AERIESCON
Spring 2024

Session 362
Flex Attendance Setup Daily

Presenter
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About this Session

- Session 362 documentation and Power Point:
  - https://support.aeries.com/support/solutions/articles/14000139245-session-362-flex-attendance-for-daily-attendance-schools
- Spring 2024 AeriesCon Sessions and documentation:
  - https://support.aeries.com/support/solutions/folders/14000117997

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Expected Outcomes

- Be familiar with the School Options setup in a Primary Class Tracking School – (Flex – Daily)
- Know the supported attendance setups for Flex schools
- Be familiar with the Security Tables needed for Flex Attendance
- Be familiar with Primary Class Tracking as it pertains to Flex Attendance
- Be familiar with Primary and Secondary ADA times
- Learn how to set up Flex Periods and Class Calendars
- Learn where to find Flex Reports and Flex Queries in the KBA
- Learn about the Table and Field Conversions for Flex
- Be familiar with Related Tables

Flex Attendance – Security and Tables

Table	Permission	Description
Flex Scheduling Feature Flag	Admin	**Flex Scheduling** must be enabled **Use Staff ID Based Counselor Tracking** must be enabled
OPT	Admin User: Read, Update	A User must have **Read** and **Update** permission to update either **Track Primary Classes for Students** option or **Use Staff ID Based Counselor Tracking** option.

Table	Field	Description
School Options (OPT)	NM	TrackPrimaryClasses = true
School Options (OPT)	NM	UseStaffIDBasedCounselorTracking = true

Attendance Tables	Permission	Description
Flex Periods (FTF)*	Read Insert Update Delete	View page Add new record Update records Delete Records *Full permissions are necessary to setup **Flex Periods** See Flex Period for more info.
Flex Period Times (FTT)*	N/A	Security is mirrored using **FTF** and will not be listed on the **Security** page)
Bell Schedule Definitions (BSD)	Read Insert Update Delete	View page Add new record Update records Delete Records Used in conjunction with Flex Period Times (FTT) See Bell Scheduler for more info.
Class Calendars (CCL)*	Read Insert Update Delete	View page Add new record Update records Delete Records *Full permissions are necessary to setup **Class Calendars** See Class Calendar for more info.

Attendance Tables	Permission	Description
Class Calendar Dates (CCD)*	N/A	Security is mirrored using **CCL** and will not be listed on the **Security** page)
Calendar (DAY)	Read Insert Update Delete	View page Add new record Update records Delete Records See Calendar for details.
Class Attendance (CAT)* (Student Attendance)	Read Insert Update Delete	View page Add new record Update records Delete Records See Student Attendance for more info.
Attendance Notes (ATN)	Read Insert Update Delete	View page Add new record Update records Delete Records
Course Attendance (CAR)	Read Insert Update Delete	View page Add new record Update records Delete Records

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Flex Attendance – Security and Tables

Flex Scheduling Feature Flag	Admin	Flex Scheduling must be enabled Use Staff ID Based Counselor Tracking must be enabled
OPT	Admin User: Read, Update	A User must have Read and Update permission to update either Track Primary Classes for Students option or Use Staff ID Based Counselor Tracking option.

Table	Permission	Description
Attendance Data (ATT)	Read Insert Update Delete Mass Update	View page Add new record Update records Delete Records To over-ride a locked month on the Mass Change Attendance page
Attendance Log (ATL)	Read Insert Update Delete	View page Add new record Update records Delete Records
Attendance Submission Log (CAS)	Read	View the Attendance Submission Log page Run the Missing Attendance report
Attendance Notes (ATN)	Read Insert Update Delete	View Attendance Notes Add Attendance Notes Update Attendance Notes and Update on the Mass Change Period Absences form. Delete Attendance Notes

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Supported Flex Attendance Setups

