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740 Enrollment Management

Part 1 of 2

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What is Enrollment Management?

Enrolling and withdrawing students, end of year, beginning of year and during the year enrollment processes are all part of keeping the data consistent for enrollment purposes when creating School, District or State Reports.

Using the “rules & tools” recommended by each Aeries Process will create accurate reports and submissions.



Develop “Best Practices”

- Become familiar with Aeries Processes from Aeries Support documentation

1

State Reporting Data Reqmts & Procedures (see Calpads)

2

School Startup

3

Enrollment Data Management

4

Enrollment Process

5

Student Withdrawals

6

Matriculators & Grads/Completers



1. CALPADS Data Requirements – Related to Enrollment

- Student Enrollment (SENR) – this includes enrollments and exit data for students
- Student Information (SINF) – this includes grade level changes for continuing students
- Student Program (SPRG) – this includes program related data for enrolled students
- Student English Language Acquisition (SELA) – this includes English Learner student data

➤ [Calpads Data Guide](https://documentation.calpads.org/Support/References/#calpads-data-guide)

<https://documentation.calpads.org/Support/References/#calpads-data-guide>



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CALPADS End of Year SENR

Using Calpads Extracts – Other Options

- when SENR extract is completed within 14 calendar days of the last day of school, and STU.EOY & STU.HSG are blank; Aeries applies default exit codes:
 - Exit Code E155 - Assigned to all non-12th grade records will be extracted with this code.
 - Exit Code E156 - Assigned to returning 12th graders (5th year senior)
- Another automatic Extract default:
 - Exit Code 150 – Mid Year End Enrollment Update has been added to CALPADS. Aeries will automatically extract the E150 code for 440 program changes



State Reporting Disclaimer

Aeries strives to stay abreast on changes with State Reporting business rules as they are shared with SIS Vendors and our customers by FCMAT/CSIS, California CTE, CALPADS and CDE.

Aeries would like to emphasize it is ultimately the LEA's responsibility to stay up to date with State reporting updates and Aeries Web Revision Updates to ensure they are in accordance with reporting elements and have access to any new fields in Aeries as a result of these changes.

LEAS should not solely rely on the contents of this presentation as the rules and regulations on the following topics have the potential to change at any time.



2. School Startup

At the beginning of the school year, before school starts use:

➤ **Use the School Startup Task Chart:**
<https://support.aeries.com/support/solutions/articles/14000088873-school-startup-task-chart>

➤ **Set up the No Show Setup Form:**
<https://support.aeries.com/support/solutions/articles/14000070848-no-show-setup>

➤ **Use the No Show Guidelines Chart:**
<https://support.aeries.com/support/solutions/articles/14000088873-school-startup-task-chart>

Student Prior Year Enrollment	SSID Obtained?	Student Current Enrollment	Exit Code	Exit Date	No Show Form
Enrolled E155 Submitted	Yes	Unknown	Inactivate Student Attendance Reason: E140 - NoKnownEnrollTruant	Leave Date: Student must be unexcused for a minimum of three days. Districts must make every attempt to locate the student, including checking CALPADS for enrollment.	No
Enrolled E155 Submitted	Yes	Another California Public School	No Show Student Summer Withdrawal Code: 160 - TransCASchRegular	Summer Withdrawal Date: Last day from prior year	Yes
Enrolled E155 Submitted	Yes	Private School, Out of State, Out of Country, etc.	No Show Student Summer Withdrawal Code: T180 - Private School T200 - Out of State T240 - Out of Country, etc.	Summer Withdrawal Date: Last day from prior year	Yes
Not Enrolled on Last Day of Prior Year	Yes	Unknown Private School Out of State Out of Country Another California Public School	No Show Student Summer Withdrawal Code: N470 - NoShow	Summer Withdrawal Date: After July 1st, but prior to first day	Yes
Never Enrolled	Yes	Unknown	No Show Student Summer Withdrawal Code: N470 - NoShow	Summer Withdrawal Date: After July 1st, but prior to first day	Yes
Never Enrolled	No	Private School, Out of State, Out of Country, etc.	No Show Student Summer Withdrawal Code: N470 - NoShow*	Summer Withdrawal Date: After July 1st, but prior to first day*	Yes

3. Enrollment Data Management

Three basic steps to Enrolling a student into the current schoolyear:

1. Click 'Add' on any Student Demographics page
 - Add required data information* determined as best practice
 - Elementary – Add teacher to STU.CU before Update Att button
2. Click 'Update Attendance'
 - This activates enrollment to create an attendance enrollment record
3. Go to Classes page to assign sections/classes
 - Elem wPrim Class, Elem w MST, and Secondary – Add classes with correct start date

*See Aeries Support Documents - Enrollment Process

<https://support.aeries.com/support/solutions/articles/14000069482-enrollment-process>

or TX Enrollment Process

<https://support.aeries.com/support/solutions/articles/14000138120-texas-enrollment-process>



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4. Enrollment Process for the 5 Types of Students to Add/Enroll

- A. A New Student
- B. A Transfer Student
- C. A Returning Student
- D. A Pre-enrolled Student
- E. Pre-enrolled Matriculating Students

Let's take a look at each of these...



