2012

Oklahoma State
Department of Education

SCHOOL PARTNER DATA TOOL

Contents

FIGURES

I. Purpose

This document details the functional requirements for the software application School Partner Data Tool and associated data requirements that are part of the OSDE system. These requirements will be used to create interfaces, database structures, while also providing business rules and report formats.

II. Introduction

The OSDE gathers data from pubic educational facilities in the State of Oklahoma. Data is gathered at various levels, including student, educator, institution, and district. This data is used to support state, federal, and general public reporting requirements.

A. Business Case

Currently organizations that partner with multiple districts are requesting information from these districts that allows these organizations to identify educational programs that they can create to assist the students that participate in their organization to help them to better achieve their educational goals.

This requires the organizations to go to multiple districts to get information and then merge the data from various locations to develop a complete list of their student's educational status.

The purpose of this application is to allow school districts and sites the ability to identify students who would like to release their educational information to a Partnership Organization that they may be affiliated with.

This identification will be used to allow those Partnership Organizations to use OSDE data systems specifically the Early Warning Indicator system to log in and see their specific students that they are serving and identify additional ways that they can assist in meeting their educational goals.

B. Supporting Legislation

This application is not in response to federal or state legislation, but provides support in an overall OSDE strategy.

C. Glossary and Acronym's

Term	Definition
SDE Online	The States supported web based application for data collection and reporting.
SBOE	State Board of Education
OSDE	Oklahoma State Department of Education

III. Functional Requirements

A. Location

- SDE Online - the Wave
- Under the "District" tab called "Partnership Release"

