ADVANSYS

ADULT EDUCATION MANAGEMENT SYSTEM

Training Manual

Level 2

REVISED:

March 1, 2013

benchmark

Integrated Technology Services

Contents

Trouble Shooting

PANIC SITUATIONS

The majority of Panic Situations related to information showing on the Federal Tables can be debugged by answering 6 questions:

1) Did the student have an active registration during the fiscal year?
2) Was the student enrolled in a class in your program during part or all of the fiscal year?
3) Does the student have 12 hours of attendance in the fiscal year? (And for Table 4.1 is that attendance in your program?)
4) Are the attendance hours **approved?**
5) Does the student have at least one assessment on his record in the current fiscal year?
6) Is the assessment entry for that fiscal **approved?**

The odds are that by answering these questions, and making the associated corrections your Federal Table reports will contain the information you expect.

In addition to Table questions, here are some Panic situations that commonly arise.

Panic Button Situation 1

<u>Student doesn't show on Table 4</u>

I ran a Table 4 (or 4.1) Names List and one of my students isn't showing up! The system is broken!

Before you panic, check the following:

7) Did the student have an active registration during the fiscal year?
8) Was the student enrolled in a class in your program during part or all of the fiscal year?
9) Does the student have 12 hours of attendance in the fiscal year? (And for Table 4.1 is that attendance in your program?)
10) Are the attendance hours **approved?**
11) Does the student have at least one assessment on his record in the current fiscal year?
12) Is the assessment entry for that fiscal **approved?**
13) Did you check his state of residence? Is the report filter set to "All States"?

Panic Button Situation 2

Student Gain doesn't show on Table 4

I ran a Table 4 (or 4.1) Names List and one of my students isn't showing a gain! The system is broken!

Before you panic, check the following:

1) Did the student have an active registration during the fiscal year?
2) Was the student placed in a class in your program during part or all of the fiscal year?
3) Does the student have 12 hours of attendance in the fiscal year? (And for Table 4.1 is that attendance in your program?)
4) Are the attendance hours **approved?**
5) Does the student have at least one assessment on his record in the current fiscal year?
6) Is the assessment entry for that fiscal **approved?**
7) Are the test entries sufficient to generate a gain?
8) Is the gain above the level of the student's entering EFL for that fiscal year? NRS rules require this. (See Example)

EXAMPLE:

Ms. Doe entered in another program as an NRS Registration on 07/01/2012 with an EFL of High Intermediate ESL (06). She then entered in your program on 11/06/2012 with an EFL of Low Intermediate ESL (06).

Since the earliest registration had an EFL of High Intermediate ESL (06), then THAT is the EFL used for Completion calculation for Table 4 Purposes.

Even though she showed enough of a gain in YOUR program to Advance to High Intermediate ESL (06), the System (State) will not get that gain on the Aggregate Report because High Intermediate ESL (06) WAS her entering EFL.

Basically, she was High Intermediate ESL (06) on 07/01/2012 when she FIRST entered into ANY program and has not completed that level so there is NO completion for Table 4.

THE REASONING:

When a student is enrolled in two or more programs and has a different Entering EFL for each, NRS guidance directs that the Entering EFL for all aggregate tables be established as the FIRST entry in the system for the fiscal year.

Panic Button Situation 3

<u>Student doesn't show on Table 5</u>

I ran a Table 5 (or 5.1) Names List and one of my students isn't showing up! The system is broken!

Before you panic, check the following:

1) Did the student have an active registration during the fiscal year?
2) Was the student enrolled in a class in your program during part or all of the fiscal year?
3) Does the student have 12 hours of attendance in the fiscal year? (And for Table 4.1 is that attendance in your program?)
4) Are the attendance hours **approved?**
5) Does the student have at least one assessment on his record in the current fiscal year?
6) Is the assessment entry for that fiscal **approved?**
7) Has the student been separated in that fiscal?
8) Does the student have the appropriate Status to generate the automatic goal?
9) Did you check his state of residence? Is the report filter set to "All States"?

Panic Button Situation 4

Students placed in wrong rows on the federal tables

My program only serves ABE/ASE students and there are students with ESL beginning EFLs on my Tables (or vice versa)! The system is broken!

Before you panic, here's the most likely scenario:

1) Since the ADVANSYS system allows for multiple co-existing registrations, we had to develop a method to determine what the ENTERING EFL for a student would be for aggregate reporting purposes.
2) After discussion with NRS officials and testing different scenarios in the system, it was determined that the FIRST registration for a student in the fiscal year (as determined by DATE OF REGISTRATION) would establish the entering EFL. The only exception to this is if the first registration never tests the student and therefore never establishes the EFL.
3) This means that if John Q Student enrolled at Program A as an ABE student on July 1 and later enrolled at Program B as an ESL student on September 2; all Federal reports will show John Q Student with an entering EFL as established by testing at Program A. When running an aggregate Table 4, Program B will show that student in the row for ABE students even though Program B may only serve ESL students.

Panic Button Situation 5

Can't enter a test

I'm trying to enter a test and the system won't let me. The system is broken!

Before you panic, here are a few likely scenarios:

Hour of attendance needed:

1) Table 4 (and all federal tables built from its logic including 4.1, 4B and 4C) makes a distinction between a student "COMPLETING" a Level (Column D) and a student "ADVANCING" to the next (Column E).
2) The directions for populating the two columns reads: *Column E represents a sub-set of Column D (Number Completed Level) and are learners who completed a level and enrolled in one or more higher levels*
3) After discussion with NRS it was determined that the criteria for advancement was attendance since continuing in the program indicated enrolling in the higher level. We were also told at the time of those discussions that Column D and E should (in theory) not match.
4) In order to maintain data integrity the ADVANSYS system enforces the logical rule that an ADVANCE (via attendance) must follow a COMPLETION before any additional assessments can be entered.

5) Entering an hour of attendance on or after the date of the test that triggered the completion will move the student from COMPLETED to ADVANCED and allow the entry of additional assessments.
6) NOTE: This becomes problematic when a student has an assessment that triggers a gain in a previous fiscal year and no attendance is entered. The problem comes in that Table 4 rules require Column E to be a subset of Column D. Since the COMPLETION was registered in a previous fiscal year, the ADVANCE cannot be posted in the current fiscal. In this case we typically have to go back into the previous fiscal year and "force" an hour of attendance in the database in order to trigger the advance and allow testing to continue. This can complicate federal reporting as it will change data that may have been submitted.

Simple rule to remember: Tests trigger completions, hours trigger advances.

At the highest Level of ESL:

1) Once a student "tests out" of ESL Level 6, ADVANSYS allows no additional tests to be entered.
2) By rule. Students who have tested out of ESL Level 6 should be separated and re-enrolled as ABE/ASE students.

Panic Button Situation 6

Student's EFL Level seems wrong

My student shows a green bar on his Table 4 Achievement, but his EFL says "Continued in Same Level" (or "Regressed a Level"). The system is broken!

Before you panic, this scenario can and will happen. And it is supposed to!

1) ADVANSYS differentiates between an EFL gain and Advancement for the purposes of Table 4. The student's overall EFL operates independently of his Table 4 status.
2) EFL is determined by the lowest score on a battery of tests. So if the student is taking the CASAS battery and is currently testing in Reading, Writing and Listening the overall EFL is determined by the lowest score of the three. In this case if the student tested at Level 2 in Listening, Level 2 in Writing and Level 3 in Reading, his overall EFL would be Level 2. In this scenario the student would be required to improve both Listening and Writing to at least Level 3 to change his overall EFL status.
3) Take the same scenario above and consider Table 4 status. Completions for Table 4 are determined on a test-by-test basis. If the student in that scenario improved Listening to Level 3 while Writing remained at Level 2 and Reading at Level 3, a completion would be established on Table 4. Overall EFL remains at 2, status reads "Continued in the Same Level" but a completion is triggered on Table 4. By the same token, the student could regress to Level 1 in Writing and improve Reading to Level 4. Overall EFL would show "Regressed" but again, the student would qualify for a Table 4 completion.
4) Caveats:
    a. Student must improve a score higher than the entering level. Starting at Level 2, regressing to a Level 1 and improving back to a Level 2 will not qualify for a Table 4 completion.
    b. Student must meet all other qualification criteria to be included on Table 4 (see Panic Situation 1).

Panic Button Situation 7

I Can't Enter Attendance

I went to enter attendance for the students in a class, but when I got to the student page the message says: There are no dates available for the student. The system is broken!

Before you panic, there is usually one reason this happens. Check the student's Class Placement Date.

The entry of attendance built from three basic parts.

1) Class Beginning and Ending Dates. This parameter from the Class Creation Module establishes the available dates for the class.
2) Class Schedule. This parameter from the Class Creation module establishes the days and hours per day that will be available between the beginning and end dates.

   If the Class Beginning and End Dates and Schedule days are correct, the issue almost always lies with item #3

3) Class Placement Date. When a student is placed in a class, he/she must be assigned a placement date. This placement date determines the first day for which the student is available for attendance entry.

