ONLINE REGISTRATION & ANNUAL INFORMATION UPDATE

User Guide for School Secretaries

Updated 8/9/23

Contents

Hello! This guide will explain your responsibilities in the online registration and Annual Information Update processes as well as cover some of the new things happening in the Data/Registration Department this year such as:

- Improved process for checking Contacts
- Updated contacts from last year will further improve the approval of contacts this year
- Process for improving the collection of Annual Information Update data for new registrants.

Please continue reading for detailed information regarding our Online Registration process along with some additional new information. Information that has been updated from last year is highlighted in yellow.

As always, if you have any questions, please contact me or my secretary, Heather Sullivan, at Ext. 6321.

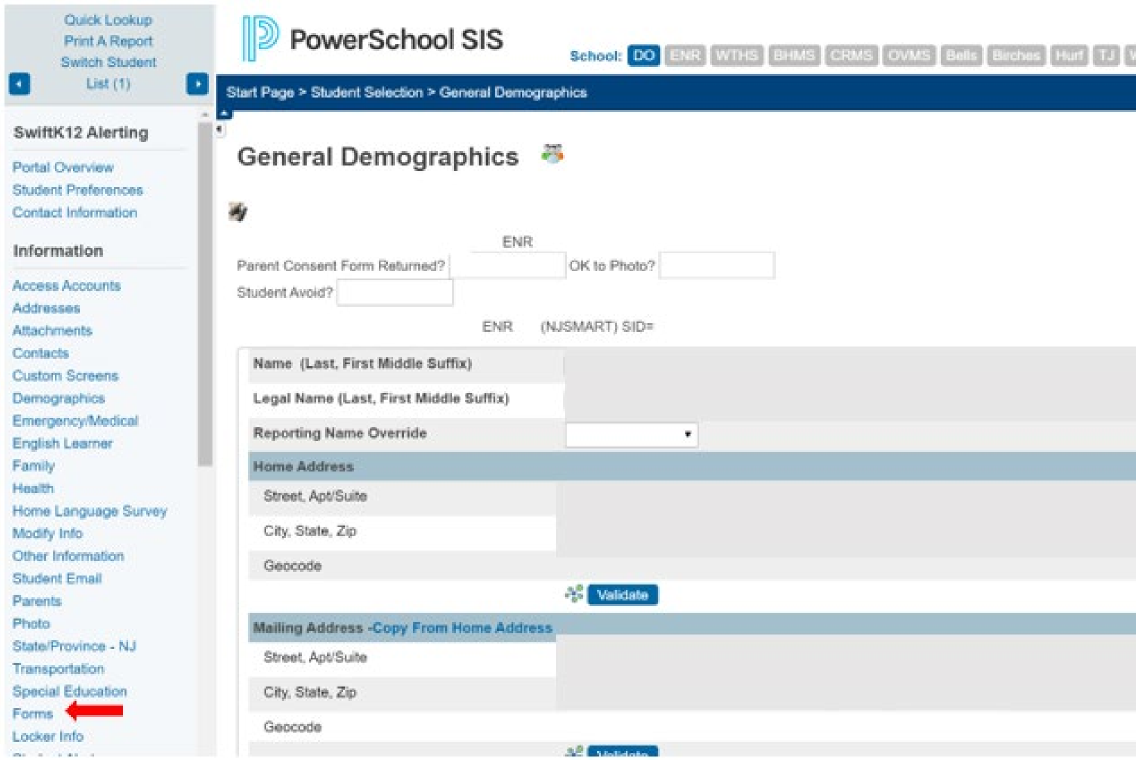
Thank you,

Katherine Carey

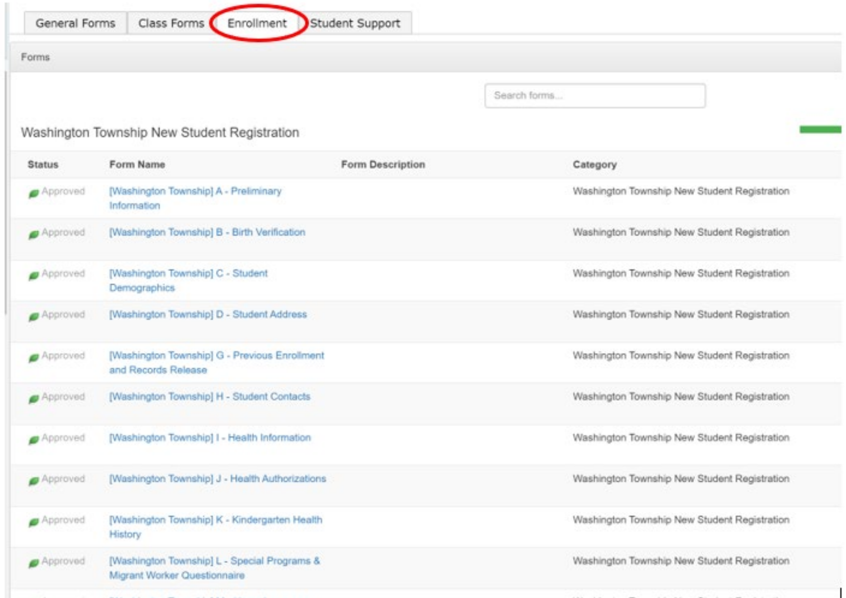
Accessing Registration Forms

Student registration forms will be housed in PowerSchool. To access a student's forms, follow the steps below:

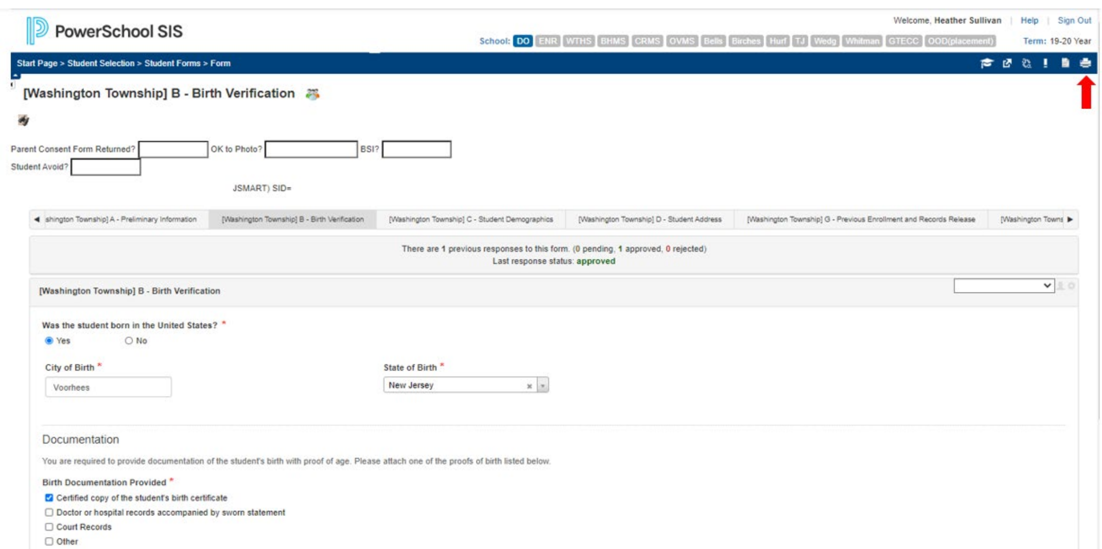
1. Find the student in PowerSchool to access their profile.
2. Click on "**FORMS**" under the Information tab (in the left column).



3. Once on the Student Forms page, click on the "**ENROLLMENT**" tab. The forms can be found here.



4. To view a particular form, simply click on the form name and the form will load. **DO NOT EDIT OR CHANGE ANY INFORMATION ON THE FORMS! If you need to edit or add information, this should be done in the SIS, NOT on the Enrollment forms.**
5. To print a form, scroll up to the top of the form and click on the printer icon in the upper, right-hand corner.



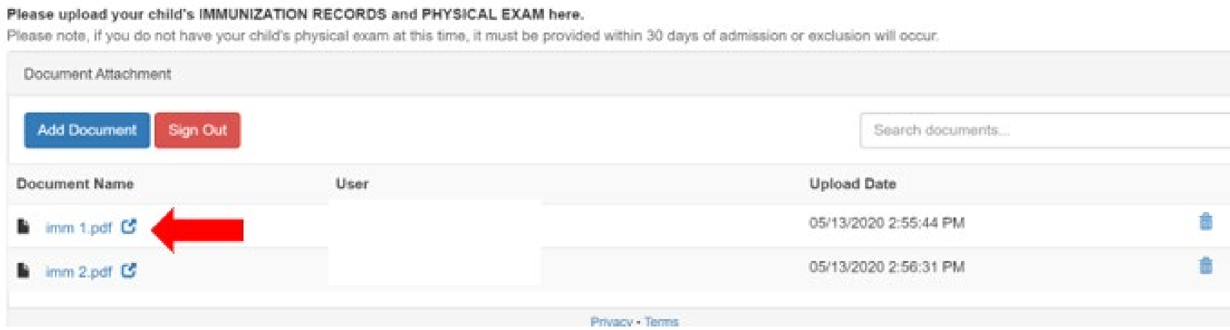
Viewing and Downloading an Attached Document

Documents such as birth certificates, legal documentation, immunization records, physical and dental examinations are uploaded to a form by the student's parent/guardian during the registration process. Documents are uploaded to specific forms. Below is a list of forms you may need to view and where to find them:

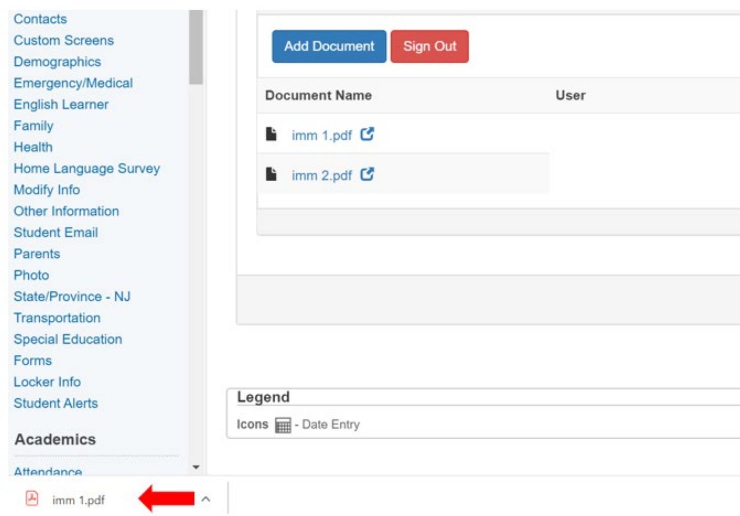
Document	**Attached to Form…**
Parent's Photo ID	A – Preliminary Information
Birth Certificate	B - Birth Verification & Demographics
Photo of Child	B - Birth Verification & Demographics
Custody Papers/Restraining Orders/Legal Documents	B2 – Legal Documentation
Proof of Residency	C– Student Address
Immunization Record	H – Health Information
Physical (if provided)	H – Health Information
Dental Form (if provided)	H – Health Information
Copy of current IEP	F – Previous Enrollment and Records

1. To view an attachment, you will need to be logged in to the Document Attachment tool. There is a separate username and password that you will need to create. (You will receive an email from PowerSchool once you are granted access. The link to create your username and password will be in this email). If you need to gain access to the attachments, contact Heather Sullivan at ext. 6321. Click on the form where the document is attached (see chart above).