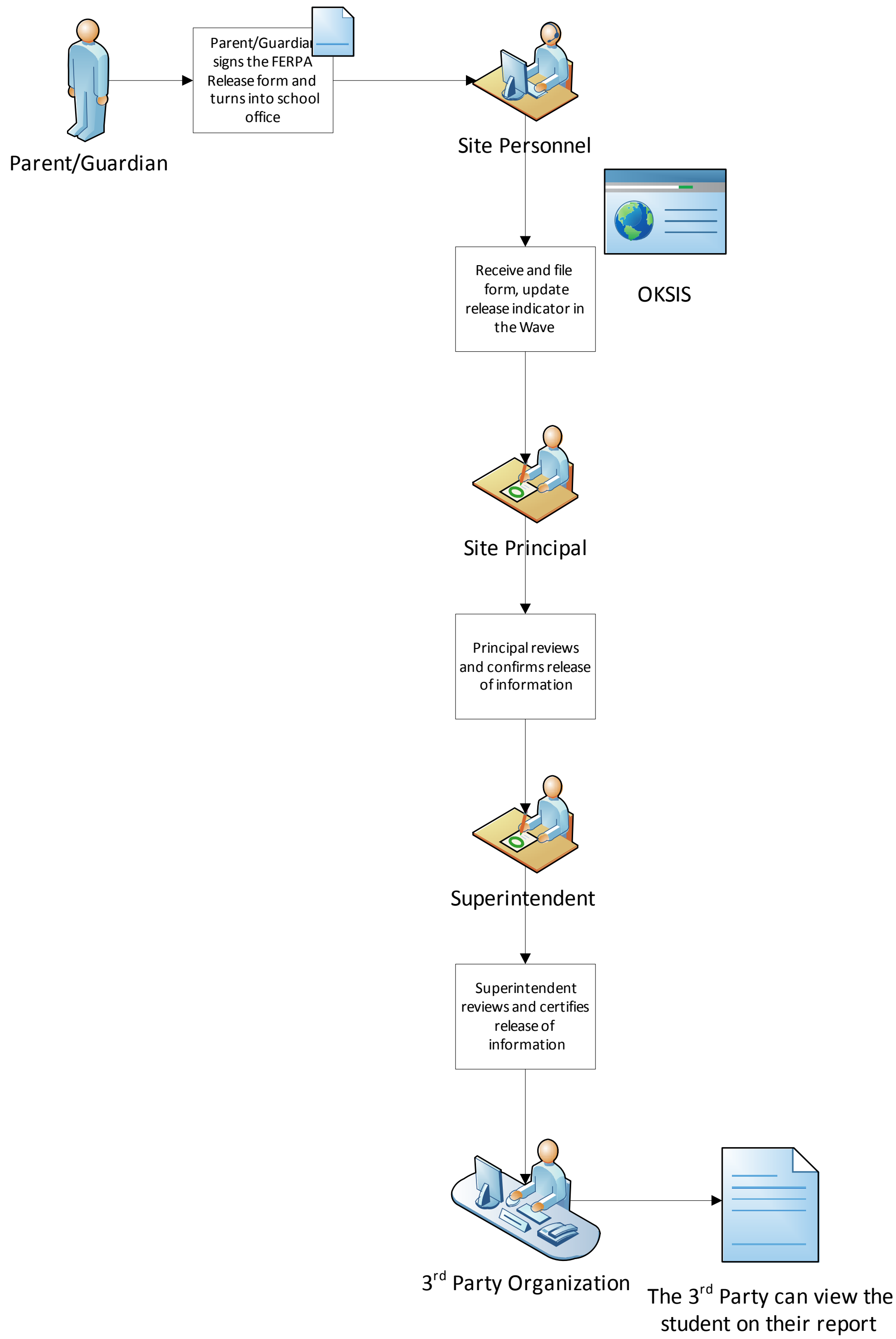
B. Business Rules

Business Rule Code	Rule Type	Business Case	Application
BR-001	Filter	The user can filter by a specific district, site, or student to apply a Partnership Release Indicator	Search functionality should filter
BR-002	Print	The list of students and their associated organization should be printable.	
BR-003	Revalidation	Each year a student must revalidate that they would they their information released	In the tool an inactive status would be applied on September 15th each year for those that do not have an active date within the last 2 months.
BR-004	Approval	The State Board will approve all Partnership Organizations prior to them being added to the list to have students information released	A Partner Organization will not be entered into the tool until they have been approved by the State Board.
BR-005	Approval	Once a student turns in their FERPA release waiver the approval of release of their information must be approved by both the School Principal and District Superintendent	The tool will allow principals to confirm and Superintendents to certify before any information is release for a specific student.
BR-006	Multiple Partnership Organizations	The process must work for having additional organizations identified at a later date	The tool will allow SDE to add approved organizations to the list which will then start the process for students being identified as participants.

C. User Roles

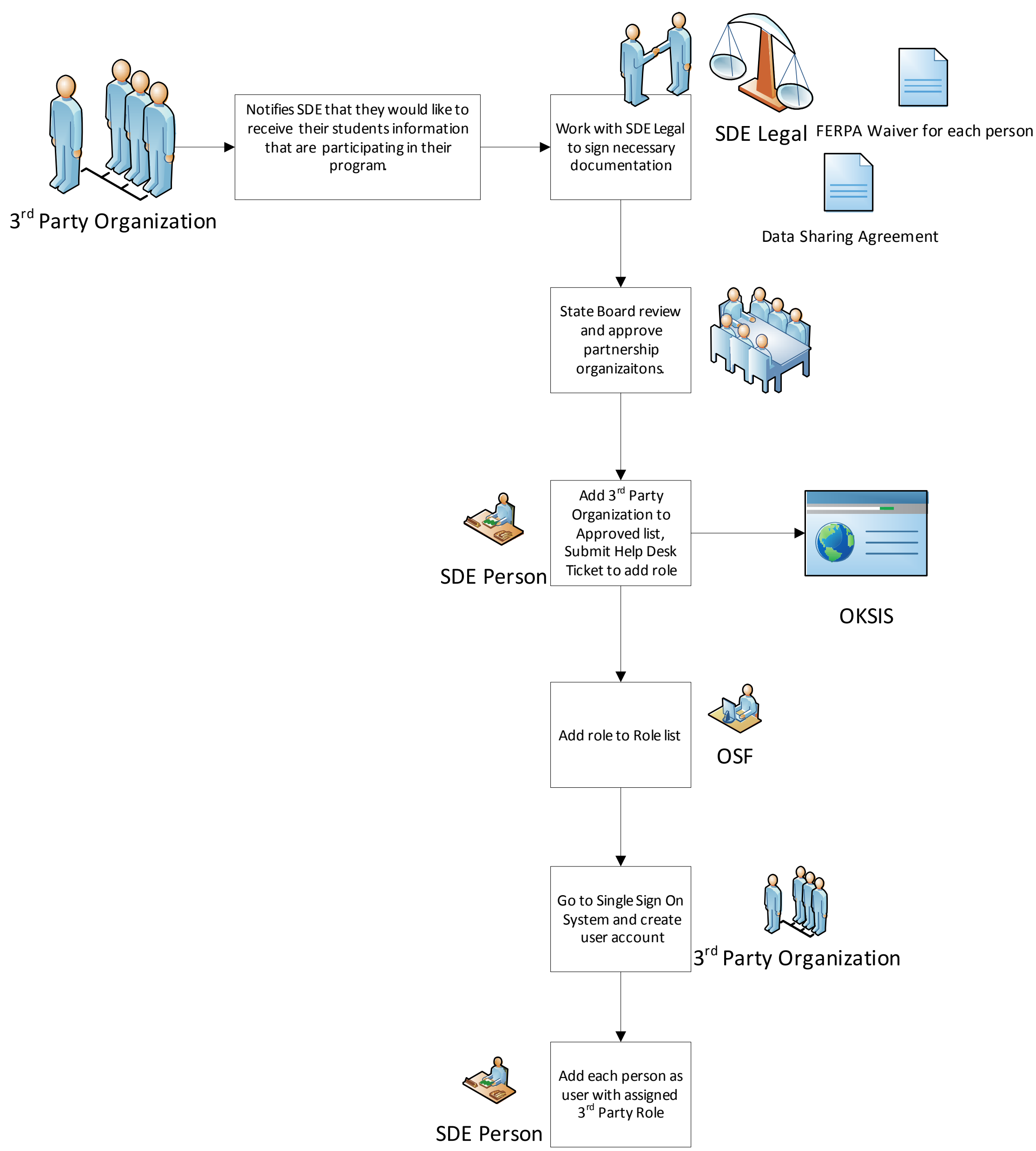
User Role Code	Role Description	Action/Capabilities
UR-001	Superintendent	• Activate a student's information to be released • Confirm and or Certify student to be released • Reporting
UR-002	Principal	• Activate a student's information to be released • Confirm a student to be released • Reporting
UR-003	Partnership Release State	• Reporting • Add new Partnership Organizations to the list • Approve users for Partnership roles • View Only for Student Lists etc.
UR-004	Various Partnership Organizations	• See a list of all of the students that they have access to see • See the EWI results for the students they have access to see
UR-005	Partnership Tool Release Management	• Activate a student's information to be released. • Reporting