If the class is set to meet from July 1 to December 31 but the placement date for the student is set at September 20, the July meetings, the August meetings and the September meetings until the 20th will not be available.

Can this be fixed? Yes.

The current process is slightly tedious, but new version releases will streamline the process in the future. As of October 1, the process is as follows:

1) Navigate to the Change/Add Classes link for the student in the snapshot profile box.
2) Under the Class Placements is a list of each class in which the student is placed and the associated placement date.
3) Since no attendance has yet been entered, the DELETE option is available.
4) Delete the Class Placement and then place the student back in the class. Make sure to edit the Placement Date to the correct entry.
5) If the student has a billing entry created for the erroneous class placement, navigate to the Billing History, edit and remove the line item for the incorrect entry.

USING FEDERAL TABLES

The Table 4 Names and Table 5 Names Report are not "official" Reports.

The "Names" reports will display the individual students that are reported on the Federal Table 4 & 5 Reports.

These are useful in pinpointing any possible omissions and inclusions that may be in error.

The included information on these reports are:

- Student ID
- Name
- Completed (Y/N)
- Advanced (Y/N)
- Program(s)

NRS REGISTRATION REPORT

The NRS Registration Report contains valuable information regarding a student's progress and can be of great help in determining why a student may not be appearing on a Federal Table. The information included on this report is:

- Student Name
- SSN/EIN
- Date of Birth
- Employment Status
- NRS Hours
- Last US Grade
- Last Non-US Grade
- Is Data Matching

For example: If a student on the NRS Registration report has all their information entered in the system, but the NRS Hours are less than 12.0 then they are NOT going to show on a Table Report.

Trouble Tickets

BREAK FIXES V. WISH LISTS

Before a ticket is submitted to support, it is important to do a couple of things first:

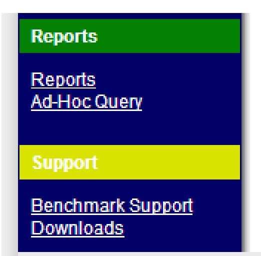
- Do some troubleshooting.
    - Is this issue covered in the Panic Situations?
    - Have I tried the recommended resolutions?
    - Have I seen this before?
- Determine the type of issue.
    - Is this a “break” that needs fixing?
    - Is this something that the system does not currently do but you would like to see? (Enhancement)

If this is an Enhancement Request v. an issue, please include “Enhancement Request” as the beginning of the Title of the ticket. (See Adding a Ticket.)

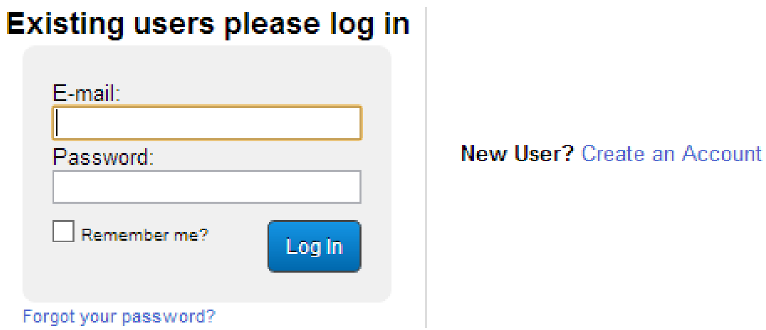
SUBMITTING TROUBLE TICKETS

In February of 2013, the Ticketing System was updated to the OnTime Portal System. This migration is an effort to streamline the ticketing process and enable support to better respond to tickets as well as track common issues within the system to better plan updates and enhancements.

To submit a trouble ticket, click on the link for support from any of the screens within the system.

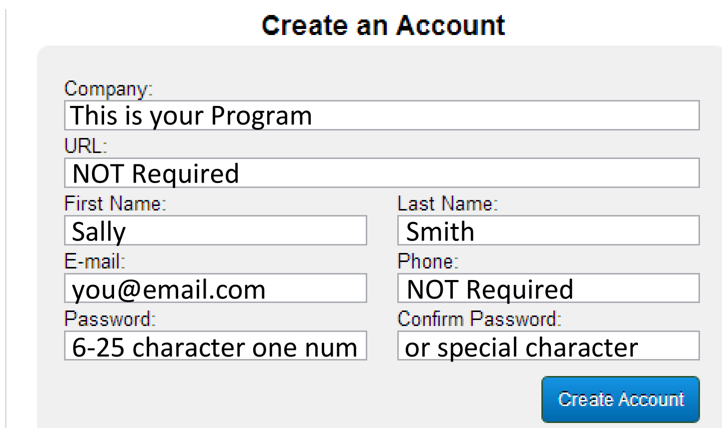


Enter your e-mail and password to log in to the system. If you have never submitted a trouble ticket in the new system, you will first need to establish an account.



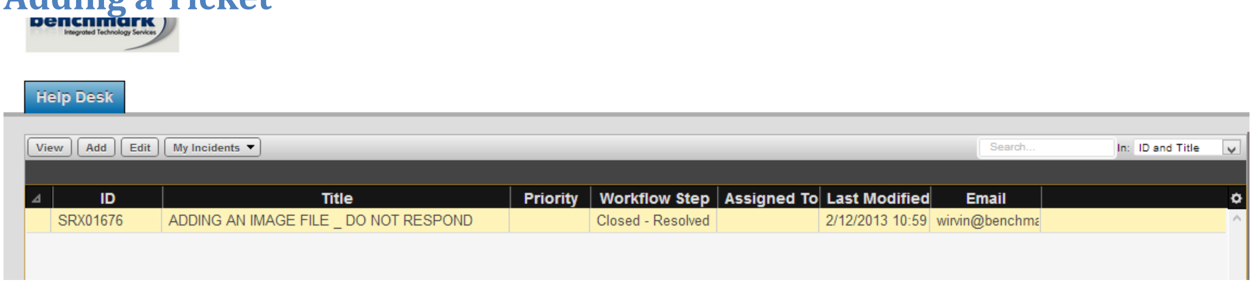
Account Creation

Click on “Create an Account” and enter the requested information and click the “Create Account” button.

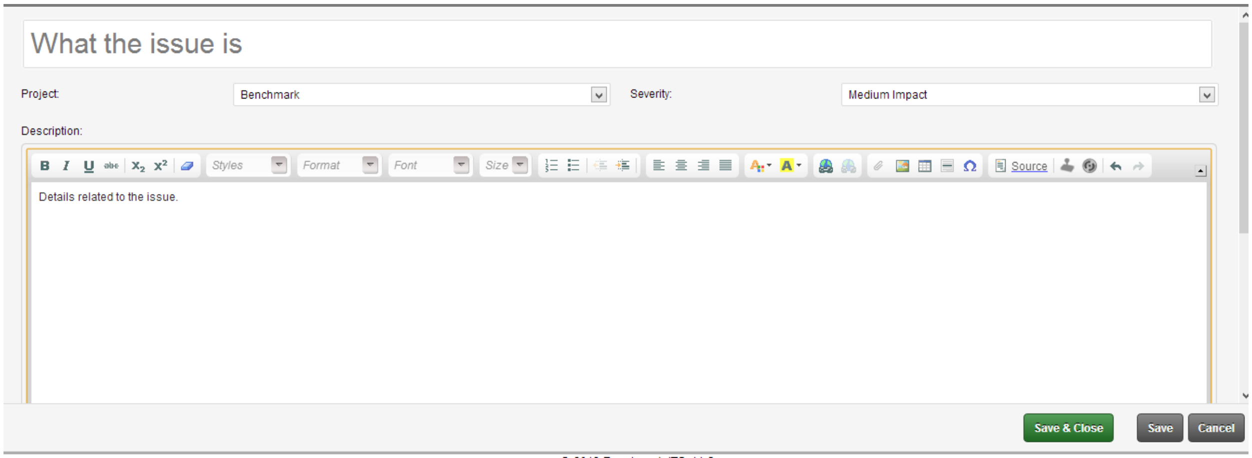


Once you have created an account and / or logged in you will see the ticketing dashboard.

Adding a Ticket



Here you will see a history of support tickets you have created and their status. To create a new ticket, click on “Add” at the top of the dashboard.



Fill in the information for the Title, Severity, and the description of the issue. When finished, click on "Save & Close".

NOTE: You may also send a ticket request to Benchmark by sending an email to support@benchmarkits.com.

Adding Attachments

The easiest way to add an attachment to a ticket is to create the ticket first. Once created; click on the ticket on the dashboard. Look to the Details section on the right. There is a header for Attachments.

To add the attachment, click on the "Add" button and navigate to the file you wish to attach. Once selected, click on "Ok" and the attachment has been added to the system.

Ticket Correspondence

The most common way that support will communicate with you in regards to an issue via email. When you receive an email from support related to a ticket, you will see something similar to "Re: Incident [#SRX01676] ". You will be asked to respond to the email and it will be added to your ticket.

