ADVANSYS

ADULT EDUCATION MANAGEMENT SYSTEM

Training Manual

Level 2

REVISED:

August 26, 2013

benchmark

Integrated Technology Services

Contents

Welcome!

On behalf of our trainers Cari Nichols, Melissa Milam, Alisha Brantley, Wes Irvin and our lead developer Tim Turner and the rest of the Benchmark team, I would like to express our appreciation for giving us the opportunity to work with your Adult Education programs.

We are pleased to serve you and look forward to continuing to work with you in the future.

We are proud of the ADVANSYS Adult Education Management System application and confident it will more than meet your needs.

BenchmarkITS implemented its first web-based Adult Education Management System in 2003. Since that time our system has undergone a number of revisions, each designed to improve features, functions and accountability. We are never finished working to make our system, and hopefully your work lives, better.

As the system grows we rely on your feedback to help us guide and shape each new version of the system. We welcome your suggestions for improvement.

Sincerely,

Kevin Strickland, President
Benchmark Integrated Technology
www.benchmarkits.com
888-344-5950

INTRODUCTION

This training manual touches on some of the most common Program Administration tasks in the ADVANSYS system. Due to the fact that the system is ever-changing as new modules, enhancements, revisions and features are released, no written manual, including this one, can be considered an authoritative document on all features and functionality of the system. BenchmarkITS, which developed and implemented the system, provides multiple version releases per year and also updates the system to guarantee compliance with the mandates of the National Reporting Service.

Online help is available for most components of the system and is more likely to be current with the latest version release. This manual is intended to be a guide to assist with your initial understanding of the system and its function.

WHY IS A DATA SYSTEM REQUIRED?

Adult Education and Family Literacy Act of 1998

WIA-Workforce Investment Act

Signed into Law on August 7, 1998, the Workforce Investment Act of 1998 (WIA--P.L. 105-220) reforms Federal employment, adult education, and vocational rehabilitation programs to create an integrated, "one-stop" system of workforce investment and education activities for adults and youth. Entities that carry out activities assisted under the Adult Education and Family Literacy Act are mandatory partners in this one-stop delivery system (US Department of Education)
(http://www.ed.gov/policy/adulted/leg/legis.html)

HISTORY OF THE NRS

The NRS (National Reporting System)

NRS was born in the 1990s, a decade known for its emphasis on accountability of Federal programs, when all publicly funded programs and agencies faced increasing pressures to demonstrate that they had met their legislative goals and had an impact on their client populations. The requirement to demonstrate program impact was mandated in 1993 through the Government Performance and Review Act (GPRA). GPRA required all Federal agencies to develop strategic plans to ensure that services were delivered efficiently and in a manner that best suited client needs and to develop indicators of performance to demonstrate their agency's impact.

In 1995, the U.S. Congress considered eliminating adult education as a separate delivery system by integrating the program into a general system of workforce development. Strong and convincing data on the impact of adult education at the State and Federal levels were demanded to demonstrate its importance as a separate education program. In response to these demands, the State directors of adult education asked the Division of Adult Education and Literacy (DAEL) to work toward developing a national system for collecting information on adult education student outcomes.

To address these demands, DAEL devoted its March 1996 national meeting of State directors of adult education to developing a framework for program accountability. This framework specified the purposes of the adult education program and the essential characteristics of an accountability system and identified seven categories of outcome measures. At the March 1997 DAEL national meeting, a broad group of adult education stakeholders validated the framework, identified outcome measures for a new national reporting system, and discussed possible methodologies for the system. Based on these decisions, a project to design and develop the reporting system began in October 1997. The proposed voluntary nature of the NRS changed in August 1998 with the passage of WIA, which required an accountability system. The NRS mandate was then expanded to establish the measures and methods to conform to WIA requirements.

DAEL released a draft of the NRS Implementation Guidelines in mid-1999 and another draft in June 2000, reflecting changes from State comments and early State experiences in implementing the requirements. The NRS formally went into effect on July 1, 2000, and DAEL issued a final guidelines document in March 2001

Guideline revisions were released in 2006 and new guidelines go into effect for 2012. Primary changes to the 2012 guidelines are to the assignment and tracking of student goals and to the information retained on employees and volunteers.

BENCHMARK ITS HISTORY

Benchmark Integrated Technology Solutions was formed in 2003 to meet a growing need to provide web-based solutions and consulting services primarily for clients in the field of education and adult education including both Adult Education Administrative Software (ADVANSYS) and GED Scoring and Reporting. Since its inception, Benchmark has implemented and maintains Adult Education Management Systems and/or GED Scoring Services in multiple states.

"The system is never completely finished," Benchmark ITS president Kevin Strickland says. "We are always making improvements, upgrading new versions, and making adjustments. Some of those are enhancements based on feedback from system users. We also adapt as NRS rules are changed. You can expect to see a minimum of two new major version releases a year on average."

ADVANSYS is a web-based, student-centered data management system. The system provides data management functions that include creating student profiles, teacher profiles, and classes, the entry of test scores, attendance hours, and student goals and the ability to generate reports quickly and accurately.

Most reports can be printed from the screen or exported into a Word document, an Excel spreadsheet, or an Adobe pdf file.

Organizational Structure

USER ROLES:

STATE LEVEL

State Level permission allows state level personnel to access statewide data and reports for all Programs and all students. Due to the nature of this type of permission, this role will be limited to a handful of users within the system.

USER ROLES

Any number of user roles can be created with a variety of varying permission levels. Role creation is performed at the state level and the system can build new roles that stem from the two basic levels of access. The two basic levels of access are:

- *Program Admin*- this is the level for directors and approved data entry personnel
- *Teacher*- allows teachers to view, add, and edit students enrolled in the class assigned to them.

Program Admin Role typically can:

- Input data
- Set up new classes, edit existing classes, close unused classes
- Add and disable users
- Set roles for users
- See all data for the Program
- Run reports for the Program
- Generate NRS tables for the Program
- ***Approve* data**

This role must enter users in the program, assign roles and assign a password.

Teacher: This role is assigned by the director. Teachers will log in using their login and a password assigned by the director, once logged in the user will be required to change the password by the system. *Role permissions are established by the State and may vary.*

A TEACHER Role typically **can**:

- Enter students
- Edit students
- Enter test scores
- Add student outcomes
- Separate students
- View reports, attendance and testing alerts
- Generate NRS tables

A TEACHER Role typically **cannot**:

- add new users
- add classes
- change user roles
- view any information except their assigned classes

As an example of a role that stems from the Teacher level of access, the state could create a View Only Teacher which would have fewer access rights than a Teacher.

Getting Started
ADVANSYS Website

Log in to the system is determined by state protocols. Your supervisor should provide you with login information and a temporary password.

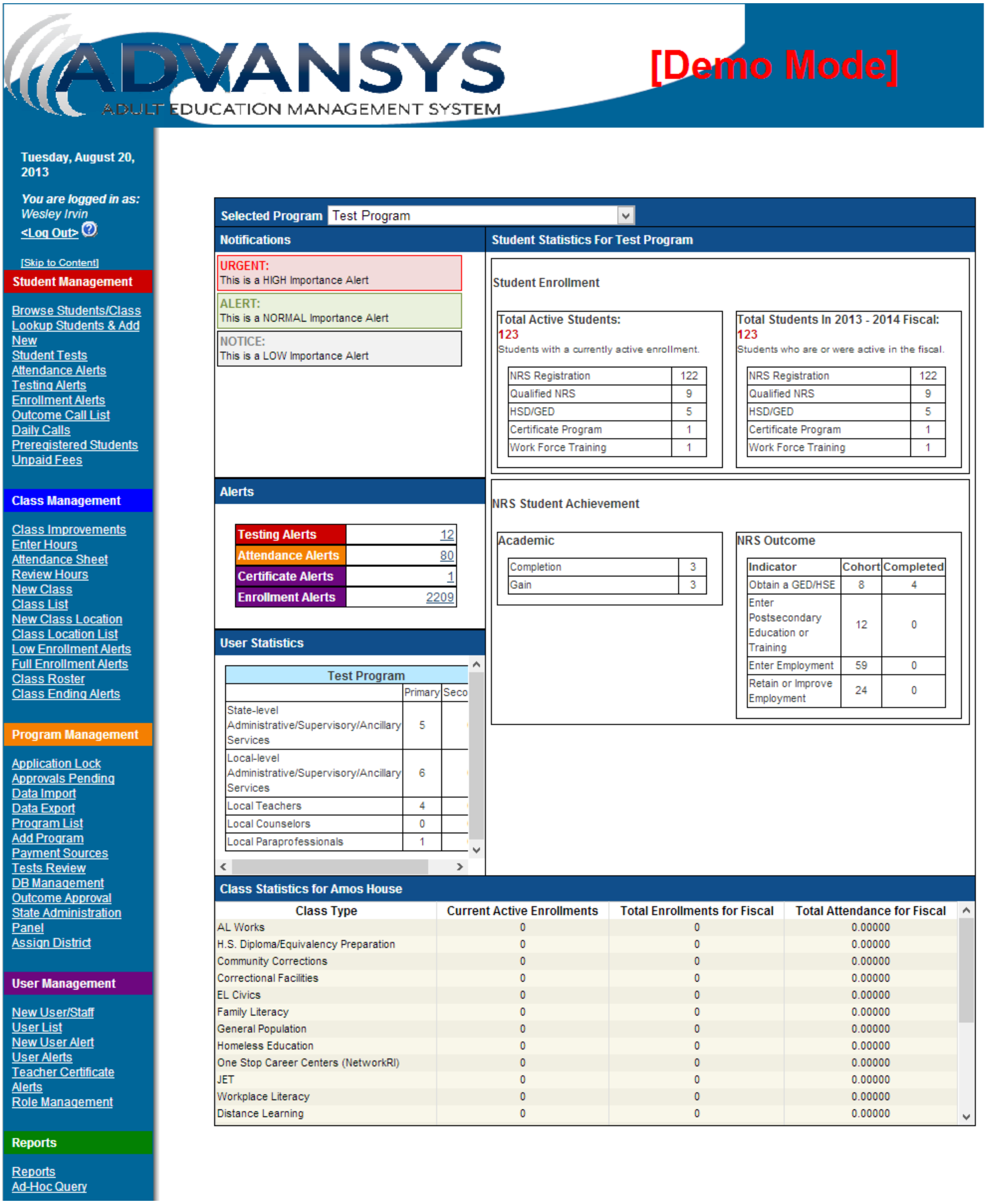
The password should be unique to the individual to protect data. Upon first login to the system, the password will be a generic password.

