Session 470
Independent Study
Attendance Management

Presenter

Adriana Quick

Aeries Support Analyst

Welcome to AeriesCon

- Hello! My name is Adriana Quick I have been with Aeries for almost 3 years now . Prior to Aeries I was with Santa Monica-Malibu Unified for 3 years and with Santa Barbara Unified for 13 years.

- Time permitting, I will also go over Independent Study Agreements

- Please make sure and fill out survey after session is complete by visiting the link below:

  http://surveys.aeries.com/s3/AeriesCon-Session-Feedback-Survey-Spring-2024

Full Documentation on Independent Study can be found in the link below:

https://support.aeries.com/support/solutions/folders/14000116339

Independent Study Overview

- The State of CA requires that the reporting of Independent Study MUST be separate from regular attendance.

- Two absence codes must be set up in the Absence Code Table. One must indicate IS work assignments are incomplete and the other must indicate IS work assignment have been completed.

- A code for the Independent Study program must also be setup in the Code table for STU.SP. Students can then be added to the Independent Study program from the Student Data form and the Attendance Enrollment can be updated to place the student into this program.

- Students on long term or short term IS contracts should NOT be recorded as having excused or unexcused absences.

Update Code Table

A code for Independent Study program must be setup in the Code table for the Student Program (STU.SP) field . Students can then be added to the Independent Study Program.

Updating the Code Table:
From the Navigation tree > School Info > Configurations > Update Code Table > Add a code for the "Independent Study " Program. This code will now display on the Student Data form in the STU.SP field drop down.

Update Absence Code Table

Two Absence codes must be setup in the Absence Code Table. One must indicate Independent Study work <u>Incomplete</u> and the other must indicate Independent Study work <u>Complete.</u>

Updating Absence Code Table:
From Navigation Tree >
 Attendance Accounting >
 Configurations >
Update Absence Code Table

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Update Absence Code Table

Example N=Incomplete

- Code : N
- Description : ID STD INC
- Abbreviation : ISU
- Independent Study Option: Incomplete
- Verified Not Absence and <u>Count for ADA flag set to NO</u>

Example Q = Complete

- Code: Q
- Description : ID STD COM
- Abbreviation : ISC
- Independent Study Option : Complete
- Verified Not Absence and <u>Count for ADA flag set to YES</u>

In order to report the Independent Study sections correctly to CALPADS, only IS students should be enrolled in an IS section. A value of Y in the Independent Study Indicator (MST.ISI) field will report the section as IS in the CALPADS extract

Note: Alt Ed Sched Enabled – This option will allow sections in traditional high school to be flagged as an Alternative Education Section if in School Settings you have Allow Individual Sections to be Flagged for Alt Ed Scheduling. See documentation for Alt Ed Scheduling for Individual Sections for more information.
https://support.aeries.com/support/solutions/articles/14000131753-alt-ed-scheduling-for-individual-sections

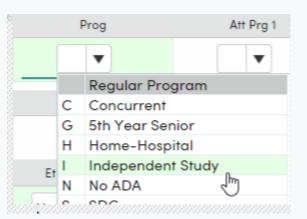# Independent Study Program Add and Update Attendance Enrollment

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To add a student to the IS program, Go to Student Data > Demographics page

Click Change at bottom of page to populate the Program field – Select IS code and click Save

The following message will display in red. This message indicates that the student's Attendance Enrollment needs to be updated to match the Student Demographics .

Click on the Update Attendance button at the bottom of the Student Demographics form to update student's enrollment with IS code.