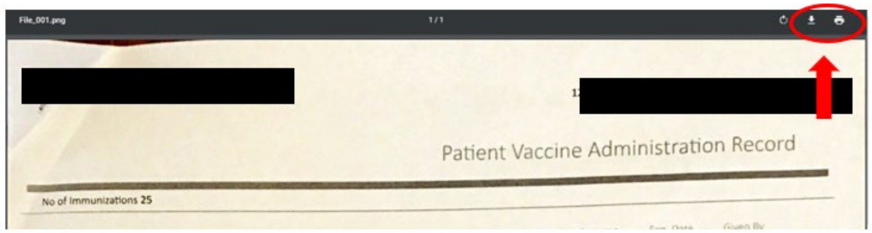
2. Scroll down to the bottom of the page. You will see the "Document Attachment" box. To view the document, simply click on the document name.



3. The document will download and appear in a box on the bottom of your screen. Click the box to view the document.



4. Once the document loads, you can view, save or print the document. To print or download the document, hover your mouse over the top of the document. A black bar will appear, and you will see 3 icons in the upper, right-hand corner. To download and save the document, click on the arrow. To print, click the printer icon.



**Note: DO NOT DELETE ANY DOCUMENTS FROM THE FORMS!

New Student Log (Shared File)

We created a shared Excel file that contains all new registrants. This file has already been shared with you. If you do not have access to this document, please contact the Registration Office. This document contains the following information:

- Name
- Student ID
- School
- Date of Birth
- Grade
- IEP/504 (yes or no)

You will no longer receive paper packets from the Registration office. Instead, when a new student is approved in the pre-registration portal, their name is added to the "District" tab or the "Kindergarten" tab. The parent will then receive an email and be required to set up their PowerSchool account. They will then log in to their PowerSchool account and complete the registration forms and upload the required documents. Once the parent/guardian completes the registration forms and they are approved, the Registration office will transfer the student from the Enrollment school to the appropriate school (or holding school) in PowerSchool. Once the student is transferred, their information in the New Student Log will be moved from the "District" tab to the appropriate school tab. Registration will email the principal's secretary (elementary) or counseling secretary (secondary) when a new student has been enrolled. You will check the tab for your school to view more information about the new enrollments. You can check this file as often as you'd like (we recommend checking it daily) to keep track of your school's new students.

You will have "view only" access to the file. To view the new registrants, click on the tab for your school. The schools do not need to add or edit information in this file. This is for informational purposes only. If, for any reason, information in the file needs to be changed, please contact the Registration office.

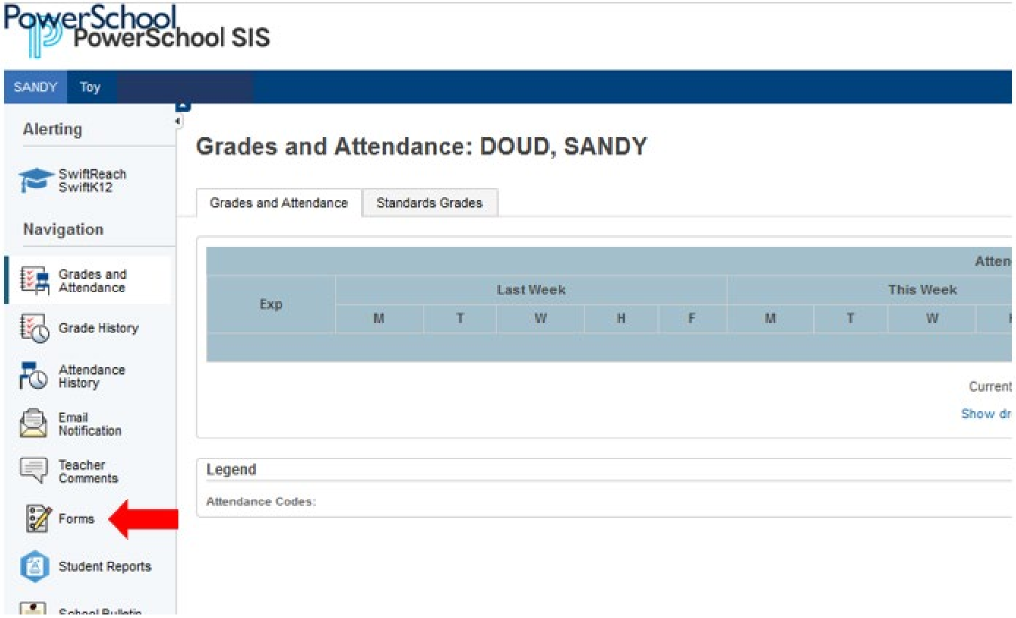
Data Verification for New Students

Please check the New Student Log regularly for new students. When you see that a new student is registered, please check the following:

- Form B2 – Legal Documentation - If there are custody papers/restraining orders/legal documents,
    - make sure they are uploaded as an attachment in PowerSchool – not only attached to the form!
    - make sure there is a guardian alert with custody information, your first initial, last name and the date (H. Sullivan 8-9-23). Be sure to include the following:
        - Who has custody and type of custody?
        - Is there any person who cannot pick-up/have contact with the child?
        - Are there any expiration dates?
        - *Note: From B2 will only appear for New Students who registered after the Annual Information Update has been complete. Otherwise, all legal documentation will be in the Annual Information Update form.*
- Form F – Previous Enrollment and Records Release
    - Check here to see if transcripts, records, and/or any educational documents are attached.
    - If the student is transferring from another school and did not provide transcripts/records, contact the school for records. We will provide a form letter that can be sent to the schools.
- Form G – Student Contacts
    - Make sure parent contact info is in the contact table. This includes phone number, address, and email.
    - Make sure there are 3 emergency contacts and there is at least a phone number for each contact.
    - Verify that "Relationship" and permissions are complete for each contact.

