WSIPC Guide to Advanced Features

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Contents

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	24
Added "Using Processing Lists" section	29
Added "Using Message Center" section	30
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Added Using Transcript Signature" section	32
Added "Accessing the Name Maintenance Screen" section	58
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Added "Using the District Calendar" section	79

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).

Note	Some 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.

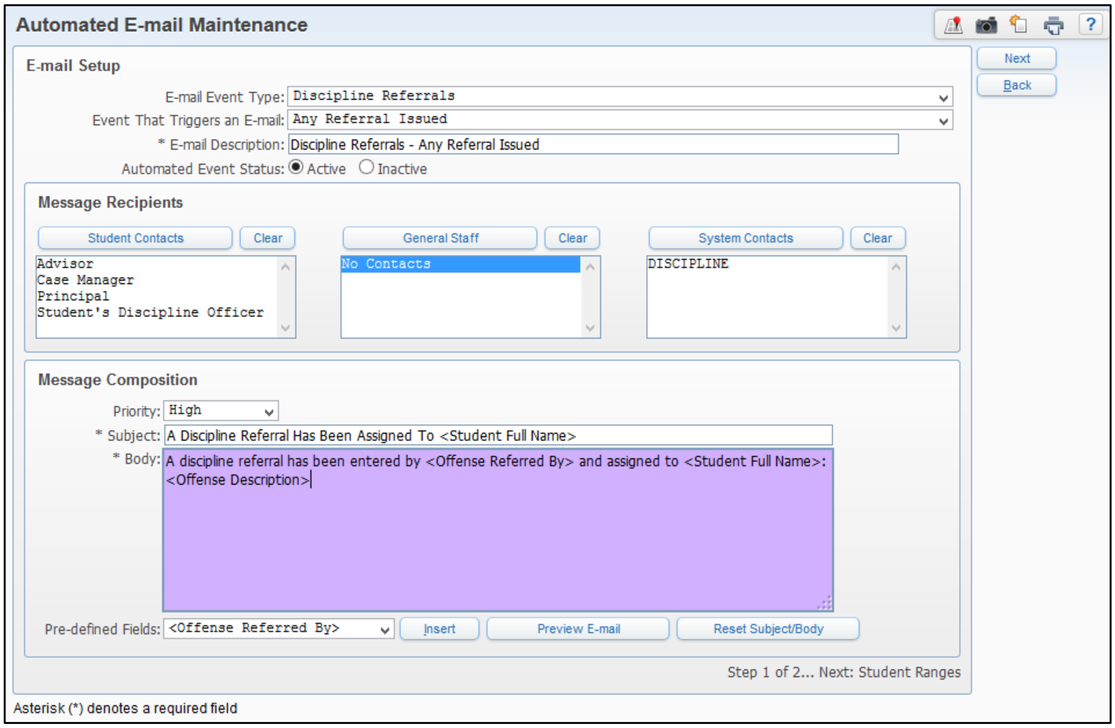

Figure 1 - Automated E-Mail Maintenance screen when creating an Auto Email from Entity 000

AREA	PURPOSE OF AREA
E-Mail Setup	Contains basic information about the Auto Email.
Options in This Area	**Description of Options**
E-Mail Event Type	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). You cannot change the Event Type once the Auto Email is created. For a complete listing of all Event Types and Event Triggers, see "Appendix A - Event Types and Event Triggers" (page 80).

Options in This Area	Description of Options
Event That Triggers an E-Mail	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). 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 "Appendix A - Event Types and Event Triggers" (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 day the email is triggered).

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 "Managing System Contacts" (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

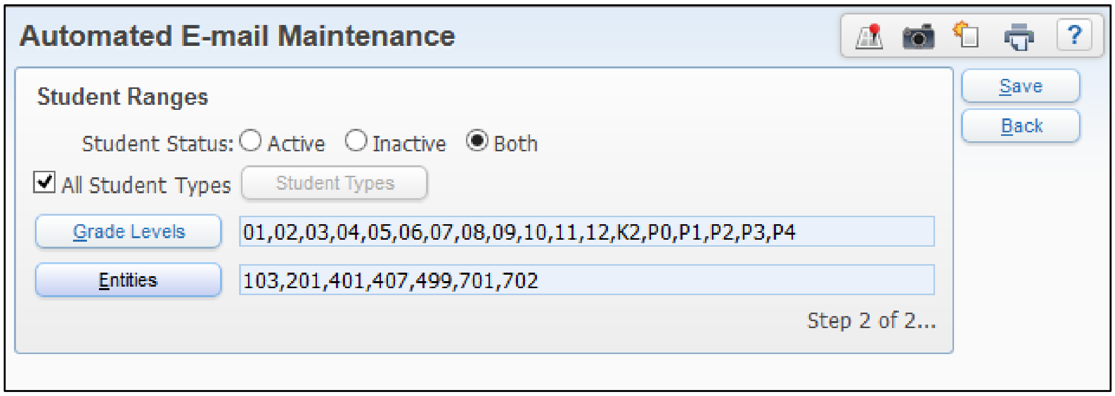

Figure 2 - Selecting Student Ranges when creating an Auto Email from Entity OOO

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 *WSIPC Guide to Student Demographics and Families*.
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).

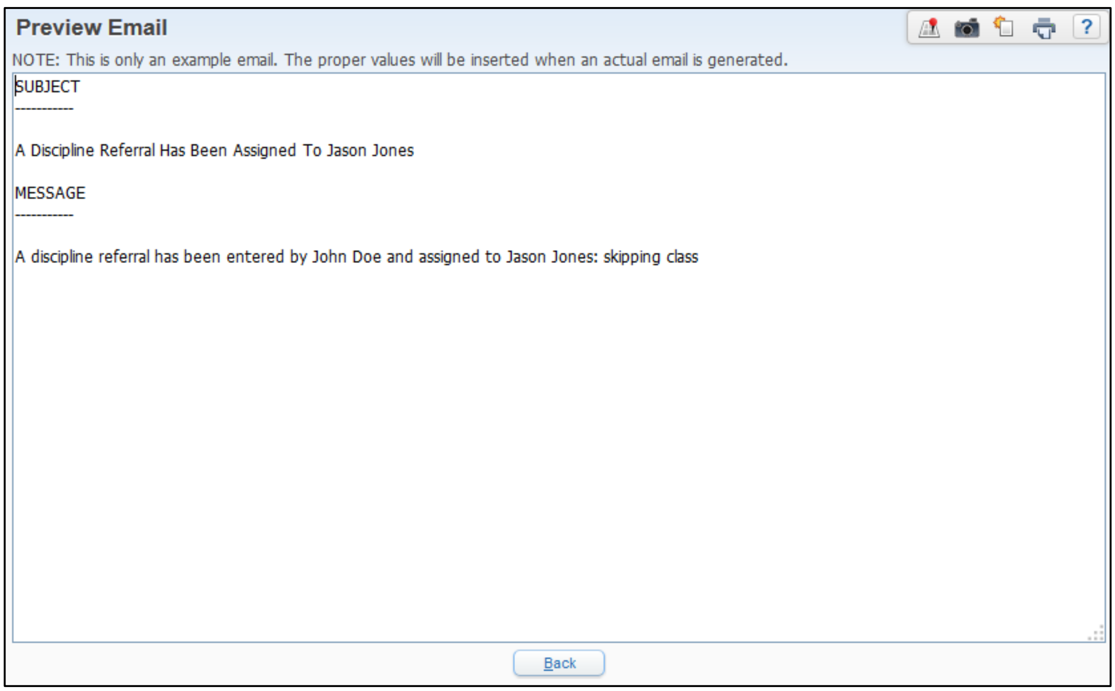

Figure 3 - Preview Email screen showing an example of how Auto Emails will appear to the recipients

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.

Tip	Changing 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.
3. 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 "Using Automated Emails" (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.