D. Information Release Workflow



- The Parent/Guardian will sign the FERPA release form that authorizes the site to release their student's information to the Partnership Organization(s) that they specified.
- The form is then given to the site office for authorization and filing for historical purposes. Upon receiving the signed FERPA form the office staff should log into the Wave and update the student's active the students release indicator for the Partnership Organizations that they specified.
- The Site Principal must then sign into OKSIS and confirm the release of information to the Partnership Organization.
- The District Superintendent must then sign into the Wave and certify the release of information to the Partnership Organization.
- Once all previous steps are completed the Partnership Organization can sign into the Wave and see the EWI application for their specific students for which a FERPA release form was signed.

E. Setting up Partnership Access Workflow



- The Partnership Organization contacts SDE to express and interest in receiving educational information about the students that are participating in their program.

- The Partnership Organization is connected with the SDE legal department to have the appropriate data release agreement documentation completed, this must include a FERPA Waiver for each person that will need access to the information.
- The State Board would approve all Partnership Organizations.
- Once all legal paperwork is finalized an SDE team member can go to OKSIS to add a new Partnership Organization to the Approved list, they will also need to send a Help Desk ticket to request a new role to be added to the single sign on role manager.
- Once the role is added to the user manager the individual people who will need access to the system will need to go to the Single Sign-On Portal and set up their user accounts.
- The SDE team member can then associate each person with the Partnership role organization.

IV. Identifying Students

A. Site Selection

This screen allows the user to select the site for which they would like to review the Partnership Information release list for.

1. If a user is associated with a specific site/district then the drop-down boxes shall be automatically populated and not allow for modification.
2. If a user is a state user or associated with multiple sites then they would be allow to select from the drop-down lists.