COMPLETE INFORMATION

One of the easiest ways to assure that tickets are resolved as soon as possible is to include detailed information. Detailed not only as to the "issue" to be handled; but also in regards to the data that is causing the headache.

The following tips will help speed up our ability to research the issues and respond to your requests. As a rule, the more detailed information you provide the easier it will be for us to review your request.

1) **Please include your program name.** Even though you will establish your Program when setting up your account, include your Program Name somewhere in the body of the ticket. We can sometimes use your email address to determine the program, but when the email is generic (gmail, yahoo, etc.) or is a different name than how your program is represented in the system (you are with ClockTower and your email reads bill@MSAD411.edu, for example) it takes us additional steps to research the issue.
2) **Whenever possible, include the page URL.** If your request relates to a particular user, student, class or other specific page, it is most helpful to us if you include the direct link. If you tell us you can't enter a test for Susie Johnson, it is much quicker for us to go directly to the issue at hand if you include the URL to her test entry page.
   - When providing information about student(s) that has issues, the important information to relay is the ID Number located directly to the right of the Student's Name in their Snap Shot. The 2 easiest ways to attach this information is to:
     a) Highlight the student's name and ID Number and copy then paste into the ticket.
     b) While looking at the student's snap shot, copy the address from the address bar and paste into the ticket.
   - When providing information about a particular Class that you are having issues with; please include the Class ID Number for that particular class. The easiest way to attach this information is to:
     a) Navigate to the Add/Edit Class screen by clicking on the class from Class List.
     b) Copy the address from the address bar and paste into the ticket.
3) **Be as specific in your request as possible.** Even if you can't include the URL, please include information about the specific person, class or function in your ticket request. It's much easier for us to locate the issue if you say "When I attempt to enter a post-test for Elizabeth Reaser in the ParkCity Program, the dropdown list offers no available options" than it is for us to determine the issue when the ticket reads "I can't enter tests."
4) **Try not to enter duplicate tickets.** When you enter a ticket in the system, it creates a thread that allows Benchmark and/or your state to respond and you to reply. If you've identified a particular issue, it is not necessary to submit multiple tickets with the same issue even if the

issue you identified impacts multiple students/users. You can certainly add more information to the current ticket to assist us in resolving the issue, but it slows down our ability to respond in a timely fashion when there are multiple tickets that provide the same basic information.

5) **Be patient.** We do our best to answer every ticket the same day it is submitted and in the order in which it was received. Some tickets require additional research and/or internal discussion and it may take us some time to answer. Every ticket that comes through the system will receive an answer as quickly as we can determine the correct response.

   We may also require additional information from you in order to fully research the issue, and we will use the ticketing system to notify you if additional info is required.

   We also recognize that as you are now dealing with a unified system, sometimes a specific request for change may require approval from your state. There are some changes that cannot be made as we have an obligation to ensure that the system works for all users. This sometimes requires compromise.

   Be assured, however, that every ticket is reviewed by a member of the Benchmark or your state team and know that we take your requests seriously.

Reporting Functions

GENERATING FEDERAL REPORTS

Required Criteria

For federal tables that are student related, the student must meet four criteria in order to be included

- Student must have had an active NRS registration in the fiscal year for which the report is being run.
- Student must have at least 12 hours of attendance in the fiscal year for which the report is being run.
- Student must have at least one test assessment in the fiscal year for which the report is being run.
- Student Registration, Attendance and Assessment data must be approved.

If any of these 4 criteria are not met, the student will NOT appear on the tables.

Remember that Federal Tables 1, 2, 3, 4, 4B, 5, 5A, 6, 8, 9, 10 and 12 are generated at the AGGREGATE level for students. This means that the data contained on these Tables reflect a student's participation in the Adult Education SYSTEM. It is NOT specific to a particular Program.

Table 4 and Variants

In order to display a student's participation in a singular Program, Table 4.1 is available. This is NOT an actual Federal Table, it is a report designed by your system to reflect the data from Federal Table 4 but only display 1 Program's information.

Be sure to remember the distinction between COMPLETION and ADVANCE.

- COMPLETION – (Column D) Generated by an Assessment.
- ADVANCE – (Column E) Can ONLY occur after a Completion and then only after at least one (1) hour of Attendance has been entered AFTER that Assessment.

Table 5

In addition to the 4 basic requirements to be included on any Federal Table, in order to show on tables 5 & 5A; a student must have been separated from ALL Programs.

Table 6

Table 6 information is populated as follows:

- Disabled: Populated by the designation of Learning or Physically disabled in the Student Demographic Module
- Employed/Unemployed/Not In Labor Force: Populated by the Employment Status field in the Student Demographic Module
- On Public Assistance: Populated by the response to the "On Public Assistance" question in the Student Demographic Module
- Living In Rural Area: Populated by the response to the Rural/Urban selection in the Student Demographic Module

  Program Type
- For Family Literacy, Workplace Literacy, Homeless and Work-Based Project Learner rows, the state must offer the specific program and the student must have a Program Enrollment Type that corresponds.

  Institutional Programs
  Entries in the rows for In Correctional Facilities, In Community Corrections and In Other Institutional Settings are established by the Class Type in which a student was placed.

- Students placed in a Class designated by type as Correctional Facilities will generate an entry in the In Correctional Facilities row.
- Students placed in a Class designated by type as Community Corrections will generate an entry in the In Community Corrections row.
- Students placed in a Class designated by type as Other Institutional will generate an entry in the In Other Institutional Settings row.

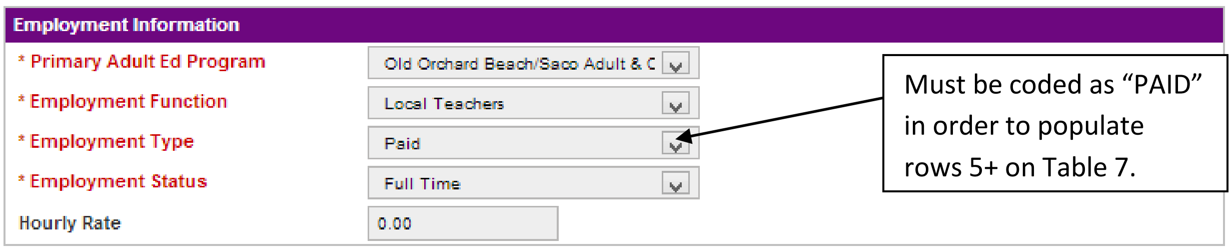
Secondary Status Measures

Entries in the rows for Secondary Status Measures are populated by entries in the Student Demographic Module.

Table 7

Table 7 includes Employee information during the given fiscal.

This information pulls from the Employment Function block of the User Administration module.



Each teacher may only be counted ONCE for Table 7. This is why it is imperative to search for users during set-up and not entering duplicates.

Table 8 (Optional)

In order for a student to be included on Federal Table 8 (Optional Table) the student must be enrolled in a Family Literacy Program Type and entered in classes which are designated as Family Literacy.

Table 9 (Optional)

In order for a student to be included on Federal Table 9 (Optional Table) the student must be enrolled in a WorkPlace Literacy Program Type and entered in classes which are designated as Workplace Literacy

Table 10

In order for a student to be included on Federal Table 10 (Outcomes for Adults in Correctional Education Programs) he/she must have been placed in a class with the type of Correctional Facilities, Community Corrections or Other Institutional Settings.

Table 12 (Optional)

In order for a student to be included on Federal Table 12 (Optional Table) the student must be enrolled in a Work-based Project Learner Program Type and entered in classes which are designated as Work-based Project Learner

Cohorts

Entered Employment

ASSIGNED – Not employed at time of entry and in the labor force (NOT listed as "not in labor force") who exit during the program year.

TRACKED – 1st Quarter after Separation

Retained Employment

ASSIGNED – 1) Employed at entry who exit during the program year
2) Who were not employed at time of entry and in the labor force BUT who are employed by the 1st quarter after exit quarter.

TRACKED – 3rd Quarter after Separation

Obtain Secondary Credential

ASSIGNED – 1) Who take all General Educational Development (GED) tests.
2) Enrolled in adult high school at the high Adult Secondary Education (ASE) level.
3) Enrolled in the assessment phase of the External Diploma Program (EDP).
4) For any of the above, must exit during the program year.

TRACKED – Through December 31st of the calendar year that ends the fiscal of exit.

Enter Post-Secondary Education

ASSIGNED – 1) Who have earned a secondary credential while enrolled.
2) Hold a secondary credential at entry.
3) Enrolled in a class specifically designed for transitioning to community college
4) For any of the above, must exit during the program year.

TRACKED – Through the 2nd Program year after the year of exit.

Calculating EFL

Assessment Score (both pre-tests and post-test) are used to calculate the EFL for the student.

Regardless of the number of tests in the battery (Traditional – 3, Nontraditional – 2, Nontraditional – 1); the EFL will be the LOWEST of any entered score in the test battery.