Annual Information Update

We use our online registration system to have parents/guardians complete the Annual Information Update forms online. These forms will replace the paper emergency card that is sent home with the students at the beginning of every year. To access the forms, the parents will log into their PowerSchool Parent account, select FORMS from the menu on the left-hand side and then select the first form to access the forms.



We will be providing the parents with the following forms:

- Annual Information Update (demographics, residency, legal documents)
- Change of Address (if applicable)
- Contacts
- EDIT Contacts(if applicable)
- Health Information
- Information, Permissions, and Agreements (media release, free/reduced lunch info, parent handbook)
- School Counseling Form
- Technology

While completing the Annual Information Update, parents/guardians will also be provided with links to the current District Parent Information (handbook, calendars, FERPA, Policies, etc.) and Sign-Off form. These links are found on the Information, Permissions, and Agreements form.

Also included in the Annual Information Update are the following:

- Media Release - The response will be mapped to a PowerSchool field and the information will automatically populate on the student's PowerSchool profile.
- Home Technology Information - We will now be collecting information about students' home technology and internet access availability. This information will be mapped to the "Other Information" page in PowerSchool.

<u>Forms for Use Throughout the School Year</u>

We added 3 new electronic forms for parents to use throughout the year. These forms are disabled during the Annual Information Update but will be enabled once the Annual Information Update forms are "turned off".

- Change of Address – Parents can now complete a change of address form online. The form will be published to their Parent PowerSchool Unified Classroom account for use at any time throughout the school year. The Registration office will receive a notification when the form is submitted and reach out to the parent/guardian regarding the change.
- Email, Voice and Text Notifications Update – Parents can update their Swift K12 contact information at any time throughout the school year by completing and submitting this form. The form will be published to parent accounts for use any time throughout the school year.
- Update Contact Information – This form will allow parents/guardians to update both their contact information and the emergency contact information. The form will be published to parent accounts for use any time throughout the school year. A notification will be sent to the building secretary if this form is completed during the school year.

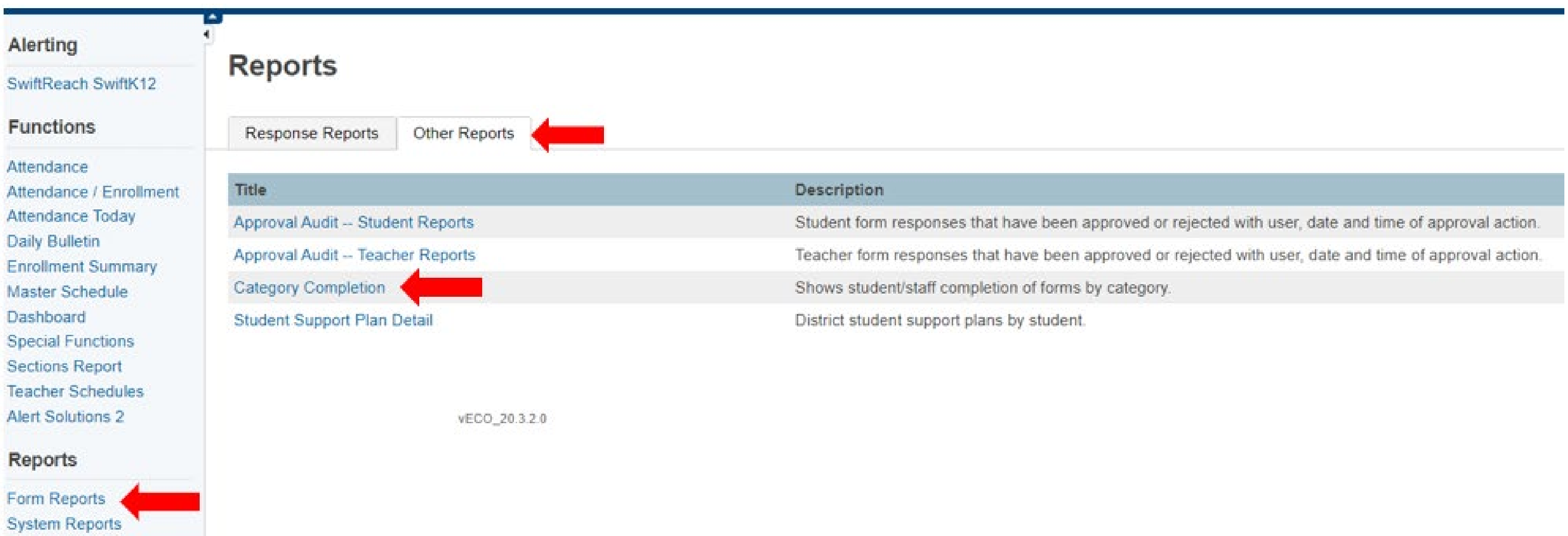
Accessing Annual Information Update Forms in SIS (PowerSchool)

The first step in this process is running a Category Completion Report. This report will show the progress of completion for each student. If all the forms are complete, the Percent Complete column will show at 100%. These students' forms are ready to be reviewed. If parents started completing the forms but did not finish, the report will show the percentage that is complete and which forms have been submitted.

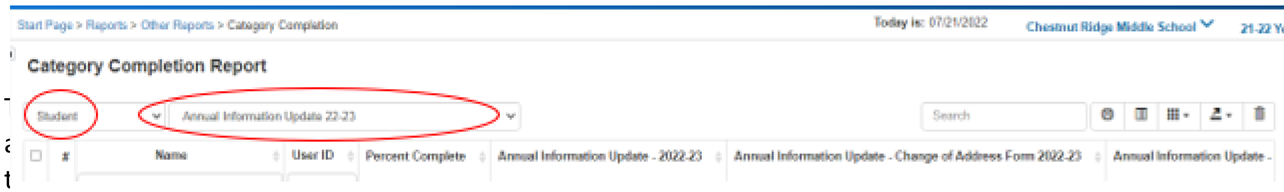
How to run a Category Completion Report

To run a completion report:

- Begin at the PowerSchool start page. Click FORM REPORTS (under Reports) located in the menu on the left-hand side.
- Choose the OTHER REPORTS tab and then click CATEGORY COMPLETION.



