Training Manual

REVISED:

August 26, 2013

Training Manual: Revised August 2013

Table of Contents

Welcome! 7

Introduction 8

- Why is a Data System Required? 8
- History of the NRS 8
- Benchmark ITS History 9

Organizational Structure 10

- User Roles 10
  - State Level 10
  - User Roles 10

Getting Started ADVANSYS Website 12

- At Login 13
- Navigation Menu Bar 18

Using ADVANSYS 18

- Security Information 18

User Management 19

- Primary and Secondary Program Designation 19
- User Search 19
  - Activating A User 20
  - Searching For Users Outside The Primary Program 20
  - Secondary Program Assignment 20
  - Secondary Program Processing Rules 21
- Entering New Users 22
  - User Demographics 23
  - Employment Information 24
  - Login Information 25
- Password Change 26
- User Roles 28
- Deactivating a User 28

User Alerts 29
Viewing User Alerts 30
Class Management 31
Class Locations 31
Creating A Class Location 31
Class Location List 32
De-Activation Of Class Locations 32
Merging Class Locations 33
Creating New Classes 34
Teacher And Teacher Role Assignment 37
Class Start And End Dates 38
Portal Information 38
Class Schedule 38
Editing Classes 40
Closing Classes: 40
Copying Classes 42
Cancel/Delete Classes 42
Portal Uploads 45
Changes To Class Data 45
Syncing Class Enrollments 46
Class Improvements 46
Review Hours 47
Attendance Alerts 48
TESTING ALERTS 48
ENROLLMENT ALERTS 48
LOW ENROLLMENT ALERTS 49
FULL ENROLLMENT ALERTS 49
CLASS ENDING ALERTS 49
STUDENT MANAGEMENT 50
Student Search 51
Entering New Student 52

Student Bio 52
Student Enrollment 53
Student Demographic Data 54
Student Intake 55
Student Class Placement 56
Class Enrollment Info And Alerts 57
Allocating Online Registrations 57
Registering Allocated Students 58
Student Assessment 59
CASAS Appraisal Score Entry 60
Traditional And Non-Traditional Justification 60
Entering A Post-Test 60
Distinction Between Efl Leveling And Table 4 63
ACCUPLACER Entry 64
Outcome Measures 64
Attendance Entry 67
Attendance Sheet 69
Hours Entry 70
Unapproving/Deleting Attendance 72
Working With An Existing Student 73
MULTI-PROGRAM STUDENTS 75
Student EFL Calculation, Leveling And Table 4 76
Creating A New Battery 79
Difference Between Completion And Advance 79
Unapproving/Deleting Tests 80
Student Class Placement 81
Placing A Student In Classes 81
Class Enrollment Info And Alerts 82
Removing From Classes 82
Deleting From Classes 85
Approvals 86

Separating Students From The Program 87
Student Transcripts 91
Adding Records 91
Printing Transcripts 92
Course Schedule 92
Billing And Fees (Optional) 93
Billing History 93
Editing A Billing Entry 94
Deleting A Billing Entry 95
Applying Payments 95
Applying Refunds 96
Deleting Payments 97
Creating Invoices 98
Printing Statements 100
Unpaid Fees 101
Attendance Alerts 101
Testing Alerts 102
Outcomes Entry 103
MANUAL INDIVIDUAL OUTCOME ACHIEVEMENT DATA ENTRY 103
Daily Call Logs 107
Rollover Students 107
REPORTS 108
Federal Tables 108
Federal Table Aggregation Rules 109
Federal Table 4.1 110
Student Tables: Requirements For Inclusion On Table 5 And 5a 110
Student Tables: Inclusion On Table 6 110
Staff Tables: Inclusion On Table 7 112
Student Tables: Inclusion On Table 8 (Optional) 113
Student Tables: Inclusion On Table 9 (Optional) 113
Student Tables: Inclusion On Table 10 113

Student Tables: Inclusion On Table 12 (Optional) 113
Custom Reports 114
Table 4 Names And Table 5 Names 114
Ad-Hoc Query Engine 115
Student Reporting 115
Class Reporting 118
Program Reporting 120
User Reporting 122
Ending the fiscal year 124
Manual Outcome Entries 125
Manual Outcome Entry At Time Of Separation 125
Manual Outcome Entry After Separation Date 125
Cross Reference Table 126
The Panic Room 131
Student doesn't show on Table 4 131
Student Gain doesn't show on Table 4 131
Student doesn't show on Table 5 132
Students placed in wrong rows on the federal tables 132
Can't enter a test 133
Student's EFL Level seems wrong 134
I Can't Enter Attendance 135
Using Support Tickets 136
Glossary of Terms 138
Ad- Hoc Report Fields 143
National Reporting System (NRS) 2012 Changes 152
Frequently Asked Questions 152

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 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.

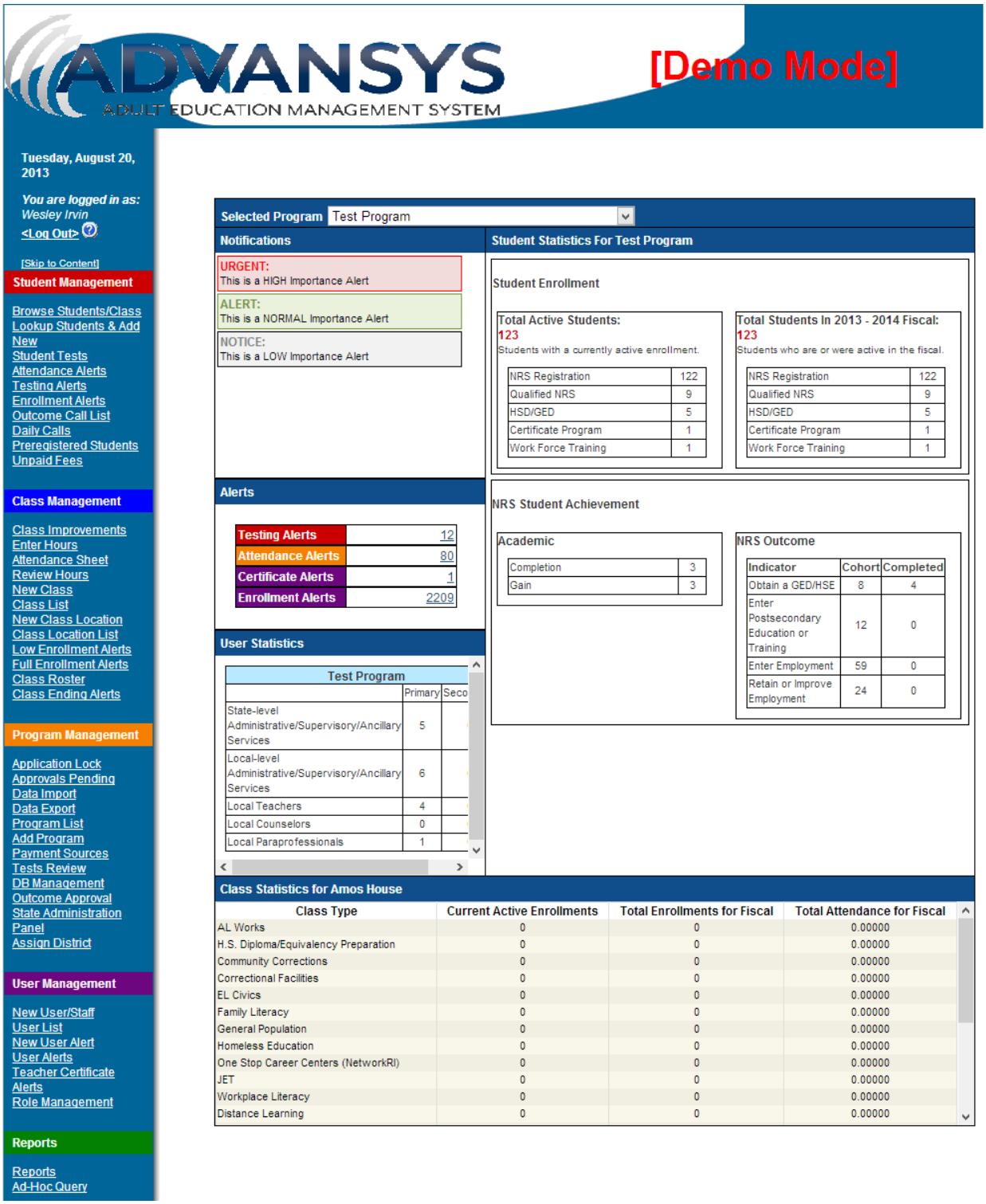
The password should be unique to the individual to protect data. Upon first login to the system, the password will be a generic password.

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.

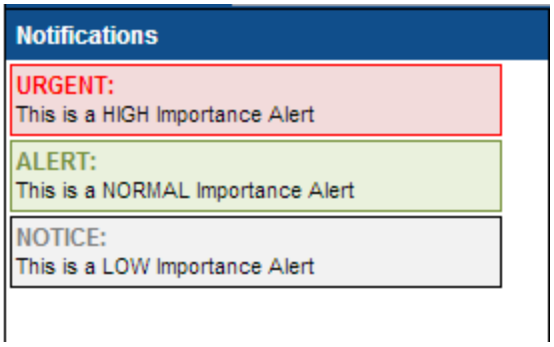
AT LOGIN

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



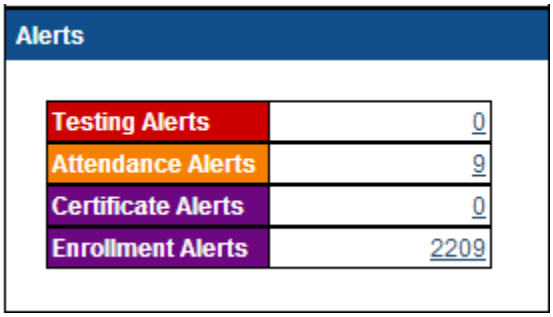
Dashboard

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.

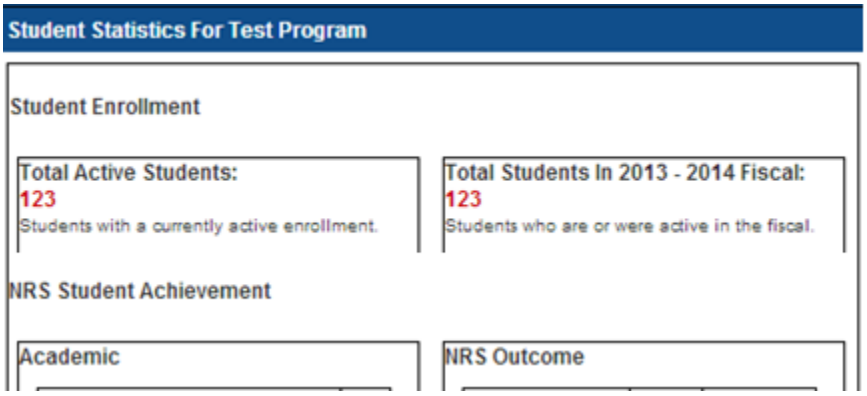
The items in the "Alerts" Section display as they always have:

- 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

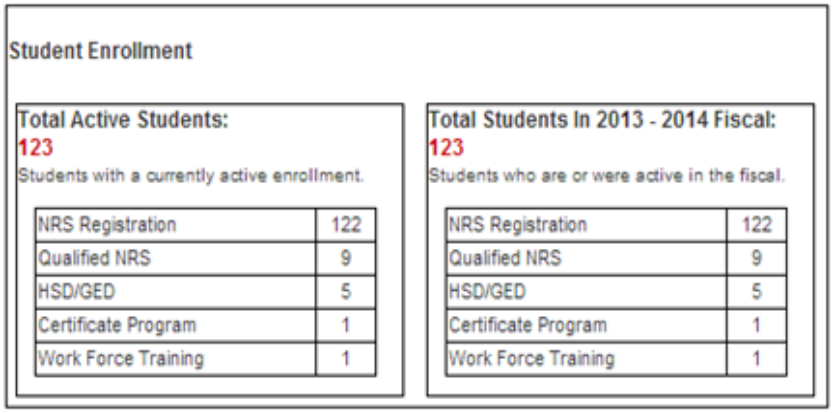
Student Statistics

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".

NRS Registration	122
Qualified NRS	9
HSD/GED	5
Certificate Program	1
Work Force Training	1

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
- An active registration in the current fiscal that has been

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.

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	Student Management
Class Management	Class Management
Program Management	Program Management
User Management	User Management
Reports	Reports
Support	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.

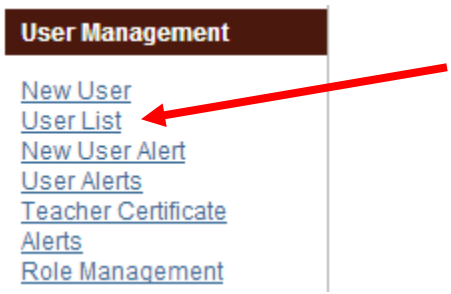
The primary program is determined when the user is initially created and/or activated.

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.

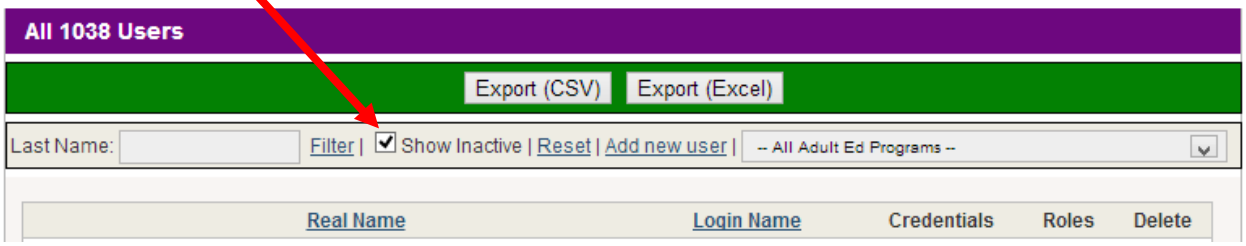


The User List will display by default a list of all active users over whom you have access. (Those users in YOUR Program.)

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

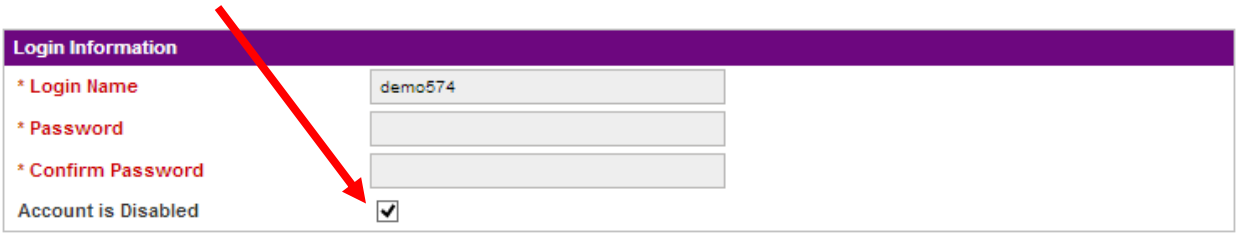
To view a list of users assigned to your program who are no longer active, select the "Show Inactive" checkbox to refresh the user list.

USER LIST



Activating A User

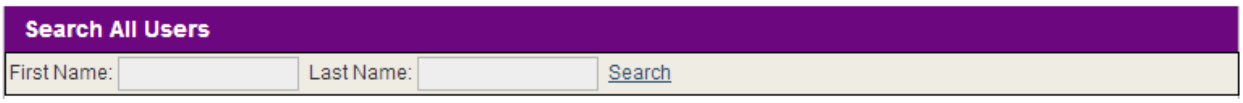
To activate an inactive user, click on the user's name to access the user profile, uncheck the "Account is Disabled" box and save the user profile. It is suggested that the profile be updated prior to activation.



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.

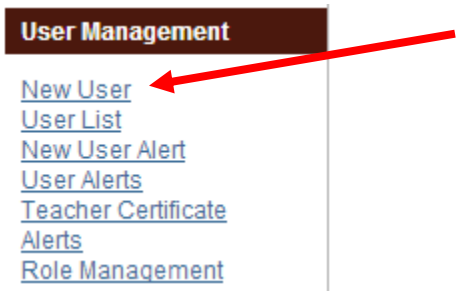
If a primary program wishes to deactivate a user who has secondary program designations, the primary program would relinquish control over the user to the secondary program, elevating the secondary program to the primary.

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

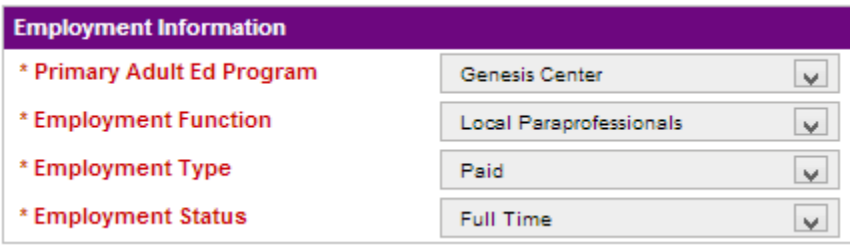
- Enter demographic information on all personnel
- Items marked in red are required

- 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

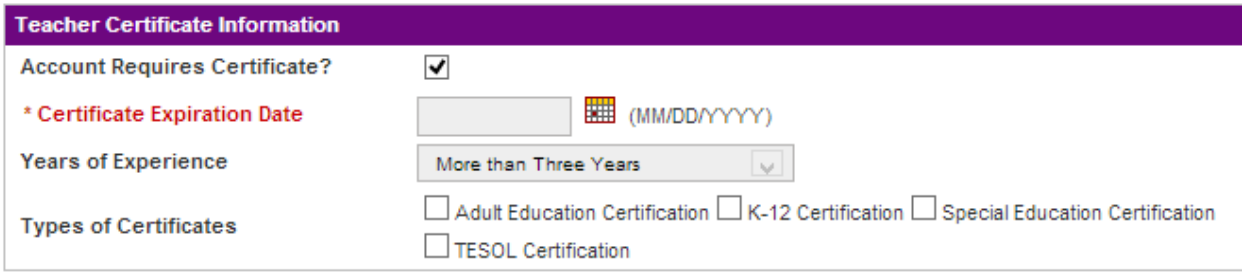
Note: Employment Information is used to populate Table 7. The information in this block can be changed during the course of a year, but is locked at the end of each fiscal to preserve historical reports.



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).

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.

   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.



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

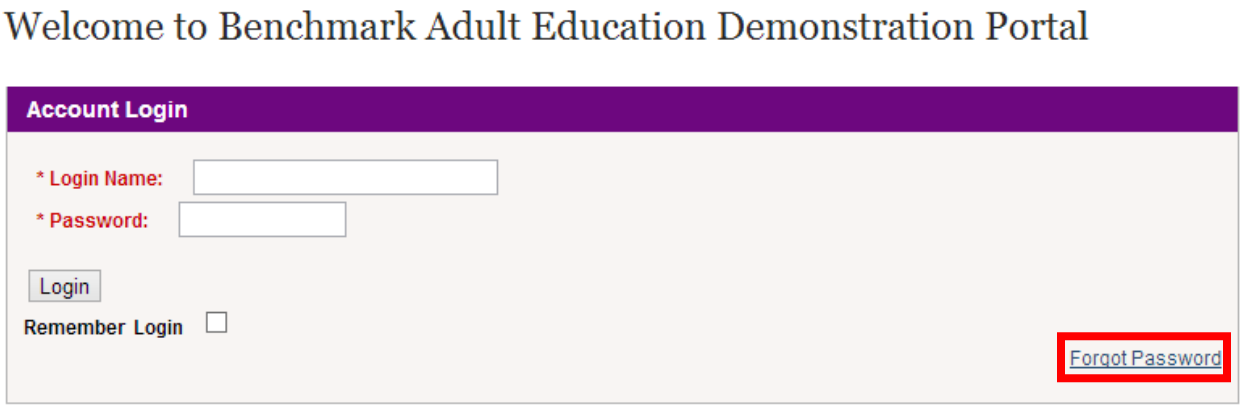
Note: Password information is never viewable, even by the user or administrators. It can be reset from the user bio page, but never viewed.

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.

PASSWORD CHANGE

Users may change their own passwords by using the password reset function on the login page only if the user has an email address entered and the "Receive Email" box is checked.



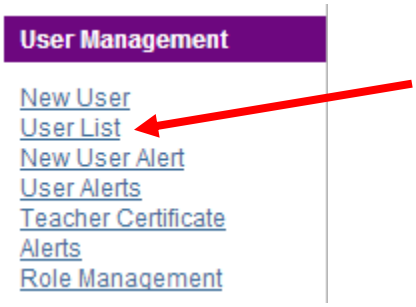
Strength of Password

When a user creates a new password, protocols are in place to measure the strength of a user's chosen password. There is no strength requirement, this is merely a notification.

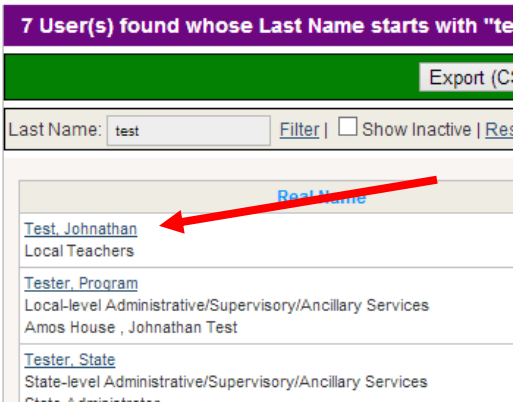
Password Change

If requested users with the appropriate permission can change a user's password-

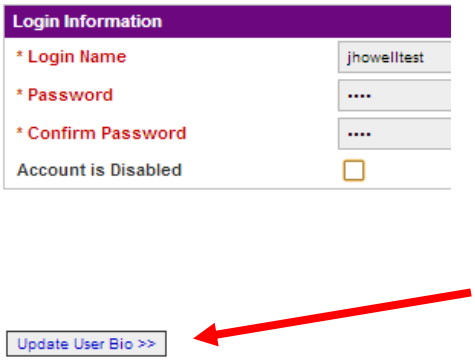
- Click on **User List** on the menu bar under **User Management.**



- Find the user in question by searching by last name. Click on the user's name.



- Enter the new password and confirm by re-entering the password then click "Update User Bio"

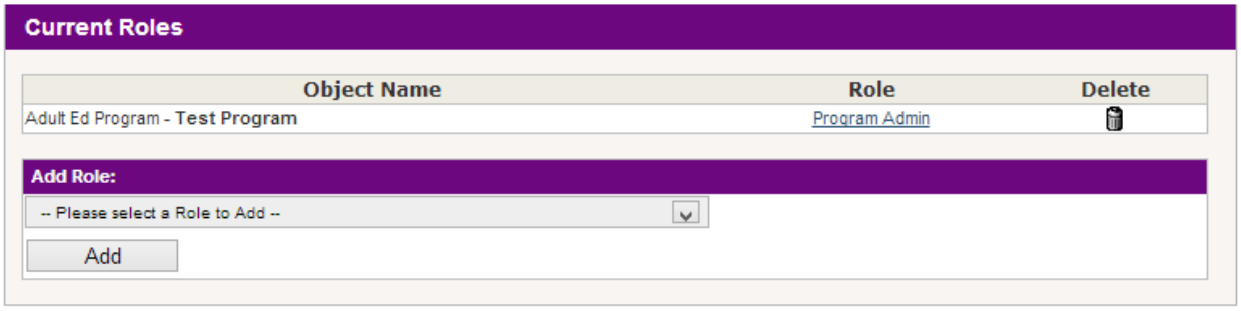


- The new password will be used the next time the user logs into the system.

NOTE: Users can change their own passwords by using the Forgot Password link on the login page or by logging in, clicking on their name in the upper left of the Navigation bar, scrolling to the bottom of the user information page and entering/confirming a new password.

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.

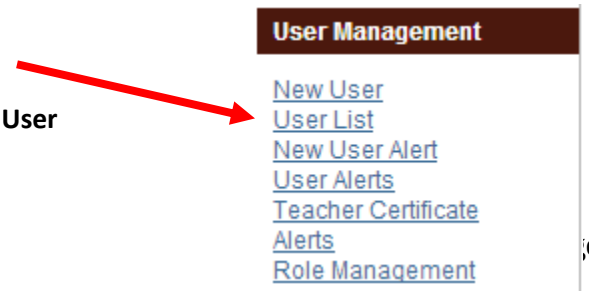
3. Users who are not assigned a role will have access to none of the navigational links until a role is assigned.
4. Users can be assigned multiple roles in the same program
    a. When two or more roles of varying permissions are assigned to a user in the same program (Data Entry person and Teacher, 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.

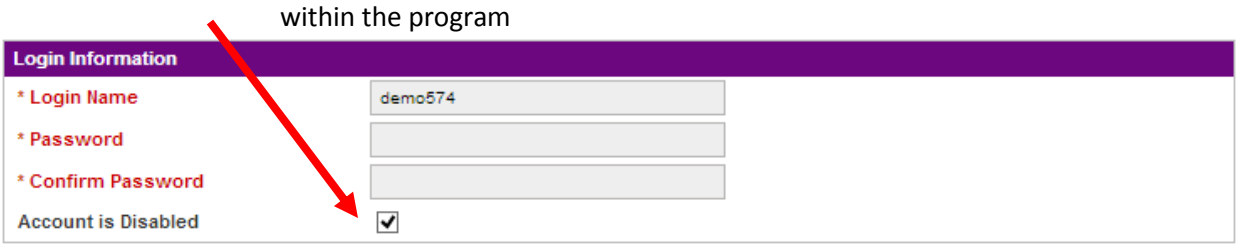
To deactivate a user:

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.

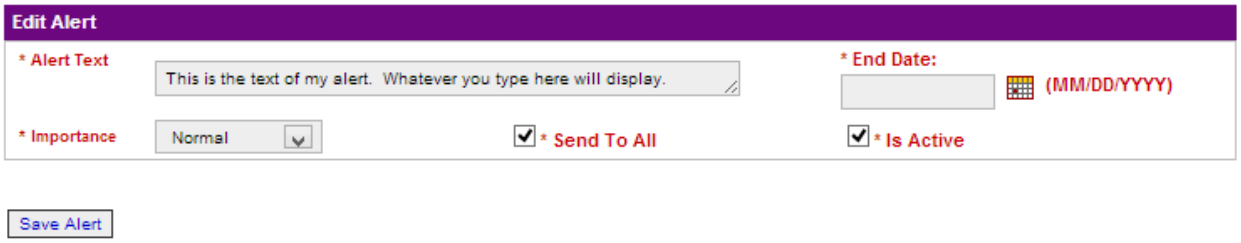
USER ALERTS

User Alerts are an internal messaging system that allows users to post important information to all users under their jurisdiction or to specific users in the system.

To create a User Alert

Select the New User Alert link from the User Management section in the left hand navigation bar.

Add text in the "Alert Text" box



Select an Expiration Date for the alert (after which the alert will no longer show on the system)

Choose the Importance Level

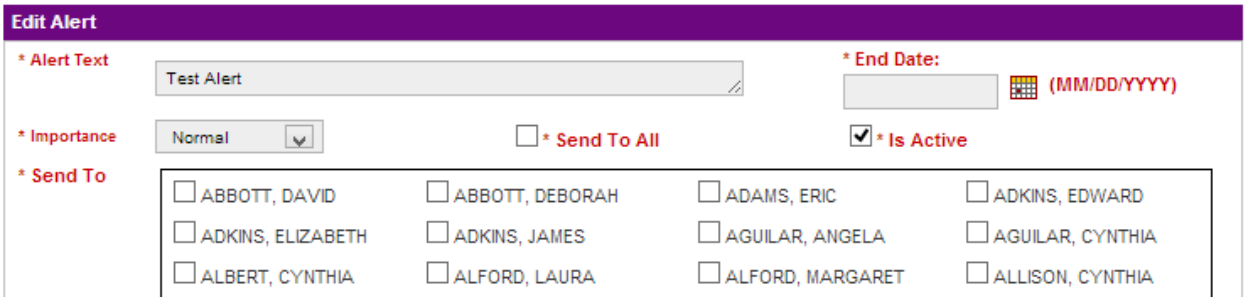
Urgent Level Alerts display in red

Normal Level Alerts display in green

Low Level Alerts display in gray

To post the alert to the home/landing page of ALL users leave the Send to All box checked

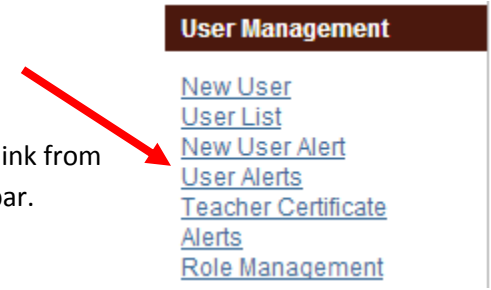
To view a list of users and send only to selected users, uncheck the Send to All box and check the specific users who should receive the alert.



To disable an alert and remove it from view, uncheck the "Is Active" checkbox.

Viewing User Alerts

To view a list of active user alerts, click on the User Alerts link from the User Management section in the left hand navigation bar.



Class Management

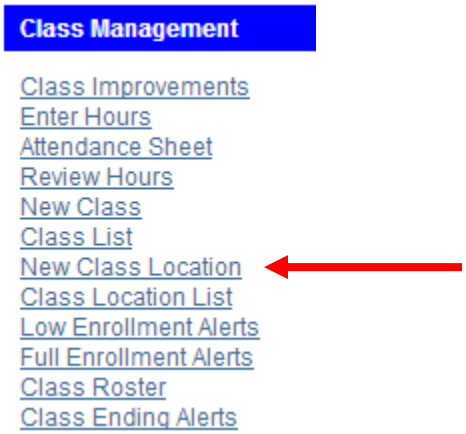
CLASS LOCATIONS

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

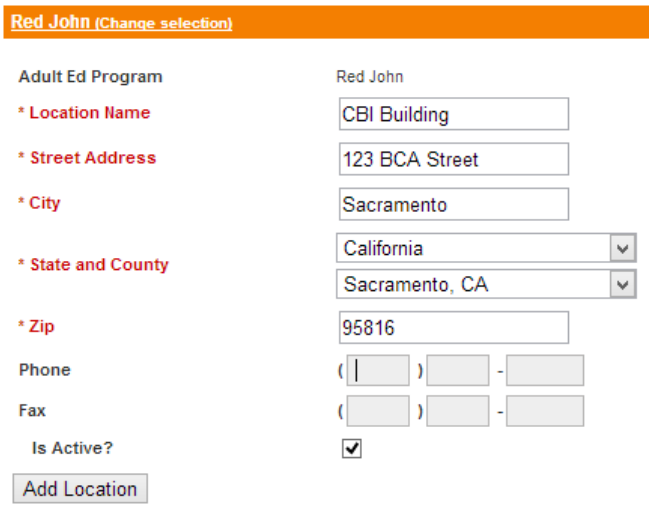
Class Locations are used to help manage programs with multiple sites or campuses. Using the Class Location feature a program can now more easily track where instruction actually occurs.

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.*

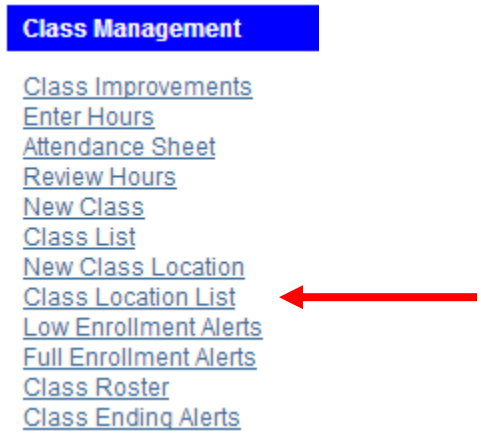
Class Locations can be edited, but it should be noted that any changes to a Class Location stored in the system will also alter historical information for all classes which had that Location designation.

