of Birth

If a match is identified, users can choose to create a new student or use an existing student from the list of matches. When using an existing student, an option to overwrite will be available. If the Overwrite option *is not* checked, no existing student data will be modified. If the Overwrite option *is* checked, all student data will be overwritten with the imported data (please exercise caution when using this option; if data already exists for a field in SchoolTool but is not included in the external registration session, the existing data will be removed).

Note that any fields that could not automatically be mapped to SchoolTool fields will also be able to be resolved on this screen. Required fields are highlighted in red and must be resolved in order to continue.

Student

FIRST: Betty
MIDDLE: Jane
LAST: Jackson
GENDER: 10/13/2005
DATE OF BIRTH: 10/13/2005
1ST LANGUAGE: English
STUDENT ID:
EYE COLOR:
HAIR COLOR:
HEIGHT:
WEIGHT:
EMAIL: sample@mdx.com
CELL PHONE: (585) 555-5667
HISPANIC: false
RACE: Caucasian

Similar students exist in SchoolTool.

☒ Use existing Bobby Joseph Flay, Male, DOB: 10/13/2005 ▼
☐ Overwrite All
☐ Create a new student

Once all data has been resolved, click Save. A message will appear if the student has been successfully committed.

Receive Student Data

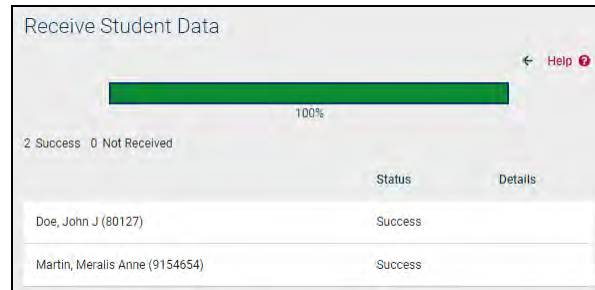
Cancel Help

Student info has been successfully received.

Name
Martin, Meralis Anne

Click the Select button to navigate to the student record in Census for that student.

If external registration students are received in batch mode, a list of students will show, including a count of students imported and not imported, along with details.



The screenshot shows a web interface titled "Receive Student Data". At the top right, there is a back arrow and a "Help" link with a question mark icon. Below the title is a green progress bar that is 100% full. Under the progress bar, the text "2 Success 0 Not Received" is displayed. Below this is a table with two columns: "Status" and "Details". The table contains two rows of data.

Status	Details
Success	Doe, John J (80127)
Success	Martin, Meralis Anne (9154654)

Import an External Registration File

Users with permission enabled can import students into SchoolTool via file upload. The file must be a .csv file and follow SchoolTool import guidelines. See the section on "External Registration File Guidelines" below for details on file format and specific field requirements.

Once the .csv is formatted correctly, click on Get Student(s) from File **+** next to External Registration to open the Receive File screen.

External Registration +						
	Name	Date of Birth	Date Received	Committed Date	Committed By	API Vendor
✓ ✗	Martin, Meralis	11/14/2009	10/21/2022 4:06:07 PM			
✓ ✗	Jones, Arnold	2/1/2006	10/21/2022 4:06:07 PM			
✓ ✗	Jones, Andrew	3/1/2007	10/21/2022 4:06:07 PM			

Click Browse to select the file to upload, and then Import.

Receive Student Data

Choose File

ExtReg.csv

IMPORT

After the import finishes, users will see detailed results.

Receive Student Data

3 Success 1 Failed

[← Back](#) [Help ?](#)

Row #	Status	Message
1	Success	
2	Not Imported	Contact (Lisa Adams) Address must have address info or phone number.
3	Success	
4	Success	

Click on the Done **←** button to return to the previous screen.

External Registration File Guidelines

General guidelines for External Registration files are as follows:

- Files must be formatted as a .CSV and must include all fields that are designated as required

- All included columns must include a column header that matches the Field Name as specified below, with the exception of contact fields, which must be prepended with a corresponding contact identifier (e.g., "Contact1_FirstName")
- Column names are *not* case-sensitive
- When updating existing students in SchoolTool, a match is defined as either of the following:
 - When Student ID is included, both the Student ID *and* the Last Name must match exactly.
 - When Student ID is not included, *all* of the following fields must match exactly: First Name, Last Name, Middle Initial (if used), Gender, *and* Date of Birth
- Students must have at least one contact, and may have no more than 20 contacts total
- Each contact must have either a home address or phone number (or both); the import file must include column headers for the home address *and* phone number fields, regardless of which columns actually contain data.
- When receiving student data in SchoolTool, one contact must be designated as "Is Primary" and only one primary contact is allowed per student

Field Details:

Field	Type/Max Length	Required?	Description
Student Fields:			
FirstName	String (30)	Y	Student's first name
MiddleName	String (30)	N	Student's middle name
LastName	String (30)	Y	Student's last name
StudentID	String (20)	N	Student ID (if using this field, only numeric characters will be accepted).
			Student's gender
Gender	String (25)	Y	Valid entries are: "male", "female", "non-binary", "m", "f", or "x" (these values are not case-sensitive)
DateOfBirth	Datetime	Y	Student's date of birth
			Valid entries include

			MM/DD/YYYY, MM/DD/YY, M/D/YY, and M/D/YYYY.
PrimaryLanguage	String (50)	N	Student's primary language
Eyes	String (25)	N	Student's eye color
Hair	String (25)	N	Student's hair color
Height	String (25)	N	Student's height
Weight	String (25)	N	Student's weight
Email	String (50)	N	Student's email address
CellPhone	String (50)	N	Student's cell phone number
IsHispanic	Boolean	N	Indicates whether or not the student is Hispanic. Possible values are "true" or "false"
Race	String (50)	N	Student's primary race
Race2	String (50)	N	Student's additional race fields (up to 5 allowed)
Race3	String (50)	N	
Race4	String (50)	N	
Race5	String (50)	N	

Contact Fields:

Students must have at least one contact, and may have no more than 20 contacts

Note: All contact fields must be prepended with a corresponding contact identifier (Contact1_FirstName, Contact1_LastName, etc.)

Contact1_FirstName	String (30)	Y	Contact's first name
Contact1_MiddleName	String (30)	N	Contact's middle name
Contact1_LastName	String (30)	Y	Contact's last name
			Contact's gender.
Contact1_Gender	String (25)	N	Valid entries are: "male", "female", "non-binary", "m", "f", or "x" (these values are not case-sensitive)
Contact1_Email	String (50)	N	Contact's email address
Contact1_Salutation	String (50)	N	Contact's salutation

Contact address fields:

Contacts must have a home address or a home phone number (or both)

** Note: If address is provided, all required fields must be included. If address is not provided, home phone is required.*

Contact1_StreetNumber	String (10)	Y*	Street number for contact's street address Required if home phone number not provided
Contact1_UnitNumber	String (10)	N	Unit number (ex: apartment number) Street name for contact's street address
Contact1_StreetName	String (50)	Y*	Required if home phone number not provided
Contact1_Address2	String (50)	N	Address 2 for contact's street address
Contact1_City	String (50)	Y*	City for contact's street address Required if home phone number not provided
Contact1_State	String (2)	Y*	State for contact's street address Required if home phone number not provided
Contact1_ZipCode	String (10)	Y*	Zip code for contact's street address Required if home phone number not provided
Contact1_PhoneNumber	String (10)	Y*	Contact's home phone number Required if home street address not provided
Contact1_PhoneNumberIsListed	Boolean	N	Indicates whether or not the contact's home phone number is listed (publicly

			available vs. unlisted)
			Valid entries are "true" or "false"
Contact1_Relationship	String (50)	Y	Contact's relationship to the student (e.g., mother, father, aunt, emergency contact, etc.)
Contact1_CellPhone	String (10)	N	Contact's cell phone number
Contact1_WorkPhone	String (10)	N	Contact's work phone number
Contact1_IsPrimary	Boolean	N	Indicates whether or not the contact is the student's primary contact
			Valid entries are "true" or "false".
Contact1_IsCustodyAlert	Boolean	N	Indicates whether or not the contact has a custody alert for that student-contact relationship.
			Valid entries are "true" or "false".
Contact1_ParentPortal	Boolean	N	Indicates whether or not the contact should have Parent Portal rights to view information about that student.
			Valid entries are "true" or "false".
Contact1_ReceivesMail	Boolean	N	Indicates whether or not the contact is designated as having Receives Mail rights for that student.
			Valid entries are "true" or "false".

Contact1_IsPickUp	Boolean	N	Indicates whether or not the contact is designated as having Pickup rights for that student. Valid entries are "true" or "false".
Contact1_RestrictedView	Boolean	N	Indicates whether or not the contact is designated as Restricted (can view limited parent portal information about that student). Valid entries are "true" or "false".

Update Students

This area allows districts to receive changes to student information from home districts. In order to receive updated student data, the student must have a currently active home district record that includes the home district student ID (and the student must also have a corresponding home district record at the other district that includes the student ID from your district). In addition, the home district must be associated with a district connection, and the district connection must be configured to receive student data changes. This logic matches the logic used to enable districts to view the Shared District Data  icon on the student record.

The Update Students grid contains a list of all incoming changes from all district connections. A change will be listed here if it meets the home district/district connection criteria described above and the incoming change is different from the data for that field in your district.

Possible changes might include basic student information (the data shown at the top of a student record). It might also include student photos, email addresses, phone numbers, and contact changes, depending on district settings. Each row in the grid will display the Current Value (the value, if any, that is currently in use in your district) and the Pending Value (this is the incoming value from the other district). In some cases, you might see a [Photo](#) link (used to show changes to student photos, if included) or a Contact Changes  report icon (used to summarize changes to a student's contacts, which must be entered manually) instead of an actual value. For phone numbers, you'll see a list of all phone numbers associated with that individual student.

Users have the ability to either accept or reject each individual change (these actions can also be performed as bulk operations when using the screen in batch mode).

To accept a change, click the Accept  button in the appropriate row.

Update Students						
 ☐ Show previously rejected changes						
	Student	Date Received	Received From	Field Name	Current Value	Pending Value
 	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Middle Name	E	Eliza
 	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Nickname		Tricia
 	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Photo	Photo	Photo Removed
 	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Secondary Language		Polish

The change will immediately be processed and the student's information will be updated to reflect the new data. Once processed, you'll see a confirmation message indicating a student record was updated and accepted changes will be removed from the grid permanently.

To reject a change, click the Reject  button instead.

Update Students

☐ Show previously rejected changes

	Student	Date Received	Received From	Field Name	Current Value	Pending Value
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Middle Name	E	Eliza
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Nickname		Tricia
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Photo	Photo	Photo Removed
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Secondary Language		Polish

The change will be removed from view but can be displayed by checking the "Show previously rejected changes" option at the top of the grid. You may choose to accept a previously rejected change at any time.

Note: If the other district changes any data that has been marked as previously rejected, the previously rejected changes will be removed and the new, incoming changes will be displayed so that they can be reviewed and processed appropriately.