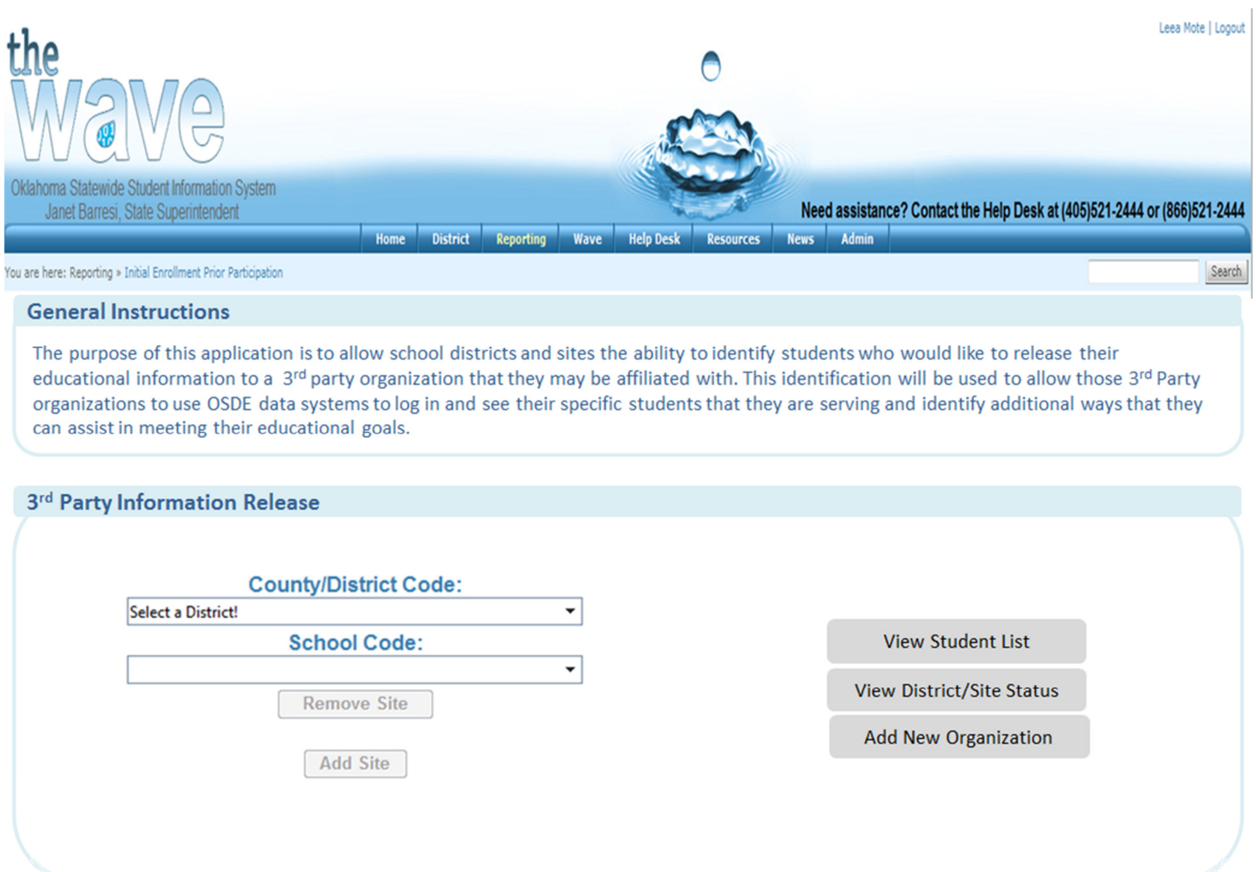


Figure 1 - Site Selection Screen

Name	Object	Validation
County/District Code	Drop-Down	List of the current county/districts in the state.
School Code	Drop-Down	Filtered based on the County/District selected, shows only those sites that are associated with a particular county/district.
View Student List	Control Button	Takes the user to the Student List screen to show a list of all students based on their criteria selected.
View District Site Status	Control Button	Takes the user to the District/Site Status Screen
Add New Organization	Control Button	Only visible to users with Admin or Partnership State roles. Takes user to Partnership List screen.

B. Student List

This screens filters based on the selection in the site selection screen.

1. The first nine columns are for the site and district to identify a particular student.
2. All columns after the identification columns are for Partnership Organizations. Each organization will have their own column.
3. A student can be associated none, one or many organizations.