ATT Setup	Sched Type	ATT Type	ATT Rptg	Additional Information
Elementary Middle School K-8 School	Flexible	Daily	Neg	• Attendance is taken **once a day** • **All Day** code determines ADA • Attendance Time is the defined **All Day Attendance Management** in School Options • **Primary ADA Time is** defined • **Use Staff in Sections** in School Options • **Track Primary Classes for Students** • **Flex Periods** • **Class Calendars** • **Custom Bell Schedule** • **Standards Based Grades** and/or **Grade** Report Cards • Attendance Documentation • Flex Scheduling Documentation
Elementary Middle School K-8 School	Flexible	Period	Neg	• Attendance is taken **each period** • Staggered start times used to accommodate Attendance (AM/PM Kindergarten) • **All Day** code determines ADA • Attendance Time is the defined **All Day Attendance Management** in School Options • **Populate All-Day Attendance Code Automatically** in **School Settings** • **Use Staff in Sections** in School Options • **Track Primary Classes for Students** • **Flex Periods** • **Class Calendars** • **Custom Bell Schedule** • **Standards Based Grades** and/or **Grade** Report Cards • Attendance Documentation • Flex Scheduling Documentation

**When deciding how to set up your Flex School, please consider what reports your school is used to for Attendance Accounting

- Flexible – Daily – Negative

May be used for Elementary, Middle Schools, and K-8 schools

- Flexible – Period – Negative

May be used for Elementary, Middle School, K-8, and Secondary schools

- Flexible – Period – Positive

May be used for Continuation School

ATT Setup	Sched Type	ATT Type	ATT Rptg	Additional Information
Secondary	Flexible	Period	Neg	• Attendance is taken **each period** • **All Day** code determines ADA • **All Day Att Time Mgmt** • **Use Staff in Sections** in School Options • **Flex Periods** • **Class Calendars** • **Custom Bell Schedule** • **Grade** or Secondary Standards Based **Grades** Report Cards • Attendance Documentation • Flex Scheduling Documentation
Continuation School	Flexible	Period	Pos	• Attendance is taken **each period** • Students must be marked as **Present** or **Absent** (no blanks should be left in attendance) • Students must be enrolled for a minimum of three hours per day • Any student attendance over three hours is added to the hours plus column (banked) • Use **Staff** in Sections in School Options • **Flex Periods** • **Class Calendars** • **Custom Bell Schedule** • **Grade** or Secondary Standards Based **Grades Report Cards** • Attendance Documentation • Flex Scheduling Documentation

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Flex Attendance School Options

Pre-Requisites – The Feature Flags for Flex Scheduling and Use Staff ID Based Counselor Tracking must be enabled for the district.

If these are not already your School Options settings, DO NOT change them in the current year or mid-year!!!!

- The All-Day Attendance Management option should be set to <u>Attendance Time</u>, and the *Primary ADA Time field should be populated.*
- Secondary ADA time is optional and can be used for AM/PM Kindergarten Attendance
- A new option called Track Primary Classes for Students was added to the School Options page. This feature is required for elementary schools to use Flex Scheduling.
- The option is displayed next to the Scheduling Type and will only be visible when the Scheduling Type is set to 3-Flex Scheduling.
- Use Staff in Sections *must be enabled* – TCH is not used
- Use Staff ID Based Counselor Tracking will be automatically enabled when Track Primary Classes for Students is enabled

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Flex Attendance School Options

- A new option called Track Primary Classes for Students was added to the School Options page. This feature allows a school to identify a course as a Primary Class. This feature will allow elementary schools the ability to use Flex Scheduling now as well. This can only be enabled when a school has Scheduling Type as Flex Scheduling and Use Staff ID Based Counselor Tracking is enabled
- Track Primary Classes for Student – When enabled, this field provides a value for forms or reports that needs a single value for a student's teacher.
  - Think about something like the Emergency Card or Birthday Listing, and similarly on the Student Search, or the student Demographics page.
- Use Staff ID Based Counselor Tracking – this is a pre-requisite for Primary Class Tracking (Flex-Daily) for the STU.CNS field and STU.CU fields to be used.
- Use Staff in Sections – The teacher table is no longer used for Flex Attendance or Scheduling; all information is pulled from the Staff table.
  - Adds the ability to associate multiple staff members to a section (Section Staff Members) while still designating one person as a primary teacher
  - It is important to maintain the Staff (STF) table as the Scheduling tables are dependent on STF records for assigning staff members to sections.

If these are not already your School Options settings, DO NOT change them in the current year or mid-year!!!!