ALL users WILL be required to change the password to one that meets State level security requirements upon first log in to the system.

Clicking on the logo in the upper left corner of the page will return you to the home page at any time.

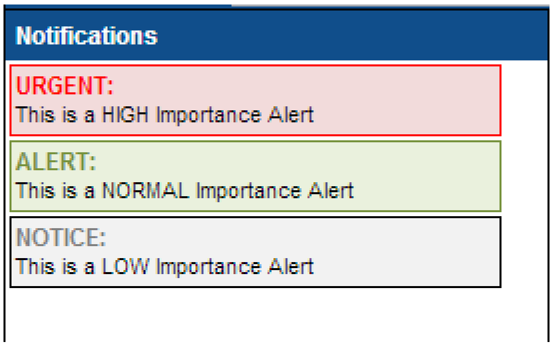
AT LOGIN

At Login, a user will be taken to the Dashboard.



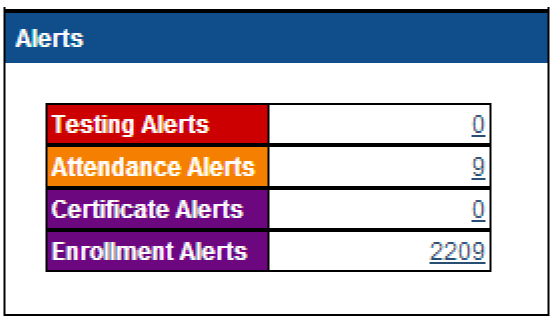
Dashboard

The Dashboard will display an at-a-glance view of your programs status in a number of areas:



Notifications

The "Notifications" section contains a display of the User Alerts.



Alerts

The "Alerts" section displays a snap-shot of the Testing, Attendance, Certificate, and Enrollment Alerts you already have.

The numbers displayed to the right of the alert are "clickable" and will direct you to that report with the details for it.

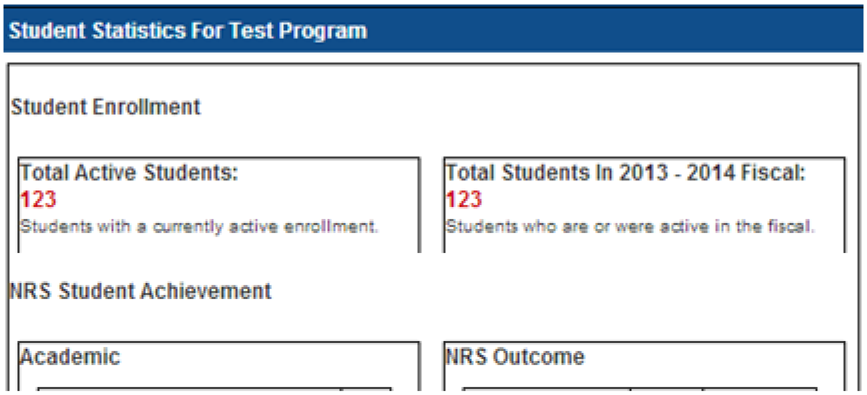
The items in the "Alerts" Section display as they always have:

- Testing Alerts – Students who have accumulated a number of hours between testing (as defined by The State)
- Attendance Alerts – Students who have not had attendance entered in a number of days (as defined by The State)
- Certificate Alerts – Teachers with certificates expiring in 180 days (OR as defined by The State)
- Enrollment Alerts – Currently enrolled students who are not placed in any class

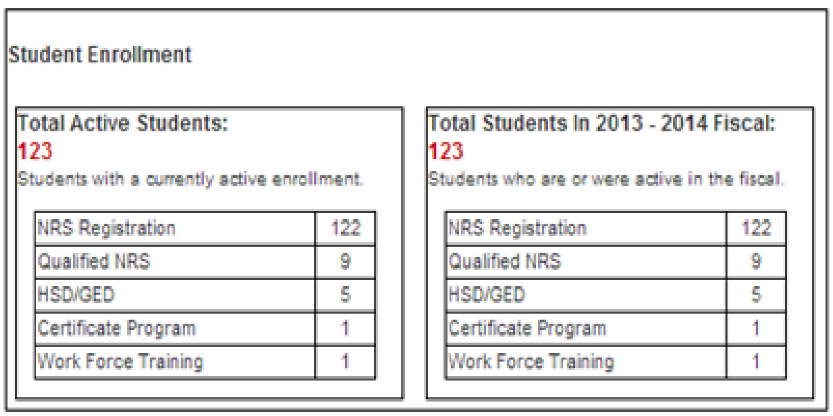
Student Statistics

The “Student Statistics” section is broken down into 2 main groups:

- Student Enrollment
- NRS Student Achievement



Student Enrollment

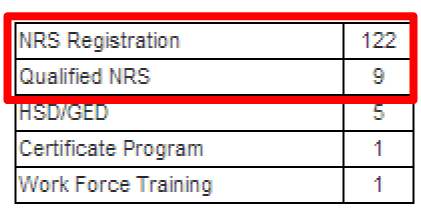


Student Enrollment will display total numbers for YOUR Program with regards to Enrollment Types and it is displayed as ACTIVE students compared to Current Fiscal YTD.

You will see the total number of students.

As well as the number of student by Enrollment Type.

You may notice that in the Student Enrollment section there may be data for “NRS Registration” and “Qualified NRS”.



What does “qualified” mean? We wanted a way to display not only the TOTAL number of NRS students in a program, but also give the user a sense of how many of those students have already met the reporting requirements for the NRS.

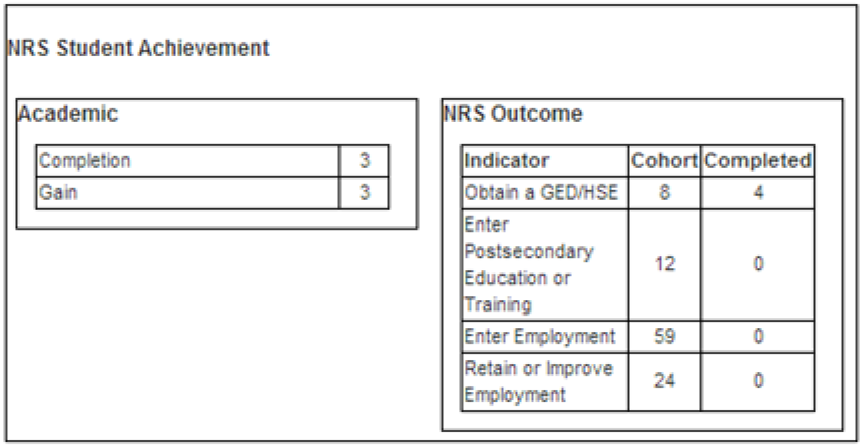
“Qualified NRS” is the number of NRS students who already have:

- 12 hours of NRS attendance that has been approved
- At least 1 test in the current fiscal that has been approved

> ***NOTE: “Qualified NRS” means that this number of students have met the BASIC requirements for inclusion however, they must further meet the SPECIFIC requirements for each respective NRS Table.***

- An active registration in the current fiscal that has been approved

NRS Student Achievement



NRS Student Achievement

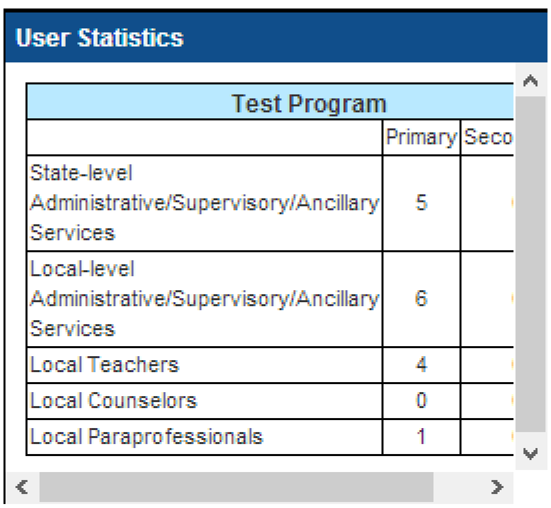
Academic

Completion	3
Gain	3

NRS Outcome

Indicator	Cohort	Completed
Obtain a GED/HSE	8	4
Enter Postsecondary Education or Training	12	0
Enter Employment	59	0
Retain or Improve Employment	24	0

NRS Student Achievement will display your Program's Completions and Gains as well as the number of students within a Cohort and the number completing for the Current Fiscal.



User Statistics

Test Program		
	Primary	Seco
State-level Administrative/Supervisory/Ancillary Services	5	
Local-level Administrative/Supervisory/Ancillary Services	6	
Local Teachers	4	
Local Counselors	0	
Local Paraprofessionals	1	

User Statistics

The "User Statistics" section will display the number of users with a particular Employment Type (per Table 7) for your program and will display the numbers as Primary v. Secondary affiliation.

Class Statistics

Class Statistics for Test Program

Class Type	Current Active Enrollments	Total Enrollments for Fiscal	Total Attendance for Fiscal
AL Works	0	0	0.00000
H.S. Diploma/Equivalency Preparation	0	0	0.00000
Community Corrections	0	0	0.00000
Correctional Facilities	0	0	0.00000
EL Civics	0	0	0.00000
Family Literacy	0	0	0.00000
General Population	0	0	0.00000
Homeless Education	0	0	0.00000
One Stop Career Centers (NetworkRI)	0	0	0.00000
JET	0	0	0.00000
Workplace Literacy	0	0	0.00000
Distance Learning	0	0	0.00000

The “Class Statistics” section will display the classes for the Current Fiscal Subtotaled by the Class Type.

You will see the number of ACTIVE enrollments, the total for the Fiscal; as well as the total hours of attendance for that Class Type for the Fiscal.

NAVIGATION MENU BAR

The navigation menu bar on the left side of the page is divided into sections:

Student Management

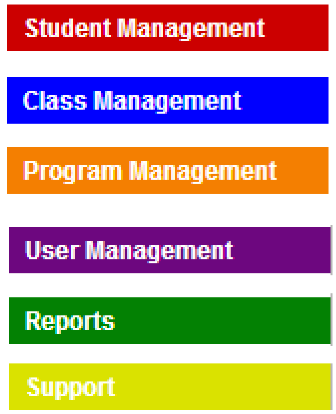
Class Management

Program Management

User Management

Reports

Support



The assigned user role status will determine the number of subtitles accessible.