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.

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

Class Location List

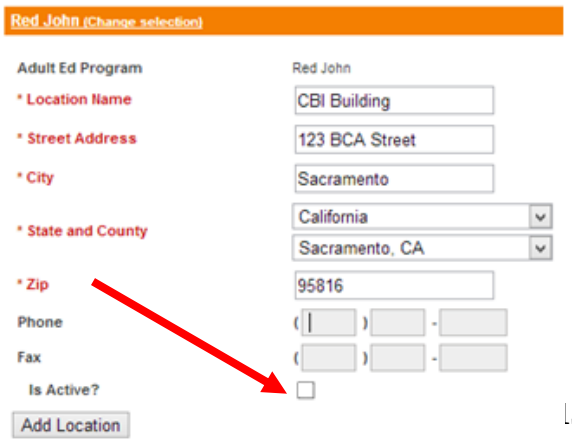
The system stores a list of entered locations which are available by clicking the Class Location List link under the Class Management Section on the left hand navigation bar.



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.*

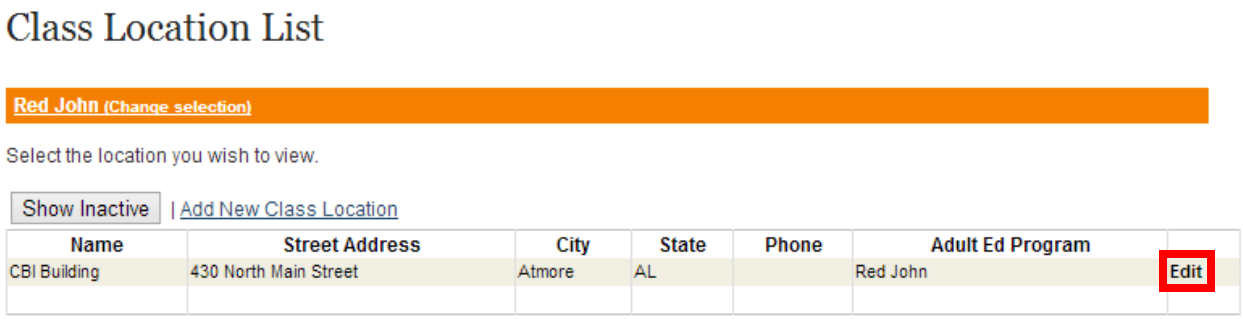
De-Activation Of Class Locations

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.

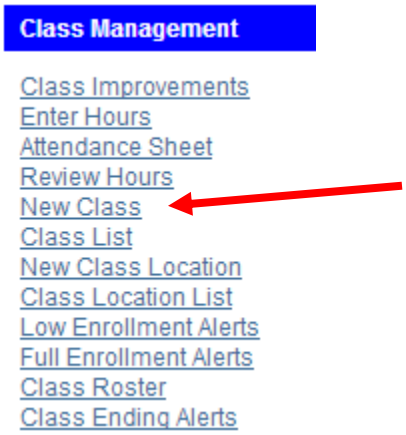
Select the Class Location with which the selected Class Location should be merged and click on "Confirm".

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.

CREATING NEW CLASSES

To create a new class, select New Class from the Class Management Bar or the Class List screen



Course ID

Course IDs are automatically created during the class creation module. Course numbers reflect

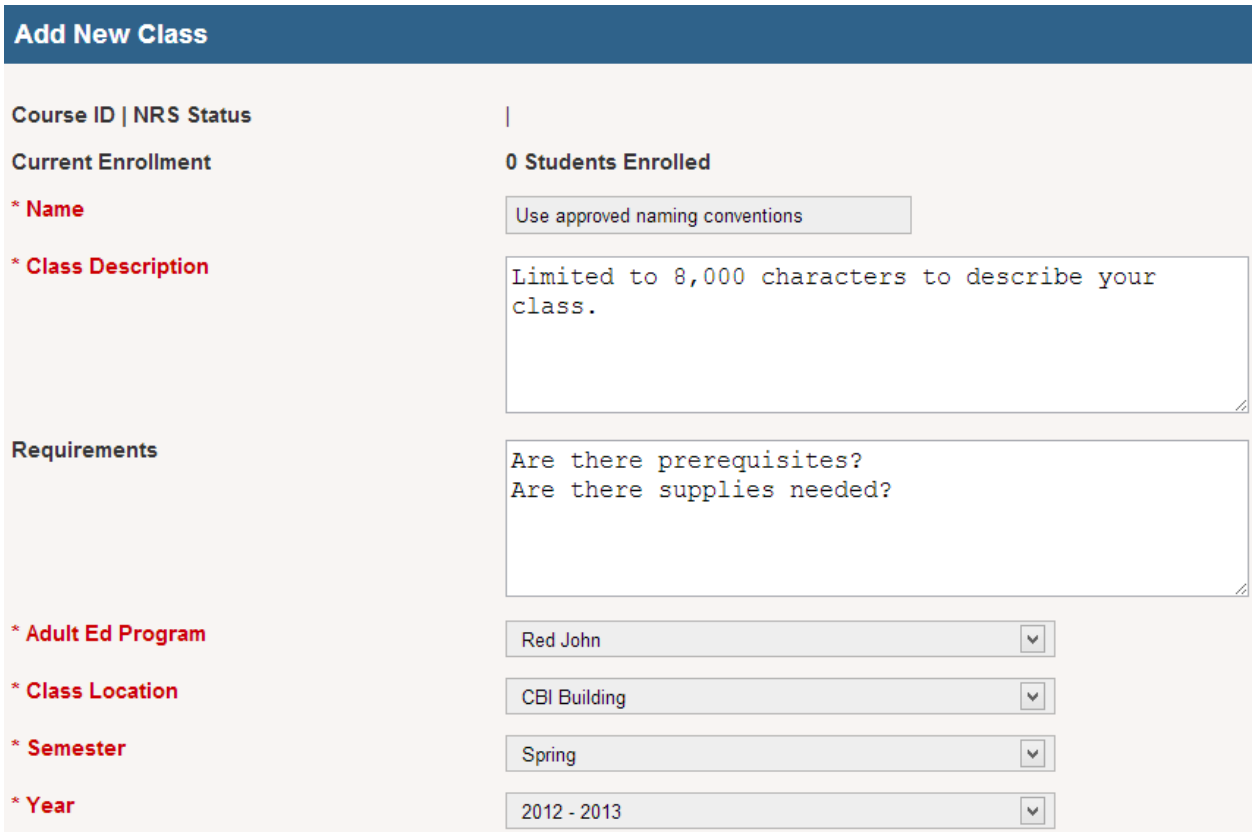
- Class Type
- Course Number
- Class Section
- Class SemesterClass Year

Two (2) additional numbers will be displayed in the Course ID. These numbers are generated by the system and are not editable by the user. They are used in communication with a forward facing student portal and for database management. For clarification these numbers are:

- Program ID
- System Generated Class Number

All information noted in **RED** on the Class Creation page must be completed in order for the class to be entered in the system. Required fields may include

- Name
- Description – Used for forward-facing student registration system/Portal
- Requirements
- Program
- Location
- Semester
- Year
- Class Type
- Size
- Teacher
- Teacher Role
- Start Date
- End date



Class Name

Establishing the name of the Class should follow state policies regarding Class Naming Conventions.

Class Description

This open-ended field allows for a description of the class to be entered. This is important for those classes that will be available for course catalogs or for release to the public so students can search for available classes. (A maximum of 8,000 characters is allowed.)

Requirements

This optional open-ended field allows for a list of requirements to attend a class to be entered. This is important for those classes that will be available for course catalogs or for release to the public so students can search for available classes. (A maximum of 8,000 characters is allowed.)

Adult Ed Program

For program level users, this field should display only the program to which he/she is assigned.

Class Location

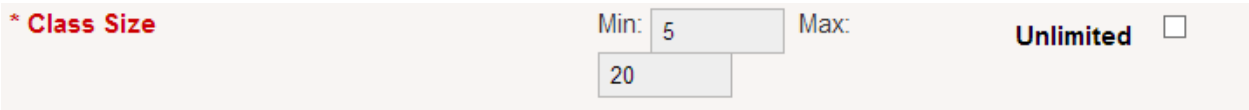
NOTE: Before a Class Location can be assigned; the Location must be created, attached to the Program and stored (see Class Location for more information)

Class Location establishes the street address for the class.

Semester
Select the most appropriate term for which the class will meet.

Year
Select the most appropriate fiscal year in which the class will meet. (As you near the end of the current fiscal year, the NEXT fiscal year will become available to plan for future classes.)

Class Size
Select the minimum and maximum number of seats available for the class.



- Minimum size is merely a notification. Classes ***will not*** be automatically closed if they do not meet the minimum. Administrators will be able to access reports that will display a list of classes that did not meet the minimum enrollment. These reports can be used for management and evaluation purposes.
- Maximum size is merely a notification. Students can still be placed in classes after the maximum size is surpassed. Administrators will be able to access reports listing classes where the maximum seating capacity is exceeded. These reports can be used for evaluation and management purposes.
- Maximum size is used primarily to manage the process of direct student signups from external portals. When a class meets the maximum, students who access the system from the Benchmark ITS student registration portal will not be allowed to enroll in those classes. (For more information about managing student placement and class rosters see the Student Class Placement section of this document.)
- Unlimited Option. Some classes may have no enrollment limitations, i.e.: Web-Based / Distance Learning. For those classes, select the "Unlimited" checkbox next to the Minimum/Maximum fields. This establishes an unlimited class size.

Class Types Selection

- Choose the most appropriate Class Type from the dropdown menu.
- Classes that are NRS tracked will change the designation of the class to "Is NRS." This designation is found at the top of the Class Creation/Editing screen next to the Course ID.
- NRS tables are generated according to the class program "type" assigned to the class
  - Example: Table 4C and 5A Distance Ed, Table 10 Correctional

Course Number
Course Number is an optional field providing additional information regarding the type of class. This field is used to create the Course ID.

Credits
Credits an optional field used to retain information regarding credits that may be assigned for completion of the class.

Section Number
Section Number is an optional field which allows the ability to differentiate between separate sections of the same class. As an example: If a program has four sections of Basic Reading Skills, this field could be used to denote sections 100.1, 100.2, 100.3 and 100.4. This field is used to create the Course ID.

Class Category
Class Category is an optional field providing additional information regarding the type of class.

Class Subcategory
Class Subcategory is an optional field providing additional information regarding the type of class.

- A Subcategory is required if a Category is selected.
- A Subcategory should not be selected if a Category is not first chosen

Teacher And Teacher Role Assignment

- Assign teacher to class by selecting from the dropdown list of available teachers
  - If the teacher assignment is not known at the time of Class creation, this section may be left blank until the teacher is determined.
    - **Classes without assigned teachers will not appear in the attendance entry module**
    - **Students cannot be placed in classes without a teacher assigned.**
- Assign the teacher role related to the class.
  - If more than one teacher should have access to the class, multiple teachers can be assigned roles related to the class, but only one teacher can be specified as the primary teacher on the Class Creation page.

NOTE: Roles can be assigned to teachers at this stage or from the user roles page.

Building Assignment
Building Assignment is an optional field providing additional information regarding the where a class is held. Building Assignment information assists in creating Day Planner Reports.

Room Assignment
Room Assignment is an optional field providing additional information regarding the where a class is held. Room Assignment information assists in creating Day Planner Reports.

Class Start And End Dates

Class Start and End Dates are used to generate the possible attendance fields in the Attendance Entry Module.

Classes can be entered with future dates to assist in program management. Classes cannot be entered with dates in previous fiscal years.

Class Start and End Dates should reflect the natural progression of the class. If a Class begins in May and will carry over into August, crossing fiscal years, the Start and End Dates should reflect that reality.

Class Fees

If your state is tracking fees that will be applied to a student record when the student is placed in the class, the fees can be entered in this optional area.

All fees entered will be automatically applied to the student's billing record at the time of his/her placement in the class.

If all fees are set at $0.00 the class is marked FREE.

For more information about managing payments and billing see the Student Billing and Fees section of this document.

Portal Information

If the class is to be displayed in an outward facing student registration portal, this checkbox should be checked. If the class should not be displayed for students to review and consider, it should be left unchecked.

If the class is to be the featured class for the program the checkbox for Featured Class should be selected.

If online payments for the class are allowed, the checkbox for Online Payments Accepted should be selected.

Class Schedule

Create a Class Schedule based on the times the class will meet.

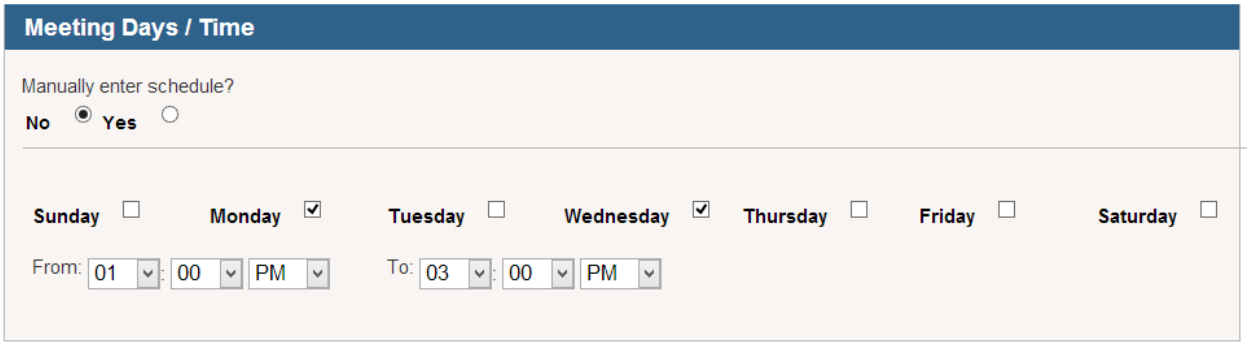
- Class Schedules should be kept as up-to-date as possible
- Classes must have at least one meeting day to be considered in the system.

Manual Class Schedule Entry allows the entry of varied meeting times in the class schedule on varied days.

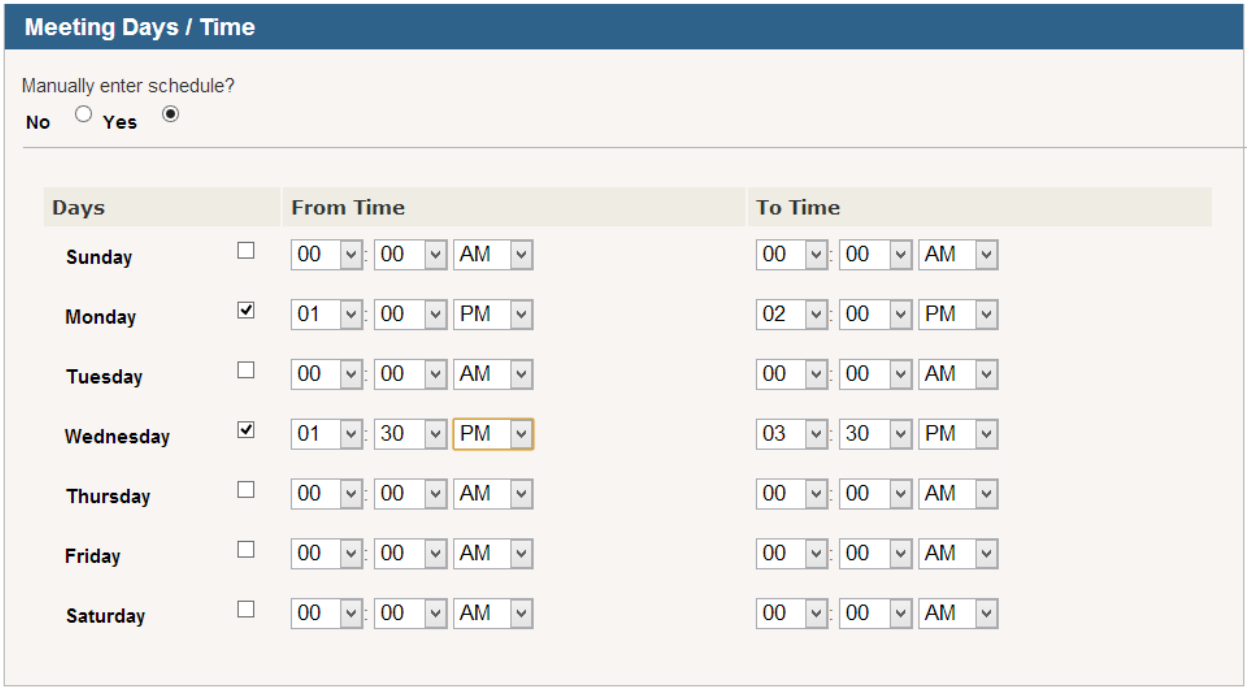
If the class meets at the same time on each day it is scheduled to exist, the non-manual entry function allows a more expedient selection of days and a time for those meetings.

EXAMPLES:

Class meets on Monday and Wednesday from 1:00 PM to 3:00 PM on both days. The non-manual method would look like the following.



If the class meets on Monday from 1:00 PM to 3:00 PM and on Wednesday from 1:30 PM to 3:30 PM, then you should use the manual method as follows.



EDITING CLASSES

Classes can be edited by selecting the Class from the Class List link (available in the left hand navigation bar).

NOTE: When Class information is edited, the changes apply to all historical references to the class. If the name is changed, for example, that name change will then reflect on the record of every student who was ever placed in that class. It is recommended, therefore, that when significant changes to class information occur, a new class should be created, the students transferred and the old class closed.

NOTE: For changes in class information to be uploaded to the portal, the entire program record must be uploaded. See Portal Uploads in this document for additional information.

Any changes made to class information will be reflected as of the date the edit is made.

CLOSING CLASSES:

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.

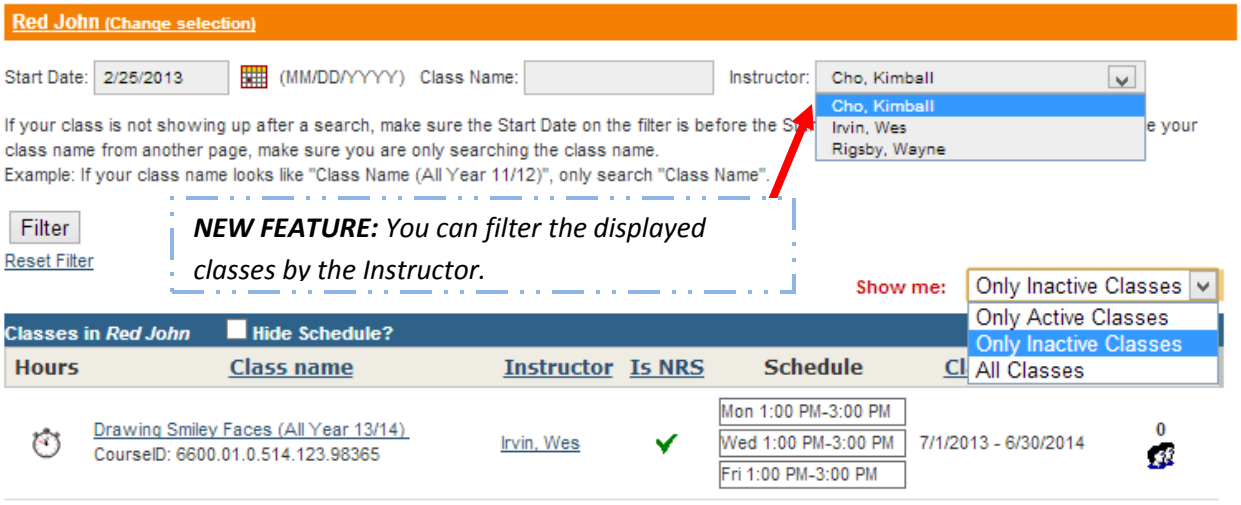
NOTE: Classes that have currently enrolled students cannot be closed. All students must be exited from the class at the time of closing.

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

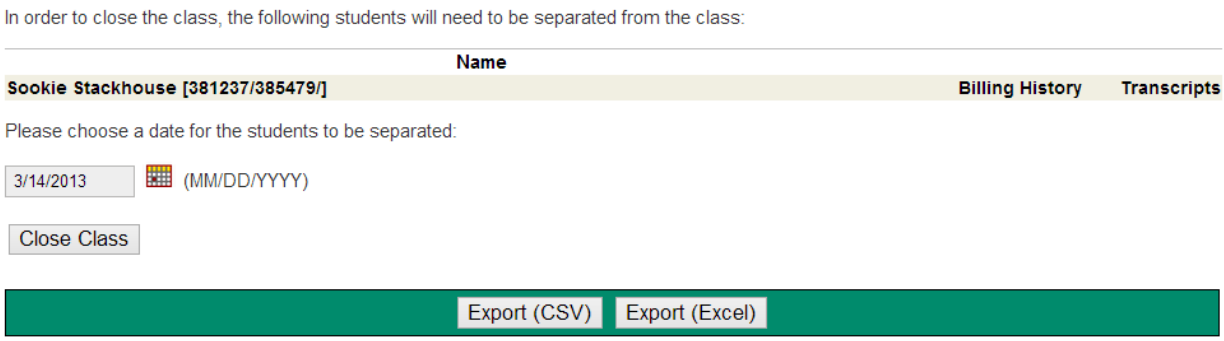
CLASS LIST



To reactivate the class

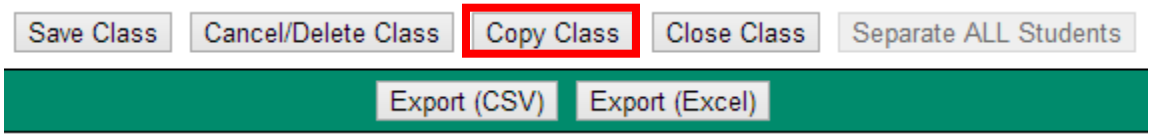
- Click on the class title and remove the check mark from “Is Closed” box
- Click Save Class at the bottom of the class page.

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. You also have the option of exporting a list of those students separated from the class in either .CSV or Excel formats.*



COPYING CLASSES

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.

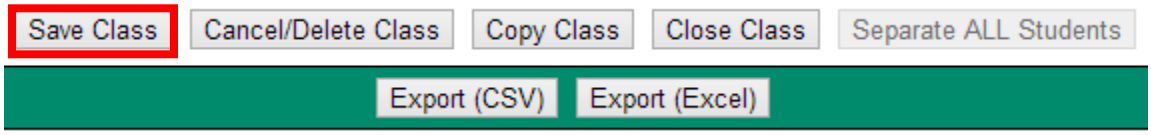


NOTE: Enrolled students will NOT be copied to the new Class. Class placement must be accomplished through the Add Class or Transfer Students features.

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

Once the information in the copied class has been updated or verified, click on Save Class to commit the changes.



CANCEL/DELETE CLASSES

The Delete Class Button in the Class Management screen completely removes the class from the historical record.

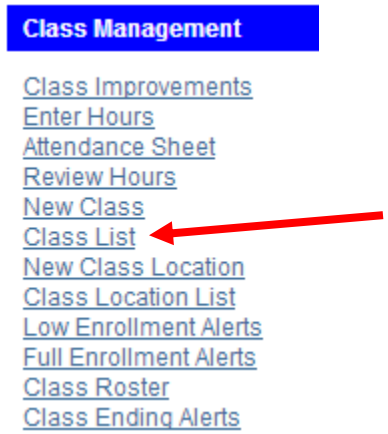
NOTE: Classes can only be Cancelled/Deleted if no attendance entries are associated.

When a class is cancelled or deleted, all students associated with the class are automatically removed from the class roll.

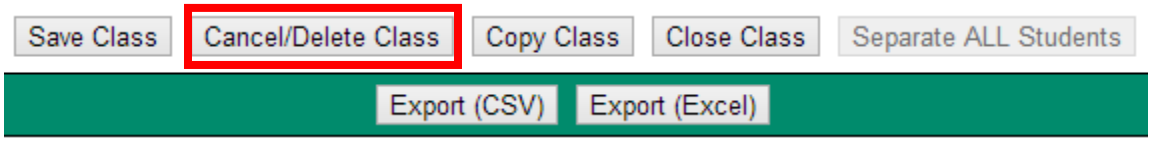
If fees for the class have been applied, the Cancel/Delete Class function will provide a list of all students and the associated fees.

NOTE: Fees must be removed or refunded on a student by student basis. There will be no mass removal of applied fees. For more information see the [Billing and Fees](#) section of this document.

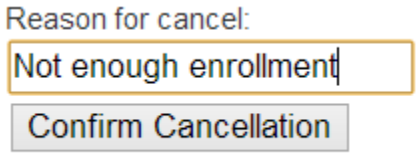
To cancel / delete a class, select Class List from the Class Management Bar or the Class List screen



Scroll to the bottom of the screen and click the "Cancel / Delete" button.

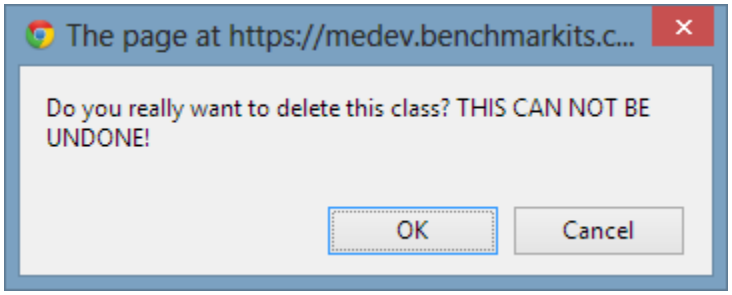


You will be required to give a reason for the cancellation.



Once entered, click on "Confirm Cancellation".

You will be reminded that this CANNOT BE UNDONE. Click "OK" to continue.



You will see a confirmation that the class was deleted along with a list of students that were separated at the cancellation. There is also a reminder to navigate to that student's billing and remove any charges.

Class was deleted!

Please verify the followng student's billing information. They were in the class when it was cancelled.

Name
Sookie Stackhouse [381237/385479/-1]

If Attendance has been entered for the class, you will see an error stating that the class CANNOT be deleted because of attendance. Your only option is to CLOSE the class.

The following errors occurred:

Class cannot be deleted!

Error while deleting Class : Unable to cancel/delete class as the class has attendance

Reason for cancel:

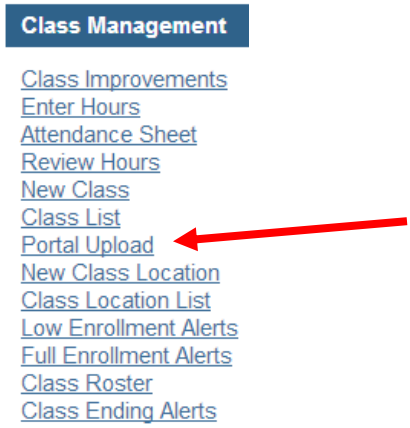
Not enough enrollment

Confirm Cancellation

Export (CSV) Export (Excel)

PORTAL UPLOADS

Managing class entries on the Web Portal is accessed by selecting the "Portal Upload" link from the Class Management section of the left hand navigation menu.



This link generates a list of all classes slated to be uploaded to the Web Portal including Class Name, Course ID, Class Instructor, Class Schedule and Class Dates. The list includes all classes flagged "Is Portal" in the class information/creation screen.

Note: If any information is incomplete, missing, incorrect or in need of editing, please make the changes prior to continuing with the upload process.

To push an upload to the portal, select the "Upload to Portal" button at the bottom of the list.

If there are data consistency errors, ADVANSYS will return an error message and the issues must be resolved prior to attempting the upload process again.

Changes To Class Data

Due to the way the Portal syncs with ADVANSYS any changes to class data including Class Name, Class Schedule, Class Type, Class Designation, etc. will require that the entire file for all classes be uploaded to process the change on the portal.

NOTE: Any changes made to class information on the portal ARE NOT synced with ADVANSYS. For Class Information to be changed it must be changed on ADVANSYS. If you make a change to a class on the Portal and do not make the change on ADVANSYS if you re-upload the class file, the changes made on the Portal will be overwritten.

Syncing Class Enrollments

ADVANSYS syncs online student registrations with internal class placements to maintain a consistent count across both platforms. If a student registers for a class online an allocation is automatically made toward fulfilling the class maximum on ADVANSYS. By the same token if a student is placed in a class on ADVANSYS, that placement syncs with the Portal automatically, thereby reducing the number of available seats on the Portal for that class.

The sync process occurs in real time on a transaction by transaction basis. It should not typically be necessary to do so, but the system provides the ability to manually re-sync the seat counts between the Portal and ADVANSYS.

Choose the "Sync Slot Count" button at the bottom to perform the process. Sync Slot Count refreshes both the Portal Count and the ADVANSYS allocation to verify the counts.

For more information about seat counts and student registration/placement, see the Class Placement section of this document under the Student Management section.

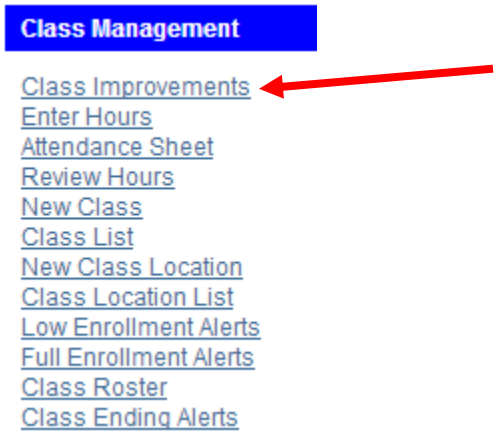
CLASS IMPROVEMENTS

Class Improvements is a management report that provides assessment information on every student on a class roll.

The report displays the following information:

- Student Name
- Student's Current Functioning Level
- Score(s) (if any) needed to complete an EFL

Select Class Improvements from the Class Management Bar or the Class List screen.



You will see the following.

Drawing Smiley Faces Fall [90547]

Name	Current Functioning Level	Scores Needed to Complete Level
Patrick Jane	ABE Beginning Literacy	Life & Work Reading - 201

REVIEW HOURS

Review Hours is a management report that provides at-a-glance information about Class Attendance and Approvals.

The report is created at the individual class level and can be filtered by date range.

Class Management

- Class Improvements
- Enter Hours
- Attendance Sheet
- Review Hours
- New Class
- Class List
- New Class Location
- Class Location List
- Low Enrollment Alerts
- Full Enrollment Alerts
- Class Roster
- Class Ending Alerts

Red John > Drawing Smiley Faces Fall (Change selection)

From: 7/1/2012 (MM/DD/YYYY) To: 12/31/2012 (MM/DD/YYYY) ◉ In Attendance ○ No Attendance Filter

Attendance Hours for *Drawing Smiley Faces Fall (Non-NRS Reported Class)*

Meeting Date	Meeting Hours	Approved	Student Attendance				
			Name	Hours Attended	NRS Hours	Non-NRS Hours	Approved
12/17/2012	2.00	✓	Jane, Patrick	2.00	0.00	2.00	✓
12/19/2012	2.00	✓	Name	Hours Attended	NRS Hours	Non-NRS Hours	Approved
			Jane, Patrick	2.00	0.00	2.00	✓

ATTENDANCE ALERTS

Navigate to “Attendance Alerts” in Student Management.

Select the Program

The generated report will show Students who have not had any attendance for 90+ days.

NRS Registered Students missing Attendance Hours

The following students have not had attendance hours entered for the last **90** or more calendar days.

Name	Last attendance date [days ago]	Enrollment Date	Contact phone(s)
Patrick Jane	11/7/2012 [111]	1/9/2012	h: (401) 523 - 4588 w: Not Specified

TESTING ALERTS

Navigate to “Testing Alerts” in Student Management.

Select the Program

The generated report will show Students who have not had any 60+ hours of Attendance without a test.