Leave Date: The last day the student will be in regular program

Enter Date: First day student will start Independent Study

Click OK

Now you will see the student's Attendance Enrollment displays the new enter record in the Independent Study Program

| Import | Add | Change | Delete | Update Attendance |

Attendance Change Form

Leave Date	Grade	Program	Att Pgm1	Att Pgm2	Track	NPS SpEd	Rptg Schl	Intr Dist	District of Residence	Reason
3/3/2021 ▼	12					3030228	0			440 ▼

Enter Date	Grade	Program	Att Pgm1	Att Pgm2	Track	NPS SpEd	Rptg Schl	Intr Dist	District of Residence	Reason
3/4/2021 ▼	12	I				9999994	0			▼

OK | Cancel

Current Attendance Enrollment

	Date	Ent/Lv	Grd	Prg	Trk	Reason	NextSchl
✏️	3/4/2021	E	12	I			0
✏️	3/3/2021	L	12			440	0
✏️	7/15/2020	E	12				0

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When student returns from Independent Study, <u>remove</u> the Independent Study code from Program field (STU.SP) > Click on Update Attendance button at the bottom of Student Demographics > The Update Student Attendance form will display .

<u>Leave Date:</u> Enter the last day the student will be in Independent Study
<u>Enter Date:</u> Enter the first day the student will start back in Regular Program

Update Attendance button at the bottom of Student Demographics Screen

Attendance Enrollment will now reflect the change

Change Incomplete Code to Complete in ATT

The teacher must provide a document indicating which dates the student completed the assignments. The Incomplete attendance code can then be changed to the Complete attendance code for the dates given.

From Attendance form, click on the Incomplete Attendance code and enter the Complete code. Press Enter to change the code.

Changing Incomplete Code to Complete can also be accomplished on the Attendance Management form. See documentation for more information: https://support.aeries.com/support/solutions/articles/140 00093306-attendance-management

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Independent Study Attendance Reports

Monthly Attendance Summary
From View All Reports the Monthly Att Summary report is available. The Student Program (STU.SP) attendance totals will be separate from the regular program students

Monthly Attendance Report
The Student Program (STU.SP) attendance totals will be a separate page from the regular program students.
This report shows the details of what the monthly attendance summary is counting

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Monthly Attendance Summary Report Continued

Monthly Attendance Summary
Legal Size Version
Incomplete IS and Complete IS Attendance totals are displayed in separate columns

Print Monthly Attendance Summary Report Options

Report Format: PDF

Report Delivery: None

Print For Which Month?
1: 07/04/2022–07/29/2022

Recompute YTD Information: ☑

⚠ **Recomputing Month 1 will delete ALL records in YTD.**

Re-run ALL Months up to the selected month: ☐
Ignore AP1 and AP2: ☐
Print Legal size for Unv Abs and I.S.: ☐

Run Report

Screaming Eagle High School

3/3/2021
1:42 PM

2020-2021

MONTHLY ATTENDANCE SUMMARY
Month 9 - From 2/15/2021 Through 3/12/2021

Page 5

Program I Independent Study

Grade Level		A Tchg Days	B Enroll-ment Carried Fwd	C Gains	D Total Enroll-ment (B+C)	E Losses	F Ending Enroll-ment (D-E)	G Days Not Enroll	H Days Non-Apport Attend	I Actual Days (A*D)	J Total Apport Attend (A*D)-G-H	K Total A.D.A. (J/A)	L Percent Attend J/(A*D)-G	M Loss at End of Last School Day	N Unverified Absences	O Incomplete Independent Study	P Complete Independent Study	Q Total Apport Attendance	R Days Taught	S Total ADA (Q/R)
																	YEAR TO DATE		
9	TOTAL	19	4	3	7	1	6	42	11	133	80	4.21	87.91%	0	0	10	5	400	169	2.37
10	TOTAL	19	5	0	5	1	4	14	1	95	80	4.21	98.77%	0	0	0	1	469	169	2.78
11	TOTAL	19	2	1	3	1	2	14	3	57	40	2.11	93.02%	0	0	2	2	262	169	1.55
12	TOTAL	19	1	1	2	1	1	13	1	38	24	1.26	96.00%	0	0	0	5	135	169	0.80
TOTAL 9-12		19	12	5	17	4	13	83	16	323	224	11.79	93.33%	0	0	12	13	1266	169	7.49
PROGRAM		19	12	5	17	4	13	83	16	323	224	11.79	93.33%	0	0	12	13	1266	169	7.49