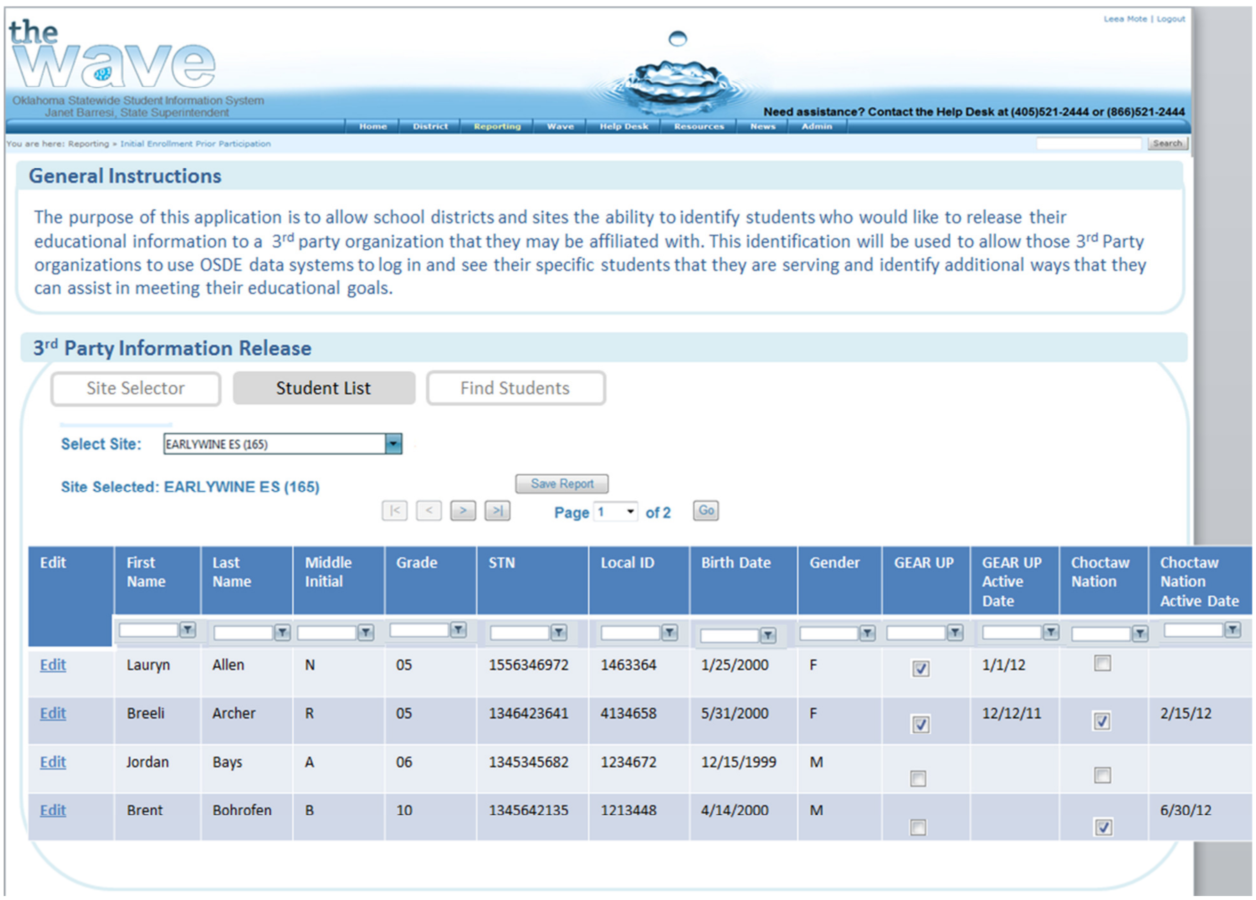


Figure 2 - Student List Screen

Name	Object	Validation
Edit	Control	Allow user to select and edit the checkbox entries
First Name	Column Header	The first name of the student
Last name	Column Header	The last name of the student
Middle Initial	Column Header	The Middle Initial of the student

Grade	Column Header	The currently enrolled grade of the student
STN	Column Header	The Student Testing Number of the student
Local ID	Column Header	The Local Identifier for the student
Birthdate	Column Header	The date of birth for the student
Gender	Column Header	The sex of the student
Partnership Organization	Check-box	Allows the user to select the checkbox to allow release of a particular students information
Active Date	Column Header	The date which the release was activated for the specified Partnership Organization
Save Report	Control	Allows the user to save any changes to the release authorizations. Once the Save button is selected an email notification will be sent to the Principal that the form is ready to be reconfirmed.
Site Selector	Control	Allows the user to go back to the site selector screen.
Find Student	Control	Allows the user to find a student that is not on their list, due to validation errors, ownership errors, or other data cleaning errors.

C. Find Student

The “Find Students” button will take you to a screen that lists students and any possible errors or conflicts their data contains. Students that do not appear on the Student List will either appear on the Find Students page or *the Wave* has not received a complete record on that student from your Student Information System. There are three types of issues that require intervention from a district user to remove a student from the Find Students screen.

- Validation Issue – Students with “Validation Issue” as the Issue Type can be found at the Data Validation Wizard located under the District tab of the Web site. Users with access to the Data Validation Wizard can view the error or warning for inaccurate or missing data and will need to correct the issue in their Student Information System located at their district. Once the data has been corrected at the district, the Student Information System will send a message to *the Wave*. When the message is received, the Data Validation Wizard will be cleared if the data is now correct and the student will be removed from the “Find Students” page. The student will then appear on the Student List the following day.
    - The errors that should be considered for this type of issue are: First Name Invalid or Not Provided, Middle Name Invalid or Not Provided, Last Name Invalid or Not Provided, Date of Birth Invalid or Not Provided, Gender Invalid or Not Provided, Race Invalid or Not Provided, Ethnicity Invalid or Not Provided.
- STN Issue – The students listed with “STN Issue” as the Issue Type will appear in the STN Wizard which is located under the District tab of the Web site. Users with access to the STN Wizard will view the student and possible matches to the student and will decide if the student is a match

or if the student has never had a statewide student testing number assigned. After clearing the student from the STN Wizard, they will appear on the Student List the following day.