Students missing Test Scores

The following students have accumulated **60** or more class hours without a test score being entered:

Name	Last Test	Total Hours since Last Test	NRS Hours since Last Test	Gain	Enter Scores
Patrick Jane	7/26/2012	75.50	75.50	Completion not earned	

ENROLLMENT ALERTS

Navigate to “Enrollment Alerts” in Student Management.

The generated report will show Students who have an active enrollment but are not placed in any class.

The report can also be filtered by LAST NAME or SSN.

Last Name: SSN/EIN:

Sort By: First name Sort Direction: Ascending Filter

Enrolled students not placed in any class (993 Students)

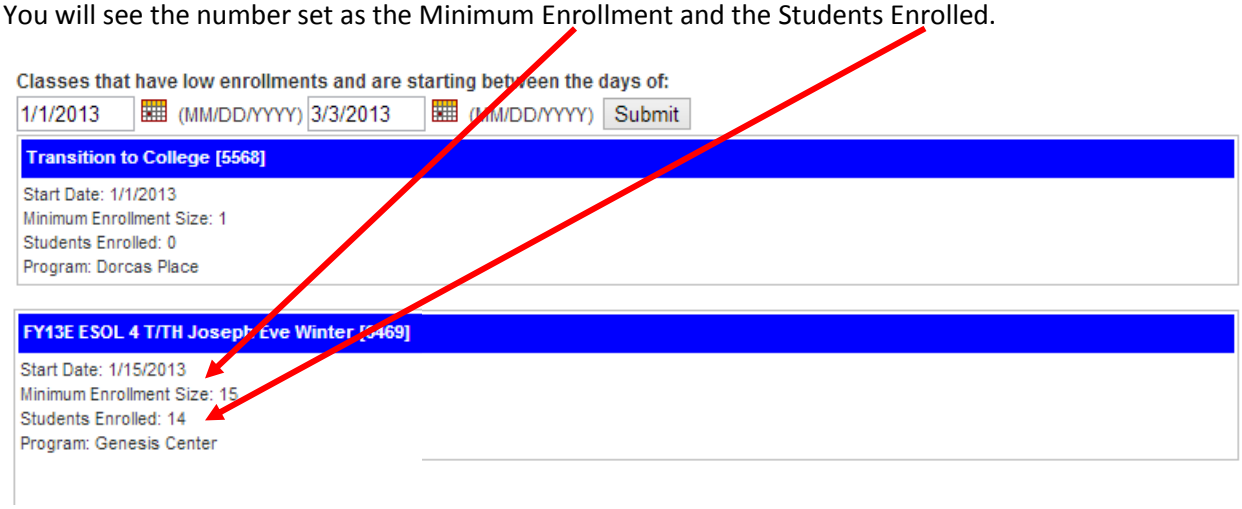
Student / SSN / EIN	Contact phone(s)	Entered By User / On Date	Last Attendance
Patrick Jane ssn: 123-45-6789	h: (401) 499 - 1088 w: Not Specified	Wes Irvin Genesis Center 11/19/2012 12:28:57 PM	75 days ago

LOW ENROLLMENT ALERTS

Navigate to “Low Enrollment Alerts” in Class Management.

Select the date range to search.

You will see the number set as the Minimum Enrollment and the Students Enrolled.



FULL ENROLLMENT ALERTS

Navigate to “Full Enrollment Alerts” in Class Management.

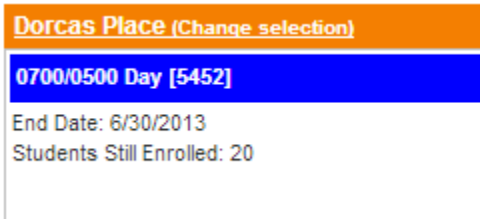
Just as with the Minimum Enrollment, you will see the number set as the Minimum Enrollment and the Students Enrolled.

CLASS ENDING ALERTS

Navigate to “Class Ending Alerts” in Class Management.

Select the Program

This will show you the End Date for the class, the number of students enrolled and a listing of the enrolled students.



STUDENT MANAGEMENT

TERMS TO REMEMBER FOR NEW STUDENT ENTRY PROCESS

ENROLLMENT	Enrollment is the first step in the student entry process. Students are ENROLLED in a program. To Enroll a student in a program, an Enrollment Type and Enrollment Date must be selected. A student may have one or more TYPES of enrollments, but must have at least one enrollment type. Students who are being tracked for NRS purposes MUST have the Enrollment Type NRS Registration.
REGISTRATION	Students who are Enrolled with an Enrollment Type of NRS Registration will be prompted to enter NRS Registration information, including the CONTACT TYPE (ABE/ASE or ESL) and NRS Registration Date. This may be a different date than the *Enrollment Date.*
PLACEMENT	Students are PLACED in Classes. Students may be placed in one class or multiple classes. Class placement can be managed during the entire term of the student's Enrollment by adding classes, removing students from classes, and/or transferring students between classes.

Because of the impact of student duplication on the Federal Tables, ADVANSYS has been designed as a Student Centric System. The individual student may have multiple Program Enrollments, Enrollment Type Registrations and Class Placements. However, the student is entered ONCE in the system and the Enrollments, Registrations and Placements spur out from it.

STUDENT SEARCH

The Student Search box has been designed to aid efficiency in searching for students in the system. Search by SSN, by all or part of the student's name, by date of birth, by EIN or by State ID (if applicable) or search by any combination of criteria.

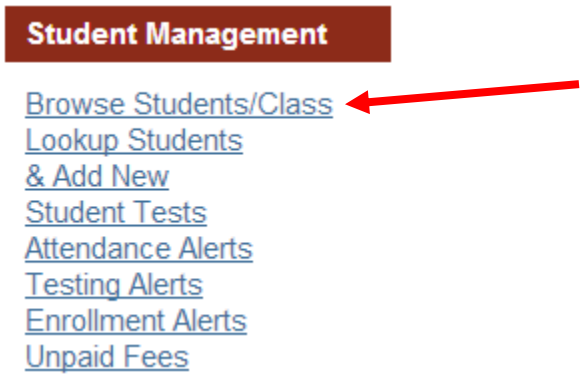
BEST PRACTICE: To avoid duplication of students we suggest always searching by a portion of the last name and the birth date. A student may spell their last name differently ("Jones or Johnes" for instance) but if the search criteria of "Jo" in the last name box is combined with the date of birth, chances are great that the student will be found and a duplicate avoided.

If the student ***IS NOT FOUND*** in the system, use the "click here" link above the search box to create a new student. See instructions for "Entering New Student" below.

If the student ***IS FOUND*** in the system, see instructions for "Working with Existing Student" below.

Browsing for Students

To view a list of students in a particular class, select the Browse Students link from the Student Management section of the left hand navigation menu.



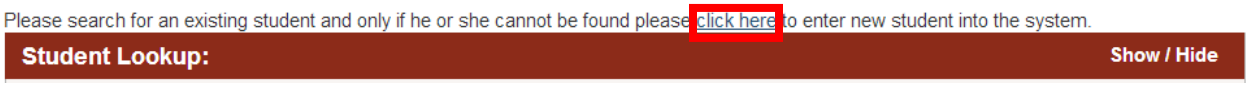
Choose a class to view the list of students currently on the class roll.

This same information can be accessed by choosing the students icon from the Class List screen.

ENTERING NEW STUDENT

To enter a new student:

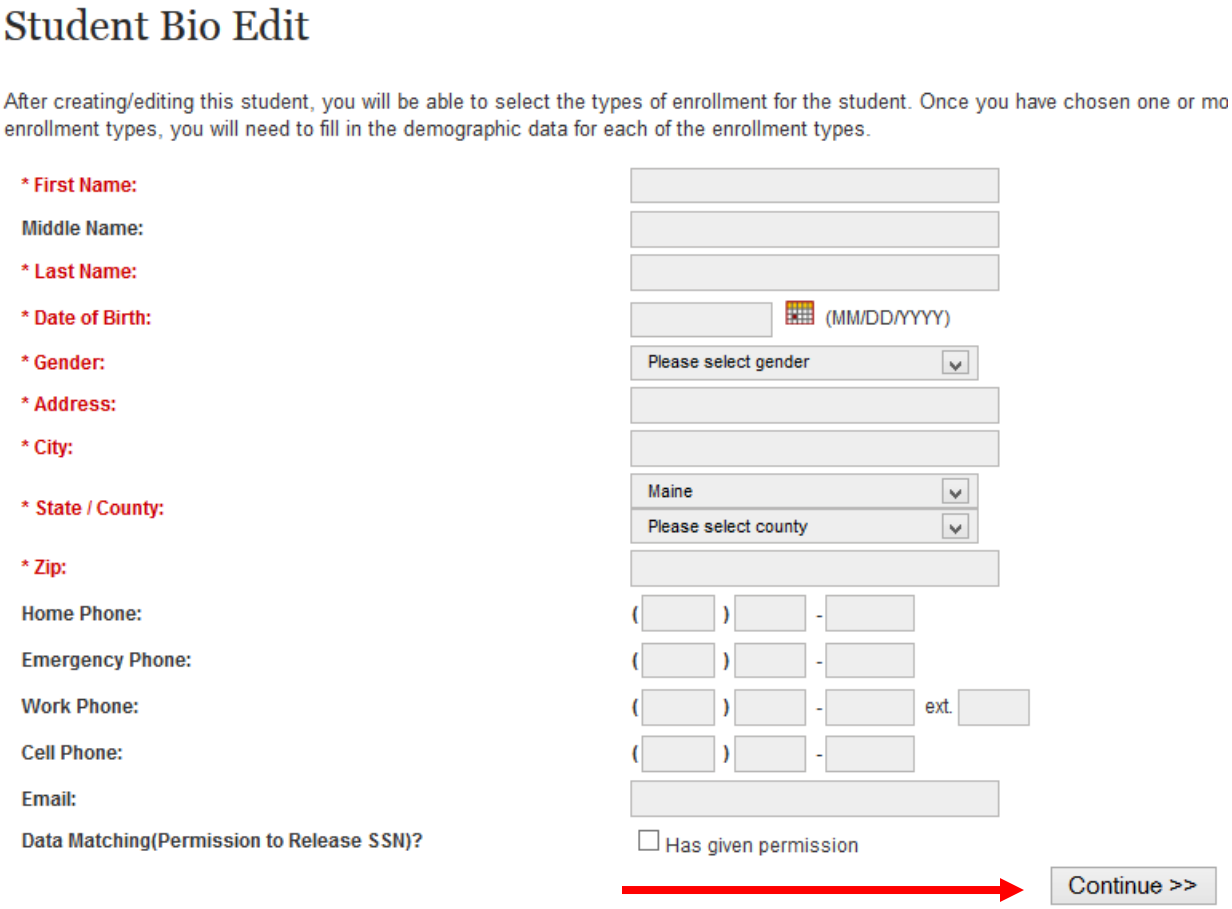
Click the “click here” link at the top of the Student Lookup.



Student Bio

First complete the basic biographic information required for all students regardless of Enrollment Type (see illustration below). This creates the initial student record.

NOTE: All fields in red are mandatory and must be completed prior to continuing with the student enrollment.



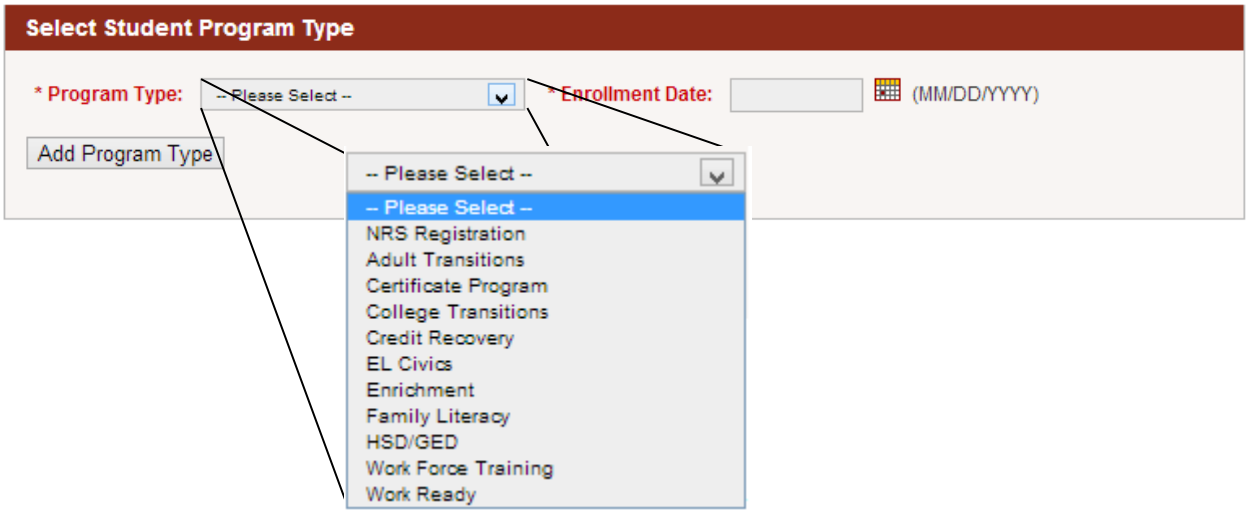
Once the mandatory fields are complete, click the Continue Button to advance to Program Enrollment

Student Enrollment

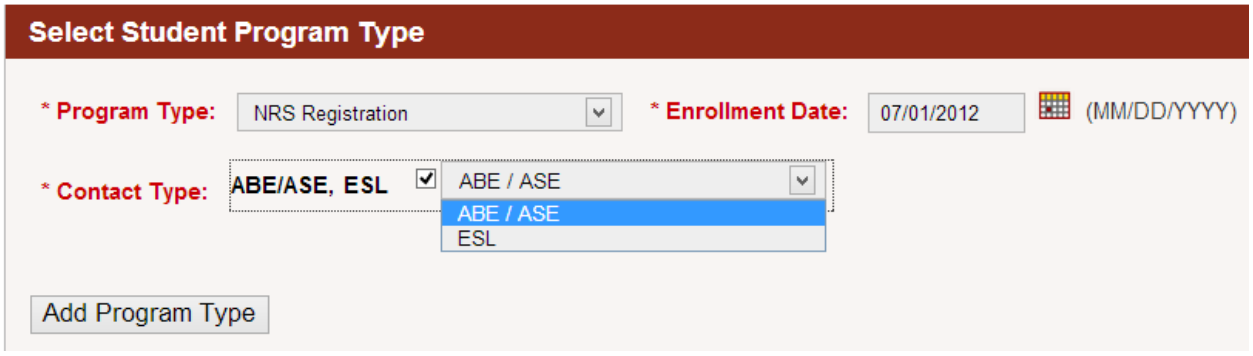
Choose "Click Here" to create Active Enrollment(s) for the student in the program (see illustration below).

a. Students can have multiple Enrollment Types within the same program.
b. Each Enrollment Type will have classes associated with it (as determined during Class Create/Edit Module)
c. If a student has one Enrollment Type assigned, he/she will have access to all classes in that program tied to that Enrollment Type.
d. Students CANNOT be simultaneously enrolled in the same enrollment type in the same Program multiple times.
e. Students CANNOT have two of the same Enrollment Types currently active.
f. Multiple Enrollment Types can be added to the student record prior to continuing.
g. NOTE: Students who are to be NRS tracked MUST HAVE NRS Registration Entered as an Enrollment Type

There may be a number of available Enrollment Types. The Enrollment Type selection is customized to meet state-specific needs.



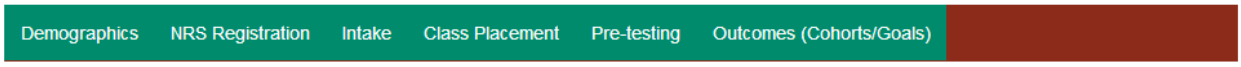
If NRS Registration is selected, the system will generate a prompt for Registration Date and Contact Type.



- Contact Type is established as ABE/ASE or ESL. Since available assessment batteries are determined by Contact Type, this cannot be changed once the student enrollment is completed and approved or once assessments are entered for the student.
- Registration Date is the date the student entered the NRS program. This date will be used to determine entry dates for class placement and available testing dates.
- Once the Enrollment Types are chosen continue to Demographic Data

Student Demographic Data

Once Enrollment is entered, the system will generate an at-a-glance status bar showing the remaining steps in completing the student entry process. As each is completed, the status bar will change color. This allows users to quickly see what information remains to complete the student entry process.



Depending on the Enrollment Types selected of demographic data designed to meet the needs of those specific Enrollment types will be collected. Among the data that may be collected are:

- Status and Needs Data
- Employment Data
- Living Area
- Ethnicity
- Disability Statuses
- Educational Background Data

For NRS Registrations the demographic fields for Employment Status and Last Grade Attended are critical to the automatic cohort outcome measures applied to the student record.

- Students who have an Employment Status of “Unemployed” will have the automatic cohort measure of Obtain Employment
- Students who have an Employment Status of “Employed” (either Full-Time or Part-Time) will have the automatic cohort measure of Retain Employment
- Students who have an Employment Status of “Not In Labor Force” will have no employment-related automatic cohort measure
- Students who have a Last Grade Completed Status of “High School Credential or Alternate Credential” or higher (in either US or Non-US school) will have an automatic cohort measure of Enter Postsecondary Training or Education

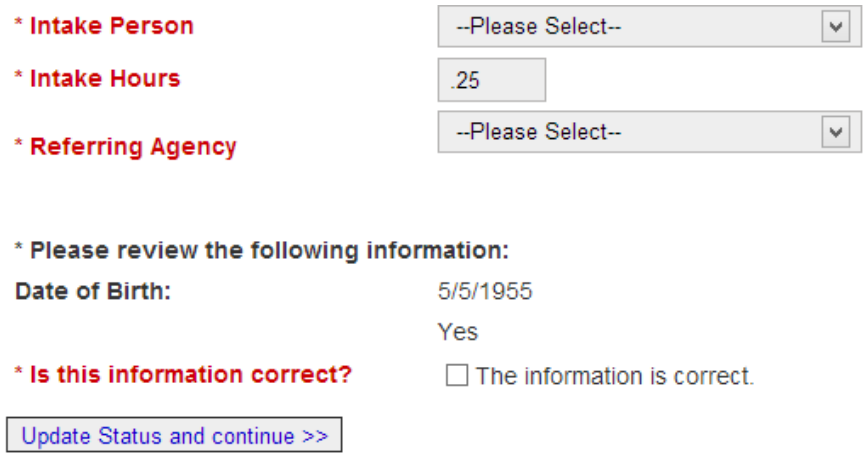
NOTE: Approved Employment and Last Grade Completed statuses are locked for the fiscal year for the student and must be reset at the beginning of each new fiscal for students who continue in instruction.

Some Enrollment Types may require no additional data collection; others may require an extensive list of data. All fields on the Enrollment Data page are required.

Student Intake

Set Intake Person, Intake Hours, and Referring Agency for the student

Confirm Birth date and Data Matching Agreement



Continue to Class Placement

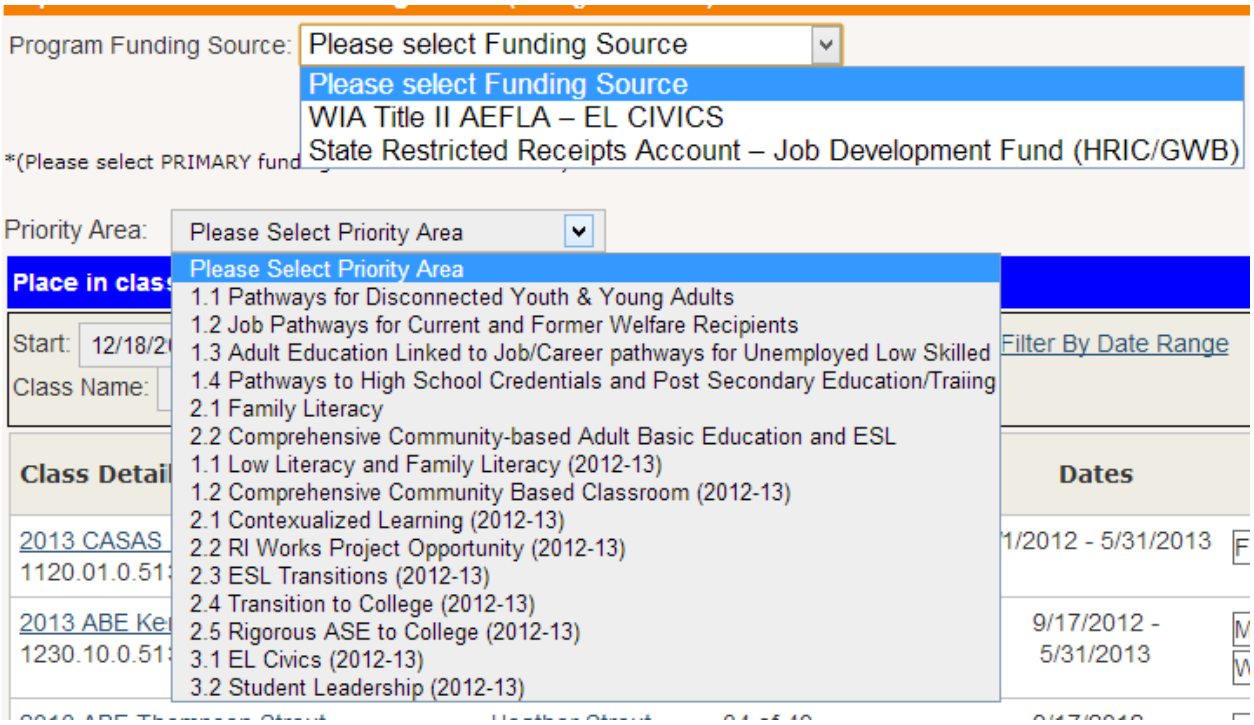
Student Class Placement

Place Students into the appropriate class(es) by checking the boxes in the right hand column of the Class List. (This information is also available in the Class Placement section of this document).

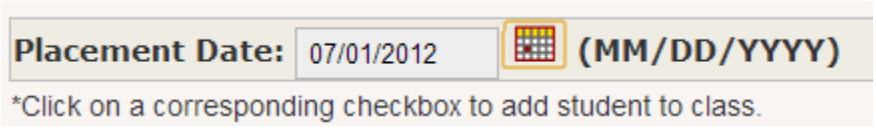
To place a student in a class or classes

- (Optional)For those systems which track Funding Source, select the funding source for the student's class placement. All systems do not have this option.

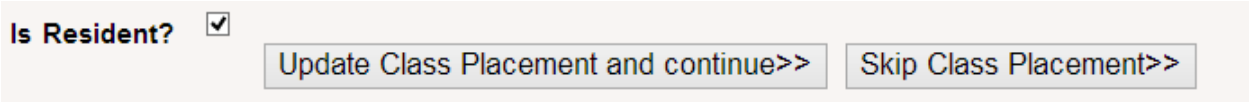
NOTE: If the appropriate funding source is not included in the dropdown, contact the state office to request changes.



- Set the Class Placement Date by editing the Class Placement Date field. ***This date establishes the first date for which a student may have attendance hours entered for a class.***



- (Optional) For those systems which implemented the Billing and Fees module, determine if the student should be charged resident or non-resident fee rates for the class by selecting or de-selecting the "is resident" checkbox.



Class Enrollment Info And Alerts

The Class List in the Student Class Placement Screen contains information related to the class size and maximum enrollments. Classes that have reached the capacity set during the class creation process are marked as FULL.

Class Details	Instructor	Students Enrolled	Dates	Schedule	Add*
2013 CASAS Intake 1120.01.0.513.244.6117	Leah Caron	20 of 500	9/1/2012 - 5/31/2013	Fri 9:00 AM-11:00 AM	☐
2013 ABE Kennedy Jones 1230.10.0.513.244.6197	Alice Jones	34 of 10 (FULL)	9/17/2012 - 5/31/2013	Mon 8:30 AM-11:30 AM Wed 8:30 AM-11:30 AM	☐

This designation does not preclude the entry of additional students into the class; it is merely an alert/warning that the established class maximum has been exceeded.

Allocating Online Registrations

For those systems utilizing an external or student-facing registration portal, additional information may be available in the Class List in the Student Class Placement Screen.

When a student registers for a class using an external means, such as a student registration portal, ADVANSYS is notified that a registration exists but the demographic data for that student is not collected or passed to the ADVANSYS system.

To manage the class enrollments, ADVANSYS will allocate a seat from the maximum number for that online registration. Included in the information regarding the number of available slots versus the maximum number will be a message regarding allocation.

EXAMPLE:

3 (1 allocated) of 20
Allocated Slots were registered
on portal, but not assigned
to student

The message above indicates that there are 20 available slots/seats for the class and that three are currently taken. One of the three taken seats is reserved by an online registration.

Registering Allocated Students

When a student who registered online is entered into ADVANSYS and placed in the class, his record should be reconciled with the allocation created.

If the student registered online, select the **Use Allocated Slot** checkbox prior to submission.

This feature will reduce the number of allocated slots in the class information message by one but will not add an entry to the portal sync. This helps maintain an accurate count between the portal and ADVANSYS.

If the student is NOT an online registration, leave the Use Allocated Slot checkbox unselected. When the student is placed in the class, this process will reduce the available slots on the Class Placement Page for that class by one and will also notify the portal that the number of available slots for online registration has been decreased by one.

See the example below for how the Allocated Slot selection will impact ADVANSYS and the Portal.

	Original Situation: Class has 20 seats. Two students registered in person, one registered online	**Scenario One:** Registrant is entered; Use Allocated Slot checkbox is selected.	**Scenario Two:** Registrant is entered; Use Allocated Slot checkbox is NOT selected.
ADVANSYS display	3 (1 allocated) of 20 **Allocated Slots were registered on portal, but not assigned to student**	3 of 20	4 (1 allocated) of 20 **Allocated Slots were registered on portal, but not assigned to student**
Portal display	Seats Available: 17 of 20	Seats Available: 17 of 20	Seats Available: 16 of 20

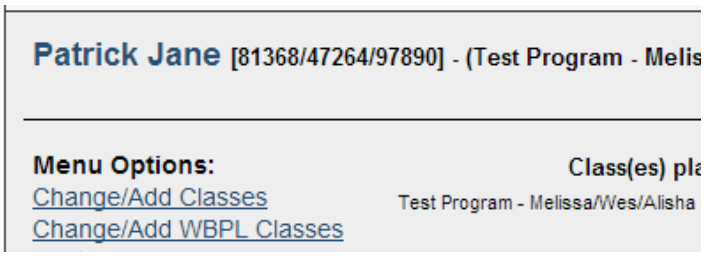
In Scenario One, the Use Allocated Slot checkbox was selected. This removed the allocation and left the number of available slots on both the Portal and ADVANSYS at 17 for the class.

In Scenario Two, the Use Allocated Slot checkbox was NOT selected. This left the allocation from the online registration intact and reduced the number of available seats on both ADVANSYS and the Portal to 16.

If a registrant is being entered in ADVANSYS who registered online, the Use Allocated Slot checkbox should always be selected.

NOTE: Class Placement can be skipped and later accessed by selecting the Change/Add Classes Link in the Student Snapshot box

Class Placement can be modified at any time during the student's active registration by selecting the Change/Add Classes link and adding to or removing from classes.



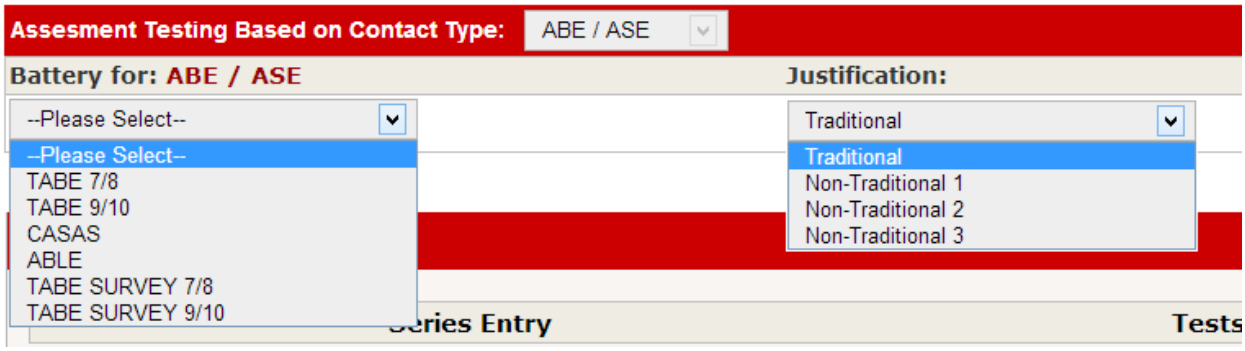
Students may also be removed from class rolls during the Attendance Entry process.

NOTE: When a student is removed from a Class, a prompt will request the entry of any related Transcript information related to that class.

Once Classes have been selected or if the Class Placement process is to be bypassed, select the appropriate button at the bottom of the screen and advance to Student Assessment Entry

STUDENT ASSESSMENT

In the "Assessment Testing Based on Contact Type" menu choose from the available test batteries which are based on the Contact Type during the Student Registration



After selecting the appropriate test battery, available tests will appear for entry.

CASAS Appraisal Score Entry

NOTE: For CASAS test batteries, the entry of at least one Appraisal Score is required to proceed to the test entry module

- Appraisal Scores are unique to each student. Each individual Appraisal can be entered only one time per student and will persist for the entirety of his/her participation in the Adult Education System.
- Once the Appraisal Scores are entered, proceed to enter a new battery by selecting the Enter Pre-Tests Link in the Appraisal block.
- NOTE: Appraisal scores do not automatically determine what CASAS test batteries should be used. Appraisal scores are suggestions, not mandates.

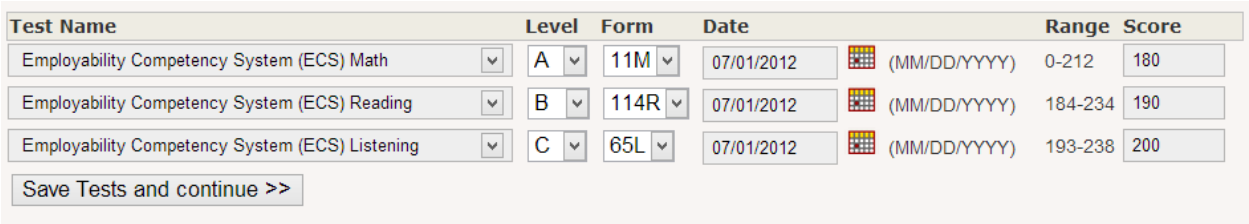
Traditional And Non-Traditional Justification

Justification allows the test batteries to be limited to fewer tests than the battery traditionally requires. Justification is used so the system 'knows' how many tests will be used to calculate the OVERALL EFL. The overall EFL is based on the lowest level of the tests with a battery.

- Traditional: Overall EFL is calculated based on the lowest of three subject area scores,
- Non-Traditional 1: Overall EFL is calculated based on one subject area score,
- Non-Traditional 2: Overall EFL is calculated two subject area scores.

From the "ASSESSMENT TEST REPORTING" box

- Choose the appropriate individual test
- Enter the actual Test Date and Score.
- Note that when Test Name is selected the screen will refresh as the system configures score range, form and series for each test.
- The scores for each test must fall within the range.