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Long Term Independent Study

If you have a Long-Term Independent Study School that is set up separately, recommended **School Options** :
NOTE: You do not need to populate the Student Program (STU.SP)

School Type :
Elementary with Master

Attendance Type:
Daily

Attendance Reporting type:
Negative or Positive

School Options

Code	School Name		Area	Telephone	Fax	Open Date	Close Date	Tag
997	Eagle Long Term Independent Study							

Street Address	City	State	Zip	Extn	Country	DNR
		CA			US	☐

Principal's Name	Principal's Email Address	ID Type	County	District	School	Next Perm ID
		1				0

Low Grd	High Grd	Att Pd	Tracks	User1	User2	User3	User4	User5	User6	User7	User8
7	12	0	0								

School Type	Utilize A/B Days	Session Type	Gender Codes
Elem w/MST (2)	Don't use A/B Days (0)	Regular (0)	Males & Females (1)

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

If using Post Attendance by Month option in Portal Options for Teacher Attendance , the Attendance Reporting Type MUST be set to POSITIVE ATT
For more information on teacher portal attendance see link below:
https://support.aeries.com/support/solutions/articles/14000070947-independent-study-teacher-portal-attendance

Reporting Home School-Virtual School

In a Virtual School environment, the **Reporting Home School** (**STU.HS**) field should be populated. The **Reporting Home School** field is located on the **Student Demographics** page on the **Student Data 2** tab.

NOTE: If students will receive a transcript, *each teacher must have at least one section* (placeholder section) in the master schedule. The teacher's section number must be entered in **Transcripts (HIS)** for all courses taken with the teacher. This ensures that the course information will be extracted in the CALPADS submissions

For more information on using Virtual School and Reporting Home School field, see links below:
https://support.aeries.com/support/solutions/articles/14000083267-when-should-a-home-reporting-school-option-be-used-
https://support.aeries.com/support/solutions/articles/14000134627-how-can-i-have-transcripts-reflect-the-home-reporting-school-
https://support.aeries.com/support/solutions/articles/14000085801-eoy2-calpads-student-withdrawal-data-population-chart

Independent Study Teacher Portal Attendance

Attendance can be entered by the month for teachers using Teacher Portal. This option is ONLY available to schools set up as Elementary w/Master-POSITIVE Attendance

The System Administrator must configure the schools Portal Options to allow Post Attendance by the Month

This Option will allow teachers to take attendance on a monthly basis. Teachers can click on the check mark for each day to enter the Complete Code

Month: 01/22/2018 - 02/16/2...

Stu#	Name	1/22	1/23	1/24	1/25	1/26	1/29	1/30	1/31	2/1	2/2
2	Burnett, Brandy	☑	N ☐	☑	☑	N ☐	☐	☐	☐	☐	☐
1	Miller, Tom	☑	N ☐	☑	☑	N ☐	☐	☐	☐	☐	☐

Portal Options

Absence Codes must be configured correctly in Portal Options when using Post Attendance by the Month for an IS School

Attendance Codes : Unverified Absent (usually "A") should be populated with Incomplete IS Att Code

Present (usually P) should be populated with the Complete IS Att Code

Allow teachers to override verified absences should be selected

Mark Absent if Not Present will allow teachers to mass add the Incomplete Att Code to all the students in the class by clicking on the box at the top of the attendance date.

Independent Study Agreements

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Spring 2024

Independent Study Agreements

The **Independent Study Agreements** page allows Independent Study Agreements to be documented by office staff and uploaded into Aeries. A Signatory tab identifies all Stakeholders who are required to sign the Agreement. Signatory records can be digitally signed by Parents, Students, Teachers and Staff.