USING ADVANSYS

SECURITY INFORMATION

The system requires a secure login and password for access. Login credentials should be provided by your Program Administrator or by a State Level supervisor.

For security reasons the system will time out after a set interval. Any data not entered when the system times out will be lost.

In order for data to be retained, the data on that page must be submitted. Submission occurs typically with Next or Continue buttons at the bottom of each page of entry.

The system does not recognize typing as activity. System time out calculations begin with data submission and continue until the next submission is made. If you type some information on the page and leave your computer, unless that page is submitted the data contained will be eliminated.

Submitted data remains within system and can be accessed using search functionality.

User Management

The term user refers to any person who will either have access to or be tracked in the system. Users include teachers, data entry specialists, paraprofessionals, program administrators, support staff, and state administrators.

PRIMARY AND SECONDARY PROGRAM DESIGNATION:

For Table 7 purposes a user can have ONLY ONE primary program. The primary program is the program under which the user appears on Table 7 and is the only program with rights/authority to change data in the user's profile.

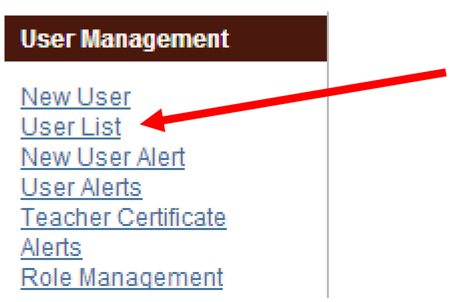
The primary program is determined when the user is initially created and/or activated.

Other programs can access the user by adding their programs as a secondary designation. This will give those programs the right to assign roles to the user which will give the user access to the appropriate data in other programs and also allow secondary users to be assigned as teachers in those programs.

USER SEARCH:

As this is an enterprise-wide system, users may be shared among and have various roles in more than one program. In order to keep accurate state-wide reports and more specifically provide unduplicated data on NRS-tracked personnel, a single record should be maintained for each user. Before entering a user, the system should first be searched to determine if the user already has a profile (either active or inactive) in the system.

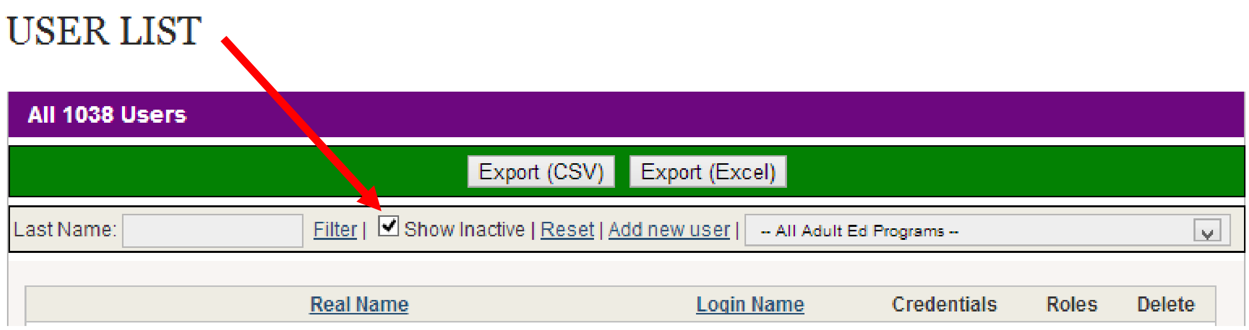
Under **User Management** click on the "**User List"** link in the menu bar.



The User List will display by default a list of all active users over whom you have access. (Those users in YOUR Program.)

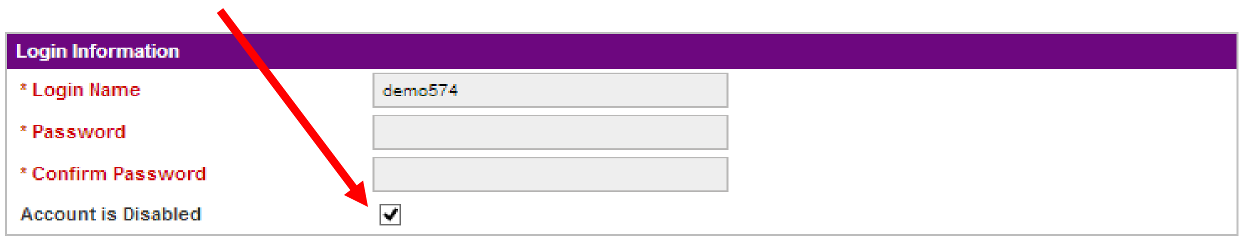
Access to users is determined by the program assignment options in the user profile.

To view a list of users assigned to your program who are no longer active, select the “Show Inactive” checkbox to refresh the user list.



ACTIVATING A USER

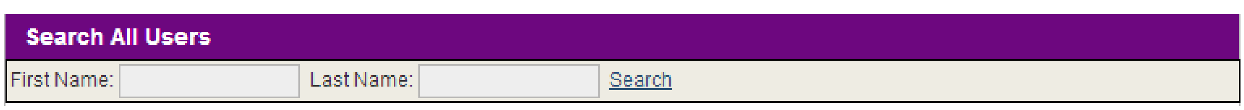
To activate an inactive user, click on the user’s name to access the user profile, uncheck the “Account is Disabled” box and save the user profile. It is suggested that the profile be updated prior to activation.



If the user is inactive and was not active during the fiscal year in another program, the program which activates the user should assume the position of primary program by updating the employment information. If the employment information is unable to be accessed, the user can be assumed to have or have had an active participation in another program during that fiscal year.

SEARCHING FOR USERS OUTSIDE THE PRIMARY PROGRAM

To search for users who are not assigned to the primary program over which you have jurisdiction, use the “Search All Users” block at the bottom of the user list.

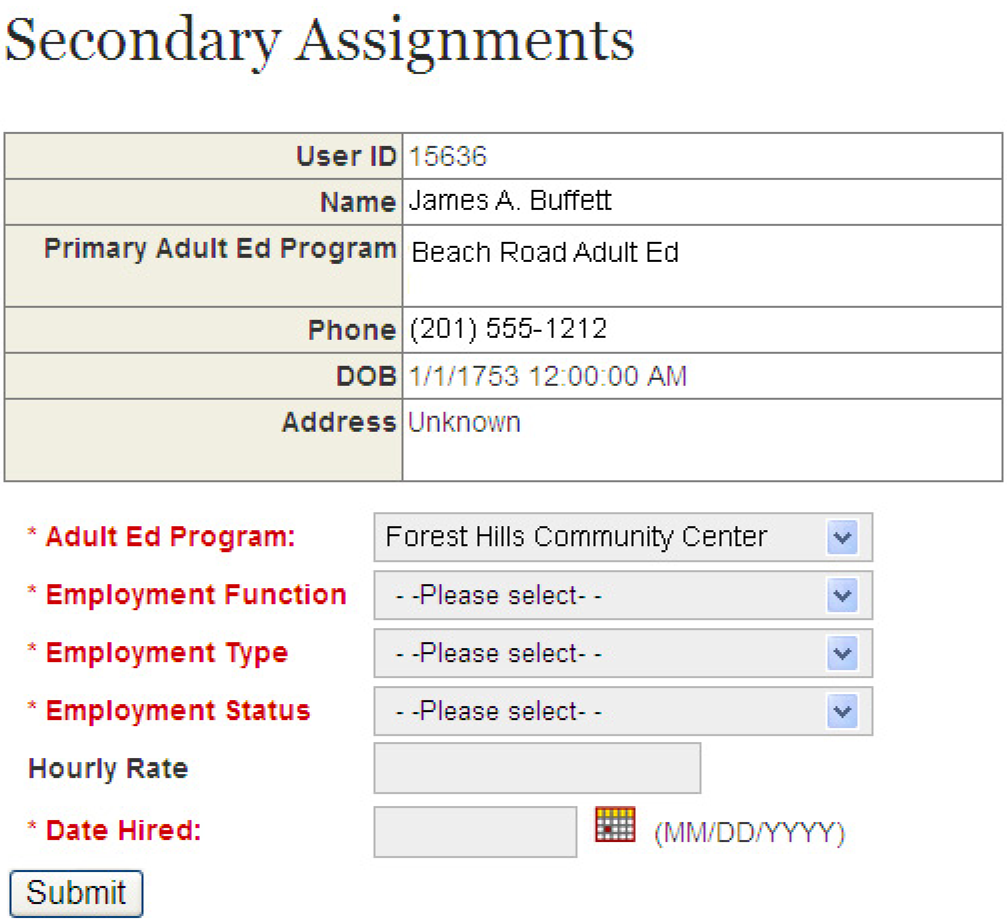


This search feature will generate a list of all users in the system regardless of which program has them listed as primary.

Once the user who has a primary designation in another program is located, a secondary designation should be added to his/her profile in order to allow roles to be assigned.

SECONDARY PROGRAM ASSIGNMENT

Assigning a secondary program is much like the assignment of primary program. When the user is located, is not in active in the program, selecting his/her name will generate a Secondary Assignment page. (See below)


Secondary Assignments

User ID	15636
Name	James A. Buffett
Primary Adult Ed Program	Beach Road Adult Ed
Phone	(201) 555-1212
DOB	1/1/1753 12:00:00 AM
Address	Unknown

* Adult Ed Program:	Forest Hills Community Center
* Employment Function	- -Please select- -
* Employment Type	- -Please select- -
* Employment Status	- -Please select- -
Hourly Rate	
* Date Hired:	(MM/DD/YYYY)

Submit

The program which is currently the primary program is displayed in the basic biographical information at the top of the screen. From this screen a secondary Program, Function, Type, Status, and Date of Hire MUST be entered for the secondary program. The Hourly Rate is an optional field.

SECONDARY PROGRAM PROCESSING RULES

If a user is inactive, is currently assigned to another program as the primary but has not been assigned to a role in that program for the current fiscal, the program that activates that user will become the primary program and have access to the user profile at that point. The program which activates the user will gain that user on Table 7 if the user is reported.

