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**Sarasota County Schools**  
**Student Information System**  
**Upgrade Project**

**Gap Analysis**  
**Attachment B**  
**To The**  
**Master License Agreement**

Version 2.0

Date Last Updated: November 26, 2008



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## Revision History

Name	Date	Reason For Changes	Version
Raju Katta Inayat Walli	8/22/2008	Initial creation	1.0
David Sellers	8/26/2008	Gradebook and Portal Analysis	1.1
Inayat Walli	9/5/2008	Special Services and Discipline	1.2
Inayat Walli	9/12/2008	Removed Gradebook and Portal sections and placed in a separate document	1.3
Raju Katta Inayat Walli	9/19/2008	Updates from Gap Review Meetings	2.0

# 1. Introduction

## 1.1 Purpose

This document is the Gap Analysis Overview for the Sarasota County Schools TERMS to CrossPointe.net Upgrade Project. This document includes direction on how the Gap Analysis has been structured, a Plan Summary and a Detail Section. The first section provides a project introduction, describes how the Gap Analysis Plan fits into the project documentation, and it identifies timelines, participating staff and responsibilities. The second section contains the outcome of gap meetings that were conducted by CrossPointe.net and Sarasota staff.

The target audience of this document is the project management team, including executives and the steering committee, and members of the Sarasota County Schools TERMS to CrossPointe.net Upgrade Project team. This document provides an overview of the process and provides documentation that the team produced as a result of the gap analysis.

The points of contact for comments about this plan and document are the Program Director, Inayat Walli, Product Manager, Raju Katta, Product Manager, David Sellers and Sr. Account Executive, Stephen Hanner.

## 1.2 Team and Roles

Due to the breadth, depth, impact and risk of this project many participants are involved in development of the Gap Analysis. The Gap Analysis team is responsible for specific gap tasks for each functional area within the Student Information System. Individuals who participate on the Gap Analysis project teams provide input and participation on the gap task required for the project. The following is a list of all Gap Analysis participants. Participants from Sarasota who attended the follow-up Gap Review meetings are noted under the Review column.

### 1.2.1 CrossPointe Participants

Name	Role
Inayat Walli	Program Director
Raju Katta	Product Manager, SIS
Chris Pharo	Product Manager, FL State Reporting System

## 1.2.2 Sarasota Participants

Name	Role	Review
Bob Darois	Applications Manager, Information Services	
Roy Pinchin	Analyst Student, Staff, Finance, Information Services	Yes
Jim Bucher	Help Desk Supervisor, Information Services	
Dawn Stoudt	Help Desk, Information Services	Yes
Barbara Brannen	Manager Data Analysis and Reporting, Information Services	Yes
Rodney Davidson	Analyst Vocational, Information Services	Yes
Tracey Craft	Help Desk, Information Services	
Kathy Mello	Help Desk, Information Services	Yes
Linda Seibel	Analyst State Reports, Information Services	Yes
Susie Manning	Programmer, Information Services	Yes
Greg Gordon	Programmer, Information Services	Yes
Gloria Saputo	State Reports, Information Services	
Cyndi Dickie	Registrar, Booker Middle	Yes
Lynne Early	Registrar, McKintosh Middle	Yes
Pat Kinsey	Data Processor, Pine View	Yes
Dee Kormash	Data Processor, Riverview High	Yes
Melanie Norwood	Registrar, Riverview High	
Jeffri Durrance	Asst Principal, Sarasota Middle	Yes
Linda McCroy	Supervisor, SCTI	
Sally Jennings	Registrar, SCTI	
Diane Biddle	Registrar, Pupil Support	
Sue Manders	Attendance, Pine View	
Lucki Cook	Registrar, Laurel Nokomis	
Lynn Tressler	Registrar, Pupil Support	
Lynn Reid	Registrar, Sarasota Middle	Yes
Diana Anderson	Registrar, Emma Booker	
Trish Allen	Asst Principal, Pine View	
Cindy Hall	Asst Principal, Pine View	
Fran Marx	Guidance, Sarasota Military	Yes
Mellissa Morrow	Director, Career and Tech	
Susan Fisher	School Choice, Placement Office	
Robyn Marinelli	Administrator, Pupil Support	
Lori Stafford	Technician, Research & Assessment	
Linda Baumgartner	Secretary, Research & Assessment	
Linda Glover	Nurse, School Health	Yes
Diane Ontko	Senior Clerk, School Health	Yes
Janice Merritt	Senior Clerk, School Health	Yes
Dr. Natalie Roca	Executive Director, Department of Research, Assessment and Evaluation	

Denise Cantalupo	Supervisor, Student Assessment & Program Evaluation	
Sonia Figueredo-Alberts	Executive Director, Pupil Support Services	
Kathy Devlin	Supervisor, Exceptional Student Education	
Vicky Stillo-Gross	Pupil Support Services Specialists	
Dr. Linda Post	District Discipline Coordinator	Yes
Michael Santagata	Program Specialist	

### 1.3 Project Timeline

The following are milestones associated with the Student Information System Gap Analysis.

