

WSIPC Guide to Advanced Features

TERMS OF USE

The information contained herein is licensed, trade-secret and proprietary and may not be used, disclosed or reproduced without permission of the licensing authorities, WSIPC and/or Skyward, Inc. As a condition of use, the User agrees to protect and keep the information from disclosure or falling into the public domain. The failure to comply with this agreement may result in the immediate termination of the User's right to access the information.

COPYRIGHT

© Copyright 2014 by WSIPC. All rights reserved.

Reproduction of any part of this manual in any medium without the express and written permission of WSIPC is prohibited by law.

This edition is printed in the United States of America. The contents may be corrected or modified by revisions without prior notice. Pages may be added, deleted, or changed as required.

The WSIPC logo is a registered trademark of WSIPC.

Skyward® is the registered trademark for Skyward, Inc. located in Stevens Point, Wisconsin.

What do you think about this guide? We'd like to hear from you!

Your feedback helps us to improve our Guides and learning materials for you. To leave feedback, <u>click here</u>.

Contents

Contents	i
About This Guide	1
What You Should Know Before You Start	2
Be Sure You're Signed In	2
How to Use This Guide	2
Navigation Paths	2
Getting Around	2
Screen shots	
What is in a WSIPC Guide	
What's New in This Edition	3
Using Automated Emails	4
Creating an Auto Email	
Previewing an Auto Email	
Cloning an Auto Email	
Editing an Auto Email	12
Editing Student Ranges on an Auto Email	12
Deleting an Auto Email	13
Managing System Contacts	14
Adding or Editing a System Contact	
Deleting System Contacts	
Using Student Indicators	
Understanding How Student Indicators Are Displayed	
Adding a Student Indicator	
Understanding Available Codes Selection	
Editing a Student Indicator	
Deleting a Student Indicator	
Using Processing Lists	29
Using Message Center	30
Using Skylert	31
Using Transcript Signature	32
Using the Address Module	

Using the Address Master	33
Adding or Editing an Address	34
Deleting an Address	37
Using the Mailing Address Master	38
Editing a Mailing Address	38
Deleting a Mailing Address	39
Accessing Address Reports	39
Address Range Defaults Report	39
Student Address Mismatches Report	40
Configuring Codes in the Address Module	40
Using Configuration Options	42
Accessing Address Utilities	43
Punctuation Removal	43
Right Justify	43
Mass Removal of Unused Mailing Addresses	44
Mass Address Change	44
Street Name Standardization	48
Duplicate Address Merge	50
Unused Address Deletion	51
Clone Address Paths	51
Import ZIP Codes	51
Using Address Range Utilities	51
Using Entity Counts	. 52
Accessing the Entity Counts Screen	
Managing Individual Grad Year Records	
Accessing the Entity Counts Report	
Running Entity Counts Utilities	
Clone Max Counts	56
Recount Students	56
Using the Name Maintenance Module	57
Accessing the Name Maintenance Screen	
Working with the [Name Type] Browse Records	
Adding a Name Record	
Editing a Name Record	
Changing a Name Record's Format	
Deleting a Name Record	
Removing Name Types from a Name Record	
Editing Addresses and Mailing Addresses	
Viewing Address History	
Configuring Name Maintenance Codes	
	1

Contents

Appendix A - Event Types and Event Triggers	
Using the District Calendar	79
Upper and Lower Case Utility	76
Mass Create Email Addresses Utility	73
Running Name Maintenance Utilities	73
Duplicate E-Mail Addresses Report	
Address Change Report	73
Name Suffix Report	72
Running Name Maintenance Reports	72

About This Guide

Advanced Features include modules and areas that help you to maintain information in Skyward's School Management System. Some modules, such as Name Maintenance, impact other modules throughout Skyward's School Management System. For example, when you update the email address for a guardian through Name Maintenance, other modules that show or use the email address (such as Email Notifications in Family Access, Attendance, and Grading) are also affected.

The following modules and areas in Advanced Features are explained in this Guide:

- Automated Emails Allows you to configure emails that are automatically sent to specific recipients based on pre-defined events.
- System Contacts A way to set up staff as a point of contact when using the "Contact Us" links found throughout Family and Student Access.
- **Student Indicators** How to configure Entity-specific indicators that are attached to student records based on criteria that you specify.
- Address Allows you to create and maintain Address records that are attached to students and their families.
- Entity Counts How to view and update counts of students who are enrolled in your Entity.
- Name Maintenance How to manage Name records used in Student Management.

What You Should Know Before You Start

You'll find that this Guide is much more helpful if you have a clear understanding of your district's business practices as related to changes that affect the entire district.

Be Sure You're Signed In

This Guide is intended to be read while you are working in Advanced Features, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.

How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button in the menu bar on the left side of the screen.

Screen shots

You'll find screen shots throughout the guide to help you learn how to use the software. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

What is in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
This Guide has been updated to reflect WSIPC's November 2014 software release version 05.14.10.00.03.	N/A
All dates have been updated to reflect the 2014-2015 school year.	N/A
Added "Understanding Available Codes Selection" sub-section	<u>24</u>
Added "Using Processing Lists" section	<u>29</u>
Added "Using Message Center" section	<u>30</u>
Added "Using Skylert" section	<u>31</u>
Added Using Transcript Signature" section	<u>32</u>
Added "Accessing the Name Maintenance Screen" section	<u>58</u>
Added "Working with the Name Browse" section	<u>61</u>
Added "Using the District Calendar" section	<u>79</u>

Using Automated Emails

The Automated (Auto) Emails area in Advanced Features allows you to automatically send an email to selected recipients when a specific event occurs. For example, you can send an automatically-generated email to an advisor and attendance secretary when a new student enrolls in your Entity. The email that is sent is called an Auto Email. You can configure Auto Emails that apply to many different areas of Skyward's School Management System.

You can view all Auto Emails that have been configured for the district (if at Entity 000) or for an Entity (if at a specific Entity).

NoteSome Email notifications that are enabled in Family Access will
also display in the Automated Emails screen. To identify these, the
Email Description begins with "Family Access Notifications..." and
may include Attendance, Grading, and Food Service notifications.

Creating an Auto Email

You can create an Auto Email from either the district level (Entity 000) or from an individual Entity. When you create an Auto Email, you specify the Event Type that the Auto Email is related to, such as Demographic Changes or Enrollment Changes. Once you select an Event Type, you can then choose from a list of available Event Triggers (changes in the software that trigger the Auto Email to be sent). Finally, you specify the recipients of the email and the content of the email message.

When creating an Auto Email, you also select a range of students for which the Auto Email should be sent. When you create an Auto Email from Entity 000, you configure the range options as part of the Auto Email creation process. The ranges can include students from multiple entities. If you create an Auto Email record from an individual Entity, you first create the Auto Email record, and then edit the Auto Email record to configure the range options separately. An Auto Email created from an individual Entity only includes students in that Entity in its range.

To create an Auto Email:

- 1. Go to Student Management\Advanced Features\AF\AE.
- 2. Click Add.
- 3. Configure the Automated E-mail Maintenance screen (Figure 1). Table 1 describes the options on this screen.
- 4. Do one of the following:
 - If creating the Auto Email from Entity 000, click Next.
 - If creating the Auto Email from an individual Entity, do the following:
 - a. Click Save.
 - b. Locate your Auto Email in the list and expand its record.
 - c. Click Edit Student Ranges.
- 5. Configure the Student Ranges screen (Figure 2). Table 2 describes the options on this screen.
- 6. Click Save.

-mail Setup											lext	
	E-mail Event Typ	e: Discipli	ne Referrals							¥	ack)
	Triggers an E-m									¥		
	^e E-mail Description	on: Discipline F	Referrals - Any R	eferral Issued								
Autom	nated Event Stat	us: Active	○ Inactive									
Message Recipie	nts											
Student Conta	acts Cl	ar	General S	itaff	Clear	s	ystem Contacts	Clea	ar			
Advisor			Contacts			DISCIPL	INE					
Case Manager					<u> </u>							
Principal												
Student's Discir	oline Officer											
Student's Discip	pline Officer	~			~				~			
Student's Discip	pline Officer	~			~				~			
Student's Discip Message Compos		~			V				~			
	sition				~				~			
Message Compos Priority:	sition		Assigned To <s< td=""><td>tudent Full N</td><td>lame></td><td></td><td></td><td></td><td>~</td><td></td><td></td><td></td></s<>	tudent Full N	lame>				~			
Message Compos Priority: * Subject:	sition High	rral Has Been ral has been e	-			signed to <st< td=""><td>udent Full Nam</td><td>e>:</td><td>~</td><td></td><td></td><td></td></st<>	udent Full Nam	e>:	~			
Message Compos Priority: * Subject:	sition High A Discipline Refe A discipline refer	rral Has Been ral has been e	-			signed to <st< td=""><td>udent Full Nam</td><td>e>:</td><td>~</td><td></td><td></td><td></td></st<>	udent Full Nam	e>:	~			
Message Compos Priority: * Subject:	Righ A Discipline Refe A discipline refer <offense descri<="" td=""><td>rral Has Been ral has been e ption> </td><td>-</td><td>ense Referred</td><td></td><td>signed to <st< td=""><td>udent Full Nam</td><td></td><td>~</td><td></td><td></td><td></td></st<></td></offense>	rral Has Been ral has been e ption>	-	ense Referred		signed to <st< td=""><td>udent Full Nam</td><td></td><td>~</td><td></td><td></td><td></td></st<>	udent Full Nam		~			

Figure 1 - Automated E-Mail Maintenance screen when creating an Auto Email from Entity 000

AREA	PURPOSE OF AREA
E-Mail Setup	Contains basic information about the Auto Email.
Options in This Area	Description of Options
	Identifies the area of the software or type of event that is referenced by the Auto Email. Auto Emails are categorized by E-Mail Event Type (referred to in this Guide as an Event Type).
E-Mail Event Type	You cannot change the Event Type once the Auto Email is created.
	For a complete listing of all Event Types and Event Triggers, see " <u>Appendix A - Event Types and Event</u> <u>Triggers</u> " (page 80).

Options in This Area	Description of Options
	Changes made to data that result in an Auto Email being sent. Each Event Type has one or more Event That Triggers an E-Mail (referred to in this Guide as Event Triggers).
Event That Triggers an E-Mail	For example, the Event Type Current Year Schedule Changes has several possible Event Triggers, including Class is Added and Class is Dropped.
	You cannot change the Event Trigger once the Auto Email is created.
	For a complete listing of all Event Types and Event Triggers, see " <u>Appendix A - Event Types and Event</u> <u>Triggers</u> " (page 80).
E-Mail Description	Identifies the Auto Email on the Automated Emails screen. The E-Mail Description must be unique under each Event Type.
Automated Event Status	Activates or inactivates the sending of the Auto Email.
AREA	PURPOSE OF AREA
Message Recipients	Allows you to select the recipients of the Auto Email.
Options in this Area	Description of Options
Student Contacts	Student Contacts are roles that Entity staff and guardians play in direct relationship to the student, at the time the email is triggered and sent. Examples of Student Contacts are Advisor, Homeroom Teacher, IEP Manager (if student is in Special Education), and Guardian 1/Primary Guardian of Family 1. For example, if you select Student's Current Term Teachers under Student Contacts, the email will be
	sent to all of the student's current teachers (as of the

Options in This Area	Description of Options
General Staff	Allows you to select specific Staff members, from the Staff table to receive the Auto Email.
System Contacts	System Contacts for the Entity. To learn more about System Contacts, see " <u>Managing System Contacts</u> " (page 14).
AREA	PURPOSE OF AREA
Message Composition	Allows you to configure how the Auto Email appears to the recipient.
Options in this Area	Description of Options
Priority	Specifies a Priority to be attached to the email. If supported by the recipient's email program, a Priority marker may appear with the email. For example, Microsoft Outlook marks messages that have high Priority with a red flag icon.
Subject	The subject line of the email. This box is automatically populated according to the selections you make for Event Type and Event Trigger, but you can change or customize it.
Body	The body of the email. This box is automatically populated according to the selections you make for Event Type and Event Trigger, but you can change or customized it.
Pre-Defined Fields	Selected information that is pulled from the software to include in the email. The Pre-Defined Fields available for selection vary according to the Event Type and Event Trigger that you choose. You can insert Pre-Defined Fields into the Subject and/or the Body of your message.
Preview E-mail	Displays the email as it will appear when it is sent out.

Options in This Area	Description of Options
Reset Subject/Body	Resets the Subject and Body boxes to the default values. Any changes you have made are lost.

Table 1 - Options available on the Automated E-Mail Maintenance screen

Automated E-mail Maintenance		6	1	Ō	?
Student Ranges				<u>S</u> ave	
Student Status: 🔿 Active 🔿 Inactive 💿 Both				Back	
All Student Types Student Types					
Grade Levels 01,02,03,04,05,06,07,08,09,10,11,12,K2,P0,P1,P2,P3,P4					
Entities 103,201,401,407,499,701,702					
Ste	ep 2 of	2			

Figure 2 - Selecting Student Ranges when creating an Auto Email from Entity OOO

AREA	PURPOSE OF AREA
Student Ranges	The Student Ranges screen appears when adding or editing an Auto Email from Entity 000 and allows you to specify which students the Auto Email is configured for.
Option	Description
Student Status	Select whether the range includes Active students, Inactive students, or both.
All Student Types Student Types	Select students for inclusion by Student Type Code. To learn more about Student Type Codes, see the <i>WSIPC Guide to Student Demographics and</i> <i>Families</i> .
Grade Levels	Specifies the Grade Level(s) of students to whom the Auto Email applies.
Entities	Select the Entities to which the Auto Email applies.

Table 2 - Options available on the Student Ranges screen

Previewing an Auto Email

You can preview an Auto Email to see how it will appear when sent out. You may find this helpful when you want to review the contents of an Auto Email, but not make any changes to it.

To preview an Auto Email:

- 1. Go to Student Management\Advanced Features\AF\AE.
- 2. Select the Auto Email to preview.
- 3. Click Preview E-Mail. Figure 3 shows the Preview Email screen.
- 4. When you've finished previewing the Auto Email, click Back (at the bottom of the screen).

Preview Email	1	1	ġ	?
NOTE: This is only an example email. The proper values will be inserted when an actual email is generated.				
\$UBJECT				
A Discipline Referral Has Been Assigned To Jason Jones				
MESSAGE				
A discipline referral has been entered by John Doe and assigned to Jason Jones: skipping class				
Back				

Figure 3 - Preview Email screen showing an example of how Auto Emails will appear to the recipients

Cloning an Auto Email

If there is an existing Auto Email that is similar in content or application to your current purpose, you can clone the existing Auto Email and use it as a starting point, rather than creating a new Auto Email. When you clone an Auto Email, the Student Ranges screen appears where you can specify the Entities to which it should be applied, as well as other student ranges. You can customize the content of the cloned Auto Email just as you do when you create a new Auto Email.

To clone an Auto Email:

- 1. Go to Student Management\Advanced Features\AF\AE.
- 2. Select the Auto Email to clone.
- 3. Click Clone.
- 4. Configure the Automated E-mail Maintenance screen (see Figure 1 on page 6). Table 1 (page 9) describes the options on this screen.
- 5. Click Next.
- 6. Configure the Student Ranges screen (see Figure 2 on page 9). Table 2 (page 9) describes the options on this screen.

Note	You can select multiple Entities on the Student Ranges
	screen when cloning an Auto Email.

7. Click Save.

Editing an Auto Email

You can edit an Auto Email at any time. This can be useful if, for example, you want to update an email's recipients or make changes to the Message Composition. You can also edit an Auto Email to make it Inactive.