Test Name	Level	Form	Date		Range	Score
Employability Competency System (ECS) Math	A	11M	07/01/2012	(MM/DD/YYYY)	0-212	180
Employability Competency System (ECS) Reading	B	114R	07/01/2012	(MM/DD/YYYY)	184-234	190
Employability Competency System (ECS) Listening	C	65L	07/01/2012	(MM/DD/YYYY)	193-238	200

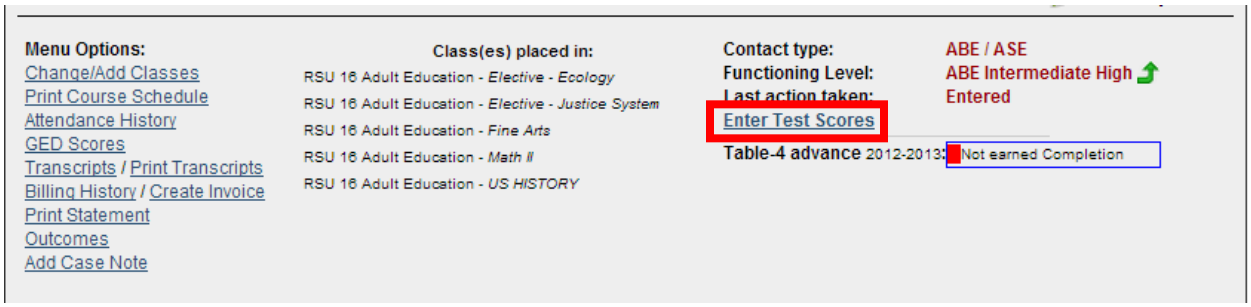
Save Tests and continue >>

When the test scores are correctly entered select "**Save Tests and Continue**"

Entering A Post-Test

In order to complete the Battery "cycle", a post-test must be entered in the system. Once entered, this will recalculate the EFL of the student per the leveling model.

From the Student Snap-Shot, click on "Enter Test Scores".



When the screen refreshes, you will see the student's progress in the current battery.

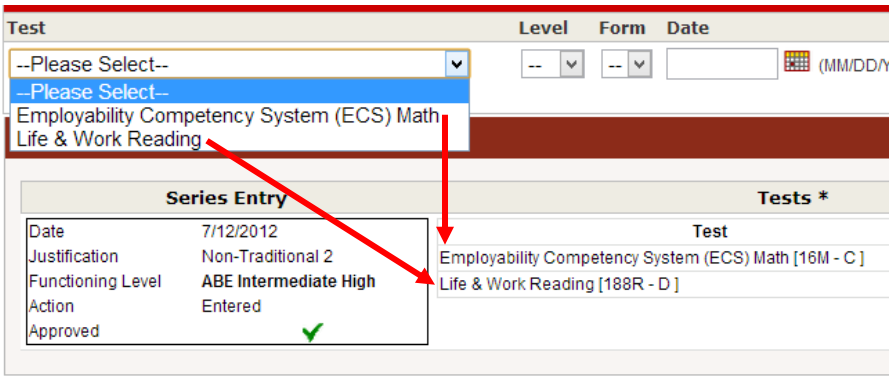
Contact Type: **ABE / ASE**
Current Status: **Pre-tested only** (enter the Post Tests below)
Current Battery: **CASAS**
Current Justification: **Non-Traditional 2**

Once the pre-test has been established, post-tests can be entered in any order. For example if a student enters as Non-Traditional 2 and his overall EFL is established by the lowest of the two score levels, the program may choose to post-test in only one subject area.

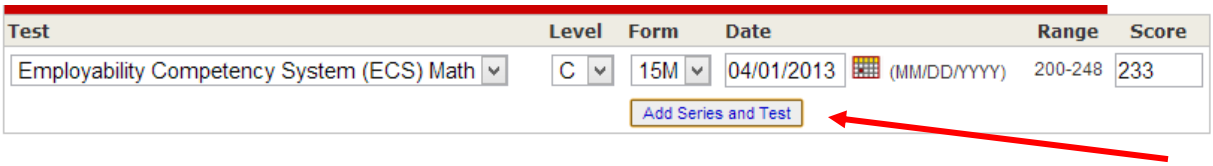
NOTE: Tests must be entered and approved in a logical fashion. Once a test date has been entered and approved, additional tests cannot be entered on that date.

In the test entry section, enter the required information in the appropriate boxes.

You will notice that the available tests in the "Test" drop-down will be limited to the pre-tests that were entered.



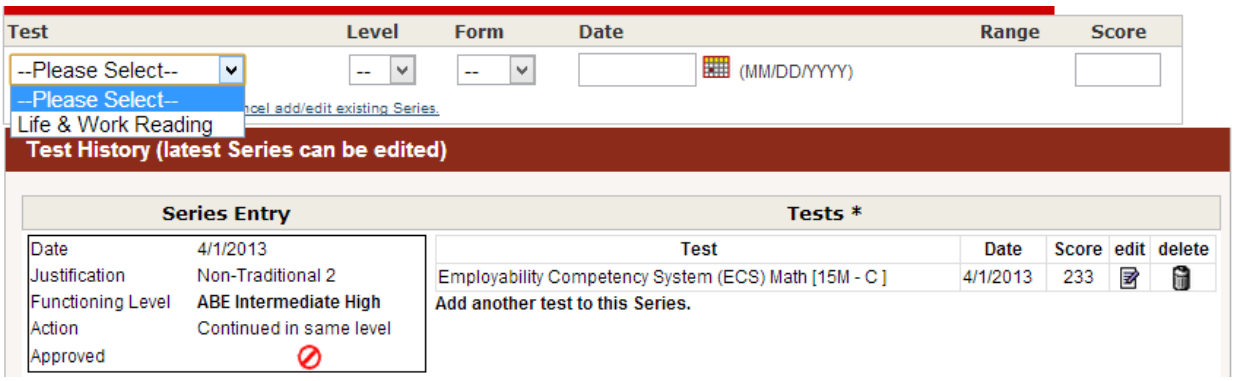
Select the post-test you wish to enter.



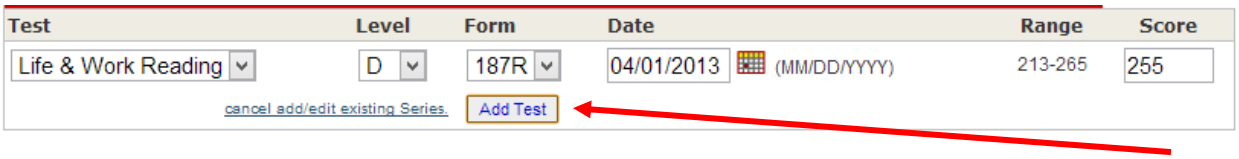
Once you select the post-test, level, form, date and score; click on the "Add Series and Test" button.

The screen will refresh and you will see a confirmation message.

Scroll back down to the test entry section to enter the next post-test. (***REMEMBER: If you are entering more than one test on a select date, ALL the post-tests for that date must be entered before they are approved. Failure to do so will prevent you from entering additional post-tests on that date.***)



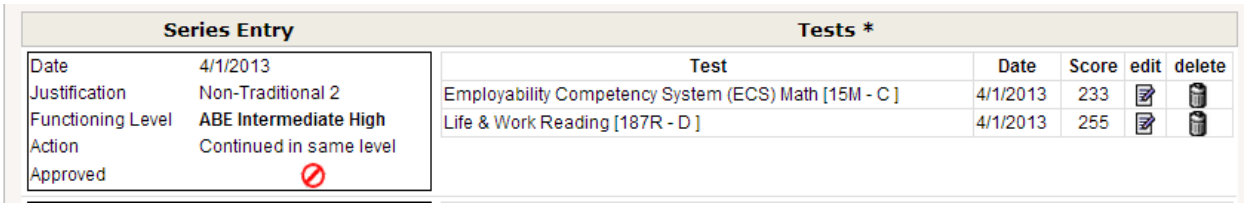
You will notice now that the only test that is available is/are the test(s) that have not been entered. Select the test and enter the required information as before.



Once you have entered the required information (test, level, form, date & score) click on the "Add Test" button.

The screen will again refresh and you will see a confirmation message.

The post-test will now show in the history box and may be edited and/or deleted until the tests have been approved.



Series Entry	
Date	4/1/2013
Justification	Non-Traditional 2
Functioning Level	**ABE Intermediate High**
Action	Continued in same level
Approved	

Tests *

Test	Date	Score	edit	delete
Employability Competency System (ECS) Math [15M - C]	4/1/2013	233		
Life & Work Reading [187R - D]	4/1/2013	255		

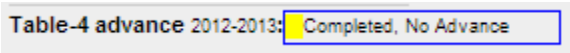
Distinction Between Efl Leveling And Table 4

Overall EFL is determined by the lowest level of the assessment battery.

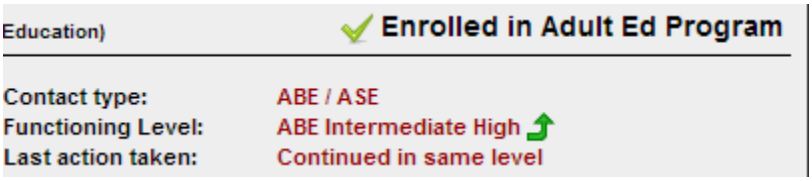
If the student is Non-Traditional 2 and tests at Level 2 in Reading and Level 3 in Math, the overall EFL is Level 2. Overall EFL will be changed when this student improves from Level 2 to Level 3 or higher in Reading.

Table 4 is calculated on a per-test basis, however.

In the example above, the student could pre-test as Level 2 in Reading and Level 3 in Math. Should the student improve his Math score from Level 3 to Level 4 he/she qualify for inclusion as completing a Level on Table 4.



But because the lowest score level in that example remains Level 2 in Reading, however, the student's OVERALL EFL remains at Level 2. **His ACTION TAKEN is Continued in Same Level.**



ACCUPLACER Entry

For students with an enrollment type of College Transitions, the entry of Accuplacer Scores will be required.

One Accuplacer score in each of the six possible categories may be entered as a pre-test.

- Arithmetic
- Elementary Algebra
- College Level Math
- Reading Comprehension
- Sentence Skills
- Write Placer

There is no requirement that all six be entered.

Once the pre-test scores are entered, additional test entries may follow.

Accuplacer score entries may be edited and/or deleted until Approved. Editing or deletion must begin with most recent entries and work backward. Only the last entry can be edited or deleted.

For more information on Approvals see the Approvals *section of this document.*

Accuplacer score entries may be added to the student record at any time so long as the student remains active in a College Transition registration type.

OUTCOME MEASURES

The final step in completing the student entry process is a review of Outcome Measures and the optional entry of Secondary Measures.

Automatic Cohort Outcomes applicable for the student will be displayed.

Outcome Measures are automatically assigned based on information in the student's data record based on requirements established by the NRS for fiscal 2012-13 forward.

Obtain a GED

- Students who have taken all five components of the GED Assessments and have a Pass/Fail record
- Students who are enrolled in an Adult High School program
- Students enrolled in the Assessment Phase of an EDP Program

Enter Employment

- Students who have a Status of "Unemployed" for the fiscal year

Retain or Improve Employment

- Students who have a Status of Employed (either Full or Part-Time)
- Students who are reported has having achieved the Goal of "Enter Employment" who exited two quarters prior

Enter Postsecondary Ed or Training

- Students who reported having achieved a GED
- Students who have a Status of completing a High School Credential or Higher in either US or Non-US schooling
- Students enrolled in a program/class designed for transition to postsecondary education or training

NOTE: All students have the goal of Improving Basic Literacy Skills (ABE/ASE) or Improving Basic English Skills (ESL). These are the default goals. The system credits the student with achieving these goals on Table 4.1 when educational functioning level (EFL) advancement is made.

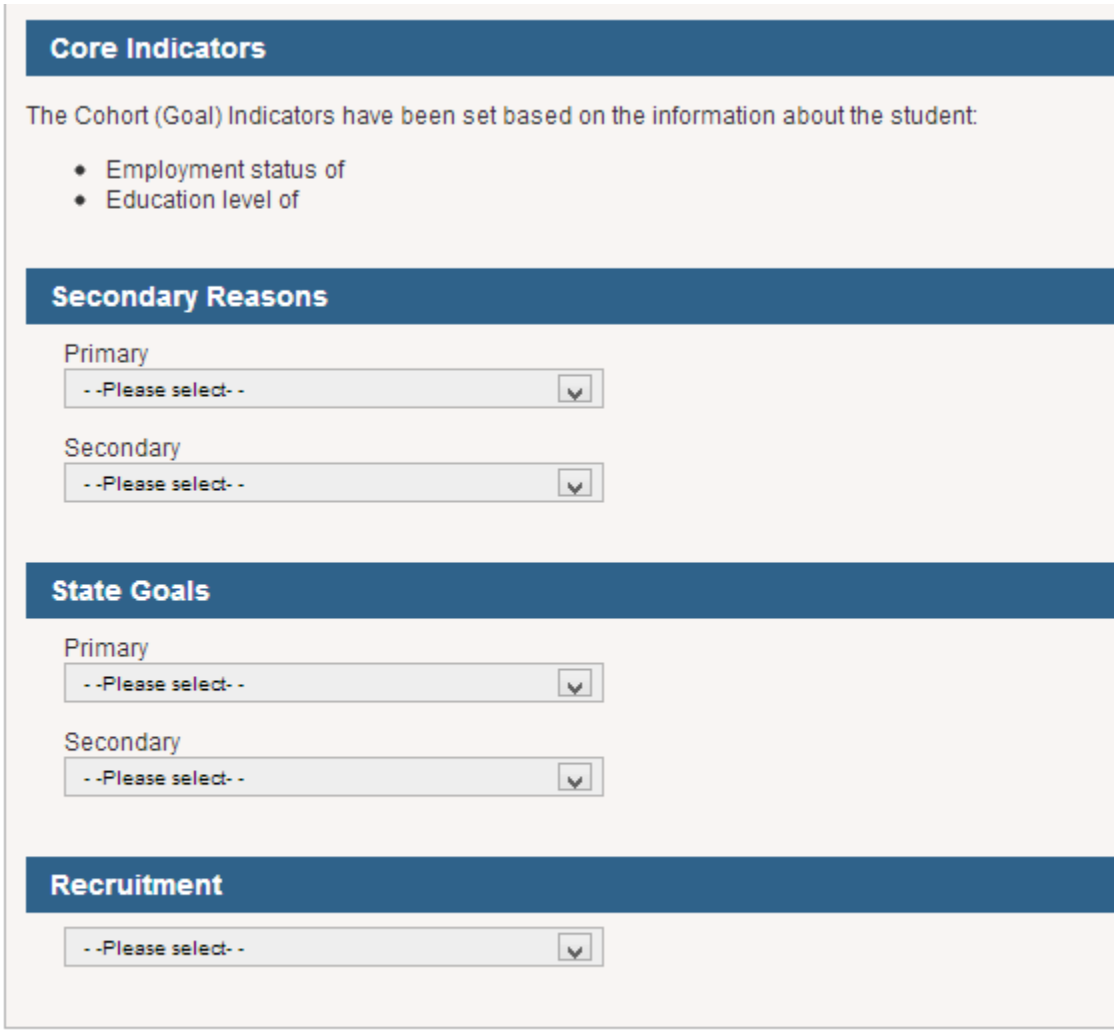
Optional secondary outcomes may be established in the Secondary Reasons block.

State Goals may be established (if applicable) in the State Goals block.

Student Recruitment may be entered in the Recruitment Block.

NOTE: None of these fields are mandatory.

Once the Outcomes and Goals have been reviewed and set, SUBMIT THE STUDENT DATA FOR APPROVAL



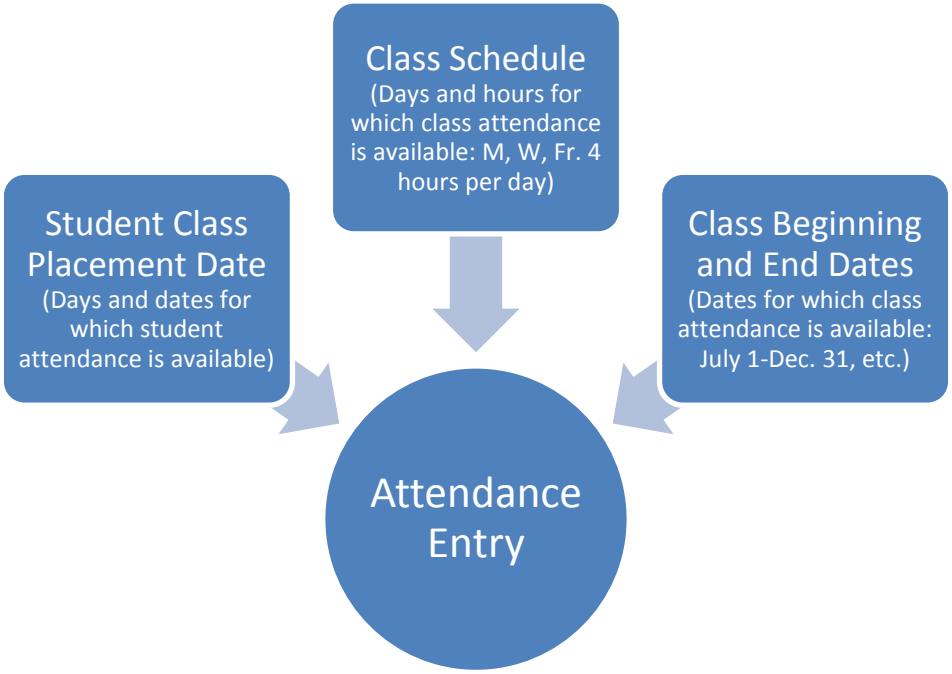
Submit for approval >>

ATTENDANCE ENTRY

The system collects both Class (Teacher) and Student Attendance for all classes. The rationale for collecting class attendance in addition to student attendance is so that the system will ultimately be able to provide a variety of comparative reports that can measure attendance and performance metrics.

As an example, reports will be available that will allow a review of the percentage of class hours attended by students on average and by each individual student.

Attendance entry is impacted by three different sets of data, each of which determine what information will be displayed when the Hours Entry module is accessed.



Student Class Placement Date is set at the time a student is placed in a class.
Class Schedule and Class Beginning/End Dates are set during the creation/editing of classes.

Example: The class 'Halloween Decorating' is created with a begin date of October 1 and an end date of October 31. Halloween Decorating meets on Tuesday and Thursday from 6 pm to 9 pm.

These two parameters establish the fields that will display in the "Enter Hours" module for the class. When the Enter Hours module is accessed it will display Tuesdays and Thursdays during the month of October. Each date's entry will default to three hours based on the class schedule.

For this example, only the dates with both RED and YELLOW will be available for attendance entry.

October 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

For students in the class, the Class Placement Date establishes which of those dates will be available.

Using the same class as an example, if Michael Myers is placed in the class on October 16, the first possible attendance date available to him would be on Tuesday October 16 (Dates with RED, YELLOW, and BLACK.). He would not have attendance entries available for the October 2, 4, 9 or 11 dates (using the 2012 calendar).

October 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Attendance Sheet

Student Attendance can be kept manually on a printable attendance sheet available in the system that mirrors the student attendance screen.

Alternately, attendance can be kept directly in the system on a day by day basis by following the Class Hours Link.

The Attendance Sheet for each class can be accessed via the Attendance Sheet Link under the Class Management Section in the left hand navigation bar.

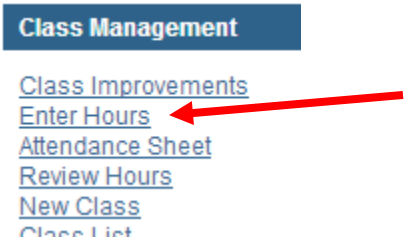
Attendance dates can be filtered down to an individual day or over any span for which the class is scheduled to meet (as determined by the Start and End Dates and Class Schedule section of the Class Creation module)

NOTE: The Attendance Sheet does not track attendance entered in the Hours Entry module, it is merely a printable form on which attendance can be kept by hand.

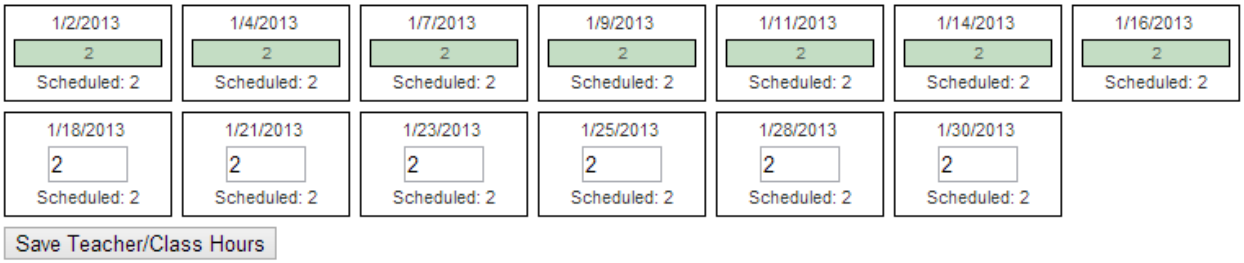
Hours Entry

Attendance is entered on a class by class basis.

- Select the Class for which attendance is to be entered. Follow the ENTER HOURS link under the Class Management section in the left hand navigation bar.



- The default display will show all available attendance dates from the beginning date of the course to the end date of the course based on the class schedule. *Use the filter to reduce the number of date possibilities to work with a smaller sample.*
- Date boxes highlighted in green have been entered and approved and cannot be edited.
- Date boxes that are "grayed" out are for dates in the future and cannot be edited. Data validation routines prevent the entry of dates in the future.



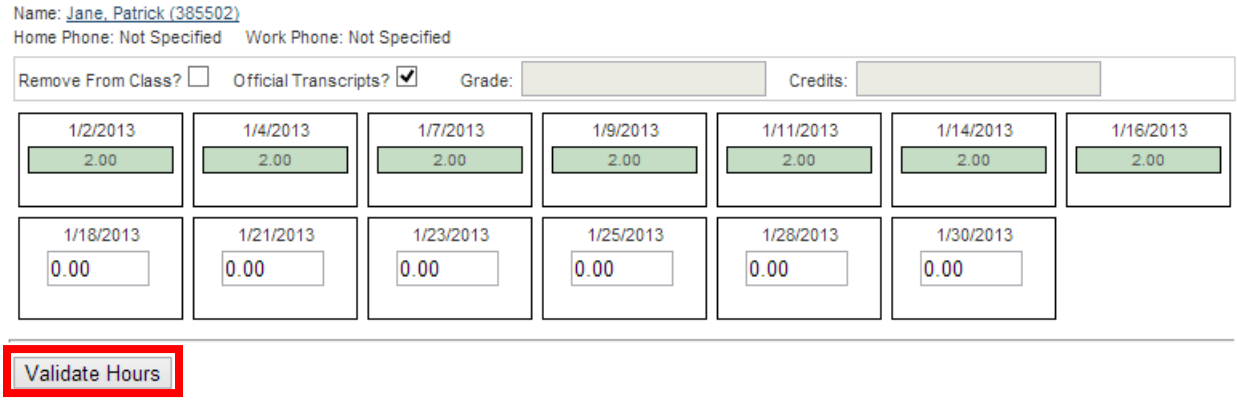
- The default value in the class attendance field reflects the number of hours the class meets as established in the class schedule. This value can be edited.
- Enter a number of class hours in each day for which attendance is to be entered in order to continue to student hours.
- If the number of class hours is zero, the date will remain open and no student hours can be entered.
- If the date a class met is not available, use the Add New Meeting link to create a new class meeting date. Enter hours for that class meeting date.
- Once class hours have been determined, continue to enter student hours.

NOTE: Student hours for a meeting date cannot exceed the number of hours entered for the class meeting date.

- The student attendance screen will display all students placed in the class during the date span selected.
    - If the student's class placement is after the first date in the span, the attendance entry option will not be available for any meetings prior to the filtering date
- For each date in the span, enter the applicable student attendance hours.

NOTE: A zero entry in the student attendance field for any date will pass through as a zero (or did not attend) for that date to approvals.

- Once the hours have been entered, click on the VALIDATE HOURS button.



- This checks the number of hours against a pre-determined number of hours recommended between assessment entries. For example if the value is set (by the state) at 60 and the hours attended for James B. Student will exceed a cumulative total of 60 since the date of his last test, the system will warn you that the student has exceeded the recommended number of hours between pre and posttests.
- If the validation warning appears you can either navigate away from the attendance entry page (which will require the re-entry of the attendance entries for both the class and the students those dates) to enter a test for the student(s) flagged as having exceeded the recommended hours or you can bypass the Validation Warning and continue.

NOTE: the Validation Warning does not prevent the entry of hours.

- To proceed, click the SUBMIT HOURS button.
- Hours are then submitted for approval.
- Until approved, hours can be edited using the same process.
- Once approved hours are locked in and unavailable for editing.

TIP: Before approval, verify that all student hours for the meeting date have been entered. If your Class Roster spans more than 1 page, it is recommended that you Validate Hours AND Submit Hours for EACH PAGE before proceeding to the next page.

To input hours, fill out the page that is currently showing, click validate hours, and then click save. If there are multiple pages (meaning there are more than 25 students) this will bring you to the next page automatically. Once you're on the last page, you'll be redirected to the start of the page with a notification if the save was successful.

You can also use the previous and next buttons below to skip pages, or just browse students. Additionally, may use the filter by last name option to search for specific students.

Unapproving/Deleting Attendance

Once attendance has been entered and approved those entries cannot be altered at the program level.

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

WORKING WITH AN EXISTING STUDENT

If the student already has an enrollment record in the system, his history will be displayed (see illustration below)

ADD / EDIT STUDENT

Please search for an existing student and only if he or she cannot be found please click here to enter new student into the system.

Student Lookup: Show / Hide

Student Name	Date of Birth	Current Enrollments		
Milam, Leone	1/15/1982	Enrolled in the following	Date Created	
		York Adult Education ABEASE/ESL — Enrolled: 7/1/2011 NRS Reported Program — Separated: N/A	7/1/2011	Edit | Profile
		create enrollment		
Flintstone, Pebbles	6/4/2012	Enrolled in the following	Date Created	
		Auburn Adult Education HSD/GED — Enrolled: 6/5/2012 HSD/GED — Separated: 6/3/2012 College Transitions — Enrolled: 6/5/2012 College Transitions — Separated: N/A HSD/GED — Enrolled: 6/5/2012 HSD/GED — Separated: N/A	6/5/2012	Edit | Profile
		York Adult Education ABEASE/ESL — Enrolled: 7/1/2011 NRS Reported Program — Separated: N/A	7/1/2011	Edit | Profile
		create enrollment		

In the example above the first student has a current ABE/ASE/ESL Enrollment in York Adult Education. The second student has one separated HS/GED Enrollment, one active HS/GED Enrollment and one active College Transitions Enrollment in the Auburn Adult Education Program. She also has an active ABE/ASE/ESL Enrollment in York Adult Education.

From this screen, the following options are available:

1. Either student can be enrolled in any Enrollment Type in any program other than York.
2. York Adult Education can add any Enrollment Type to either student with the exception of ABE/ASE/ESL as both students have active Enrollments of that type in the York Program.
3. Auburn Adult Education can add any Enrollment Type to the first student, and can add any Enrollment Type other than HS/GED and College Transitions to the second student as she already has active enrollments of that type in the Auburn program.
4. Either Auburn or York can edit the enrollments and separate one or more enrollments (provided the student is no longer actively registered in any classes that are attached to those enrollment types).

If the program desires to create a new enrollment for the student, the following steps would apply:

1. Choose "Create Enrollment" to create a new Active Enrollment for the student in the program. If the user has a role assigned to a new program, a new enrollment record will be created for the student. If the user has a role assigned to a program with a current enrollment, an enrollment record will be added to that program.
    a. Students can have multiple Enrollment Types within the same program.
    b. Students CANNOT be simultaneously enrolled in the same Program multiple times.
    c. Students CANNOT have two of the same Enrollment Types currently active in the same Program
    d. Multiple Enrollment Types can be added to the student record prior to continuing.
2. Once the Enrollment Type for the student is selected, proceed through the remaining steps of the process in the same manner as for a new student (See Above).

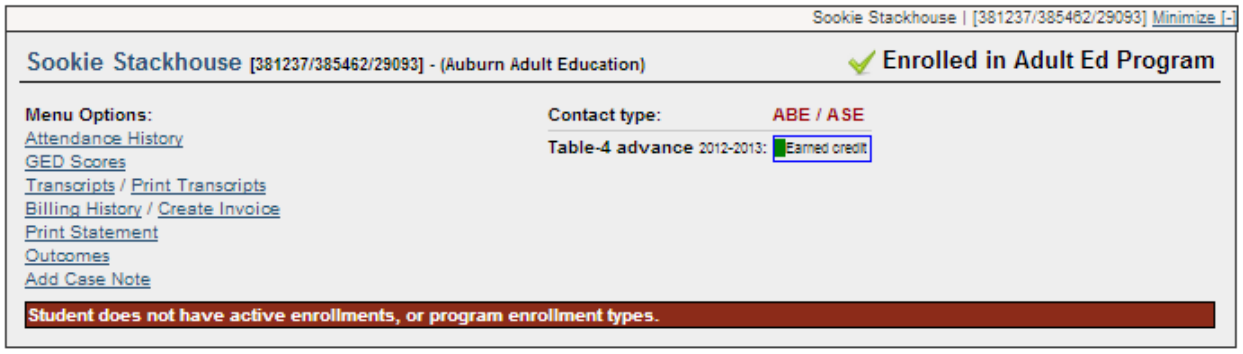
NOTE: If the student is to have an NRS Registration, the Employment and Last Grade Completed fields in the Student Demographics section cannot be changed if they have been set by another program or in a previous registration in that fiscal year.

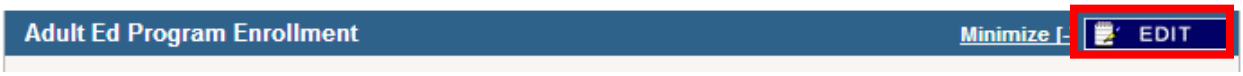
MULTI-PROGRAM STUDENTS

Students may be enrolled in more than 1 Program.

To add a Secondary Enrollment select the student and navigate to their Snap Shot.

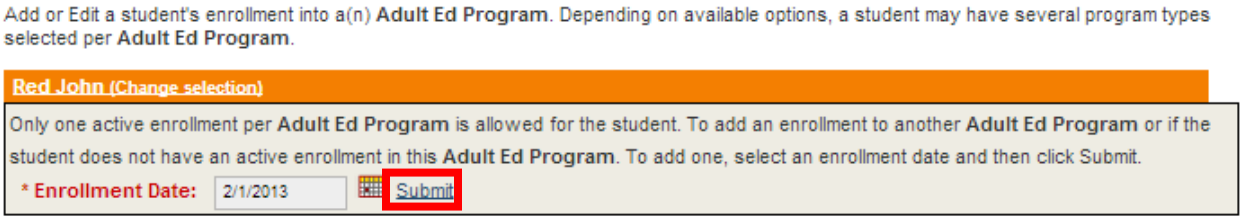
Click on the "EDIT" button in Adult Ed Program Enrollment.





From the list, select the Program to add an enrollment.

Select the Enrollment Date and click the "Submit" hyperlink.



From here you can proceed to adding Program Types, Class Placement, etc.

PLEASE KEEP THE FOLLOWING IN MIND –

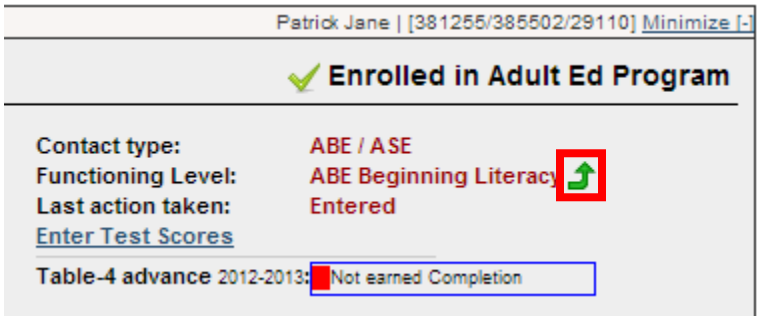
a. **Students can have multiple Enrollment Types within the same program.**
b. **Students CANNOT be simultaneously enrolled in the same Program multiple times.**
c. **Students CANNOT have two of the same Enrollment Types currently active in the same Program**
d. **Multiple Enrollment Types can be added to the student record prior to continuing.**

STUDENT EFL CALCULATION, LEVELING AND TABLE 4

Assessment scores (both pre-test and post-test) entered into the system will automatically generate an Educational Functioning Level (EFL) for the student.