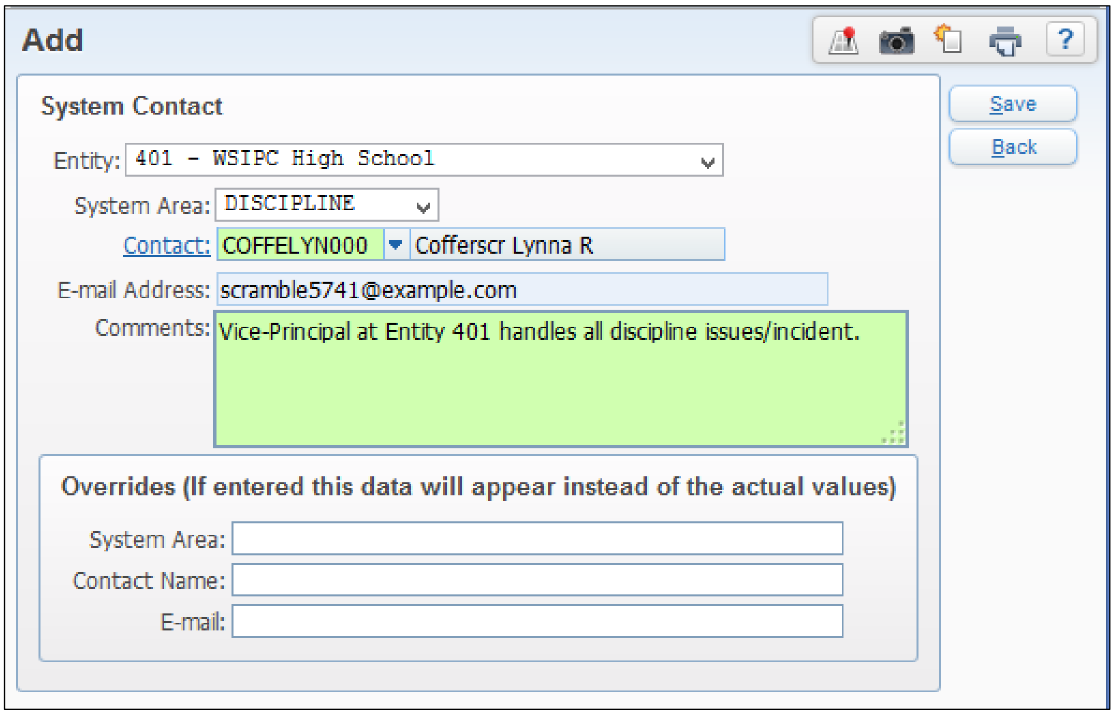

Figure 4 - System Contact Add screen

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
System Area	The area of the system to which the System Contact applies: ▪ 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\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.

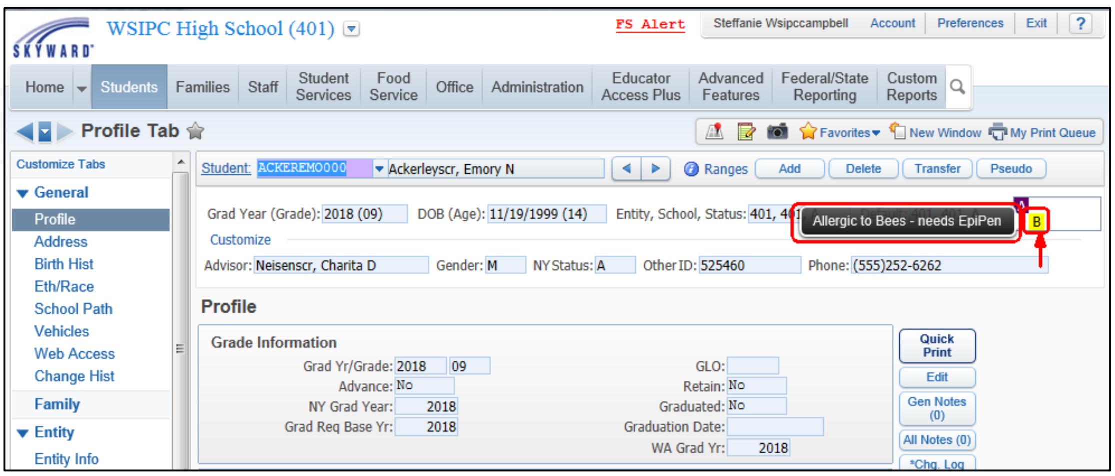

Figure 5 - This student has a Student Indicator of a yellow "B" to denote that he is allergic to bees.

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.

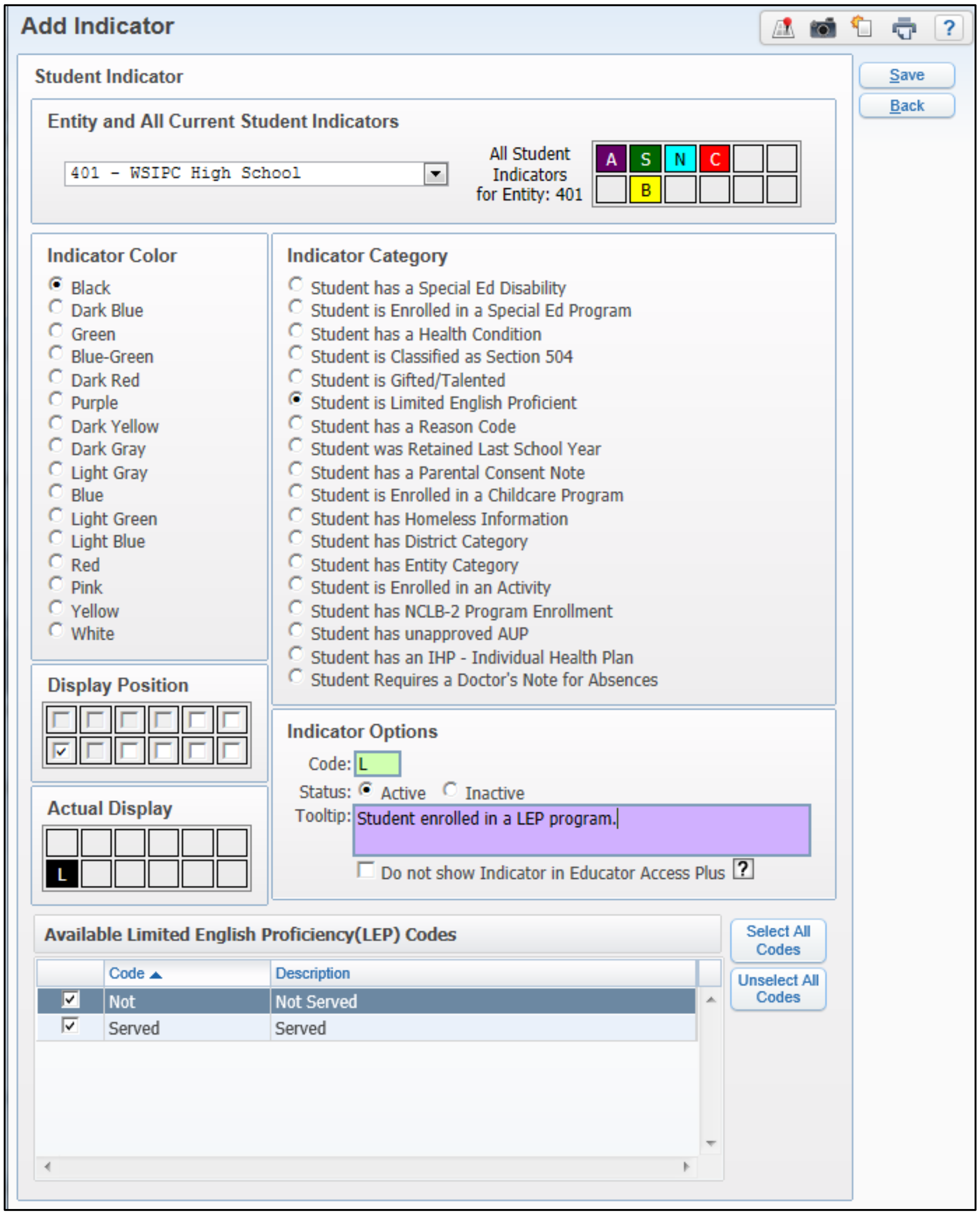

Figure 6 - Add Indicator screen

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
Display Indicator details for all users	Gives users access to view the details of the Student Indicator record. If this option is not selected, users only see the Indicator Category. 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
Check all entities	Checks all Entities to see if student was Retained last school year. This option is available only when the following Indicator Category is selected: ▪ Student was Retained Last School Year
Show Indicator even if IEP is expired	Attaches Student Indicator to a student's record even if the IEP (Individualized Education Plan) has expired. To learn more about IEPs, see the *WSIPC Guide to Special Education*. 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
Show Indicator if student has exited Special Ed	Displays the Student Indicator on a student's record even after they have exited from Special Education. 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
Show Indicator even if enrollment is not current	Displays the Student Indicator on a student's record even if the student's enrollment in the program 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 Student Indicators to display only for a subset of students in a Category. For a list of Indicator Categories with Available Codes and to learn more about selecting Available Codes, see "Understanding Available Codes Selection" 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.