If a user is inactive, assigned to another program as the primary and has had activity in the current fiscal, the program which activates the user will only have rights to the user as a secondary program. This will allow the user to be assigned roles and assigned to classes, but the secondary program cannot change personnel data and will not count the user on Table 7 if he/she is reportable.

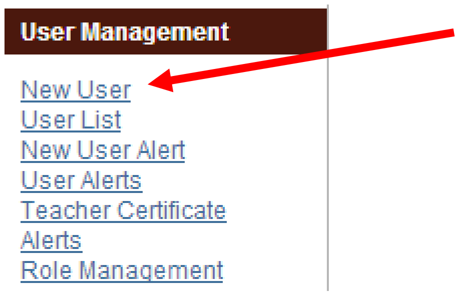
If a primary program wishes to deactivate a user who has secondary program designations, the primary program would relinquish control over the user to the secondary program, elevating the secondary program to the primary.

NOTE: For Table 7 purposes, the user would remain associated with the original primary program for the remainder of the fiscal year.

ENTERING NEW USERS:

If the user to be entered in the system has never been active before, a New User may be created.

Under **User Management** click on the "**New Users"** link in the menu bar



USER DEMOGRAPHICS

To proceed, you must have all of the user's personal information available

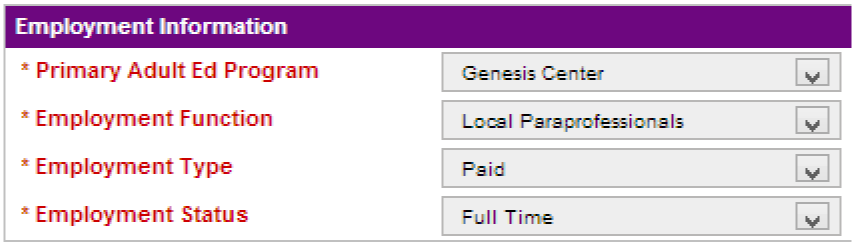
- Enter demographic information on all personnel
- Items marked in red are required

- In order for the user to later be able to use the "Forgot Password" reset function, the user must have a valid email address entered in the system and the "Receive Email" box must be checked.

> ***NOTE: Not ALL users will access the system, but all staff, tutors, and volunteers must be entered as "Users" in order to complete Table 7 correctly.***

EMPLOYMENT INFORMATION

NOTE: Employment Information is used to populate Table 7. The information in this block can be changed during the course of a year, but is locked at the end of each fiscal to preserve historical reports.

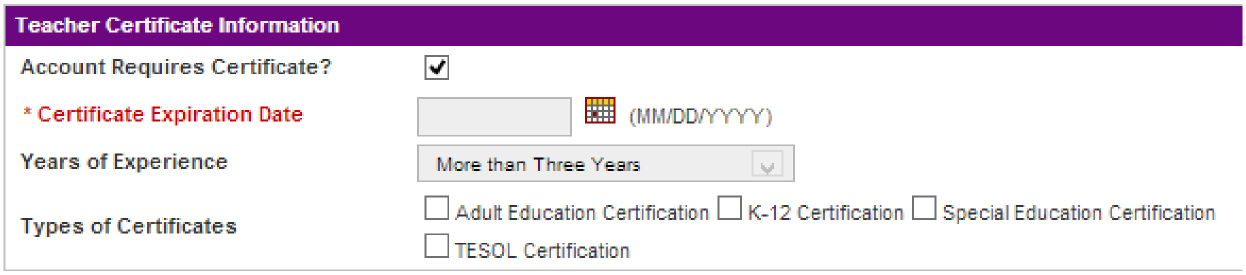


Employment Information	
* Primary Adult Ed Program	Genesis Center
* Employment Function	Local Paraprofessionals
* Employment Type	Paid
* Employment Status	Full Time

1. PRIMARY PROGRAM: Select the PRIMARY program the user will serve. The Primary Program is the program under which the user will appear on Table 7. A user may have functions in multiple programs and this can be addressed in the ROLES section, but for employment function purposes the user must be assigned to his/her primary program.
2. SECONDARY PROGRAM: Users may have secondary program designations which allow programs other than the primary program to assign roles and functions (such as a teacher for a class in another program). Secondary program should not be added during the initial entry of a new user.
3. EMPLOYMENT FUNCTION: Select the PRIMARY function the user will serve. A user may have multiple duties which will be addressed in the ROLES section, but for Table 7 purposes a user can have only one function (so as to show up on Table 7 only once).

    a. Any function can be assigned to any user.
    b. If Local Teacher is selected as the Employment Function, additional certification information will be required.

NOTE: EMPLOYMENT FUNCTION is "who you are" in the system and does not impact "what you can do." Permissions are managed via the ROLES section.



   i. Certification Expiration Date is the date the certifications checked last expire
   ii. Years of Experience populates the Years of Experience field in Table 7.
      1. Once entered for the user, this field will be locked.
      2. All future experience levels will be calculated for Table 7 by the system based on the user being assigned to an active/completed class during the course of a fiscal year
   iii. Types of Certificates: Please select the appropriate certificates for the user.
   iv. All Certification information must be completed in order to populate Table 7
c. NOTE: For teachers who may not require certification there are two options
   i. Use the function of “Not NRS Reported” for those teachers who may teach enrichment only classes should not be tracked on Table 7.
   ii. The Employment Function of Local Paraprofessional or Local Counselor will allow the user to be tracked and *if state policy allows*, users with those functions can be assigned the role of teacher.

4. EMPLOYMENT TYPE: Choose Paid or Volunteer
5. EMPLOYMENT STATUS: Choose Full Time or Part Time
6. HOURLY RATE (Not required): If you wish to use the system to generate teacher contracts for specific classes, you can track the hourly rate paid to teachers using this field.

LOGIN INFORMATION

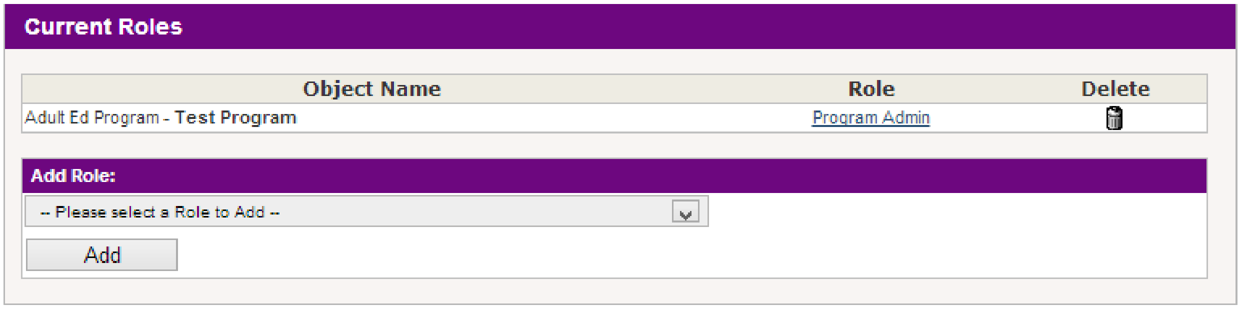
Password information is never viewable, even by the user or administrators. It can be reset from the user bio page, but never viewed.

1. Use state protocol to create a user name for the user.
2. Assign a password.
3. Retype the password

> ***NOTE: For new users the password is only temporary. The user will be forced to generate his/her password on first log-in.***

USER ROLES

The information in the Employment Information Box sets the user's position or function in the system. **User Roles define what functions the user can access.**



1. Roles are created at the state level. Each role has its own specific set of permissions.
    a. A Program Administrator role can see and manage data related to his/her program
    b. A Teacher can see and (depending on state roles) manage data related to the classes to which he/she is assigned.
2. Role assignment is limited by permissions. A Program Administrator can assign only the role of program administrator or lower and so on. Not all users can assign roles or create users.

NOTE: Assigning roles at this stage of the process is not mandatory for teachers. Roles can be assigned during the class creation module for teachers. In fact, in order to assign the role of Teacher, you must also assign a Class in which that user will have that role.

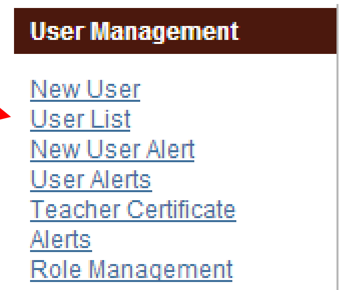
3. Users who are not assigned a role will have access to none of the navigational links until a role is assigned.
4. Users can be assigned multiple roles in the same program
    a. When two or more roles of varying permissions are assigned to a user in the same program (Data Entry person and Teacher, for instance) the role with the higher permissions takes precedent.
    b. Teacher roles are class-specific and will require the class designation. This can be done on the role assignment page as well as during the class-creation module.
5. Users can be assigned multiple roles across a spectrum of programs. A user may be a program administrator and see all data for one program, but also be a teacher in another and see only data related to the class to which he/she is assigned.

DEACTIVATING A USER

When Users /staff / tutors are no longer employed or volunteering for a program, then their profile should be deactivated in order to maintain accurate records for Table 7.

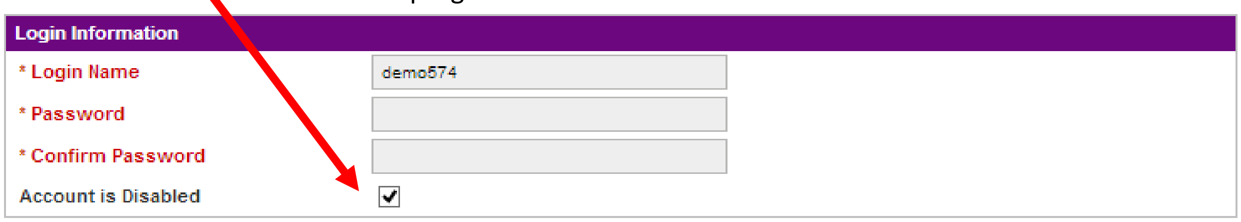
To deactivate a user:

Click on “**User List”** on the menu bar under **User Management.**



Click on the user’s name

- Select the box next to “**Account is Disabled”**
- Click Update User Bio
  - The user will remain on the User List as disabled since information is tied to the user within the program



Keep this information current. The system tracks dates of activation/de-activation in order to accurately populate Table 7.