A. Add/Enroll a New Student (in the Current School Year)

- ❑ Adding/Enrolling New Students -- Use “Best practice” entering data:
 - Search for all Students – Did they attend in a prior year? Are there Siblings?
 - Correct Start date - Does it match enrollment attendance enter date?
 - Enter State and/or District Required Information Fields – Have Required Fields been setup?
 - Add contacts into Contacts page – add for one student before adding additional siblings, so that info can be copied to all siblings
 - Add Record Access Log data (if applicable)
 - Update Programs (if applicable)
 - Update Language Assessment (if applicable)



(in the Current School Year)

B. Add/Enroll a Transfer Student

- ☐ Transfer a student from another school in your district.
 - Search Criteria for Students with an inactive tag; if student is not inactive yet, ask the other school to inactivate
 - Update student information

C. Add/Enroll a Returning Student

- ☐ Returning Student (active->inactive->active again)
 - Remove Inactive Status tag
 - Update student information
 - Update student enter date



(in the Current School Year)

D. Pre-enroll a Student

- ❑ Manually Pre-enroll “Register” Students (new students starting at a later date or next school year’s Kinders)
 - Assign the Pre-Enrolled Status tag = “ * ”
 - Follow the standard data entry for new student’s; but **DO NOT** Update Attendance



E. Pre-enroll Matriculating Students for Next School Year

(in the Current School Year)

- adding existing student records within your District, from one school/grade to another; or a group of students from another school outside your District

- ❑ Create Pre-enrolled Students Process, including which data should be imported; then use either:
 - Copy Many Student Record
 - Import Data to Aeries – Import Students

- ❑ Always verify the following data, so that New Year Rollover is accurate:
 - Next Grade (if a retained student, set NG to same grade as current year)
 - Next School/Reporting School - Next Teacher (for traditional elem)
 - Inter/Intra-District Data



Key Takeaways



Develop & Set “Best Practice” Data Collection Procedures for your school



Become Familiar and Know How to Locate Aeries Freshdesk Resources to Ensure Accurate Data



Understand the different types of Enrollments and Withdrawals



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4. End of Year Withdrawals (on Student Data 2)

- ❑ Matriculators– students reaching the highest grade level and going to a different school, in or outside your district
 - NO Inactive tag
 - STU.EOY = Status code 230 (also automatic when HSG data exists)
 - STU.HSG = Exit Code 480

- ❑ Graduates/Completers
 - NO Inactive tag
 - STU.EOY = Status code 230
 - STU.HSG = Completion Status Code (how did student finish high school?)

Calpads Withdrawal Data Population Chart

<https://support.aeries.com/support/solutions/articles/14000085801-eoy-2-calpads-student-withdrawal-data-population-chart>



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4 Types of Student Withdrawals (inactivating students)

Student Withdrawal:

<https://support.aeries.com/support/solutions/articles/14000069483-student-withdrawals>

1. Inactive – student leaves during the current school year
 - Status Codes – do you know your inactive codes?
 - Update Attendance to create an enrollment end date
2. Summer Withdrawal – after rollover in the new year database, the student leaves during the summer (after last day of prior school year & before first day of current)
 - Enter exit reason, leave date, next school on Student Data 2
3. No Show – only used at start of new school year, student is absent with unknown whereabouts
 - No Show Guidelines Chart <https://support.aeries.com/support/solutions/articles/14000050200-no-show-guidelines>





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More “Best Practices”

➤ Use these Aeries Configurations, settings & reports to support accurate Data Collection

1

Define Required Fields page

2

Define Custom Captions

3

District Settings

4

Student Search Criteria & District Student Lookup

5

Various Audit reports & Queries



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1. Define Required Fields

Where to find Required Fields

- School Information
- Configuration
 - Define Required Fields

Select a Table

Select Required Fields

Required Fields

Select Table:

Student Demographics - STU

Required Fields

Save

Name	Field Code	Required?	Low Value	High Value
Student#	SN	<input type="checkbox"/>		
Last Name	LN	<input checked="" type="checkbox"/>		
First Name	FN	<input checked="" type="checkbox"/>		
Middle Name	MN	<input type="checkbox"/>		
Student ID	ID	<input type="checkbox"/>		
Gender	GN	<input checked="" type="checkbox"/>		
Grade	GR	<input checked="" type="checkbox"/>		
Birthdate	BD	<input type="checkbox"/>		