The system will also automatically calculate what subsequent scores are required for the student to complete that level and advance. This information can be viewed at the individual student level or at the class level.

Improvement Requirements at the student level may be accessed by selecting the green arrow next to the functioning level in the Student Snapshot Box.

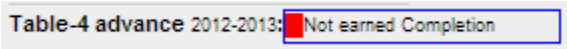


Test Battery:	CASAS	Latest Series Date:	7/1/2012
Required Tests		With Minimum Score	
Life & Work Reading		201	
One hour of attendance requirement: N/A			

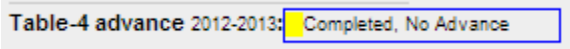
Improvement Requirements for an entire class can be accessed via the Class Improvements Link in the Class Management portion of the left hand navigation menu.

In addition, the system provides an at-a-glance indicator that indicates whether the student has completed the requirements to earn a completion or a gain sufficient for inclusion on Federal Table 4.

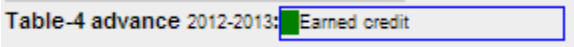
- Red Status indicates the Student has not achieved a Completion for Table 4 purposes.



- Yellow Status indicates the student has achieved a Completion (based on assessment entry) for Table 4 purposes



- Green Status indicates the student has achieved an Advance (based on hours entry after the date of the assessment) for Table 4 purposes.



Initial tests (pre-tests) will be entered into the system as either traditional, non-traditional 1 or non-traditional 2.

- Traditional entry requires a score to be entered for each test in the battery in order to generate the beginning EFL for that student. In the case of TABE 9/10 for example, there are three assessment measures, therefore a traditional series would require scores for Math, Reading and Language.
- Selecting non-traditional 2 allows for the entry of two scores in the test battery and
- The selection of non-traditional 1 allows for one test in the battery to be entered.

Post-test assessments can be entered at any time during a student's registration.

NOTE: Post-test entry will recalculate EFL, action taken and improvement requirements for the student.

Possible Action Taken entries are:

- Entered (pre-test only)
- Continued in the Same Level
- Regressed to a Lower Level
- Completed the Level (based on assessment scores)
- Advanced to the Next Level (based on attendance entry)

Validation routines require that the test date entered for each assessment falls between the student's registration date and the current date (Tests cannot be entered in the future). Date validation also requires that assessments be entered in logical sequence.

Test battery validation ensures that assessment scores are entered within the range of scores applicable to that particular assessment measure.

System validation routines will require alternating versions of tests based on requirements for each test.

Regardless of the number of scores entered, EFL is determined by the lowest score of the test battery.

Learner's entry level in Table 4 Column B will be established by the lowest score of the tests taken, again regardless of number.

The number of scores used for subsequent (post-test) leveling will be based on the number of pre-test scores entered.

- The most recent scores for each of the three possible tests will be used for leveling if the pre-test was originally entered with three assessment scores. (Traditional)
- The most recent scores for each of the two types of tests entered will be used for leveling if the pre-test originally contained two assessment scores (Non-Traditional 2)
- The most recent score will be used for leveling if the pre-test originally contained one assessment score. (Non-Traditional 1)

The pre-test/post-test cycle is complete and the test battery can be changed only under two conditions:

1. when all tests entered as a pre-test have a post-test score.
2. Or when one or more post-tests allow the learner to advance a functioning level.

All post-tests are not required to be entered at the same time. For example: If a student is pre-tested as Traditional and takes TABE 9 Math, TABE 9 Language and TABE 9 Reading, the learner should next have scores posted for TABE 10 Math, TABE 10 Language and TABE 10 Reading. Prior to the completion of this cycle, the student may take any number of Reading tests (always alternating between the 9 & 10).

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.

STUDENT CLASS PLACEMENT

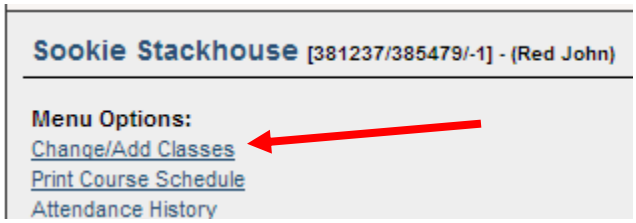
Students are typically placed in classes during the initial entry process.

Over the course of a student's participation in an Adult Education Program, his/her Class Placements may need to be changed.

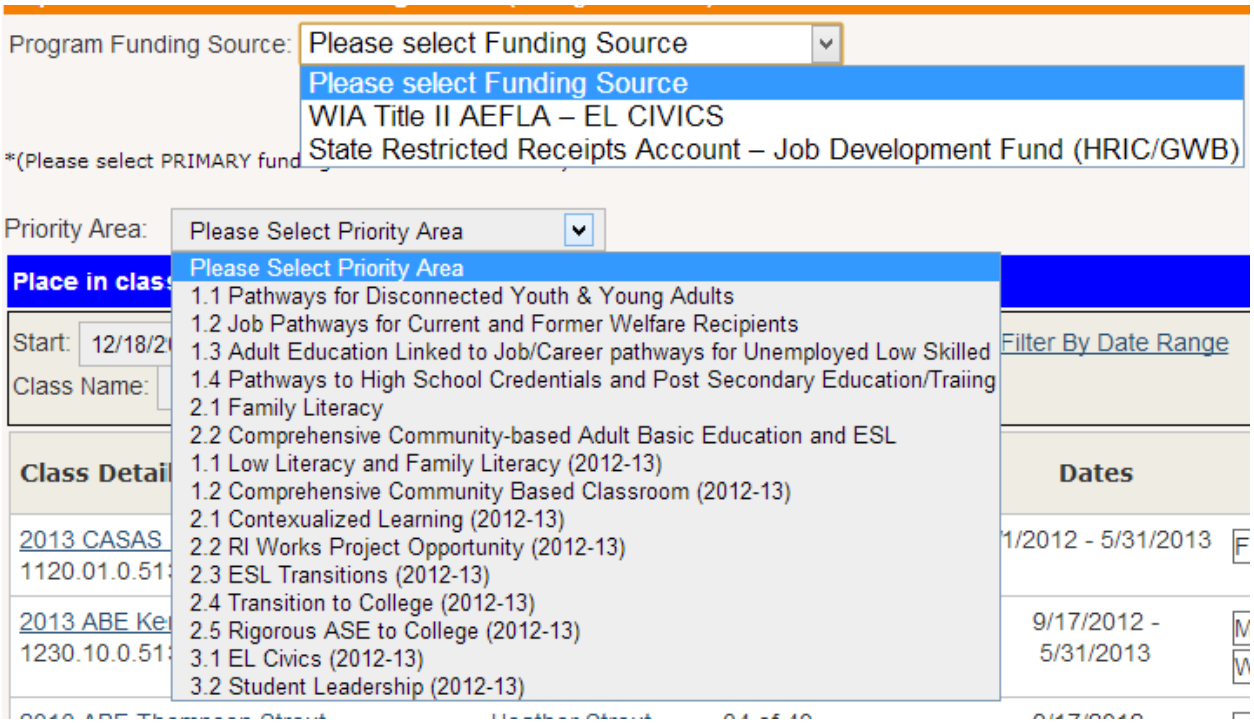
Placing A Student In Classes

To place a student in a class or classes

- Navigate to the Class Placement screen by selecting the Change/Add Classes Link from the Student Snapshot Box

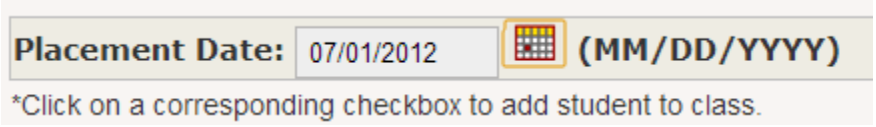


- (Optional)For those systems which track Funding Source, select the funding source for the student's class placement. All systems do not have this option. NOTE: If the appropriate funding source is not included in the dropdown, contact the state office to request changes.

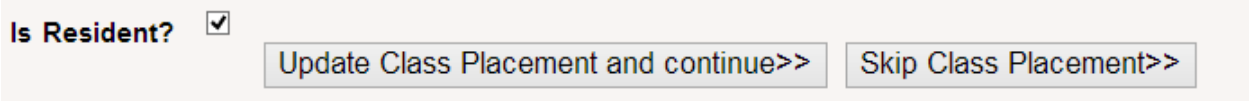


- Select the class or classes in which the student is to be placed by checking the box to the right of the row containing information on the class.

- Set the Class Placement Date by editing the Class Placement Date field. ***This date establishes the first date for which a student may have attendance hours entered for a class.***



- (Optional) For those systems which implemented the Billing and Fees module, determine if the student should be charged resident or non-resident fee rates for the class by selecting or de-selecting the "is resident" checkbox.



Class Enrollment Info And Alerts

The Class List in the Student Class Placement Screen contains information related to the class size and maximum enrollments. Classes that have reached the capacity set during the class creation process are marked as FULL.

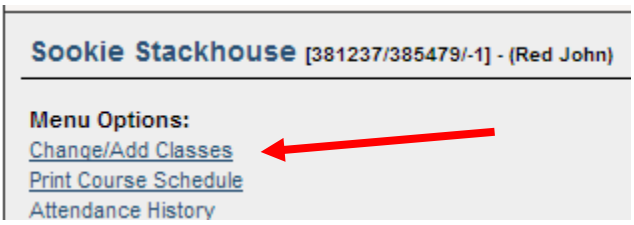
This designation does not preclude the entry of additional students into the class; it is merely an alert/warning that the established class maximum has been exceeded.

Removing From Classes

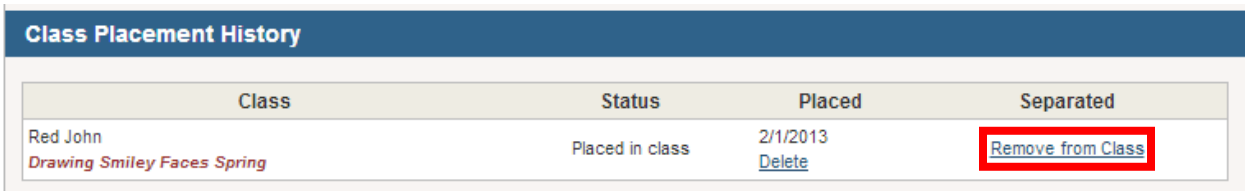
Option 1

To Remove a Student from a Class on an individual basis

- Navigate to the Class Placement screen by selecting the Change/Add Classes Link from the Student Snapshot Box



- From the Class Placement History Block, select the Remove From Class link



- This will generate a date prompt and the option to add class information to the Student Transcript
    - Set End Date as the last day of student participation in the class.

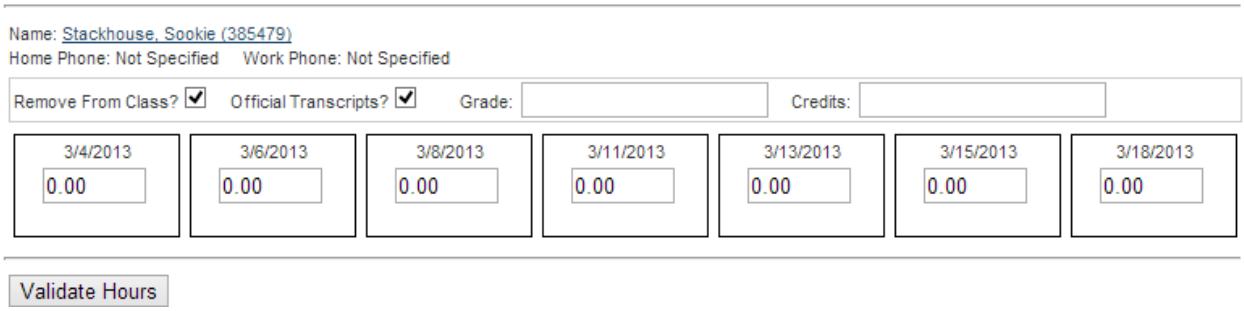
        - End Date must be AFTER Placement Date
        - End Date CAN NOT be a date in the future
    - If the inclusion of class information on the historical record is desired, check the box beside Remove from Class button and enter
- If Transcript information is desired, additional information about the course may be entered.

Option 2

To Remove a Student during Attendance Entry:

Students may also be removed from Class Rolls during the attendance entry process.

- Choose Separate From Class box



- Choose whether Class Information will be applied to the Student Record
- Enter a Grade and Credits if desired
- Submit Hours for Approval.

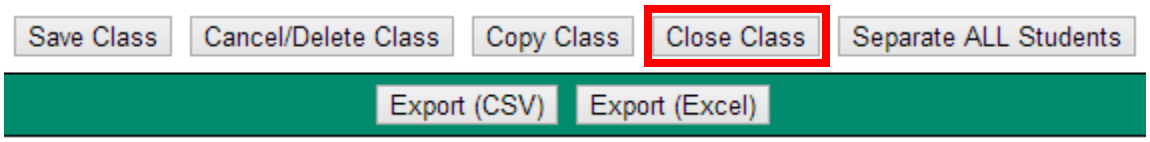
Once approved, the student will be removed from the class as of the last date of attendance entry.

Option 3

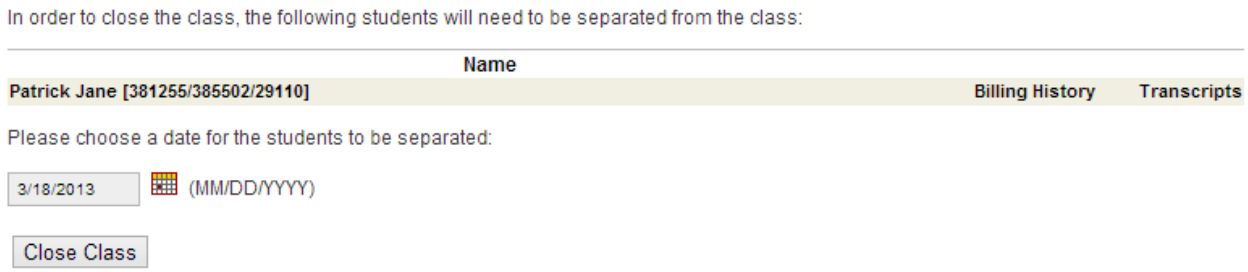
Remove a Student during Class Close Module

Students may also be removed from Class Rolls by closing a class.

- Select the Close Class button in the Class Create/Edit Module



- A list of all students currently on the class roll will be generated and an option to remove all students as of the effective date entered will be provided.



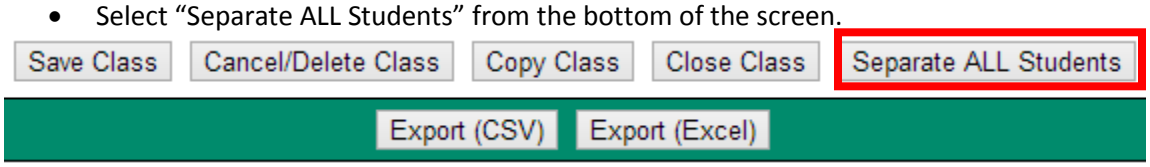
- This option will clear the class roll and close the class on the date selected.

Option 4

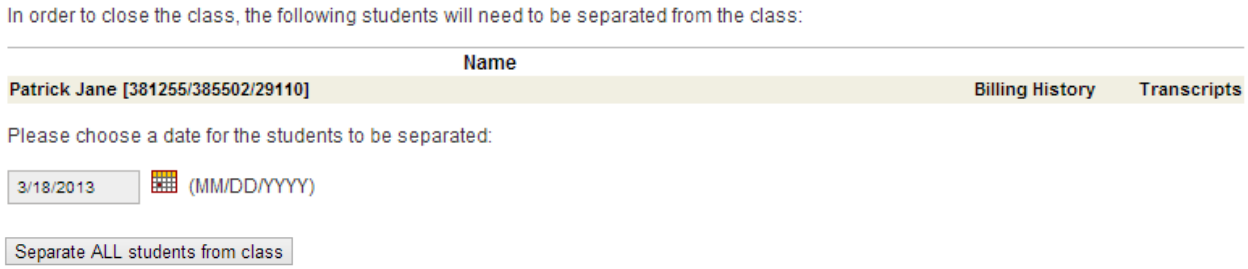
Remove all students from a Class and leave it open.

From the Add/Edit Class screen for the class:

- Select "Separate ALL Students" from the bottom of the screen.



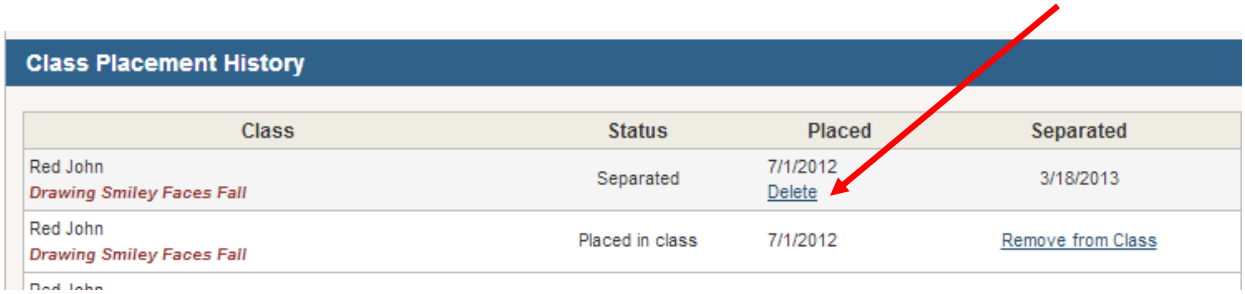
- A list of all students currently on the class roll will be generated and an option to remove all students as of the effective date entered will be provided.



- This option will clear the class roll on the date selected but will NOT close the class.

Deleting From Classes

If a student has no attendance entries, he/she may be DELETED from the class using the "Delete from Class" link which will be available under the Class Placement Date.



Class Placement History

Class	Status	Placed	Separated
Red John *Drawing Smiley Faces Fall*	Separated	7/1/2012 Delete	3/18/2013
Red John *Drawing Smiley Faces Fall*	Placed in class	7/1/2012	Remove from Class

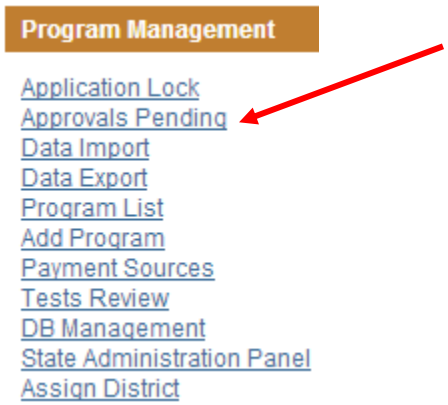
The delete option removes the student from the class entirely and allows for re-entry.

NOTE: Deleting a student from a class does NOT remove any invoices created as a result of the entry. Invoice entries currently must be managed in the Billing History module. Entries for fees associated with the class as well as any associated payments may be removed. See Billing History Module in this document for additional information.

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.

SEPARATING STUDENTS FROM THE PROGRAM

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.

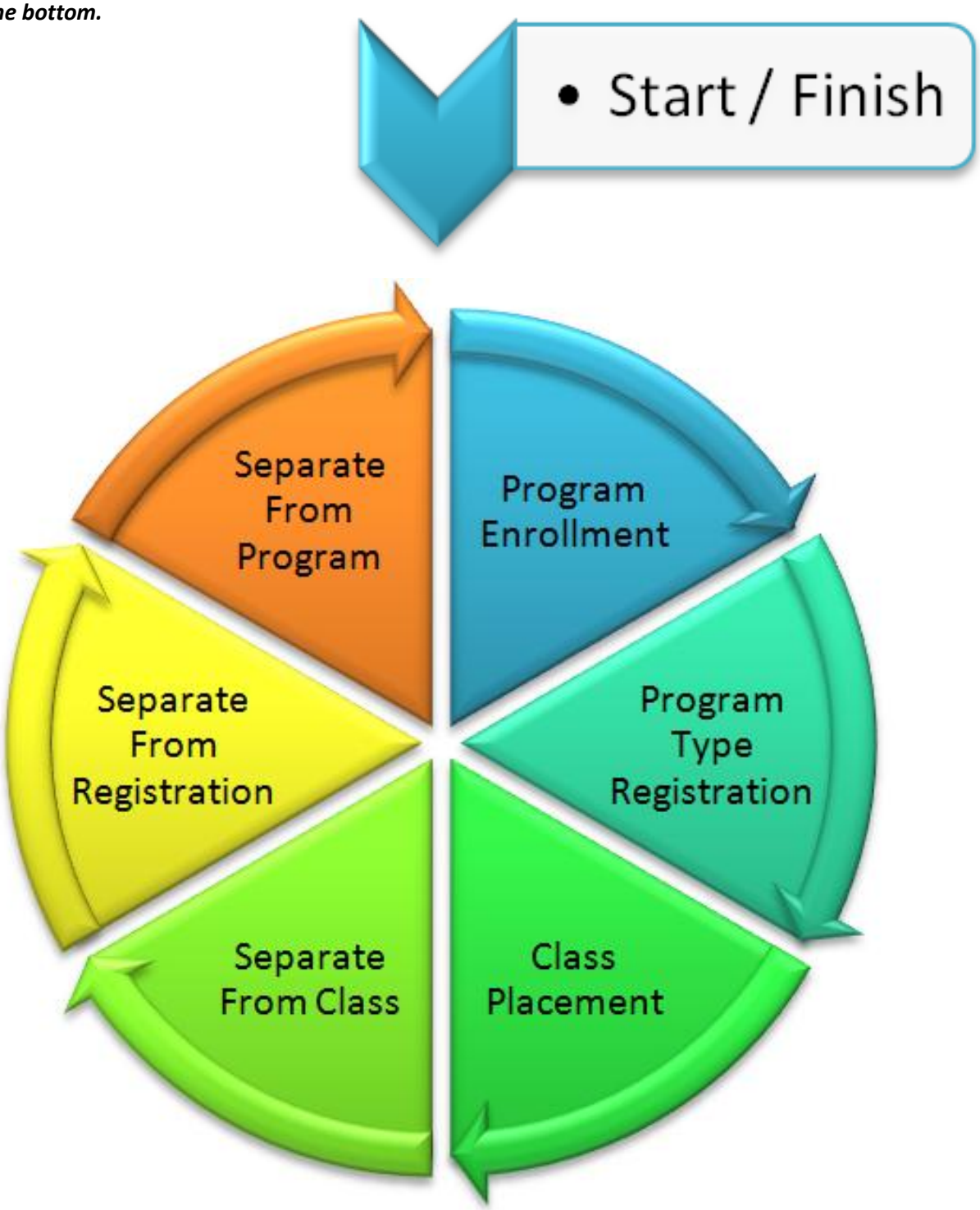
Separation from NRS Registration Enrollments is used to determine inclusion on Table 5.

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.

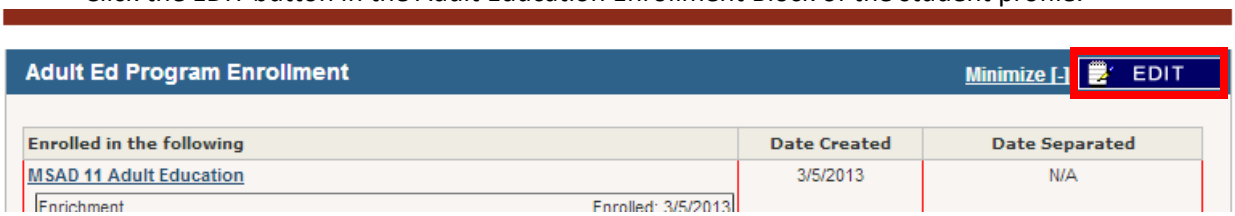
Separating a student from the NRS Registration will not cause the loss of any data.

The separation of a Student is a backwards re-tracing of the Enrollment Process. Think of it as climbing a ladder, once you reach the top you take the same steps in descending order to get back to the bottom.

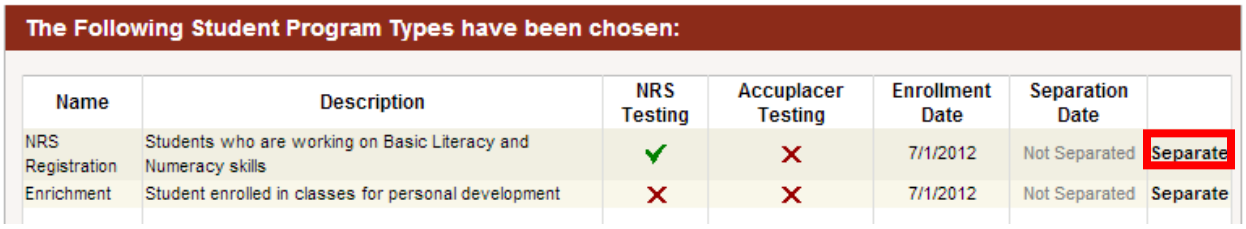


To Separate a Student:

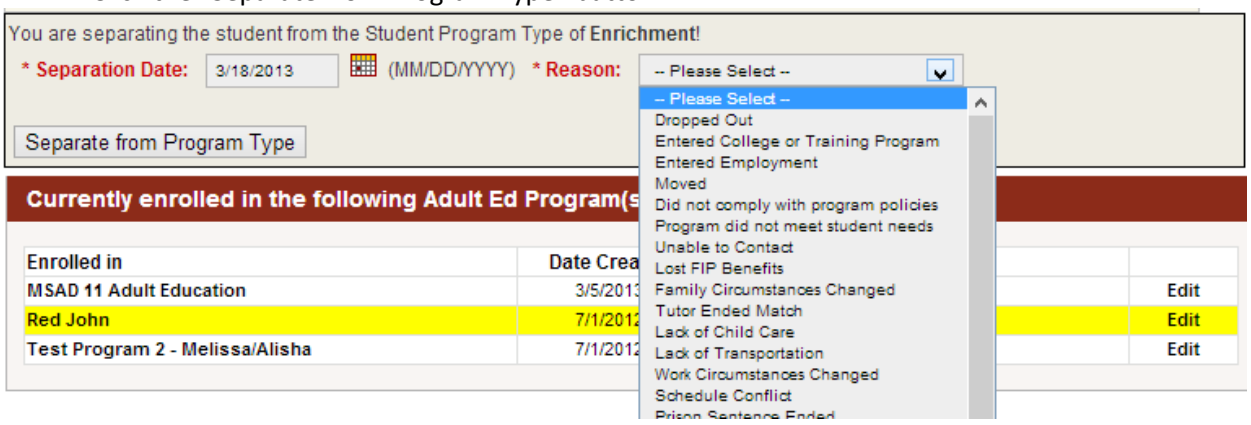
- Locate the student by searching or browsing for his or her record in the system.
- Click the EDIT button in the Adult Education Enrollment Block of the student profile.



- 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.
- Click the "Separate from Program Type" button.



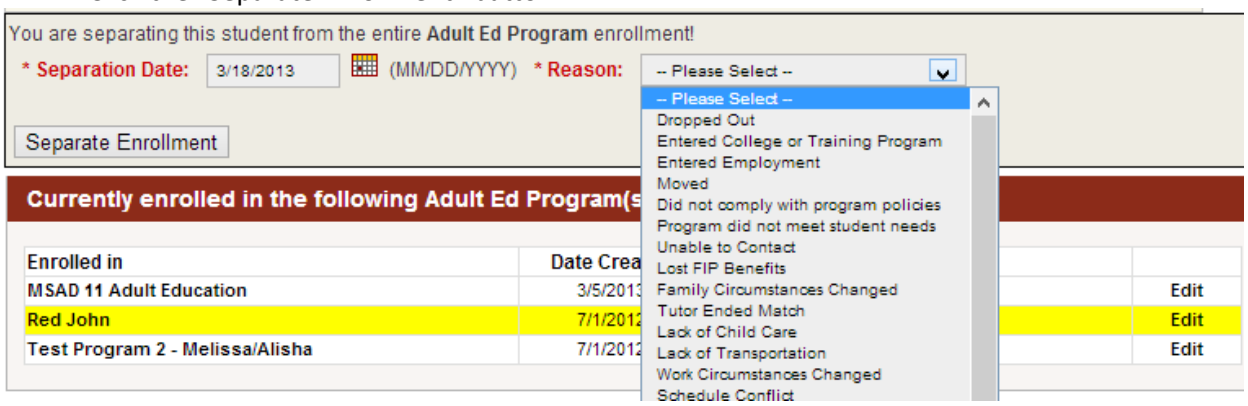
Follow the same process for each Enrollment Type prior to separating a student from a program.

Once all Program Types have been separated, you may then separate the student from the Program.

- Select the “Separate From Enrollment” hyperlink at the bottom of the page.

Just as with the Program Type you will need to:

- 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.
- Click the “Separate Enrollment” button.



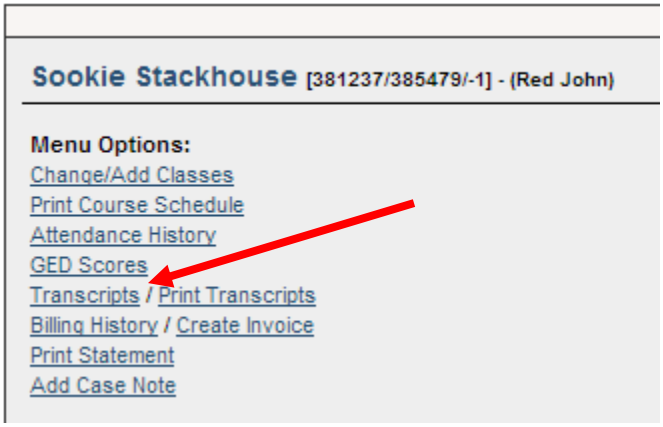
STUDENT TRANSCRIPTS

Student Transcripts provide a historical record of a student's participation in the Adult Education program.

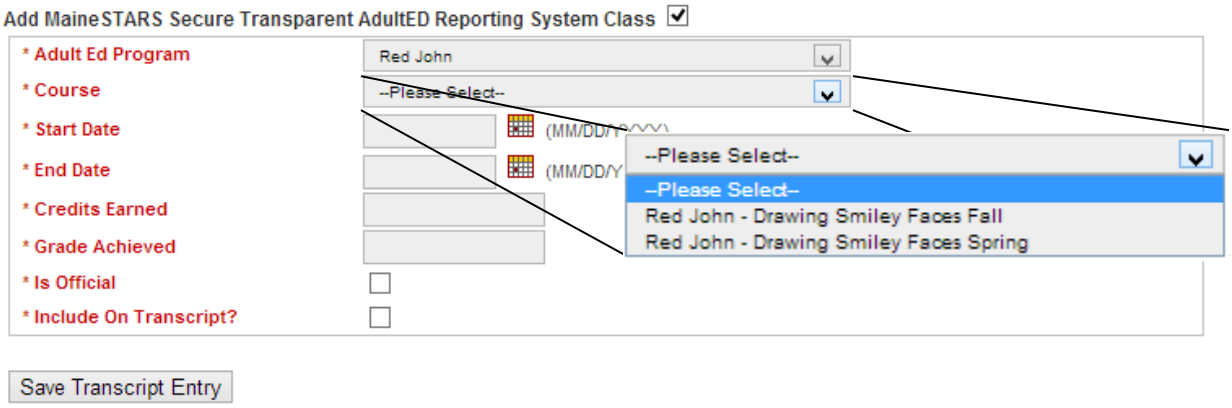
Adding Records

Information related to Class participation and/or completion may be entered at the time a student is removed from Class Rolls (see above).