- Next, you will choose STUDENT from the 1st drop-down box and then choose the category from the 2nd drop-down box. (Ex. Annual Information Update 2023-24)



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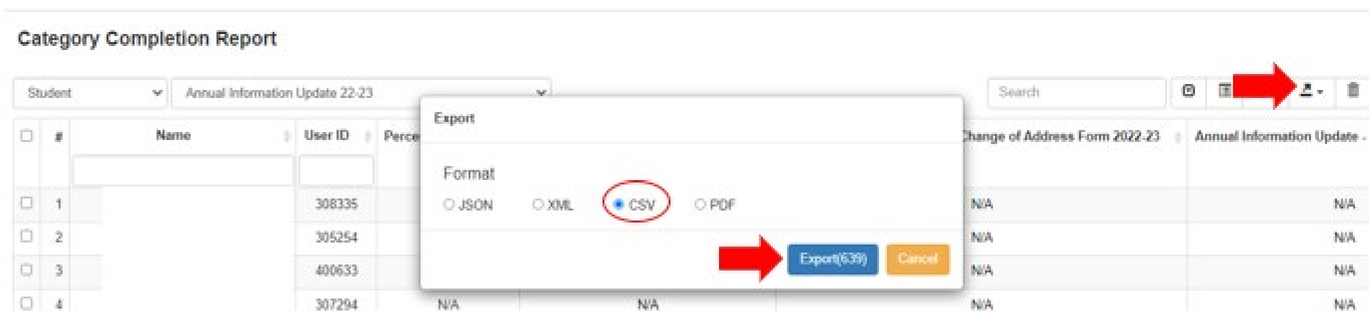
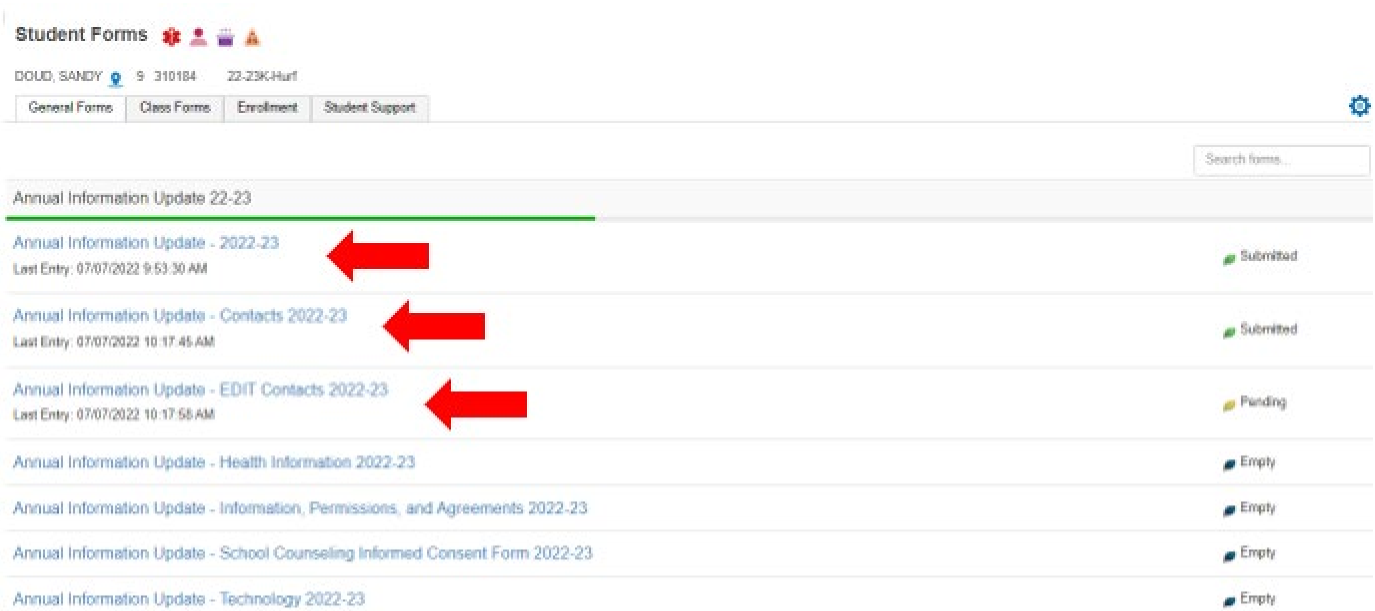
- Your report information will now be displayed on the screen. You can export the data and save it to your desktop or OneDrive. We suggest exporting the data into an Excel spreadsheet so that you can sort and filter the information for easy manageability. To export the data to Excel, click on the arrow to the far right of the page. Then choose **Export** -> **CSV -> Export** to export as an Excel document. *Note: You can choose to export the file as a PDF, if you prefer, but you will not be able to sort or filter the information. To export in a different format such as PDF, simply choose that option instead of CSV.*



It will be each school's responsibility to review and approve, as necessary, the Annual Information Update forms. Below is an explanation of each form and a check list of what you will be looking for when approving the forms.

To begin approving/reviewing the forms:

- Choose a student from your completion report that is 100% complete and select that student in PowerSchool. (It is helpful to use the MultiSelect feature in PowerSchool when reviewing completed forms.)
- Choose FORMS (under Information) from the menu on the left-hand side. You will only need to verify information on 2-3 forms. Click on Annual Information Update (current year) to view the first form.



- First, you will check information on the Annual Information Update form. Click on the form and check the following:
  - <u>Student Demographics</u>: Verify that the race/ethnicity information is complete. If "Multiracial" is selected, make sure that there are 2 races selected. If there are not 2 races selected, please contact the parent to verify and correct the information. This information is important and needed for state reporting.