The entry of Post-tests will generate a recalculation of the EFL, the Action Taken and Improvement Requirements for the student.

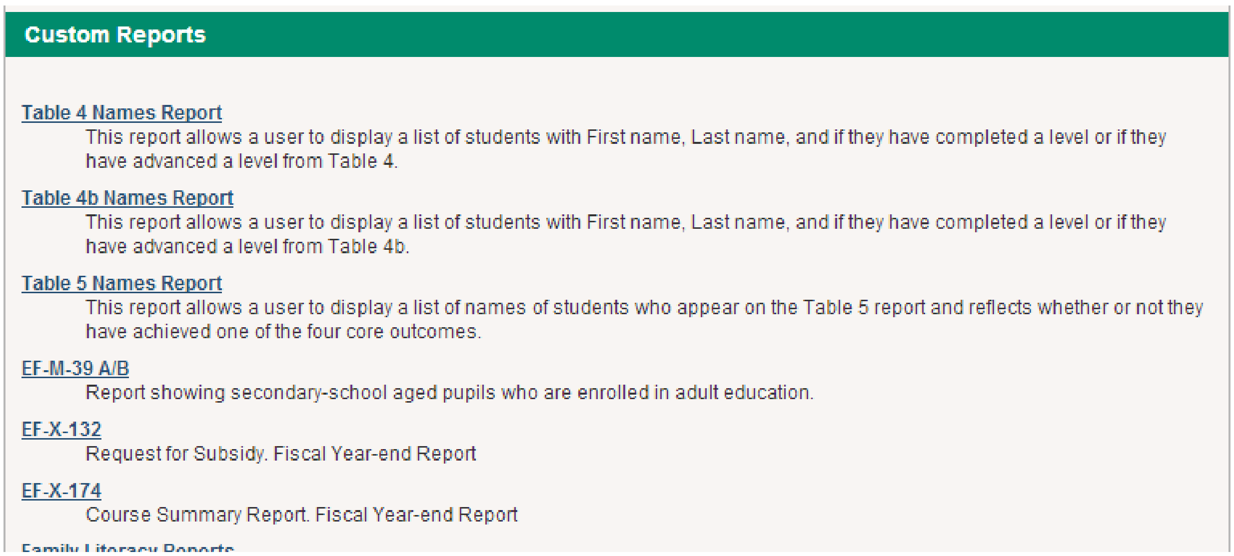
CUSTOM REPORTS

The system provides a number of standard custom reports that can be generated at any time.

All custom reports offer a variety of filtering options for generation and reflect the most current approved data at the time of generation.

The list of custom reports is based on state requirements and may include a variety of student, class and program reports.

Reports can be exported to a variety of formats including Excel and PDF.



A very useful Custom report is the NRS Registration Report. This report will display vital Federal Table dependant information and provide an at-a-glance view of why a student may not be appearing on one of the Federal Tables.

Filtering Tips

General

All of the Custom Reports are filterable to customize the information displayed. In addition, all reports are exportable to various formats to allow for more in-depth data mining. (See Generating Excel Reports)

The fields available for filtering vary depending on the information displayed on the various reports. For the Names reports for Tables 4, 4b & 5; there are 4 fields available on all the reports in addition to the "Ignore Minimum Attendance Rule" function. They are:

1. Report Dates From – To
2. Adult Education Program
3. Classes
4. State

Table 4 Names

The Table 4 Names Report may also be filtered by the EFL of the Student.

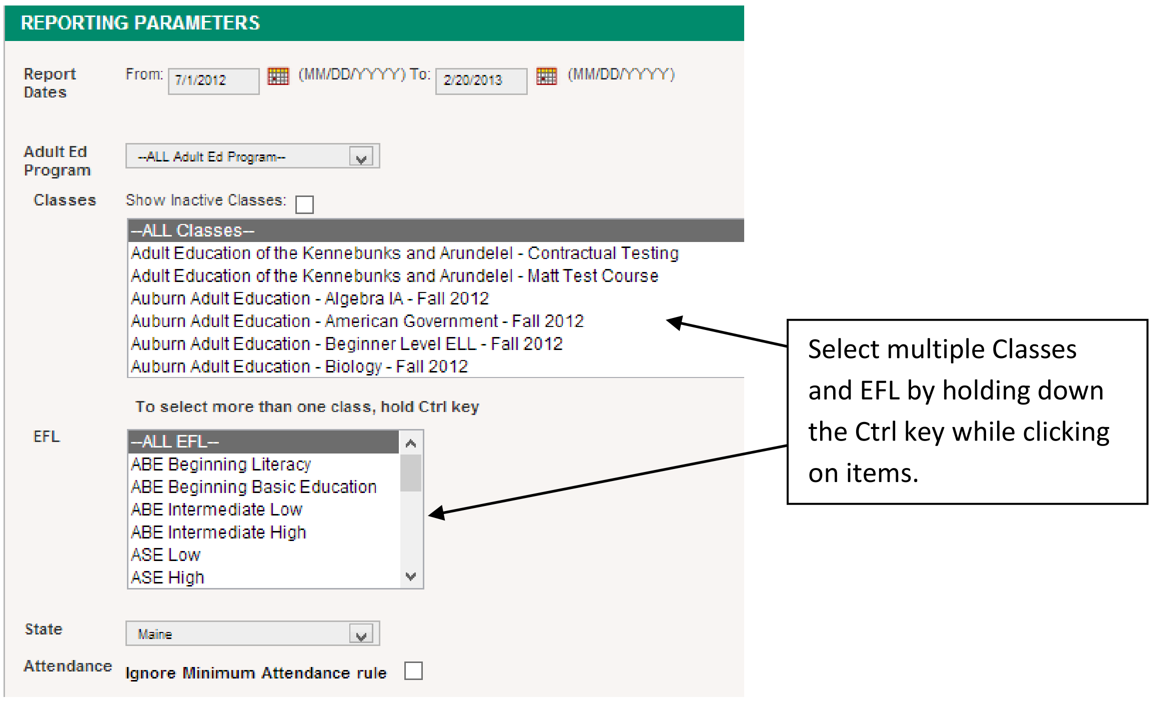


Table 4b Names

The Table 4b Names Report is filterable by the items previously described.