TipChanging the Automated Event Status to Inactive on particular
Auto Email Event Types, such as Enrollment Changes and Current
Year Schedule Changes during specific times of the school year,
can prevent recipients from getting a large number of excessive
auto emails.

To edit an Auto Email:

- 1. Go to Student Management\Advanced Features\AF\AE.
- 2. Do one of the following:
 - Select the Auto Email to be edited, and click Edit.
 - Expand the desired Auto Email record, and click Edit Message Composition.
- Configure the Automated E-mail Maintenance screen (see Figure 1 on page 6). Table 1 (page 9) describes the options on this screen.
- 4. Click Save.

Editing Student Ranges on an Auto Email

You can also edit the student ranges on an Auto Email at any time. This can be helpful if you need to modify the Auto Email for a different group of students.

To edit the student ranges on an Auto Email:

- 1. Go to Student Management Advanced Features AF AE.
- 2. Expand the desired Auto Email record.
- 3. Click Edit Student Ranges.

- 4. Configure the Student Ranges screen (see Figure 2 on page 9). Table 2 (page 9) describes the options on this screen.
- 5. Click Save.

Deleting an Auto Email

If your Entity no longer wants to use an Auto Email, you can delete it.

Caution If an Auto Email includes multiple Entities in the student ranges, and you delete the Auto Email, it is also deleted from the other Entities.

> If an Auto Email is in use for multiple Entities, and you only want to remove it from some of the Entities, you must edit the Student Ranges and remove those Entities from the Auto Email.

To delete an Auto Email:

- 1. Go to Student Management\Advanced Features\AF\AE.
- 2. Select the Auto Email to be deleted.
- 3. Click Delete. A message asks you to confirm the record to be deleted.

Note	If the Delete button is not available when you select the
	Auto Email, the Auto Email is controlled by another
	module. For example, a Food Service Low Balance Auto
	Email is created in the Food Service module. To disable
	the Food Service Low Balance Auto Email, you must
	disable the Allow Guardians to Subscribe to Food Service
	Low Balance E-mails option through Family Access
	Configuration (Student Management\Families\FM
_	Setup\CF\DU).

4. Click Yes.

Managing System Contacts

System Contacts are staff members you can specify as the contact person for various areas of the software, such as Attendance, Discipline, Food Service, Grading, Graduation Requirements, and Student Information. System Contacts are Entity-specific.

System Contacts can be selected as Message Recipients of Auto Emails. To learn more about Automated (Auto) Emails, see "<u>Using Automated Emails</u>" (page 4).

When staff members are selected as a System Contact for an area of the software, they are automatically attached to the Contact Us email link at the top of the Family Access screen in the Student Information area. For example, you may want to add the Food Service Director as a System Contact for the Food Service area in your Entity so that parents can email the Food Service Director through Family Access if they have questions. If you'd like System Contacts to display in Student Access, the option must be configured. To learn how System Contacts are used in Family and Student Access, see the *WSIPC Guide to Family and Student Access Administration and Management*, and the *WSIPC Guide to Family and Student Access for Students and Guardians*.

Adding or Editing a System Contact

You can add or edit System Contacts at any time. Changes made to System Contacts take effect immediately.

To add or edit a System Contact:

- 1. Go to Student Management\Advanced Features\AF\SC.
- 2. Do one of the following:
 - To add a System Contact, click Add.
 - To edit an existing System Contact, select the desired System Contact and then click Edit.

- 3. Configure the Add or Edit screen. Figure 4 shows the Add screen, but options are identical on both screens. Table 3 describes the options on these screens.
- 4. Click Save.

Add 🔝 🔝	1	•
System Contact Entity: 401 - WSIPC High School v System Area: DISCIPLINE v Contact: COFFELYN000 Cofferscr Lynna R E-mail Address: scramble5741@example.com		<u>S</u> ave <u>B</u> ack
Comments: Vice-Principal at Entity 401 handles all discipline issues/incident.		
System Area:		
Contact Name:		
E-mail:		

Figure 4 - System Contact Add screen

AREA	PURPOSE OF AREA
System Contact	Options in this area apply to the System Contact that you create.
Options in This Area	Description of Options
Entity	The Entity to which the System Contact belongs.

Options in This Area	Description of Options
	The area of the system to which the System Contact applies:
System Area	 Attendance Curriculum Discipline Food Service Grading Schedule Student Info
Contact	The name of the System Contact.
E-Mail Address	The email address of the System Contact. The staff member's email from their Staff record (Student Management\Staff\SF) defaults into the E-Mail Address box on the Add System Contact screen and cannot be changed. If the email address is incorrect, changes must be made from their Staff record.
Comments	Additional information regarding the System Contact that displays in Family and Student Access when the Contact Us link is selected.
AREA	PURPOSE OF AREA
Overrides	Allows you to enter information to display instead of the actual values displayed above.
Options in this Area	Description of Options
System Area	Allows you to customize the System Area that is displayed for the System Contact. For example, you could change the System Area of "Curriculum" to read "Curriculum and Assessments" instead.

Options in This Area	Description of Options
Contact Name	Allows you to customize the Contact Name that is displayed for the System Contact. For example, you might want to change the Contact Name for the Attendance contact to display as "Truancy Officer" rather than the Attendance contact's first and last name.
E-Mail	Allows you to customize the email address that is displayed for the System Contact. For example, you may want to redirect all correspondence for the System Area to a dedicated email address.

Table 3 - Options available on the Add screen

Deleting System Contacts

You can delete System Contacts that are no longer in use. For example, if the System Contact for an area is no longer employed by the district, you can delete the System Contact record.

To delete a System Contact:

- 1. Go to Student Management\Advanced Features\AF\SC.
- 2. Select the System Contact.
- 3. Click Delete. The following message appears:

"Are you sure you wish to delete this record?"

4. Click Yes.

Using Student Indicators

Student Indicators are Entity-specific colored markers attached to student records based on pre-defined categories that you select. An Entity can have up to 12 Student Indicators in use at one time. Student Indicators must be configured at the Entity level. You cannot configure student indicators from Entity 000.

You can configure student indicators for the following categories:

- Student has a Special Ed Disability
- Student is Enrolled in a Special Ed Program
- Student has a Health Condition
- Student is Classified as Section 504
- Student is Gifted/Talented
- Student is Limited English Proficient
- Student has a Reason Code
- Student was Retained Last School Year
- Student has a Parental Consent Note
- Student is Enrolled in a Childcare Program
- Student has Homeless Information
- Student has District Category
- Student has Entity Category
- Student is Enrolled in an Activity
- Student has NCLB-2 Program Enrollment
- Student has Unapproved AUP
- Student has an IHP Individual Health Plan
- Student Requires a Doctor's Note for Absences

Note	The Indicator Category of Student Requires a Doctor's Note for
	Absences is only available to set as a Student Indicator when the
	Attendance Configuration option Use Required Doctor's Note
	Flag Option is selected (Student Management\Office\AT
	Setup\CF\EY).

Understanding How Student Indicators Are Displayed

Student Indicators display in multiple modules of Student Management, on every Profile and Browse screen where student names appear. For example, Student Indicators appear in Discipline Entry by Student and Special Education.

Figure 5 shows an example of a Student Indicator displayed in Student Profile. The Indicator has been configured to appear for any student who has a specific health condition. You can pause your mouse pointer over the Student Indicator to view additional information that is attached to the Indicator.

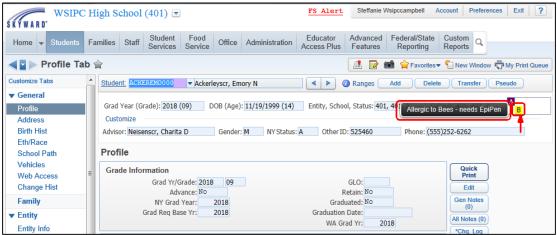


Figure 5 - This student has a Student Indicator of a yellow "B" to denote that he is allergic to bees.

Adding a Student Indicator

You can add Student Indicators to identify students based on a number of different pre-defined Indicator Categories. Students can have more than one Student Indicator attached to their student record at the same time. When you add a Student Indicator, you create the Indicator which makes it available to all student records that match the category you select. The Indicator is automatically attached to all students who qualify for the specific category.

To add a Student Indicator:

- 1. Go to Student Management\Advanced Features\AF\SI.
- 2. Click Add.

- 3. Configure the Add Indicator screen (Figure 6) by doing the following (for a description of the options on this screen, see Table 4):
 - a. Select an Indicator Color.
 - b. Select an Indicator Category.
 - c. Select a Display Position using the check boxes. You are only able to select from available positions.
 - d. Configure the Indicator Options. The choices available are specific to the Indicator Category you have chosen.
 - e. If displayed, select any applicable Codes. These appear based on the Indicator Category you have chosen.
- 4. Click Save.

d Indicator		1	Ō
tudent Indicator			<u>S</u> ave
Entity and All Current S	tudent Indicators		<u>B</u> ack
	All Student A S N C		
401 - WSIPC High S	chool Indicators for Entity: 401 B		
Indicator Color	Indicator Category		
Black	C Student has a Special Ed Disability		
C Dark Blue	C Student is Enrolled in a Special Ed Program		
C Green	C Student has a Health Condition		
C Blue-Green	C Student is Classified as Section 504		
C Dark Red	C Student is Gifted/Talented		
C Purple	Student is Limited English Proficient		
C Dark Yellow	C Student has a Reason Code		
C Dark Grav	C Student was Retained Last School Year		
C Light Gray	C Student has a Parental Consent Note		
C Blue	Student is Enrolled in a Childcare Program		
C Light Green	Student has Homeless Information		
C Light Blue	C Student has District Category		
C Red	 Student has Entity Category 		
C Pink	C Student is Enrolled in an Activity		
C Yellow	Student has NCLB-2 Program Enrollment		
C White	Student has unapproved AUP		
	Student has an IHP - Individual Health Plan		
Display Position	C Student Requires a Doctor's Note for Absences		
	Indicator Options		
	Code: L		
	Status: Active Inactive		
Actual Display	Tooltip: Student enrolled in a LEP program.		
	Do not show Indicator in Educator Access Plus ?		
Available Limited English	Proficiency(LEP) Codes Select All		
Code 🔺	Codes		
	Unselect Air		
✓ Not			
Served	Served		
	-		

Figure 6 - Add Indicator screen

Option	Description
Entity and All Current Student Indicators	Shows the Entity for which you are creating a Student Indicator, as well as the existing Student Indicators for that Entity and their positions in the Student Indicator box.
Indicator Color	Select the color of the Student Indicator.

Option	Description
Indicator Category	Select the item that activates the Student Indicator. For example, if you select an Indicator Category of Student is Limited English Proficient, the Student Indicator will display for students who have a Limited English Proficiency record on their NCLB – 2 tab.
Display Position	Allows you to select the position where the Student Indicator is assigned. If an existing Student Indicator is already assigned a position, you cannot place the new Indicator in that position.
Actual Display	Shows how the Student Indicator will appear in that position based on your selections in the Indicator Color, Display Position, and Code boxes.
Code	The single-character code that displays as the Student Indicator. The code can contain alpha-numeric characters and common symbols found on your keyboard (such as *, &, +, and =).
Status	Denotes whether the Student Indicator is currently in use or not (Active or Inactive). Student Indicators with an Inactive Status no longer display on students' records.
Tooltip	Text that displays when you pause your mouse pointer over the Student Indicator. This is helpful when many Student Indicators are in use, and users may not be familiar with all of them.
Do not show Indicator in Educator Access Plus	Hides Indicator from the teacher's Class Roster, Post Daily Attendance, and Student Information areas in Educator Access Plus.

Option	Description
	Gives users access to view the details of the Student Indicator record. If this option is not selected, users only see the Indicator Category.
Display Indicator details for all users	This option is available only when one of the following Indicator Categories is selected:
	 Student has a Special Ed Disability Student is Enrolled in a Special Ed Program Student has a Health Condition Student is Gifted/Talented Student has an IHP – Individual Health Plan
	Checks all Entities to see if student was Retained last school year.
Check all entities	This option is available only when the following Indicator Category is selected:
	 Student was Retained Last School Year
Show Indicator even if IEP	Attaches Student Indicator to a student's record even if the IEP (Individualized Education Plan) has expired. To learn more about IEPs, see the <i>WSIPC</i> <i>Guide to Special Education</i> .
is expired	This option is available only when one of the following Indicator Categories is selected:
	 Student has a Special Ed Disability Student is Enrolled in a Special Ed Program
	Displays the Student Indicator on a student's record even after they have exited from Special Education.
Show Indicator if student has exited Special Ed	This option is available only when one of the following Indicator Category is selected:
	 Student has a Special Ed Disability Student is Enrolled in a Special Ed Program

Option	Description
	Displays the Student Indicator on a student's record even if the student's enrollment in the program is not current.
Show Indicator even if enrollment is not current	This option is available only when one of the following Indicator Categories is selected:
	 Student is Classified as Section 504 Student has Homeless Information
Display for current year notes only	 Displays the Student Indicator when students have a Parental Consent Note for only the current school year. To learn more about Parental Consent Notes, see the WSIPC Guide to Student Demographics and Families. This option is available only when the following Indicator Category is selected: Student has a Parental Consent Note
Available Codes	The codes that display in the list at the bottom of the Add Indicator screen are codes unique to the specific Indicator Category selected. These codes allow you to configure Stud Indicators to display only for a subset of students in a Categories For a list of Indicator Categories with Available Codes and learn more about selecting Available Codes, see " <u>Understan Available Codes Selection</u> " immediately below this table.

Table 4 - Options available on the Add screen when creating a new student indicator

Understanding Available Codes Selection

Some Indicator Categories include a list of Available Codes at the bottom of the Add Indicator screen to be used in configuring Student Indicators. The list of Available Codes is unique to the specific Indicator Category selected and allows you to configure Student Indicators to display only for a subset of students in the Category.

For example, when the Indicator Category of Health Condition is selected, all Health Condition codes appear in the Available Health Condition Codes area on the Add Indicator screen and are selected by default (see Figure 7). If no changes are made to which Health Condition Codes are selected, the Health Condition Student Indicator will display for any student with an Active Health Condition record.

udent Indicator		Save
Entity and All Current S	Student Indicators	Back
-	All Student A S N C	
401 - WSIPC High Scl	hool V Indicators for Entity: 401	
ndicator Color	Indicator Category	
Black	○ Student has a Special Ed Disability	
🔾 Dark Blue	O Student is Enrolled in a Special Ed Program	
Green	Student has a Health Condition	
Blue-Green	Student is classified as Section 504	
Dark Red	O Student is Gifted/Talented	
O Purple	O Student is Limited English Proficient	
Dark Yellow	O Student has a Reason Code	
Dark Gray	 Student was Retained Last School Year Student has a Parental Consent Note 	
) Light Gray Blue	Student has a Parental Consent Note	
C Light Green	O Student has Homeless Information	
Clight Blue	O Student has District Category	
C Red	O Student has Entity Category	
) Pink	O Student is Enrolled in an Activity	
O Yellow	O Student has NCLB-2 Program Enrollment	
🔾 White	Student has unapproved AUP	
	Student has an IHP - Individual Health Plan	
Display Position	O Student Requires a Doctor's Note for Absences	
	Indicator Options	
	Code: H	
	Status: Active O Inactive	
Actual Display	Tooltip:	
	Do not show Indicator in Educator Access Plus ?	
	Display indicator details for all users ?	
vailable Health Conditi	ion Codes Select	
Code 🔺		
	Description Unsele Charcot-Marie Tooth Syndrome	
✓ AD	Cleft Lip and Palate	
✓ AF		
✓ AF	Congenital Adrenal Hyperplasia	
	Congenital Cndtn - Othr	
AH	Down's Syndrome	
	Ehlers-Danlos Syndrome	

Figure 7 - Health Condition Student Indicator where all Health Conditions are selected

Your district may want to add a Health Condition Indicator that displays for students who have a Health Condition that causes an Anaphylaxis reaction and who need their Epi-pen immediately. To accomplish this, click Unselect All Codes and then select the check box for all Health Condition Codes that meet the definition of having an Anaphylaxis reaction (see Figure 8).