You can find Independent Study Agreements by navigating to Student Data > Programs > Independent Study Agreements

Student Data

Programs
- Independent Study Agreements
- Independent Study Management

Independent Study Agreements

| | Alice Abbott ∨ | | General Contact Addt'l Info Flags 0 Programs 0 User Codes ∨ |

Independent Study Agreements   ⊕ Add Agreement

✎ Planned 09/01/2021 - 12/17/2021   Activated

Actual Start Date 09/01/2021   Actual End Date 12/17/2021   Evaluation Period School Pattern

More Info ∨

Documents And Signatures

English PDF   📄 View Agreement

Name	Relationship	Account Type	Account Details	Email	Supervisor Teacher	Date Signed
Alice Abbott	Student	PWA	15395	alice.abbott2@gedu-demo-aeries.com	No	09/09/2021
Claudia Abbott	Parent	PWA	154	ClaudiaAbbott@example.com	No	09/09/2021
Michelle Acosta	Teacher	UGN	1382	macosta01@gedu-demo-aeries.com	Yes	09/08/2021

To allow Digital Signatures you will need to enable **Allow Digital Signatures** option in District Settings. Only signatories that have a login account for the Aeries Portal can **Digitally Sign** the agreement.

For more information on District Settings see link below:

https://support.aeries.com/support/solutions/articles/14000076634-district-settings-district-rules-

Independent Study
☑ Allow Digital Signatures

Independent Study Digital Signature Text Confirmation

English

By selecting the checkbox below and typing your name in the subsequent field, you are signing this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual signature on this Agreement. By selecting the checkbox below and typing your name in the subsequent field you consent to be legally bound by this Agreement's terms and conditions. You further agree that your use of a key pad, mouse or other devices to select an item, button, icon, or similar act/action, or to otherwise provide the school or in accessing or making any transaction regarding any agreement, acknowledgment,

In order to Send a Reminder email to Parents, Students and Staff that an Agreement is awaiting their Signature, the following fields must be populated:

External Parent/Student Portal URL: Indicate the Base URL link that is used for the Parent/ Portal login Student.

External Teacher Portal URL: Indicate the Base URL link that is used for the Teacher portal login.

Portal Settings

Email Settings
Server DNS or IP:

Secure SMTP Settings
Use SSL/TLS: ☐
SMTP Port: 0

Test Email Settings
Email To Send Test To:

External Parent/Student Portal URL
https://AeriesUSD.org/parent

External Teacher Portal URL
https://AeriesUSD.org/aeries

NOTE: HOSTED districts will need to contact support to populate these fields

Adding an Agreement & Agreement Details

To create a new Independent Study Agreement, click on Add Agreement

Independent Study Agreements   ⊕ Add Agreement

ⓘ No Independent Study Agreements are currently available.

Status Options:

Draft- Beginning phase

Pending- Agreement waiting to be signed. Stakeholders cannot sign until the Agreement is placed in Pending Status.

Cancelled Prior to Activation-Clears all signatures – You can set *back to Draft or Pending in order to edit* Agreement.

Activated- Agreement has been signed by all stakeholders and is Active. When all signatures are complete the agreement is **automatically <u>Activated</u>** and NO changes can be made. (An Active Agreement can only be revoked)

Revoked-The Agreement has been voided-**This cannot be changed , reactivated or deleted.** A super confirm message will display when an agreement is revoked.

Add Agreement

| Agreement | Signatories | Work Product Evaluations |

Agreement Details

Status:
Draft ▼

Planned Start Date: Planned End Date: Actual Start Date: Actual End Date:
📅   📅   📅   📅

Type: Length Type: Evaluation Period: Reason:
▼   ▼   ▼   ▼

Notes:
NOT INTERNAL – Signatories will be able to see these notes. Please do not include any confidential information in this note...

Agreement Document

English PDF File: Language: Language:
⬆ Upload English PDF   ▼   ▼

📕 IS Agreement SAMP 🗑   ⬆ Upload PDF   ⬆ Upload PDF

Save   Cancel   Delete Agreement

Changing this agreement's status to revoked will disable future editing! ✕

⚠ To proceed with this action, You will need to enter the numbers below.