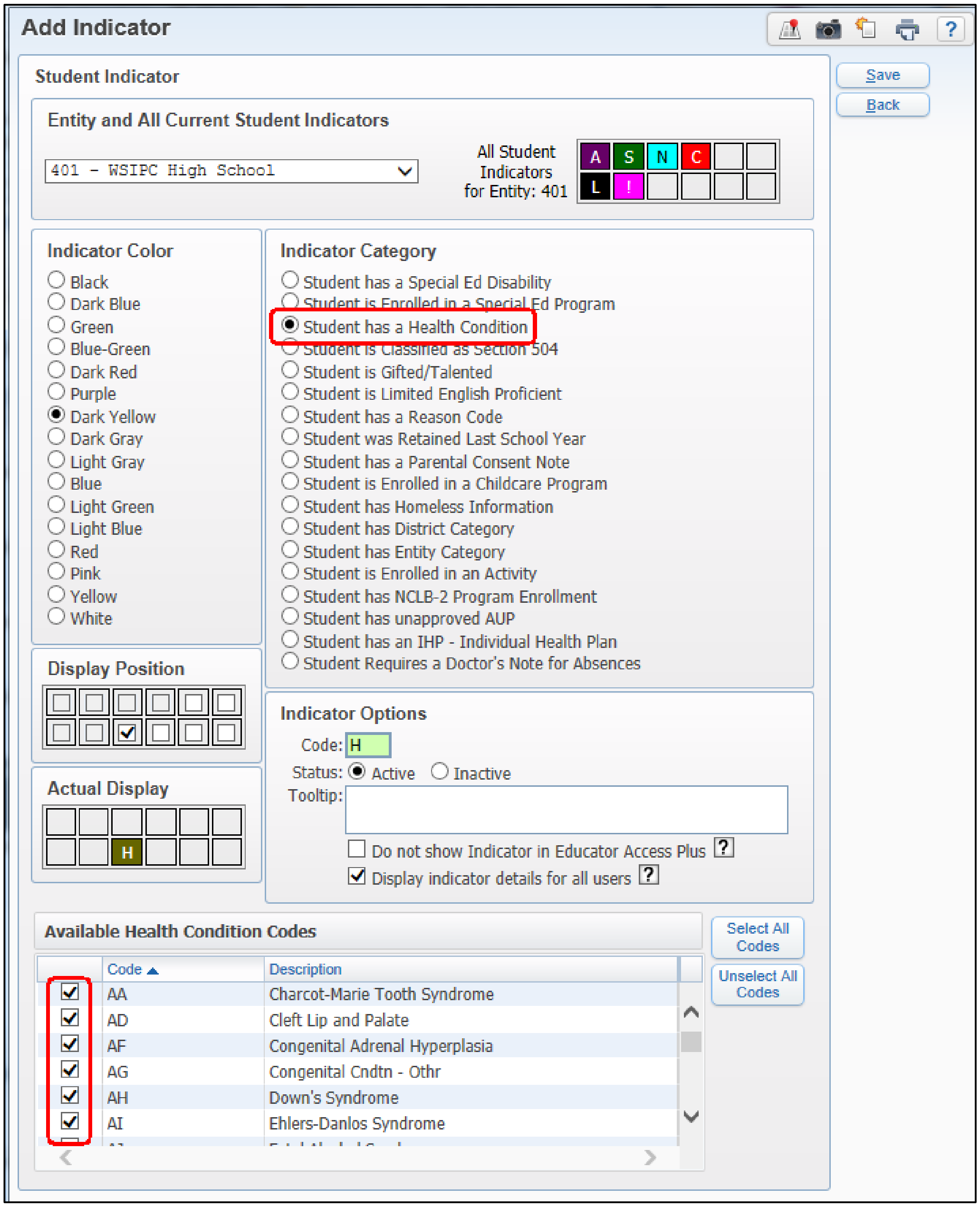

Figure 7 - Health Condition Student Indicator where all Health Conditions are selected

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.

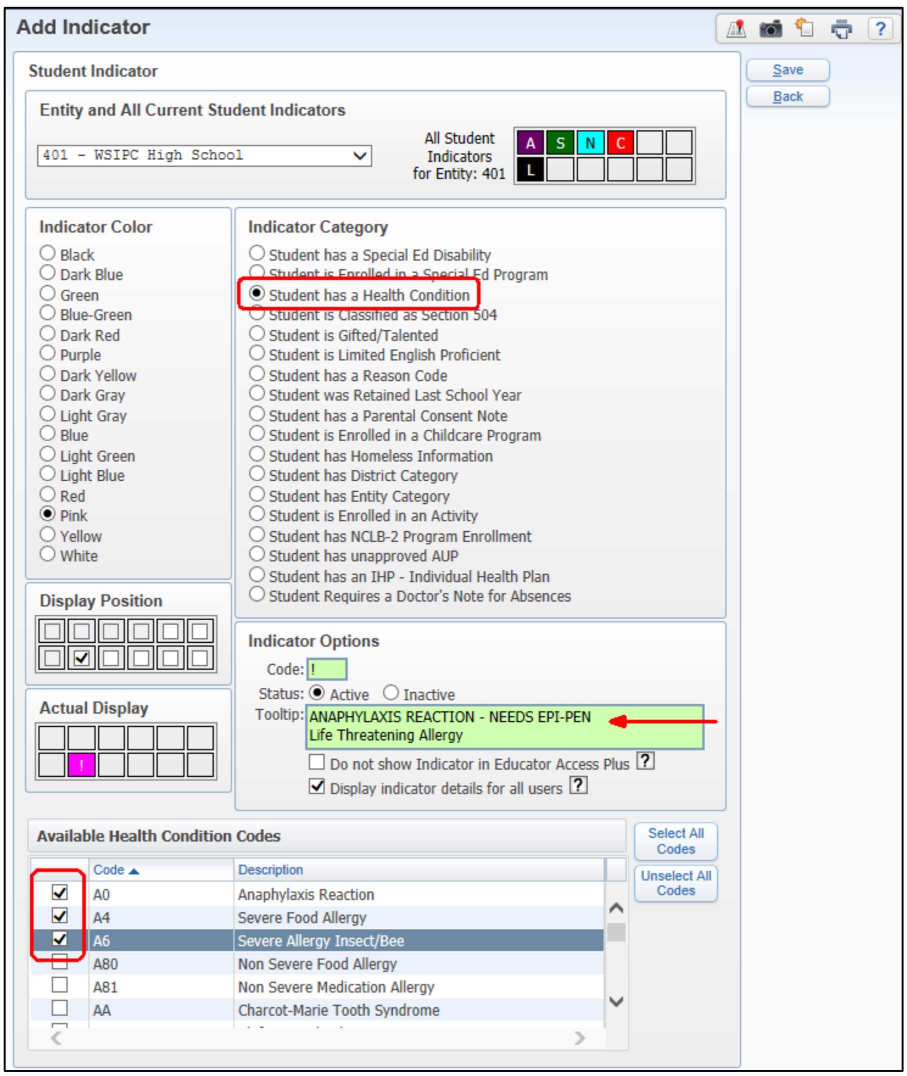

Figure 8 - Health Condition Student Indicator where specific Health Conditions are selected

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.