Update Students

☒ Show previously rejected changes

	Student	Date Received	Received From	Field Name	Current Value	Pending Value
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:37:30 PM	District A	Eyes	blue	
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Middle Name	E	Eliza
☒ ☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Nickname		Tricia

To approve or reject changes in batch mode, be sure that you've selected the "Batch" radio option for Receive Mode at the top of the screen.

Receive Student Data

Receive Mode: ☐ Individual ☒ Batch

Contains Text:

Created Between: and

Committed:

While in batch mode, you'll see checkboxes for each item in the Update Students grid. Select the appropriate changes and then click "✓ ACCEPT SELECTED" or "✗ REJECT SELECTED" to perform the batch operation for all selected changes.

Update Students						
12 Changes (3 selected)						
☒ ACCEPT SELECTED ☒ REJECT SELECTED ☒ Show previously rejected changes						
☐	Student	Date Received	Received From	Field Name	Current Value	Pending Value
☐	Lowell, Patricia (80132)	11/14/2022 12:37:30 PM	District A	Eyes	blue	
☒	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Middle Name	E	Eliza
☒	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Nickname		Tricia
☒	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Photo	Photo	Photo Removed
☐	Lowell, Patricia (80132)	11/14/2022 12:56:42 PM	District A	Secondary Language		Polish
☒	Smith, Christopher (32384)	11/01/2022 09:26:08 AM	District A	Contact Data		

Example:

Our student, Christopher M. Smith, is associated with Home District A. All of the required configuration steps have been completed and our district has elected to receive student data changes from Home District A.

A user updates Christopher's record at Home District A to change his middle name, add a nickname, add a secondary language, and update his student photo. The user also changes his primary contact's last name and cell phone number.

Currently, the data looks like this:

Field	Our district's current value	Home District A's new value
First Name	Christopher	Christopher
Middle Name	M.	Michael
Last Name	Smith	Smith
Nickname	(no value)	Chris
Secondary Language	(no value)	German
Photo	01234-21-22.jpg	01234-22-23.jpg
Primary Contact's Last Name	Smith	Smith-Allen
Primary Contact's Cell Number	585-555-1111	585-888-8888

The incoming changes are visible in the Update Students grid. The photo changes can be previewed by clicking on the appropriate [Photo/New Photo](#) links.

Update Students						
☐ Show previously rejected changes						
Student	Date Received	Received From	Field Name	Current Value	Pending Value	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Middle Name	M.	Michael	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Nickname		Chris	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Photo	Photo	New Photo	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Secondary Language		German	
Smith, Christopher (80128)	11/14/2022 01:12:29 PM	District A	Contact Data			

Now let's say our district has decided to accept the changes to middle name and secondary language, but does not want to update his nickname or photo. They can click Accept for the changes they want to process and click Reject for the change to his nickname. Once they've completed these steps, Christopher's middle name and secondary language will be updated, and the nickname and photo changes will be listed as a previously rejected change.

Update Students						
☐ Show previously rejected changes						
Student	Date Received	Received From	Field Name	Current Value	Pending Value	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Middle Name	M.	Michael	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Nickname		Chris	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Photo	Photo	New Photo	
Smith, Christopher (80128)	11/14/2022 01:11:55 PM	District A	Secondary Language		German	
Smith, Christopher (80128)	11/14/2022 01:12:29 PM	District A	Contact Data			

To complete the updates, our district will also click on the Contact Changes report to review the changes to his primary contact (differences will be highlighted in yellow). Our user can print this report and then navigate to Christopher's student record and manually make the changes to his primary contact.

Update Students

Show previously rejected changes

Student	Date Received	Received From	Field Name	Current Value	Pending Value
X Hendricks, Jonathan (80129)	10/27/2022 10:23:00 AM	District A	Contact Data		
X Lowell, Patricia (80132)	11/14/2022 12:25:55 PM	MDX BOCEG 3	Contact Data		
X Jones, Dav					

District Student Data

Highlighted fields represent differences between District A and local data.

Student

Local		District A
Name: Smith, Christopher		Name: Smith, Christopher
Gender: Male		Gender: Male
Student ID: 99907		Student ID: 864111
DOR: 11/01/2007		DOR: 11/01/2007
First Language: English		First Language: English
Building: District B Junior/Senior High	→	Building: District A High School
Grade: 9		Grade: 9
Address: 1533 Brooklyn Road Rochester, NY 12345		Address: 1533 Brooklyn Road Rochester, NY 12345
Email: CSmith@gmail.com		Email: CSmith@gmail.com
Phone: (555) 527-7025 (Home)		Phone: (555) 527-7025 (Home)
Is Hispanic: No		Is Hispanic: No
Race: White		Race: White

Student Call Order

Local		District A
1. Carol Smith, Mother - Cell: (585) 555-1111	→	1. Carol Smith-Allen, Mother - Cell: (585) 555-0989
2. David Allen, Emergency Contact - Cell: (555) 424-9988		2. David Allen, Emergency Contact - Cell: (555) 424-9988

Contacts

Local		District A
Name: Smith, Carol		Name: Smith-Allen, Carol
Salutation:		Salutation:
Gender: Female		Gender: Female
Address: 1533 Brooklyn Road Rochester, NY 12345		Address: 1533 Brooklyn Road Rochester, NY 12345
Flags: Is Pickup, Receives Mail	→	Flags: Is Pickup, Receives Mail
Relationship: Mother		Relationship: Mother
Email: CBoorgu@gmail.com		Email: CBoorgu@gmail.com
Phones: 1. (585) 555-1111 (Cell) cell		Phones: 1. (585) 555-0989 (Cell) cell

Census > Reports

Below are examples of reports offered in the **Census > Reports** sub-module:

- BOCES
- Mailing Label Samples
- Census Report
- Student Detail
- Birthday
- Alternative
- Poll List
- Household
- Custody Type and Alert
- Zip Code Aggregate
- User Defined
- Student Modify
- Ethnicity
- Cohort
- Census Audit
- Student Mobility
- CRDC and BEDS Breakdown

To access any of these Reports, navigate to **Census > Reports**, and choose the Select  button next to the desired report.

Many of the reports available in **Census > Reports** use a pre-screen where the user may define the report criteria before running the report. Some pre-screens may use the Batch Selector to select the students for whom the report will be generated. Once the user has defined all appropriate criteria, the report may be generated by clicking on the **Run Report** button.

BOCES Report

This report is used by BOCES or RIC staff to extract this report for their own use to send to the state.

The report will generate in a new window and will show the import of the BOCES Report for Data Warehousing per your school district in a text document.

The report will follow the format indicated in the sample:

Column #s	Field Name	Description
01 – 02	DISTRICT CODE	2 digit district code

Column #s	Field Name	Description
		(PLEASE ask if you do not know)
03 – 08	STUDENT ID NUMBER	MUST be 6 digits ALL 6 digits MUST be filled in. Leading zeros MUST be present if student number starts with zero
09 – 28	STUDENT LAST NAME, FIRST NAME	Must be in the following format: Ex: Last name, First name
29 – 30	GRADE	For grade #'s 0 - 9, the # MUST BE PRECEDED By a 0. Ex: 00, 01, 02, 03, 09...
31 – 32	BUILDING CODE	Approved Building Codes
33 – 35	HOMEROOM	Optional Field
36 – 41	DATE OF BIRTH	Format MUST be MMDDYY where MM= 2 digit month DD = 2 digit day YY = last 2 digits of the year Leading Zeros must be present Ex: 012199
42	SEX CODE	Enter 1 for Male Enter 2 for Female
43	Active or Inactive	Enter A for Active Enter I for Inactive
44-46	None	Blanks
47	Disability Code	Student has a disability code
48	LEP Status	Student Limited English Proficient (LEP)

Note: This generates a text file export rather than a traditional report format.

BOC[SE]Export[1].txt - Notepad

99298016	Pots, Colin	05042210726951A	YN
99298020	Lee, Elyssa	10023720618912A	NN
99298023	Hock, Amanda	10023180501912A	NN
99298025	Bonner, Saul	10023700813911A	NN
99298026	vail, Julia	10021141015912A	NN
99298027	shear, Thomas	10022000802911A	NN
99298029	Mitchell, Shelby	10023620131912A	NN
99298034	Rivers, Lawrence	10022610221911A	NN
99298035	Rollins, Maxwell	10023260910901A	YN
99298037	Hall, Sean	10023700802901A	NN
99298039	Martinez, Nicholas	1002CAF0222911A	NN
99298041	Mitchell, Quinn	10023620913901A	YN
99298042	Bonner, Karis	10021140801912A	NN
99298043	Perry, Cornelius	10022640404911A	YN
99298044	King, David	10023260622911A	NN
99298045	Talker, Dzuy	10022120125911A	NN
99298046	Broderick, Sarah	10023260611912A	NN
99298047	Deifer, Erin	10022610924912A	NN
99298048	Moose, Ashley	10022000729912A	NN
99298389	Terry, Brian	08034020302931A	YN

Mailing Label Reports

1. Use the Batch Selector to locate the students that need labels printed, and click **Search**. From the list of found students, check all students that need labels and click **Continue**.

STUDENT RESIDENT

Search

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

☐ Random

☐ Use 'AND' for like terms

SEARCH

2. Once in the Mailing Labels pre-screen, you may click on different display options, select a sort order, and choose a report format to use.

Mailing Labels

Fields to display on the Labels

☐ Student ID

☒ Address

☒ City ☒ State ☒ Zip

☐ Grade ☐ Gender ☐ Home Room ☐ Date of Birth

☐ Phone Number

Order By:

☒ Student Last Name

☐ Address

☐ Home Room

☐ Grade

☐ Zip Code

All contacts: One per student

RUN REPORT

- There are a number of standard mailing label reports installed at implementation time. **All canned standard mailing label reports use the Avery 5160 label format.**

The following table summarizes the available mailing label report options.

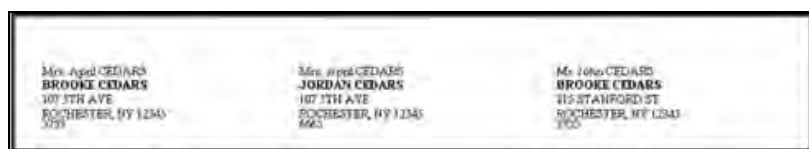
Keep in kind that your district may have additional reports added to this area.

Report Name	Shows Student information	Shows contact name	Shows "To the Parents of"	Show "RE"	1 per House or 1 per Student	Custodial, Non-Custodial, or Both	To Each Parent, Non-parent, or Both	To Mail Recipients, Non-recip., or Both	Notes
All Contacts: one per student	X	X			S	B	B	M	
Blank Mail Labels	X				S	B	B	M	Special
Blank RE labels	X	X		X	S	B	B	M	Special
Contacts only		X			H	C	B	B	Special
Mailing Label Report	X				S	B	B	M	Same as Blank Mail
Non custodial parents: Do not show student		X			H	N	B	M	See notes
Non custodial parents: Do not show student		X			H	N	P	M	See notes
One per custody household: to all parents		X			H	C	P	B	
One per household all contacts		X			H	B	B	B	
One per household, receives mail only		X			H	B	B	M	
RE: one per household		X		X	S	B	P	M	
RE: one per student to parents	X	X		X	S	B	P	M	
Student Labels: Show student only	X				S	C	B	B	See note
TO THE PARENTS/GUARDIANS OF:	X		X		S	B	B	M	
All Contacts: one per student	X	X			B	B	B	M	
Mr. and Mrs. RE: Student	X	X		X	S	B	B	M	

Note: Refer to the Maintenance Module documentation for further instructions on modifying the labels or adding new label formats.