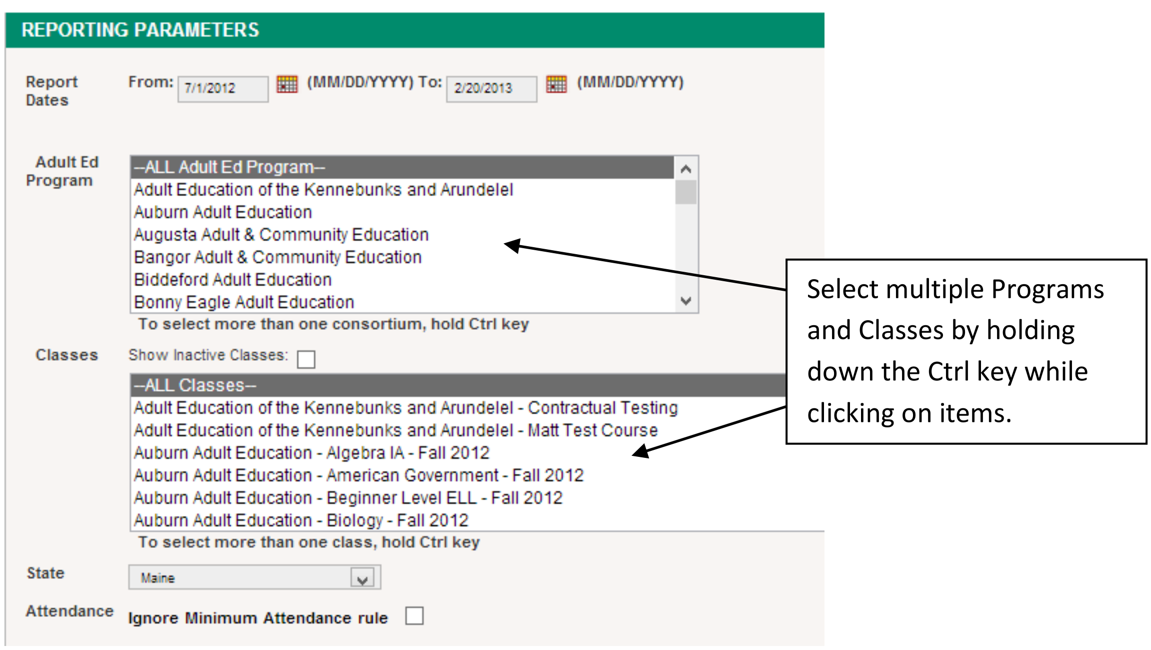
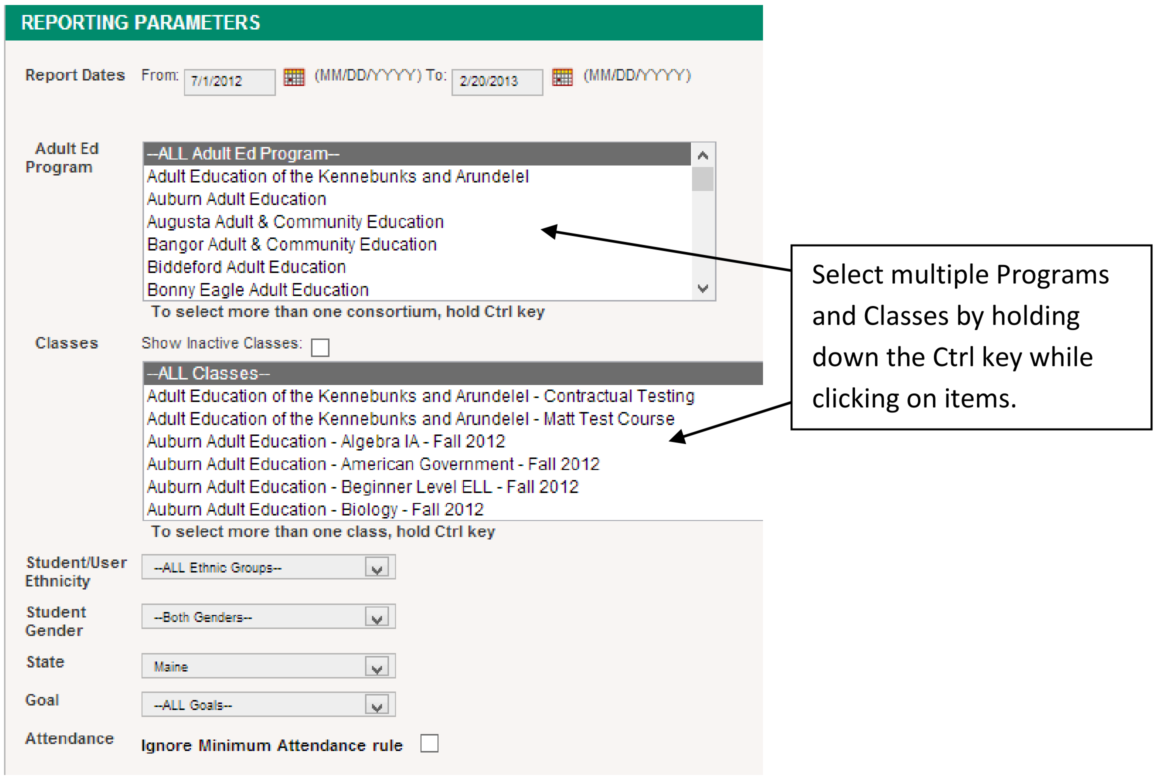


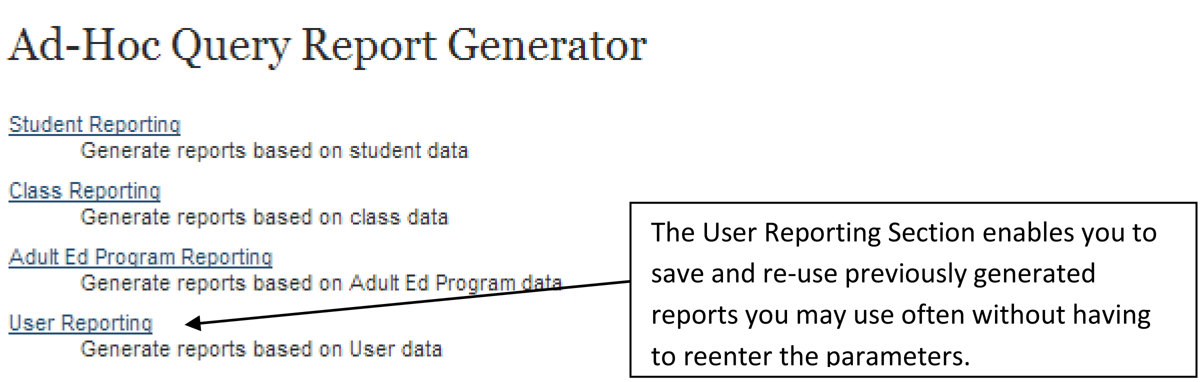
Table 5 Names

The Table 5 Names Report may also be filtered by Ethnicity, Gender, and Goal.

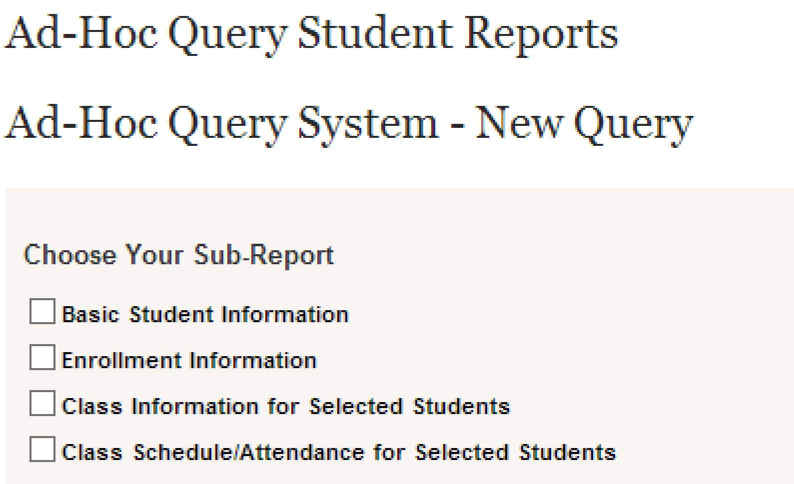


AD-HOC REPORTING

The Ad-Hoc Reporting Generator allows you to create custom reports with the data elements and criteria you select based on 4 general topics. These reports display aggregate information from throughout the system.

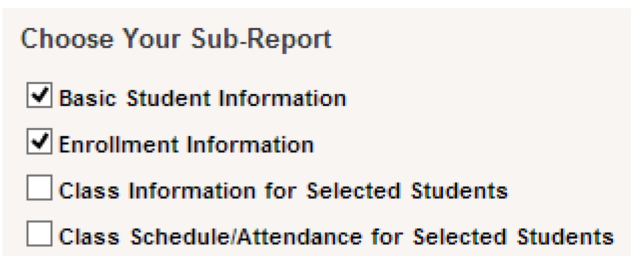


Any of the Report Sections will take you to the Sub-Report Page. This is where you enter the parameters you desire for the Ad-Hoc Report.



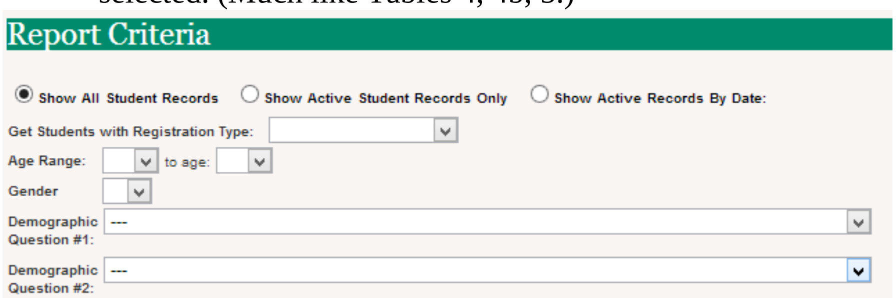
Here we have selected Student Reports and now you will check the type of information you wish to include. As you make your selection(s), the system will refresh to display the specific data elements available in that sub-report.

Below, we have selected “Basic Student Information” and “Enrollment Information”.