Class Management

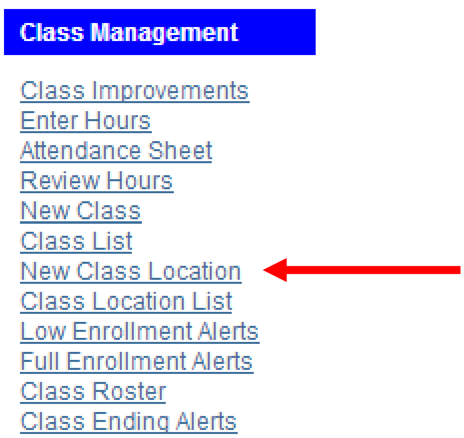
CLASS LOCATIONS

Prior to the creation of a Class in the system, at least one class location must be entered for the program.

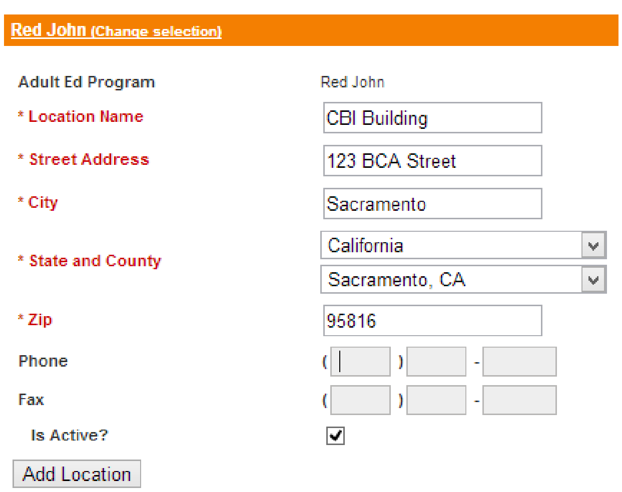
Class Locations are used to help manage programs with multiple sites or campuses. Using the Class Location feature a program can now more easily track where instruction actually occurs.

CREATING A CLASS LOCATION

To create a Class Location select the New Class Location link under the Class Management section in the left hand navigation bar.



- Complete the required information marked in red.
- If the Location is to be active and displayed in selection menu on the Class Creation page, leave the “Is Active” box checked.
- Click Add Location and the newly created location will be added to the menu options when a class is created**



***There is no limit to the number of locations a program may have.*

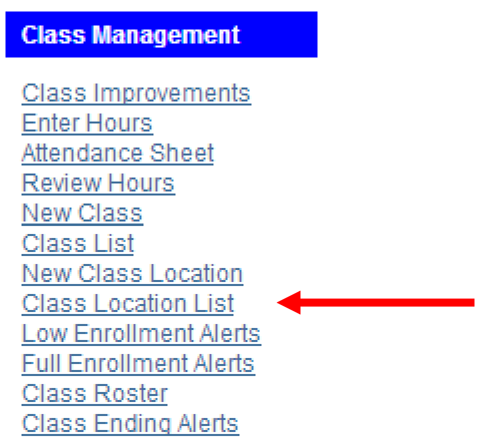
Class Locations can be edited, but it should be noted that any changes to a Class Location stored in the system will also alter historical information for all classes which had that Location designation.

> ***NOTE: If Class Location information changes but the prior information should be retained for historical purposes, it is recommended that a new Class Location be created and the old Class Location deactivated for archiving purposes.***

Each program will have a default Class Location stored in the system which will be based on the Program Address.

CLASS LOCATION LIST

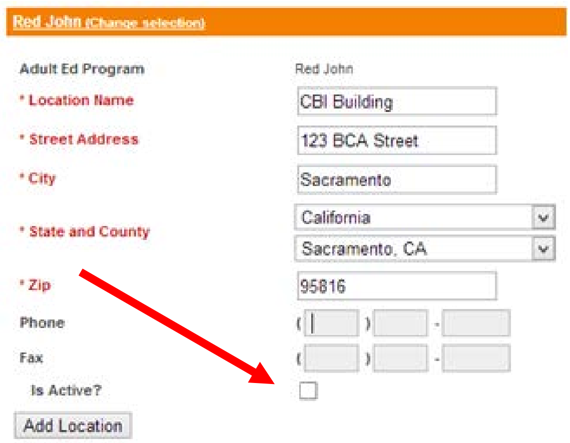
The system stores a list of entered locations which are available by clicking the Class Location List link under the Class Management Section on the left hand navigation bar.



The Class Location list does not cross reference against previously created locations. ***It is therefore recommended that prior to creating a new Location, the list of previously created locations be checked by clicking on the Class Location List link.***

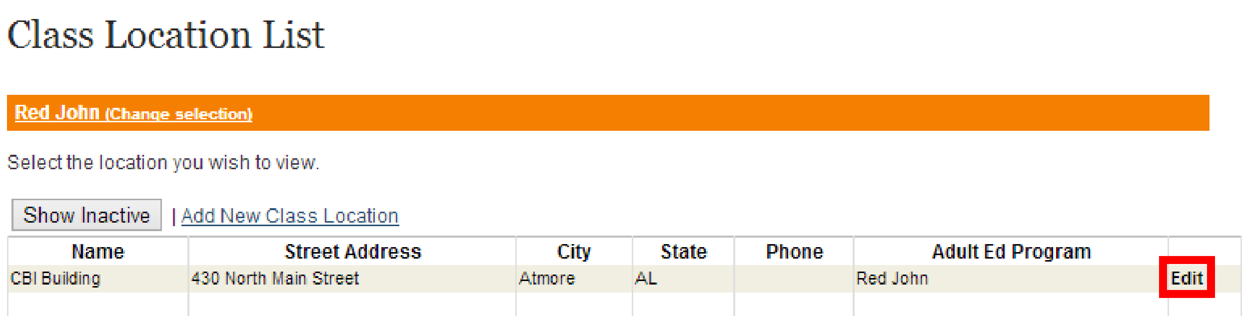
DE-ACTIVATION OF CLASS LOCATIONS

If a Class Location is no longer valid and should not appear in the menu selection, edit the Class Location by deselecting the “Is Active” checkbox.



MERGING CLASS LOCATIONS

If two Class Locations should be merged, select the “Edit” link for the class which should be merged.



The option to “Merge With Another Location” will be available in the edit menu.

Select the Class Location with which the selected Class Location should be merged and click on “Confirm”.

NOTE: The Class Location in the Merge dropdown is the Location which will be retained. The Class Location selected in the Edit function will be removed, leaving the merged location only. Once merged, this process cannot be reversed.

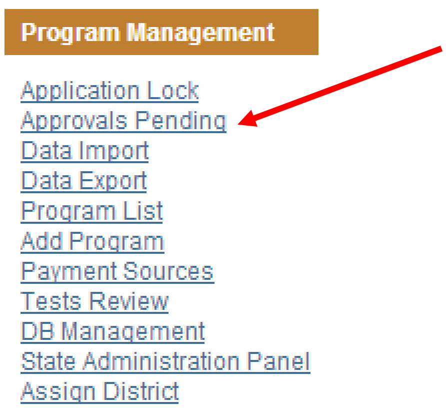
In the example below, the Wisteria Lane location would no longer exist and Windham Raymond AE would remain in the Class Location List.

Merge Wisteria Lane with:

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



Notifications regarding Approvals Pending 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.

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

Student doesn't show on Table 4

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:

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) Did you check his state of residence? Is the report filter set to "All States"?

Panic Button Situation 2

<u>Student Gain 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 again! 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

<u>Student's EFL Level seems wrong</u>

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

<u>I Can't Enter Attendance</u>

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.

> ***NOTE: 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 Placement 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.

On these reports, the included information is:

- 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:

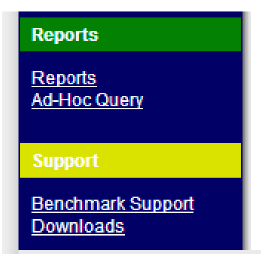
- Do some troubleshooting.
    - Is this issue covered in the Panic Situations?
    - Have I tried the recommended resolutions?
    - Have I seen this before?
- Determine the type of issue.
    - Is this a "break" that needs fixing?
    - Is this something that the system does not currently do but you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

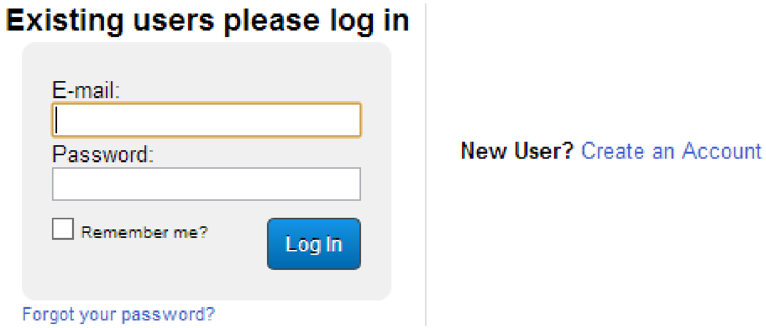
SUBMITTING TROUBLE TICKETS

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.

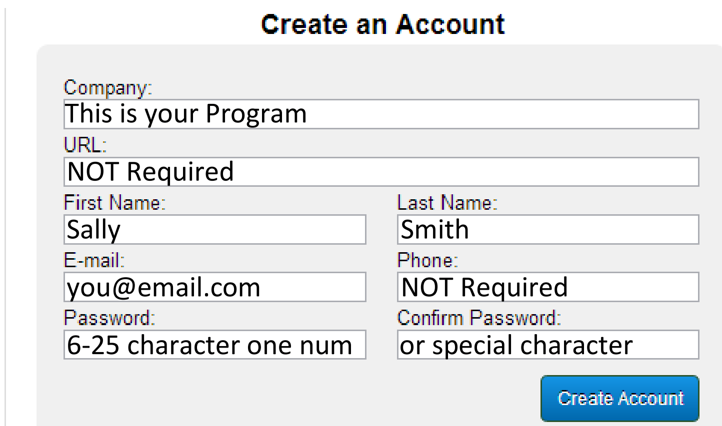


Enter your e-mail and password to log in to the system. If you have never submitted a trouble ticket in the new system, you will first need to establish an account.