Mailing Label Samples

All Contacts One per Student



Blank Mailing Labels



Blank RE Labels

Mrs. April CEDARS RE: Brooke CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mrs. April CEDARS RE: Jordan CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mr. John CEDARS RE: Brooke CEDARS 215 STANFORD ST ROCHESTER, NY 12345
--	--	--

Contacts Only

Mrs. April CEDARS and Mr. Tom OAKLAND 107 5TH AVE ROCHESTER, NY 12345
--

Mailing Label Report

BROOKE CEDARS 107 5TH AVE ROCHESTER, NY 12345 JCS	JORDAN CEDARS 107 5TH AVE ROCHESTER, NY 12345 KACS	BROOKE CEDARS 215 STANFORD ST ROCHESTER, NY 12345 JCS
--	---	--

Non-custodial parents: Do not show student

Mr. John CEDARS 215 STANFORD ST ROCHESTER, NY 12345

One per custody household: to all parents

Mrs. April CEDARS 107 5TH AVE ROCHESTER, NY 12345

One per household all contacts

Mrs. April CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mrs. April CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mr. John CEDARS 215 STANFORD ST ROCHESTER, NY 12345
---	---	---

One per household receives mail only

Mrs. April CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mr. John CEDARS 215 STANFORD ST ROCHESTER, NY 12345
---	---

RE: one per household

Mrs. April CEDARS RE: Brooke CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mrs. April CEDARS RE: Jordan CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mr. John CEDARS RE: Brooke CEDARS 215 STANFORD ST ROCHESTER, NY 12345
--	--	--

RE: one per student to parents

Mrs. April CEDARS RE: Brooke CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mrs. April CEDARS RE: Jordan CEDARS 107 5TH AVE ROCHESTER, NY 12345	Mr. John CEDARS RE: Brooke CEDARS 215 STANFORD ST ROCHESTER, NY 12345
--	--	--

Student Labels: Show student only

BROOKE CEDARS 107 5TH AVE ROCHESTER, NY 12345 5555	JORDAN CEDARS 107 5TH AVE ROCHESTER, NY 12345 5555
---	---

TO THE PARENTS/GUARDIANS OF

TO THE PARENTS/GUARDIANS OF BROOKE CEDARS 107 5TH AVE ROCHESTER, NY 12345 5555	TO THE PARENTS/GUARDIANS OF JORDAN CEDARS 107 5TH AVE ROCHESTER, NY 12345 5555	TO THE PARENTS/GUARDIANS OF BROOKE CEDARS 215 STANFORD ST ROCHESTER, NY 12345 5555
--	--	--

Census Report

The Census Report illustrates basic information on each student in a list. Based on the number of students selected and the information you are seeking, this report may vary.

This report utilizes the Batch Selector to find a student or students to be reported on. These could be for example, all students in a homeroom, all students in a particular class, or all students on a sports team.

This report contains the following fields of information: Student Name (first name followed by last name), Address (from primary guardian), City, State, Zip, Grade, Homeroom, Homeroom Teacher, Gender (M/F), Date of Birth (DOB), Phone Number (from primary address), and Primary Parent Name.

The default report will contain all fields and will be sorted in alphabetical order by student last name. However, users will have a pre-screen where certain information may be omitted, and the sort order may be modified.

1. Use the Batch Selector terms to locate the students needed for the report, and click **Search** (see the *Batch Selector User Guide* for more information on

searching).

- From the list of students, check or uncheck those that should apply to this report and click **Continue**.
- Once in the Census Report pre-screen, you may click on different display options and/or select a sort order to choose the specific fields to be displayed on the report. Note that if Phone Number is selected, the report will display the primary contact's Home Phone number (associated with the contact's address), if one exists, as well as the top-ranked Cell number for that contact.

Census Report

Fields to display on the Report

☒ Student ID
☒ Parent Name
☒ Address
☒ City ☒ State ☒ Zip
☒ Grade ☒ Gender ☒ Home Room ☒ Date of Birth
☒ Phone Number

Order By:

☒ Student Last Name
☐ Address
☐ Home Room
☐ Grade
☐ Zip Code

RUN REPORT

- After you have checked or unchecked the boxes or radio buttons, click **Run Report** to generate the report.

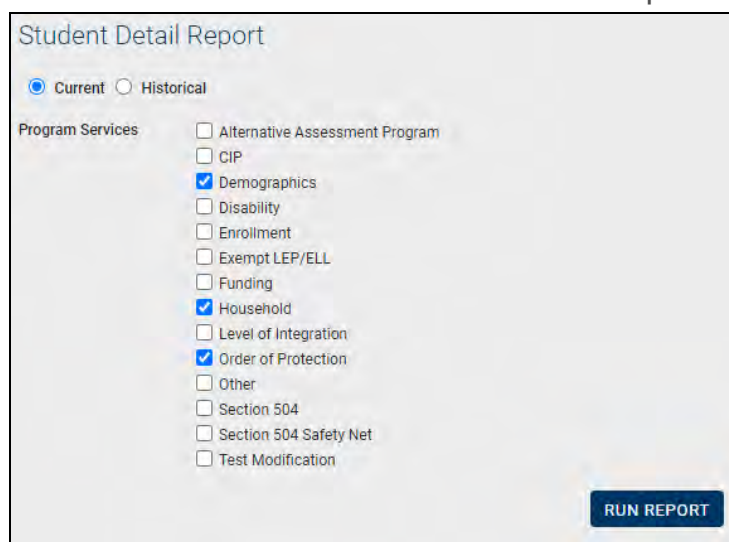
SID	STUDENT NAME	ADDRESS	CITY, ST ZIP	GR	HR	HR TEACHER	GEN	DOB	PHONE	PRIMARY CONTACT
11112429	ARABELLA ALEXANDER	907 MAIN STREET	ROCHESTER, NY 14620	11	235		X	01/20/2004	(242) 015-5683	HADLEY ALEXANDER C: (340) 81-0305
11112434	ALLA ARNOLD	1189 VALLEY ROAD	CAMPBELL HALL, NY 10849	11	320		F	11/18/2004	(214) 502-7096	GRAYVEN ARNOLD C: (313) 338-4339
11112778	BRAELYNN BARR	1735 10TH STREET	MONROE, NY 10850	12	235		F	11/02/2003	(305) 338-6983	MAVIS CABRERA C: (340) 818-8354
11112175	MARLYN BLAKE	186 LOCUST STREET	WASHINGTONVILLE, NY 10982	11	242		F	03/18/2004	(370) 069-4140	MYLA BLAKE C: (317) 958-1461
11112079	MYLA BRYANT	1790 MONROE STREET	WASHINGTONVILLE, NY 10982	11	203		M	10/04/2004	(243) 333-6968	KINLEY BRYANT C: (370) 066-5481

Student Detail Report

This report shows **one student per page** for easy viewing of each student's most recent Census information. This includes demographic details, household information, program service information, and any orders of protection. The default report shows all information, but users are provided with a prescreen where certain information may be omitted. This report can also be printed for historical data for the student.

Note: This report is similar to a "Census Verification" report used by some districts to ensure all contact and demographic details about the student are correct. However, the User Defined > Census Mailer provides a more concise view of the information, and also includes all Emergency Contacts.

1. Use the Batch Selector terms to locate the students for the report, and click **Search**. Select the desired students then click **Continue**.
2. Once in the Student Detail Report pre-screen, you may click on different display options, select whether their Program services are viewed or not and whether current or historical information is shown on the final report.



The screenshot shows the "Student Detail Report" pre-screen form. At the top, there are two radio buttons: "Current" (selected) and "Historical". Below this is a section titled "Program Services" with a list of checkboxes. The checked items are "Demographics", "Household", and "Order of Protection". The unchecked items are "Alternative Assessment Program", "CIP", "Disability", "Enrollment", "Exempt LEP/ELL", "Funding", "Level of Integration", "Other", "Section 504", "Section 504 Safety Net", and "Test Modification". A blue "RUN REPORT" button is located at the bottom right of the form.

Program Services	Selected
Alternative Assessment Program	☐
CIP	☐
Demographics	☒
Disability	☐
Enrollment	☐
Exempt LEP/ELL	☐
Funding	☐
Household	☒
Level of Integration	☐
Order of Protection	☒
Other	☐
Section 504	☐
Section 504 Safety Net	☐
Test Modification	☐

3. After you have checked or unchecked the boxes or radio buttons, click **Run Report** to generate the report.
4. If you chose to run the report with the **Current** information of **Demographics** and **Household** information without any **Orders of Protection**, the report format

would look like this:

Student Detail Report		
ACHILLES, Elizabeth		
Demographics		
Date Registered:		
SSN:	000-00-0000	
Ethnicity:	White	
Date Arrived in US:		
Origin of Birth:		
Highest Level of Education:		
International Adoption:	No	
Foster Placement:	No	
Proof of Birth:		
Maiden Name:		
Religion:		
Occupation:		
Date of Adoption:		
Last Country:		
Citizenship Status:		
English Proficiency:		
Refugee:	No	
Deceased:	No	
Registered Voter:	No	
Address		
614 OXFORD ST ROCHESTER, NY 12345 555-5555		
Contact	Relationship	Address
ACHILLES, Donald	Father	614 OXFORD ST ROCHESTER, NY 12345 555-5555

Birthday Report

This report displays all birthdays within the chosen month. This report ignores permissions to each building and lists all students within the district who have birthdays in the selected month, on a day by day basis. For example, in the month of January, on January 1st, you will see an alphabetical listing including all high school, middle school and elementary school students with a birthday on January 1.

Choose the appropriate month from the drop down list provided, then click on Run Report.

Birthdays

Please Select Month: January

[Help](#)

RUN REPORT

January Birthdays!			
January 1			
Birthday	FirstName	LastName	Grade
01/01/1998	Hannah	BRYANS	2
01/01/1999	Courtney	CAROW	1
01/01/1999	Jonathan	CEDARS	1
01/01/1998	Latosha	CHESNUT	2
01/01/1994	Victoria	CURTIS	6
01/01/1992	Michael	DANGERFIELD	8
01/01/1991	Ashleigh	RUTGERS	9
01/01/1989	Travis	RUTGERS	11
01/01/1994	Mackenzie	SIDNEY	6

Alternative Report

This report shows all students living within your district, but attending an outside provider. These students need to be tracked for state reporting.

This report could be used to verify that this information is valid. Your report should show all students living within your district, but receiving education from an outside provider with appropriate contact information.