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Flex Attendance School Options

School Options

Code	School Name	Area	Telephone	Fax	Open Date	Close Date	Tag
990	Golden Eagle Elementary School	999	5559990				

Street Address	City	State	Zip	Extn	Country	DNR
9950 Comet Street	Eagle Point	CA	95990		US	☐

Principal's Name	Signature	Email Address	ID Type	County	District	School	Charter	Next Student ID
Ms Michele Rogers	☐		1	65	99999	9999990		0

Low Grade	High Grade	All Day Attendance Management	Primary ADA Time	Secondary ADA Time	Tracks
PS	6	Attendance Time	8:30 AM		0

	School Website			Short Name	

User1	User2	User3	User4	User5	User6	User7	User8

Scheduling Type	Track Primary Classes for Students	Use Staff In Sections	School Category	Utilize A/B Days	Session Type
Flexible (3)	Yes	Yes		Don't use A/B Days (0)	Regular (0)

Att Type	Att Reporting	Schedule Basis	Education Type
Daily (0)	Negative (0)	Trimester (1)	Not Alternative Ed (0)

Portal Confirmation Email Address	Next Year Start Date	Auto Assign Teacher Number	College Board School Code
DoNotReply@aeries.com		No	

Intervention Referral Settings

Referral Submission Notification Email Address(s):

Referral Approval Notification Email Address(s):

Bullying Incidents	Cyber Bullying Incidents	Allow Issue Credit on Classes / Course Attendance pages	Use Grading Periods Instead of Terms in Gradebook
		No	No

Use Staff ID Based Counselor Tracking
Yes

- All Day Attendance Management – Determines if attendance is entered according to an Attendance Period or an Attendance Time. For the purposes of Primary Class Tracking (Flex-Daily) Attendance, you must select Attendance Time.
  - Primary ADA time – Determines that the teacher with students in the Flex Period that occurs during the Primary ADA time is responsible for taking Attendance.
  - Secondary ADA time – Determines that for any student who does not have a Flex Period during the Primary ADA time, the teacher with students in the Flex Period that occurs during the Secondary ADA time is responsible for taking Attendance.

**This does not mean that the teacher must take attendance right at the Primary/ Secondary ADA times. That is still determined in Portal Options.

**Being a student's Primary Teacher does NOT mean that teacher is solely responsible for those student's attendance.

**Whichever teacher has a student during the Primary ADA time is responsible for attendance, this is not always the Primary Teacher, it could be the PE or Music teacher depending on Flex Period times

If these are not already your School Options settings, DO NOT change them in the current year or mid-year!!!!

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Flex Attendance School Options

School Options

Code	School Name	Area	Telephone	Fax	Open Date	Close Date	Tag
990	Golden Eagle Elementary School	999	5559990				

Street Address	City	State	Zip	Extn	Country	DNR
9950 Comet Street	Eagle Point	CA	95990		US	☐

Principal's Name	Signature	Email Address	ID Type	County	District	School	Charter	Next Student ID
Ms Michele Rogers	☐		1	65	99999	9999990		0

Low Grade	High Grade	All Day Attendance Management	Primary ADA Time	Secondary ADA Time	Tracks
PS	6	Attendance Time	8:30 AM		0

School Website						Short Name

User1	User2	User3	User4	User5	User6	User7	User8

Scheduling Type	Track Primary Classes for Students	Use Staff In Sections	School Category	Utilize A/B Days	Session Type
Flexible (3)	Yes	Yes		Don't use A/B Days (0)	Regular (0)

Att Type	Att Reporting	Schedule Basis	Education Type
Daily (0)	Negative (0)	Trimester (1)	Not Alternative Ed (0)

Portal Confirmation Email Address	Next Year Start Date	Auto Assign Teacher Number	College Board School Code
DoNotReply@aeries.com		No	

Intervention Referral Settings

Referral Submission Notification Email Address(s):

Referral Approval Notification Email Address(s):

Bullying Incidents	Cyber Bullying Incidents	Allow Issue Credit on Classes / Course Attendance pages	Use Grading Periods Instead of Terms in Gradebook
		No	No

Use Staff ID Based Counselor Tracking
Yes

Review of School Options

If you are scheduling in the current year database (2023-24) and Scheduling for Next Year, *DO NOT CHANGE* the School Options page, since the options control the current year's database.