Information on class participation can be entered retroactively or for programs outside the state system by following the Transcripts Link in the Student Snapshot box and selecting the Add New Record button.



Select the checkbox at the top of the Add Record screen to return information about classes in the current program. This will populate Your Program and Class information to the Add Record screen.



Information about courses and programs outside the state system can be entered by completing the required fields.

Once the appropriate fields are completed, select the Save Transcript Entry button.

Transcript information can be edited at any time by selecting the appropriate entry in the list of Transcript records and following the Edit link.

You may only view individual report cards for MaineSTARS Secure Transparent AdultED Reporting System classes.

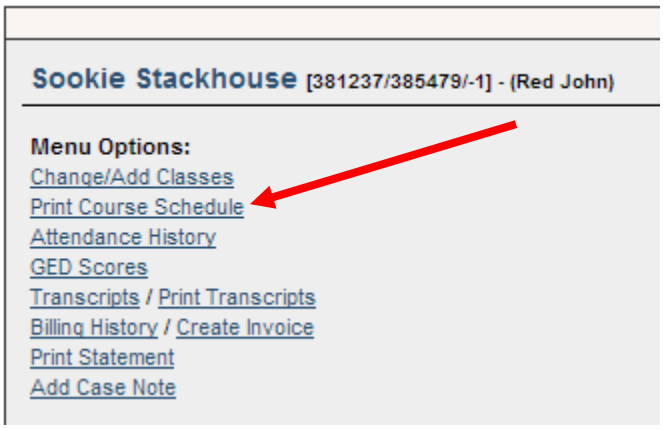
Course Name	Date Completed	Credits Earned	Grade	Location	Official	
Test Program 2 - Melissa/Alisha - How to Hunt For Peeps at Night In Bon Temps In the Swamp!	7/30/2012	2.00	A	Test Program 2 - Melissa/Alisha	✓	Edit | View
Drawing Smiley Faces Spring	5/31/2013	0.00		Red John	✓	Edit | View

Printing Transcripts

Select the Print Transcripts link in the Student Snapshot box to access printable transcript information for the student.

COURSE SCHEDULE

The Course Schedule link presents a list of classes in which the student is currently enrolled.



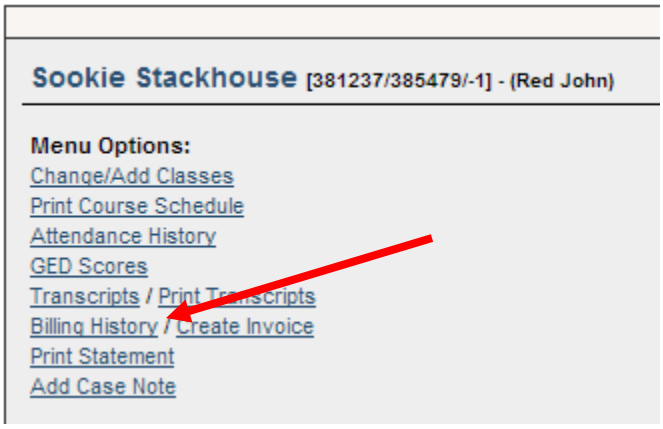
The list can be printed or exported to various different formats.

BILLING AND FEES (OPTIONAL)

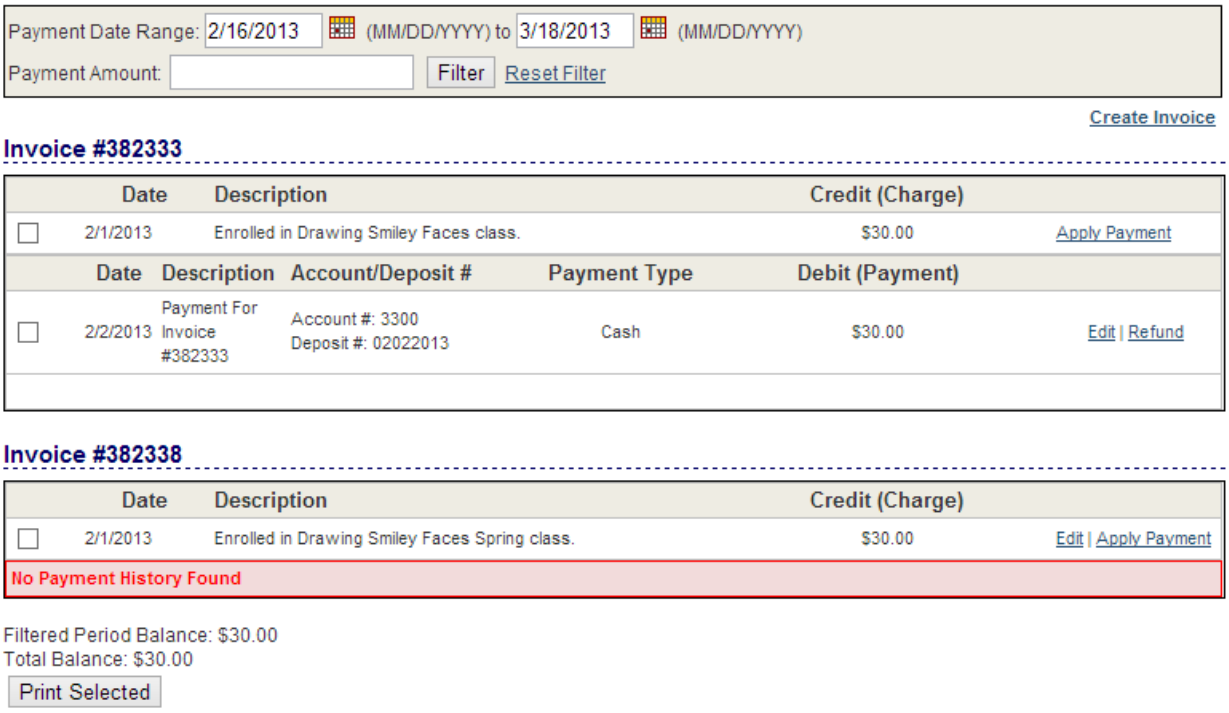
If the Billing and Fees Module is active, information about the student's invoice history may be accessed from the Billing and Fees related links in the Student Snapshot Box.

NOTE: Fees are applied to a student record based on Fees assigned to each class in which the student is enrolled. Fees are assigned to classes during the Class Creation Module.

Billing History



Billing History generates a list of all fees and credits applied to the student record. The Billing History can be filtered for a range of dates.

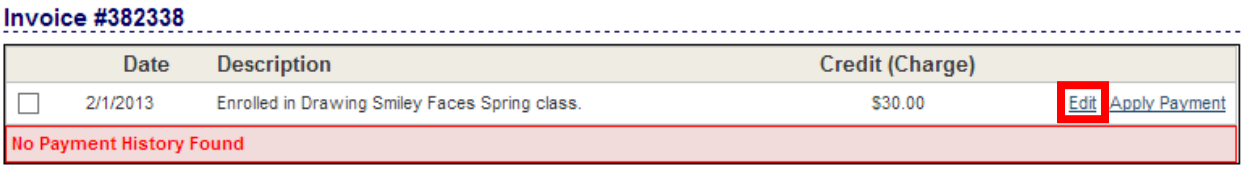


The historical list may be filtered by a date range or searched by payment amount.

The entire history may be printed, or select transactions can be chosen for printing.

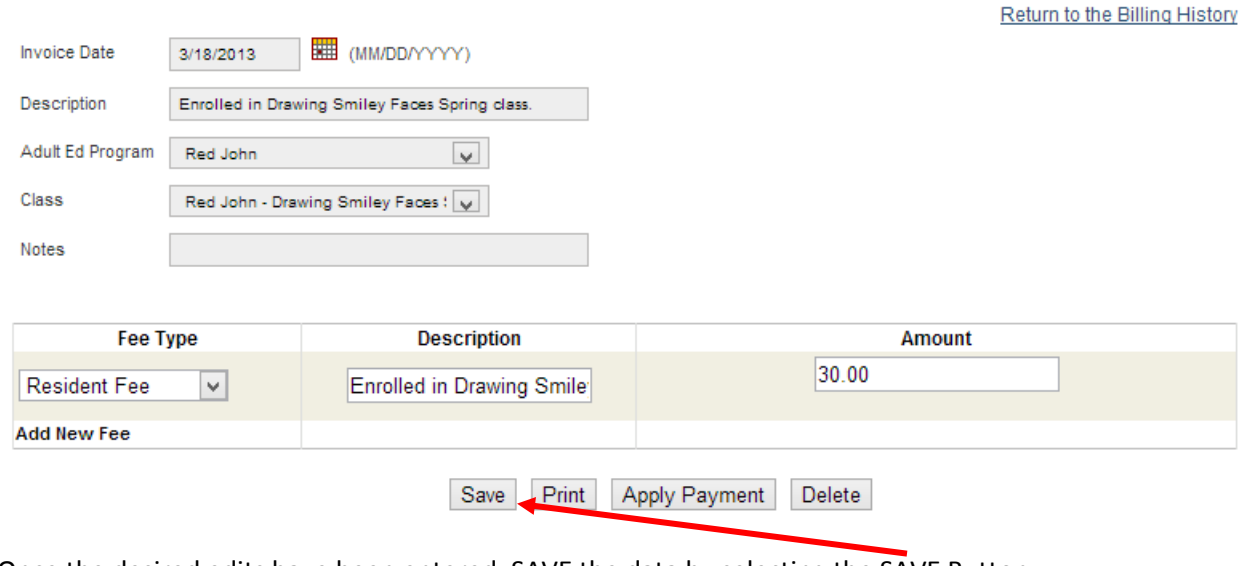
Editing A Billing Entry

From the Billing History Screen, transactions may be edited by selecting the EDIT link in the row in which the entry is located.



From the Edit Payment Screen the following data can be altered:

- Invoice Date
- Entry Description
- Class Name
- Fee Type
- Fee Description
- Fee Amount



Once the desired edits have been entered, SAVE the data by selecting the SAVE Button.

From this entry page additional fees can be added to the line item by selecting the **Add New Fee link.**

Deleting A Billing Entry

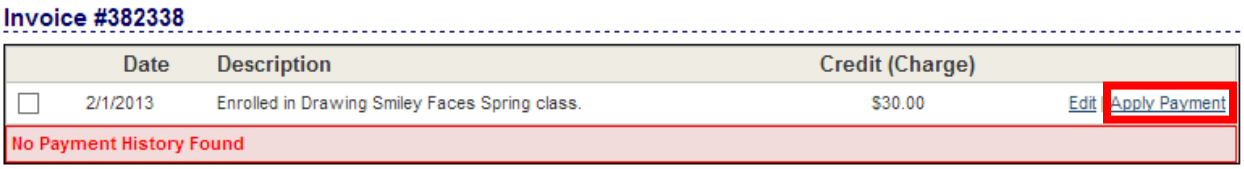
From the Billing History Screen, transactions may be deleted by selecting the EDIT link in the row in which the entry is located.

Beneath the transaction detail on the Edit Screen is a DELETE button. The Delete Button will remove the transaction from the student billing history.

- DELETING AN OPEN INVOICE WILL ALSO DELETE ALL PAYMENTS THAT HAVE BEEN APPLIED
- INVOICES THAT ARE PAID IN FULL CANNOT BE DELETED UNTIL PAYMENTS ARE FIRST DELETED OR REFUNDED.

Applying Payments

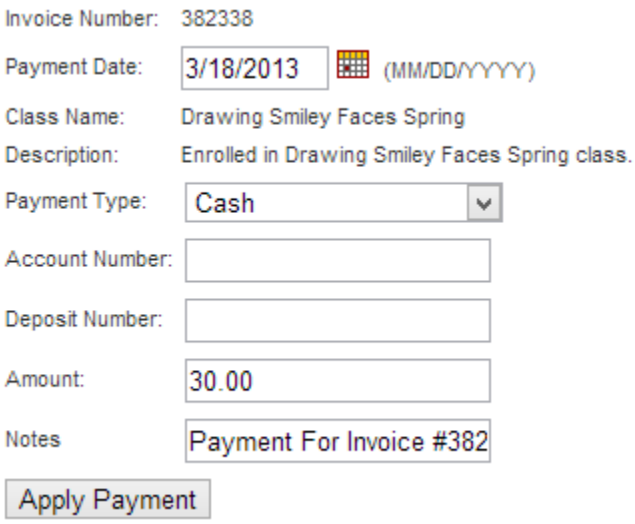
From the Billing History Screen payments may be applied to specific transactions by selecting the Apply Payment link.



NOTE: Payments must be applied to the course for which the fees were generated. This allows for a clear and concise audit trail.

To Apply Payment

- Select the Payment Type
- Enter the Account Number (if applicable)
- Enter the Deposit Number (if applicable)
- Enter the Payment Amount
  - Dollars and cents
  - No dollar sign required
- Enter Notes (if applicable)
- Select Apply Payment button



The Payment will be added to the Billing History transaction log.

Applying Refunds

From the Billing History Screen, transactions may be refunded by selecting the “Refund” link.

Invoice #382333

	Date	Description			Credit (Charge)	
☐	2/1/2013	Enrolled in Drawing Smiley Faces class.			$30.00	Apply Payment
	Date	**Description**	**Account/Deposit #**	**Payment Type**	**Debit (Payment)**	
☐	2/2/2013	Payment For Invoice #382333	Account #: 3300 Deposit #: 02022013	Cash	$30.00	Edit Refund

To Apply a Refund

- In the Payment Type dropdown select REFUND (Selected by default)
- Enter the Account Number (if applicable)
- Enter the Deposit Number (if applicable)
- Enter the Payment Amount
  - Dollars and cents
  - No dollar sign required
  - No minus sign
- Enter Notes (if applicable)
- Select Apply Refund button

Invoice Number: 382333
Payment Date: 3/18/2013 (MM/DD/YYYY)
Class Name:
Description: Enrolled in Drawing Smiley Faces class.
Payment Type: Refund - Cash
Account Number:
Deposit Number:
Amount: 30.00
Notes Refund for Invoice #38233
Apply Refund

NOTE: It is not necessary to put a minus sign in front of the refund amount. Since the system recognizes refunds as a negative amount, using a negative or minus sign in front of the refund amount can actually cause the system to process that amount as a payment and not a refund. (Two negatives make a positive).

The Refund will be added to the Billing History transaction log.

Invoice #382333

	Date	Description			Credit (Charge)	
☐	2/1/2013	Enrolled in Drawing Smiley Faces class.			$30.00	Edit | Apply Payment
	Date	**Description**	**Account/Deposit #**	**Payment Type**	**Debit (Payment)**	
☐	3/18/2013	Refund for Invoice #382333 Payment	Account #: N/A Deposit #: N/A	Refund - Cash	($30.00)	Edit
☐	2/2/2013	Payment For Invoice #382333	Account #: 3300 Deposit #: 02022013	Cash	$30.00	Edit | Refund

Deleting Payments

From the Billing History Screen, payments may be refunded by selecting the Edit link associated with the payment transaction.

Invoice #382333

	Date	Description			Credit (Charge)	
☐	2/1/2013	Enrolled in Drawing Smiley Faces class.			$30.00	Apply Payment
	Date	**Description**	**Account/Deposit #**	**Payment Type**	**Debit (Payment)**	
☐	2/2/2013	Payment For Invoice #382333	Account #: 3300 Deposit #: 02022013	Cash	$30.00	Edit Refund

The Payment Edit screen displays a link to delete a payment. Activating this link removes the payment from the student billing history and changes the remaining amount owed.

Invoice Number: 382333

Payment Date: 3/18/2013 (MM/DD/YYYY)

Class Name:

Description: Enrolled in Drawing Smiley Faces class.

Payment Type: Cash

Account Number: 3300

Deposit Number: 02022013

Amount: 30

Notes Payment For Invoice #382

Apply Payment Delete Payment

NOTE: Any deleted payments or invoices are stored in a separate database file for audit purposes. The system can upon the State request generate a historical record of all changes to billing records including dates, amounts, students affected and users who initiated the edits.

Creating Invoices

From the Student Snapshot Box, additional transactions may be added to the student record by selecting the Create Invoice link.

From within the Billing History you can also create an Invoice by clicking on the Create Invoice link on that page.

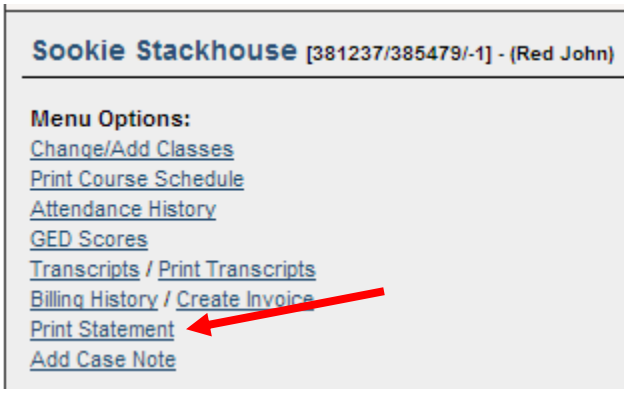
To Create an Invoice Transaction:

- Set Invoice Date
- Post a Description of the Invoice Transaction
- Choose the Class to which the Transaction Applies (If non-class related, leave the drop-down on "Please Select")
- Select the Fee Type
- Post a Description of the specific Fee
- Enter a fee amount

Once all information related to the new transaction has been entered, click the Save button to apply the record to the Student Billing History transaction log.

Printing Statements

From the Student Snapshot Box, a billing statement may be generated by selecting the Print Statement link.



To generate a Statement, choose a date range for the statement and click Submit.

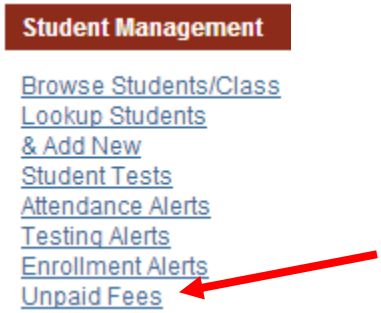
The Statement will display all transactions for the student during the date span requested.

The Statement may be printed from the screen or saved to a PDF for printing.

NOTE: Statements can be printed for an entire program simultaneously by selecting the Billing Statements Report link from the Reports Menu.

Unpaid Fees

At any time, users with the appropriate permissions may generate a list of Unpaid Fees (by program) by selecting the Unpaid Fees link in the Student Management Section of the left hand navigation menu.



The report lists all students with outstanding balances.

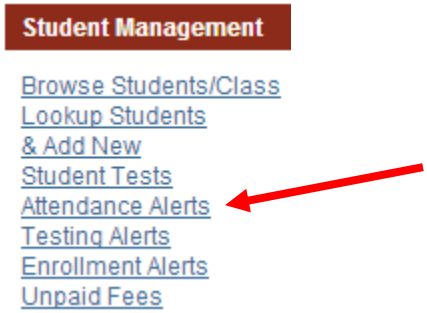
The report may be filtered by student and/or by class.

The report can be downloaded/exported into a variety of formats.

ATTENDANCE ALERTS

Attendance Alerts are standard management reports to assist in monitoring student attendance.

Attendance Alerts can be accessed via the Attendance Alerts link in the Student Management section of the left hand navigation bar.



Attendance Alerts display a list of students who have not had attendance entered for a specified number of calendar days.

Typically the threshold is set at or near 90 days in order to assist in following the 90-day Rule recommended by the NRS for student separation.

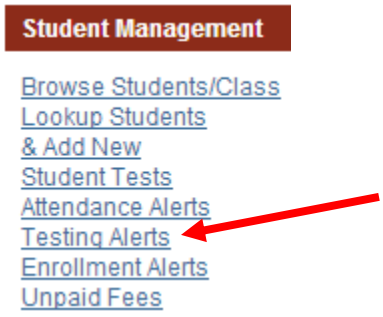
Students will remain on the Attendance Alert report until one of two actions is taken:

- Student has attendance entered that falls within the range
- Student is separated from the Program

TESTING ALERTS

Testing Alerts are standard management reports to assist in monitoring the amount of attendance accrued between student assessments.

Testing Alerts can be accessed via the Testing Alerts link in the Student Management section of the left hand navigation bar.



Testing Alerts display a list of students who have exceeded a set number of hours of attendance without an assessment being entered

Typically the threshold is set at or near 60 hours in order to assist in following meeting policy standards for assessment

Students will remain on the Testing Alert report until one of two actions is taken:

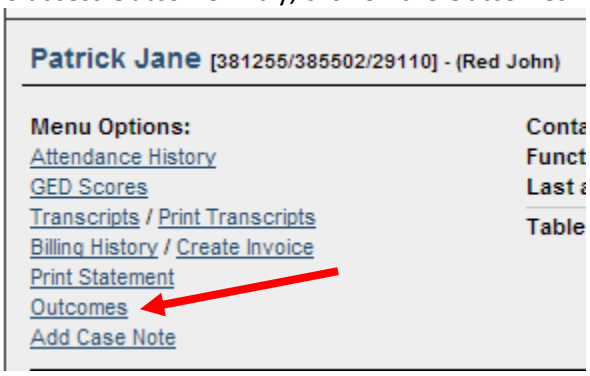
- Student has an assessment entered that falls within the range
- Student is separated from the Program

OUTCOMES ENTRY

MANUAL INDIVIDUAL OUTCOME ACHIEVEMENT DATA 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.

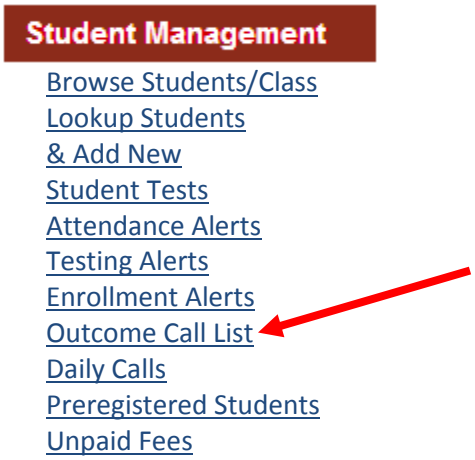
Data validation requires that the data entry specialist indicate that appropriate documentation exists for the outcome achievement being entered.

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.

OUTCOME CALL LISTS (OPTIONAL)

Should follow-up survey calls be used to verify Outcome achievement, the system offers an Outcome Call List generation mechanism.

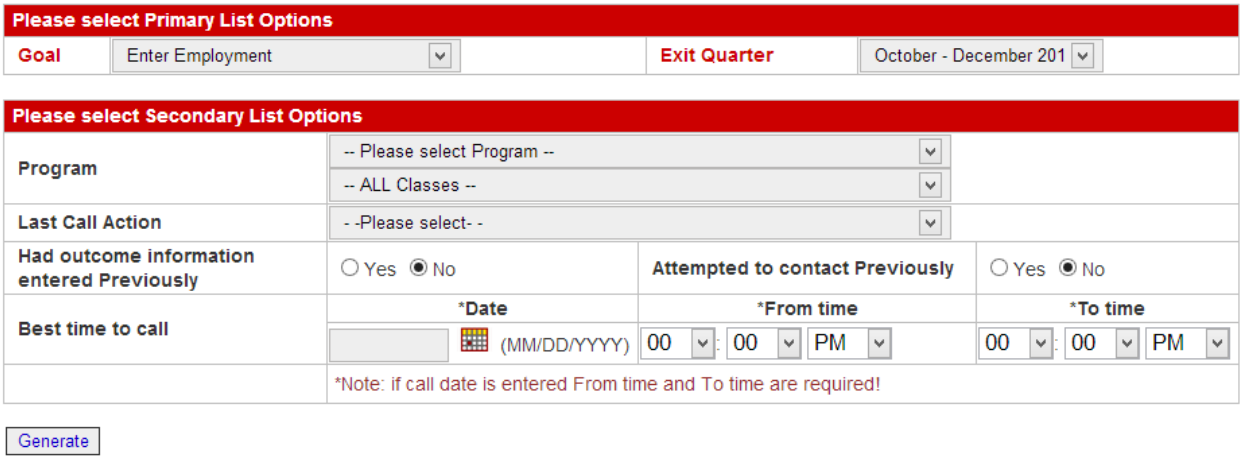
Select Outcome Call Lists from the Student Management section of the left hand navigation menu to access the feature.



Users with appropriate permissions may generate lists of students who meet the criteria to have outcomes verified:

- Student must have a minimum of 12 attendance hours
- be separated from the program and
- The separation fall in the NRS-approved window of time for which outcome data can be entered (see above).

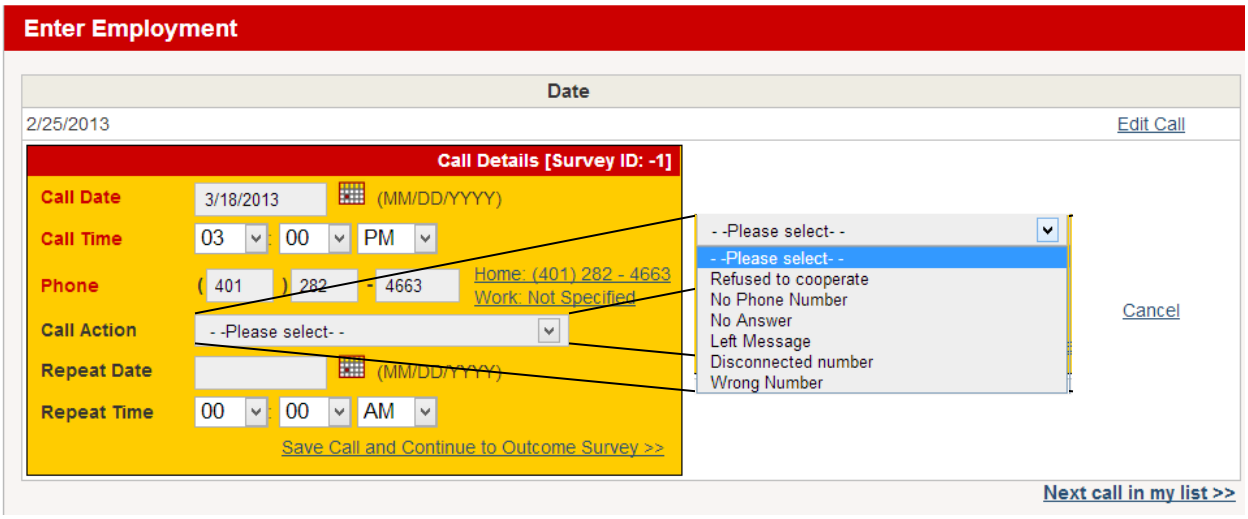
Outcome call lists can be filtered by a variety of factors, including the primary filters of goal and quarter of separation. Secondary filters include program, class, last call action, had outcome entry entered previously, contacted previously and best time to call.



Once the list is generated, users have the ability to enter outcome information for each student in the generated list. When a student outcome call is generated but no action is taken, users may choose from the following options:

- Refused to cooperate
- No Phone Number
- No Answer
- Left Message
- Disconnected Number or
- Wrong Number.

If desired, users can indicate a best time to call which will be used as a filtering mechanism for future list generation.



Should the user make contact with the student, the system will record the phone number used to reach the student and advance to a configurable script which allows the user to ask the student qualifying questions and proceed with the survey data.

The template for the call script was designed in accordance with requirements outlined in the Implementation Guidelines posted by the National Reporting Service.

You may select to have the survey presented in:

- English
- Spanish
- Portuguese

Language: English

Outcome Survey for: *Enter Employment*

Hello. My name is Tim Turner.

I'm calling on behalf of the Adult Education Program. I'm calling people who have recently attended classes in our adult education program. We want to know how you liked the classes you attended and how adult education classes have affected you, your family, and your job.

This short survey should take no longer than 10 minutes to answer and your responses are very important. Do you have time now for me to ask these questions? (Reassure the respondent that any information given to us will be strictly confidential.)

A_Enrollment

A-1	I understand that you were in the following classes about six months ago. Is that correct?	- -Please select- -
A-2	Are you presently attending an adult education program?	- -Please select- -
A-3	Is it the same adult education program?	- -Please select- -
A-4	Where is the class located?	
A-5	In what county is the program located?	

C_Employment

C-1	While you were taking the class did you get a paying job?	- -Please select- -
C-2	Since you stopped taking the class, have you gotten a paying job?	- -Please select- -
C-3	Do you still have the same job or do you now have a different job?	- -Please select- -

G_Closing

G-1 Is there anything that I didn't ask about that you'd like to say?

Thank you very much for taking the time to answer my questions. Your answers are very helpful. The information you gave me will be used to help make adult education programs better and more useful to people like you who have attended or would like to attend such programs.

Save Survey

Data collected from the survey is used to complete the appropriate fields in Federal Tables 5, 8, 9 and 10. Once the survey call has been completed, the Outcome Call List Module will advance directly to the next student in the call list without requiring re-generation.

NOTE: Students who achieve an outcome of Obtained Employment are automatically placed in the automatic cohort for Retain Employment and will appear on the Outcome Call List in the appropriate quarter for follow up.

NOTE: Students who achieve an outcome of Obtain a GED or Secondary Credential are automatically placed in the automatic cohort for Enter Postsecondary Education or Training.

Daily Call Logs

Daily call logs showing outcome calls made and results generated are automatically created and available to users with the appropriate system permissions and roles.

ROLLOVER STUDENTS

Students are allowed to roll from one fiscal year to the next. If a student is in the system and remains enrolled past June 30 of any fiscal year, the system does NOT require that the student be separated. Rules for Rollover Students are:

- Exiting EFL from one fiscal year is the entering EFL for the new fiscal. In other words, whatever overall EFL the student had on June 30, that becomes his entering EFL (for federal table purposes) for the fiscal that begins on July 1.
- Attendance hours (for federal table purposes) reset to zero at the beginning of the new fiscal. A student must have 12 hours in each fiscal year to appear on the federal reports.
- Any test taken after May 15 may be counted as the pre-test for the new fiscal year depending on state policy.
- In order to appear on the federal reports a student must have at least one test entered during the fiscal year. This includes the May 15 carryover test if permitted by state policy.
- The system will issue a "pending separation" for all students that will become effective June 30 should the student not be activated in the new fiscal year. If no new entries (attendance, assessments) are posted for the student by the cutoff date (typically established as a date in August or September based on state requirements) the student will be retroactively separated with an exit date of June 30.
- If a student is continued in the system by data entry (attendance, assessment) in the new fiscal, a prompt will require the submission of new fiscal data related to
    - Employment Status
    - Last Grade Attended status
    - Permission to Data Match

REPORTS

The system provides a number of easily accessible reports including a series of Federal Tables, a number of custom reports and an ad-hoc query reporting engine.

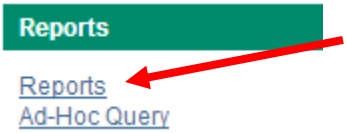
All users may not have access to reports. User access is determined at the state level and based on user permissions/roles.

All reports reflect the most current **approved** data at the time of generation.

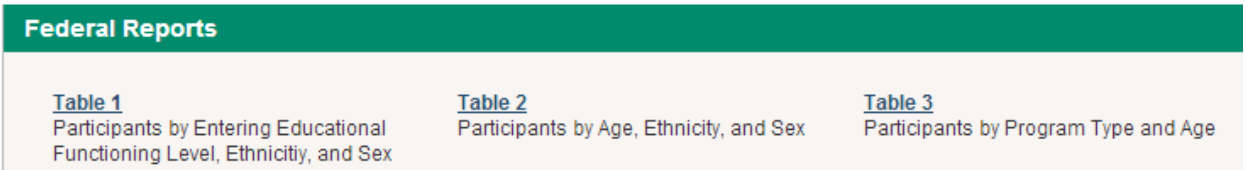
Reports can be exported to a variety of formats including Excel and PDF.

FEDERAL TABLES

The system provides a list of federal tables that can be generated at any time. Federal Tables and Custom Reports are accessible by selecting the Reports link in the Reports section of the left-hand navigation menu.