1. Specify an enrollment date range; only students enrolled during that timeframe will be included.
2. From the radio buttons provided, select an individual school with its proper BEDS code, or select all schools outside your own.
3. Click on Run Report.

Alternative Report

All students enrolled between 10/11/2022 and 10/11/2022

Help

☒ All Schools
☐

RUN REPORT

Alternative Education Report

Monroe Central School District
03/20/2015

SCHOOL : Monroe MS
ADDRESS : 32 UNION ST
Monroe, NY 133161199
ENROLLED BETWEEN : 09/01/2014 - 03/20/2015
PHONE : (315) 245-0080

STUDENT NAME	ADDRESS	GRADE	AGE
Adams, Brian J	3150 Albatross Drive	6	12
Adams, Dorothy D	3709 Pine Level Church Road	5	10
Adams, Dorothy M	7980 Avenida De Galvez	5	11
Adams, Gary E	3709 Pine Level Church Road	6	12

Poll List Report

This report lists the residents within your district for voting purposes. This form displays each person with a signature line next to their name. The report is organized by street address and unit number (if any), with each person living at an address listed to the right.

Note: City, State and Zip code information do not display on this report.

The report will automatically generate. Once the screen refreshes, it will show the report of each resident (i.e., eligible voter) within the district. Addresses are sorted based on street name and street number, then by dwelling type.

Note: There is no way to limit the addresses or residents who appear on this report from this screen. Only addresses whose zip code match the "Default Zip Code" value in Maintenance > Application > System Options will be included in this report.

Address	Apt	Signature	Name
27 4TH AVE			NICHOLSON, Joann
35 4TH AVE			BECK, Edward
			BECK, Pamela
37 4TH AVE			ELEFANTE, Beth
41 4TH AVE			CEDARS, Miguel
			CEDARS, Luisa
45 4TH AVE			GIBES, Stacey
49 4TH AVE			BRYANS, Antonio
			BRYANS, Henriette
27 4th Ave			KHAN, Tammy

Household Report

The Household report allows you to see each house on a specific street with the names of all adults and students living there. The report is organized by street address and unit number (if any), with each person living at the address listed to the right.

Note: City, State and Zip code information do not display on this report.

Note: Any people (students or residents) who do not currently have any address listed in their record will filter to the top.

Note: There is no way to limit the addresses or residents who appear on this report from this screen.

Note: This report does not break each street onto a different page; you must use the preview pane on the left hand side of the screen to see different streets in alphabetical order.

Residents and Household Report			01/25/2007
Demo District			
Address	Apt	Name	
37 4TH AVE		BECK, Dustin Edward	
41 4TH AVE		ELEFANTE, Beth ELEFANTE, Brian	
45 4TH AVE		CEDARS, Luisa CEDARS, Miguel CEDARS, Jose Miguel CEDARS, Nora Gabriela	
49 4TH AVE		GIBBS, Stacey GIBBS, Justin Dean	
27 4th Ave		BRYANS, Antonio BRYANS, Henriette BRYANS, Marion L	
		KHAN, Tammy KHAN, Paige NICHOLSON, Joann NICHOLSON, Sara Jo	

The report will automatically generate.

Custody Type and Alert Report

This report lists all the students in a selected building that have custody issues defined by their primary contacts, custody alerts, or any orders of protection within their student record. The report lists information student by student, and includes the Student's Name, Grade, Homeroom, Homeroom Teacher, Parent/Guardian information, Relationships, Flags (i.e., Pickup? Primary? Receives Mail?), the Custody Type, Home phone number, and any notes.

Note: Because this report is specific to students in a particular building, building-level security permissions apply. This means that users who only have permission to one building will only see students with custody information in that one building.

1. Select the appropriate **Building** for which you will generate the report.
2. Use the values in the Custody Type and Alert Report prescreen to define the report:
 - A. Choose one or more Custody Types from the multi-select box. To select multiple Custody Types, hold down the **Ctrl** key on your keyboard while clicking each desired type.
 - B. Choose the type of report you want by clicking the radio button for either Custody Alert or Custody Type.
 - C. If you want Orders of Protection to be included, check the box.

The screenshot shows a web form titled "Custody Type and Alert Report" with a "Help" icon in the top right. Below the title is a "Mindex HS" label. The form contains a multi-select box for "Custody Type" with options: Sole, Joint, SO/PO, Temporary, and Emergency. To the right of this box are two radio buttons: "Custody Alert" (which is selected) and "Custody Type". Below these is a checkbox labeled "Include Order Of Protection". At the bottom of the form is a blue button labeled "RUN REPORT".

- When you have finished defining the report values, click Run Report. See the report sample for more details.

Custody Alerts High School						
Student AVERILL, Christiana	Grade: 10	Homerom: 200	HR Teacher:			
Parent/Guardian	Relationship	Pickup?	Type	Primary?	Mail?	Phone Number(s)
Paul BENTON	Grandfather	Yes	Joint	Yes	Yes	555-5555 (H)
CUSTODY ALERT	physical with grandparents					
Judith BENTON	Grandmother	Yes	Joint	No	Yes	555-5555 (H)
CUSTODY ALERT	physical with grandparents					
Custody Alert on Paul BENTON						
physical with grandparents						
Custody Alert on Judith BENTON						
physical with grandparents						
Student AVERILL, Daniel	Grade: 9	Homerom: 224	HR Teacher: GILBERT, Robert			
Parent/Guardian	Relationship	Pickup?	Type	Primary?	Mail?	Phone Number(s)
Christine HARLEM	Mother	Yes	Sole	Yes	Yes	555-5555 (H)
CUSTODY ALERT						
Custody Alert on Christine HARLEM						

Note: This report contains confidential data and should only be seen by the appropriate people within the district.

Zip Code Aggregate Report

This report would be used for postal service discounts and batch mailings to specific zip codes within your district. You start out with a selected group of people (students or residents), and the report breaks them down by the zip code that corresponds to their address, providing you with counts of people at each zip code.

This report displays a list of zip codes in numeric order, with the count to the right. A total of all people in the list of zip codes displays at the end of the report.

Note: Student and/or Resident names do not appear on this report.

- Select the appropriate tab: Student (to find student addresses) or Resident (to find adult/resident addresses).
- The Batch Selector screen will appear. Use Batch Selector terms to locate the group of people whose zip codes you are counting.
- Click Search.
- After you have selected the people that apply, click Continue. The report will automatically generate.

Zip Code Aggregate Report	
Zip Code	Count
12308	1
12345	1,666
14450	2
14580	1
14626	1
Total: 1,671	

User Defined Report

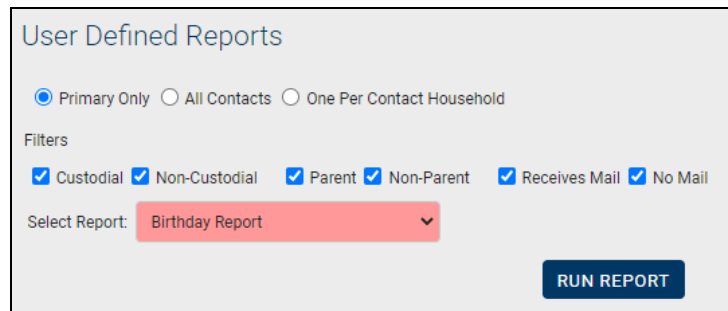
The User Defined Report area is a repository of reports that your district may have requested or paid for, which are not generally available as part of the base SchoolTool product.

Examples of User Defined Reports might include a custom Birthday report, a Census Mailer with Superintendent contact information, or a report that combines information from several other reports.

Reports may be added to this area during the implementation phase or throughout the school year.

Note: If your district does not have any User Defined Reports, this Census report option may be disabled in the **Maintenance > User/Group > Groups and Security Tree**. Contact your District Technical Contact or SchoolTool representative for more help hiding this option.

1. Use Batch Selector terms to locate the group of people for this report.
2. Click **Search**.
3. Use the check boxes to select one or more people from the list.
4. Click **Continue**. The User Defined Reports pre-screen will appear.
5. Define any pre-screen values.



The screenshot shows a web form titled "User Defined Reports". At the top, there are three radio buttons: "Primary Only" (selected), "All Contacts", and "One Per Contact Household". Below this is a section labeled "Filters" with six checkboxes, all of which are checked: "Custodial", "Non-Custodial", "Parent", "Non-Parent", "Receives Mail", and "No Mail". Under the filters, there is a "Select Report:" label followed by a dropdown menu showing "Birthday Report". At the bottom right of the form is a blue button labeled "RUN REPORT".

6. Use radio buttons to define what kind of contact information should display in this report:
 - A. Primary Only
 - B. All Contacts
 - C. One Per Contact Household
7. Use filters to further define contacts:
 - A. Custodial
 - B. Non-Custodial
 - C. Parent
 - D. Non-Parent
 - E. Receives Mail
 - F. No Mail

8. Select the report from the drop down list

Select Report: Birthday Report ▼

Birthday Report

Census Info Report

Census Info Report Little Britain

Census Info Report Round Hill

Census Info Report Taft

Student Parent Contact Information

Note: The Birthday and Census Mailer Reports are examples of canned reports that can be generated in this area. Depending on district configuration, you may have different reports listed here.

Sample User Defined Reports

Sample Birthday Report

January Birthday Report				
January 15				
Date of Birth	Student Name	Grade	Homeroom	Age on Birthday
01/15/1993	SMITH, Kaseidy	8		14
January 27				
Date of Birth	Student Name	Grade	Homeroom	Age on Birthday
01/27/1993	BARNES, Dylan	8		14
01/27/1993	BRYANS, Meghan	8		14
January 28				
Date of Birth	Student Name	Grade	Homeroom	Age on Birthday
01/28/1993	BRYANS, Miranda	8		14
January 30				
Date of Birth	Student Name	Grade	Homeroom	Age on Birthday
01/30/1993	RUTOERG, Kristopher	8		14
January 31				
Date of Birth	Student Name	Grade	Homeroom	Age on Birthday
01/31/1992	BRYANS, Luis	8		15

Sample Census Mailer

STUDENT INFORMATION	
Student Name: Black, Clara Address: 22 Dixonville Road Rochester, NY 90210	Grade: 10 DOB: 09/24/2003 Place of Birth: Newark, OH
Father: Black, Mark Address: 22 Dixonville Road Rochester, NY 90210	Employer: Home Phone: (555) 489-1566 Work Phone: (555) 429-4434 x0967 Cell Phone: (555) 427-9504 Email: MBlack@mcad.org
Grandmother: Black, Sandra Address: 31 Elbing Street Rochester, NY 90210	Employer: Home Phone: (555) 481-5695 Work Phone: Cell Phone: (555) 428-6138 Email:
Family Friend/Neighbor/Other: Cook, Nancy Address: 22 Dixonville Road Rochester, NY 90210	Employer: Home Phone: (555) 489-1566 Work Phone: (555) 425-4884 x1417 Cell Phone: (555) 427-8075 Email:
Required: Emergency Contact Name: _____ Phone Number: _____ Cell Phone Number: _____	
Parent / Guardian Signature: _____ Date: _____ Page 1 of 1	

Student Modify Report

This report shows all student records that have been modified during a specific date range. It is used to track changes with addresses, home phone numbers, and enrollment records. It does not track program services, demographic data, and notes, which have been made or modified during a period of time for future use.