When you select specific Codes from the Available Codes list for a particular Indicator Category, you may want to add a description in the Tooltip box that will explain the Codes you selected. In the example in Figure 8 where specific Health Condition Codes were selected, the Tooltip states which type of Health Codes were selected.

dd Indicator			(
itudent Indicator		Sa	ve	
Entity and All Current St	udent Indicators	Ba	ck	
401 - WSIPC High Scho	ol ✓ All Student Indicators for Entity: 401			
Indicator Color	Indicator Category			
O Black O Dark Blue O Green	O Student has a Special Ed Disability Student is Enrolled in a Special Ed Program Student has a Health Condition			
O Blue-Green O Dark Red	Student is Classified as Section 504			
O Purple Dark Yellow Dark Gray	Student is Limited English Proficient Student has a Reason Code Student was Retained Last School Year			
O Light Gray Blue Light Green	Student has a Parental Consent Note Student is Enrolled in a Childcare Program Student has Homeless Information			
C Light Blue Red Pink	Student has District Category Student has Entity Category Student is Enrolled in an Activity			
O Yellow O White	O Student has NCLB-2 Program Enrollment O Student has unapproved AUP O Student has an IHP - Individual Health Plan			
Display Position	O Student Requires a Doctor's Note for Absences			
	Indicator Options Code: 1			
Actual Display	Status: Active O Inactive Tooltip: ANAPHYLAXIS REACTION - NEEDS EPI-PEN Life Threatening Allergy	-		
	Do not show Indicator in Educator Access Plus Display indicator details for all users ?			
Available Health Condition	n Codes Select			
Code 🔺	Description Unselec			
A0	Anaphylaxis Reaction Code			
✓ A4	Severe Food Allergy			
✓ A6	Severe Allergy Insect/Bee			
A80	Non Severe Food Allergy			
A81	Non Severe Medication Allergy			
	Charcot-Marie Tooth Syndrome			

Figure 8 - Health Condition Student Indicator where specific Health Conditions are selected

The Available Codes list is available only when the following Indicator Categories are selected:

- Student has a Special Ed Disability
- Student is Enrolled in a Special Ed Program
- Student has a Health Condition
- Student is Limited English Proficient
- Student has a Reason Code
- Student has District Category
- Student has Entity Category
- Student is Enrolled in an Activity
- Student has NCLB-2 Program Enrollment

To learn more about each of these Indicator Categories and the Available Codes list for each, see the *WSIPC Guide to Special Education*, the *WSIPC Guide to Student Demographics and Families*, and the *WSIPC Guide to Health Records*.

Editing a Student Indicator

You can edit Student Indicators to modify or add information. The following items can be modified on existing Student Indicators:

- Indicator Color
- Indicator Code
- Indicator Status
- Tooltip text
- Miscellaneous options such as Display indicator details for all users and Do not show Indicator in Educator Access Plus
- Codes selected in the Available Codes list

To edit a Student Indicator:

- 1. Go to Student Management\Advanced Features\AF\SI.
- 2. Select the Student Indicator to be edited.
- 3. Click Edit.
- 4. Configure the Edit screen. The options available on this screen are the same as those found on the Add screen (see Table 4 on page 24).
- 5. Click Save.

Deleting a Student Indicator

You can delete Student Indicators that are no longer wanted. When you delete a Student Indicator, the Indicator is removed from all students that it was attached to.

Tip	If you want to hide the Student Indicators from displaying on
	students in Student Management for just a certain period, you can
	change the Indicators Status from Active to Inactive instead of
	deleting the Indicators. When you want the Student Indicators to
	display again on students, you can change the Status back to
	Active.

To delete a Student Indicator:

- 1. Go to Student Management\Advanced Features\AF\SI.
- 2. Select the Student Indicator to be deleted.
- 3. Click Delete. A message appears to confirm that you want to delete the student indicator.
- 4. Click Yes.

Using Processing Lists

Processing Lists allow you to assemble a list of names and use that same list of names when generating a variety of Student Management Reports. Processing Lists are Entity-specific, so unless you are working in Entity 000, only students from your Entity are captured in a Processing List. For example, a secretary needs to create a list of students when running the Current Scheduling Academic Eligibility Report in Entity 400 and would then like to use that same list of students to run the Health Vaccination Report in the same Entity. Processing Lists help you save time because you can create a student list once and then use it for many reports, including Data Mining Reports.

With Processing Lists, there are multiple ways to manage which students are included in a list. You can individually select names and you can dynamically change names using a variety of list options. Regardless of which method you use, think of a Processing List as a "snapshot" of a group of students. A secretary may create a Processing List in October for all Special Education students who have a Discipline record, but by March the students who fit this profile may have changed. As a result, the Processing List is outdated. Processing Lists make it easy to refresh outdated data in order to keep your lists current, so that you get the right population of students every time when you need it.

One of the more valuable features of Processing Lists is that you have two different ways to create and manage your lists:

- From many different Student Management Reports
- Using the Advanced Features module

To learn more about Processing Lists, see the WSIPC Guide to Processing Lists.

Using Message Center

Message Center allows you to email global messages to students and guardians about school announcements and events. You can also post messages to the Home Wall and Calendar in Family and Student Access. Range parameters and Processing Lists help you define which students and guardians receive the messages.

With Message Center, you can create messages for the entire district or for a single Entity. Your district decides who sends district-wide messages, and who at each Entity can create and send Entity-specific messages. This helps to avoid duplicate messages for the same recipients on the same topic. To learn more about Message Center, see the *WSIPC Guide to Message Center for Office Personnel*.

Teachers can also use Message Center for their classes. To learn how teachers can use Message Center, see the *WSIPC Guide to Message Center for Teachers, Advisors, and Activity Leaders.*

Using Skylert

Skylert works in connection with School Messenger, which contacts guardians and staff through automated phone calls, text messaging, and emails, regarding Attendance, Food Service balances, and emergency notifications.

Guardians, through Family Access, can set up which message types should be sent and which phone numbers and email addresses to use.

WSIPC's Infrastructure Services department configures the Skylert setup for each district using School Messenger.

Using Transcript Signature

Transcript Signature allows you to set up an electronic signature to print on Skyward's Transcript (Student Management\Office\GR\TR\RE\TR).

The Transcript Signature area only works with Skyward's Transcript and does not work on the Washington State Standardized Transcript (Student Management\ Office\GR\TR\RE\WA\SH or Student Management\Federal/State Reporting\WA\ RE\TR/SH).

Using the Address Module

The Address module contains both an Address Master and a Mailing Address Master where you create and maintain Address records that are attached to Name records. Changes made in the Address module affect the entire district. The Address module also has a Reports area that has two reports to help you maintain addresses.

Using the Address Master

The Address Master (Figure 9) contains addresses that have been entered for the district. You can use the Address Master to add new addresses, view current and past occupants of an existing address, and see any mail categories attached to an address.

To use the Address Master:

• Go to Student Management\Advanced Features\AD\AM.