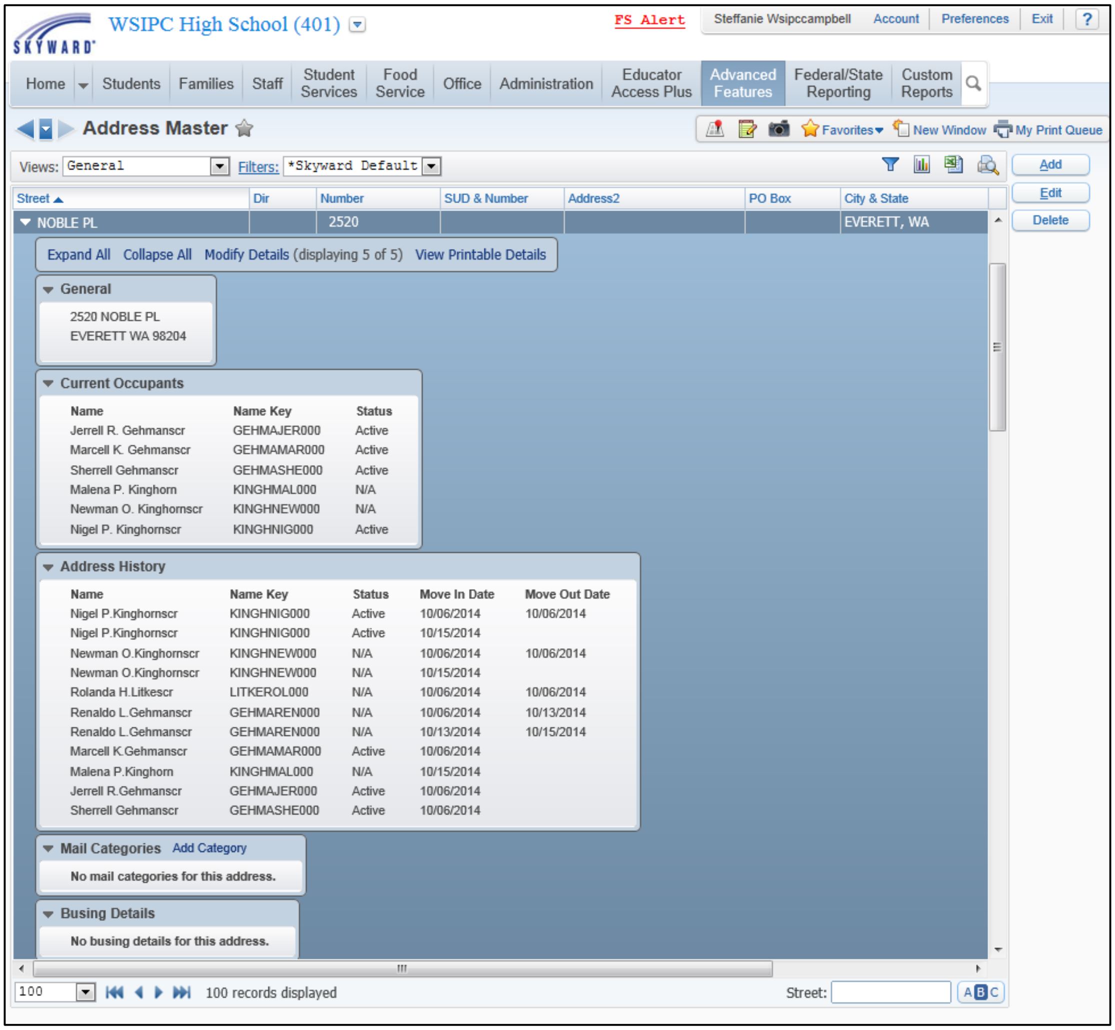

Figure 9 - You can expand a record in the Address Master to view additional information

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.

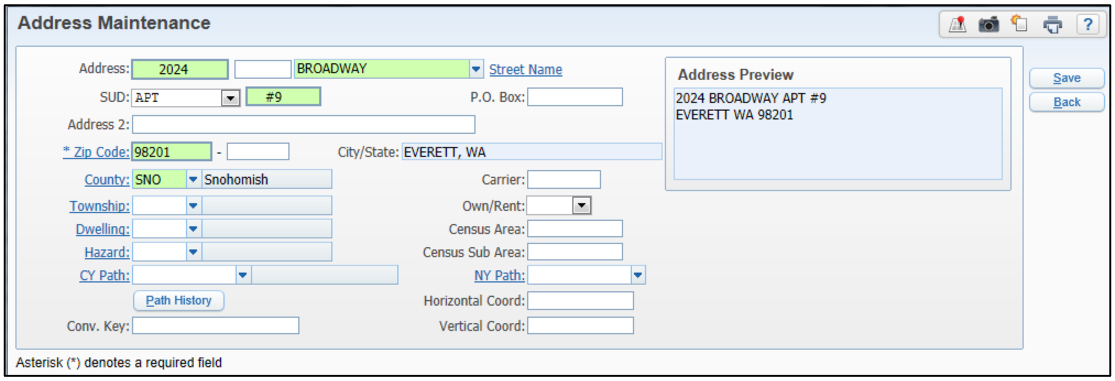

Figure 10 - You can add and update address information using the Address Maintenance screen.

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 "Configuring Codes in the Address Module" (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 "Configuring Codes in the Address Module" (page 40).
Carrier	Mail carrier number, if used.
Township	Township code, if used. To learn more about Township Codes, see "Configuring Codes in the Address Module" (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 "Configuring Codes in the Address Module" (page 40).
Census Area	Census tracking information.
Hazard	Hazard Code, if used. To learn more about Hazard Codes, see "Configuring Codes in the Address Module" (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 ***not*** 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.

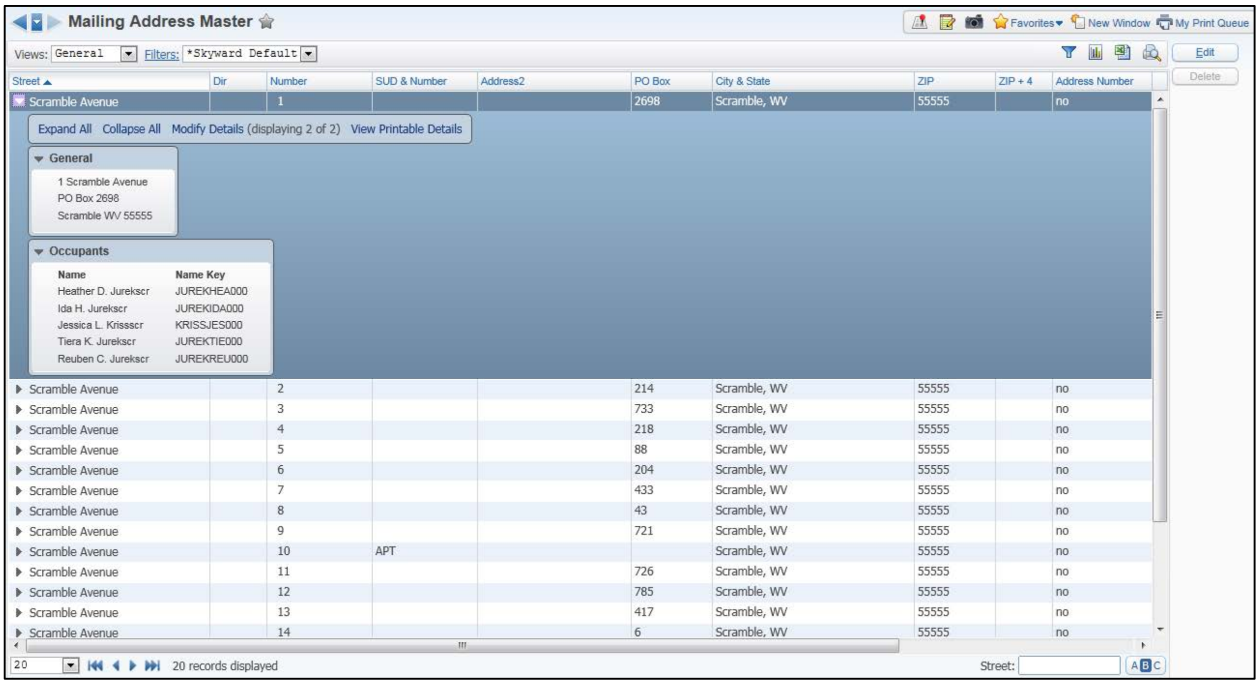

Figure 11 - You can expand a record in the Mailing Address Master to view additional information.

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 "Using the Address Master" (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
ZIP Codes	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. **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 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.

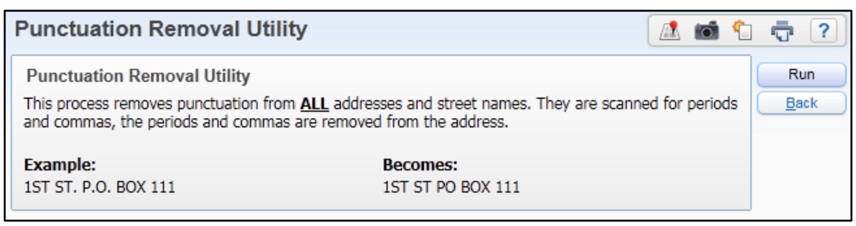

Figure 12 - The Punctuation Removal Utility does not require you to set any parameters.

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.

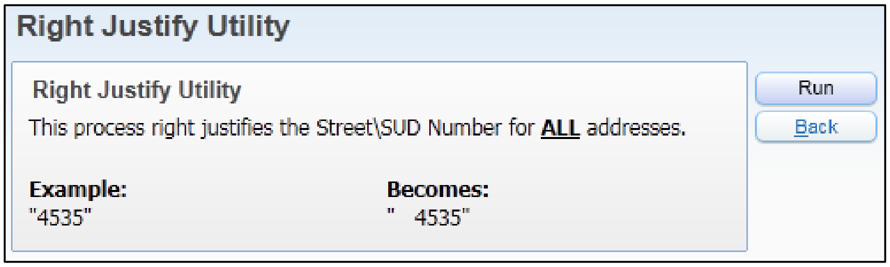

Figure 13 - The Right Justify Utility does not require you to set any parameters.