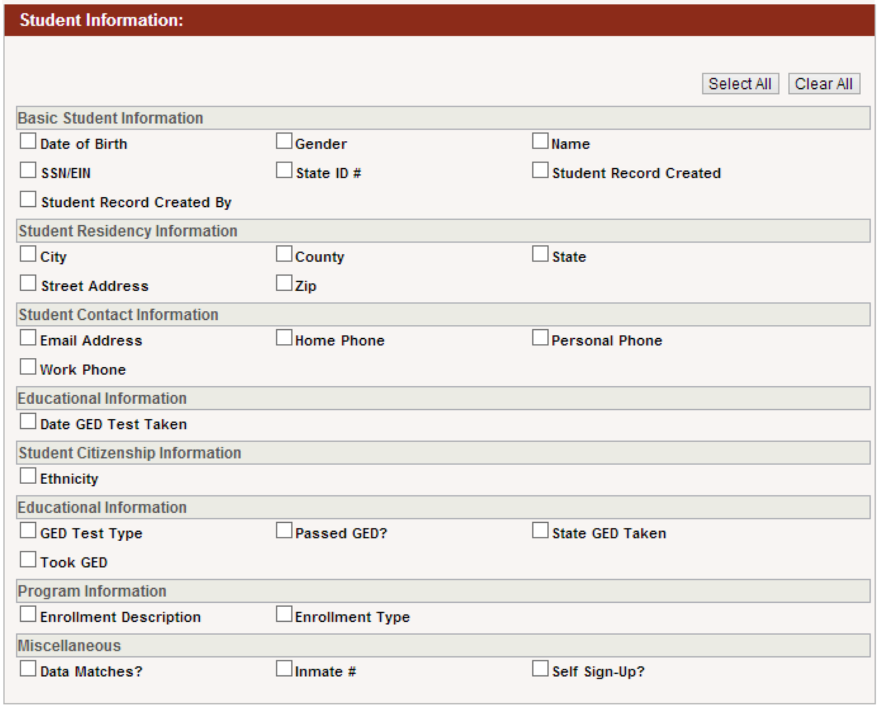


I now have 3 sections on my screen:

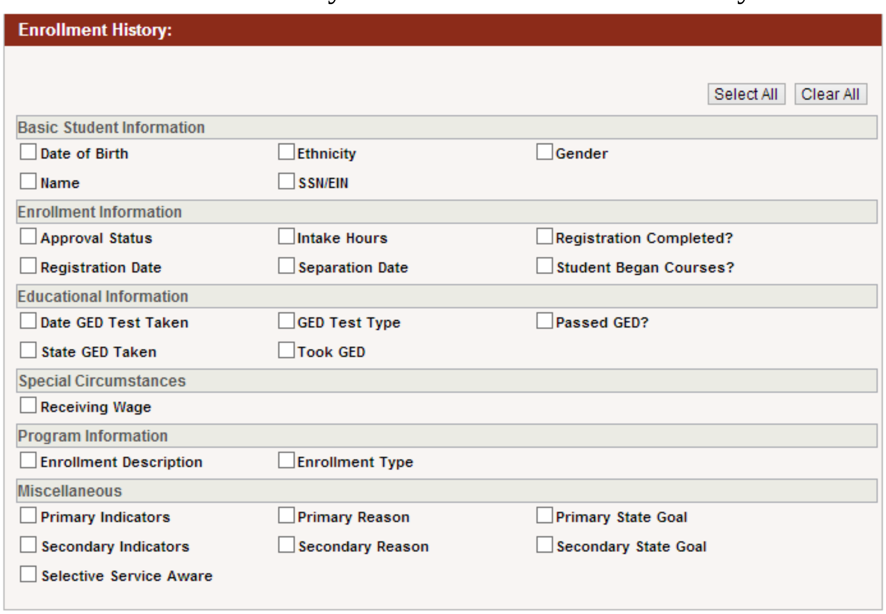
1. Report Criteria – This will limit the amount of information displayed. (It is a filter.) This will display for all creations but the information available depends on the sub-report selected. (Much like Tables 4, 4b, 5.)



2. Student Information – These are the data elements you wish to display.

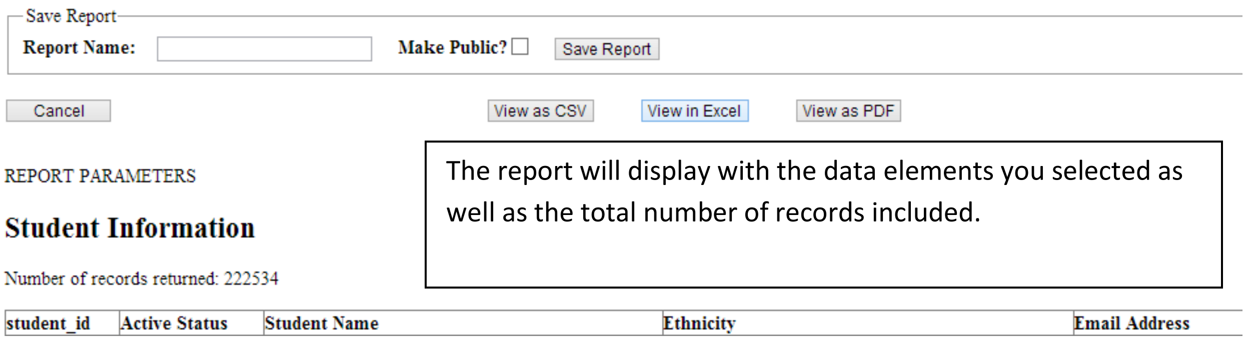


3. Enrollment History – These are the data elements you wish to display.



Once you make your selections, click on "Preview". Remember, these are *aggregate* reports.

Once displayed, you can save your report for future use. Simply give your report a name, if you want other users to be able to use your template click the “Make Public?” checkbox, click “Save Report”.



The report will display with the data elements you selected as well as the total number of records included.

GENERATING EXCEL REPORTS

Excel is a powerful tool that used in conjunction with the system will enable you to pull an enormous amount of specific information.

In the example below, we want to send a satisfaction survey to students who attended classes for the current term. We have created an address label report for the students in our Program.

Student Name and Address Report

First Name	Last Name	Street Address	City	State	Zip
Misti	Blair	9 Wards Way	Belfast	ME	04915
Kimberly	Davis	44 Patterson Hill Rd	Belfast	ME	04915
Kelli	Killam	28 Edgecomb Road	Belfast	ME	04915
Daniel	Kilpatrick	103 Nickles Road	Searsport	ME	04974
Devon	Richards	142 Kendall Corner Road	Waldo	ME	04915
Dustin	Sawyer	174 Pout Town Rd.	Stockton Springs	ME	04981
Meagan	Small	71 Achorn Road	Belfast	ME	04915
		1			

Number of records returned: 7

To create the export, simply click on the “Export (Excel)” button to begin the process.

Once exported, you can format and filter for use with any mail merge process you may already have.

Another report that you may find Excel beneficial is the NRS Registration Report. By exporting to Excel you can use the filtering and sorting functionality to display only the students missing particular data elements.

End of Semester / End of Year Processes

END OF SEMESTER

ADVANSYS is designed to help make the process of ending a semester as painless as possible. The system is also designed so that classes (and the students who are placed in them) can span semesters and even span fiscal years.

The following steps will help you make sure the classes for a semester are properly closed and the students in those classes transitioned to where they each need to be.

Copy Classes and Create New Classes

Any class that will be recreated in the new semester can be copied and slotted for the new semester. You should make all appropriate changes to class term, fees, hours, etc. If any new classes should be created for the new semester, create them and enter all required fields.

Using the copy function will allow you to create classes that will happen in the near or far future, such as for ***next*** fall or ***next*** summer. You'll make your required edits to reflect the dates that the class will happen on. Be aware that not making any changes to the new copied class other than your dates which ***are*** required will make it appear as though you have multiples of the same class with the exception of your course ID number. For historical record-keeping purposes we suggest that no changes be made to classes that are currently in session after students have been exited as any changes to the class will be reflected on a student's record. Use the copy function instead.

Classes and all the information associated with that class (including location, times, teachers, etc.) can be copied from one fiscal year or one term to the next by using the copy class button at the bottom of the class creation page.

Copying classes allows the recreation of the entire class; therefore the following information (at minimum) should be reviewed and/or edited:

- Class Start Date
- Class End Date
- Class Type
- Class Name
- Class Semester
- Class Size
- Class Year

Review Student Attendance Records in Current Classes

Before closing classes for the current semester, review the attendance entries and make sure all attendance has been entered and approved.

The attendance entry page is an excellent place to manage student transcripts and grades for those students who must exit the class when it is closed.

One suggestion when entering the last day of attendance for each student in the class, use the remove from class feature and add transcripts and grades to all students who are exiting the class.

Transfer Students If Desired

If students are going from one section of a class to another, for instance, ADVANSYS does allow for those students to be transferred from the old class to the new one. Upon transfer all new fees that should be applied will be applied just as if the student had been manually enrolled.

*NOTE: The transfer function does not provide a method to enter grades/transcripts for students who exit (**are separated**) one class and are moved to another. Grades and transcripts must be entered on an individual basis for each transferred student.*

Closing Classes

*NOTE: Closing a class does **not** eliminate the historical record of the class or the placement history of the student. Those records are maintained. BenchmarkITS is aware of the need to have ready access to these records and is currently in the process of implementing new functionality that will make it easier for you to obtain and manage these records. **Both** the student and class will show up on appropriate reports.*

When a class is closed, all students must be removed from the class. ADVANSYS provides a method where all enrolled students can be automatically exited at one time as the class is closed.

Upon closure, ADVANSYS will generate a list of all students who were removed (***separated***) from the class and will provide links from that list to the transcript and grades entry module for each student. The links will each open new window so that users will not be required to close and re-open the list of exited students each time.

Once closed, no further entries can be made on the classes in the prior semester unless the class is reopened for editing. For historical record-keeping purposes we suggest that no changes be made to classes once they have been closed as those changes will reflect upon the student’s records.

Classes that do not have any students enrolled can be marked as “Is Closed”

Open class by clicking on “Class List” on the navigational bar

Click on the Class Name

Place a check in the “Is Closed” box at the top right of the class title

Scroll to the bottom and click Save Class. This makes the class inactive.