After the New Year Rollover, in the 2024-2025 database, verify these fields:
- Scheduling Type: Flexible (3)
- Track Primary Classes for Students: Yes
- Use Staff in Sections: Yes
- Att Type: Daily
- Att Reporting: Negative
- All-Day Attendance Management: Attendance Time
- Primary and Secondary ADA Time: These times determine which Teacher/Section takes attendance. The Secondary ADA Time will be used for students who do not have a Section meeting at the Primary ADA Time.
- Use Staff ID Based Counselor Tracking: Yes

If these are not already your School Options settings, DO NOT change them in the current year or mid-year!!!!

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Flex Attendance ADA Times

In School Options, the Primary ADA Time and Secondary ADA Time may be used to accommodate taking attendance in AM and PM classes.
- The Primary ADA Time should be assigned a time that falls within the Flex Period for the AM class.
- The Secondary ADA Time should be assigned a time that falls within the Flex Period for the PM class and should not overlap with the AM Flex Period.

Teachers will see both the AM and PM Section in Teacher Attendance

The following option – *Attendance to be Taken (Marked as Complete) by Section - must be enabled in Portal Options for a Flex School.*

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Other Tables that are Important to Flex Attendance

- Flex Periods (FTF) – Determine what time a Section (Class/Period) meets.
  - There is no longer a default Bell Schedule in a Flex School

- Class Calendars (CCL) – Determine what days a Section (Class/Period) meets
  - There is no longer a Block Schedule Calendar

- Custom Bell Schedules (BSD/BST) – Define what time a Section (Class/Period) meets WHEN the Section (Class/Period) will meet at a time other than the standard time defined in the Flex Period Table
  - Custom Bell Schedules must be created AFTER the New Year Rollover, in the new database.

Flex Period Guidelines and Best Practices

Flex Periods –

Determine what time a Section (Class/Period) meets as there is no longer a *default* Bell Schedule in a Flex School

Table	Permission	Description
Flex Periods (FTF)	Read Insert Update Delete	View Flex Periods Add Flex Periods Update existing Flex Periods Delete Flex Periods
Flex Period Times (FTT)	Inherited from FTF table.	Hidden from Security page.

- Flex Periods must be assigned for each **Academic Year**. Make sure to assign Flex Periods with the correct Academic Year to your SMS/MST Sections
- Each Flex Period is assigned a sequence number **Rcd ID** that is used as a primary link in other tables such as MST/SMS
- A **Short Title** can contain up to 6 characters and cannot be duplicated in the same academic year. A blank Short Title is not allowed and will result in a popup error when attempting to save the record
  - Creating proper naming conventions of short titles will allow for an easier understanding of their meaning. Numbered short titles are also acceptable to resemble current period types
- A **Tiny Title** is optional and can be used to shorten a flex period short title even further. This field is limited to 2 characters
- A **Description** can be added for informational purposes.
- All Flex Periods must contain a **Start Time and End Time**.
- The **Type** field is also important for scheduling purposes to avoid scheduling conflicts
  - Non-Conflict Flex Periods assigned to SMS/MST sections will not check for date/time conflicts or overlaps for these sections. ***It is recommended to Exclude Sections assigned to Non-Conflict Flex Periods from Attendance.***
    - Unless there is a compelling reason to have that attendance data recorded for a section assigned to a Non-Conflict Flex Period, schools should carefully consider whether to have teachers take attendance, as there could be confusion over when a student should be marked absent.

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Creating Flex Periods

1. Press the **Add** button (if no Flex Periods exist, press **Add New Record**).
2. Select the **Academic Year**: current or next (for Scheduling).
3. Enter the **Short Title**, which will be displayed on reports and is a maximum of six characters. **Short Title** can't be duplicated in any other Flex Period in the same **Academic Year**.
4. The **Tiny Title** can be one or two characters.
5. The **Description** can be up to fifty characters: spell out any details needed.
6. The **Start Time** and **End Time** for this Flex Period on a regular school day.
7. **Type** = blank is a Standard Flex Period. C = Non-Conflict Flex Period (for example, pullout sections). The Scheduling process will not check date/time conflicts for Non-Conflict Flex Periods. Students will be scheduled into sections in this Flex Period based on available seats, even if the section meets at the same time/date as another section.
8. Press **Save**.
9. Under **Bell Schedule Times**, edit any Custom Bell Schedule that will affect the **Start Time** or **End Time** for this Flex Period and Save.