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.

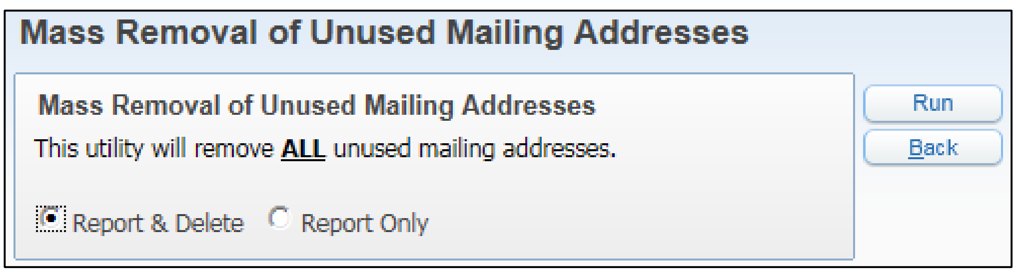

Figure 14 - You can run the Mass Removal of Unused Mailing Addresses Utility in Report & Delete or Report Only mode.

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.

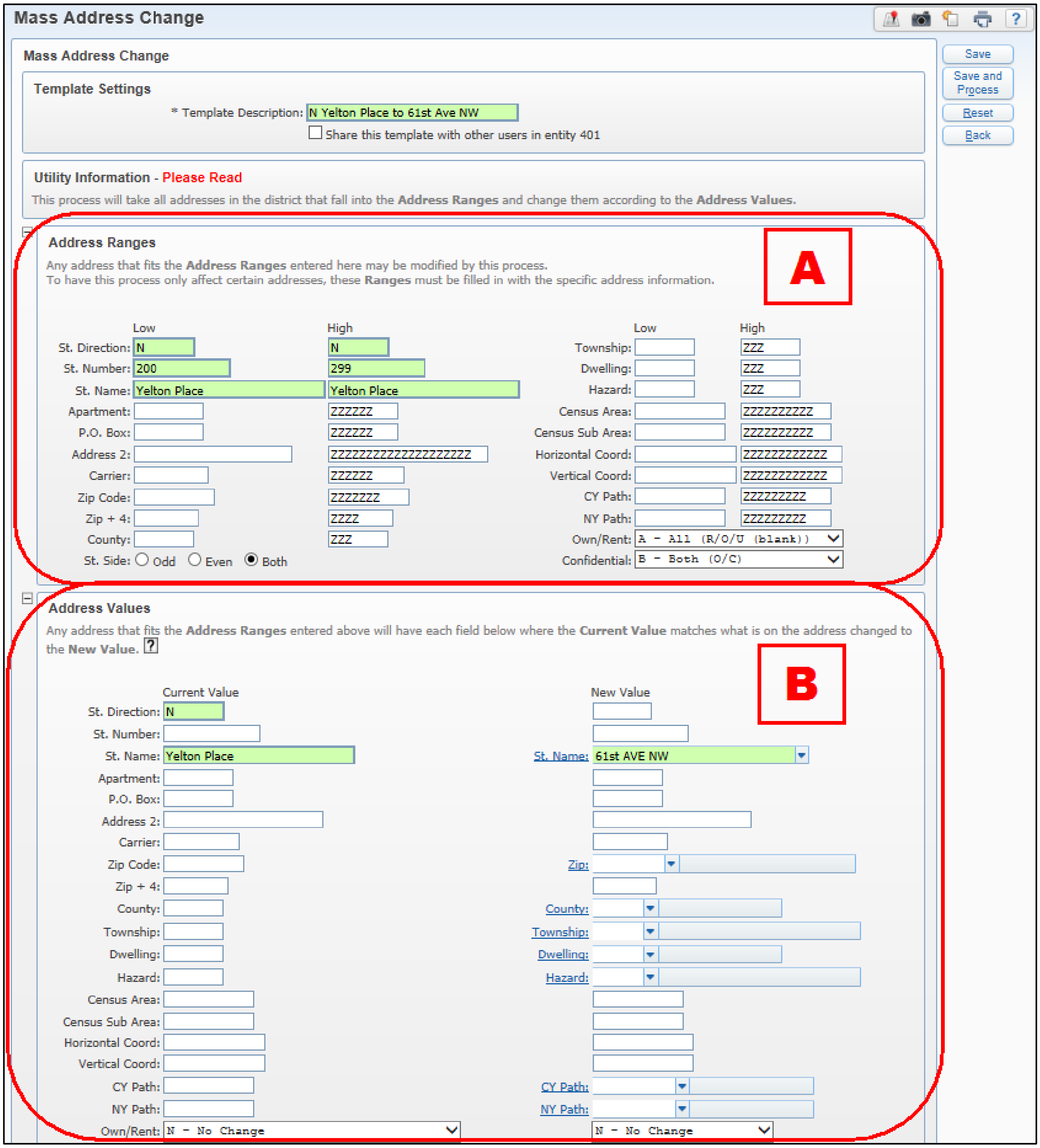

Figure 15 - Mass Address Change screen with example scenario entered in template

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 (primary ZIP only)	Merges numeric and alphanumeric ZIP codes when the City, State, and numeric portion of the ZIP are identical. 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.
Remove PO Box from Street Name	Moves PO Box information out of the Street Name box and into the P.O. Box box. 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
Remove Street Number from Street Name	Moves street number information out of the Street box and into the Number box. 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.
Remove Apartment from Street Name	Moves apartment information out of the Street box and into the Apartment box. 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 Street Name	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. 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. **Caution**: This option is intended to assist districts that recently converted and whose addresses weren't converted correctly. Running this utility for any other reason could corrupt your data.
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.

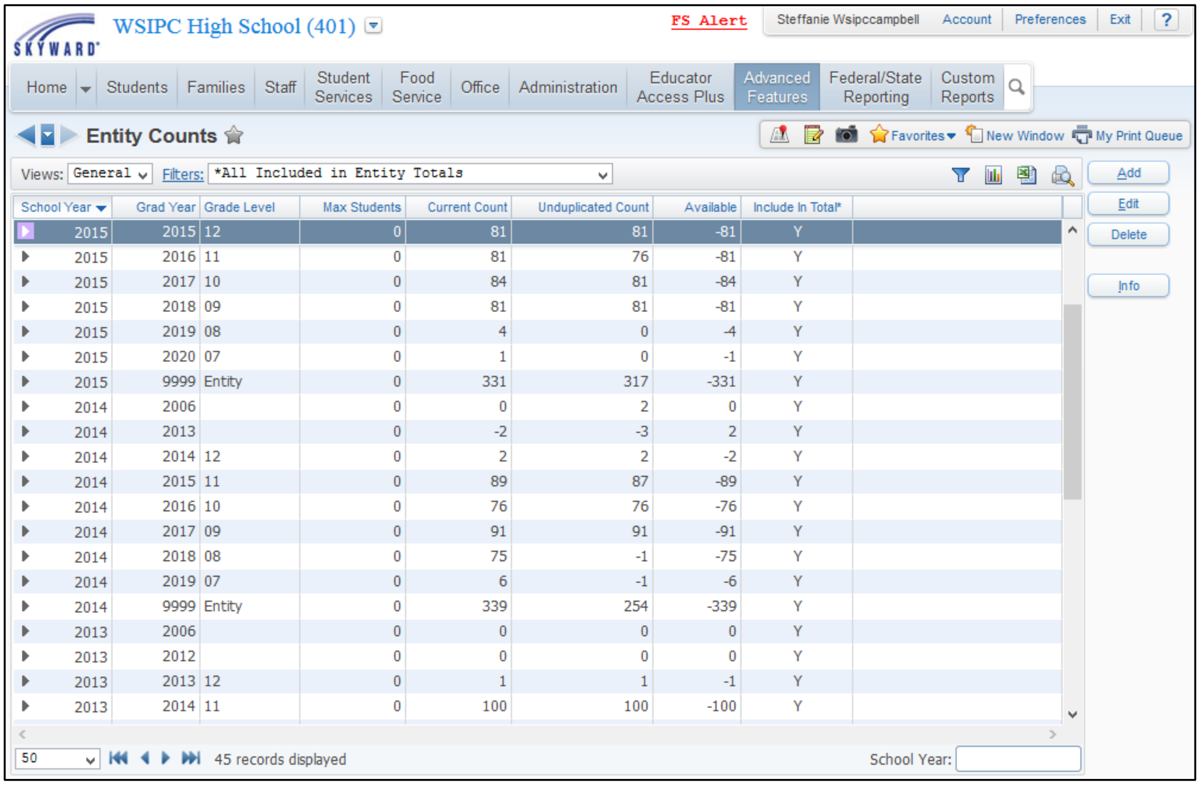

Figure 16 - The Entity Counts screen counts students for each Grad Year and can also show the number of seats remaining for each Grad Year when Max Students is configured.