NOTE: Classes that have currently enrolled students cannot be closed. All students must be exited from the class at the time of closing.

Inactive Class List

To access the inactive class list

- Click on "Class List"
- Top right of the classes listed is a drop down
- Select Only Inactive Classes

To reactivate the class

- Click on the class title and remove the check mark from "Is Closed" box
- Click Save Class at the bottom of the class page.

NEW FEATURE: *The system has the ability to remove students from classes in bulk at the time a class is closed. When the Close Class button is selected, an exit date will be applied and all students enrolled in the class will be removed as of that date.*

Place Students in New Classes

At any point during the transition process students can be placed in the newly created classes for the next semester.

Exiting Students

NRS guidelines suggest that any student who has not received attendance for 90 days "and is not scheduled to receive further instruction" should be Separated from the Program.

Students may be separated for a variety of reasons other than non-attendance. Upon separation a primary reason will be entered.

Separating students from the program should occur when the student is no longer enrolled in that particular program of instruction.

Students may be separated individually from each different type of enrollment, while remaining in another enrollment type that applies.

Separation from NRS Registration Enrollments is used to determine inclusion on Table 5.

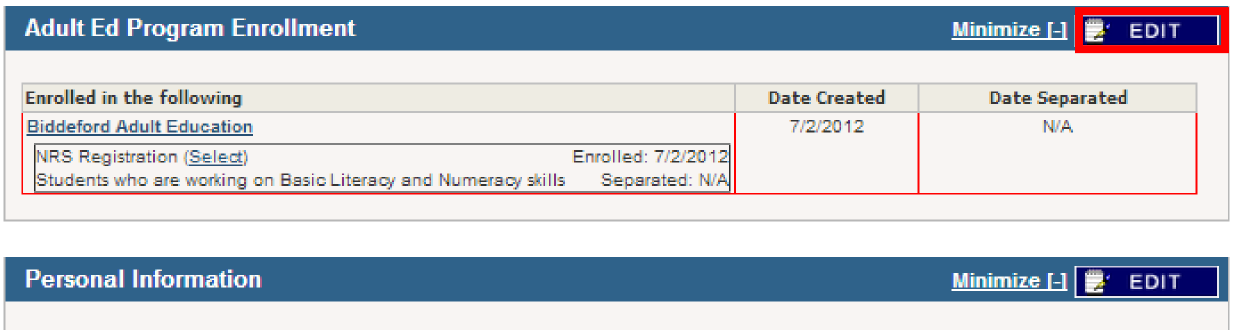
NOTE: Prior to Separating a student it is recommended that approvals for all student data have been entered. Unapproved data will not be included in the student record.

It is further recommended that the student be removed from all Class Rolls prior to separation.

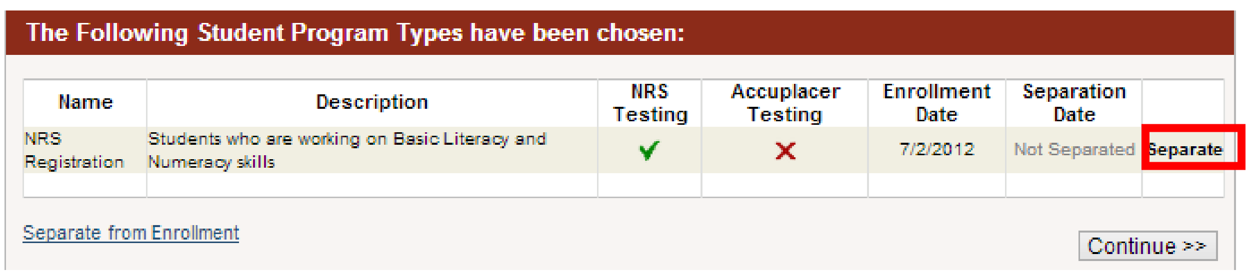
Separating a student from the NRS Registration will not cause the loss of any data.

To Separate a Student:

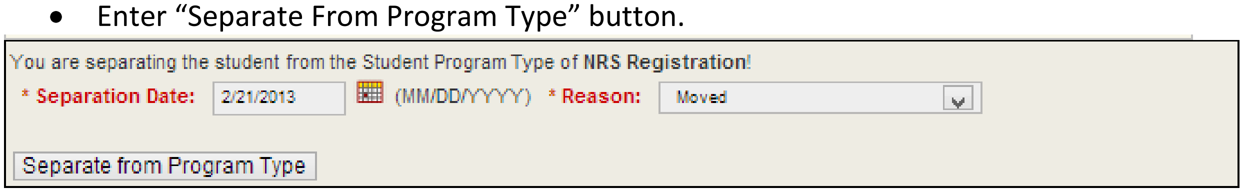
- Locate the student by searching or browsing for his or her record in the system.
- Click the EDIT button in the Adult Education Enrollment Block of the student profile.



- Scroll to the list of Student Enrollment Types and follow the "Separate" Link in the Enrollment Type Block.



- Select a Separation Date
    - Separation Date MUST be after Enrollment Date
    - Separation Date MUST be after the last date of data entry (Attendance or Assessment)
    - Separation Date CANNOT be a date in the future.
- Select a Separation Reason from the Dropdown List.
- Enter "Separate From Program Type" button.



Follow the same process for each Enrollment Type to completely remove student from a program.

END OF YEAR

It is NOT necessary to separate all students at the end of a fiscal year!

- **Do** separate those who should appear on Table 5. Active students do not appear on Table 5.
- At the end of the fiscal year the system will generate a PENDING SEPARATION for all students.
- If the student is re-activated the pending separation will be removed.
- **Reactivation is triggered by the following**
    - Entry of attendance in the new fiscal year
    - Entry of assessment scores in the new fiscal year
    - Revisions to student profile/enrollment/class placement
- When a student is made active in a new fiscal year, the following data fields must be updated:
    - Employment Status (this persists for the student for the duration of the fiscal)
    - Last Grade Attended (US/Non-US, this persists for the student for the duration of the fiscal)
    - Agreement to Data Match and Release Records
- When a student is reactivated, rules governing rollover students will be followed:
    - Ending EFL of the previous fiscal is established as Entering EFL of the new fiscal.
    - Assessments taken on May 15 or after will be considered as tests in the new fiscal year
    - Attendance (for federal table purposes) resets to zero. In order to appear on federal tables the student must accumulate 12 hours in the new fiscal.
- **NOTE: Reactivation MUST occur before the cut-off date determined by the state!**
- If a student is NOT reactivated by attendance, assessment or revision, all enrollments, class placements and registrations will be terminated and the student will be assigned a separation date of June 30 with a separation reason of "No Attendance In 90 Days"

EFX-174 Report

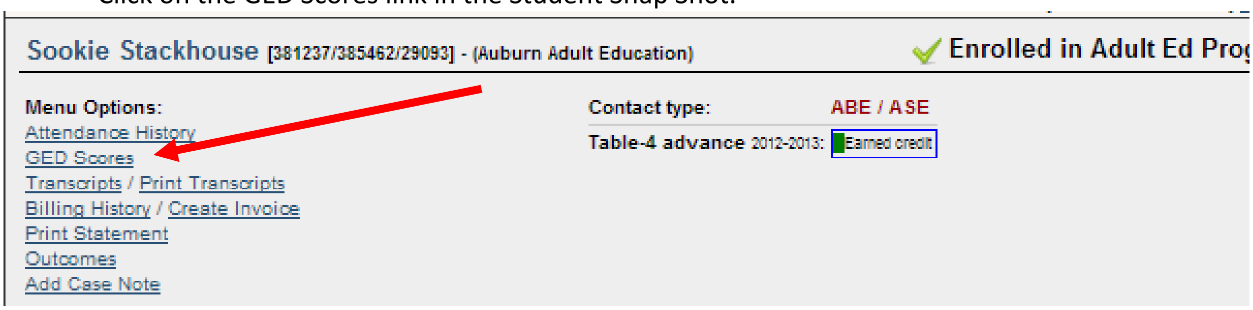
Some programs have had problems with the EFX 174. If you are missing classes in that report, it is most likely because the end date is 1753. This was the default year for classes that were rolled over. Benchmark has supplied us with a list of classes by program to help correct the problem. Megan will be sending emails out shortly to each program with their list attached. Upon receipt of the list, you will be able to make those changes for your EFX as well. You may also want to consider removing classes (if inactive) that have no attendance and/or students in them to remove some of the clutter.

GED Scores and Outcome Entry

GED SCORE ENTRY

To enter GED Score(s) for a Student:

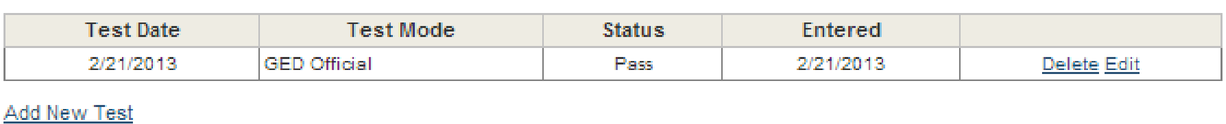
- Locate the student by searching or browsing for his or her record in the system.
- Click on the GED Scores link in the Student Snap Shot.