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



NOTE: The filtering option "Ignore Minimum Attendance Rule" allows reports to be generated without regard for the hours of attendance requirement.

Student Tables: Basic Requirements for Inclusion

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.

Federal Table Aggregation Rules

Federal Tables 1, 2, 3, 4, 4B, 5, 5A, 6, 8, 9, 10 and 12 are generated at the AGGREGATE level for students.

These federal Tables are designed to reflect the student's TOTAL participation in the Adult Education System.

If a Student is Enrolled in two different programs during a fiscal year, these federal tables will display the combined result for the student when EACH program generates the table.

As an example, assume John Q. Student was enrolled in Program A, pre-tested only and accumulated 2 hours. At the same time John Q. Student also enrolled in Program B, pre-tested and post-tested to achieve a completion and accumulated 34 hours.

When either Program A or Program B generates a Table 4, John Q. Student's record will include a completion and 36 hours of attendance.

NOTE: 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.

In the example above, if John Q. Student had been entered by Program A as an ESL Student at Level 5 on July 1, 2012 and then subsequently entered by Program B on September 2, 2012 as an ABE/ASE Student at Level 2, John Q. Students Entering EFL for aggregate federal table purposes is established as ESL Level 5.

Federal Table 4.1

Federal Tables 4.1 is not an actual federal table. It is a system-designed table that mirrors Table 4 but allows data to be generated at the Program Level.

In the example of John Q. Student above, a Table 4.1 will display information only as it pertains to each program.

Table 4.1 for Program A will show 2 hours and an Entering EFL of ESL Level 5. The Table 4.1 Report for Program A will show no completion.

Table 4.1 for Program B will show 34 hours of attendance and an Entering EFL of ABE/ASE Level 2. Table 4.1 for Program B will indicate a completion.

Student Tables: Table 4 Columns D and E

Also applies to Tables 4B, 4B.1, and 4C

Column D on Federal Table 4 indicates students who have completed a level. In the system, completions are generated by Assessment.

Column E on Federal Table 4 is a sub-set of Column D and indicates students who have advanced one or more levels. In the system, advances are generated by Hours Entry.

To Advance, a student MUST have one hour of attendance entered on or after the date of the assessment which triggered the completion.

Student Tables: Requirements For Inclusion On Table 5 And 5a

In addition to the four basic requirements for inclusion on federal tables, students must be separated from ALL programs in order to qualify for inclusion on Federal Tables 5 and 5A.

Student Tables: Inclusion On Table 6

Information entered in both the Student Demographic Module, Student Enrollment Module and Class Placement Module are used to populate the appropriate columns and rows on Table 6.

- Disabled: Populated by the designation of Learning or Physically disabled in the Student Demographic Module

Physically Disabled?	○ Yes ◉ No
Learning Disabled?	○ Yes ◉ No

- 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.

NOTE: The selection of any Correctional Facility Type in Student Demographics does NOT populate the student to the appropriate row on Table 6. It is the CLASS TYPE that populates those rows.

- 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.

Secondary Reasons

Primary: Vote or register to vote for the first time

Secondary: Leave Public Assistance

State Goals

Primary: - -Please select- -

Secondary: - -Please select- -

Recruitment

- -Please select- -

Staff Tables: Inclusion On Table 7

All system users who are active during a given fiscal year are included on Federal Table 7.

Inclusion on Table 7 is based on responses to data fields in the Employment Function block of the User Administration module.

Employment Information

* Primary Adult Ed Program	Red John
* Employment Function	Local Teachers
* Employment Type	Paid
* Employment Status	Full Time
Hourly Rate	0.00

Secondary Adult Ed Program Assignments

Teacher Certificate Information

Account Requires Certificate?	☑
* Certificate Expiration Date	12/31/2015 (MM/DD/YYYY)
Years of Experience	Less Than One Year
Types of Certificates	☑ Adult Education Certification ☐ K-12 Certification ☐ Special Education Certification ☐ TESOL Certification

Each user is counted once on Table 7 based on the Primary Program established in the Employment Function lock of the User Administration Module.

Total user certificates may exceed the number of Local Teachers as teachers may have multiple certifications.

Users appear on the report for only ONE program – the Primary Program set in the Employment Function block of the User Administration Module.

Student Tables: Inclusion On Table 8 (Optional)

In order for a student to be included on Federal Table 8 (Optional Table)

1. The student must be enrolled in a Family Literacy Program Type

   AND

2. Entered in classes which are designated as Family Literacy

Student Tables: Inclusion On Table 9 (Optional)

In order for a student to be included on Federal Table 9 (Optional Table)

1. The student must be enrolled in a WorkPlace Literacy Program Type

   AND

2. Entered in classes which are designated as Workplace Literacy

Student Tables: Inclusion On 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.

Student Tables: Inclusion On Table 12 (Optional)

In order for a student to be included on Federal Table 12 (Optional Table)

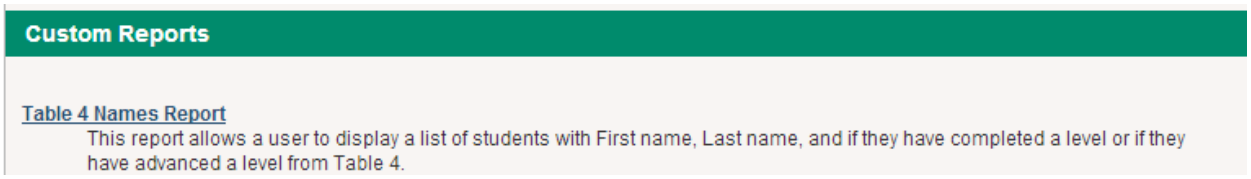
1. The student must be enrolled in a Work-based Project Learner Program Type

   AND

2. Entered in classes which are designated as Work-based Project Learner

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.

Table 4 Names And Table 5 Names

Table 4 Names and Table 5 Names reports display the students who appear on Federal Tables 4 and 5.

These reports allow the cross-referencing of the numbers listed on Table 4 and 5 with the actual students who make up those numbers.

AD-HOC QUERY ENGINE

The system provides an Ad-Hoc Query Engine that allows the creation of a virtually unlimited set of informational reports based on entry criteria for Students, Classes and Programs.

The Ad Hoc Query Engine is available by selecting the Ad Hoc Query link in the Reports section of the left hand navigation menu.

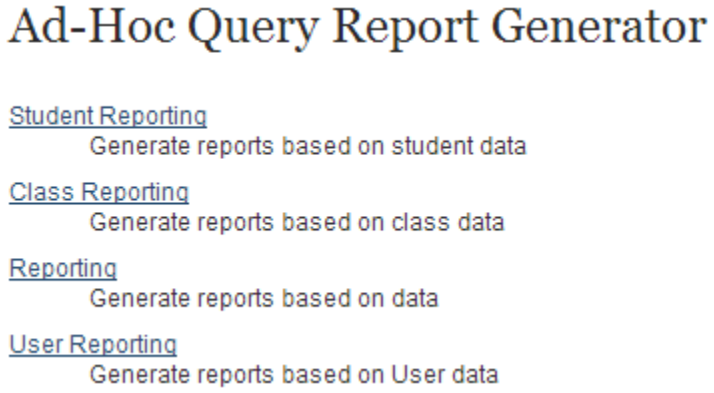
Reports, once generated, can be saved. Once saved the report filtering criteria is retained and the report can be run at any time from the Reporting Engine page.

Reports can also be made public, meaning that all users who have permissions to the Ad Hoc Query Engine will be able to run the same report from the same screen.

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

The Ad-Hoc Reports are divided in to 4 Main menus:

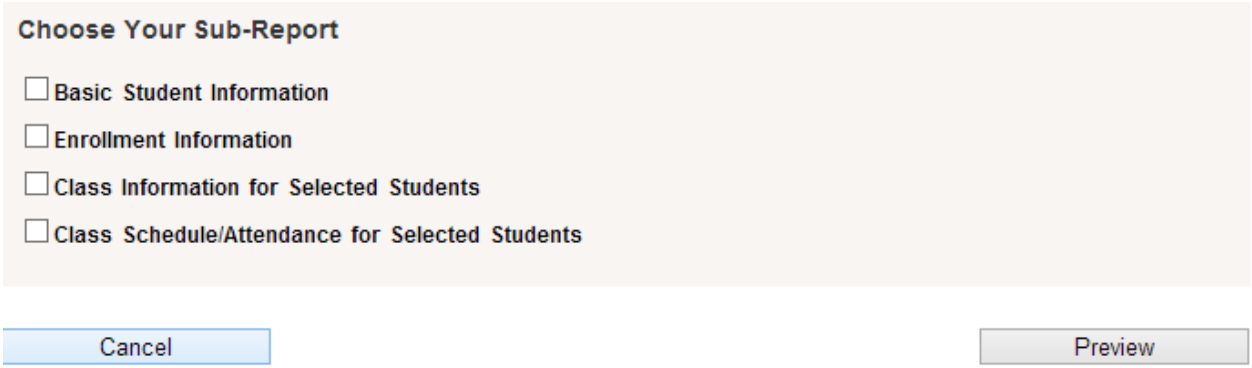
- Student Reporting
- Class Reporting
- Program Reporting
- User Reporting



Student Reporting

Student Reporting contains 4 Sub-Reports:

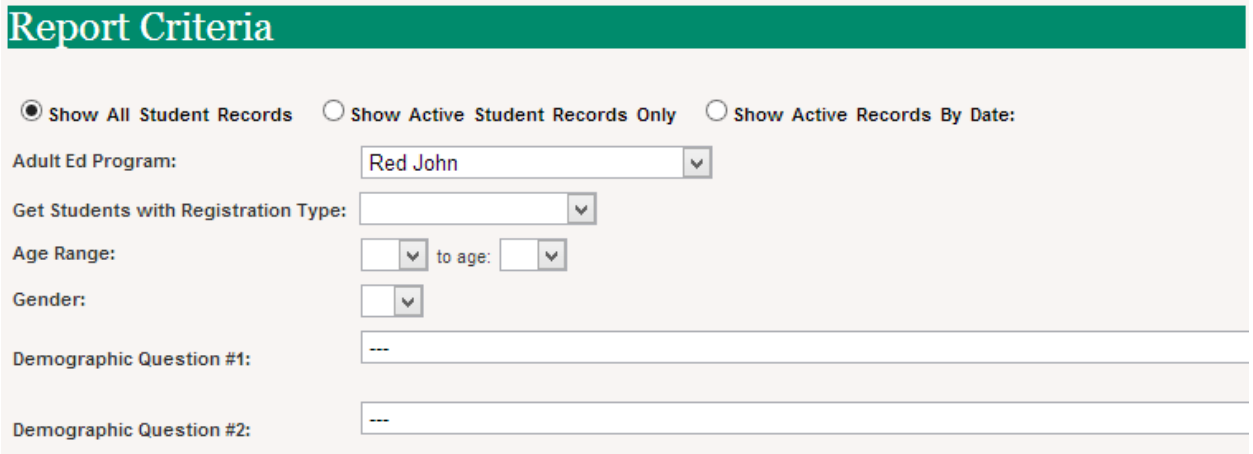
- Basic Student Information
- Enrollment Information
- Class Information for Selected Students
- Class Schedule/Attendance for Selected Attendance



You may select fields to include in your report from 1 or all of the Sub-Report. Click on the Sub-Report(s) you wish to include. (See Ad-Hoc Report Fields for a list of the available fields.)

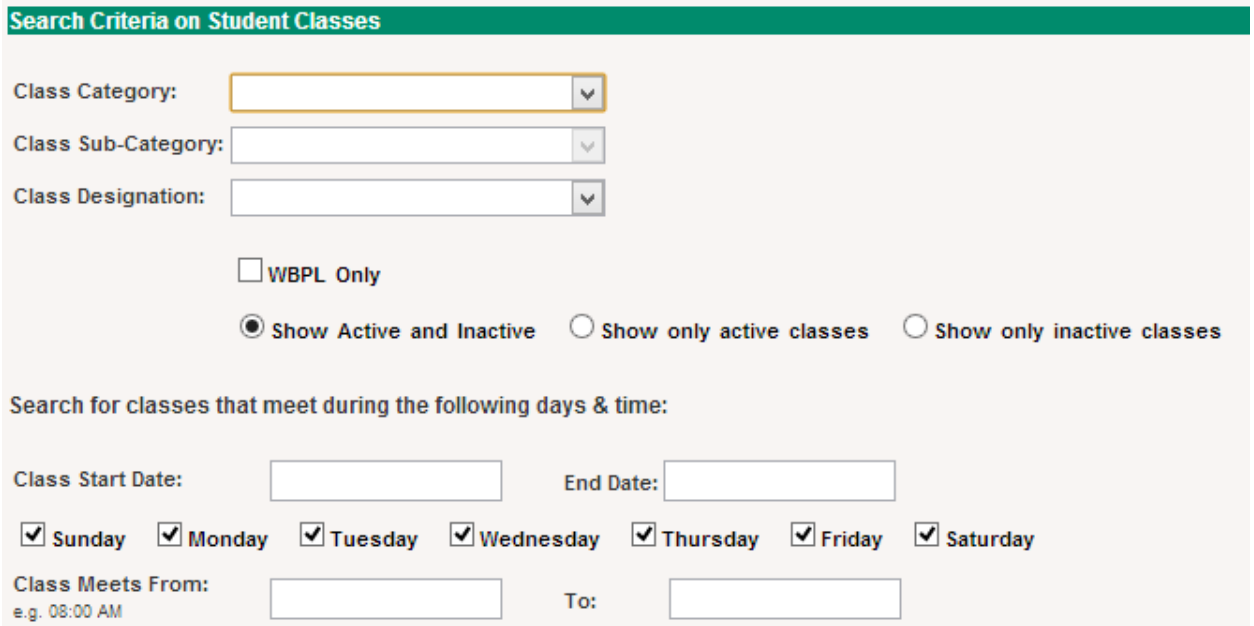
Regardless of which Sub-Report(s) you select, you will have the option to limit the results by the following criteria:

- Adult Ed Program (Limited by your Role)
- Registration Type
- Age Range
- Gender
- 2 Demographic Questions



If "Class Information for Selected Students" or "Class Schedule/Attendance for Selected Attendance" is selected you will also be able to limit the results by:

- Class Category
- Class Subcategory
- Class Designation
- Active/Inactive/Both
- Start / End Dates
- Meeting Days
- Meeting Times



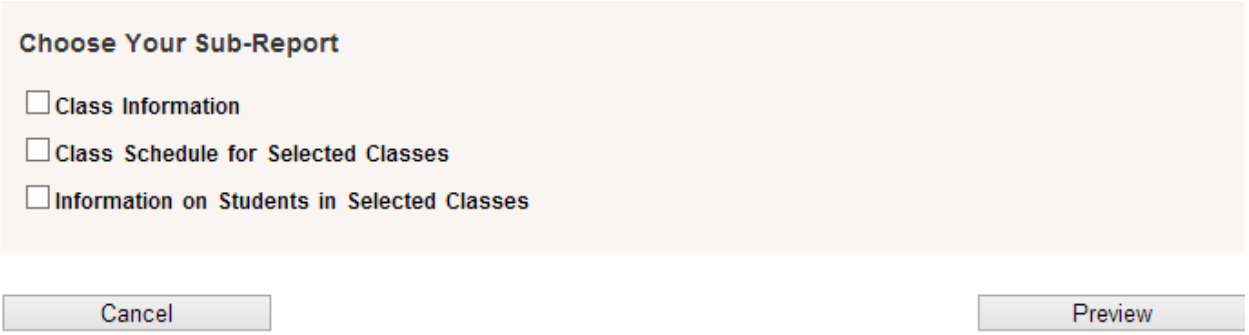
Once you have selected your Criteria and Report Fields click on "Preview" at the bottom of the page.

NOTE: The more data fields you select the longer the report will take to run. Also keep in mind that the larger your student population the longer the build time will be. Also, the best practice is to limit the Start and End Dates to a specific date range to speed up the build process.

Class Reporting

Class Reporting contains 3 Sub-Reports:

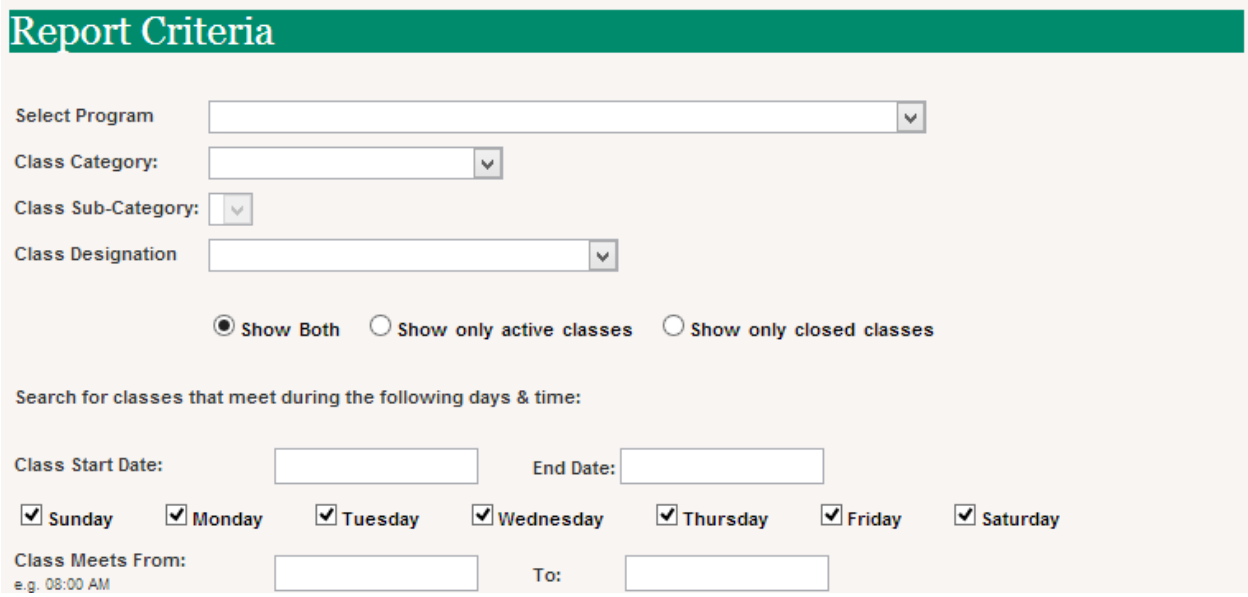
- Class Information
- Class Schedule for Selected Classes
- Information on Students in Selected Classes



Just as with Student Reporting, you may select fields to include in your report from 1 or all of the Sub-Report. Click on the Sub-Report(s) you wish to include. (See Ad-Hoc Report Fields for a list of the available fields.)

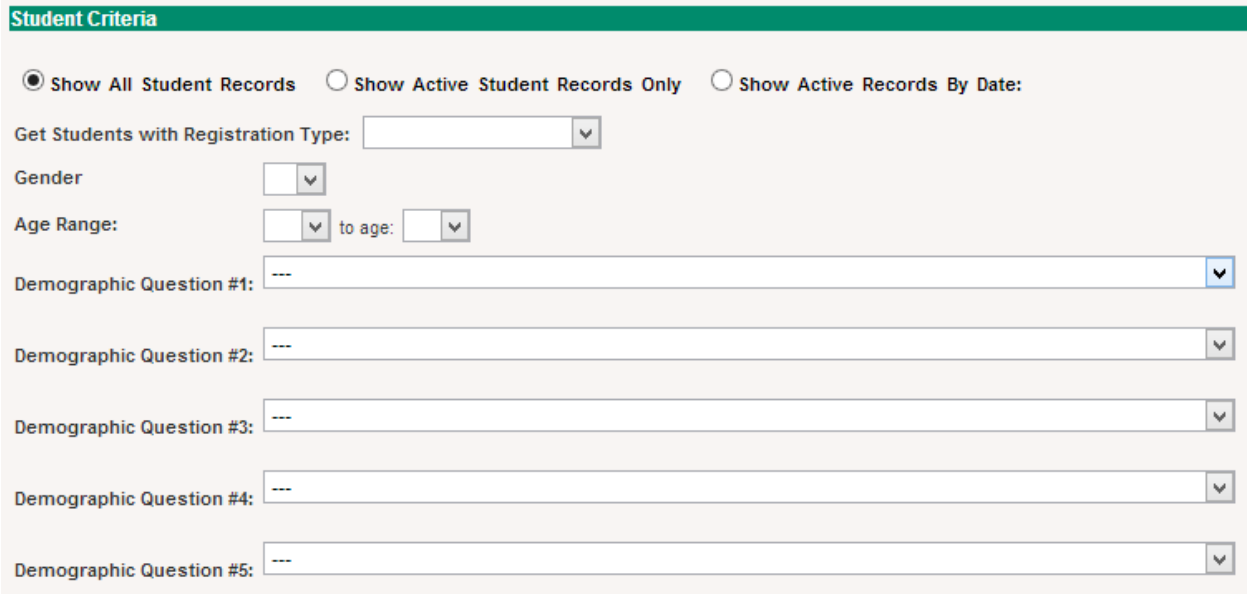
Regardless of which Sub-Report(s) you select, you will have the option to limit the results by the following criteria:

- Adult Ed Program (Limited by your Role)
- Class Category
- Class Subcategory
- Class Designation
- Active/Inactive/Both
- Start / End Dates
- Meeting Days
- Meeting Times



If “Information of Students in Selected Classes” is selected you will also be able to limit the results by:

- Registration Type
- Age Range
- Gender
- 5 Demographic Questions



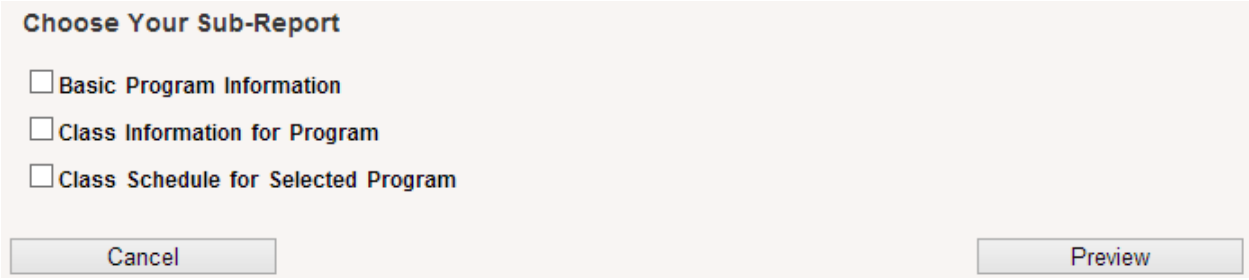
Once you have selected your Criteria and Report Fields click on “Preview” at the bottom of the page.

NOTE: The more data fields you select the longer the report will take to run. Also keep in mind that the larger your student population the longer the build time will be. Also, the best practice is to limit the Start and End Dates to a specific date range to speed up the build process.

Program Reporting

Program Reporting contains 3 Sub-Reports:

- Basic Program Information
- Class Information for Program
- Class Schedule for Program



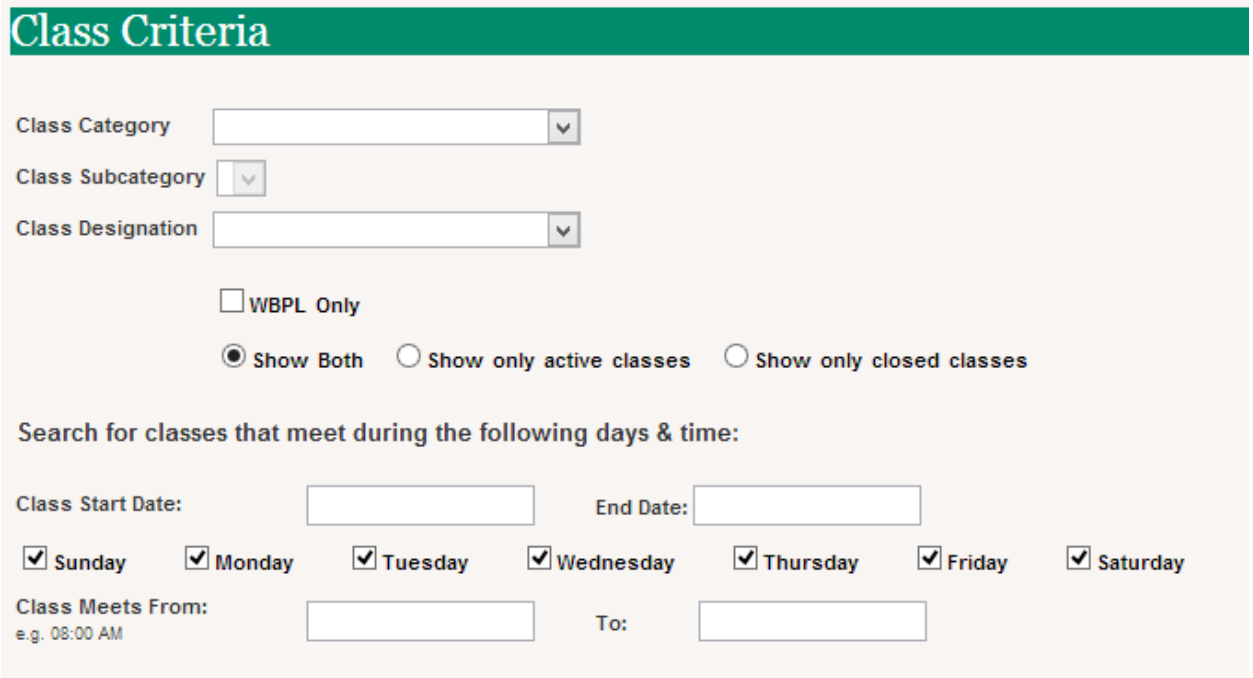
Just as with the other reports, you may select fields to include in your report from 1 or all of the Sub-Report. Click on the Sub-Report(s) you wish to include. (See Ad-Hoc Report Fields for a list of the available fields.)

Regardless of which Sub-Report(s) you select, you will have the option to limit the results by the following criteria:

- All/Active/Inactive Programs
- Specific Program

If "Class Information for Program" or "Class Schedule for Program" is selected you will also be able to limit the results by:

- Class Category
- Class Subcategory
- Class Designation
- Active/Inactive/Both
- Start / End Dates
- Meeting Days
- Meeting Time



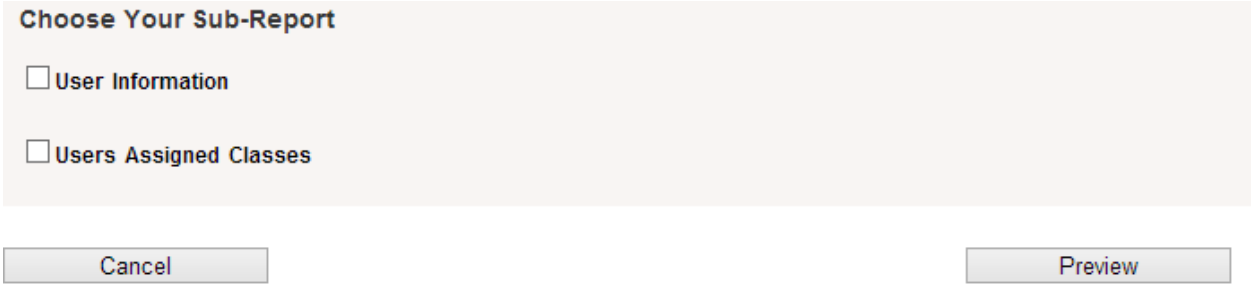
Once you have selected your Criteria and Report Fields click on "Preview" at the bottom of the page.

NOTE: The more data fields you select the longer the report will take to run. Also keep in mind that the larger your student population the longer the build time will be. Also, the best practice is to limit the Start and End Dates to a specific date range to speed up the build process.

User Reporting

User Reporting contains 3 Sub-Reports:

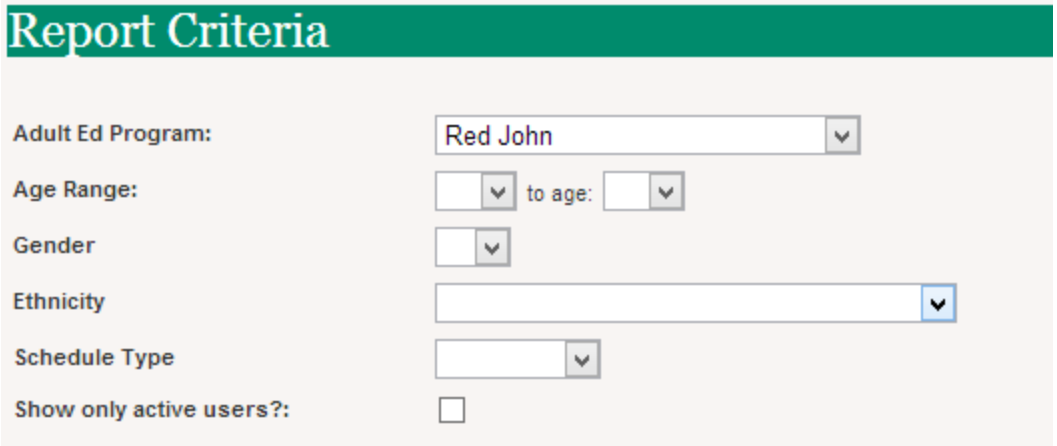
- User Information
- Users Assigned Classes



As before, you may select fields to include in your report from 1 or all of the Sub-Report. Click on the Sub-Report(s) you wish to include. (See Ad-Hoc Report Fields for a list of the available fields.)

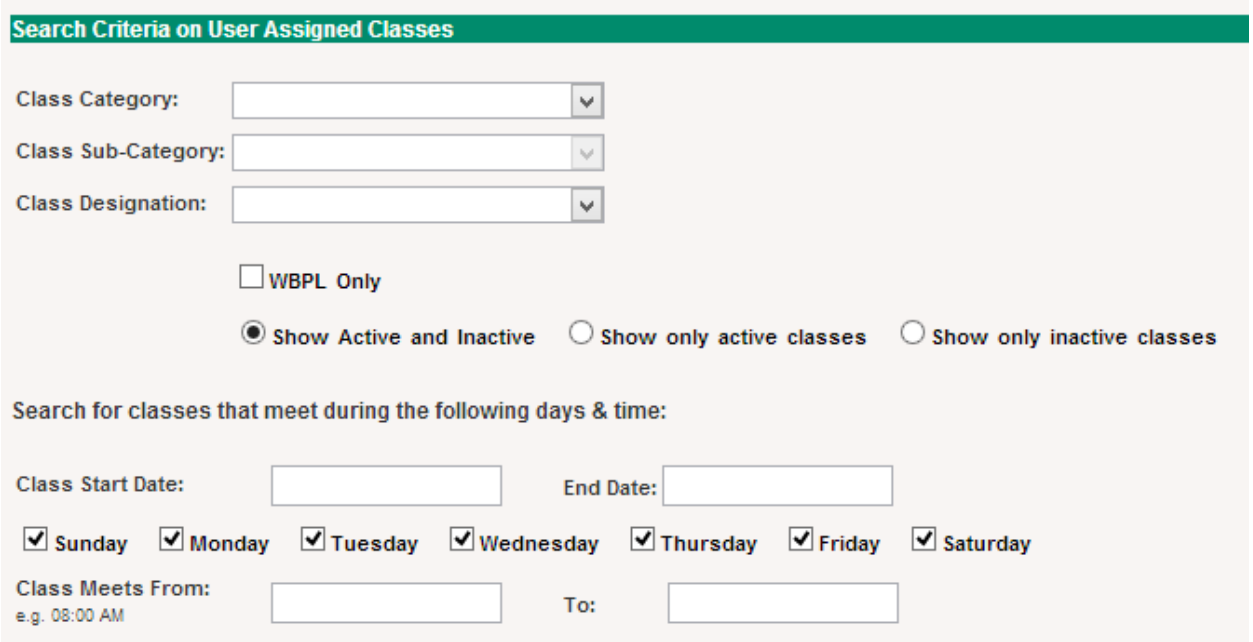
Regardless of which Sub-Report(s) you select, you will have the option to limit the results by the following criteria:

- Adult Ed Program (Limited by your Role)
- Age Range
- Gender
- Ethnicity
- Schedule Type
- Only Active Users



If "Users Assigned Classes" is selected you will also be able to limit the results by:

- Class Category
- Class Subcategory
- Class Designation
- Active/Inactive/Both
- Start / End Dates
- Meeting Days
- Meeting Time



Once you have selected your Criteria and Report Fields click on "Preview" at the bottom of the page.