- Ownership Issue – Students listed with "Ownership Issue" as the Issue Type will appear in the District Ownership Wizard located under the District tab of the Web site. Students appear at this wizard because the enrollment received overlaps by more than one day with another district's enrollment record. To resolve these issues, a district user at one or both districts listed will have to modify their entry/exit dates in their Student Information System to accurately reflect the student's mobility from one district to the other. When the correction is made, a message will be sent by the Student Information System to *the Wave*. If the dates no longer conflict, the student will be removed from the District Ownership Wizard and will appear on the Student List the following day.

If a user has access to the Data Validation Wizard, STN Wizard or District Ownership Wizard, the "Find Student" link to the left of the student listed will take a user directly to the appropriate module to view the issue. If the user does not have access, a screen will appear denying access to that particular Wizard.

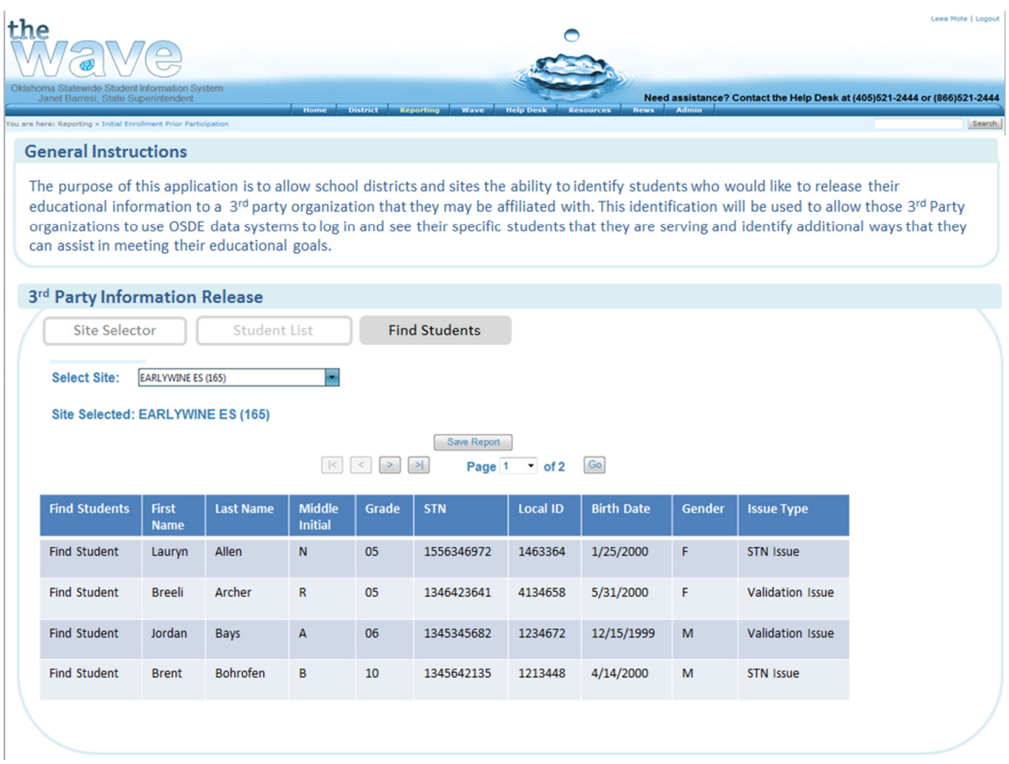


Figure 3 - Find Student Screen

Name	Object	Validation
Find Student	Control	Will take the user to the STN Wizard if Issue Type = STN Issue, will take the user to the Validation Wizard is the Issue Type = Validation Issue, will take the user to the Ownership Wizard is the Issue Type = Ownership Issue
Issue Type	Column Header	Indicates the type of issue options: STN Issue, Validation Issue, Ownership Issue
Site Selector	Control	Allows the user to go back to the site selector screen.
Student List	Control	Allows user to go back to the student list screen.

D. Principal Confirm Screen

Once someone from the site updates a release indicator a notification is sent to the Site Principal to let them know that the report needs to be reconfirmed.

On September 15th of each year all indicators should be marked inactive so that the principal has to reconfirm all students whose active dates are prior to July 15th of that year. The checkmarks and active dates should still be visible allowing the principal to only reconfirm the data.