Note	When 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
Max Students	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. 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 "Clone Max Counts" (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.

Best Practice	Do not add or delete Individual Grad Year records, as those features were 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.

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

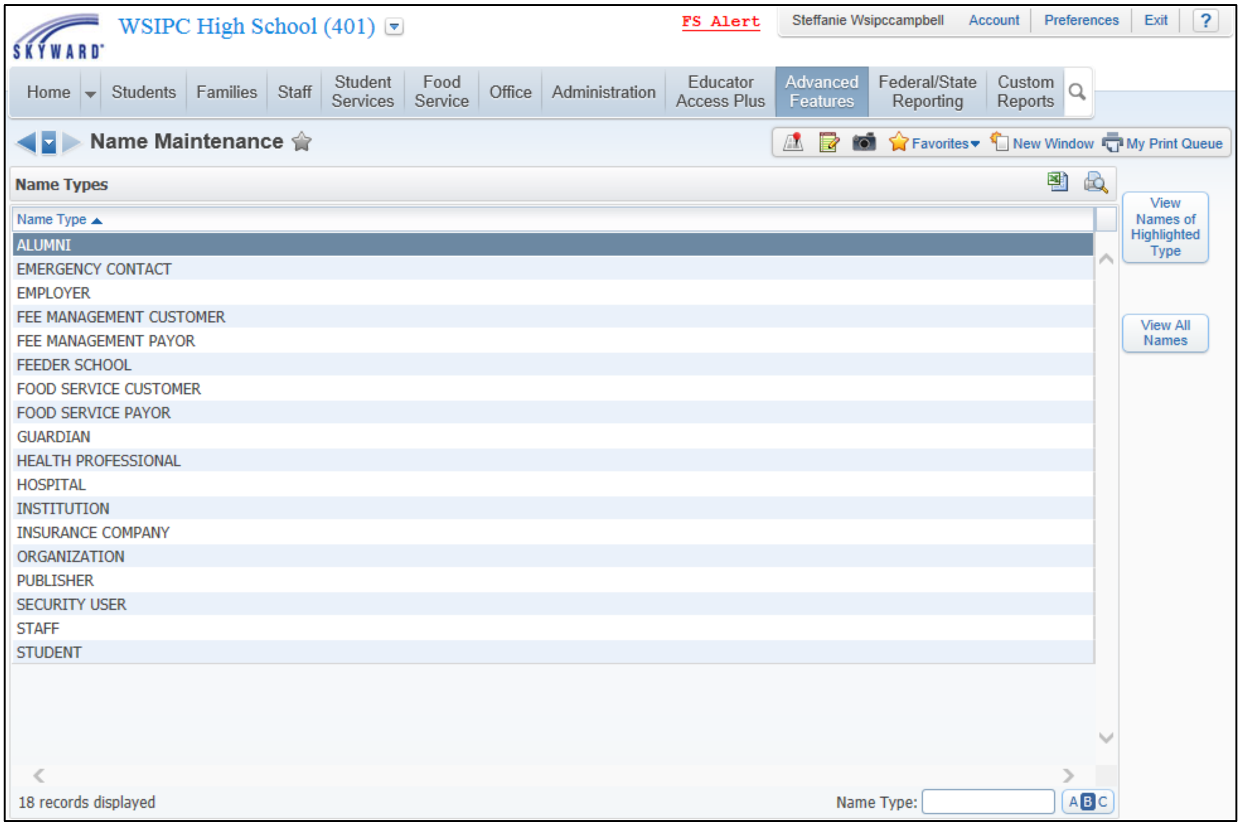

Figure 17 - Before you view specific Name records, you select which Name Type(s) you want to work with

Name Type	Description	Format
Alumni	An *optional* 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 *WSIPC Guide to Fee Management.*	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 *WSIPC Guide to Fee Management.*	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 *WSIPC Guide to Food Service Administration and Management*.	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 *WSIPC Guide to Food Service Administration and Management*.	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 *WSIPC Guide to Student Demographics and Families*.	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 *WSIPC Guide to Student Demographics and Families*.	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 *WSIPC Guide to Health Records.*	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 *WSIPC Guide to Student Demographics and Families*.	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 *WSIPC Guide to Textbook*. You must manually add the Provider Name Type to a Name record through Name Maintenance.	Business
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 *WSIPC Guide to Student Demographics and Families*.	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 *WSIPC Guide to Security.*	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.

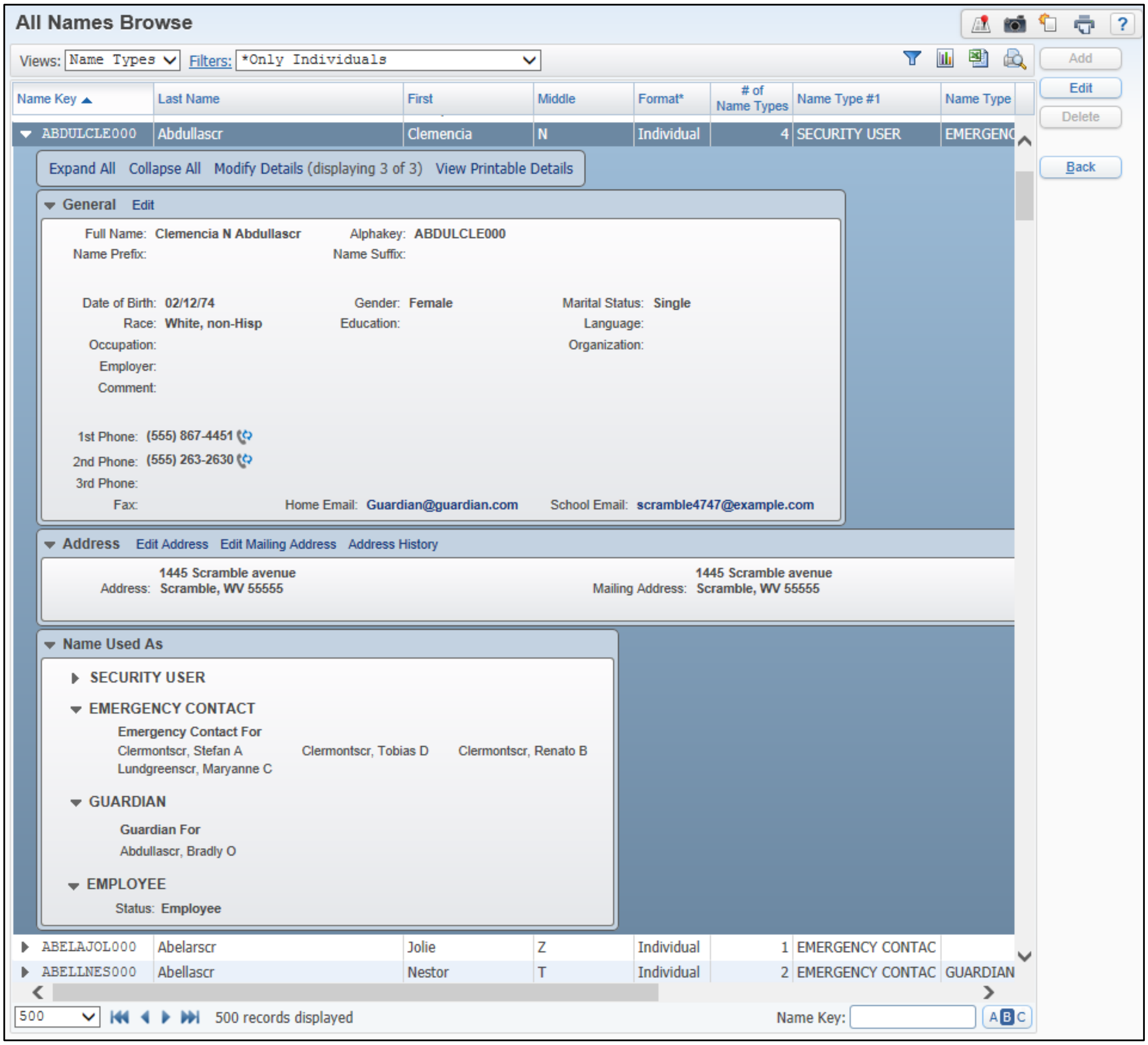

Figure 18 - A Name record in the All Names Browse that has four Name Types attached to it: Security User, Emergency Contact, Guardian, and Employee.