NOTE: The more data fields you select the longer the report will take to run. Also keep in mind that the larger your student population the longer the build time will be. Also, the best practice is to limit the Start and End Dates to a specific date range to speed up the build process.

Ending the fiscal 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"

Before Separating a Student from the Program

- Review student Assessment(s) and Approvals
- Review Student Attendance and Approvals
- Approve all actions, anything not approved prior to separation will not be counted

Separate Student from the Program

All students who are no longer attending must be separated from the program.

- Check the Attendance Alerts and separate all students reflecting 90+ days since last attendance entered, <u>use last date of attendance for separation date.</u>
- Separate students who have 12 or more hours of attendance and do not have a beginning EFL (Pretest scores entered)

MANUAL OUTCOME ENTRIES

Manual Outcome Entry At Time Of Separation

- Click on "New Outcome Indicator" drop down box.
- Select proper outcome indicator. Page will blink after indictor has been selected.
- Click in box "Proper documentation for this outcome is available."
- Click "Save."
- Message will be displayed "One outcome indicator was successfully saved."

Manual Outcome Entry After Separation Date

- Click on Look up Students & Add new link in the navigation bar
- Enter search criteria to locate student
- Click on students name in the student snapshot box
- Click on the Outcome link in the student snapshot box
- Scroll down to Outcome Indicators
- Click on New Indicator on the right side of the page
- Enter date of goal achievement ***The date entered will be after the separation date***
- Click on "New Outcome Indicator" drop down box.
- Select proper outcome indicator. Page will blink after indictor has been selected.
- Click in box "Proper documentation for this outcome is available."
- Click "Save."
- Message will be displayed "One outcome indicator was successfully saved."

Cross Reference Table

Many data fields in the system directly impact the entry and display of data in other sections. The following chart is a guideline to illustrate the data fields and the modules each impacts.

USER MANAGEMENT	
Data Field	**Impacts**
Hourly Rate (optional)	*Contract in Class Creation Module* Hourly rate is used to create the teacher contract and establish the total contract rate for the class
Employment Function	*Table 7* Function, Type, Status and Years of Experience are used to populate the appropriate fields in Federal Table 7
Employment Type	
Employment Status	
Years of Experience	
Setting a User as a Local Teacher	Certificate Module Setting a user as a Local Teacher requires additional certification entry on the User Profile page.
CLASS MANAGEMENT	
Data Field	**Impacts**
Class Location	*Class Creation* Setting the Class Location establishes the address for the class and is required to create a class
Class Type	*Course ID* Data entered in the Class Type, Course Number, Section, Semester and Year fields establish the Course ID.
Course Number	
Section	
Semester	
Year	

Class Type	*Federal Tables 4C, 5A, 6, 10* Student placement in varying Class Types will determine the student's inclusion on select Federal Tables as well as the appropriate rows on Table 6 and 10.
Teacher Assignment	*User Roles* Setting a Teacher's Role on the Class Creation page will automatically assign the user that teacher role in the role management module.
Class Start and End Dates	*Attendance Entry Module* *Class Schedule Module* *Class Closing Reports* Class Start and End Dates are used to determine the range of available dates displayed in the Attendance Entry Module. Start and End Dates establish the class availability on the Class Schedule. Class Start and End dates determine inclusion on Class Closing Reports.
CLASS MANAGEMENT	
Data Field	**Impacts**
Fees	*Student Invoice/Billing* Class Fees are automatically applied to the student record upon placement in the class.
Class Meeting Dates/Times	*Attendance Entry Module* *Class Schedule* *Teacher Contract* Class Meeting Dates/Times are used to establish the available dates for entry of attendance hours. Class Meeting Dates/Times are used to build the Class Schedule. Class Meeting Dates/Times are used to calculate the Teacher

	Contract.
Minimum Enrollment	*Teacher Contract* Minimum Enrollment is displayed as part of the teacher contract.
STUDENT MANAGEMENT	
Data Field	**Impacts**
Is Data Matching	*Table 5, Table 5C* The "Is Data Matching" checkbox determines whether or not a student's information may be matched against external databases to determine if a student has achieved outcomes to be recorded on Table 5.
Enrollment Type	*Testing* *Demographic Data* *Federal Tables* Enrollment Type determines what data fields are required in the Student Demographic Process. Enrollment Type (in conjunction with Contact Type) determines what assessment batteries are available to the student. Enrollment Type determines whether a student will be considered for inclusion on all Federal Tables and may further impact his/her inclusion on Federal Tables 5A, 8, 9, 10 and 12
SSN/EIN	*Data Matching* SSN is required for certain data matching routines.
Contact Type	*Assessment and Leveling* Contact Type (ABE/ASE or ESL) determines what assessment batteries are available to a student.
Intake Hours	*Student Attendance* Intake Hours may be considered toward the NRS mandated 12 hours of attendance if state policy allows.

STUDENT MANAGEMENT	
Data Field	**Impacts**
Employment Status	*Table 5 Employment Outcome Measures* Students who have a Status of "Unemployed" for the fiscal year are automatically assigned the cohort measure of Enter Employment Students who have a Status of Employed (either Full or Part-Time) are automatically assigned the cohort measure of Retain or Improve Employment
Last Grade Completed Status (Both US and Non-US schooling)	*Table 5 Enter Postsecondary Outcome Measures* Students who have a Status of completing a High School Credential or Higher in either US or Non-US schooling are assigned the automatic cohort measure of Enter Postsecondary Education or Training
Class Placement Date	*Attendance Entry Module* Class Placement Date establishes the earliest date for which attendance in a given class may be entered for a student.
Ethnicity/Gender/Birth Date	*Federal Tables 1, 2, 3* Responses to the Ethnicity, Gender and Date of Birth questions in the student demographic module determine the corresponding slots in Federal Tables 1, 2 and 3.
PROGRAM MANAGEMENT	
Data Field	**Impacts**
Program Admin Assignment	*User Roles* Setting a Program Admin Role on the Program Creation page will automatically assign the user that teacher role in the role management module.
Funding Source (Optional)	*Class Creation* Class Funding Sources are determined by selections in the Function Source menu of the Program Creation module.

The Panic Room

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

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.

PANIC BUTTON SITUATION 3

STUDENT DOESN'T SHOW ON TABLE 5

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.

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:

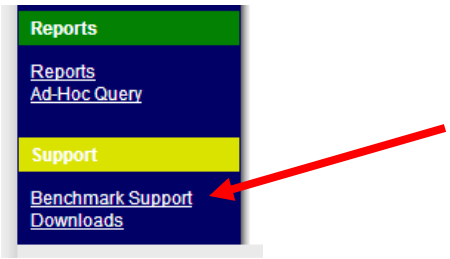
1) Navigate to the Change/Add Classes link for the student in the snapshot profile box.
2) Under the Class Placements is a list of each class in which the student is placed and the associated placement date.
3) Since no attendance has yet been entered, the DELETE option is available.
4) Delete the Class 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.

Even after ten years in the business of managing Adult Education student data, we still occasionally run across the odd scenario where something doesn't fit as expected. We will make every effort to resolve those as quickly as possible.

Using Support Tickets

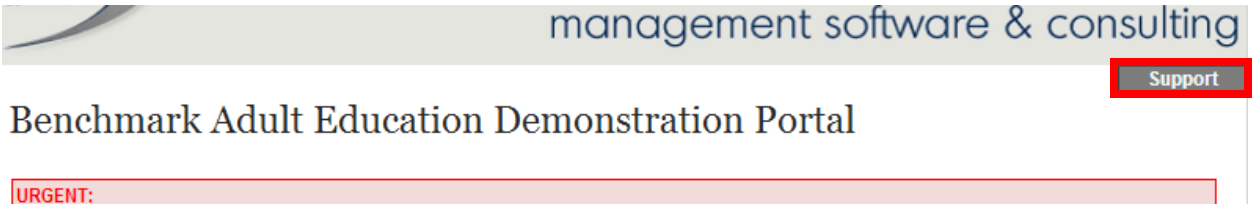
Getting the Most Out of the Support Ticketing System

https://benchmarkitsportal.ontimenow.com/login.aspx



Benchmark ITS and the State Administrators appreciate the effort all of you are putting in as you learn to work with ADVANSYS and also help us identify areas of the system that would benefit from enhancement.

Your use of the support ticketing system (which is available via a link in the left hand navigation menu) is a tremendous help to us in determining persistent issues and identifying topics which may need additional documentation or training. You may also submit a support request by clicking on the "Support" button which is at the top right of every page within ADVANSYS.



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 ADVANSYS (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 Park City 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 the 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 the 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 the State team and know that we take your requests seriously.

Glossary of Terms

Program - A program is a collection of classes held under the same authority. Programs can have multiple campuses and any number of classes. Programs can be defined by a variety of types

Class – A collection of students organized under a single instructor or multiple instructors. Can be a physical class where all students are in the same location, can be a group of students participating in a distance learning environment, can also be used to define interaction between single students and individual mentors.

Classes must have a type designation. This designation will determine how students enrolled in the class will be represented on select Federal Tables.

Class TYPE Designations may include:

- Community Corrections -- A community-based rehabilitation facility or halfway house
- Correctional Facilities – A prison, jail reformatory, work farm, detention center or any other similar Federal, State or Local institution designed for the confinement or rehabilitation of criminal offenders
- Distance Education (for NRS purposes) – Formal learning environment where students and instructors are separated by geography, time or both for the majority of the instruction period.
- EL Civics
- General Population
- Workplace Literacy
- Other at state discretion

Student – Learner who is or was enrolled in an Adult Education program. A student may have multiple enrollments within disparate programs and multiple placements in various classes, but the system strives to ensure that each student maintains one aggregate record for reporting purposes.

User – Anyone who has access to the ADVANSYS Adult Education System for the purpose of data entry or review.

- User Employment Information – Employment information is entered during the process of creating the user record in the system. Employment Information represents who the user is for Table 7 Purposes and has no bearing on what capabilities/access he or she may have to data in the system.
    - Employment Function determines how the user is represented on Federal Table 7. State policy determines how users should be represented. Functions include
        - State Level Administrative
        - Local Level Administrative (Program Administrator)
        - Local Teacher
        - Local Counselor
        - Local Paraprofessional
        - Non-State User (Not reported) – Function used to designate technical support users or other individuals who are not a part of the state adult education system, including politicians or others who might need view-only access.
- User Roles – The system allows for any number of permission specific roles to be created at the state level and assigned to individual users. Roles are assigned to individual users at the time they are entered into the system. These roles determine what each user is allowed to do. Other than state and system admin roles, each role is attached to a program and/or class. Users can see only information to the program'

  Typical roles created in the system are as follows, the actual capabilities assigned to each are at the discretion of the state administrators:
    - System Admin – Can perform any function in the system
    - State Admin – Can perform all functions necessary to manage the system at the highest level including data manipulation
    - Program Admin – Can perform all functions necessary to manage system data at the program level including data approvals.
    - Teacher – Can perform all functions necessary to manage system data at the individual class level including attendance entry, student demographic entry, etc.
    - Other roles can be created with any number of possible system access variables, including the ability to view data but make no entries or changes.

Enrollment – Entry of a student into an Adult Education Program Type. Students can be enrolled in any number Program Types in any number of Adult Education Programs. Students can be removed from Enrollment Types and added to Enrollment Types over the course of his/her participation.

Registration – Registration is established when a student enters an NRS program. The Registration Date is typically established as the date of first contact because all entries to the student record must occur on or after this date. A student may have multiple simultaneous registrations in different programs, but only one active registration in an individual program at a time.

Contact Type – For students on an NRS-tracked path, contact type is the designation that determines their assessment availability, establishes the baseline for their Educational Functioning Level and ties to their placement on Federal Tables. Contact type must be set as either ESL or ABE/ASE.

Class Placement – Students are PLACED in classes. Students may be placed in multiple classes. Class Placements can be managed over the course of a student's participation by adding students to class rolls, removing students from class rolls and transferring students between classes.

Separation – The act of exiting a student from the program. When a student is separated from the program a separation date and reason must be entered. The student cannot be re-enrolled in the same program on a date prior to that separation date. When a student is separated from the program, he/she is also automatically removed from all classes in that registration in which he/she may have been enrolled.

Separations are used to determine which students populate Federal Table 5.

Rollover Student - Students who progress from one fiscal year to the next without separating from the program. ADVANSYS does not require automatic separation at the end of the fiscal. When a student "rolls" from one fiscal year to the next the following calculations take place:

- Accumulated student attendance for Federal Table purposes is reset to zero as of July 1. All attendance is maintained, however, for review purposes.
- Entering EFL for the student is determined as the exiting EFL from the previous fiscal. For example if a student entered Fiscal 09-10 at Level 2 and advanced to Level 3 during the year, his ENTERING EFL for Fiscal 10-11 would be Level 3.
- Alerts transcend fiscal years. Attendance and Testing Alerts would remain in place based on hours and days spanning the fiscal.

EFL – Educational Functioning Level. By NRS definition this is established by the lowest score on a series/battery of assessments. In ADVANSYS, EFL is related to but separate from Level Gain for Federal Table Four purposes.

Last Action Taken - Shows the progression of the overall student EFL. Based on the entire battery of assessments. Possible Actions include:

- Entered – Student has a pre-test in the system that has established their Entering EFL for the purposes of Federal Table Four.
- Regressed a Level – The lowest score(s) on a post-test is below the entering EFL.
- Completed A Level – Student has achieved a post-test score that raises the lowest previous score(s) to a level sufficient to test into the next EFL.
- Advanced – Student has completed a level and had an hour of attendance entered on or after the date of the test(s) that triggered the completion.

Table Four Advance – ADVANSYS considers Table Four Advance independently from EFL completion/advance. Table Four Advance (noted by a color-coded status bar on the student profile) is determined on an individual assessment by assessment basis.

> Example: A student may enter the program and take CASAS Reading and CASAS Math pre-tests, scoring in Level 2 on each. On the subsequent post-tests the student may improve reading to Level 3 but Math remains at Level 2. This student's overall EFL would remain at Level 2, but due to the fact that he/she increased the Reading score by a level, the student would be credited with a completion for Table Four purposes.
>
> Exception: To be considered for a Table Four Advance the post-test score must be higher than the entering EFL. In the above example had the student's first post-test regressed to Level 1 and a subsequent test returned to Level 2, this would not qualify for a Table Four Advance.

Justification – Justification allows a test battery to be limited to specific areas.

> For example if a student were to work only on CASAS Math, the justification can be set to "Non-Traditional 1" and only a Math score entered. The only available post-test would then be Math. Traditional justification indicates that the full battery of tests will be used whether that be one, two (in the case of CASAS), or three (in the case of TABE).

Justification can be changed only after a pre and posttest has been entered.

Approvals – Select data entered in ADVANSYS must be approved by a supervisory user (typically one with program administrative permissions). This allows data to be checked for errors prior to being officially added to the system. Data that must be approved after entry includes:

- Registrations
- Profile Data Changes
  - Name
  - Address
  - ID Number
- Assessment Scores
- Attendance
- Outcomes (only those manually entered, not those imported via data matching)

Note: Approved data cannot be edited except by those given specific role permission to do so. Typically this is reserved for state-level administrative roles.

Alerts – Dashboard type reports that assist in decision-making. The system currently provides a number of alerts to provide pertinent information. Among the alerts in place are:

- Testing Alerts – Displays students who have accumulated X number of class hours without a test being entered. The number of hours is a variable determined by the state at the time of system deployment
- Attendance Alerts - Displays students who have accumulated X number of calendar days without attendance being entered. The number of days is a variable determined by the state at the time of system deployment.
- Enrollment Alerts - Displays students who are registered in the system but not enrolled in any classes.
- User Alerts – A messaging system that allows users to send messages to other users under their authority.
- Class Improvements – Lists each student in a class and displays the scores/attendance needed to achieve an EFL Completion or Gain.
- Certificate Alerts – Displays a list of users who have certification data entered and are X days from that certification expiring. The number of days is a variable determined by the state at the time of deployment.

Ad- Hoc Report Fields

Student Reports				
Student Information				
Basic Student Information				
Date of Birth	Gender	Name	SSN/EIN	
Student Residency Information				
City	County	State	Street Address	Zip
Student Contact Information				
Email Address	Home Phone	Personal Phone	Work Phone	
Education Information				
Date GED Test Taken				
Student Citizenship Information				
Ethnicity				
Educational Information				
GED Test Type	Passed GED?	State GED Taken	Took GED	
Program Information				
Enrollment Description	Enrollment Type			
Enrollment History				
Basic Student Information				
Date of Birth	Ethnicity	Gender	Name	SSN/EIN
Enrollment Information				
Approval Status	Intake Hours	Registration Date	Separation Date	
Educational Information				
Date GED Test Taken	GED Test Type	Passed GED?	State GED Taken	Took GED
Special Circumstances				
Receiving Wage				
Program Information				
Enrollment Description	Enrollment Type			
Miscellaneous				
Primary Indicators	Primary Reason	Primary State Goal	Secondary Indicators	Secondary Reason
Secondary State Goal	Selective Service Aware			

Student Reports (cont.)				
Student Classes				
Basic Student Information				
Date of Birth	Ethnicity	Gender	Name	SSN/EIN
Course Details				
Class Category	Class Description	Class Designation	Class Size	Class Subcategory

Credits	Name			
Teacher's Details				
Email Address	Name	Phone Number		
Class Location				
Building Assignment	City	County	Room Assignment	State
Street Address	Zip			
Class Fees				
Book Fee	Jet Rate	Lab Fee	Material Fee	Non-Resident Fee
Other Fees	Resident Fee			
Program Information				
Enrollment Description	Enrollment Type			
Miscellaneous				
Name	WBPL Status			
Student Schedule & Attendance				
Basic Student Information				
Date of Birth	Gender	Name	SSN/EIN	
Course Details				
Class Name	Course Number	Teacher Name		
Attendance				

Class Total Meeting Hours	Hours Attended	Meeting Days	Meeting Times
Program Information			
Enrollment Description	Enrollment Type		

Class Reports				
Class Information				
Course Details				
Active Status	Class Category	Class Description	Class Designation	Class Size
Class Subcategory	Course ID	Course Number	Credits	Minimum Enrollment Size
Name	Semester	Start & End Date	Term Year	
Teacher's Details				
Date of Hire	Education	Email Address	Name	
Class Location				
Building Assignment	City	County	Room Assignment	State
Street Address	Zip			
Class Fees				
Book Fee	Jet Rate	Lab Fee	Material Fee	Non-Resident Fee
Other Fees	Resident Fee			
Program Information				
Administrator	Name	Name		
Miscellaneous				
WBPL Status				
Schedule				
Course Details				
Active Status	Class Category	Class Designation	Class Subcategory	Name
Program Name	Start & End Date			
Class Schedule				
Meeting Days	Meeting Times			
Student Information from Selected Classes				
Basic Student Information				
Date of Birth	Gender	Name	SSN/EIN	Student Record Created
Student Record Created By				
Course Details				
Active Status	Class Category	Class Designation	Class Subcategory	Name
Program Name	Start & End Date			

Class Reports (cont.)				
Student Information from Selected Classes (cont.)				
Student Residency Information				
City	County	State	Street Address	Zip
Student Contact Information				
Email Address	Home Phone	Personal Phone	Work Phone	
Attendance				
Hours Attended				
Student Citizenship Information				
Ethnicity				
Special Circumstances				
Receiving Wage				
Miscellaneous				
Enrollment Description	Enrollment Type			

Program Reports				
Program Location & Contact Information				
City				
County	Email Address	Phone Number	State	Street Address
Zip				
Program Information				
Active Status	Administrator	Date of Hire	Description	Name
Class Information				
Course Details				
Active Status	Class Category	Class Description	Class Designation	Class Name
Class Subcategory	Course ID	Course Number	Credits	Start & End Date
Teacher's Details				
Date of Hire	Email Address	Name		
Class Location				
Building Assignment	City	County	Room Assignment	State
Street Address	Zip			

Program Reports (cont.)
Class Information (cont.)

Program Information

Name

Miscellaneous

WBPL Status

Class Schedules for Classes in Selected Programs

Course Details

Name

Class Schedule

Meeting Days | Meeting Times

Program Information

Name

User Reports

User Information

User Information

Date of Birth | Education | Ethnicity (long) | Ethnicity (short) | Gender

Name | SSN

User Residency

Address | City | County | State | Zip

User Contact Details

Email	Home Phone	Mobile Phone	Work Phone	
User Employment				
Date of Hire	Hourly Pay Rate	Payment Type	Work Schedule Type	
User Experience				
Certificate Expiration	User Certificates	User Certificates (Description)		
User Information				
Date of Birth	Date of Hire	Email	Ethnicity (short)	Gender
Name				

User Reports (cont.)				
User Statistics				
Course Details				
Class Category	Class Description	Class Designation	Class Size	Class Subcategory
Course ID	Course Number	Minimum Enrollment Size	Name	Semester
Start & End Date	Term Year			
Class Schedule				
Meeting Days	Meeting Times	Total Meeting Hours		
Class Location				
Building Assignment	City	County	Room Assignment	State
Street Address	Zip			
Miscellaneous				
Program Name	WBPL Status			

National Reporting System

A Project of the U.S. Department of Education

National Reporting System (NRS) 2012 Changes

Automatic Cohort Designation and New Measures

FREQUENTLY ASKED QUESTIONS

Entered Employment and Retained Employment

Entered Employment Cohort Definition: Learners who are not employed at time of entry and in the labor force who exit during the program year.

Retained Employment Cohort Definition: Learners employed at entry who exit during the program year; and learners who were not employed at time of entry and in the labor force, who are employed by the first quarter after exit quarter.

Q: How is "unemployed" defined? Does it include unemployed who have not looked for employment within the past four weeks?

A: The NRS Implementation Guidelines define "unemployed" as "*learners who are not employed but are seeking employment, making specific efforts to find a job and are available for work".* This definition does not include a specific time period in which the individual has looked for work.

Q: Are there any changes to the reporting timeline for the program year related to the employment outcomes?

A: No, the reporting timelines have not undergone changes. Entered employment is collected in the first quarter after the student's exit quarter and retained employment is collected in the third quarter after the student's exit quarter.

Q: Will the time lag for reporting employment result in having students who set the goal under the former system and students who are automatically designated in the new system both included in the reported measures for entered and retained employment?

A: Yes, due to the time lag in employment reporting, there will be old and new cohorts mixed in the reports for Program Years 2012 and 2013. Both goal setting and automatic cohort students will be

included for entered and retained employment in the tables for these years. States should not change the cohorts or follow-up procedures but should continue to follow both groups of students.

Q: Are States expected to update employment status during the year or at the time of exit and use that employment status to pull its tracking cohort or should employment status at entry be used for cohort definition?

A: States must use students' employment status at entry to determine cohort status for employment outcomes.

Q: How are students who are not seeking to enter employment to be reported?

A: Students who are not employed and are not seeking employment should be entered into NRS Table 6 as "not in the labor force."

<u>Obtain Secondary Credential</u>

Cohort Definition: All learners who take all General Educational Development (GED) tests, or are enrolled in adult high school at the high Adult Secondary Education (ASE) level, or are enrolled in the assessment phase of the External Diploma Program (EDP) who exit during the program year.

Q: What is the definition of adult high school?

A: An adult high school is a credit earning program sanctioned by State law, code, or regulation or Local Education Agency (LEA) authority that leads to a secondary credential.

Q: Students in adult high school earn a diploma through course credits (not GED tests). How do we place them in an Educational Functioning Level (EFL) and include them in the tracking cohort?

A: NRS Implementation Guidelines, Chapter II: *NRS Measure Definitions and Data Collection Methods* (pages 15 and 23) allow States to measure and report educational gain for adult high school students through the awarding of credits or Carnegie units. These adults may be placed in Low or High ASE based on the number of credits held upon program entrance as determined by State rules.

Students may be recorded as completing the Low ASE EFL by achieving enough credits or Carnegie units to advance from the 9th/10th grade level to the 11/12th grade level.

Students who enter the program meeting the State requirements for the 11th/12th grade level based on credits or Carnegie units should be placed in the High ASE EFL and are tracked for high school completion upon program exit.

Q: Is this cohort determined by EFL at entry or EFL at the end of the program year?

A: The cohort is defined by entry level EFL and only students who have exited the program are included in the cohort.

Q: Are all high ASE students in the cohort?

A: No, only high ASE students in adult high schools are in this cohort.

Q: Must a student pass all GED tests to be included as achieving the outcome?

A: Yes, students must pass all GED tests to be included as achieving the outcome.

Q: My State uses a score that is higher than the GED Testing Service recommended passing score to issue a high school equivalency diploma. Can we use that to define passing?

A: Yes, the score a State uses to issue a high school diploma or equivalency should be used to report high school completion in the NRS.

Q: Do students have to still be enrolled when they take the tests?

A: No, students are included in the cohort if they take all five tests before the end of the reporting period (December 31) for the program year in which they exit.

Q: Will States get credit for a student passing all five tests if this is done through multiple GED testing over the reporting period? In other words, if an enrolled student takes the GED test one time, passes three of five tests and then tests again and passes the other two tests (i.e., takes all 5 GED tests) does that student count for GED completion?

A: It doesn't matter if a student passes all five GED tests at one time or during the course of repeated attempts. As long as a student exits and passes all five tests before the end of the reporting period, the State can count that outcome.

Q: Are students who failed GED tests and retake them included in the cohort if they take them prior to the end of the reporting period?

A: Yes. Students who retake the tests should be included, as long as they meet all other requirements for the cohort.

Q: Is it possible to separate the reporting of the measure into two parts – such as all learners who are enrolled in adult high school at the high ASE level OR all learners who have attempted the State administered High School Exit Exam?

A: NRS reporting does not require or provide a mechanism to separate such categories of students. States may elect to separate these categories for State purposes.

Q: Are 12 hours required for GED reporting?

A: Yes. The 12 hour rule is unchanged. Only students who have 12 or more contact hours are included in NRS reporting.

Q: Are States required to enter GED scores to show attainment of the outcome?

A: No, States are not required to enter GED scores. The NRS does not provide a mechanism for such reporting.

Q: How should we indicate attainment of a GED, EDP, or secondary school credential or diploma if not through the actual test scores?

A: Attainment of a secondary credential should be determined by the issuance of the actual credential.

Q: Does the student need to earn the secondary credential after program exit? In other words, does this mean that the date of the final GED test has to be after the exit date of the student?

A: No, the GED test date could be before or after program exit. However, in order to include the student in the NRS tracking cohort for high school completion, the student must have exited the program.

Q: Can a student be in both adult high school and adult education simultaneously? How about EDP and adult education? Or EDP and GED?

A: To be counted in the NRS, a student must have at least 12 hours of instruction in an adult education program. States should determine their policies for dual enrollment in adult education.

Enter Postsecondary Education

Cohort Definition: All learners who have earned a secondary credential while enrolled, hold a secondary credential at entry, or are enrolled in a class specifically designed for transitioning to community college, who exit during the program year.

Q: Is a student with a secondary credential from a foreign country (e.g., an ESL student) included in the cohort for postsecondary education?

A: Yes, students with secondary credentials earned in other countries must be included in the tracking cohort for entrance into postsecondary education.

Q: Can students self-report having a secondary school credential, GED, or high school diploma? Should the program verify that a learner has a secondary credential or is this issue the same as the student self-reporting their employment status at entry?

A: Secondary credential is self-reported by the student. Verification is left to State or local policy.

Q: Are students who are co-enrolled in both adult education and postsecondary education (such as an I-BEST model) included in the postsecondary follow-up cohort?

A: Any student, who at exit holds a diploma or was enrolled in a transition class as designated by the State, is included in the follow-up cohort for entrance into postsecondary education.

Q: If a student exits in a program year and begins postsecondary education in that year, and is also enrolled in postsecondary education the following year, should the student be counted in both years since the tracking is over a 2-year period?

A: No, the student is counted only once. The reported count must be unduplicated.

Q: How is a transition class defined?

A: A transition class is a class that has a specific purpose to prepare students for entry into postsecondary education, training or an apprenticeship program.

Q: Will the Office of Vocational and Adult Education (OVAE) provide a more comprehensive definition of a class specifically designed for transitioning?

A: No, but the definition of a transition class can be further refined by the State.

Q: Please clarify multi-year reporting of entry into postsecondary education.

A: States may report entry into postsecondary education to the end of the second program year after a student's exit year. In other words, students who exit during a program year may enter postsecondary education any time from exit through the end of the following program year (June 30). This means States can follow students and report for two years, in two rows on NRS Table 5. An unduplicated count is required.

Q: With multi-year reporting, it appears that survey States will need to survey students twice. This will cause an undue burden on survey States. Please provide additional clarification on the second year cohort to follow-up for survey States.

A: The extra time provided by these changes is intended to allow States to include students who take a longer time to enter postsecondary education or are harder to reach. States do not have to survey each student twice but should contact those students again that have not been successfully reached in the first year period or who have not had sufficient time to enroll in postsecondary education.

Cross-Cutting Questions on Cohorts and Goals

Q: Are programs supposed to re-identify cohort membership for students continuing in the next program year?

A: Yes, at the start of the program year, employment and secondary credential status should be updated for continuing students. However, the student is only counted in the cohort at exit.

Q: Should we no longer determine student goals now that NRS has moved to automatic cohort designation and no longer requires goals for the follow-up measures?

A: Although student goals are no longer required for NRS reporting, program staff should continue to set goals with students and help students achieve them, as part of good instructional practice.

Student Education and Highest Grade Level Completed

Q: How many hours, days, weeks or months of instruction constitute a grade level if the education system of the country of non-native students does not use grade levels?

A: Years of schooling should be used as grade levels.

Q: How do you count a student who only attended kindergarten?

A: Report kindergarten only as no schooling**.**

Q: How do we report education of learners who studied in both U.S. and non-U.S. schools?

A: Report the highest grade completed, whether in the U.S. or abroad. NRS Table 6 has a separate column for U.S. and non-U.S. schooling. The appropriate column should be used.

Q: How do we report education for students who were home schooled?

A: Home school students should be reported using the grade level equivalent consistent with State policy.

Q: Some students may be home schooled in a family trade. Does this constitute an alternative credential?

A: A credential must represent basic education and be conferred by an institution of learning (not from home). Home schooling in a trade devoid of academics may not count as a "grade" or as an "alternative credential."

Q: What qualifies as "some college, no degree" in non-U.S. schools that may have different systems than the U.S.?

A: If a student attended a postsecondary institution, it would be considered "some college." If a credential is awarded upon completion, it would count as a degree.

Teacher Experience and Credential

Q: Does teacher experience include all teaching experience or only adult education?

A: States should report only years of teaching experience in adult education.

Q: How are full-time and part-time defined?

A: States may develop their own definitions for full-time and part-time teaching status.

Q: What counts as a credential for teachers?

A: States should report only State recognized teacher credentials.

Q: How can you report teachers' education, such as a master's degree or a doctorate in education?

A: The NRS does not require reporting of teacher education. Only certification is reported.

Q: Should States report teacher experience and credentials at the beginning of the year, end of the year, or update this information during the year?

A: States should report teachers' experience and credentials at the beginning of the program year and update this information at the start of each year.