Enter the numbers above

Confirm Action

- **Planned Start Date/Planned End Date** – The proposed start/end dates. These dates autopopulated Actual Start/End Date.
- **Actual Start Date/Actual End Date** – Initially populated by Planned Start/End Dates but should be updated when the Agreement goes into affect.
- **Type** – Traditional or Course Based IS (hard coded) . User defined codes can be added to the COD table for ISA.TY
- **Length Type** – Long Term or Short Term
- **Evaluation Period** – Unique or School Pattern
- **Reason** – This is code based and allows for the school to define the drop-down information in the field.
- **Notes** –Additional Comments. The notes are visible to Parent, Student , and Teacher Portals so they should not contain confidential information

Agreement Document Options

English PDF File - This is the Agreement in PDF format and is required to be uploaded and must be a PDF file.

Language(s) - The Agreement document can be uploaded in different languages. Stakeholders sign a specific language version of the Agreement. **Confirmation Text** for the languages can be configured in District Settings. When uploading documents in other languages, an English document must be added as the default document.

Once an Agreement has been created and Signatories assigned, it should be in Draft mode for review. Once the Agreement text is finalized the Status should then be set to Pending. This indicates awaiting signatures.

Signatures can be a hand signed copy that can be scanned and uploaded manually, or digitally signed if enabled in District Settings. Once the Signatures have been completed by all Signatories, the Status automatically changes to Active.

Go to link below to find Workflow document:
https://support.aeries.com/support/solutions/articles/14000132599-independent-study-workflow-chart

Independent Study Agreement Workflow Chart

START HERE

Add New Agreement. Status will be set to **Draft.** Add Details and upload Agreement docs

Add all Signatories on Signatories tab for collection of Stakeholder signatures.

Cancelled agree-ments can be returned to Draft or Pending

Cancel Agreement

Change Status to Pending. **Collect signatures** from all stakeholders digitally or manually.

Continue with Agreement

Prior to being **Activated,** an agreement can be changed to **Cancelled Prior to Activation** Status. All signatures will be removed.

Once all Signatures are obtained, status will automatically change to **Activated**

If an agreement is **REVOKED,** record details, document uploads and signatures can no longer be edited or deleted.

Signatory changes will be locked. Agreement is now **ACTIVE.** Only option for Status change is Revoked.

Signatories

Signatories section is used to manage all stakeholders who are required to sign the Independent Study Agreement

- Select +Add Signatory button (button can be pressed multiple times if you have multiple signatures to add)
- Enter all stakeholders who require signatures on this form.
- Select Account Type and Account Details which automatically inserts the username into the Name field and type of account into Relationship.
- Check the box Supervisor Teacher if the signatory record is the Supervising Teacher.

	Account Type	Account Details	Name	Relationship	Supervisor Teacher	Signed Language	Date Signed	Signed Document	Unsigned Reminder
🗑	Aeries.net ▾	teacher teacher@ae ▾	teacher	teacher	✓	English ▾	11/05/2021	✔ Digitally Signed	
🗑	Parent/Student ▾	parent@aeries.com ▾	Adam Abbott	Parent		English ▾	11/05/2021	✔ Digitally Signed	
🗑	Parent/Student ▾	student@aeries.com ▾	Abbott, Allan James	Student		▾	🗓	⬆ Upload Signed Doc	Send a Reminder
🗑	Aeries.net ▾	Teacher2 NoWhere(▾	Teacher2	teacher	☐	▾	🗓	⬆ Upload Signed Doc	Send a Reminder

Account type has options for selecting Aeries.net, Parent/Student or None

- Aeries.net – Account Details displays the Staff that have an association with the student either by classes or as a Counselor. The field allows of searching any staff member that may not be associated with the student by class but may be required to sign the Agreement
- Parent/Student - Select the appropriate signatory that is required to sign the Agreement. If no email is found in the drop-down, change the Account Type to None. In account details you can manually enter email.

Note: Only signatories that have a login account for Aeries Portal can Digitally Sign the agreement

Note: If a Teacher is added that is not associated with the Student they can only sign Manually.

Manual Signatures/Deleting a Signatory

To Manually upload the signature, first select the Signed Language. The agreement must exist in the Agreement tab for that language in order to identify this language. Populate Date Signed, then select the Upload Signed Doc button and select the signature file.