<b>Dates</b>	<b>Purpose</b>
5/21/2008	Gap Analysis Meeting – Gradebook and Portal
7/7/2008 – 7/10/2008	Gap Analysis Meetings – SIS
7/17/2008	Gap Analysis Meeting – State Reporting
8/22/2008	Prepare and submit documents to Sarasota for review
8/25/2008	Gap Analysis Review
9/5/2008	Follow-up meeting with Special Services and Discipline
9/15/2008 – 9/16/2008	Gap Analysis Review
9/19/2008	Submit updated document to Sarasota for review
TBD	Sign-off on Final Version

## 2. System Features

Development of the Gap Analysis Plan is categorized by functional areas. The Gap Analysis team has reviewed each module and a detailed list of features identified. The following sections list outcomes of the Gap Analysis meetings and are classified as baseline, future enhancements or customizations.

Functionality of existing TERMS application or equivalent will be included as part of baseline features of the CrossPointe .net software solution

### 2.1 Administration

#### 2.1.1 Baseline Features

##### 2.1.1.1 Academic Planning

- 2.1.1.1.1 Sarasota would like the system to meet the Major Area of Interest requirements as outlined by DOE.
- 2.1.1.1.2 Sarasota would like the system to manage multiple academic plans per student and provide the ability to compare them side by side.
- 2.1.1.1.3 Provide the ability to track Bright Futures and TechPrep requirements in terms of courses and the sequence that is required.

##### 2.1.1.2 Code Tables

- 2.1.1.2.1 Provide the ability to specify date range for every code value to identify valid codes for each school year. Application should validate codes at time of data entry based on record date and year.
- 2.1.1.2.2 The system should provide default values for Code Tables that are Florida State specific.
- 2.1.1.2.3 Highlight inactive code records in code table to identify them easily.
- 2.1.1.2.4 For the Absence Letter code table provide the ability to edit the Staff Type list. This option will be used in sending the emails to the Truancy officer informing student absences.

##### 2.1.1.3 Custom Fields

- 2.1.1.3.1 Provide a more meaningful description when creating a custom field that already exists. Sarasota would like the ability to add notes to each custom field to describe the field requirement and use.

2.1.1.3.2 The List Type in the Custom Fields screen needs to allow for setting a specific year to ensure values that change yearly can be handled. The functionality described in 2.1.1.2.1 is applicable for user defined code table.

#### **2.1.1.4 Global Parameters**

2.1.1.4.1 Provide a flag on the course record indicating the course was dropped. The system currently provides a flag that has an option for Dropped or Graded.

2.1.1.4.2 Sarasota requires the ability to setup multiple calendars at a school (grade level independent). Each calendar at a school may have different start and end dates.

2.1.1.4.3 The State ID field should be the State-defined length (not modifiable).

2.1.1.4.4 Students in class can have different start and end dates compared with other students and class dates. The early completion of a course should not be considered as dropped.

#### **2.1.1.5 Honor Roll**

2.1.1.5.1 Sarasota uses a custom program that checks various parameters to determine honor roll including attendance and discipline. District must provide specific requirements that will determine if a student achieved honor roll.

2.1.1.5.2 Provide an option to select Team when processing honor roll calculations

#### **2.1.1.6 Staff Details**

2.1.1.6.1 Sarasota would like defaulting the Staff ID field when staff record is created based on criteria defined by the district. (i.e., Employee ID). This will be met through the integration of the SIS with the HR application.

#### **2.1.1.7 User Maintenance**

2.1.1.7.1 When selecting schools in the User Maintenance screen, it would be helpful to see the school type in the dialog (i.e., elementary, secondary, etc.).

2.1.1.7.2 Provide the ability to set which schools a user has access to at a global level. Currently the system requires you to set the school access for each Group selected.

2.1.1.7.3 Display a perfect attendance tag for qualified students when viewing demographic information.

2.1.1.7.4 Display Team and Grade Level with student wherever student information is displayed.

### **2.1.2 Future Consideration**

#### **2.1.2.1 Global Parameters**

2.1.2.1.1 Provide the ability to create a Login Restriction Schedule to specify what type of user restrictions to apply (i.e., ability to view records but not update, only attendance module).



This functionality should also restrict access to specific modules of the application. Also this functionality will restrict certain groups to access the application.

## 2.1.3 Sarasota Specific Customization

### 2.1.3.1 Change Log

2.1.3.1.1 Provide the ability to log each user transaction independently and provide an option to rollback specific user operations, if necessary. Sarasota requests logging each user transaction independently and provide option to rollback specific user operations, if necessary. This requires separating every single transaction a user performs and all subsequent transactions which occurred on the database. Database has audit logs (transaction logs), which can be backed up on a separate disk, however, it is not easy to rollback single user transactions and apply subsequent changes to the database. This requires significant software design changes and will not be incorporated into the system. Roll back will require manual intervention and use of standard system screens.

### 2.1.3.2 Code Table

2.1.3.2.1 Provide the ability to define the start sequence number for a discipline event ID based on the current year. Sarasota would like to change incident sequence numbers based on school year for incidents.