et ▲ Dir Number SUD & Number Address2 PO Box City & State NOBLE PL 2520 EVERETT, WA Expand All Collapse All Modify Details (displaying 5 of 5) View Printable Details ✓ General 2520 NOBLE PL EVERETT WA 98204	ne 👻 Students Familie	es Staff Stud Servi			dministration	Educator Access Plus	Advan Featu			Custo Repo			
et a Dir Number Address2 PD Box City & State PD Bo	Address Master	r 😭					A 🔽	🕈 🚺 🏠 Fa	vorites 🔻 🍕	New	Windo	w 🗖	My Prin
NOBLE PL 2520 EVERETT, WA Expand All Collapse All Modify Details (displaying 5 of 5) View Printable Details General 2520 NOBLE PL EVERETT WA 98204 Current Occupants Mane Marcell K. Gehmanscr GEHMAAJER000 Active Shereil Gehmanscr GEHMASHD000 Active Shereil Gehmanscr GEHMASHD000 Active Shereil Gehmanscr GEHMASHD000 Active Shereil Gehmanscr KINGHNIG000 Active Address History Name Kinghomscr KINGHNIG000 Active 1006/2014 Newman O. Kinghomscr KINGHNIG000 Active 1006/2014 1006/2014 Newman O. Kinghomscr KINGHNIG000 Active Newman O. Kinghomscr KINGHNIG000 NA Newman O. Kinghomscr KINGHNIG000 NA 1005/2014 1006/2014 Newman O. Kinghomscr KINGHNIG000 NA 1005/2014 1006/2014	General 💌	Filters: *Skywa	rd Default						T		8	Ð,	Add
Expand All Collapse All Modify Details (displaying 5 of 5) View Printable Details Sepand All Collapse All Modify Details (displaying 5 of 5) View Printable Details Sepand All Collapse All Modify Details (displaying 5 of 5) View Printable Details V General EVERETT WA 98204 V Current Occupants Name Key Status Jerrell R. Gehmanscr GEHMAJER000 Active Marcell K. Gehmanscr GEHMAJER000 Active Malena P. Kinghorn KINGHNUS00 Active Newman O. Kinghornscr KINGHNUS000 Active Nigel P. Kinghornscr KINGHNUS000 Active Nigel P. Kinghornscr KINGHNEW000 N/A Newman O. Kinghornscr KINGHNEW000 N/A Rolanda H. Lifksecr LITKEROL000 N/A Rohada L. Gehmanscr GEHMAAREN000 N/A Marcell K. Gehmanscr GEHMAAREN000 N/A Nove DioScolit A 1005/2014 1005/2014 Rohada L. Gehmansc	A	Dir Nu	mber	SUD & Num	ber Addres	s2	F	PO Box	City & Stat	te			Edi
▼ General 2520 NOBLE FL EVERETT WA 98204 ▼ Current Occupants Mame Name Key Jereil R. Gehmanser GEHMAJER000 Active Active Marcell K. Gehmanser GEHMAJER000 Sherrell Gehmanser GEHMAJER000 Newman O. Kinghornser KINGHMALU00 KINGHMALU00 N/A Ngel P. Kinghornser KINGHNUG000 KINGHNUG000 Active Ngel P. Kinghornser KINGHNUG000 KINGHNUG000 Active Nigel P. Kinghornser KINGHNUG000 Nigel P. Kinghornser KINGHNEV000 Name 10/06/2014 10/06/2014 Newman O. Kinghornser KINGHNEV000 N/A Rolada H. Litkeser GEHMAREN000 N/A Renado L. Gehmanser GEHMAREN000 N/A GeHMAREN000 N/A 10/05/2014 Marcell K. Gehmanser	BLE PL	2	520						EVERETT	, WA		-	Delet
▼ General 2520 NOBLE FL EVERETT WA 98204 ▼ Current Occupants Mame Jerrell R. Gehmanser GEHMAJER000 Active GEHMAJER000 Marcel K. Gehmanser GEHMAJER000 Active GEHMAJER000 Marcel K. Gehmanser Malena P. Kinghomser GHMAJER000 KINGHMALU00 N/A Ngel P. Kinghomser KINGHMUR000 KINGHNEW000 N/A Nigel P. Kinghomser KINGHNEW000 Nigel P. Kinghomser KINGHNEW000 Nigel P. Kinghomser KINGHNIG000 KINGHNEW000 N/A Nigel P. Kinghomser KINGHNEW000 Nobel D. Gehmanser GEHMAREN000 NA 10/15/2014	waand All Collanse All Me	dify Dotaile (display	(ing 5 of 5)	View Driptoble I	Dotaile								
Verrett VVA 98204 • Current Occupants Name Key Status Jerrell R. Gehmanscr GEHMAJER000 Active Marcel K. Gehmanscr GEHMAJER000 Active Malena P. Kinghorn KINSHMAL000 Active Malena P. Kinghornscr KINSHMVL000 Active VAdress History KINSHMVL000 Active Nigel P. Kinghornscr KINSHMVL000 Active Nigel P. Kinghornscr KINSHMVL000 Active Nigel P. Kinghornscr KINSHMVL000 Active 1006/2014 Nigel P. Kinghornscr KINSHMVL000 Active 1006/2014 1006/2014 Newman O. Kinghornscr KINSHMV000 N/A 100/5/2014 1006/2014 Newman O. Kinghornscr KINSHMV000 N/A 100/5/2014 1006/2014 Newman O. Kinghornscr KINSHMV000 N/A 100/5/2014 100/5/2014 Newman O. Kinghornscr KINSHMR000 Active 100/6/2014 10/13/2014 Renaldo L. Gehmanscr GEHMARRN000 N/A 100/5/2014 10/13/2014 Marcel K. Gehmanscr GEHMARRN000 Active 10/06/201	xpanu Ali Collapse Ali Mo	uity Details (uispia	ying 5 or 5)	view Printable i	Decalis								
EVERETT WA 98204 Current Occupants 	General												
EVERETT WA 98204 Current Occupants 	2520 NOBLE PL												
V Current Occupants Name Key Status Jerrell R. Gehmanscr GEHMAJER000 Active Marcell K. Gehmanscr GEHMAJER000 Active Sherrell Gehmanscr GEHMAJER000 Active Marcell K. Gehmanscr GEHMAJER000 Active Malena P. Kinghorn KINGHMIL000 N/A Newman O. Kinghornscr KINGHNEV000 N/A Nigel P. Kinghornscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active 10/06/2014 Newman O. Kinghornscr KINGHNIG000 Active 10/06/2014 Newman O. Kinghornscr KINGHNEV000 N/A 10/06/2014 Newman O. Kinghornscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Newman O. Kinghornscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Newman O. Kinghornscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Rolada H.Lilkescr LITKEROL00 N/A 10/06/2014 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/06/2014													
Name Jerrell R. Gehmanscr GEHMAJER000 Status Active GEHMAJER000 Marcell K. Gehmanscr GEHMAJER000 Active Active GEHMAJER000 Marcell K. Gehmanscr Meman O. Kinghornscr GEHMAJER000 V Address History V Name Name Key KINGHMIAL000 Nigel P. Kinghom Name Name Key KINGHNIG000 Active Nigel P. Kinghomscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A Newman O. Kinghornscr KINGHNEW000 N/A Newman O. Kinghornscr KINGHNEW000 N/A Rolada H.Lilkescr LITKEROL000 N/A Renaldo L.Gehmanscr GEHMAREN000 N/A Marcell K. Gehmanscr GEHMAREN000 N/A Name GeHMAREN000 N/A N/A Nobe/Coll Newman O.Kinghornscr KINGHNEW000 N/A 10/05/2												Ξ	
Jerrell R. Gehmanscr GEHMAJR000 Active Marcell K. Gehmanscr GEHMAAR000 Active Sherrell Gehmanscr GEHMAAR000 Active Malena P. Kinghom KINGHNEW000 N/A Newman O. Kinghornscr KINGHNEW000 N/A Nigel P. Kinghom KINGHNIK000 Active Name Name Key Status Move In Date Nigel P. Kinghornscr KINGHNIK000 Active 10/06/2014 Nigel P. Kinghornscr KINGHNIK000 Active 10/06/2014 Newman O. Kinghornscr KINGHNIK000 Active 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Rolanda H.Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/05/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 N/A	Current Occupants												
Jerrell R. Gehmanscr GEHMAJR000 Active Marcell K. Gehmanscr GEHMAAR000 Active Sherrell Gehmanscr GEHMAAR000 Active Malena P. Kinghom KINGHNEW000 N/A Newman O. Kinghornscr KINGHNEW000 N/A Nigel P. Kinghom KINGHNIK000 Active Name Name Key Status Move In Date Nigel P. Kinghornscr KINGHNIK000 Active 10/06/2014 Nigel P. Kinghornscr KINGHNIK000 Active 10/06/2014 Newman O. Kinghornscr KINGHNIK000 Active 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Rolanda H.Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/05/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 N/A	Name	Name Kev	Status										
Marcell K. Gehmanscr GEHMAMAR000 Active Sherrell Gehmanscr GEHMASHE000 Active Malena P. Kinghom KINGHMAL000 N/A Newman O. Kinghomscr KINGHNEW000 N/A KINGHNEW000 N/A Active Name Name Key Status Move In Date Nigel P. Kinghomscr KINGHNIG000 Active 10/06/2014 Nigel P. Kinghornscr KINGHNIG000 Active 10/06/2014 Nigel P. Kinghornscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghonnscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghonnscr KINGHNEW000 N/A 10/06/2014 Newman O. Kinghonnscr KINGHNEW000 N/A 10/06/2014 Rolanda H.Litkescr LITKEROL000 N/A 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/15/2014 Marcel K. Gehmanscr GEHMAREN000 Active 10/06/2014 Marcel K. Gehmanscr GEHMAREN000 Active 10/06/2014 Malena P. Kinghom KINCHMAR000 Active 10/06/2014 Mal		-											
Sherrell Gehmanscr Malena P. Kinghornscr Nigel P. Kinghornscr GEHMASHE000 KINGHNEV000 KINGHNEV000 KINGHNEV000 KINGHNEV000 KINGHNEV000 KINGHNEV000 KINGHNEV000 N/A Active • Address History Status Move In Date 10/06/2014 Move Out Date 10/06/2014 Nigel P. Kinghornscr KINGHNIG000 KINGHNIG000 Active Active 10/06/2014 Nigel P. Kinghornscr KINGHNIG000 KINGHNIG000 Active 10/06/2014 10/06/2014 Newman O. Kinghornscr KINGHNEV000 KINGHNEV000 N/A 10/05/2014 10/06/2014 Newman O. Kinghornscr KINGHNEV000 KINGHNEV000 N/A 10/06/2014 10/06/2014 Roland H. Lifkescr LITKEROL00 N/A 10/06/2014 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 KINGHMARD00 Active 10/13/2014 10/15/2014 Marcell K. Gehmanscr GEHMAREN000 GEHMAREN000 Active 10/06/2014 10/15/2014 Jerrell R.Gehmanscr GEHMAREN000 GEHMAREN000 Active 10/06/2014 Lift Sherrell Gehmanscr GEHMAREN000 GEHMAREN000 Active 10/06/2014 Lift Malena P. Kinghorn GEHMAREN000 KINGHNALD00 Active 10/06/2014 Lift Malena P. Kinghorn GEHMAREN000 KINGHNER000 Active 10/06/2014 Lift She													
Malena P. Kinghorn KINGHMAL000 N/A Nigel P. Kinghornscr KINGHNEW000 N/A Address History KINGHNIG000 Active Name Name Key Status Move In Date Nigel P. Kinghornscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active Nigel P. Kinghornscr KINGHNIG000 Active Newman O. Kinghornscr KINGHNIG000 Active Newman O. Kinghornscr KINGHNIG000 Active Newman O. Kinghornscr KINGHNEW000 N/A 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/06/2014 Malena P. Kinghorn KINGHMEW000 N/A 10/06/2014 Marcell K. Gehmanscr GEHMAREN000 Active 10/06/2014 Malena P. Kinghorn KINGHMEW000 Active 10/06/2014 Malena P. Kinghorn GeHMASHE000 <t< td=""><td>Sherrell Gehmanscr</td><td>GEHMASHE000</td><td>Active</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Sherrell Gehmanscr	GEHMASHE000	Active										
Newman O. Kinghomscr KINGHNEW000 N/A Nigel P. Kinghomscr KINGHNEW000 N/A Address History Name Name Key Status Move In Date 10/06/2014 Nigel P. Kinghomscr KINGHNIG000 Active 10/06/2014 10/06/2014 Newman O. Kinghomscr KINGHNIG000 Active 10/06/2014 10/06/2014 Newman O. Kinghomscr KINGHNEW000 N/A 10/05/2014 10/06/2014 Newman O. Kinghomscr KINGHNEW000 N/A 10/05/2014 10/06/2014 Rolanda H.Litkescr LITKEROL00 N/A 10/06/2014 10/06/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Marcell K.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/15/2014 Malena P.Kinghom KINGHMAL000 N/A 10/06/2014 10/15/2014 Jerrell R.Gehmanscr GEHMALER000 Active 10/06/2014 10/15/2014 Jerrell R.Gehmanscr GEHMALER000 Active 10/06/2014 10/15/2014 Sherrell Gehmanscr GEHMALER000 Active 10/06/2014 10/15													
Nigel P. Kinghomser KINGHNIG000 Active Address History Name Name Key Status Move In Date Move Out Date Nigel P. Kinghornser KINGHNIG000 Active 10/06/2014 10/06/2014 Nigel P. Kinghornser KINGHNIG000 Active 10/15/2014 10/06/2014 Newman O. Kinghornser KINGHNEV000 N/A 10/05/2014 10/06/2014 Rolanda H. Litkescr LITKEROL000 N/A 10/05/2014 10/06/2014 Renaldo L. Gehmanser GEHMAREN000 N/A 10/05/2014 10/13/2014 Marcell K. Gehmanser GEHMAREN000 N/A 10/15/2014 10/15/2014 Marcell R. Gehmanser GEHMAREN000 Active 10/06/2014 10/15/2014 Marcell R. Gehmanser GEHMAREN000 Active 10/06/2014 10/15/2014 Jerrell R. Gehmanser GEHMALER000 Active 10/06/2014 10/15/2014 Jerrell R. Gehmanser GEHMALER000 Active 10/06/2014 10/06/2014 Malena P. Kinghorn KINGHMAL000 Active 10/06/2014 10/06/2014 Malena Categories Add	-												
NameName KeyStatusMove In DateMove Out DateNigel P.KinghornscrKINGHNIG000Active10/06/201410/06/2014Nigel P.KinghornscrKINGHNIK000Active10/15/201410/06/2014Newman O.KinghornscrKINGHNEW000N/A10/05/201410/06/2014Newman O.KinghornscrKINGHNEW000N/A10/05/201410/06/2014Rolanda H.LitkescrLITKEROL000N/A10/05/201410/06/2014Renaldo L. GehmanscrGEHMAREN000N/A10/06/201410/13/2014Marcel K. GehmanscrGEHMAREN000N/A10/05/201410/15/2014Marcel K. GehmanscrGEHMAREN000N/A10/05/201410/15/2014Marcel K. GehmanscrGEHMAREN000N/A10/05/201410/15/2014Marcel R. GehmanscrGEHMAJER000Active10/06/201410/15/2014Jerrell R. GehmanscrGEHMAJER000Active10/06/2014Sherrell GehmanscrGEHMAJER000Active10/06/2014Y Mail CategoriesAdd CategoryAdd Category	-												
Nigel P. Kinghomscr KINGHNIG000 Active 10/06/2014 10/06/2014 Nigel P. Kinghomscr KINGHNIG000 Active 10/15/2014 10/06/2014 Newman O. Kinghomscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Newman O. Kinghomscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Rolanda H. Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Marcel K. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Marcel K. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Marcel R. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Jerrell R. Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Shrrell Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Shrrell Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Malt Categories Add Category 1	Address History			<u> </u>									
Nigel P. Kinghomscr KINGHNIG000 Active 10/06/2014 10/06/2014 Nigel P. Kinghomscr KINGHNIG000 Active 10/15/2014 10/06/2014 Newman O. Kinghomscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Newman O. Kinghomscr KINGHNEV000 N/A 10/06/2014 10/06/2014 Rolanda H. Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Marcel K. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Marcel K. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Marcel R. Gehmanscr GEHMAREN000 N/A 10/15/2014 10/15/2014 Jerrell R. Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Shrrell Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Shrrell Gehmanscr GEHMAJER000 Active 10/06/2014 10/06/2014 Malt Categories Add Category 1	Name	Name Key	Status	Move In Date	Move Out Date								
Newman O. Kinghomscr KINGHNEW000 N/A 10/06/2014 10/06/2014 Newman O. Kinghomscr KINGHNEW000 N/A 10/15/2014 10/06/2014 Rolanda H.Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/15/2014 Malena P.Kinghorn KINGHMAL000 Active 10/06/2014 10/15/2014 Jerrell R.Gehmanscr GEHMASE000 Active 10/06/2014 5 Jerrell Gehmanscr GEHMASE000 Active 10/06/2014 5 V Mail Categories Add Category 4 10/06/2014 5	Nigel P.Kinghornscr	KINGHNIG000	Active	10/06/2014	10/06/2014								
Newman O. Kinghomscr KINGHNEW000 N/A 10/15/2014 Rolanda H. Litkescr LITKEROL000 N/A 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/06/2014 Renaldo L. Gehmanscr GEHMAREN000 N/A 10/13/2014 Marcell K. Gehmanscr GEHMAREN000 N/A 10/13/2014 Marcell K. Gehmanscr GEHMAREN000 N/A 10/15/2014 Malena P. Kinghorn KINGHMAL000 N/A 10/15/2014 Jerrell R. Gehmanscr GEHMASHE000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014	Nigel P.Kinghornscr	KINGHNIG000	Active	10/15/2014									
Rolanda H.Litkescr LITKEROL000 N/A 10/06/2014 10/06/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/13/2014 10/13/2014 Marcel K.Gehmanscr GEHMARR000 Active 10/06/2014 10/15/2014 Malena P.Kinghom KINGHMAL000 N/A 10/15/2014 Jerrell R.Gehmanscr Jerrell R.Gehmanscr GEHMASHE000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014	Newman O.Kinghornscr	KINGHNEW000	N/A	10/06/2014	10/06/2014								
Renaldo L.Gehmanscr GEHMAREN000 N/A 10/06/2014 10/13/2014 Renaldo L.Gehmanscr GEHMAREN000 N/A 10/13/2014 10/15/2014 Marcell K.Gehmanscr GEHMAREN000 Active 10/06/2014 10/15/2014 Malena P.Kinghorn KINGHMAL000 N/A 10/15/2014 Jerrell R.Gehmanscr GEHMARER000 Active 10/06/2014 Sherell Gehmanscr GEHMASHE000 Active 10/06/2014		KINGHNEW000	N/A	10/15/2014									
Renaldo L.Gehmanscr GEHMAREN000 N/A 10/13/2014 10/15/2014 Marcell K.Gehmanscr GEHMAMAR000 Active 10/06/2014 Malena P.Kinghom KINGHMAL000 N/A 10/15/2014 Jerrell R.Gehmanscr GEHMAJER000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014	Rolanda H.Litkescr	LITKEROL000	N/A	10/06/2014	10/06/2014								
Marcell K. Gehmanscr GEHMAMAR000 Active 10/06/2014 Malena P. Kinghom KINGHMAL000 N/A 10/15/2014 Jerrell R. Gehmanscr GEHMAJER000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014 V Mail Categories Add Category Add Category	Renaldo L.Gehmanscr	GEHMAREN000	N/A	10/06/2014	10/13/2014								
Marcell K. Gehmanscr GEHMAMAR000 Active 10/06/2014 Malena P. Kinghom KINGHMAL000 N/A 10/15/2014 Jerrell R. Gehmanscr GEHMAJER000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014 V Mail Categories Add Category Add Category	Renaldo L.Gehmanscr	GEHMAREN000	N/A	10/13/2014	10/15/2014								
Jerrell R.Gehmanscr GEHMAJER000 Active 10/06/2014 Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014 Mail Categories Add Category	Marcell K.Gehmanscr		Active	10/06/2014									
Sherrell Gehmanscr GEHMASHE000 Active 10/06/2014 Mail Categories Add Category	Malena P.Kinghorn	KINGHMAL000	N/A	10/15/2014									
Mail Categories Add Category	Jerrell R.Gehmanscr	GEHMAJER000	Active	10/06/2014									
	Sherrell Gehmanscr	GEHMASHE000	Active	10/06/2014									
	Mail Categories Add Cate	000/											
No mail categories for this address.													
	No mail categories for this	address.											
▼ Busing Details	Busing Details												
No busing details for this address.	No busing details for this a	ddress.											

Figure 9 - You can expand a record in the Address Master to view additional information

Adding or Editing an Address

You can add new addresses to the Address Master as necessary. If an address has been entered with incorrect information, or needs to be updated, you can edit the address from the Address Master.

To add or edit an Address:

- 1. Go to Student Management\Advanced Features\AD\AM.
- 2. Do one of the following:
 - Click Add.
 - Locate the address in the list. Select the address, and then click Edit.

- 3. Configure the Address Maintenance screen (Figure 10). Table 5 describes the options on this screen.
- 4. Click Save.

ddress Maintenance			A 🖬 🕯 🖶 ?
Address: 2024 BROADW	AY Street Name	Address Preview	Save
SUD: APT 💌 #9	P.O. Box:	2024 BROADWAY APT #9	Back
Address 2:		EVERETT WA 98201	
* Zip Code: 98201 - Cit	ty/State: EVERETT, WA		
County: SNO Snohomish	Carrier:		
Township:	Own/Rent:		
Dwelling:	Census Area:		
Hazard:	Census Sub Area:		
CY Path:	NY Path:		
Path History	Horizontal Coord:		
Conv. Key:	Vertical Coord:		

Figure 10 - You can add and update address information using the Address Maintenance screen.

Option	Description
Address	House number.
Pre-directional (unlabeled field immediately to the right of Address)	North, Northwest, East, etc. If this does not apply, it should be left blank.
Street Name	The name of the street.
SUD	Secondary Unit Designator. For example, APT for Apartment.
SUD Number (unlabeled field immediately to the right of SUD)	Secondary Unit Designator number. For example, in "Apartment 9," the SUD Number is #9.
P.O. Box	Post Office Box (number only).
Address 2	Any additional address detail that may be required for delivery.
Zip Code	ZIP code associated with the address. To learn more about ZIP Codes, see " <u>Configuring Codes in the Address</u> <u>Module</u> " (page 40).

Option	Description
City/State	City and State associated with the address' ZIP code. This field is automatically populated based on the entered ZIP code.
County	County code, if used. To learn more about County Codes, see " <u>Configuring Codes in the Address Module</u> " (page 40).
Carrier	Mail carrier number, if used.
Township	Township code, if used. To learn more about Township Codes, see " <u>Configuring Codes in the Address Module</u> " (page 40).
Own/Rent	Denotes whether the address is an owned or rented property.
Dwelling	Dwelling Code, if used. To learn more about Dwelling Codes, see " <u>Configuring Codes in the Address Module</u> " (page 40).
Census Area	Census tracking information.
Hazard	Hazard Code, if used. To learn more about Hazard Codes, see " <u>Configuring Codes in the Address Module</u> " (page 40).
Census Sub Area	Census tracking information.
CY Path	Current Year Address Path description and code. Address Paths are outside the scope of this Guide.
NY Path	Next Year Address Path description and code. Address Paths are outside the scope of this Guide.
Path History	Tracks changes made to student's Path information. Address Paths are outside the scope of this Guide.
Horizontal Coord	Census tracking information.