- Custody/Legal Information: Has there been any change in custody? Is there a restraining order? If so, contact parent, if necessary, to obtain additional information and custody information. Upload custody paperwork as an attachment in PowerSchool and add a Guardian Alert with the following information:
  - Who has custody and type of custody?
  - Is there any person who cannot pick-up/have contact with the child
  - Do any of the legal documents have expiration dates
  - Your first initial, last name, and date (H. Sullivan 7-7-22)
- Current Address: If a parent indicates a change of address, change will be processed by the Registration Office. If the parent indicates that they did not move but their address was recorded incorrectly, you must correct the information in PowerSchool on **BOTH** the address screen and contacts screen.

New Contacts Procedure

In hopes of reducing the amount of time it takes to approve the Contacts Form, we created a new process for the Contacts Update Form. Parents will receive a form that shows the contact information we currently have on file. This form is "view only". There is a question on the form that asks if the information is correct. If the data needs to be updated, the parent will answer "NO" on the form. This will generate a 2nd form titled "Annual Information Update – EDIT Contacts (current year)". The parents will be able to edit the contact information on this form as they have done in the past.

How do these changes affect your approval process?

- If the parent/guardian indicates that all the information is correct, you simply need to review the information that is on file to be sure that the required information is there and CLEAN!
  - See guidelines below for required information.
  - If the above is complete, no action is needed.
- If the parent/guardian indicates that the information needs to be edited, a second form will populate. You will follow the same procedure on this form that you have in the past.
  - Review the changes that are being made.
  - See guidelines below for required information.
  - Once all information has been reviewed, approve the form. (Password 5678)
- Enter your first initial, last name and date in the "Contacts Verified" field. (ex. H. Sullivan 7-20-22)

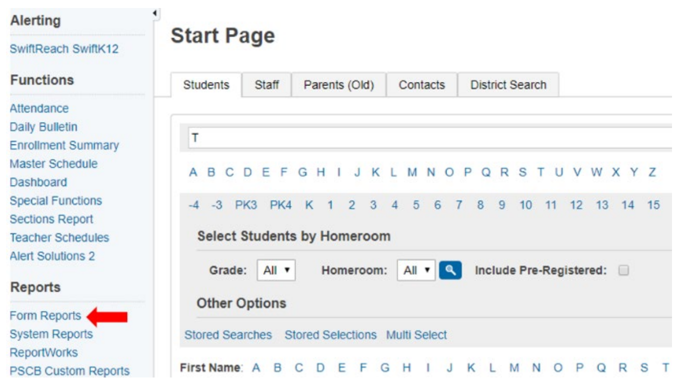
Annual Information Update-Contact Information

- Confirm all parent contact info is in the contact table. This includes phone number, address, and email.
- Confirm there are 3 emergency contacts and there is at least a phone number for each contact.
- Verify that "Relationship" and all permissions are complete for each contact.
- Make sure the contacts are in proper order (parents/guardians, emergency contact 1, 2 and 3, and guardian email).
- *As stated above, only the EDIT Contacts form will require approval. The information updated on this form will not go into PowerSchool until the form is approved.
- If the form was submitted accurately and no changes need to be made, click the "APPROVE" button at the bottom of the screen. The system will ask for a password. The password is 5678.
- If the form requires revision, click the "Reject" button at the bottom of the screen. The system will ask for a password. The password is 5678. When you obtain the accurate information make the revisions on the form and click "Submit". The form is now complete and will transfer the data to the SIS. There is no additional approval.
- If a parent edits, adds, or deletes contact information, it will be noted on their card:
  - Updated-An orange "Updated" box will appear next to the contact's name.
  - Deleted-A red "Deleted" box will appear next to the contact's name.
  - New-A green "New" box will appear next to the contact's name.

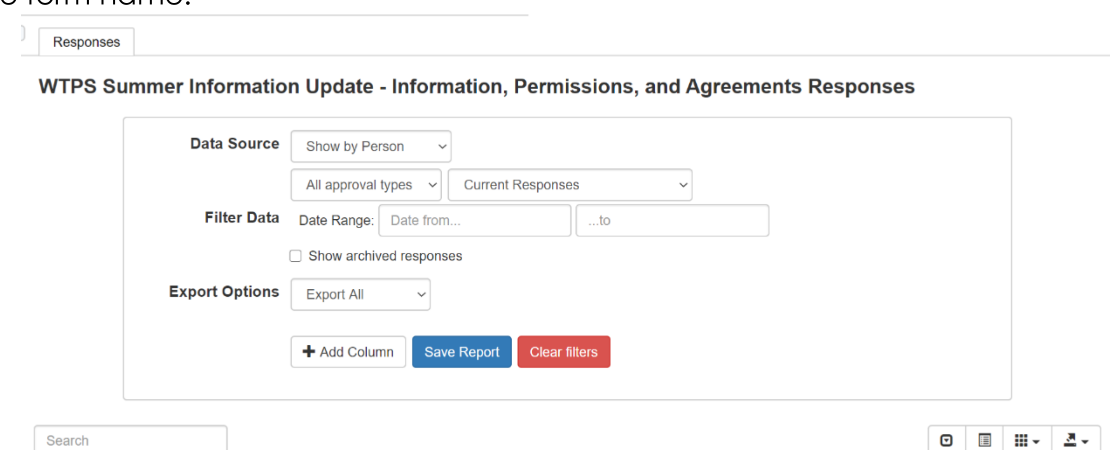
How to Run a Response Report

Another useful report is the Response Report. A Response Report can provide output of form response data. The report has filters that allow you to customize the data view to suit a variety of use cases. You can run a response report to gather data from any of the forms. For example, you can run a report on the Information, Permissions and Agreement Response Form to obtain an Excel spreadsheet showing all students and their responses to the questions on the form such as Media Release response, whether or not a family has internet access or a technology device, which families indicated there are custody/legal papers, allergy information, etc.
Below are step-by-step instructions for completing a Response Report. Remember, you can customize the report to show specific information depending on your needs.