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 "Editing a Name Record" (page 65). To learn more about the codes used in Name Maintenance, see "Configuring Name Maintenance Codes" (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 "Editing Addresses and Mailing Addresses" (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.

7. Configure the Name Information screen (Figure 19). To learn more about some of the options on this screen, see Table 11 in "Configuring Name Maintenance Codes" (page 71).

8. Click Save.

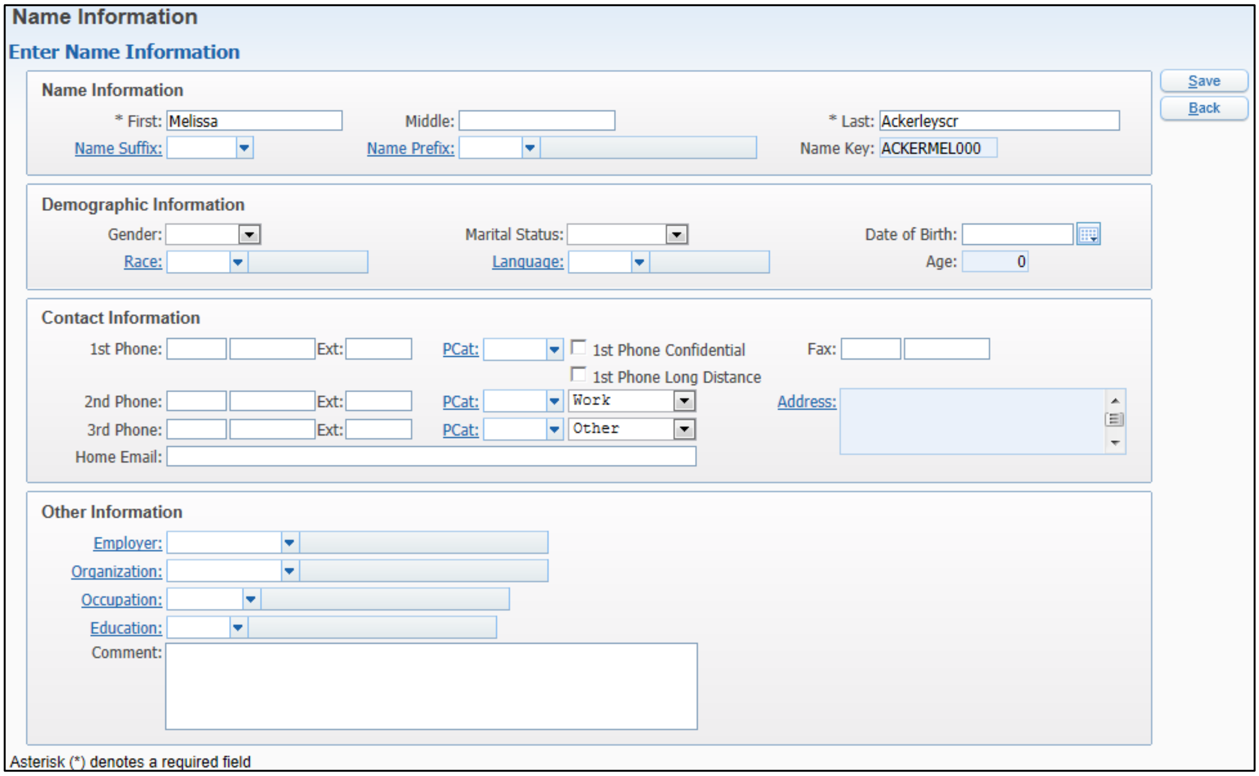

Figure 19 - Example of the Name Information screen when adding a Name record for an Individual

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.

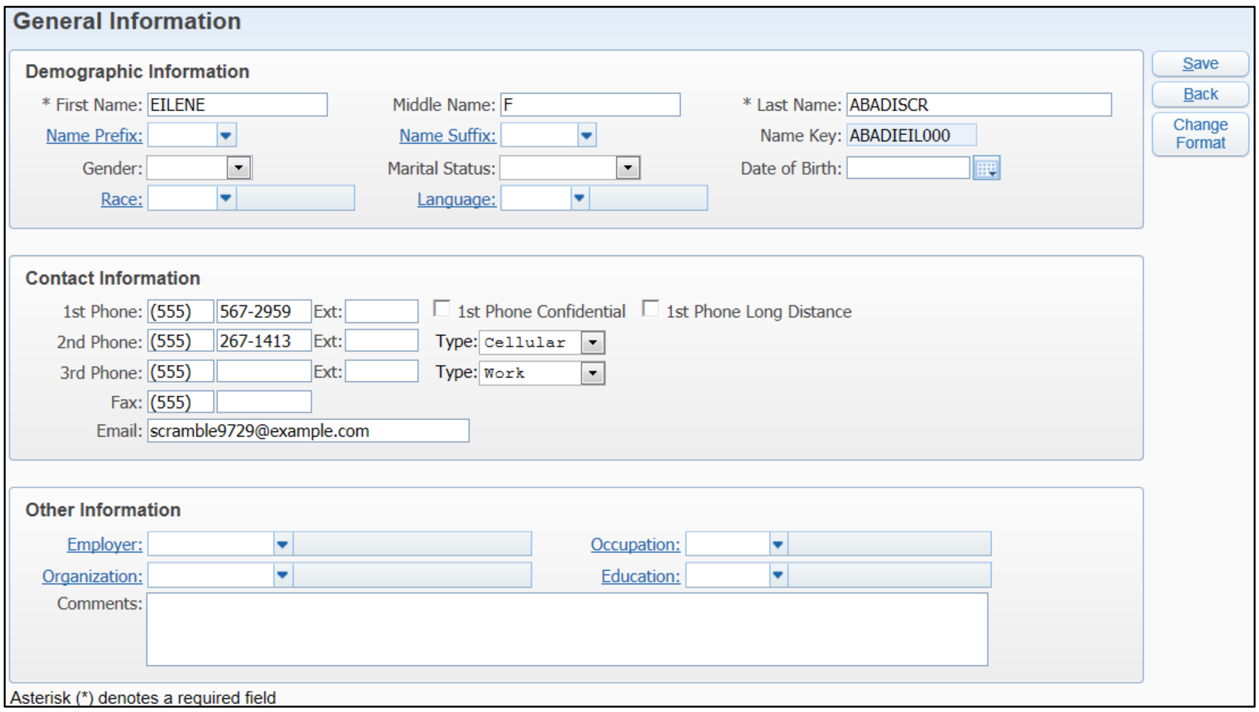

Figure 20 - The General Information screen for a Name record belonging to an individual (in this case, an Emergency Contact).

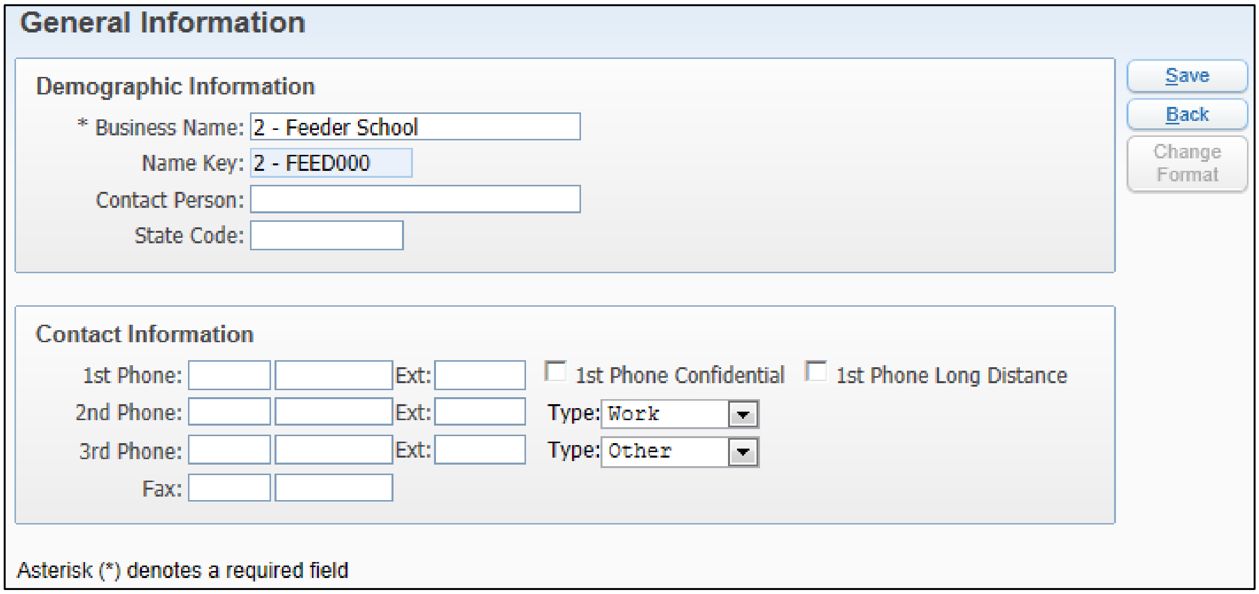

Figure 21 - The General Information screen for a Name record belonging to a business (in this case, a Feeder School).