Option	Description
Conv. Key	Do <i>not</i> use this option. This option may be used when districts convert to Skyward's School Management System from another student information system. It is not intended to be used for any other purpose.
Vertical Coord	Census tracking information.
Address Preview	Shows a preview of how the address appears on a mailing label.

Table 5 - Available options on the Address Maintenance screen

Deleting an Address

You can delete addresses when no Current Occupants exist. If an address has occupants, you must move those occupants to a different address before you'll be able to delete the address record.

To delete an address:

- 1. Go to Student Management\Advanced Features\AD\AM.
- 2. Locate the address in the list, select the address, and then click Delete.

A message asks you to confirm that you want to delete the record. The text of the message varies, depending on whether or not the address has any Address History records attached to it.

- 3. Do one of the following:
 - Click OK.
 - Click Yes.

Using the Mailing Address Master

The Mailing Address Master contains mailing addresses that have been entered for the district. You can use the Mailing Address Master to view current occupants who share a mailing address.

To use the Mailing Address Master:

• Go to Student Management\Advanced Features\AD\MA.

/iews: General 💌 Filters:	*Skyward De	fault 💌							7 🛄 🕙		Edit
treet 🔺	Dir	Number	SUD & Number	Address2	PO Box	City & State	ZIP	ZIP + 4	Address Number		Delete
Scramble Avenue		1			2698	Scramble, WV	55555		no	<u>^</u>	
Expand All Collapse All Mi	odify Details (di	splaying 2 of 2)	View Printable Details								
General	1			2							
1 Scramble Avenue PO Box 2698 Scramble WV 55555											
✓ Occupants	<u>.</u>										
Heather D. Jurekscr J	lame Key UREKHEA000										
Jessica L. Krissscr K Tiera K. Jurekscr JI Reuben C. Jurekscr JI Scramble Avenue	UREKIDA000 RISSJES000 UREKTIE000 UREKREU000	2			214	Scramble, WV	55555		no	H	
Jessica L. Krissser K Tiera K. Jurekser Ji Reuben C. Jurekser Ji Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3			733	Scramble, WV	55555		no	E	
Jessica L. Krissser K Tiera K. Jurekser JI Reuben C. Jurekser JI Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4	-		733 218	Scramble, WV Scramble, WV	55555 55555		no no	E	
Jessica L. Krisssor K Tiera K. Jureksor JJ Reuben C. Jureksor JJ Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5			733 218 88	Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555		no no no	E	
Jessica L. Krissscr K. Tiera K. Jurekscr JJ Reuben C. Jurekscr JJ Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6			733 218 88 204	Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555		no no no no	E	
Jessica L. Krissser K. Tiera K. Jurekser J. Reuben C. Jurekser J. Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7			733 218 88 204 433	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555		no no no no no	E	
Jessica L. Krissser K. Tiera K. Jurekser JJ Reuben C. Jurekser JJ Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7 8			733 218 88 204 433 43	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no	E	
Jessica L. Krissscr K. Tiera K. Jurekscr JJ Reuben C. Jurekscr JJ Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7 8 9	AT		733 218 88 204 433	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no no	E	
Jessica L. Krissser K. Trera K. Juekser JJ Reuben C. Juekser JJ Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7 8 9 10	APT		733 218 88 204 433 43 721	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no no no		
Jessica L. Krissacr K Tiera K. Jurekscr JJ Reuben C. Jurekscr JJ Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7 8 9 10 11	APT		733 218 88 204 433 43 721 721 725	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no no no no no		
Jessica L, Krissser K, Tiera K, Jurekser JJ Reuben C, Jurekser JJ Scramble Avenue Scramble Avenue	RISSJES000 UREKTIE000	3 4 5 6 7 8 9 10 11 12	APT .		733 218 88 204 433 43 721 721 726 726 785	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no no no no		
Jessica L. Krissscr K Tiera K. Jurekscr JI	RISSJES000 UREKTIE000	3 4 5 6 7 8 9 10 11	APT .		733 218 88 204 433 43 721 721 725	Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV Scramble, WV	55555 55555 55555 55555 55555 55555 5555		no no no no no no no no no no		

Figure 11 - You can expand a record in the Mailing Address Master to view additional information.

Editing a Mailing Address

You can edit mailing addresses from the Mailing Address Master. This is helpful if a mailing address was incorrectly entered.

To edit a mailing address:

- 1. Go to Student Management\Advanced Features\AD\MA.
- 2. Locate the address in the list. Select the address, and then click Edit.

- 3. Configure the Mailing Address Maintenance screen. This screen is very similar to the Address Maintenance screen shown in Figure 10 (page 35). Table 5 describes the options on this screen.
- 4. Click Save.

Deleting a Mailing Address

You can delete a mailing address that you no longer need. The Delete button is available only when you select addresses that have no occupants.

To delete a mailing address:

- 1. Go to Student Management\Advanced Features\AD\MA.
- 2. Locate the address in the list. Select the address, and then click Delete. The following message appears:

"Are you sure you wish to delete this record?"

3. Click Yes.

Accessing Address Reports

There are two reports available for your use in the Address module: the Address Range Defaults Report and the Student Address Mismatches Report.

To access Address Reports:

• Go to Student Management\Advanced Features\AD\RE.

Address Range Defaults Report

The Address Range Defaults Report displays Address Range Defaults records if they've been added under Codes (Student Management\Advanced Features\AD Setup\CO\AR). Address Range Defaults records are used with Address Paths, and is outside the scope of this Guide.

Student Address Mismatches Report

Students may not have an address if they don't have a primary guardian record, or if their primary guardian doesn't have an address. Occasionally, a student's address can be different than their current primary guardian's address. The Student Address Mismatches Report helps you identify students who have missing or incorrect addresses so you can correct them.

The report can generate one or more of the following outputs:

- Student has a different address than the primary guardian.
- Student has no primary guardian.
- Student has no address.

For students whose address is different than their primary guardian's address, you can choose to update the student's address to match their guardian's address as part of running the Address Mismatches Report. You have the following update options:

- Update student's address to match, unless guardian's address is blank
- Update student's address to match, even when guardian's address is blank

Configuring Codes in the Address Module

There are several codes that you can configure as part of using the Address module.

To configure codes in the Address module:

• Go to Student Management\Advanced Features\AD Setup\CO.

Each of these codes is described in Table 6 below.

Code	Purpose
Address Maintenance	Address Maintenance provides another way to access the Address Master. To learn more about the Address Master, see " <u>Using the Address Master</u> " (page 33).

Code	Purpose
Address Range Defaults	An Address Range Defaults record contains a range of addresses. You and your district determine which addresses fall within each Address Range Defaults record based on how your Address Paths are configured. The use and configuration of Address Paths, including Address Range Defaults, is outside the scope of this Guide.
County Codes	Used to identify the county that an address is in.
Dwelling Codes	Identifies the types of dwellings that students live in, such as houses, townhomes, apartments, and so on.
Hazard Codes	Identifies potentially hazardous conditions at addresses.
Mail Category Codes	Identifies special groups of people within your district that need to receive specific mailings. For example, if your district serves students from surrounding districts, you can add a Mail Category Code OSB – Outside Boundaries, and attach it to the Family's (address) record (Student Management\Students\ST\ PR\ Family) so they can receive mailings specifically targeted to these students and their families.
Street Names	The Street Name Codes table contains all of the Street Names that exist in your district's database.
Township Codes	If your local area is divided into townships, you can enter Township Codes to be attached to individual Address records.

Code	Purpose
	Each U.S. address entered in the system should have a corresponding ZIP code. ZIP Codes are stored in the system along with their corresponding City and State.
ZIP Codes	Tip : Each numeric ZIP code can only be entered into the system once. However, in some cases you may have two towns with the same ZIP code. In this instance, you can add the second town's ZIP code with an alphabetic character immediately following the five-digit ZIP.
	For example, Bothell, WA has a ZIP of 98011. This ZIP code of 98011 is also assigned to Kenmore, WA. In this scenario, you can first add the ZIP code for Bothell as 98011. You would then add the ZIP code for Kenmore as 98011K, allowing you to have two different towns with the same numeric ZIP code. The alphabetic character is not printed
	ZIP code. The alphabetic character is not printed on mailing labels.

Table 6 - Codes available in the Address area of the Advanced Features module

Using Configuration Options

The Address module has one configuration option available: Address Path Year. This configuration option is used when your district or Entity is using Address Paths. Address Paths are used to identify which schools (Elementary, Middle School, High School) students will attend as they progress through grade levels, based on their home address.

The use of Address Paths is outside the scope of this Guide.

Accessing Address Utilities

There are several utilities available that can help keep the addresses in your Address Master consistently formatted. These utilities may be helpful if your district has had issues with returned mailings due to incorrectly formatted addresses, or when addresses have been entered by multiple users and are formatted inconsistently as a result. Each utility is discussed in the following sections.

To access Address Utilities:

• Go to Student Management\Advanced Features\AD Setup\UT.

Punctuation Removal

You can use the Punctuation Removal Utility to remove all punctuation marks, such as periods or commas, from addresses. For example, the utility would update the address "123 N.E. APPLE ST." to be "123 NE APPLE ST." This utility does **not** provide a preview. When the utility completes, a report generates to show the changes that were made to the addresses.



Figure 12 - The Punctuation Removal Utility does not require you to set any parameters.

Right Justify

You can use the Right Justify Utility to update the Street Number and SUD (secondary unit designator, for example, "APT" for "apartment") number to be right justified. This utility is typically only used to clean up inconsistently formatted Address records when a district is in the process of converting to Skyward's School Management System. You do not have to configure any parameters to run the utility (Figure 13).



Caution When you select Run, the utility processes and cannot be aborted.

Right Justify Uti	lity	
Right Justify Utility This process right justif	ies the Street\SUD Number for <u>ALL</u> addresses.	Run Back
Example: "4535"	Becomes: " 4535"	

Figure 13 - The Right Justify Utility does not require you to set any parameters.

Mass Removal of Unused Mailing Addresses

The Mass Removal of Unused Mailing Addresses Utility can be used to identify mailing addresses that are no longer in use (have no occupants), and mass remove those records. You do not have to configure any parameters to run the utility (Figure 14), and when you run the utility in Report & Delete mode, you are *not* provided an opportunity to abort the process.

Tip	Before you run this utility in Report & Delete mode, run it in
	Report Only mode. The Report Only mode generates a report of
	the mailing addresses that will be deleted when you run the
	utility in Report & Delete mode.

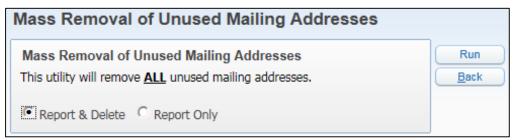


Figure 14 - You can run the Mass Removal of Unused Mailing Addresses Utility in Report & Delete or Report Only mode.

Mass Address Change

You can use the Mass Address Change Utility to specify a range of addresses that need to be changed, and the change that should be made. This utility is useful when you have multiple instances of the same type of data that need to be changed. For example, if an unincorporated area is annexed, street names or other parts of addresses in the annexed area may change. The utility provides a preview of proposed address changes, so you can review the information that will be changed prior to making any changes. When you run the Mass Address Change Utility, use the Address Ranges area of the screen (upper portion of Figure 15, Area A) to specify *which* addresses need to be changed.

Use the Address Values area of the screen (lower portion of Figure 15, Area B) to specify *which* field(s) on the addresses need to be changed. The Current Value column is where you enter the value that exists on the addresses currently. The New Value column is where you enter the value you want it changed to. Each item that you enter in the Address Values area is checked independently of all others.

Example:

The city of Stanwood annexes a portion of unincorporated Snohomish County. As a result of the annexation, the portion of N. Yelton Place that lies between Buchanan St. and Washington St. (house numbers 200 through 299) is renamed to 61st AVE NW.

To make the necessary changes, you must first configure the Address Ranges as follows:

- 1. Type "N" for the Low and High St. Direction.
- 2. Type "200" and "299" for the Low and High St. Number.
- 3. Type "Yelton Place" for the Low and High St. Name.
- 4. Select Both for the St. Side.

This sets a range that includes all houses on N Yelton Place that are numbered between 200 and 299.

Since you want to change the Street Direction and Street Name for these houses from N Yelton Place to 61st AVE NW, you must configure the Address Values as follows:

- 1. Type "N" in the St. Direction box in the Current Value column.
- 2. Leave the St. Direction box blank in the New Value column.

- 3. Type "Yelton Place" in the St. Name box in the Current Value column.
- 4. Type "61st AVE NW" in the St. Name box in the New Value column.

Note	Districts can enter a specific Zip Code value under the District Information Configuration screen (Product Setup\Skyward Contact Access\DS\ CF\DI). If set, the default Zip Code value appears in the Zip Code box in the Current Value column.
	 If you are not changing the Zip Code as part of your mass change, highlight the value in the Zip Code box and press the Delete key on your keyboard.
	 If you are changing the Zip Code as part of your mass change and the default Zip Code is incorrect, highlight the value in the Zip Code box and enter the correct value.