Use the delete icon to permanently delete a signatory from the Agreement record. Use this button with caution. If an agreement is in **Active** status, it can not be deleted.

When deleting a signatory record, a 'super confirm' delete message appears. The User must enter the provided code in order to delete the record, then select **Confirm Delete**.

Digitally Sign from Portal Account

A signatory can submit the signature from within their portal account if they have **READ** permissions to **ISA**

The agreement displays Please Sign button if a signature has not been submitted . The button in ONLY available if Agreement is in PENDING Status

Teachers can only digitally sign an agreement for a student they are associated with or have access to

Independent Study Agreements

Planned 09/13/2021 - 12/17/2021   Pending

Actual Start Date 09/13/2021   Actual End Date 12/17/2021   Evaluation Period

More Info ⌄

Documents And Signatures

Pending Signature

Name	Relationship	Account Type	Account Details	Email	Supervisor Teacher	Date Signed
Parent	Parent	PWA	1	parent@aeries.com	No	✎ Please Sign

English PDF   📄 View Agreement

Name	Relationship	Account Type	Account Details	Email	Supervisor Teacher	Date Signed
Supervising Teacher	Teacher	NONE	0	superteacher@example.com	Yes	09/10/2021
RSP	RSP	NONE	0	RSP@EXAMPLE.COM	No	09/10/2021
Principal	Principal	NONE	0	principal@example.com	No	09/10/2021

Spanish PDF   📄 View Agreement

- Upon selecting the **Please Sign** option, a form displays with the text defined on the **District Settings** page. The signatory can select the appropriate form in the preferred language. An option to **View Agreement PDF** is available and should be selected and read prior to submitting the Digital Signature. Check the box "*I have reviewed the Agreement PDF and agree to the above statement*".
- An additional field displays to enter the Name of the person submitting the digital signature. Enter the name, then select **Accept and Sign.**
- Upon digitally signing an agreement, a confirmation email is sent to the signatory's email as shown below. The email includes a Confirmation ID which is stored in the **ISG.DSS** field.

View and Sign Agreement

English   Spanish

Agreement Document

✱ Please Download and Review the PDF document.
Print and Sign the document, or Digitally sign the document using the steps below.

📄 View Agreement PDF

Digital Signature

Digital Signature Agreement

By selecting the checkbox below and typing your name in the subsequent field, you are signing this Agreement electronically. Y this Agreement. By selecting the checkbox below and typing your name in the subsequent field you consent to be legally boun pad, mouse or other devices to select an item, button, icon, or similar act/action, or to otherwise provide the school or in accessi terms, disclosures or conditions constitute your signature (hereafter referred to as "E-Signature"), acceptance and agreement as other third-party verification is necessary to validate your E-Signature and that the lack of such certification or third-party verifi resulting agreement between you and the school. You also represent that you are authorized to enter into this Agreement for all persons will be bound by the terms of this Agreement.

☐ I have reviewed the Agreement PDF, and agree to the above statement.

Digital Signature

Digital Signature Agreement

By selecting the checkbox below and typing your name in the subsequent field, you are signing this Agreement electronically. this Agreement. By selecting the checkbox below and typing your name in the subsequent field you consent to be legally bou pad, mouse or other devices to select an item, button, icon, or similar act/action, or to otherwise provide the school or in acces terms, disclosures or conditions constitute your signature (hereafter referred to as "E-Signature"), acceptance and agreement other third-party verification is necessary to validate your E-Signature and that the lack of such certification or third-party veri resulting agreement between you and the school. You also represent that you are authorized to enter into this Agreement for persons will be bound by the terms of this Agreement.

☑ I have reviewed the Agreement PDF, and agree to the above statement.