1. Enter the specific date range for the changes.

Student Modify

Start Date

Help

End Date 10/11/2022

RUN REPORT

Note: The End Date is already provided for you as today's date. This is because you cannot enter an end date in the future.

- Click Run Report. The report will appear.

This column indicates that a change was made

Shows changes made to the student's record

Change Made	Current Student / Family Information
11/1/2020 STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234	STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234
11/1/2020 STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234	STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234
11/1/2020 STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234	STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234
11/1/2020 STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234	STUDENT: ARDEL, Alex Foster ADDRESS: 1000 E. 10th St ROCKFORD, IL 61104 PHONE: 815-399-1234

Ethnicity Report

There are four (4) different canned Ethnicity reports available in **Census > Reports > Ethnicity Report**. Each of these reports provides a breakdown of student populations per New York State-designated ethnic codes. However, the data in this report depends upon student Census records containing an ethnicity value.

Note: SchoolTool requires all people to have an ethnicity code. This value is found in the Demographics tab of a person record in the Census module. A default value may be determined by the District.

- Detailed Ethnicity Report:** Provides ethnicity totals per school per grade, broken down by gender. This report does NOT provide overall totals per building.

Ethnicity Report				
Totals for 11/01/2021 to 11/10/2021				
Mindex City High School	Grade	M	F	X
Is Hispanic	9	49	43	0
Multiple Races		4	4	0
White		113	88	0
Black or African American		22	26	0
Asian		4	6	0
American Indian or Alaskan Native		1	1	0
Native Hawaiian/Other Pacific Islander		0	0	0
Is Hispanic	10	39	36	0
Multiple Races		4	3	0
White		94	79	0
Black or African American		12	14	0
Asian		6	6	0
American Indian or Alaskan Native		0	0	0
Native Hawaiian/Other Pacific Islander		0	0	0

- Ethnicity Breakdown Report:** Provides a heading of each ethnicity type, with each school listed below, and gender and grade breakdowns, with totals.

Ethnicity Report				
Totals for 11/01/2021 to 11/10/2021				
American Indian or Alaskan Native				
<i>Mindex City High School</i>	Grade	M	F	X
	9	1	1	0
	10	0	0	0
	11	1	0	0
	12	1	0	0
	US	0	0	0
	GED	0	0	0
<i>Mindex City High School Totals</i>		3	1	0
<i>Mindex City Middle School</i>	Grade	M	F	X
	5	0	0	0
	6	1	0	0
	7	0	0	0
	8	0	0	0
	UE	0	0	0
	US	0	0	0
<i>Mindex City Middle School Totals</i>		1	0	0

- Immigrant by origin, school, last

OR

- Immigrant by school, origin, last:
 - These two reports provide a list of students whose last country was something other than the United States. Report includes the Country of Birth, Student First Name and Last Name, Student ID, the name of the School where the student currently Attends, Current Grade, Date of Birth, current Age, Date the student Entered the US, Date the student first enrolled in the District, and Number of years the student has been attending school in the US. Most of this information is found in the Demographics tab of a student record, though some of it also comes from the Student tab (i.e., enrollment data).

Count of Immigrant Students									
Count Of Students Initially Enrolled between: and									
Country of Birth	First Name	Last Name	Student ID	School Attending	Current Grade	Date of Birth	Age	Date Entered the U.S.	Date first enrolled in District school in U.S.

Sample Ethnicity Reports

Detailed Ethnicity Report

Provides ethnicity totals per school per grade, broken down by gender. This report does NOT provide overall totals per building.

Ethnicity Report			
Totals as of 09/14/2006			
Elementary Five	Grade	Males	Females
White	K	25	24
Black or African American		0	1
Asian		0	0
American Indian or Alaskan Native		0	0
Hispanic or Latino		1	1
Native Hawaiian/Other Pacific Islander		0	0
White	1	32	26
Black or African American		1	0
Asian		1	0
American Indian or Alaskan Native		0	0
Hispanic or Latino		1	1
Native Hawaiian/Other Pacific Islander		0	0
White	2	30	23

Ethnicity Breakdown Report

Provides a heading of each ethnicity type, with each school listed below, and gender and grade breakdowns, with totals.

Ethnicity Report Totals as of 11/14/2006			
American Indian or Alaskan Native			
<u>Elementary Five</u>	<u>Grade</u>	<u>Males</u>	<u>Females</u>
	PK	0	0
	K	0	0
	1	0	0
	2	0	0
	3	1	0
	4	0	0
	5	0	0
	6	0	0
	Ungr. Elem	0	0
<u>Elementary Five Totals</u>		1	0
<u>Elementary Four</u>	<u>Grade</u>	<u>Males</u>	<u>Females</u>
	PK	0	0
	K	0	0
	1	0	0
	2	1	1
	3	0	0
	4	0	1
	5	0	0
	6	0	0
	Ungr. Elem	0	0
<u>Elementary Four Totals</u>		1	2

Immigrant by origin, school, last / Immigrant by school, origin, last

These two reports provide a list of students whose last country was something other than the United States. Report includes the Country of Birth, Student First Name and Last Name, Student ID, the name of the School where the student currently Attends, Current Grade, Date of Birth, current Age, Date the student Entered the US, Date the student first enrolled in the District, and Number of years the student has been attending school in the US. Most of this information is found in the Demographics tab of a student record, though some of it also comes from the Student tab (i.e., enrollment data).

Count of Immigrant Students Count Of Students Initially Enrolled between and							
Country of Birth	First Name	Last Name	Student School ID Attending	Current Grade	Date of Birth Age	Date Entered the U.S.	Date first enrolled in District school in U.S.

Cohort Report

The Cohort is the year that each student has or will enter the 9th grade for the first time. In SchoolTool, this information is calculated automatically, and is displayed in the Demographics tab of the Census record. The field should be left blank in Edit mode of the student's Demographics tab, unless it is incorrect. See the Demographics Tab for more information on changing this value.

This report breaks down cohort values for a group of selected students. It details the Student IDs, Student Names and Grades, and is sorted in alphabetical order by student last name, within each cohort year.

1. Use the Batch Selector terms to locate a group of students whose cohorts you wish to review.
2. Click Search.
3. Select one or more students from the list.
4. Click Continue. The report will appear.

Cohort Report			
5/21/2020 9:41:25AM			
2016-2017			
Student ID	Last Name	First Name	Grade
28717	Ross	Michael	11*
19644	Jones	Peter	12
2017-2018			
Student ID	Last Name	First Name	Grade
21116	Richardson	Ruth	10
20262	Campbell	David	11
21692	Clark	Charles	11
19901	Cook	Timothy	11
20943	Dtrain	Robert	11
26485	Garcia	Mary	11
18458	Nelson	Elizabeth	11
19659	Spacey	Douglas	11
20106	Walker	Patrick	11
28361	Walker	Sharon	11
22240	Watson	Carl	11
27547	White	Joseph	11

Note: If students appear under the wrong cohort year, you may override individual student cohort values by accessing the Demographics tab in the student record, or you may edit the cohort by using the Batch Edit Demographics feature.

Census Audit Report

The Census Audit report shows all students that are emancipated (i.e., have no primary guardian) and/or do not have a home address. This report serves as an easy way to check and fix possible problems.

The report includes Student ID, Student Name, Grade, Homeroom, if they are emancipated or have no address, and Building where they are currently enrolled. The report lists students in alphabetical order and displays all students in the district, regardless of the individual building-specific permissions of the user. The report will generate automatically and will display in a new window.

StudentID	Student	Grade	Homeroom	Emancipated	No Address	Building
5044	ACHILLES, Adam	12	C-3	✓	✓	High School
25300	ACHILLES, Jeffrey	2	5	✓		Elementary Two
7700	ALEXANDER, Megan	10	203	✓		High School
22502	AVERILL, Delele	K		✓	✓	
5251	AVERILL, Erica	12	101	✓		High School
5910	AVERILL, Glenda	7		✓	✓	
6530	AVERILL, Inaile	9		✓		
23657	AVERILL, Jacobi	1	14	✓		Elementary Four
3032	AVERILL, Linsay	12		✓		
24723	AVERILL, Morgan	1		✓		
5461	AVERILL, Pamela	10	145	✓		
7019	AVERILL, Thomas	12	101	✓		
3957	BECK, Matthew	12	C-3	✓		
8632	BECK, Matthew	11		✓		
26240	BECK, Michael	K		✓		
23673	BENTON, Shane	1	14	✓		Elementary Four
4773	BLUES, Brandin	9	236	✓		High School
24372	BURKHART, Brandi	K		✓	✓	
347	BURKHART, Mary	9	B-4	✓		High School
25024	BURKHART, Trevor	4		✓	✓	
7705	CAPOSERRE, Kyle	4	215	✓		Elementary Two
22601	CAPOSERRE, Maggie	4		✓	✓	

This column indicates all students who may have not been given a primary contact in their student record or have moved out of the district and not been given a "known" address.

Student Mobility Report

The Student Mobility report allows users to display building-specific student enrollments that have started or ended within the specified date range.

In this report, you will find the Student ID, Student First and Last Name, Grade, School, Mobility information (when the student was enrolled in the district and/or specific building).

1. Chose a Start and End Date using the **mm/dd/yyyy** format or use the pop-up calendar to select the date range.

Note: The Start Date must be before the End Date. You cannot select an End Date in the future.

2. Choose the Building or select All from the drop-down list. (All is the default.)
3. Choose whether or not to show common enrollments: When this option is checked, the report will include "common enrollment" changes that are typically excluded from this report. These include the following:
 - A. In-district transitions that occur on the first and last day of the school year
 - B. Projected enrollment activations for incoming Kindergarten students
 - C. Transitions within the same building (e.g., changes between school levels within the same building)
4. Select exit reasons to exclude: This multi-select list allows users to specify one or more exit reasons to exclude from the report. To select multiple reasons, hold the Ctrl button and click each reason to be excluded.