Address Change			
nplate Settings			
* Template Descriptio	n: N Yelton Place to 61st Ave NW		
	Share this template with other u	isers in entity 401	
ity Information - Please Read			
process will take all addresses in the distri	ct that fall into the Address Ranges	and change them according to the F	Address Values.
ddress Ranges			
ny address that fits the Address Ranges	entered here may be modified by this	process.	
o have this process only affect certain addr	esses, these Ranges must be filled in	with the specific address information	on.
Low	High	Low	High
St. Direction: N	N	Township:	ZZZ
St. Number: 200	299	Dwelling:	ZZZ
St. Name: Yelton Place	Yelton Place	Hazard:	ZZZ
Apartment:	ZZZZZZ	Census Area:	222222222
P.O. Box:	ZZZZZZ	Census Sub Area:	ZZZZZZZZZZ
Address 2:	2222222222222222222222222	Horizontal Coord:	ZZZZZZZZZZZZZ
Carrier:	ZZZZZZ	Vertical Coord:	ZZZZZZZZZZZZ
Zip Code:	ZZZZZZZ	CY Path:	22222222
Zip + 4:	ZZZZ	NY Path:	ZZZZZZZZZ
County:	ZZZ	Own/Rent: A - All	
St. Side: 🔿 Odd 🛛 Even 🖲 Both		Confidential: B - Both	(o/c) V
<u> </u>			
ddress Values			
ny address that fits the Address Ranges	antered above will have each field bel		
	entered above will have each held bei	ow where the Current Value match	ies what is on the address changed to
e New Value. ?	entered above will have each heid bei	ow where the Current Value match	hes what is on the address changed to
	entered above will have each held bei	ow where the Current Value match	nes what is on the address changed to
	entereo above vin nave each neia bei	w where the Current Value match	B
New Value.	ndred above min have each neid ben		B
New Value. 2			B
New Value. 🗹 Current Value St. Direction: N			B
Vew Value. 2 Current Value St. Direction: N St. Number:		New Value	В
New Value. 2 Current Value St. Direction: N St. Number: St. Name: Yelton Place		New Value	В
Current Value Current Value St. Direction: N St. Number: St. Name: Yelton Place Apartment:		New Value	В
New Value. Current Value St. Direction: St. Number: St. Name: Yelton Place Apartment: P.O. Box:		New Value	В
New Value.		New Value	В
Vew Value. Current Value St. Direction: St. Number: St. Name: Yelton Place Apartment: P.O. Box: Address 2: Carrier:		New Value	В
New Value.		New Value	В
New Value.		New Value St. Name: 61st AVE NW	В
New Value.		New Value St. Name: 61st AVE NW	В
New Value.		New Value	В
New Value.		New Value St. Name: 61st AVE NW	В
New Value. Current Value St. Direction: St. Number: St. Name: Yelton Place Apartment: P.O. Box: Address 2: Carrier: Zip Code: Zip + 4: County: Township: Dwelling: Hazard: Census Area:		New Value	В
New Value.		New Value	В
New Value. Current Value St. Direction: N St. Number: St. Number: St. Number: St. Number: St. Name: Yelton Place Apartment: P.O. Box: Address 2: Carrier: Zip Code: Zip Code: Zip + 4: County: Township: Dwelling: Dwelling: Hazard: Census Area: Census Sub Area: Horizontal Coord:		New Value	В
New Value. Current Value St. Direction: St. Number: St. Number: St. Name: Yelton Place Apartment: P.O. Box: Address 2: Carrier: Zip Code: Zip + 4: County: Township: Dwelling: Hazard: Census Area: Census Sub Area: Horizontal Coord: Vertical Coord:		New Value St. Name: 61st AVE NW St. Name: 61st AVE NW County: ↓▼ Township: ↓▼ Hazard: ↓▼ Hazard: ↓▼ County: ↓ County: ↓▼ County: ↓ County: ↓▼ County: ↓ County: ↓▼ County: ↓ County:	В
New Value.		New Value	В
Current Value Current Value St. Direction: St. Number: St. Name: Yelton Place Apartment: P.O. Box: Address 2: Carrier: Zip Code: Zip + 4: County: Township: Dwelling: Dwelling: Hazard: Census Area: Census Area: Census Sub Area: Horizontal Coord: Vertical Coord:		New Value St. Name: 61st AVE NW St. Name: 61st AVE NW County: ↓▼ Township: ↓▼ Hazard: ↓▼ Hazard: ↓▼ County: ↓ County: ↓▼ County: ↓▼ County: ↓ County: ↓▼ County: ↓▼ County: ↓▼ County: ↓▼ County: ↓▼ County: ↓ County: ↓▼ County: ↓ County: ↓ C	В

Figure 15 - Mass Address Change screen with example scenario entered in template

Street Name Standardization

You can use the Street Name Standardization Utility to make changes to addresses to help ensure that address format is consistent throughout your Address Master. The utility provides a preview of proposed address changes so you can review the information that will change, prior to any changes being made.

Caution	If your district uses third-party programs, such as transportation
	software, check with the software vendor prior to running this
	utility. Some third-party programs require addresses to be
	formatted in a specific way. Running this utility may change
	addresses in a way that is undesirable.

The utility has eight different options you can select from. Table 7 describes each of these options.

Tip	If you need to run this utility multiple times, selecting different
	standardization options, run the Standardize Suffix Abbreviations
	option last. This option looks at the last item contained in the
	Street box for standardization.

Option	Description
Merge duplicate ZIP codes	Merges numeric and alphanumeric ZIP codes when the City, State, and numeric portion of the ZIP are identical.
(primary ZIP only)	For example, if there were two ZIP codes for Bothell, WA of 98011 and 98011B, the ZIP code on all addresses using 98011B would be changed to 98011.
	Moves PO Box information out of the Street Name box and into the P.O. Box box.
Remove PO Box from Street Name	For example, an address with a Street Name of "10TH ST PO BOX 9" is changed so that the Street Name becomes "10TH ST" and "PO BOX 9" is converted and "9" is moved into the P.O. Box box.

Option	Description
	Moves street number information out of the Street box and into the Number box.
Remove Street Number from Street Name	For example, a Street Name of "123 10TH ST" is changed so that the Street Name becomes "10TH ST" and "123" moves into the Street Number box.
	Caution : Review the proposed address changes carefully when using this option, as some street names may intentionally include numbers.
	Moves apartment information out of the Street box and into the Apartment box.
Remove Apartment from Street Name	For example, an address with a Street Name of "10TH ST #2" is changed so that the Street Name becomes "10TH ST." The "#2" is converted and the utility assigns a SUD Type of APT and places the "2" in the Number box.
Remove Direction from Start of	Moves directional information from the beginning of the Street Name box into the Dir (direction) box, which is located between the Street Number and Street Name boxes.
Street Name	For example, an address with a Street Name of "E 10TH ST" is changed so that the "E" moves into the Dir (direction) box and Street Name becomes "10TH ST."

Option	Description
Remove Direction from End of Street Name	Moves directional information from the end of the Street Name into the Dir (direction) box. For example, an address with a Street Name of "10TH ST E" is changed so that the Street becomes "10TH ST" and "E" moves into the Dir (direction) box.
Standardize Suffix Abbreviations	Changes suffixes in the Street Name box to a standard format. For example, an address with a Street of "10TH STREET" is changed so that the Street becomes "10TH ST."
Individual Street Name Changes	Changes individual Street names according to the parameters you specify.

Table 7 - Options available for running the Street Name Standardization Utility

Duplicate Address Merge

You can use the Duplicate Address Merge Utility to identify any duplicate addresses that exist in the system. When you run the utility, duplicate addresses are merged and the occupants of both addresses are attached to the newly merged address. Before you run this utility in Report & Delete mode, run it in Report Only mode. The Report Only mode generates a report of the addresses that will be merged when you run the utility in Report & Delete mode.

Unused Address Deletion

The Unused Address Deletion Utility identifies addresses that are no longer in use and are contained within the ranges you entered, and deletes them. Only addresses without occupants and addresses that aren't assigned to buildings in the district are selected by this utility.

The utility does provides a preview screen so you can review the information that will change, prior to any changes being made.

Clone Address Paths

You can use the Clone Address Paths Utility to clone Address Paths from one school year to the next. This utility is not within the scope of this Guide.

Import ZIP Codes

Zip Codes can be imported into the Zip Code table from a comma-delimited (CSV) file. Typically, this utility is only used when a district is converting to Skyward's School Management System, so that ZIP codes do not have to be manually entered into the software.

Using Address Range Utilities

You can use the Address Range Utilities to make changes to students' Address Paths. These utilities are not within the scope of this Guide.

Using Entity Counts

The Entity Counts module automatically calculates a count of all students who are enrolled in your Entity. Student Counts are broken down by Grad Year, and a total Count is provided for the entire Entity. Entity Counts are also displayed for Entity 000, which provides Counts for the district as a whole. You can also manually run a utility to recount students at any point during the school year.

Accessing the Entity Counts Screen

You can review your Entity's current student Count using the Entity Counts screen. The Entity Counts screen (Figure 16) keeps track of the number of students in each Grad Year and the total number of students in each Entity. Each student who is active in the current Entity is counted. Table 8 contains additional information about the various columns that appear on the Entity Counts screen.

To access the Entity Counts screen:

• Go to Student Management\Advanced Features\EC\EC.

Hom	e 🔻 S	Students F	amilies Staff		ood ervice Office	Administration	Educator Access Plus		deral/State Reporting	Custom Reports	2	
	🕨 En	tity Coun	ts 😭					🔝 🔽 🛍	🕯 😭 Favorit	es 🔻 怕 New	Window ᢏ	My Print Que
Views	Gener	al 🗸 <u>Filters</u>	: *All Includ	led in Entity	Totals	¥				7 🔟	🖲 🙆	<u>A</u> dd
Schoo	l Year 👻	Grad Year	Grade Level	Max Students	Current Count	Unduplicated Cou	nt Available	Include In Total*				Edit
2	2015	2015	12	0	81	8	1 -81	Y			^	Delete
•	2015	2016	11	0	81	7	6 -81	Y				
•	2015	2017	10	0	84	8	1 -84	Y				Info
•	2015	2018	09	0	81	8	1 -81	Y				
•	2015	2019	08	0	4		0 -4	Y				
•	2015	2020	07	0	1		0 -1	Y				
•	2015	9999	Entity	0	331	31	7 -331	Y				
•	2014	2006		0	0		2 0	Y				
	2014	2013		0	-2		3 2	Y				
•	2014	2014		0	2		2 -2	Y				
	2014	2015		0	89	8		Y				
•	2014	2016		0	76	7		Y				
•	2014	2017		0	91	9		Y				
	2014	2018		0	75		1 -75	Y				
	2014	2019		0	6		1 -6	Y				
•	2014		Entity	0	339	25		Y				
•	2013	2006		0	0		0 0	Y				
•	2013	2012		0	0		0 0	Y				
	2013	2013		0	1		1 -1	Y				
•	2013	2014	11	0	100	10	0 -100	Y			~	

Figure 16 - The Entity Counts screen counts students for each Grad Year and can also show the number of seats remaining for each Grad Year when Max Students is configured.

NoteWhen you access Entity Counts, the default Filters selection is All
Entity Counts. You may find it more helpful to change the Filters
to Current School Year Entity Counts.

Column	Description
	Some Entities use Max Students to help them track enrollment capacity. For example, if a middle school has the capacity to accommodate 150 seventh grade students, they may want to enter a Max Students count of 150. This allows office personnel to know at a glance how many more seventh graders the middle school can accept before reaching maximum capacity.
Max Students	The Max Students box is optional and not automatically calculated. You must manually enter a value by editing individual Grad Year records.
	You can clone existing values from one school year to another by running the Clone Max Counts Utility. To learn more about this utility, see " <u>Clone Max Counts</u> " (page 56).
Current Count	The total number of active students in the Entity counted by Grad Year, regardless of their default Entity.
Unduplicated Count	Students active in the current Entity, whose default Entity is the current Entity.
Available	The difference between Max Students and Current Count.
Include in Total	Indicates whether or not a Grad Year's Count is included in the total student Count for the Entity, which is represented by the Entity 9999 row on the screen. You can edit the record to configure this option for individual Grad Years.

Table 8 - The Entity Counts screen contains several different student counts

Managing Individual Grad Year Records

It is rare that you may need to edit individual Grad Year records in the Entity Counts module.

BestDo not add or delete Individual Grad Year records, as those featuresPracticewere added for another state's use.

Accessing the Entity Counts Report

The Entity Counts Report shows the number of students in the Entity for each Grad Year and the total number of students in the Entity. You may find it helpful to run this report monthly throughout the school year on a selected day (such as count day) to keep a "snapshot" record of Entity Counts on file.

The report contains options that allow you to show a breakdown of the selected Entity Counts by the following criteria:

- Student Status
- Student Type
- Gender
- Socio-Economic Status

To access the Entity Counts Report:

• Go to Student Management\Advanced Features\EC\RE\EC.

Running Entity Counts Utilities

There are two Entity Counts utilities available for your use: Clone Max Counts and Recount Students.

To run Entity Counts Utilities:

• Go to Student Management\Advanced Features\EC Setup\UT.

Each of these utilities is described in the following sections.

Clone Max Counts

If your Entity uses the Max Students field to track enrollment capacity, you can use the Clone Max Counts Utility to clone the values in this field from one year to the next. The utility allows you to specify the school year you want to clone Max Students values from, as well as the school year to which the Max Students values should be cloned. Once you have cloned Max Students values, you can edit individual Grad Year records to make changes if needed.

Recount Students

If your Entity counts appear to be out of sync, or a message appears stating that the counts are out of sync, you can run the Recount Students Utility to update the Entity Counts. A recount may only be done for the current year and next year Entity counts.

Using the Name Maintenance Module

The Name Maintenance module is where you can manage Name records in Student Management. You can perform a number of tasks related to the Name records contained in the Name table in the Name Maintenance module.

There are two screens under the Name Maintenance module: the Name Maintenance screen and the Name Browse screen. Both areas are discussed below.

To access the Name Maintenance and Name Browse screens:

• Go to Student Management\Advanced Features\NA\NM.

Accessing the Name Maintenance Screen

The initial screen under Name Maintenance is the Name Maintenance screen (Figure 17) and it displays Name Type records. Name Types are used to identify different ways that a Name record is used in Skyward's School Management System. For example, an individual who works in your district and who is also a guardian and emergency contact for a student in your district would have four Name Types associated with their Name record: Staff, Security User, Guardian, and Emergency Contact.

The Name Maintenance screen allows you to select which type of Name records you want to view based on the Name Type. You may want to view a single Name Type or you can select to view all Name records. Typically, when you access the Name record table, you'll select the option to View All Names. However, the Name record table can contain thousands of records depending on the size of your district. So, if you're looking for only Health Professional names, selecting the Name Type of Health Professionals will provide you a manageable list of Name records that are associated with the Name Type. Table 9 provides information for each Name Type and explains how the Name Type is associated with the Name record.

NoteSome Name Types are not used in our state and others are optional
for districts to use, such as Alumni, Insurance Company, and Hospital.

WSIPC Hig	h School	(401) 💌				FS Alert	Steffanie Ws	sipccampbell A	ccount Pre	ferences	Exit ?
Home 👻 Students Fami	lies Staff	Student Services	Food Service	Office	Administration	Educator Access Plus	Advanced Features	Federal/State Reporting	Custom Reports	Q	
■ Name Mainten	ance 😭						🔝 🖻 🖬	🕯 😭 Favorites 🔻	🕈 怕 New Wir	ndow 🖷	My Print Queue
Name Types									3) 🕰	
Name Type 🔺											View Names of
ALUMNI											Highlighted Type
EMERGENCY CONTACT										\sim	
EMPLOYER											
FEE MANAGEMENT CUSTOMER											View All
FEE MANAGEMENT PAYOR											Names
FEEDER SCHOOL											
FOOD SERVICE CUSTOMER											
FOOD SERVICE PAYOR											
GUARDIAN											
HEALTH PROFESSIONAL											
HOSPITAL											
INSTITUTION											
INSURANCE COMPANY											
ORGANIZATION											
PUBLISHER											
SECURITY USER											
STAFF											
STUDENT											
<										>	
18 records displayed							Nam	e Type:		ABC	

Figure 17 - Before you view specific Name records, you select which Name Type(s) you want to work with

Name Type	Description	Format
Alumni	An <i>optional</i> designation that may be used to indicate that an individual is a graduate of your district. This Name Type is not added to students automatically once they graduate. You must manually add the Alumni Name Type to staff and or students through Name Maintenance.	Individual

Name Type	Description	Format
Emergency Contact	Automatically applied to all Name records assigned to a student's record as an Emergency Contact. To learn more about Emergency Contacts, see the WSIPC Guide to Student Demographics and Families.	Individual
Employer	Designates that an individual or a business is an employer. You can add the Employer Name Type to name records through Name Maintenance.	Individual or Business
Fee Management Customer	Automatically applied to all Name records that exist as Customers in the Fee Management module. To learn more about Fee Management Customers, see the <i>WSIPC Guide to Fee Management</i> .	Individual
Fee Management Payor	Automatically applied to all Name records that exist as Payors in the Fee Management module. To learn more about Fee Management Payors, see the <i>WSIPC</i> <i>Guide to Fee Management.</i>	Individual
Feeder School	School that a student attended prior to the Entity they are currently enrolled in. You must manually add the Feeder School Name Type through Name Maintenance.	Business
Food Service Customer	Automatically applied to all Name records that exist as Customers in the Food Service module. To learn more about Food Service Customers, see the <i>WSIPC</i> <i>Guide to Food Service Administration and</i> <i>Management</i> .	Individual
Food Service Payor	Automatically applied to all Name records that exist as Payors in the Food Service module. To learn more about Food Service Payors, see the <i>WSIPC Guide to</i> <i>Food Service Administration and Management</i> .	Individual
Guardian	Automatically applied to all Name records that are listed as a guardian for one or more students. To learn more about guardians and student records, see the <i>WSIPC Guide to Student Demographics and Families</i> .	Individual

Name Type	Description	Format
Hospital	Allows you to identify hospitals. You can add a preferred hospital to the Emergency Info sub-tab in Student Profile. To learn more about Student Profile, see the <i>WSIPC Guide to Student Demographics and Families</i> .	Business
Health Professional	Identifies people who perform health examinations or tests, make diagnoses, and report accidents or injuries. Examples include doctors, registered nurses, physician's assistants, health room aides, or psychologists. To learn how Health Professionals are used in the Health module, see the <i>WSIPC Guide to</i> <i>Health Records.</i>	Individual
Insurance Company	Identifies health insurance companies that are attached to student records on the Emergency Info sub-tab in Student Profile. To learn more about Student Profile, see the <i>WSIPC Guide to Student</i> <i>Demographics and Families</i> .	Business
Organization	Identifies organizations to which a guardian belongs.	Business
Publisher	Identifies publishers of textbooks and educational materials that are distributed to students. To learn more about the Textbook module, see the <i>WSIPC Guide to Textbook</i> .	Business
	You must manually add the Provider Name Type to a Name record through Name Maintenance.	
Student	Automatically applied to all students when they are added to the software. To learn how to add a student to the software, see the <i>WSIPC Guide to Student</i> <i>Demographics and Families</i> .	Individual
Staff	Automatically applied to all staff members when they are added to the software.	Individual
Security User	Automatically applied to all secured users when they are added to the software. To learn how to add a Secured User, see the <i>WSIPC Guide to Security</i> .	Individual

Table 9 - Name Types that apply to records found in Student Management

Working with the [Name Type] Browse Records

Once you've selected which Name Type records you want to view, all records associated with that Name Type display on the [Name Type] Browse screen where [Name Type] equals the Name Type of records in the list. For example, if you select Name Type of Health Professionals on the previous screen, the title would be Health Professionals Name Browse. If you select View All Name on the previous screen, the title would be All Names Browse (Figure 18).