Enter Your Name to Agree   ⟵

Accept and Sign

Subject: Your Independent Study Agreement Digital Signature Confirmation

👁 View   ▤ Headers   ▥ Parts

Your **Digital Signature** has been submitted to the School. Your signature represents official acceptance of this Agreement. Consent to this Agreement indicates you are legally bound by this Agreement's terms and conditions. A copy of the **Independent Study Agreement** is available and can be accessed from within your Aeries portal account.
Your confirmation ID:

Thank You

An option is available to Send a Reminder email to the Parent, Student, or Staff who are required to sign the agreement digitally. Only accounts that are linked to a PWA or UGN account can be signed digitally and have this button available next to the record on the Signatories tab. This generates an email reminding the stakeholder that the agreement is awaiting their signature. **The email text is NOT editable**

The email is sent in English for Students and Staff. Parents who have a **Correspondence Language (CON.CL)** of Spanish receive the Reminder in Spanish. Only the alternative language of Spanish is available for parents at this time.

Edit Agreement

Agreement | Signatories

Signatures   ⊕ Add Signatory

	Account Type	Account Details	Name	Relationship	Supervisor Teacher	Signed Language	Date Signed	Signed Document	Unsigned Reminder
🗑	Aeries.net ▼	teacher teacher@ae ▼	Michelle Acosta	teacher	☑	▼	📅	⬆ Upload Signed Doc	Send a Reminder
🗑	Parent/Student ▼	parent@aeries.com ▼	Adam Abbott	Parent	☐	▼	📅	⬆ Upload Signed Doc	Send a Reminder
🗑	Parent/Student ▼	student@aeries.com ▼	Abbott, Allan James	Student	☐	▼	📅	⬆ Upload Signed Doc	Send a Reminder
🗑	None ▼	marie@example.com	Marie Smith	teacher	☐	▼	📅	⬆ Upload Signed Doc	

Viewing a Signature

Once a signature has been uploaded either manually or digitally, it can be viewed. A **View Signature** button displays to the right of the **Date Signed**. If a signature was manually uploaded, the file is downloaded. If the signature was digitally submitted, the page displays the Digital Signature Agreement text, the E-Signature as it was entered by the signatory and the Signed Date.

English PDF						View Agreement
Name	Relationship	Account Type	Email	Supervisor Teacher	Date Signed	
	teacher	UGN	@example.com	No	10/01/2021	View Signature
	Student	PWA	@example.com	No	10/01/2021	View Signature
Marie Smith	teacher	NONE	marie@example.com	No	10/01/2021	View Signature
Alan Abbott	student	NONE	abbott@example.com	No	10/01/2021	View Signature

View Signed Agreement

Agreement Document

View Agreement PDF

Digital Signature

Digital Signature Agreement

By selecting the checkbox below and typing your name in the subsequent field, you are signing this Agreement electronically. You agree your ele... Agreement. By selecting the checkbox below and typing your name in the subsequent field you consent to be legally bound by this Agreement's mouse or other devices to select an item, button, icon, or similar act/action, or to otherwise provide the school or in accessing or making any trans... disclosures or conditions constitute your signature (hereafter referred to as "E-Signature"), acceptance and agreement as if actually signed by yo... party verification is necessary to validate your E-Signature and that the lack of such certification or third-party verification will not in any way aff... between you and the school. You also represent that you are authorized to enter into this Agreement for all persons who own or are authorized t... terms of this Agreement.

☑ I have reviewed the Agreement PDF, and agree to the above statement.

Marie Smith

Signed Date: 10/01/2021

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The **Work Product Evaluation** feature allows for recording Independent Study hours/days completed by the student and tracking the student's satisfactory progress for work assignments. The CDE recommends at least one completed work product for each subject every two weeks.
For Work Product Evaluations records to be created, **a Supervising Teacher record must exist** on the signatories tab

On the **Work Product Evaluations** tab, select **Add Work Product Evaluation** button. A **Start Date** and **End Date** is required to begin the process of adding the courses that will be included for the evaluation period. Enter dates that match the timeframe of the evaluation period as identified by the district. For example, the evaluation period may take place every two weeks or monthly. Once dates have been entered, select the SAVE icon.