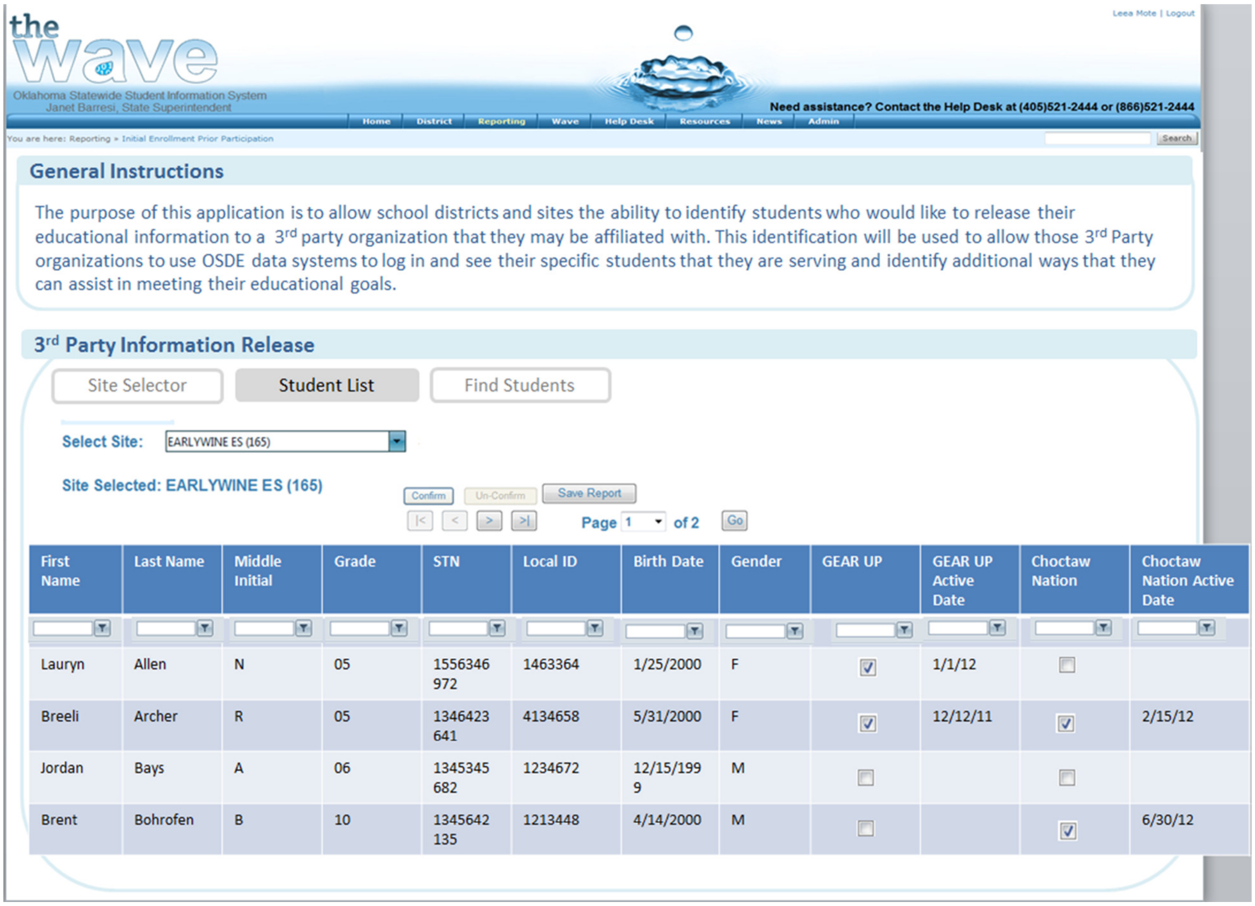


Figure 4 - Principal Confirm Screen

Name	Object	Validation
Confirm	Control	Enabled only for the site principal and district superintendent , will change status to confirmed
Un-Confirm	Control	Enabled only for the site principal and district superintendent, and if the status = Confirmed, once selected will change status to In Progress.
Site Selector	Control	Allows the user to go back to the site selector screen.
Student List	Control	Allows user to go back to the student list screen.