You can expand a Name record to view details about the record, such as basic demographic information, address, and the Name Types that are attached to each Name record. Certain Name Types can be expanded to display further details about the record. For example, a Name Type of Guardian can be expanded to show a list of student(s) who belong to that guardian.

Additionally, Name records are in one of two formats: Individual and Business. The information contained in the Name record for each format is different. For example, an individual's Name record may contain information such as gender. Since a business does not have a gender, this information is not included on Name records that are formatted for businesses.

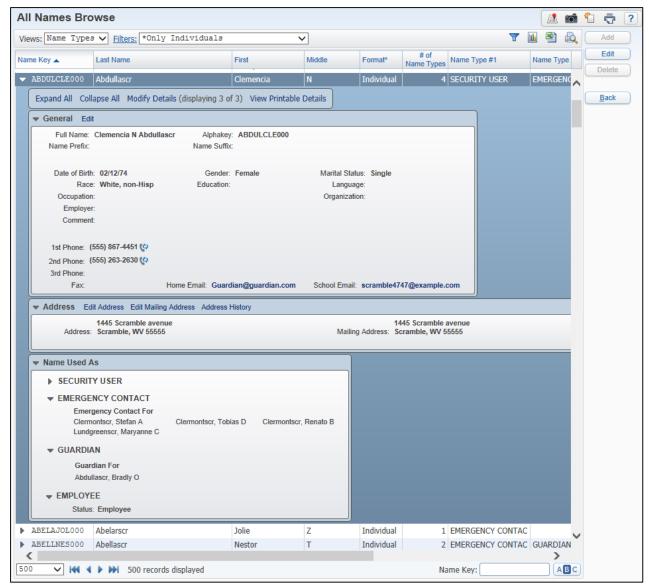


Figure 18 - A Name record in the All Names Browse that has four Name Types attached to it: Security User, Emergency Contact, Guardian, and Employee.

AREA	PURPOSE OF AREA
General	Expand to view basic demographic information associated with the Name record, such as a phone number or email address. To learn how to edit a Name record's demographic information, see " <u>Editing a Name Record</u> " (page 65). To learn more about the codes used in Name Maintenance, see " <u>Configuring Name Maintenance Codes</u> " (page 71).

AREA	PURPOSE OF AREA
Address	Expand to view the address and mailing address associated with the Name record. You can also access the Address History from this area. To learn how to edit a Name record's address information, see " <u>Editing Addresses and</u> <u>Mailing Addresses</u> " (page 70).
Name Used As	Expand to view additional information about the records that the selected Name is attached to. For example, shows a Name record that has Name Types of Emergency Contact and Guardian. The Name Used As area for this person shows that they are an Emergency Contact for two students, and a Guardian for two students.

Table 10 – Sub-areas can be expanded on the Name record screen

Adding a Name Record

You can add some types of Name records to the system from the Name Maintenance screen. If a Name record is related to a specific module, you may not be able to add the Name record from Name Maintenance. The record would instead need to be added from the appropriate module.

You can add Name records for the following Name Types in Name Maintenance:

- Alumni
- Employer
- Feeder School
- Health Professional
- Hospital
- Insurance Company
- Organization
- Publisher

To add a Name record:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Select a Name Type, and click View Names of Highlighted Type.
- 3. Click Add. The screen that appears varies, depending on the Name Type you selected in step 2.

- 4. Enter the name to be added, and select Click Here To Search for Entered Name.
- 5. Do one of the following:
 - If no matching name is found, click Add Entered Name as [Name Type]. Proceed to step 6.
 - If a matching name is found, select it, and click Select Name And Add As [Name Type]. The Name record is added to the Name Type.
- 6. Enter an address for the Name record on the [Name Type] Address screen, and click Continue Add.

Note	If you do not want to enter an address for the Name
	record, click No Address.

- Configure the Name Information screen (Figure 19). To learn more about some of the options on this screen, see Table 11 in "<u>Configuring Name</u> <u>Maintenance Codes</u>" (page 71).
- 8. Click Save.

1st Phone: Ext: PCat: Ist Phone Confidential Fax: Ist Phone Long Distance 2nd Phone: Ext: PCat: Work Address: Home Email:	lame Information * First: M <u>Name Suffix:</u>		<u>1</u>	Middle Iame Prefix		.		ast: Ackerleyscr Key: ACKERMEL000	
Race: Image: Age: Octotact Information 1st Phone: Ext: PCat: Ist Phone Long Distance Ist Phone: Ext: PCat: Work Address: Ist Phone: Ext: PCat: Work Address: Ist Phone: Ext: PCat: Work Address: Ist Phone: Ext: PCat: Work Address: Ist Phone: Ext: PCat: Vother Ist Phone: Ext: PCat: Vother Ist Phone: Employer: Ist Prover:	emographic Info	rmation							
Contact Information Ist Phone: Ext: PCat: Ist Phone Confidential Fax: Ist Phone Long Distance Address: Address: Home Email: Other Information Employer: Organization:	Gender:	•			Marital	Status:	•	Date of Birth:	
Ist Phone Long Distance 2nd Phone: Ext: PCat: Work Address: ard Phone: Ext: PCat: Other Image: State of the state of th	Race:	•			Lan	quage:	•	Age: 0	
Ist Phone Long Distance 2nd Phone: Ext: PCat: Work Address: ard Phone: Ext: PCat: Other Imployer: Imploye	Contact Informati	on							
2nd Phone: Ext: PCat: Work Address: 3rd Phone: Ext: PCat: Other Cother Information Employer: Organization: Occupation:	1st Phone:		Ext:	E	Cat:				
And Phone: PLat: V Other V Home Email: Other Information Employer: V Organization: V Occupation: V	2nd Phone:		Ext:	E	Cat:				
Home Email:	3rd Phone:		Ext:	E	Cat:	 Other 	•		
Employer: Organization: Occupation:	Home Email:								
Organization:)ther Information								
Occupation:	Employer:	-							
	Organization:	•							
Education:	Occupation:	•							
	Education:	•							
Comment:	Comment:								

Figure 19 - Example of the Name Information screen when adding a Name record for an Individual

Editing a Name Record

You can edit the demographic information stored with existing Name records from the Name Maintenance screen.

Note	Demographic information for Names that have a Name Type of
	Employee cannot be changed within Name Maintenance.
	Changes to demographic information for Employee Name records
	must be done through Human Resources, not Student
_	Management.

To edit a Name record:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Do one of the following:
 - Select a Name Type, and click View Names of Highlighted Type.
 - Click View All Names.

- 3. Select the desired record.
- 4. Click Edit.
- 5. Make the necessary updates to the General Information screen. This screen contains different information, depending on whether the Name record being edited belongs to an individual (Figure 20) or a business (Figure 21).
- 6. Click Save.

* First Name: ELLENE Middle Name: F * Last Name: ABADISCR Name Prefix: Name Prefix: Name Suffix: Name Key: ABADIEIL000 Gender: Marital Status: Date of Birth: Image:	emographic Inform	ation					Sa
Name Pretix: Name Suffix: Gender: Marital Status: Race: Language: Contact Information 1st Phone: [555] 267-1413 Ext: Type: Cellular 3rd Phone: [555] Ext: Type: Work Fax: [555] Ermail: scramble9729@example.com Comparization: Organization: Contact Information	* First Name: EILENE		Middle Name: F		* Last Name:	ABADISCR	Ba
Race: Language: Contact Information 1st Phone: (555) 567-2959 Ext: 1st Phone Confidential 1st Phone Long Distance 2nd Phone: (555) 267-1413 Ext: Type: Cellular ard Phone: (555) Ext: Type: Verter Fax: (555) Email: scramble9729@example.com Other Information Employer: Imployer: Imployer: <tr< th=""><th>Name Prefix:</th><th>•</th><th>Name Suffix:</th><th>•</th><th>Name Key:</th><th>ABADIEIL000</th><th>Cha For</th></tr<>	Name Prefix:	•	Name Suffix:	•	Name Key:	ABADIEIL000	Cha For
Contact Information 1st Phone: (555) 2for 2959 Ext: Type: Cellular 3rd Phone: (555) Ext: Type: Vor k Fax: (555) Email: scramble9729@example.com Other Information Employer: V Organization: Contact Information	Gender:		Marital Status:	•	Date of Birth:		
2nd Phone: (555) 267-1413 Ext: Type: Cellular 3rd Phone: (555) Ext: Type: Work Fax: (555) Ext: Type: Work Fax: (555) Ext: Type: Work Other Information Employer: Occupation: Education: Education: 	Race:	•	Language:	•			
1st Phone: (555) 567-2959 Ext: 1st Phone Confidential 1st Phone Long Distance 2nd Phone: (555) 267-1413 Ext: Type: Cellular 3rd Phone: (555) Ext: Type: work Fax: (555) Ext: Type: work Fax: (555) Ext: Type: work Other Information Employer: Occupation: Education: Education: 	ontact Information						
2nd Phone: (555) 267-1413 Ext: Type: Typ		567-2959 Ext	1st Phone	Confidential 🗌 1st Ph	one Long Distanc	2	
3rd Phone: [555] Exx: [555] Email: scramble9729@example.com Other Information Employer: Occupation: Education: 					one Long Distance	-	
Fax: (555) Email: scramble9729@example.com Other Information Employer: Organization: Education:							
Email: scramble9729@example.com Other Information Employer: Organization: Education: Education:			i)pol noin				
Other Information Employer: Organization:		le9729@example.co	m				
Employer: Image: Constraint of the second		iosi 25 e onan prote					
Employer: Image: Constraint on the second							
Organization: Education:							
	Employer:	-		Occupation:	•		
Comments:	Organization:	-		Education:	•		
	Comments:						

Figure 20 - The General Information screen for a Name record belonging to an individual (in this case, an Emergency Contact).

emographic Informatio	on		Save
* Business Name: 2 - F			Back
Name Key: 2 - F			Chang
Contact Person:			
State Code:			
Contact Information 1st Phone:	Ext:	□ 1st Phone Confidential □ 1st Phone Long Distance	
2nd Phone:	Ext:	Type: Work	
3rd Phone:	Ext:	Type: Other	
Fax:			

Figure 21 - The General Information screen for a Name record belonging to a business (in this case, a Feeder School).

Changing a Name Record's Format

You can change the format of a Name record. This may be useful if a Name record was entered with an incorrect format.

To change a Name record's format:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Do one of the following:
 - Select a Name Type, and click View Names of Highlighted Type.
 - Click View All Names.
- 3. Select the desired record.
- 4. Click Edit.
- 5. Click Change Format. A message appears asking you to confirm that you want to change the format of the name.
- 6. Click Yes.

- 7. Configure the General Information screen (Figure 21).
- 8. Click Save.

NoteAdditional popup messages may appear asking you to make choices
relevant to the Name Type you are converting. For example, the
following message may appear:"This Guardian has a School Email which is not applicable for
his/her name types. Would you like to remove the School Email?"

Click Yes or No.

Deleting a Name Record

You can use Name Maintenance to delete Name records that are no longer needed. In order to delete a Name record, all Name Types associated with the Name must be removed.

You can remove some Name Types from Name Maintenance, but you cannot remove Name Types that are currently associated with a Student record. For example, a Name Type of Guardian indicates that the Name record is currently attached to a student as their Guardian. Before you can delete this Name record from the system, you must first remove the Name as the student's Guardian.

To delete a Name record:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Do one of the following:
 - Select a Name Type, and click View Names of Highlighted Type.
 - Click View All Names.
- 3. Select the desired record.
- 4. Click Delete.

Note	The Delete button is not available for Name records that cannot
	be deleted from Name Maintenance.

Removing Name Types from a Name Record

You can remove some Name Types from a Name record in the Name Maintenance screen. You cannot remove Name Types that are currently associated with another record in Skyward's School Management System. For example, you cannot remove the Name Type of Emergency Contact from a Name record, because it indicates that the Name record is associated with a student as their Emergency Contact.

To remove a Name Type from a Name record:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Do one of the following:
 - Select a Name Type, and click View Names of Highlighted Type.
 - Click View All Names.
- 3. Expand the desired record.
- 4. Expand the Name Used As area.
- 5. Click Remove Type. A message appears, asking you to confirm that you want to delete the record.
- 6. Click Yes.

If the Name Type is attached to any other Name records, a message appears to advise you that the Name Type cannot be deleted. Otherwise, the record is deleted.

Editing Addresses and Mailing Addresses

You can edit the address and mailing address attached to a Name record from the Name Maintenance screen. However, this is not recommended as a best practice.

Best	Edit addresses and mailing addresses from the area in which the
Practice	name is used. For example, to edit a student's address or mailing
	address, use the Family sub-tab in Student Profile (Student
	Management\Students\ST\PR).
Note	Demographic information, including address and mailing
	address for Names that have a Name Type of Employee cannot
	be changed within Name Maintenance. Changes to
	demographic information for Employee Name records must be
	done through Human Resources.

Viewing Address History

You can view the address history of Name records in Name Maintenance. Not all address history is available. For example, you cannot view address information for Names with a Name Type of Employee in a combined database. These records are confidential.

To view address history:

- 1. Go to Student Management\Advanced Features\NA\NM.
- 2. Do one of the following:
 - Select a Name Type, and click View Names of Highlighted Type.
 - Click View All Names.
- 3. Expand the desired record.
- 4. Click Address History.
- 5. When you've finished viewing the address history, click Back.