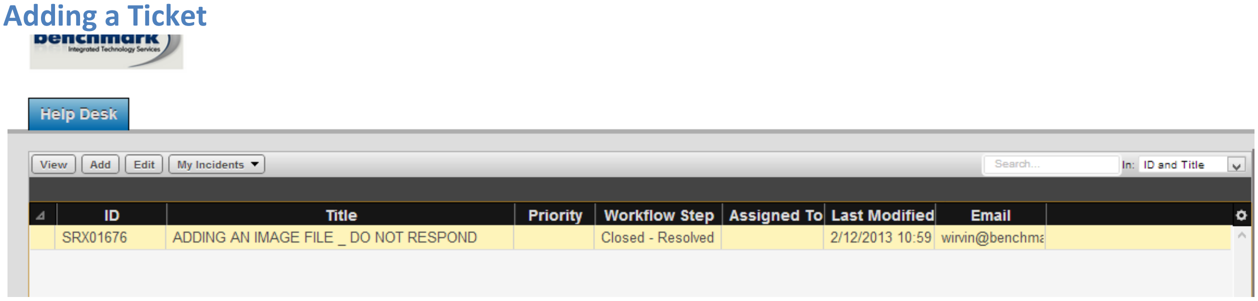
Account Creation

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

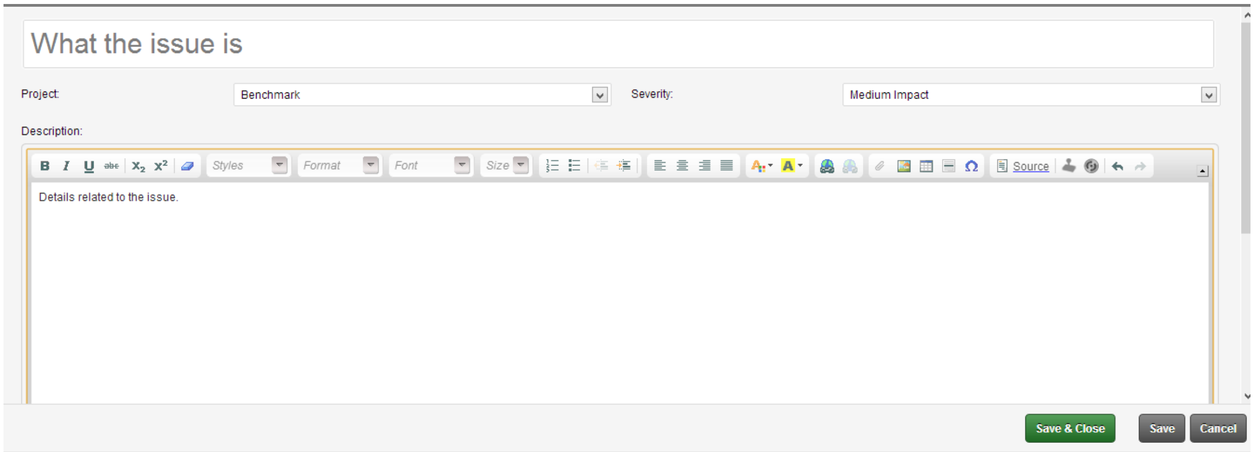


Once you have created an account and / or logged in you will see the ticketing dashboard.

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.

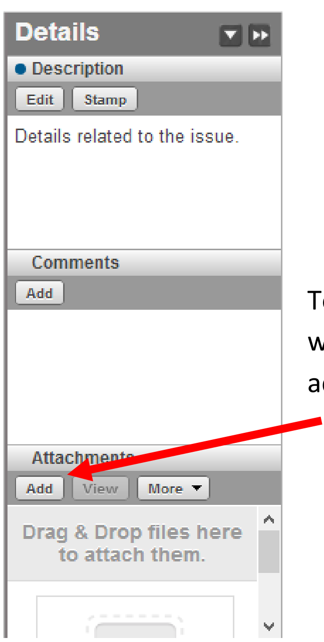


Fill in the information for the Title, Severity, and the description of the issue. When finished, click on "Save & Close".

NOTE: You may also send a ticket request to Benchmark by sending an email to support@benchmarkits.com or by clicking the* Support *button at the top right of every page.

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

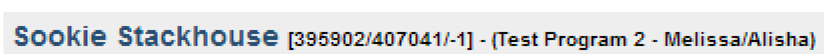
The most common way that support will communicate with you in regards to an issue via email. When you receive an email from support related to a ticket, you will see something similar to "Re: Incident [#SRX01676] ". You will be asked to respond to the email and it will be added to your ticket.

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.

<u>Table 4 and Variants</u>

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.

<u>Table 5</u>

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.

<u>Table 6</u>

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

  <u>Program Type</u>
- 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.

  <u>Institutional Programs</u>
  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.

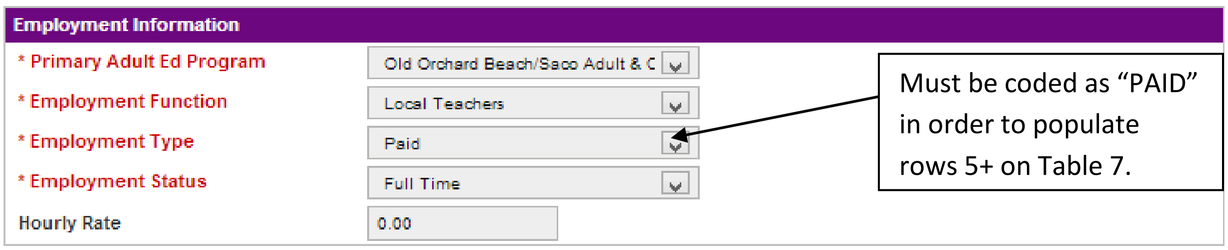
Secondary Status Measures

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.

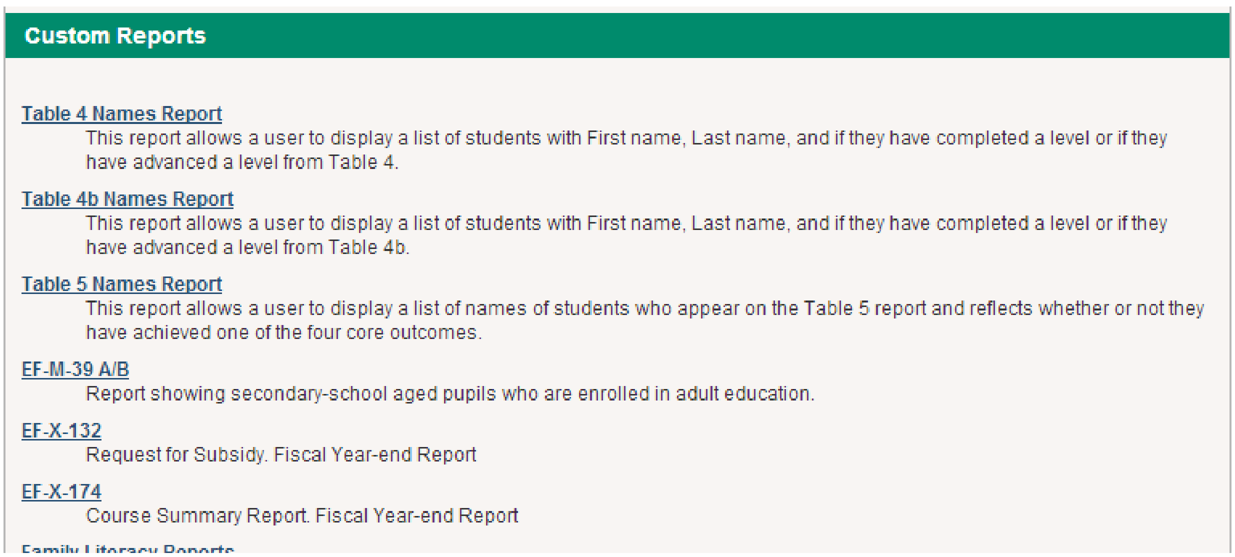
CUSTOM REPORTS

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.