Student Mobility Report

Start Date: 10/11/2022

End Date: 10/11/2022

Building: ALL

Show Common Enrollments: ☐

Exclude Exit Reasons:

- Completed grade
- Completed Highest Grade in This School - No Credential Awarded
- (459) Deceased
- (085) Earned IEP Diploma
- (102) Earned Local Certificate
- (816) Earned a High School Equivalency (HSE) Diploma
- (098) Graduated: earned Local Diploma without Regents Endorsement
- (612) Graduated: earned Local Diploma without Regents Endorsement but with CTE Endorsement
- (099) Graduated: earned Local Diploma with Superintendent Determination

Sort Order: ☒ Date ☐ Student ID ☐ Student Name

RUN REPORT

5. Click Run Report.

Student Mobility Report

Printed Date: 2/26/07 Data Start Date: 1/26/06

Building: No Building Specified Data End Date: 2/26/07

Students Entering District

Student ID	Student Name	Grade	School	Mobility Information	Start Date
8745	CAPOSERRE, Cameron	K	Elementary One		07/03/2006
22511	CAPOSERRE, Seardan C	2	Elementary One		07/03/2006
25928	HENRY, Caitlyn Jane	K	Elementary One		07/03/2006
5185	AVERILL, Michael Howard	8	Middle School		07/05/2006
6334	AVERILL, Robert T	9	High School		07/05/2006
26077	BARNES, Tegan	2	Elementary One		07/05/2006
26076	BARNES, Timothy Lee	3	Elementary One		07/05/2006
26082	BENTON, Hailey Rose	2	Elementary One		07/05/2006
23433	CAPOSERRE, Allison Louise	K	Elementary Five		07/05/2006
26154	CAPOSERRE, Alyssa	K	Elementary Three		07/05/2006
5912	CHESNUT, Nolan Ryan	7	Middle School		07/05/2006
22485	GIBBS, Ian K	9	High School		07/05/2006

Student Lite Report

The Student Lite Report allows users to print the information presented in the Student Lite View (available on the **Census > Student** tab of the Student Record) for a group of students.

From the report pre-screen, select the School Year and the Format for the report. Users may select the students for whom to print the report by using the Batch Selector.

Student Lite Report

← Back Help ?

School Year: 2021-2022

Saved Searches: NEW SEARCH

Add Search Criteria: SELECT CRITERIA

☐ Random

☐ Use "AND" for like terms

SEARCH

The report will print for all students, with one (1) page per student.

STUDENT LITE REPORT		05/21/2020
Student Name:	Walker, Joyce D	
Student ID:	000018108	
Output Field Name	Current Value	
DISTRICT CODE	NY010100	
LOCATION CODE	001	
SCHOOL YEAR DATE	2020-06-30	
STUDENT ID	000018108	
LAST NAME	Walker	
FIRST NAME	Joyce	
MIDDLE INITIAL	D	
GRADE LEVEL	12	
HOME ROOM		
BIRTH DATE	2002-01-24	
GENDER	M	
ETHNICITY	W	
HOME LANGUAGE	ENG	
CHALLENGE TYPE		
LEVEL OF INTEGRATION		
LEP PARTICIPATION		
DURATION OF LEP		
POST GRADUATE ACTIVITY		
STUDENT STATUS	A	
LAST STATUS DATE	2020-06-30	

CRDC and BEDS Breakdown

The CRDC and BEDS Breakdown view and report provide totals on male/female breakdowns, as well as additional breakdown options for Ethnicity/Race, Grade, and 504/LEP, allowing users to more quickly and easily locate information required for CRDC and BEDS reporting.

CRDC and BEDS Breakdown

Back
Help

Building: ALL
School Level: ALL
From: 7/1/2021 To: 12/30/2022

Show breakdown for:
☐ Grade
☐ Gender

Students:
☒ All
☐ Select Students

SEARCH

1. Specify the building and/or school level.
2. Enter a date range (dates must be within a single school year). Any student who was enrolled in that date range for at least one day (including the first and/or last dates of the range) will be included.

Note: Multiple enrollments in the specified range may cause duplicated counts.

3. Choose options to show breakdowns for the following:
 - Grade (this will show breakdowns for each grade within a building)
 - Gender (this will break down each building and/or grade into separate rows for male and female)
4. Choose the students you wish to include in the results (choose whether to search all or select specific students using the batch selector).
 - A. When a user clicks the Select Students option, the screen will refresh to show advanced search options. Select the appropriate terms to locate students using the batch selector (or click Cancel  to return to the main screen).

- B. Once students are selected, the radio button will show “Selected Students” (including the number of students selected). Click New Search to clear the search and find a new group of students or click Modify Search to return to the previous search criteria.

5. Click the **Search** button to view the results. The list will display at the bottom of the screen.

	H	I	A	P	B	W	M	Total	LEP	504	IDEA	IEP
Minde HS Gender: M	11	2	13	2	71	614	8	721	8	57	1	114
Minde HS Gender: F	12	0	6	2	70	559	3	652	9	34	0	66
Minde HS Totals	23	2	19	4	141	1173	11	1373	17	91	1	180
Grand Totals	23	2	19	4	141	1173	11	1373	17	91	1	180

Note: Students whose race is an inactive value may be listed, but will not be counted in Race column tallies.

The LEA, 504, IDEA, and IEP columns will display a count of students who have the corresponding program service for that column in each row. IDEA tallies are based on whether or not the student has an Other program service with a data warehouse code of 5753 (Early Intervening Services).

6. To view details on which students were included in each tally, click the Expand

button. This will display a row for each student with a dot indicating which column(s) in which the student was counted.

		H	I	A	P	S	W	M	Total	LEP	504	IDEA	IEP	
↑	Mindex HS	Gender: M	11	2	13	2	71	614	8	721	8	57	1	114
	Adams, Michael (34997)								*					*
	Adams, Richard (27069)								*					
	Adams, Robert (29438)								*					
	Adams, Thomas (20157)								*					*
	Adams, William (29004)				*									
	Allen, Amanda (25475)								*					

- Click the Print  icon to view a printable report of the results. The report will include any selected breakdowns and will be sorted based on Building, then by Ethnicity/Race, Grade, and/or 504/LEP (depending on which breakdowns are included). A grand total for all buildings will be included on the last page. Note that any expanded rows on the screen will appear on the printable report of the results.

CRDC Breakdown Report 													
7/1/2020 - 11/30/2021													
All Building School Levels													
All Students													
Breakdown Grade Level: N Breakdown Gender: Y													
Building	Gender	H	I	A	P	S	W	M	Total	LEP	504	IDEA	IEP
Mindex City High School	X	0	0	0	0	0	2	0	2	0	0	0	0
	M	172	3	19	0	64	450	11	725	5	82	1	109
	F	155	1	24	0	80	378	15	653	8	37	0	67
Mindex City High School Totals		327	4	43	0	144	828	26	1380	13	99	1	176
Mindex City Middle School	M	141	1	7	0	35	252	17	471	5	27	0	67
	F	140	3	9	1	48	252	12	463	7	14	0	40
Mindex City Middle School Totals		321	2	16	1	83	484	29	934	12	41	0	107
Mindex Elementary 1	M	56	0	2	0	19	124	19	211	0	7	0	17
	F	63	2	8	2	24	150	9	256	0	4	0	8
Mindex Elementary 1 Totals		119	2	8	2	43	274	19	467	0	11	0	25
Mindex Elementary 2	M	92	1	6	0	32	191	13	335	2	6	0	33
	F	95	3	3	0	42	171	8	309	2	1	0	43
Mindex Elementary 2 Totals		187	2	9	0	74	362	21	645	4	7	0	128
Mindex Elementary 3	M	97	1	13	0	24	151	6	294	22	10	0	40
	F	102	0	6	0	27	182	6	323	11	5	0	22
Mindex Elementary 3 Totals		199	1	19	0	51	333	12	617	33	15	0	62
Grand Totals		1153	11	95	3	363	2289	109	4853	54	173	1	316

Census > Send Student Data

The **Census > Send Student Data** area allows users to prepare groups of students for transfer to another SchoolTool district and transmit them in batches. After adding students to the list, users can enter additional information requested by the receiving district, which may include course selections and/or user defined screen data. Once students are ready to be transmitted, users will select the students to send and then transmit them in a single operation.

To begin, select a district to which you wish to transfer one or more students.

The screenshot shows the 'Send Student Data' interface. At the top, there is a dropdown menu for 'District' set to 'District B' and a status '24 Students (0 Selected)'. Below this is a blue button labeled 'ADD STUDENTS TO LIST'. The main area contains a table with columns: 'Student', 'Course Selections', 'NYS 3-8 Test Opt-Out', 'NYS Digital Access Survey', and 'Parking Applications'. The 'Student' column lists four students: Collins, Marie (32704), Cypris, Denise (42720), Garcia, Nancy (50146), and Glass, Adrian (48480). Each student name is preceded by a checkbox.

After selecting a district, you will see any students who are currently in progress for that district. If the receiving district has requested course selections and/or user defined screens, additional columns will be displayed for each piece of information.

This screenshot is similar to the previous one but highlights the additional columns: 'Course Selections', 'NYS 3-8 Test Opt-Out', 'NYS Digital Access Survey', and 'Parking Applications'. These columns are currently empty for all students.

Any course selections will appear in the grid and a green check mark will be displayed in the appropriate columns for each UDS that was added to a student.

This screenshot shows the 'Send Student Data' interface with course selections added to the 'Course Selections' column. The 'Student' column now has checkboxes next to the student names. The 'Course Selections' column contains 'High School: AVIATION II (03048)' for Collins, Marie (32704), Cypris, Denise (42720), and Garcia, Nancy (50146). A green checkmark is visible in the 'NYS Digital Access Survey' column for each student. A blue box highlights the 'Course Selections' column. At the top, there is a 'TRANSFER SELECTED STUDENTS' button and a 'REMOVE SELECTED STUDENTS' button.

Click the **Add Students to List** button to locate additional students to be transferred using the batch selector.

Send Student Data

District: District B 24 Students (3 Selected) **TRANSFER SELECTED STUDENTS** **ADD STUDENTS TO LIST** **REMOVE SELECTED STUDENTS**

☐	Student	Course Selections	NYS 3-8 Test Opt-Out	NYS Digital Access Survey	Parking Applications
☒	Coleman, Marie (32704)	High School: AVIATION II (03048)		☒	
☒	Cypris, Denise (42720)	High School: AVIATION II (03048)		☒	
☒	Garcia, Nancy (50146)	High School: AVIATION II (03048)		☒	

To remove students from the list, use the checkboxes to select the desired students and click the **Remove Selected Students** button.

Send Student Data

District: District B 24 Students (3 Selected) **TRANSFER SELECTED STUDENTS** **ADD STUDENTS TO LIST** **REMOVE SELECTED STUDENTS**

☐	Student	Course Selections	NYS 3-8 Test Opt-Out	NYS Digital Access Survey	Parking Applications
☒	Coleman, Marie (32704)	High School: AVIATION II (03048)		☒	
☒	Cypris, Denise (42720)	High School: AVIATION II (03048)		☒	
☒	Garcia, Nancy (50146)	High School: AVIATION II (03048)		☒	

To enter course selections and/or UDS data for an individual student, click the Edit  button next to that student's name.

Send Student Data

District: District B 24 Students (3 Selected) **TRANSFER SELECTED STUDENTS** **ADD STUDENTS TO LIST** **REMOVE SELECTED STUDENTS**

☐	Student	Course Selections	NYS 3-8 Test Opt-Out	NYS Digital Access Survey	Parking Applications
☒	Coleman, Marie (32704)	High School: AVIATION II (03048)		☒	
☒	Cypris, Denise (42720)	High School: AVIATION II (03048)		☒	
☒	Garcia, Nancy (50146)	High School: AVIATION II (03048)		☒	

In the pop-up that appears, check the boxes for course selections/UDS data as appropriate and enter the information requested (when adding course selections, remember to click Add  after selecting a course). If any User Defined Screens are required, they will automatically be checked and must be completed before the student can be transmitted. Click the Save  button when finished to add data for all selected screens.