Flex Periods

Rcd ID	Academic Year	Short Title	Tiny Title	Description	Start Time	End Time	Type
48	2023-2024	AttP2	A2	Attendance Period for 2nd Graders	8:15 AM	2:45 PM	Standard Flex Period

1 Add Change References

Flex Periods

Rcd ID	Academic Year	Short Title	Tiny Title	Description	Start Time	End Time	Type
2	2023-2024	3	4	5	6	7	Standard Flex Period

8 Save Cancel

Bell Schedule Times

	Bell Schedule	Bell Schedule Title	Start Time	End Time
	1	Minimum Day	9	

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Class Calendar Guidelines and Best Practices

Class Calendars –
Determine what days a Section (Class/Period) meets as there is no longer a Block Schedule Calendar or MST Split Term

Table	Permission	Description
Class Calendar (CCL) *Only Admin Users may Copy/Push a Class Calendar*	Read Insert Update Delete	View page Add new record Update records Delete Records
Class Calendar Details (CCD)	Inherited from CCL	Hidden in Security page.

To avoid scheduling issues, you should create one Class Calendar per Flex Period!
*** *Warning: Any other convention will cause issues if you ever need to change a meeting day for just one Flex Period*

- Class Calendars must be assigned for each **Academic Year**. Make sure to assign Class Calendars with the correct Academic Year to your SMS/MST Sections
- Each Class Calendar is assigned a sequence number **Rcd ID** that is used as a primary link in other tables such as MST/SMS
- A **Short Title** can contain up to 6 characters and *cannot be duplicated in the same academic year*. A blank Short Title is not allowed and will result in a popup error when attempting to save the record
    - Creating a naming convention of short titles to pair with the associated Flex Period will allow for an easier understanding of their meaning. Numbered short titles are also acceptable to resemble current period types
- A description can be added for informational purposes
- Admin type users may Copy Class Calendars or Push Class Calendars to other schools

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Creating Class Calendars

1. Press the **Add** button (if no Class Calendars exist, press **Add New Record**).
2. Select the **Academic Year**: current or next (for Scheduling).
3. Enter the **Short Title**, which will be displayed on reports and is a maximum of six characters. **Short Title** can't be duplicated in any other Class Calendar in the same **Academic Year**. **Recommendation:** match the **Short Title** of the "paired" Flex Period.
4. The **Description** can be up to fifty characters: spell out any details needed.
5. Press **Save**.
6. Press **Edit** Calendar to manually check or un-check dates. Press **Disable Editing** when finished **or** . . .
7. Press **Mass Select Dates.**
8. On the Select Days popup, check the appropriate day checkboxes. Note that after the New Year Rollover, when the school Calendar is added, holidays will automatically be reflected in the appropriate Class Calendars. A **Skip no-school dates** checkbox will be displayed if Class Calendars are being created for the current school year; check to skip holidays in the school Calendar.
9. The date range should start before school begins and end after school ends (it does not have to exactly match next year's school Calendar).
10. Press the **Add Dates** button.

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Flex Attendance Reports

- Many reports have been converted/enhanced for Flex
- Reports will look different due to the complex nature of the Flex Period naming convention capabilities
- Some reports take up more pages now, other reports utilize a smaller font than before
- There are future enhancements coming to some reports
- Utilize Aeries Ideas if you have report suggestions
- Link to All Flex Reports

Flex Attendance Queries

Many queries have been converted for Flex - <u>Attendance Query Bank</u>
- Look for the Blue Font to indicate the Flex version of the Attendance Query you are looking for
- Although an exact query match may not be in this document, please always start here and find a base query to edit and build upon

Primary Teacher Extended Fields for Query - Primary teacher related extended fields are available in Aeries Query that will only be available for schools that have the Track Primary Classes option enabled. These fields evaluate each student's class schedule and finds the current Primary Class with the corresponding Primary Teacher from Section Staff (SSE).
- PRIMARYTEACHERNAME
- PRIMARYTEACHERID (Staff ID of the primary teacher)
- PRIMARYCOURSENAME
- PRIMARYCOURSEID
- PRIMARYSECTIONNO.