2. Define Custom Captions

School Into > Configurations> Define Custom Captions

- Add a Title to User Field boxes to clarify coding requested
- All Tables that contain User Fields available on Select Table

The screenshot shows the 'Student Information System' interface. On the left is a sidebar with a search bar and a menu. The menu items include 'Pages', 'Reports', 'Favorites', 'Filter Pages...', 'General Settings', 'Student/Parent Alerts', 'Configure Lunch Balance Notifications', 'Configure Vaccination Requirement', 'Course History Institutions', 'Custom Reports', 'Default Code Management', 'Define College Entrance Test Codes', 'Define Custom Captions' (which is highlighted), and 'Define Custom Tables'. The main area is titled 'Define Custom Captions'. It features a 'Select Table:' dropdown menu currently set to 'Student Demographics - STU'. Below this is a table with the following structure:

Name	Field Code	Caption
User1	U1	<input type="text"/>
User2	U2	<input type="text"/>
User3	U3	<input type="text" value="Speech"/>
User4	U4	<input type="text" value="Photo?"/>
User5	U5	<input type="text" value="Band"/>
User6	U6	<input type="text" value="GATE"/>



3. District Settings

- School Information
- Configuration
- District Settings
- Set Student Settings Options

Student Information System

Search students...

Pages Reports Favorites

Filter Pages...

Electronic Score Report Manager

School of Choice Management

Student Groups

View Logged In Users


Street Address Management

Portal Management

Configurations

District Settings

District Settings

 Be very careful when changing these Settings!

Changes may not take effect for up to 5 minutes due to caching.

Student Settings	
<input checked="" type="checkbox"/>	Students must be inactive at last school before enrollment at another school.
<input checked="" type="checkbox"/>	Use STU.TG to determine if a student is inactive at last school when transferring records.
<input checked="" type="checkbox"/>	Transferring (Copy Student) from the District Student Lookup (Multi-Year District Search) requires User to have Student Administer permission.
<input type="checkbox"/>	Assign new student ID numbers from district database only, not from school.
<input type="checkbox"/>	Automatically populate student photograph (STU.BM) with student ID (STU.ID).
<input type="checkbox"/>	<input type="text"/> Default Gender Code



4. Add – Search Criteria & District Student Lookup

- ☐ Verify Security Permissions for Read-Insert-Update for Student-related Data in current year
- ☐ Verify Security Permission for District Student Lookup (to add from Prior Years)
- ☐ Set procedures for using Student Search Criteria page
 - Every District has their own procedure
 - Should include search on basic student data for current & prior years, and Search Sibling



5. Verify Your Student Enrollment Data ...using Reports & Queries

- Calpads Log Details
- Student Counts by Grade & Race/Ethnicity (CBEDS)
- Audit Reports
 - Print Enrollment Audit Listing
 - Print Student Data Audit
 - Attendance Audit Listing Report
 - Course Attendance Audit Report
- Student Data Management Queries
<https://support.aeries.com/support/solutions/articles/14000094525-student-data-management-queries>
- Your Own Saved Queries or FreshDesk Sample Query/Query Bank
<https://support.aeries.com/support/solutions/articles/14000095910-sample-queries-query-banks>



Finally... develop a “Best Practices” Schedule using these Audit & Verification Tools (How often? By whom?)

Student Data Audit Report

- Weekly, (daily at the start of school)
- Registrars, School Managers

Student Enrollment Audit Report

- Weekly, (daily at the start of school)
- District or School Managers

Calpads Log Details & Student Counts

- Before state reporting
- District Staff

Attendance Audit Listing

- Weekly, (daily at the start of school)
- School Manager, Attendance Staff

Course Attendance Audit Report

- Weekly, (daily at the start of school)
- Counselors, Attendance Staff

Data Queries

- As needed, weekly
- All users responsible for data entry

Key Takeaways



Develop & Set “Best Practice” Data Collection Procedures for your school



Use Aeries Tools and Resources to Ensure Accurate Data



Verify Data Using Queries and/or Audit Reports on a regular basis



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Share your Feedback:



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THANK YOU!

Related Conference Sessions:

- ❖ 350 – Attendance Setup and Configuration
- ❖ 660-1 Managing Eng Lang Data for Students
- ❖ 701 – CALPADS Basics: Student Data Mgmt
- ❖ 702 – CALPADS Basics: Program Data Mgmt
- ❖ 973-1 - Intro to Data Validations
- ❖ Any session with Management in the title!