Configuring Name Maintenance Codes

There are several codes that you can configure as part of the Name Maintenance module. These codes are district-wide and used throughout the module to provide additional information in a Name record. Each of these Name Maintenance Code Types is described in Table 11.

To configure Name Maintenance Codes:

Code	Purpose
Ancestry Codes	Identifies students' ethnic origins. This code is typically entered during the process of adding a new student. You cannot delete an Ancestry Code from the Name Maintenance Code table if it is assigned to an individual.
Language Codes	Designates languages spoken and understood by students, their guardians, and emergency contacts. To learn how Language Codes are attached to student records, see the <i>WSIPC</i> <i>Guide to Student Demographics and Families</i> .
Name Prefix Codes	Identifies a title that is attached to the beginning of an individual's name, such as Ms. or Dr. You cannot delete a Name Prefix Code from the Name Maintenance code table if it is assigned to an individual.
Name Suffix Codes	Identifies a title that is attached to the end of an individual's name, such as Jr. or Sr. You cannot delete a Name Suffix Code from the Name Maintenance code table if it is assigned to an individual.

• Go to Student Management\Advanced Features\NA Setup\CO.

Code	Purpose
Occupations	Identifies occupations associated with Individual Name records. You cannot attach an Occupation to a Name record that is formatted as a Business. You cannot delete an Occupation Code if it is assigned to a Name record that is formatted as an Individual. To learn how Name records are formatted, see "Accessing the Name <u>Maintenance Screen</u> " (page 57).
Phone Categories	Identifies additional information attached to a phone number. For example, you can create a Phone Category Code of LD to identify those phone numbers that are long distance.
Race Codes	Used to populate students' Local Race field. Since Local Race is no longer used for State Reporting, some districts have chosen not to use Race Codes.
	To learn how students' ethnicity and race are entered into Skyward's School Management System, see the <i>WSIPC Guide to Student</i> <i>Demographics and Families</i> .

Table 11 - Codes available in Name Maintenance

Running Name Maintenance Reports

In the Name Maintenance module, there are three reports to assist you in reviewing and maintaining the data integrity of Name records.

To run Name Maintenance Reports:

• Go to Student Management\Advanced Features\NA\RE.

Name Suffix Report

The Name Suffix Report reviews all Name records in the database and generates a list of all suffixes currently in use as well as a total count of the suffixes. A suffix is an identifier that follows a name, such as "Jr." or "Sr."

Address Change Report

The Address Change Report allows you to select a date range and view all address changes that were entered during the date range. You can use this report to track address changes over a specific period of time. The report lists the name key of each Name record for which an address has been changed, along with their Name Type(s), the changes made, and the name of the person who made the changes. To learn more about Name Types, see "<u>Accessing the Name Maintenance Screen</u>" (page 57).

Duplicate E-Mail Addresses Report

The Duplicate E-Mail Addresses Report allows you to select a Name Type and then print all other records that share an email address with records of your selected Name Type. You can also use this report to print records of a selected Name Type that have blank email addresses. This report can be helpful when you want to identify Name records that may have incorrect email addresses. To learn more about Name Types, see "<u>Accessing the Name Maintenance Screen</u>" (page 57).

Running Name Maintenance Utilities

The following two utilities are available for your use in Name Maintenance:

- Mass Create Email Addresses Utility
- Upper and Lower Case Utility

This section explains each of these utilities.

Mass Create Email Addresses Utility

You can use the Mass Create Email Addresses Utility to create email addresses for a group of people of a specific Name Type, according to a formula that you define. This utility can overwrite all, existing, or blank email addresses.

Email Addresses can also be imported from a file using the Mass Create Email Address Utility.

To run the Mass Create Email Addresses Utility:

1. Go to Student Management\Advanced Features\NA Setup\UT\EM.

2. In the Name Type box, select a Name Type.

The screen refreshes and lists names of the selected Name Type, along with a Name Key (Alphakey) and Email Address for each name. This allows you to view the existing information that is currently attached to each Name record. Figure 22 shows the Mass Create Email Address screen with the Name Type of Student selected. Table 12 describes the options on this screen.

- 3. Configure the Email Details area of the screen. As you make selections, the data in the Example box changes to represent the format of the newly created email addresses.
- 4. Do one of the following:
 - Click Process. The utility runs immediately.
 - Click Process List. Then, select a processing list and click Print. The utility runs immediately.

	ident 🔽 🚺	port E-Mail Addresses fro			
Views: General	Filters: *Skyward Default •		T	🕙 🙇 [Back Name Used As
Name Key 🔺	Name	Email Addres	s		Fee Manage Cust Fee Manage Payor
ACETOALE000	Acetoscr Alex K	scrambleho	me1520@scr36.com		Food Serv Cust
ACETOJAS000	Acetoscr Jasper I				Food Serv Payor Student
ACETOMIC000	Acetoscr Michaele Y	scrambleho	me7110@scr36.com	E	Student
ACEYSPAL000	Aceyscr Palmer K	scrambleho	me2580@scr36.com		
ACKERBER000	Ackerleyscr Bertram L	scrambleho	me5520@scr36.com		
ACKEREMO000	Ackerleyscr Emory N				
ACKEREZE000	Ackerleyscr Ezekiel J	scrambleho	me5608@scr36.com		
ACRESCAT000	Acrescr Catrina N	scrambleho	me2555@scr36.com		
ACRESRON000	Acrescr Ronald M	scrambleho	me3346@scr36.com		
ACTISDEL000	Actisscr Delmar Z	scrambleho	me12573@scr36.com		
ACYSCARN000	Acyscr Arnold T	scrambleho	me1988@scr36.com		
ACYSCTAR000	Acyscr Taryn R	scrambleho	me1493@scr36.com	-	
•			21220 22	•	
100 🖵 候	100 records displayed		Name Key:	ABC	
Email Details					
Entry 1	Entry 2	Entry 3	Unique Identifier		Domain
Define Leng	th 💌 Define Length 💌		 Incrementer 	- @	schooldistrict.edu
E	ample: NormaMort###@schooldistrict.	edu			
]			
Entry 1			Entry 2		
Define Lengt	h of: First Name	Length: 5	Define Length of: Last Name	•	✓ Length: 4
			Processing Options		
Entry 3			Overwrite: C All C Existing	G at 1	Process Proc List

Figure 22 - When you use the Mass Create Email Addresses Utility, you specify the criteria used to generate email addresses.

Option	Description
Entry 1 Entry 2 Entry 3	Identifies information to use to generate part of the email address: first name, middle name, last name or Namekey. You can also select Define Length from the drop-down list to activate the Define Length of: option below. This allows you to include only part of the selected piece of data in the email address.
Unnamed fields following Entry 1 and Entry 2	Freeform text that is added in these boxes to the email address immediately after the selections you have made in Entry 1 and Entry 2. For example, you could select the Last Name for Entry 1, enter a "." in the freeform text box and select the First Name for Entry 2. If the student's name was John Smith, the beginning of his email address would be Smith.John.

Option	Description
Unique Identifier	Appends an identifier to the end of the email address to make it unique. You can select from Incrementer (001, 002, etc.), Last 3 of Name Key, or Last 4 of SSN.
Domain	The portion of the email address that follows the @ sign. For example, in the email address JoeStudent@district.edu, the Domain is "district.edu."
Define Length of: Length	Enabled when you select the value Define Length for Entry 1, Entry 2, or Entry 3. You first select what you want to define the length of, and then enter a numerical value in the Length box. This allows you to include a specified number of characters of the selected piece of data in the email address. For example, in Figure 22, Define Length of has been set to First Name, with a Length of 5. This means that the first five characters of the first name are used when generating an email address.
Overwrite	Overwrite options are, All, Existing, or Blank.
Process: Only Students/Staff Active in Entity ### All Students/Staff Active in Entity	Only available when you select a Name Type of Staff or Student. It allows you to select only active staff/students in the current Entity, or all staff/students in the current Entity.

Table 12 - Options available on the Mass Create Email Address screen

Upper and Lower Case Utility

The Upper and Lower Case Utility allows you to convert data in the Name and Address boxes to your preferred case. This utility works in conjunction with the Default Case options (Figure 23) selected in District Information Configuration (Product Setup\Skyward Contact Access\DS\ CF\DI). If you make a change to the Default Case options, run the Upper and Lower Case Utility afterward to ensure that the names and addresses are all the same case.

District Information	Configuration	
District Information		Save
Administrator:	Marty Daybell	Back
District Name:	WSIPC School District	
District Web Site:	http://www.wsipc.org	
State:	WA Country: USA 🔹	
District Code:	55555 VWSIPC School District PUB	
Educational Service District:	101 - ESD 101 -	
Banner Page Printer Prefix:		
	Use Local Defined Notes	
	Combined Student and Business Database	
Database Purpose:	WSIPC School District	
System Defaults		
Zip Code: 55555	 Scramble WV 	
Area Code: 555		
2nd Phone Type: Work	▼ 3rd Phone Type: Cellular ▼	
Default Case Name Fields: UPPER CAS Address Fields: UPPER CAS		

Figure 23 - You can set the default case for text entered into Name and Address boxes throughout the system in District Information Configuration.

To run the Upper and Lower Case Utility:

- 1. Go to Student Management\Advanced Features\NA Setup\UT\UL.
- 2. Click Add to create a new template.
- 3. Configure the settings on the utility's screen (Figure 24). Table 13 describes the options on this screen.
- 4. Click Save and Run. After the utility runs, a report displays the number of each type of record that was changed.

	🥂 🖬 🕤 📅 [
Template Settings	Save
* Template Description: Convert to UPPER CASE	Save and Run
Share this template with other users in entity 401	Back
Upper And Lower Case Utility	
Convert selected fields to: UPPER CASE	
Fields To Process: 🗌 Address	
Name	
NameKey	

Figure 24 - When you run the Upper and Lower Case Utility, you can select the fields to convert.

Option	Description
Convert selected fields to:	Indicates which case the fields should be converted to: UPPER CASE, or lower case.
	You can select one or more of the available fields for conversion to the selected case.
Fields to Process: Address Name NameKey	Some options may not be available, depending on the selection made by your district in District Information Configuration options. For example, in Figure 24, the district has selected UPPER CASE as the default. When you run the Upper and Lower Case Utility with this Default Case selection, you cannot convert the Address or Name to lower case. When you pause your mouse pointer over the Fields To Process, a tooltip appears to advise you of this. Additionally, the Name Key field is required to be UPPER CASE.

Table 13 - Options available for the Upper and Lower Case Utility

Using the District Calendar

With the District Calendar module, you can easily display information on the District Public Calendar and share this information with members of your community by linking the District Public Calendar to your district's website.

The District Public Calendar saves you time by grouping all public events in one convenient module. You can add, edit, and delete Calendar Events, Activity Events, Lunch Menus, and Field Trips, all from the District Calendar module.

The District Public Calendar streamlines communication between you and the members of your community. You can post events such as Parent-Teacher Nights, Administration Days, Football Practice, Breakfast and Lunch Menus, and Field Trips, and you can make all of this information available to the members of your community in one easily accessible location.

To learn more about the District Calendar, see the *WSIPC Guide to Configuring* and Maintaining the District Public Calendar and the *WSIPC Guide to Viewing* the District Public Calendar.

Appendix A - Event Types and Event Triggers

When you configure an Auto Email, you can select from many available Event Types and Event Triggers. The following list contains all Event Types and Event Triggers currently available.

- Attendance Letters (Triggers only available when signed in to a specific Entity)
 - Period Attendance Letter Generated for Full Year
 - Period Attendance Letter Generated for Semester
 - Period Attendance Letter Generated for Term
 - Period Attendance Letter Generated for Date Range
 - Total Attendance Letter Generated for Full Year
 - Total Attendance Letter Generated for Semester
 - Total Attendance Letter Generated for Term
 - Total Attendance Letter Generated for Date Range
 - Class Attendance Letter Generated for Full Year
 - Class Attendance Letter Generated for Semester
 - Class Attendance Letter Generated for Term
 - Class Attendance Letter Generated for Date Range

Note	The Event Triggers shown for Attendance Letters are
	governed by the Attendance Letter Types (Student
	Management\OF\AT Setup\CF\AL) that have been
	configured for use. To learn more about Attendance
	Letters, see the WSIPC Guide to Attendance.

- Current Year Master Schedule Changes
 - Add, Remove, Activate or Inactivate a section
 - Change to Meet Pattern
 - Change to Teacher or Teacher Type
 - Change to Display Period, Scheduling Period or Attendance Period

- Current Year Schedule Changes
 - Class is Added
 - Class is Dropped
 - Term Adjustment
 - Course Request Added in Family/Student Access
 - Course Request Dropped in Family/Student Access
- Demographic Changes
 - Address Change
 - Primary Phone Number Change
- Discipline Actions
 - Any Action Issued
 - Any Suspension Type Issued
 - In School Suspension
 - Out of School Suspension
 - Expulsion
 - Parental Conference
 - IAES
- Discipline Offenses
 - Any Offense Issued
 - Drug Related Offense Issued
 - Injury Related Offense Issued
 - Weapon Related Offense Issued
- Discipline Referrals
 - Any Referral Issued
- District to District Notifications
 - Student File Received
 - Student Requested by Other District
 - Student Request Was Declined
 - Student Request Was Accepted
 - Student Enrolled At New District
 - Student Exported
 - Request Declined Locally
 - Student Request was put on Hold
 - Request put on Hold Locally
 - Subscription Status Change

- Student Imported Successfully
- Student Enrolled Successfully
- Student Request Approved Locally
- Student Request Approved Locally

Note	The Event Triggers for District-to-District are only
	available if your district has configured the District-to-
	District Transfer module (Student
	Management\Students\DD). To learn more about the
	District-to-District Transfer module, see the WSIPC Guide
	to District-to-District Student Transfer.

Enrollment Changes

- Student Entered
- Student Reentered within District
- Student Entered for First Time
- Student Entered from Outside District
- Student Withdrew
- Student Withdrew In District
- Student Withdrew Out of District
- Status Change
- Student Entered and Spec Ed Records Exist
- Student Withdrew and Spec Ed Records Exist
- Family Access Notifications
 - Absence Notification Request
 - Any Attendance Entered for Today
 - Daily Progress Report
 - Weekly Grading Notification
- Food Service
 - Student Added to Free/Reduced Family
 - Student Reentered within District (Food Service)
- Future Schedule Changes
 - Course Request Added in Family/Student Access
 - Course Request Dropped in Family/Student Access
- GPA Calculations
 - Errors Found

- Office Visit
 - Student Entry
- Pseudo Student Management
 - Pseudo Request Submitted
 - Pseudo Request Approved
 - Pseudo Request Denied
- Special Education
 - The following Event Triggers for Special Education are those most commonly used by Washington State districts:
 - Student is Added to Special Education
 - Student was Exited from Special Education
 - New Evaluation is Created
 - New IEP is Created
 - The following Event Triggers for Special Education can be configured in districts that use the WIP (Work in Progress), Lock, and Approval features in Special Education:
 - Evaluation is Locked
 - IEP is Locked
 - Evaluation is set as WIP
 - IEP is set as WIP
 - Evaluation is Set to Waiting for Approval
 - IEP is set to Waiting for Approval
 - Evaluation is Approved
 - IEP is Approved
 - The following Event Triggers for Special Education pertain to the use of Special Education Forms which are not used by Washington State districts:
 - Eval Form is set to Waiting for Approval
 - IEP Form is set to Waiting for Approval
 - Eval Form is set to Approved
 - IEP Form is set to Approved
 - Special Education Meeting is Created
 - Special Education Meeting Time/Date Changed
 - Special Education Meeting Deleted