Table and Field Conversions

The main tables/fields that have been converted for Flex Scheduling are:

- Teacher ID - Uses Staff (STF.ID) instead of Teacher (TCH.ID)
- Teacher Name - Uses Staff (STF.LN and STF.FN) instead of (TCH.TE)
- Primary Teacher - An indicator in the Section Staff Members section in MST or SMS (SSE or SSM) marked as "yes" will identify a Primary Teacher. Only one primary teacher is allowed in each section.
- Past Primary Teacher - An indicator in the Section Staff Members section in MST (SSE table) when marked with a "Yes" will identify a teacher who was previously a Primary Teacher and is now a Past Primary Teacher.
- Start Date - The date a teacher was identified as being associated as a Primary or Past Primary teacher of the section.
- End Date - The date a teacher was identified as no longer associated as a Primary or Past Primary teacher of the section.
- Period - Uses Flex Periods (FTF.STI) short title instead of Scheduling Master Schedule Periods (SMS.PD) or Master Schedule (MST.PD)
- Calendar - Uses Class Calendar (CCL.STI) short title instead of Days (MST.DY or SMS.DY)

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Helpful Links

Elementary Primary Class Scheduling - Getting Started

Elementary Primary Class Scheduling - School Options

Flex Elementary - AM and PM Attendance Setup

Flex Scheduling - Class Calendars

Flex Scheduling - Flex Periods

Flex Scheduling - Bell Scheduler

Flex Scheduling - Staff Data

Flex Scheduling - Track Primary Classes

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Key Takeaways

- Do not change School Options now, these changes are for next year

- Flex Scheduling and Use Staff ID Based Counselor Tracking must be enabled in Feature Flags

- **STF is used instead of TCH**

- Primary ADA time must be utilized for Flex Daily schools

- **AM/PM class setup is available with Primary and Secondary ADA Times**

- Track Primary Classes for Students and Use Staff in Section must be utilized for Flex Daily Schools

- Flex Periods determine what time a Section will meet

- Custom Bell Schedules determine what time a Section will meet *IF* the class is meeting at a time that is *NOT* the default Flex Period time

- Class Calendars determine what days a Section will meet

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Related Sessions

Other Sessions Related to Flex Attendance
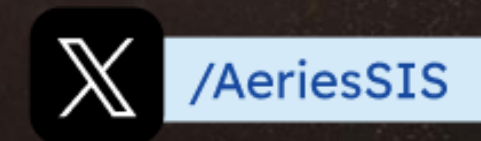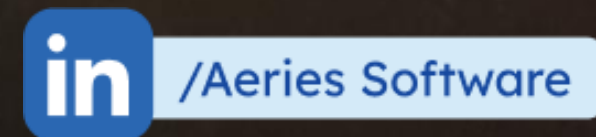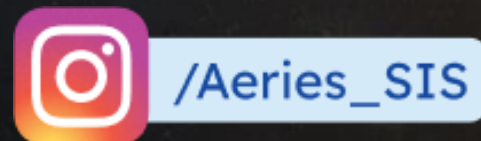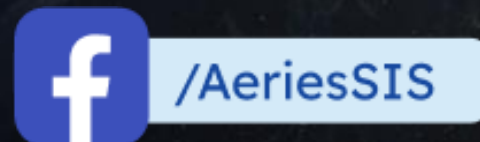- Session 372 Flex Attendance – Period

Other Sessions Related to Attendance
- Session 350 Attendance Setup and Configuration
- Session 361 Reconciling Attendance – (Daily) – Daily, Monthly, District Level Procedures
- Session 371 Reconciling Attendance – (Daily) – Daily, Monthly, District Level Procedures
- Session 470 Independent Study

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THANK YOU!

Please take a moment to complete our session survey at
http://surveys.aeries.com/s3/AeriesCon-Session-Feedback-Survey-Spring-2024

For further questions about Flex Attendance Setup, visit Open Forum, or open a Support Ticket at
https://support.aeries.com/support/home

/AeriesSIS   /Aeries_SIS   /Aeries Software   /AeriesSIS

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Share your Feedback:

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