☒ Course Selections
 ☐ NYS 3-8 Test Opt-Out
 ☒ NYS Digital Access Survey
 ☐ Parking Applications

Course Selections:

School Level:

Course Selections:

☒ High School: AVIATION II (03048)

NYS Digital Access Survey:

Did the school district issue your child a dedicated school or district-owned device for their use during the school year?:

What is the device your child uses most often to complete learning activities away from school? (This can be a school-provided device or another device, whichever the student is most often using to complete their schoolwork.):

After saving, the grid will update to show that data has been added for that student.

Users can also batch edit course selections and UDS information for multiple students in a single operation.

Use the checkboxes to select students to whom you wish to add course selections or UDS data. Click the Batch Edit  button at the top of the appropriate column.

Send Student Data

District: 24 Students (3 Selected) **TRANSFER SELECTED STUDENTS** Help

ADD STUDENTS TO LIST
REMOVE SELECTED STUDENTS

☐ Student	☒ Course Selections	☒ NYS 3-8 Test Opt-Out	☒ NYS Digital Access Survey	☒ Parking Applications
☒ Collins, Marie (32704)	High School: AVIATION II (03048)		☒	
☒ Cypriot, Denise (42730)	High School: AVIATION II (03048)		☒	
☒ Garcia, Nancy (50146)	High School: AVIATION II (03048)		☒	

In the pop-up that appears, enter the data as appropriate and click the Save  button.

Batch Edit NYS 3-8 Test Opt-Out

Apply to 3 selected students

CLEAR FROM 3 SELECTED STUDENTS

NYS 3-8 Test Opt-Out

School-Year: 2016-17

ELA Opt-Out:

ELA Receipt Date:

Math Opt-Out:

Math Receipt Date:

Science 4/8:

Sci Receipt Date:

Enriched Students:

Comment:

Letter Sent Date:

To remove data from the from a group of students, select the students and click the Batch Edit  button in the appropriate column. Click the **Clear from selected students** button and confirm your choice when prompted.

Batch Edit NYS 3-8 Test Opt-Out

Apply to 3 selected students

CLEAR FROM 3 SELECTED STUDENTS

NYS 3-8 Test Opt-Out

School-Year: 2016-17

ELA Opt-Out: ☐

ELA Receipt Date:

Math Opt-Out: ☐

Math Receipt Date:

Science 4/8: ☐

Sci Receipt Date:

Enriched Students: ☐

Comment:

Letter Sent Date:

To transfer a group of students after adding any necessary course selections and UDS information, begin by using the checkboxes to select the appropriate students. Click the **Transfer Selected Students** button at the top of the screen.

Send Student Data

District: District B 24 Students (2 Selected) **TRANSFER SELECTED STUDENTS**

ADD STUDENTS TO LIST **REMOVE SELECTED STUDENTS**

☐	Student	Course Selections	NYS 3-8 Test Opt-Out	NYS Digital Access Survey	Parking Applications
☒	Colin, Marie (32704)	High School: AVIATION II (33048)		✓	
☒	Cypri, Denise (42730)	High School: AVIATION II (33048)		✓	
☒	Garcia, Nancy (50145)	High School: AVIATION II (33048)		✓	

Missing records for required User Defined Screens will display a UDS Required  indicator to alert users that data is missing for the selected student(s).

Send Student Data

District: ebwae2/google 66 Students (3 Selected) TRANSFER SELECTED STUDENTS Help

ADD STUDENTS TO LIST REMOVE SELECTED STUDENTS

3 students missing required user-defined screens:

Student	NYS Digital Access Survey *	NYS 3-4 Test Opt-Out	2021-2022 Transportation Form *	Student Parking Application
☒ Adams, Elizabeth (27741)	0		✓	✓
☒ Allen, Brian (28143)	0		0	
☒ Allen, Irene (28615)	0		0	

The operation will begin and the screen will display a progress bar as the data is processed.

Send Student Data

10%

As students are sent, a list will appear to indicate the status of each transmission.

Send Student Data

100% Help

Student	Status
Collins, Marie (32704)	Failure
Dyora, Denise (42730)	Failure
Garcia, Nancy (50146)	Failure

Census Appendix – Program Services

Program services have a number of general rules that are followed. Each program service may have its own set of fields that are detailed in the appropriate program service section of this appendix.

- **Overlapping:** Most program services have a program service (such as Disability) and a program service **type** (such as Autism). As a rule, overlapping of identical program services (same program service **and** type) is not allowed. **Exceptions to this are noted.**
- **Dependencies:** Some program services require another specific program service be added first (a Section 504 Safety Net, for instance, cannot be added to a student that does not have a Section 504 program service already). **These dependencies are noted.**

Note: General, Enrollment, and Referral services cannot be batch added, ended, or removed.

The following program services can be added, ended, or removed via batch operations:

- AIS (Academic Intervention Services)
- Alternate Assessment Program (dependent on Disability)
- CIP
- Disability
- Exempt LEP/ELL (dependent on LEP/ELL)
- IEP (overlap allowed)
- Funding
- Level of Integration (dependent on Disability, no overlap allowed even at Type level)
- LEP/ELL
- Other
- Section 504
- Section 504 Safety Net (dependent on Section 504)
- Special Programs
- Test Modifications

AIS

AIS records can be created that overlap other AIS records of the same type. This is different from most other program services (except IEP).

AIS Records contain the following fields:

1. **Start** (required, date field): The start date for the program service record. This field is required.
2. **End** (radio buttons, date field): The end date for the program service record. If the record is still active, this should be set to "Current;" if the program service has ended a date should be entered here. When ending an AIS program service, an exit reason is required.
3. **Provider** (radio buttons, drop-downs): The provider for this program service. Select an in-district provider by selecting the top radio button and choosing a Building and School Level, or select the lower radio button and choose a provider from the provider drop-down.
4. **Entry Reason** (drop-down): The entry reason for the program service. "N/A" is always the top item in the list, and is selected by default. The drop-down is populated based on the reasons configured in Maintenance.
5. **Exit Reason** (drop-down): The exit reason for the program service record, used when a program service record is ended. This field is only available when a value is entered in the "End Date" field. The drop-down is populated based on exit reasons defined in Maintenance.
6. **Service or Monitor** (radio buttons): Indicates whether the student is receiving a service or being monitored. The values here are used by the PIR report. This field is set to "Service" by default.
7. **Service Type** (required, radio buttons, drop-downs): Two mutually exclusive dropdowns, one for "Academic" and one for "Support" that are controlled by radio buttons. All items are global – they apply to all school levels in the system. Each option is required to be tied to one of the AIS service types used in the PIR report.

Note: Setting the Service Type to "Academic" will cause the AIS  icon to appear on the student's record in the Alerts area. If the Service Type is set to "Support" the icon will not display.

- A. **Academic** drop-down contains the following Service Types (as defined in Maintenance):
 - i. ELA
 - ii. Math
 - iii. Social Studies
 - iv. Science
- B. **Support** drop-down contains the following Service Types (as defined in Maintenance):
 - i. Guidance Counseling
 - ii. Psychological Services
 - iii. Social Worker Services

- iv. Health, Dental, and Eye
- v. Other Services
- 8. **Intervention Type** (drop-down): Optional drop-down containing the various intervention types as defined in Maintenance
- 9. **Frequency/Intensity** (drop-down): Optional drop-down containing the options for frequency/intensity types as defined in Maintenance
- 10. **Teacher** (drop-downs): List of all teachers in the system with filters for Building, School Level, and Department to assist in narrowing down selection
- 11. **Not funded by Title 1 funds** (checkbox): This should be checked when the faculty member providing this program service is not funded by Title 1 funds.
- 12. **Comments** (free-text): A multi-line text box allows users to add details about the service, which may run for an entire school year or more.

The screenshot shows a web-based form for entering an AIS record. At the top left is a dropdown menu labeled 'AIS'. In the top right corner are 'Help' and 'Cancel' buttons. The form contains several sections of input fields: 'Start' and 'End' date pickers; 'Provider' with a dropdown showing 'Mindex HS' and 'High School'; 'Entry Reason' and 'Exit Reason' both set to 'N/A'; 'Service or Monitor' with radio buttons for 'Service' and 'Monitor'; 'Service Type' with radio buttons for 'Academic' and 'Support', each followed by a 'SELECT ONE' dropdown; 'Intervention Type' set to 'N/A'; 'Frequency/Intensity' set to 'N/A'; a section for 'Building', 'School Level' (dropdown with 'ALL'), and 'Department' (dropdown with 'ALL'); 'Teacher' with a dropdown showing 'Mindex HS' and a 'SELECT ONE' dropdown; and a large 'Comments' text area at the bottom.

Entry screen for an AIS record

Alternate Assessment Program

The Alternate Assessment Program is used for students who receive services as part of the NYSAA program. When alternate assessments are administered for these students, that exam score is used for NYS data warehouse reporting. This program service works in conjunction with the Disability program service. A student must have a Disability program service before users can add an Alternative Assessment Program record.

Entry screen for an Alternate Assessment Program record

CIP

CIP (Classification of Instructional Programs) program services are used for students attending NYS qualifying vocational-technical classes (e.g., cosmetology, welding, etc.). These programs are determined by the state and are maintained in **Maintenance > Census > CIP Programs**. CIP records work in conjunction with diploma types and a technical endorsement exam reported to the NYS data warehouse.

Entry screen for a CIP record

Disability

The Disability program service may be used when a student is classified as “Disabled” according to NYS definitions of qualifying handicaps. Districts may use this program service type to drive the IEP Direct viewer feature or in conjunction with the “needs” feature of SchoolTool.

Entry screen for a Disability record

Exempt LEP/ELL

Exempt LEP/ELL program service records are used in conjunction with LEP/ELL records; a student must have an LEP/ELL record before an Exempt program service record may be added.

Exempt LEP/ELL

Exempt LEP/ELL: Exempt from Cohort (LEP/ELL)

Start: [Calendar Icon] End: [Calendar Icon] ☒ Current

Provider: ☒ Mindex HS High School

☐ SCHWIL (280215090001)

Help [?] Cancel

Entry screen for an Exempt LEP/ELL record

IEP

The IEP, or Individualized Education Program, program service is used to indicate that a student has an IEP. Detailed information about that student's IEP may be available through the district's special ed software (such as IEP Direct or Cleartrack).

IEP

IEP: IEP

Start: 9/1/2021 [Calendar Icon] End: [Calendar Icon] ☒ Current

Provider: ☒ Mindex HS High School

☐ SCHWIL (280215090001)

Help [?] Cancel

Entry screen for an IEP record

Funding

The Funding program service may be used to indicate when a student receives program services that are tied to programs receiving funding for instruction (e.g., Federal Title monies, NCLB programs, etc.).