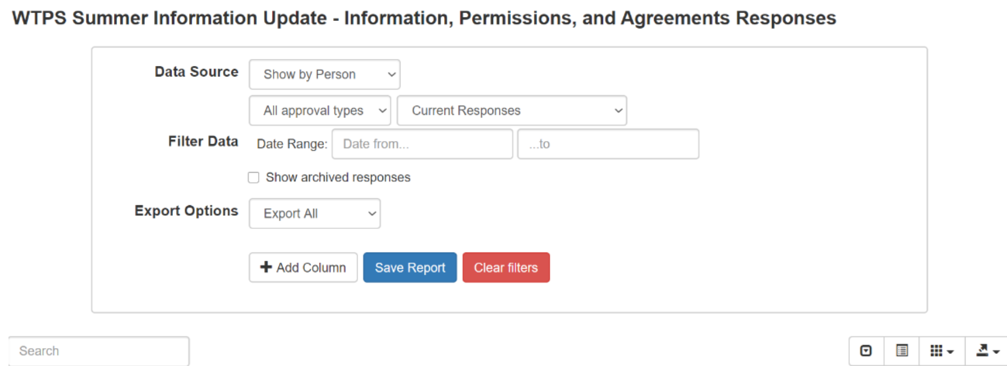
1. From the PowerSchool start page, click on "**FORM REPORTS**" under the Reports tab in the left-hand column.



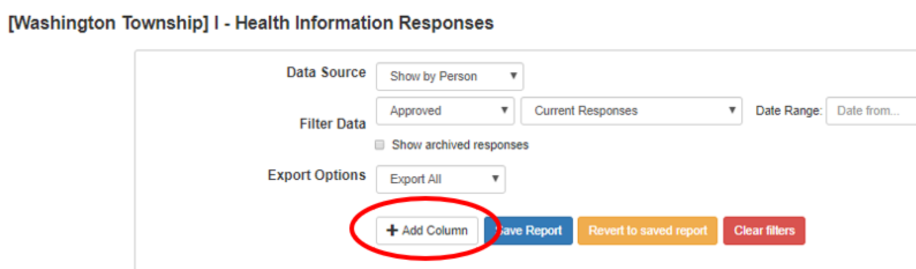
2. The next screen will show the names of the forms that you can choose for a Response Report. Scroll down to the form you would like to use for your report (for example, choose WTPS Annual Information Update-Information, Permissions, and Agreements Responses to run a report to see whether or not students have use of technology at home). Click on the form name.



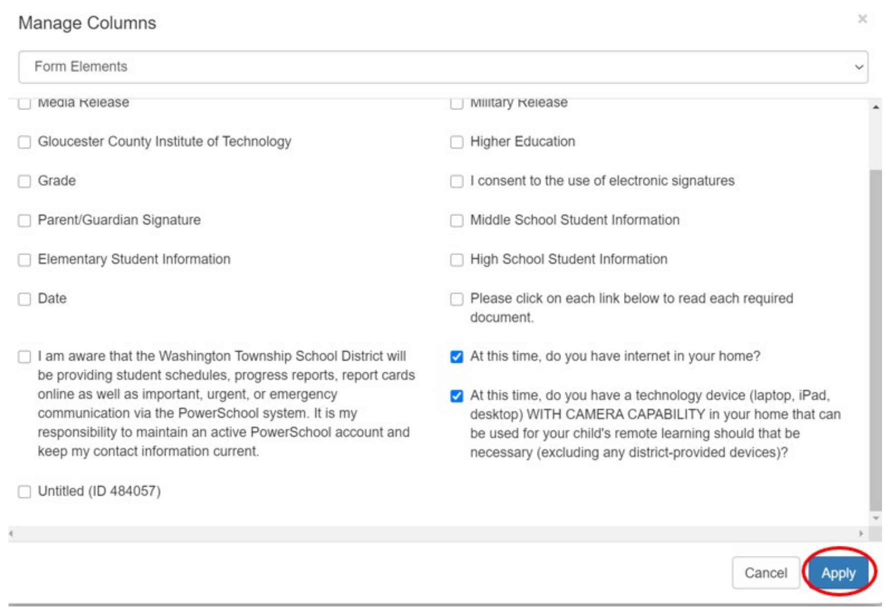
3. Next, you will apply the filters for the report data. For a standard report, you will apply the following filters: (you can change these options to fit your needs)
   Data Source: Show by Person, All approval types, Current Responses
   Filter Data: Date Range-Leave blank unless you are looking for a specific time frame
   Export Options: Export All



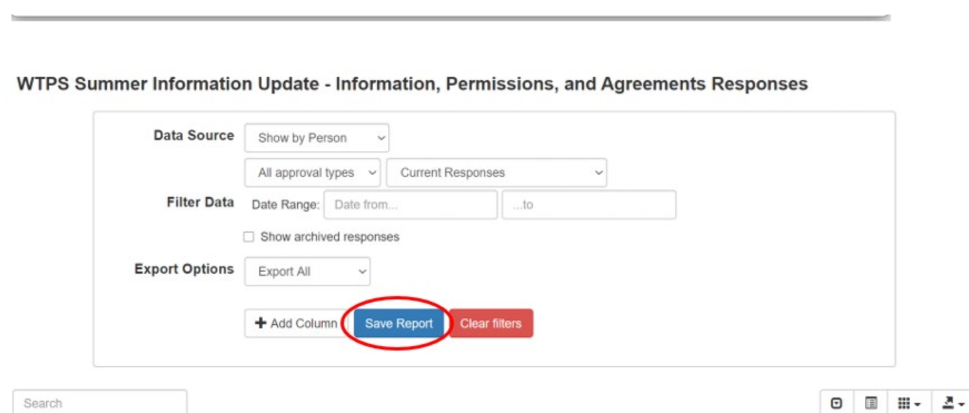
4. You will need to add columns to your report by choosing the information you want in the report. To do that, click on "**ADD COLUMN**".