Add Agreement

Agreement	Signatories	**Work Product Evaluations**

Work Product Evaluations						Section 0 indicates Supervising teacher records	⊕ Add Work Product Evaluation

	Start Date	End Date	Hours	Days	Section	Teacher/ Course Title	Satisfactory Progress	Notes
💾 🗑	11/1/2021 📅	11/19/2021 📅	⬍	⬍	0 ▾		▾	

A record for each class based on **Course Attendance (CAR)** that falls within the evaluation date range will be inserted into the evaluation page. The first record (highlighted in blue) will be the master record for the Work Product Evaluation period. This is the record managed by the supervising teacher. All other records will be managed by the teacher of record for the class. With proper permissions, the teacher will be able to document the hours, days, student's progress and any notes for each evaluation period. The supervising teacher will indicate the ADA days for the evaluation period on the master record as well as the overall satisfactory progress for the evaluation period.

The ADA days is informational only and DOES NOT automatically get triggered into the Attendance table.

Edit Agreement

Agreement | Signatories | Work Product Evaluations

Work Product Evaluations

Section 0 indicates Supervising teacher records ⊕ Add Work Product Evaluation

	Start Date	End Date	Hours	Days	Section	Teacher/ Course Title	Satisfactory Progress	Notes
✏	11/15/2021	11/26/2021	50	0	0			
✏	11/15/2021	11/26/2021	25	10	1156	Velasquez/Spanish I	Yes	
✏	11/15/2021	11/26/2021	25	10	2008	Wallace/Leadership		
✏	11/15/2021	11/26/2021	0	0	3134	Smith, S./Phys Science,CP		

Work Product Evaluation Continued

Individual courses can be deleted if needed

Start dates can not be changed once added. If a date is added in error, the master record will need to be deleted, all subsequent course records will be deleted too, then the new evaluation records can be added again with corrected dates. Be cautious when deleting evaluation records. Records should not be deleted if data has already been populated.

Work Product Evaluations will appear on the Agreement home page and will display the master record for each evaluation period. Clicking on the down arrow or anywhere on the record will expand to display all courses for the evaluation period. The page will always default to only display the master record in each evaluation period when the page is loaded.

AERIESCON

From Student Data > Programs > Independent Study Management
The **Independent Study Management** page is designed to allow users the ability to manage Agreement information such as upload Signatures, digitally sign Agreements, and add or edit Work Product Evaluation records. The page can be accessed from a school or district.

For more information on Independent Study Management see:
https://support.aeries.com/support/solutions/articles/14000133521-independent-study-management

Agreements

Filters and Options

Filters
- ☐ Pending Signature(s)
- ☐ Where I am a Signatory

Limit Results By

☑ Status
- ☐ Draft   ☐ Pending   ☐ Cancelled Prior to Activation
- ☐ Activated   ☐ Revoked

☑ Sections
Select Section...

☑ Dates

Planned Start Date:	Planned End Date:
Actual Start Date:	Actual End Date:

✳ Values entered in Start Dates indicate a search for dates on or after the start date. Values entered in End Dates indicate a search for dates on or before the end date.

Apply Filters

Results

	ID	Name	Status	Planned Date	Actual Date	Work Product Detail	Signature Details
	99000001	Aadasian, Robert Bradly	Pending	11/01/2021 – 11/26/2021	11/01/2021 – 11/26/2021	Evaluation Periods: 1	0/3 Signatures
	89400001	Abbott, Alex James	Pending	11/01/2021 – 11/26/2021	11/01/2021 – 11/26/2021	Evaluation Periods: 2	0/4 Signatures

KEY TAKEAWAYS

- The State of CA requires that the reporting of Independent Study MUST be separate from regular attendance.
- Two absence codes must be set up in the Absence Code Table.
- All Day Code Field is what drives the ADA , if left blank- ADA will be generated regardless of Negative or Positive Att
- Signatures for IS Agreements cannot be collected until Agreement is set to Pending Status.
- Agreement will automatically be Activated once all partied have signed.
- Only signatories that have Aeries Portal Accounts can digitally sign agreement.

AERIESCON

H a v e   a   g r e a t   d a y !

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