Funding

Funding: (0286) Title I - Part A: Improving Basic Programs - Targeted Assistance Program

Start: [Calendar Icon] End: [Calendar Icon] ☒ Current

Provider: ☒ Mindex HS High School

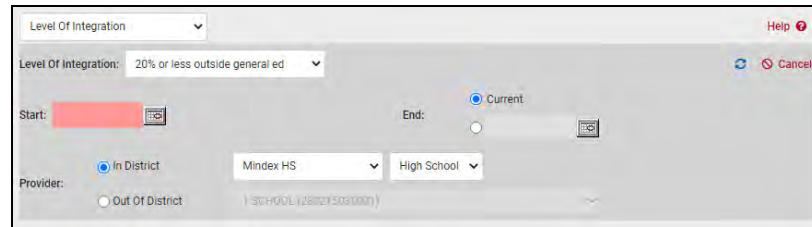
☐ SCHWIL (280215090001)

Help [?] Cancel

Entry screen for a Funding record

Level of Integration

The Level of Integration program service is used in conjunction with Disability records; a student must have a Disability program service before a Level of Integration record may be added. Level of Integration records indicate how much time (typically a percentage value) the student is serviced for that disability. If a district records a disability in SchoolTool for the purpose of NYS reporting then they also maintain the level of integration for that disability.



Entry screen for a Level of Integration record

LEP/ELL

The LEP/ELL program service is used for students who are not English-proficient. Students must qualify for an LEP/ELL program using a state language proficiency exam.

- **Eligibility:** Indicates that the student is determined to be eligible for LEP/ELL programs; a record for this option must be selected before a program-specific record may be created.
 - When creating an Eligibility record, use the Service Level dropdown to select the appropriate value (Full, Partial, or None)
- **Program:** Once a student has been qualified for an ELL (English Language Learner) program, typically either a Bilingual Program or a freestanding ESL program, this radio button should be used to indicate the program for which the student is receiving services.

Note: A single Eligibility record must exist for the duration of all individual LEP/ELL Program-specific records.

LEP/ELL

LEP/ELL: ELL

Eligibility: ☒ Eligibility ☐ Program: Transitional Bilingual Education (TBE/Translang)

Start: 3/9/2020 End: ☒ Current ☐

Provider: ☒ Mindex ES1 ☐ Elementary

Service Level: Full

Entry screen for an LEP/ELL record

Other

Other program service records may be used at a district's discretion and may be tied to NYS export codes, such as subject-specific summer school or free/reduced lunch programs. Some program services may have additional fields. Refer to the NYS SIRS Manual for more information on these program services.

Other

Other Program: (5817) Free Lunch Program

Start: 7/1/2021 End: ☒ Current ☐

Provider: ☒ Mindex MS ☐ Middle School

Eligibility: (Choose 1-6 items) ☐ DCMP ☒ APPLICATION ☐ HOMELESS ☐ MIGRANT ☐ RUNAWAY ☐ FOSTER ☐ FDIPIR ☐ HSTART ☐ CARRYOVER

Entry screen for an Other record

Section 504

Section 504 program services are used for students who are classified as eligible for Section 504 services and accommodations, such as students with medical needs, learning disabilities, and/or emotional or behavioral disabilities. Students with a Section 504 program service record may also have a Disability record; they may also have a Section 504 Safety Net for eligibility in one or more subjects.

Section 504

Section 504: 504 Plan

Start: 8/1/2021 End: ☒ Current ☐

Provider: ☒ Mindex HS ☐ High School

Entry screen for a Section 504 record

Section 504 Safety Net

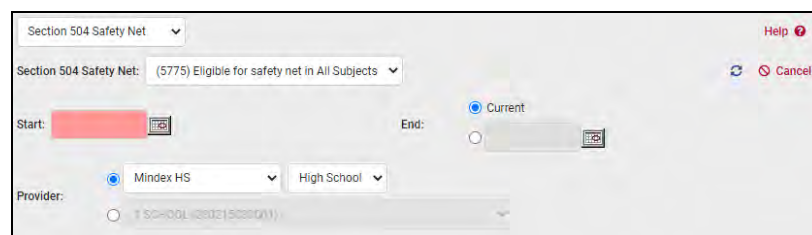
In order to add a Section 504 Safety Net record, the student must already have a current Section 504 program service record set up. To add a Section 504 Safety Net, select the appropriate option from the Safety Net drop-down and specify a Start Date, End Date, and Provider.

Available Section 504 Safety Net types include the following:

- Eligible for safety net – graduation requirement in English
- Eligible for safety net in Math
- Eligible for safety net in Global History & Geography
- Eligible for safety net in US History & Government
- Eligible for safety net in Science
- Eligible for safety net in All Subjects

A student may have multiple Safety Net records with have overlapping dates, as long as the records are different Safety Net types. For example, a student may have 3 *different* subject-specific Safety Nets, such as Math, English, and Science, at the same time. Subject-specific safety net records may also overlap with the “All Subjects” type.

A student *may not* have more than one of the *same* type for overlapping dates. If a user attempts to add a conflicting safety net record, a message will appear to indicate the conflict and the record cannot be added until the dates are changed.



Entry screen for a Section 504 Safety Net record

Special Programs

Special programs are used for students receiving services that are associated with a specific cost. These programs are defined in Maintenance and are typically used for BOCES billing purposes. Special Programs may include yearly (e.g., 12:1:1 or 1:1 Aide programs) or weekly (e.g., speech therapy or counseling) services. Each Special Program is defined as either a Program or a Related Service.

Entry screen for a Special Program record

1. Select a school year, then choose a Special Program from the drop-down (the list is dependent on the school year selected; only Special Programs that have a school year defined will appear in the list for that year). Specify a start date (and end date, if appropriate). If the Special Program is defined as a Related Service, an option will appear to tie that record to a Program. The “Tie to Program” drop-down will include any Program types that exist for that student. Select the Program to which you want to tie the Related Service (date ranges for Related Services must be within the range of the associated Program record).

Note: This option is not available when batch adding program services records in the Census module.

2. Enter a Frequency or FTE as appropriate.
 - A. If the Special Program is billed *weekly*, enter a Frequency to indicate the number of times per week that the student receives these services.
 - B. If it is billed *yearly*, enter a value for the Full Time Equivalent (FTE).
3. Specify whether the student is receiving group or individual service. Select a provider. If appropriate, choose a faculty responsible for administering or overseeing the service (this field is optional).

Test Modification

If a student's IEP document (from special ed software) says the student can utilize testing modifications for an exam, then the district ensures the modification is available should the student need it (e.g., someone reads the exam to the student, the student is allotted extra time; the student needs a Braille exam, etc.).

Note: The proper place to note the test modifications that a student has actually utilized is when an exam score is submitted (either by a teacher or counselor). When an exam

score is submitted as taken “with modifications,” this information is reported to NYS data warehouse along with the exam score.

The screenshot shows a web-based form for entering a test modification record. The form is organized into several sections:

- Test Modification:** A dropdown menu at the top left, currently showing "Test Modification".
- Start/End:** Fields for "Start:" and "End:" with calendar icons. The "End:" field has a radio button labeled "Current" which is selected.
- Provider:** A dropdown menu showing "Mindex HS" and "High School". Below it is a text input field containing "1.SCHEDULE (280E1309000)".
- Flexible Scheduling:** A section with checkboxes for "Extended Time", "Several Sessions During the Day", and "Other: Specify". The "Extended Time" checkbox is selected, and there are radio buttons for "1.5X", "2.0X", and "Other".
- Flexible Setting:** A section with checkboxes for "Individually in Separate Location", "Small Group in Separate Location", and "Other: Specify".
- Revised Test Format:** A section with a text input field.
- Revised Test Directions:** A section with checkboxes for "Read Directions to Student", "Simplify Language in Directions", "Provide Additional Examples", and "Other: Specify".

At the top right, there are links for "Help" and "Cancel".

Entry screen for a Test Modification record

Index

A

Add a New Person Record 116

Add Personal Information 21

Adding a Mailing Address 44

Adding a New Contact 19

Adding a New Residence Address 35

Adding a Transferred Student 158

Adding a Work Address 47

Adding a Work Phone and/or Employer Name 49

Adding an Entire Family 111

Adding an Online Pre-Registration Session 160

Adding or Editing a Home Phone Number 42

Adding Program Service Records 88

Addresses Tab 34

AIS 216

Alternate Assessment Program 218

Alternative Report 194

B

Batch Add Program Services 142

Batch Add Projected Enrollments 132

Batch End Program Services 144

Batch Enrollment Start 130

Batch Remove Program Services 146

Batch Remove Projected Enrollment 133

Birthday Report 193

BOCES Report 185

C

Census > Add Family 110

Census > Add Person 115

Census > Batch Edit Demographics 119

Census > Batch Enrollment 121

Census > Batch Program Services 141

Census > Census Search 106

Census > Receive Student Data 151

Census > Reports 184

Census > Send Student Data 209

Census > Student Record 7

Census Audit Report 204

Census Module Overview 5

Census Report 190

Census Sub-modules 6

CIP 219

Cohort Report 203

Contacts Tab 17

Controlling Contact Rights 28

CRDC and BEDS Breakdown 207

Current Program Services View 81

Custody Type and Alert Report 196

D

Define Relationships 24
Defining Contact Call Order 31
Delete a Person (Student) 109
Deleting Program Service Records 90
Demographics Tab 60
Detailed Ethnicity Report 202
Disability 219

E

Edit Special Education Information for a Student 84
Editing Contacts 22
Editing Program Service Records 89
Email Addresses 13
Emancipating a Student 56
Ethnicity Breakdown Report 202-203
Ethnicity Report 201
Exempt LEP/ELL 219

F

Finding a schooltool District 104
Funding 220

G

General View 82

H

Home District View 90

Household Report 195

I

IEP 220

Immigrant by origin

school

last 203

Immigrant by school

origin

last 203

L

LEP/ELL 221

Letters Tab 92

Level of Integration 220

M

Mailing Label Reports 187

Mailing Label Samples 188

Modifying a Person Record 107

Modifying/Editing an Existing Address 43

Moving a Family to a New Address 52

Moving Former Residents out to Unknown Addresses 50

Moving Out of a Work or Mailing Address 49

N

Notes Tab 96

O

Other 222

Overriding a Cohort Value 61

P

Personal Information Section 8

Poll List Report 194

Program Services Views 87

R

Receiving a Transferred Student 158

Receiving an Online Pre-Registration Session 165

Referral View 85

Reviewing the Job Object History 148

S

Sample Ethnicity Reports 202

Sample User Defined Reports 199

Section 504 222

Section 504 Safety Net 222

Set Contact Details 26

Special Programs 223

Special Programs View 91

Student Detail Report 191

Student ID Numbers 82

Student Lite Report 206

Student Lite View 86

Student Lockers 84

Student Mobility Report 205

Student Modify Report 200

Student Tab 62

T

Test Modification 224

Transferring Student Data 101

U

User Defined Report 197

User Defined Tab 94

V

Viewing Contact History 32

Viewing the Residence History 58

W

Work Addresses 47

Z

Zip Code Aggregate Report 197