E. District/Site Status Screen

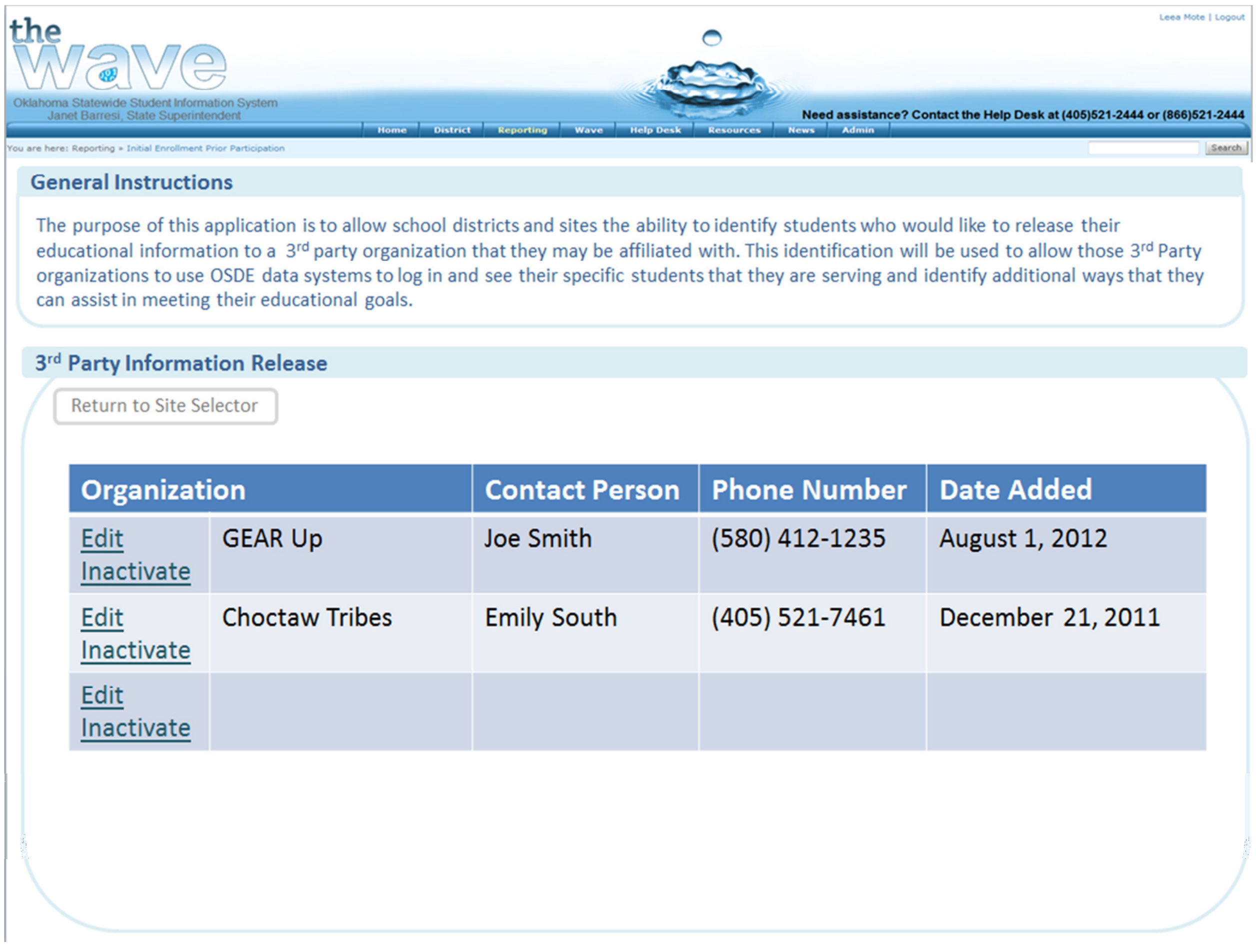
The district/site status screen can be viewable by any site or district role, however only the Certify button would only be visible by the District Superintendent.

Figure 5 - District/Site Status Screen

Name	Object	Validation
Certify	Control	Enabled only for the district superintendent, and only once all site status' are Confirmed. Once selected changes the status to Certified.
Decertify	Control	Enabled only for the district superintendent, and if the status = Certified, once selected will change status to In Progress and only for that certain site.
Return to Site Selector	Control	Allows the user to go back to the site selector screen.

F. Partnership Organization Management Screen

Only users with Admin or Partnership Organization State roles will be able to view this screen. This screen will allow a user to manage the student level access to the 3rd parties that SDE has a legal agreement with.



Name	Object	Validation
Organization	Column Header	The name of the Partnership Organization, this will be the name that is displayed to the sites/districts when they are authorizing release of information.
Contact Person	Column Header	The name of the contact person at the Partnership Organization that should be contacted with any issues or concerns.
Phone Number	Column Header	The phone number of the contact person specified. Format: (###)-###-###
Date Added	Column Header	The date the Partnership Organization was added to the list. This should be automatically populated by the application.
Edit	Control	Allows user to Edit a record already in the table.
Inactivate	Control	Allows the user to inactivate the organization from the approved list. If selected will not release any information to the third party.

Add Organization	Control	Allows the user to add a new record to the table.
Return to Site Selector	Control	Allows the user to go back to the site selector screen.

G. EWI Access

The 3rd party organizations that are added to the management screen will be given access only to those students to which their checkbox are selected. Within the existing EWI screens we will add a selector and fill it in with the organizations listed in the management screen.