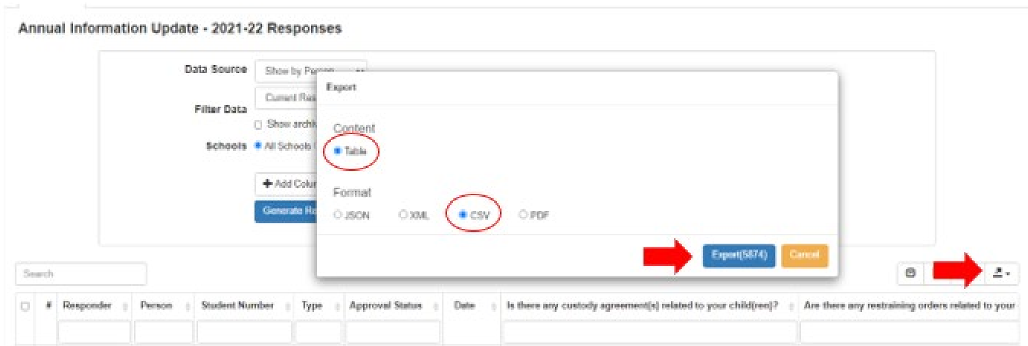
5. You will see a pop-up box titled "Manage Columns." The information in this box will be different for each form as it contains every question specific to that form (for example, I am using Form I – Health Information Responses). Here you will check the information you want in your report. You can choose to only have one field on your report, multiple fields, or you can choose to have all the fields on your report. You choose what information you want to see. Be sure to scroll all the way down to see all the options. Once you selected your desired fields, click "APPLY."



6. If you would like to save these options to avoid having to click them again in the future, click on "**SAVE REPORT**". The next time you go to run the same report, the filters will be saved, and you will not have to enter the information again.

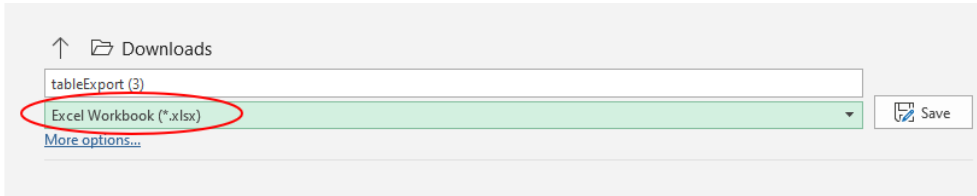


7. Your report information will now be displayed on the screen. You can export the data and save it to your desktop or OneDrive. We suggest exporting the data into an Excel spreadsheet so that you can sort and filter the information for easy manageability. To export the data to Excel, click on the arrow to the far right of the page. Then choose **Table** -> **CSV->Export** to export as an Excel document. *Note: You can choose to export the file as a PDF, if you prefer, but you will not be able to sort or filter the information. To export in a different format such as PDF, simply choose that option instead of CSV.*



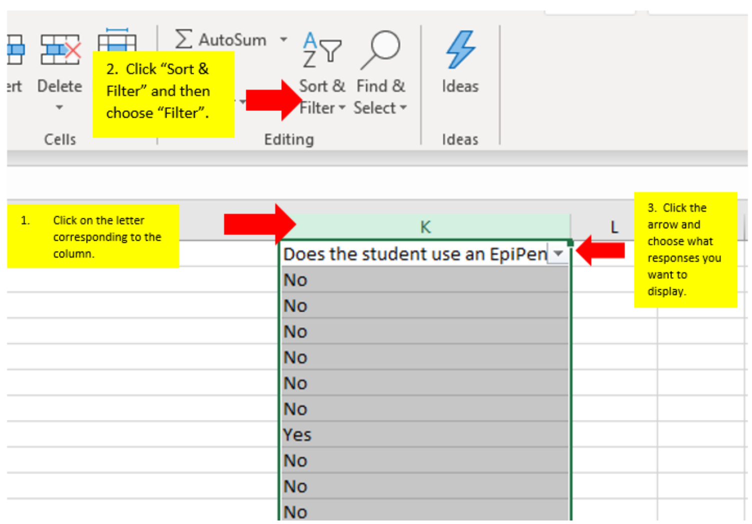
8. The report will show up on the bottom left of your screen. Click on the box to view the report.

9. Once your report opens, you can sort and filter as needed. Save your document to your desktop or OneDrive. When saving, be sure to change the file type from a CSV file to an Excel Workbook. Otherwise, any changes you make to your document will not be saved.



A few Excel tips to make things a little simpler:

- The columns are formatted to a certain width, and you cannot easily read the information in the columns. To adjust the column width automatically, highlight your entire spreadsheet by double clicking the box in the upper, left-hand corner. Then, position your mouse on the vertical line between the A and B columns until it looks like a bold, black cross. Double click there and the columns will automatically adjust to the appropriate width and make everything easier to read.
- To filter a column, click on the letter of the column to highlight the entire column. Click on "SORT AND FILTER" and then choose "FILTER." The heading will now have a drop-down box. Click the arrow and choose the response you would like to see. To revert to all responses, click the drop-down box again and click "CLEAR FILTER FROM…".



- To sort alphabetically, highlight the entire column by clicking on the letter corresponding to that column (see above). Click on "SORT & FILTER" and then choose "SORT A TO Z." A pop-up box will appear asking if you would like to expand the selection. **ALWAYS CHOOSE EXPAND THE SELECTION**! Not choosing this option would only sort the names but not the corresponding columns resulting in inaccurate data!