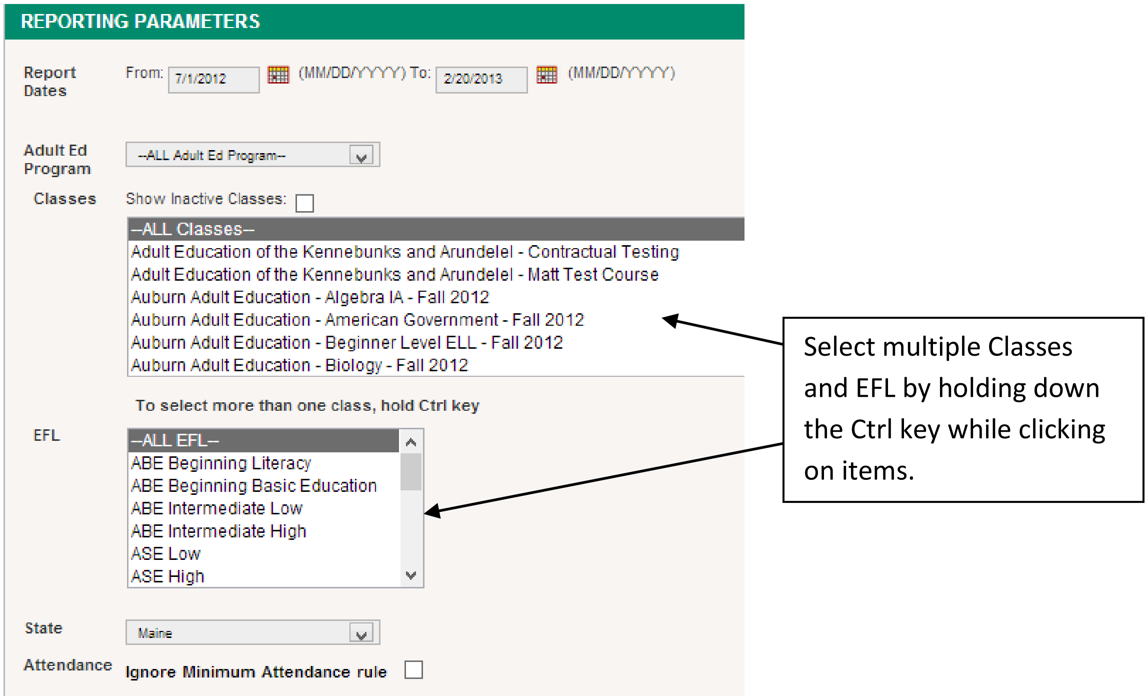


Table 4b Names

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

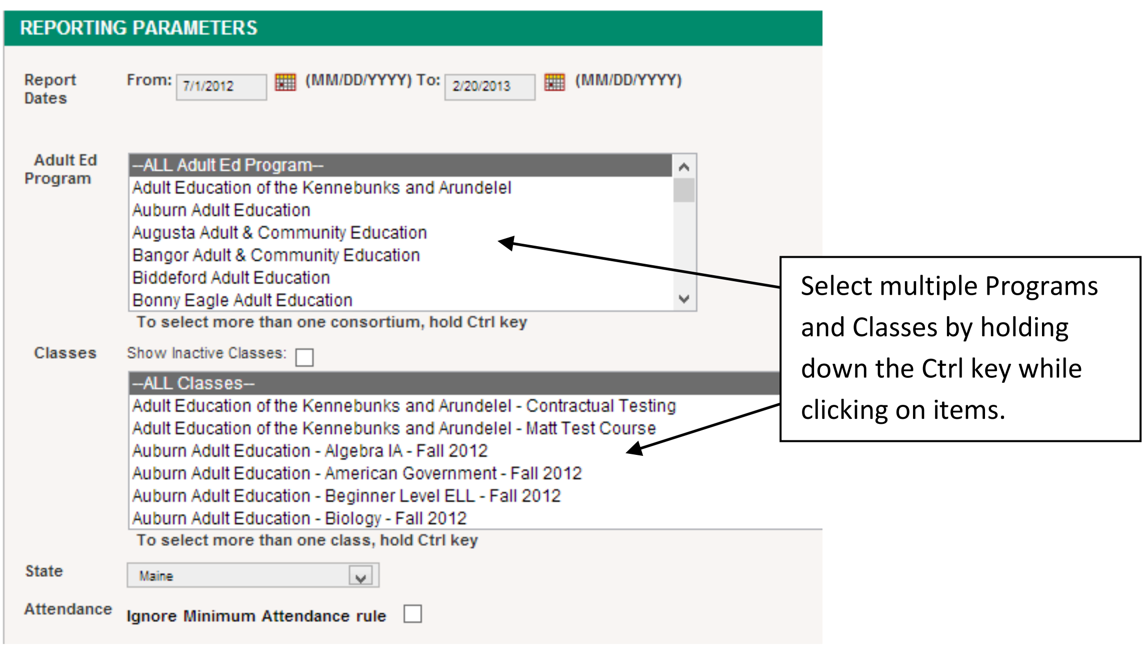
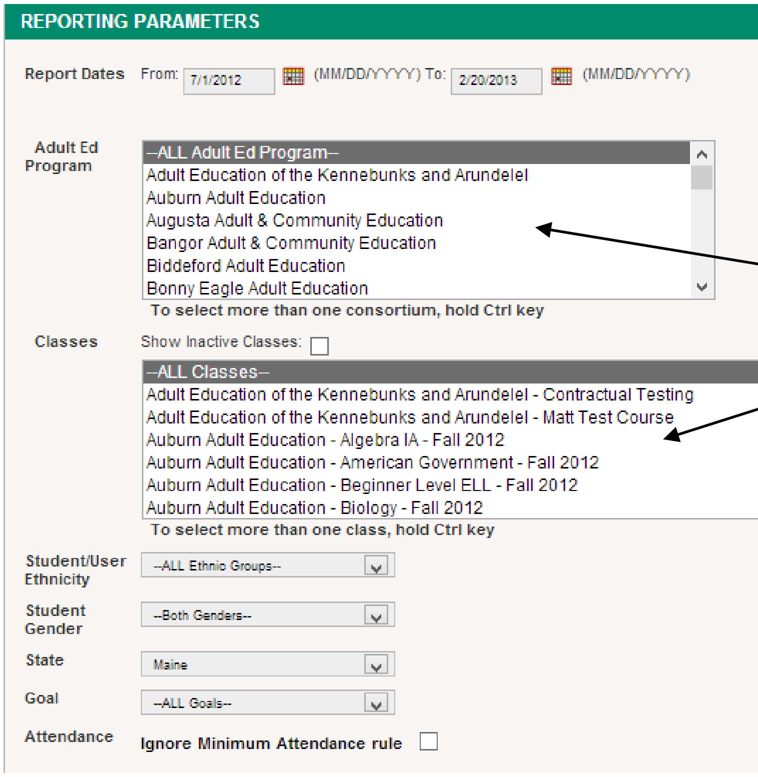


__Table 5 Names__

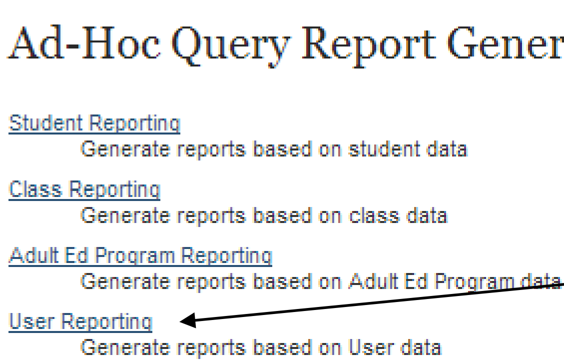
The Table 5 Names Report may also be filtered by Ethnicity, Gender, and Goal.



Select multiple Programs and Classes by holding down the Ctrl key while clicking on items.

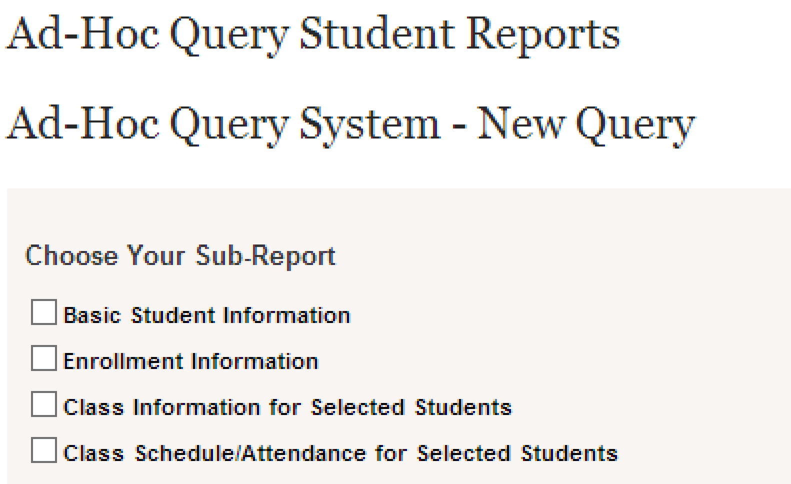
AD-HOC REPORTING

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.



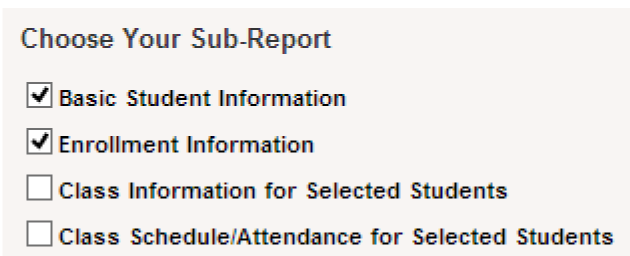
The User Reporting Section enables you to save and re-use previously generated reports you may use often without having to reenter the parameters.

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.



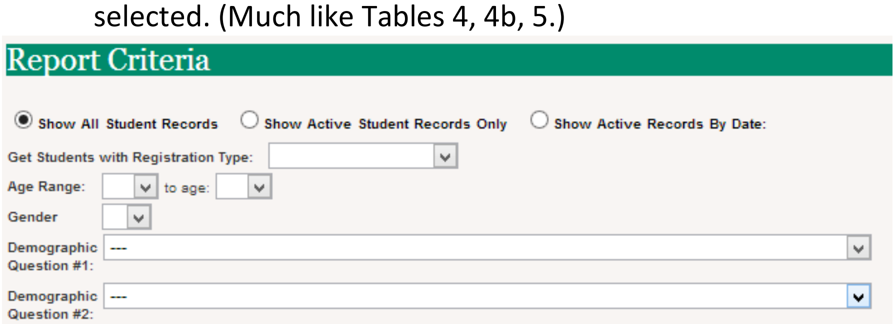
Here we have selected Student Reports and now you will check the type of information you wish to include. As you make your selection(s), the system will refresh to display the specific data elements available in that sub-report.

Below, we have selected "Basic Student Information" and "Enrollment Information".

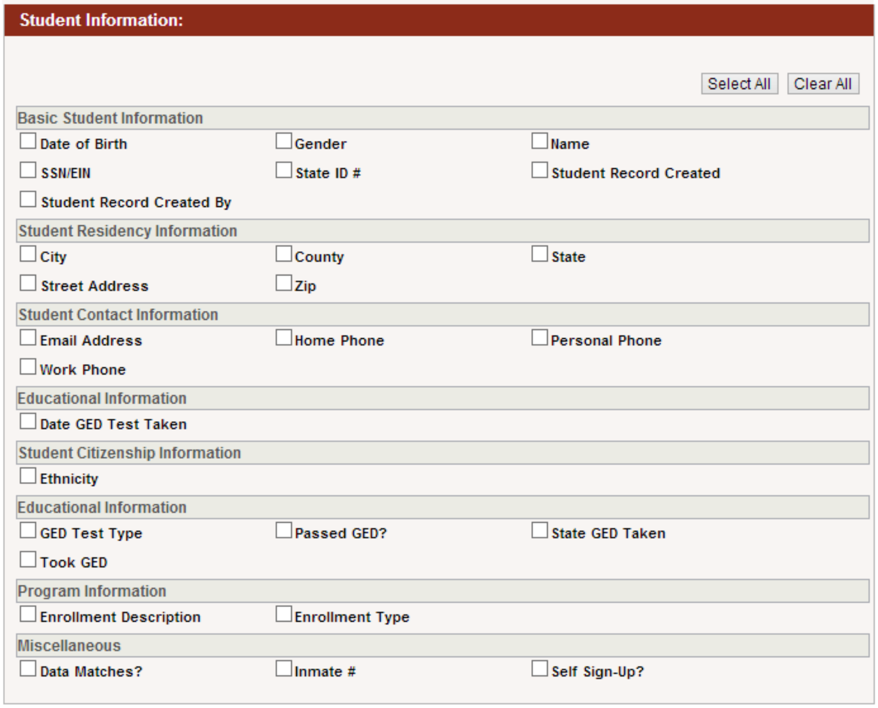


I now have 3 sections on my screen:

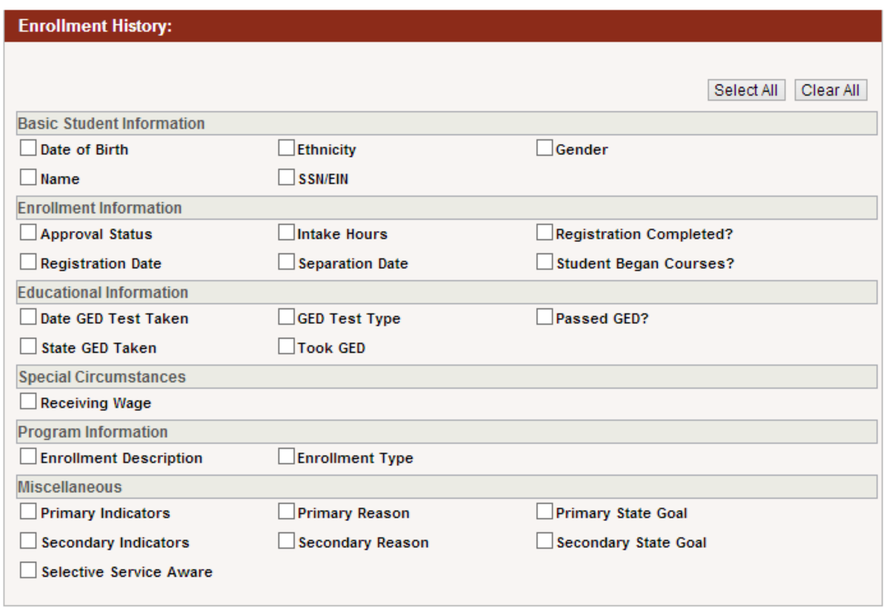
1. Report Criteria – This will limit the amount of information displayed. (It is a filter.) This will display for all creations but the information available depends on the sub-report selected. (Much like Tables 4, 4b, 5.)



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

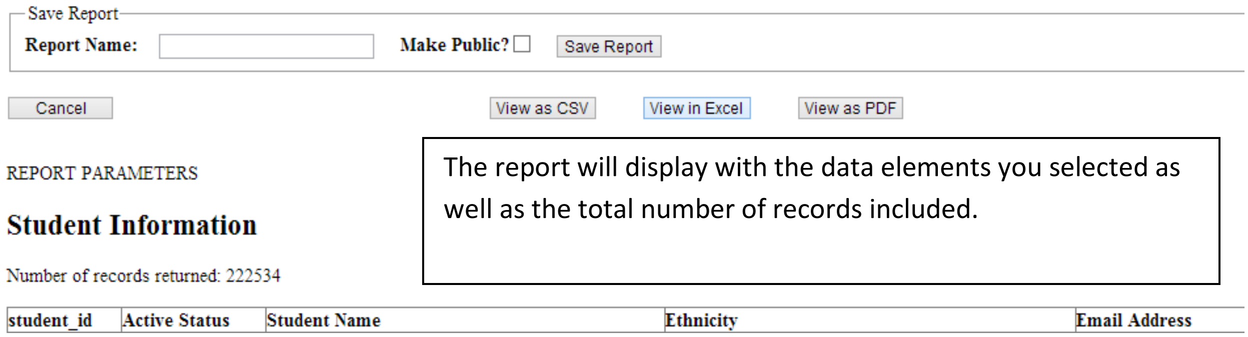


3. Enrollment History – These are the data elements you wish to display.



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”.



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 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

*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.

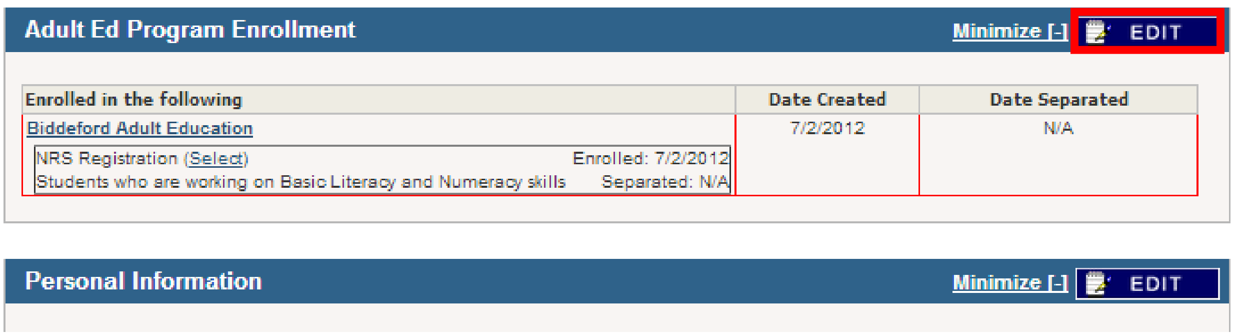
NOTE: Prior to Separating a student it is recommended that approvals for all student data have been entered. Unapproved data will not be included in the student record.

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

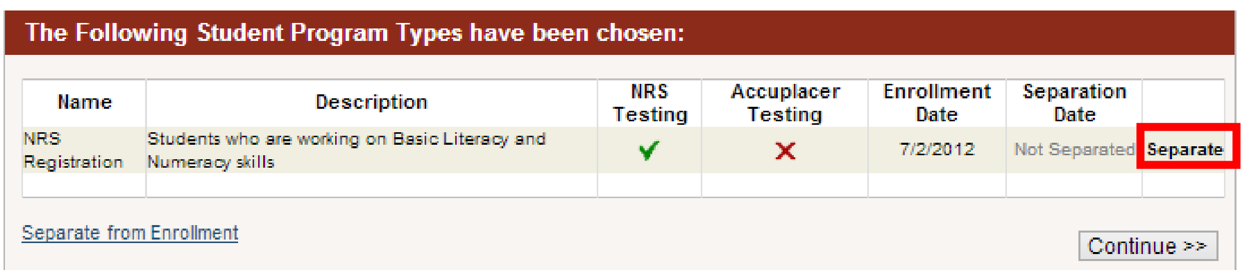
Separating a student from the NRS Registration will not cause the loss of any data.

To Separate a Student:

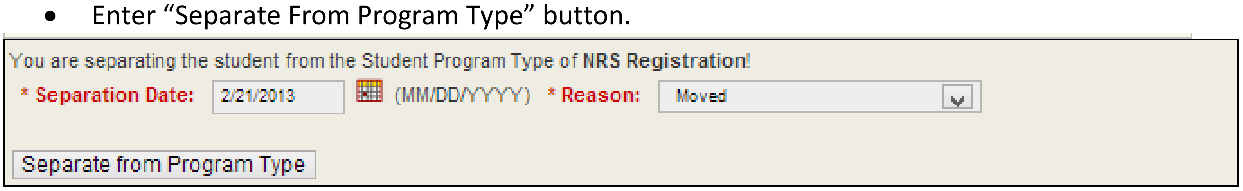
- Locate the student by searching or browsing for his or her record in the system.
- Click the EDIT button in the Adult Education Enrollment Block of the student profile.



- 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!

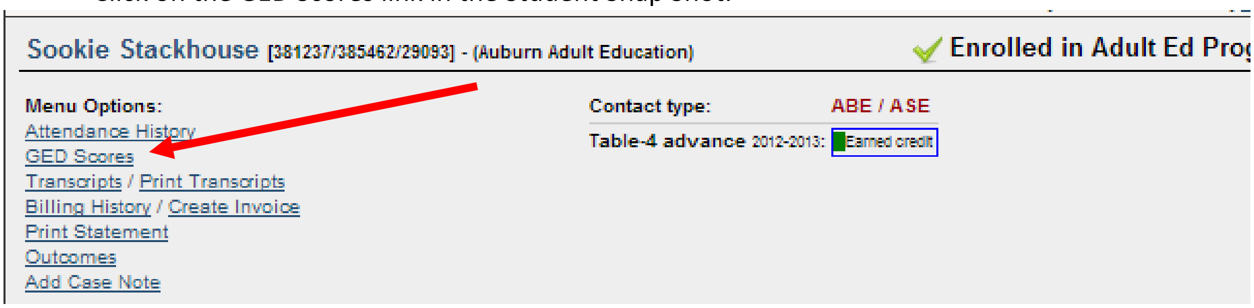
- **Do** separate those who should appear on Table 5. Active students do not appear on Table 5.
- At the end of the fiscal year the system will generate a PENDING SEPARATION for all students.
- If the student is re-activated the pending separation will be removed.
- **Reactivation is triggered by the 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.
- ***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"

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.

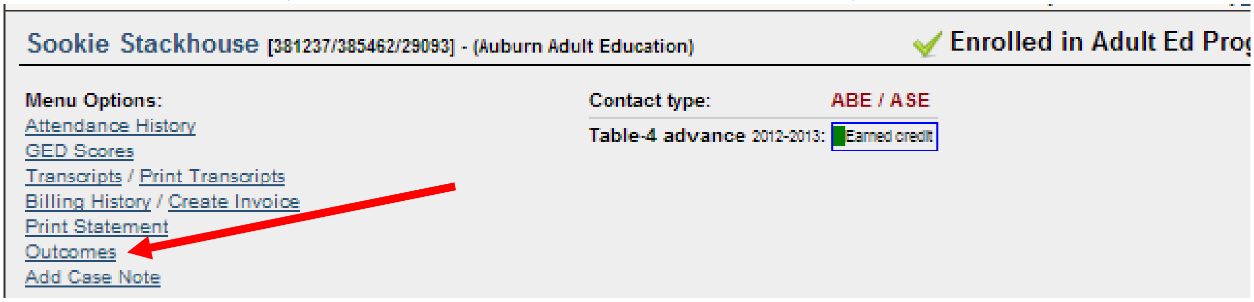
Test Date	Test Mode	Status	Entered	
2/21/2013	GED Official	Pass	2/21/2013	Delete Edit

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.
- 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: 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.

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 FOR 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.