- Click the “Add New Test” link at the bottom of the page.

- Select the Test Type from the Drop Down
- Set the Test Date
- Select Pass or Fail
- Click on “Save Test”

- When the screen refreshes you will see the test listed on the screen.



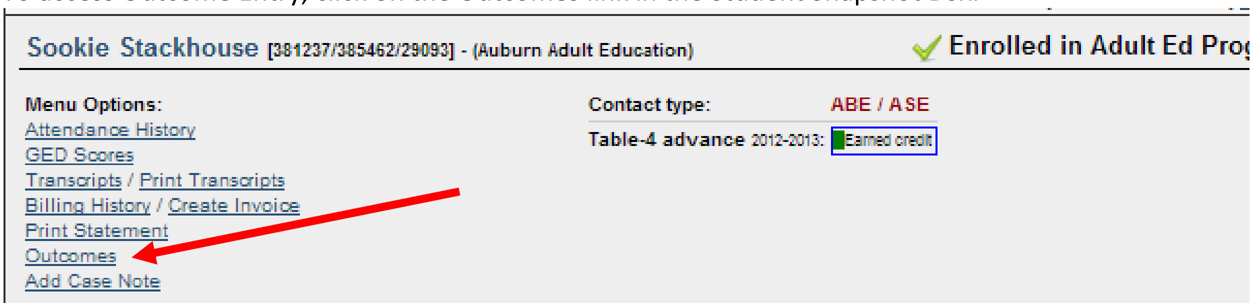
Test Date	Test Mode	Status	Entered	
2/21/2013	GED Official	Pass	2/21/2013	Delete Edit

Add New Test

OUTCOME ENTRY

Outcome achievements can be entered on an individual student basis, provided that the student in question meets the requirements for inclusion on the appropriate Federal Tables in the case of Employment Outcomes.

To access Outcome Entry, click on the Outcomes link in the Student Snapshot Box.



For Employment Outcomes, data validation routines require that the student for which data is being entered be separated from the program, have a minimum of 12 hours of attendance entered and approved. Data validation also requires that the achievement be entered only during the appropriate window of time for follow-up as mandated by the National Reporting Service.

- For Entered Employment the reporting window is one quarter after separation.
- NOTE: An outcome of Entered Employment will automatically generate an automatic cohort outcome measure of Retain Employment, for which follow up must take place in the appropriate reporting window.
- For Retained Employment the reporting window is the third quarter after separation
- GED achievement may be entered at any time during a student's enrollment and until the last day of the calendar year that ends the fiscal in which the student separated.
- Enter Postsecondary Education or Training achievement may be entered for two (fiscal) years from the date of separation.
- NOTE: For a student to appear on Federal Table 5 and the associated Tables, he/she must be separated from ALL programs.

Data validation requires that the data entry specialist indicate that appropriate documentation exists for the outcome achievement being entered.

Data entered for individual students must be approved by a program administrator. Once approved, the data entered will be used to populate the appropriate Federal Tables.

Attendance Entry

APPROVALS

Before data is committed to the system, it must be approved. Approval permissions are typically limited to the Program Administrator's role. The rationale is that program administrators are ultimately responsible for the data; therefore approval of data into the system should rest with users at that level or higher.

Approvals are accessed via the Pending Approvals Link in the Program Management section of the left hand navigation menu.

Notifications regarding Pending Approvals are also located on the landing (home) page for users who have approval permissions.

The system currently requires the following data to be approved:

- Registrations (NRS)
- Profile Changes
- Test Scores
- Class Hours
- Outcomes (Typically State Level Only)
- Accuplacer Tests

NOTE: AFTER SUBMISSION OF APPROVAL, STUDENT CONTACT TYPE, ASSESSMENT ENTRIES, ATTENDANCE DATA, EMPLOYMENT STATUS AND LAST GRADE COMPLETED STATUSES CAN NOT BE EDITIED. Be sure all information is accurate BEFORE approving it.

Declined Entries are removed from the system and must be re-entered.

NRS HOURS V. NON-NRS HOURS

The system will track all attendance hours entered in the system and differentiate them into 2 categories:

- NRS Hours
- Non-NRS Hours

Although the requirements to be either NRS or Non-NRS are fairly straightforward; it does tend to cause confusion from time to time.

The cross-walk below lays out how to designate attendance hours as NRS or Non-NRS.

Classes are not assigned to registrations within programs. The class is assigned to the STUDENT within the registration not the registration. A student can be registered in more than one type but all classes within that student registration are assigned to the student.

It's the combination of registration type and class type that determines the student's eligibility for federal reporting and how hours entry will be reflected.

STUDENT Registration TYPE	**CLASS TYPE**	**HOURS WILL BE COUNTED AS**	**Assessment entry allowed (currently)**
NRS	NRS	NRS	Yes
Non-NRS	NRS	Non-NRS	No
NRS	Non-NRS	Non-NRS	Yes
NRS + Non-NRS	NRS	NRS	Yes
NRS + Non-NRS	Non-NRS	Non-NRS	Yes

Testing Routines and Justification

Once a pre and posttest battery has been completed, the administrator will have two options regardless of whether the student has finished the level, remained in the same level or regressed.

a. The administrator can choose to start a new battery and begin the process over, choosing the same or a different battery and selecting the number of tests to enter.
b. The administrator can elect to "continue in the same battery". Continue in the same battery would allow the administrator to keep "building" on the previous battery using the same guidelines as above.
    1. EFL calculations will be based on original number of tests and consider the most recent scores.
    2. Assessment scores can be entered in any number
    3. Tests will alternate on an individual basis
    4. Assessment history will be included on the test entry page for convenience
    5. Improvement requirements will be displayed on a "per-entry" basis. They will show the overall functioning level, each test taken in the current battery series, the functioning level for each test and the score required on each to advance to the next level.

The entry of assessment scores, the calculation of both entering and subsequent EFL and the determination of action taken are each used to automatically populate the corresponding fields in the appropriate Federal Tables.

NOTE: For Table 4 purposes, Advance and Completion are calculated on a per-test basis, regardless of overall EFL.

A student's overall EFL may regress or remain the same, but so long as one individual test is improved at a sufficient scale to improve from one level to the next, credit for a completion is given for Table 4.

CREATING A NEW BATTERY

After a pre-test and post-test routine has been completed, the option to create a new battery or change justification is available.

In the case of assessments that were imported from previous data systems, the Change Battery option will allow the test progression to continue.

To Change the Battery or Justification, you may have to navigate to the EDIT function by Assessment Test Reporting in the Student Profile Page.

On the assessment entry screen there will be a message related to the current assessment status that is similar to the example below:

Contact Type: **ABE / ASE**
Current Status: **Post-tested**
(entering tests here will continue in the same battery/justification
or you can start a new battery/switch justification.)
Current Battery: **MAEMIS - Imported Tests**
Current Justification: **Traditional**

Creating a New Battery or Changing Justification will allow the entry of new tests and continue the student progression.

DIFFERENCE BETWEEN COMPLETION AND ADVANCE

The system differentiates between Completion of an EFL and Advance to the next EFL by attendance. The addition of one hour of instruction on or after the date of the assessment that triggered the completion will trigger the advance.

- Tests trigger Completion.
- Attendance triggers Advance.

Logical progression processing requires that an advance follow a completion. Before a student can have additional tests added to his/her record the advance must be triggered by the entry of an attendance hour.

The addition of an hour on or after the date of the test is critical particularly at the end of a fiscal year.

According to the rules for Table 4, the column for Advanced *MUST* be a subset of the column for completed. Therefore if a student completes by testing at the end of the fiscal year, he/she must also advance by attendance in that fiscal or his assessment entry record will be locked.

Logical progression means that a student cannot have an advance in one fiscal without also having a completion in the same.

This rule applies regardless of the May 15 exception.

Example: If John Smith completes Level 3 by achieving the requisite test score on June 20, he must have an hour of attendance entered between June 20 and June 30 or the system will not permit additional test entries.

NOTE: By NRS rule there is no Advance from the highest level of ASE or ESL (Level 6).

UNAPPROVING/DELETING TESTS

Once tests have been entered and approved those entries cannot be altered at the program level.

State administrators have the ability to unapprove tests upon request. A ticket listing the student's name, identifying information and a list of the tests which should be unapproved/deleted should be submitted through the online ticketing system.

NOTE: Bear in mind that the system automatically generates EFL, progression and improvement requirements. For that reason test entries must be edited in sequence. For example if a student took assessments on July 8, September 15 and December 3 edits/adjustments cannot be made to the July entries without first removing the September and December entries.