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.

Note	Additional 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 Practice	Edit addresses and mailing addresses from the area in which the 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:

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

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 *WSIPC Guide to Student Demographics and Families*.
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.

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 Maintenance Screen" (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 *WSIPC Guide to Student Demographics and Families*.

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 "Accessing the Name Maintenance Screen" (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 "Accessing the Name Maintenance Screen" (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.

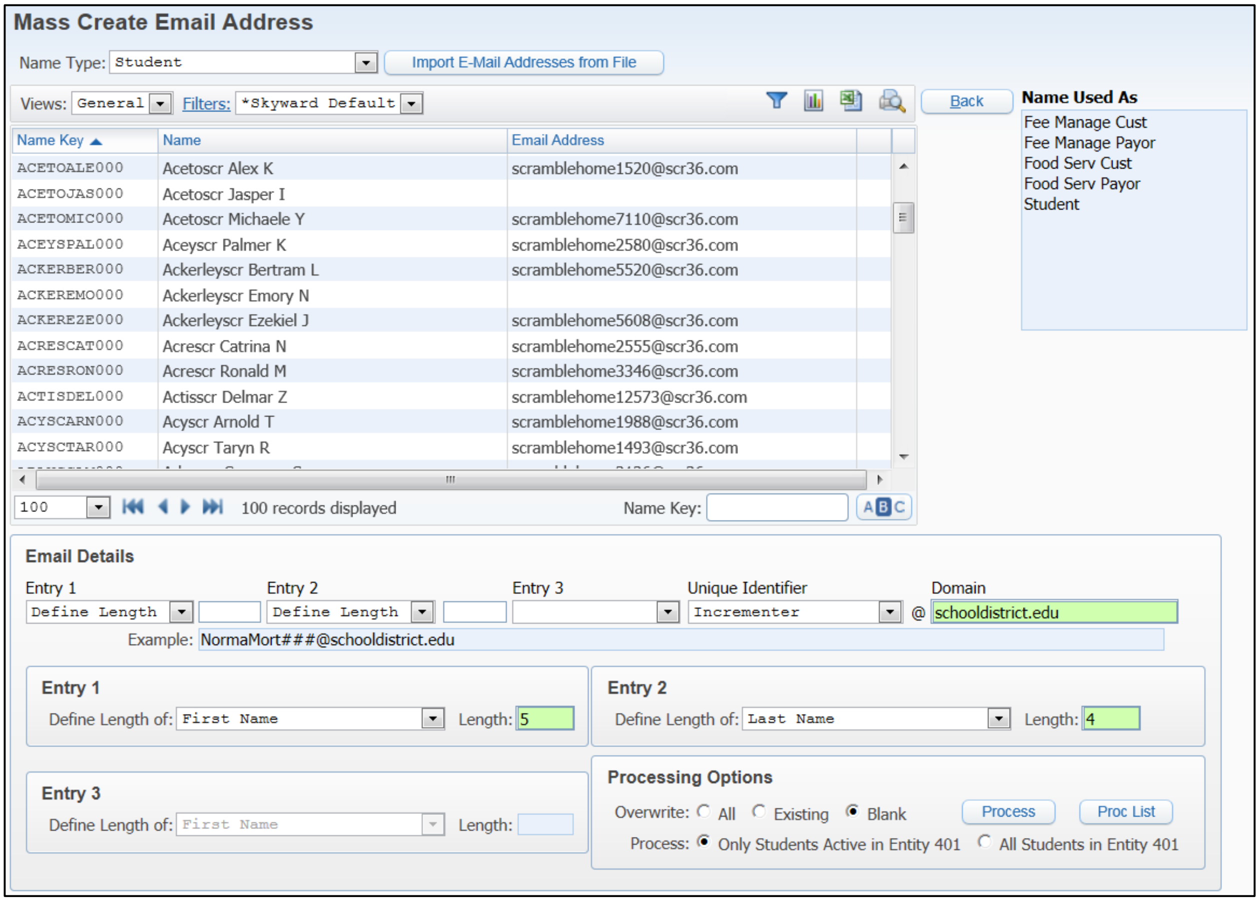

Figure 22 - When you use the Mass Create Email Addresses Utility, you specify the criteria used to generate email addresses.

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.

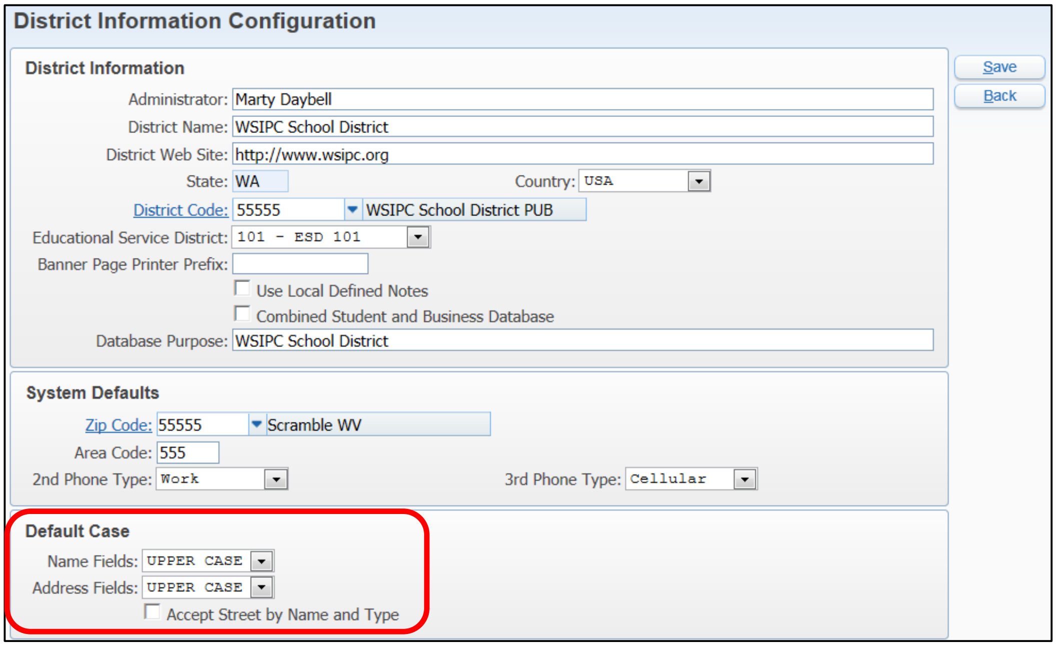

Figure 23 - You can set the default case for text entered into Name and Address boxes throughout the system in District Information Configuration.

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.

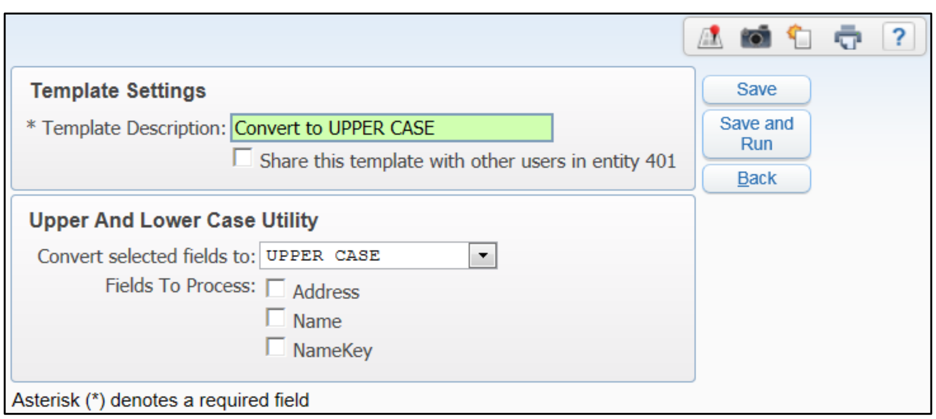

Figure 24 - When you run the Upper and Lower Case Utility, you can select the fields to convert.

Option	Description
Convert selected fields to:	Indicates which case the fields should be converted to: UPPER CASE, or lower case.
Fields to Process: Address Name NameKey	You can select one or more of the available fields for conversion to the selected case. 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