2.1.3.2.2 Setup of code table values should have a code valid start date and unless code is no longer valid, end date should be left blank

## **2.2 Student Demographics**

### **2.2.1 Baseline Features**

#### **2.2.1.1 Search**

- 2.2.1.1.1 The system should provide the ability to search students by SSN using advanced search option.
- 2.2.1.1.2 Provide the ability to search for a student by license plate number. This requirement will be met through development of a report.

#### **2.2.1.2 Primary Info**

- 2.2.1.2.1 Provide a merge procedure that can combine duplicate students as a result of data entry error or human error. The district will provide specific requirements as to how this process will work.

#### **2.2.1.3 Quick Entry**

- 2.2.1.3.1 Add a student search process to ensure user has searched for student before entering enrollment record. Sarasota requires this functionality to reduce duplicate records in the application.
- 2.2.1.3.2 The use of Future Enrollment as terminology needs to be replaced with the use of Admissions to eliminate confusion.
- 2.2.1.3.3 Indicate the last user update Name, Date and Time somewhere on each screen.
- 2.2.1.3.4 For any record changes that are a result of a program/batch process update, indicate the program that last modified that record (in place of User Name)

#### **2.2.1.4 Phone List**

- 2.2.1.4.1 Need ability to identify which contact phone number should be used for the ConnectEd extract Sarasota requires to identify phone numbers which are used in auto dialers (ConnectEd) when student contact has multiple phone numbers.

#### **2.2.1.5 User Defined Reporting**

- 2.2.1.5.1 Provide the ability for the district to create and publish customized Views for reports (ie, Bright Futures). Sarasota administrative users will be trained on how to use UDR models and supported with documentation, which explain how to modify basic models to include user created views. Further training/discussion is needed to explain the update process.
- 2.2.1.5.2 Provide Model Views that contain fields specific to State Reporting data. Also include access to snapshot data in the Views.

2.2.1.5.3 Any view containing course number should make the field available as a 7-digit number and also 8-digit number, where the 7-digit course number contains the first 7 digits of the entire (8-digit) course number.

#### **2.2.1.6 Additional Info**

2.2.1.6.1 Add a Hispanic indicator (Yes/No flag).

#### **2.2.1.7 Lunch Status**

2.2.1.7.1 The system must ensure that lunch status information is only available to specific users by way of district definable user-security.

2.2.1.7.2 Security on lunch status should apply to UDR roles and reports

#### **2.2.1.8 Labels**

2.2.1.8.1 The system must provide for printing of labels based on student home language.

2.2.1.8.2 The district would like the ability to specify a partial course number (i.e., first 4 digits of course) to generate labels with student information.

2.2.1.8.3 District to provide a list of existing filter criteria for producing labels

### **2.2.2 Future Consideration**

#### **2.2.2.1 Labels**

2.2.2.1.1 When requesting labels for mailing report cards or other distributions to the parents, provide an option to include an address flag that indicates to print a label in addition to the student's home address. The purpose of this would be to accommodate students that have divorced parents and want to keep informed about student activities as well as the student's progress.

2.2.2.1.2 Provide the ability to print labels by household.

### **2.2.3 Sarasota Specific Customization**

#### **2.2.3.1 Lunch Status**

2.2.3.1.1 Sarasota requested nightly data extract procedure to upload student information to their food service data. Further analysis is required to identify the food service field requirements and field mapping between two applications.

#### **2.2.3.2 Primary info**

2.2.3.2.1 Sarasota uses their own address tracking system (TRAPEEZ) to validate students and contacts addresses. CrossPointe.net's address validation process requires utilizing the address information that already exists in Sarasota's address tracking system. Need a data exchange process to integrate address information between these systems.

## **2.3 Enrollment**

### **2.3.1 Baseline Features**

#### **2.3.1.1 School Enrollment**

2.3.1.1.1 Bus information section needs to track more than a single Pickup and Delivery Route, Sequence and Stop. The system will need the ability to store each of these fields for every day of the week (5 separate fields).

2.3.1.1.2 Sarasota would like an enrollment summary panel that provides information for a selected school by grade with totals. A district-wide version of this should also be available providing totals for all schools.

#### **2.3.1.2 Withdrawal**

2.3.1.2.1 Remove the Delete option under Type of Course Drop as this functionality is not needed.

2.3.1.2.2 The system must allow a student to be enrolled in more than one school at a time. At this time, students can only have one active primary school of enrollment at any time. Student enrollment process and State Reporting requirements will consider student from primary school of enrollment. System also has option to turn off multiple school enrollment, so a student can only have one active enrollment record at a time.

2.3.1.2.3 The Transfer in District fields should not create an enrollment record automatically for the receiving school. There should also be a notification to the receiving school that the student requested transfer. The Entrance Date should be an indication of the date the student requested transfer and not an actual enrollment date.

2.3.1.2.4 Provide a notes field within the Transfer in District section.

2.3.1.2.5 It would be beneficial if the Transfer in District section creates a placement record (i.e., transfer or re-assignment) for the receiving school.

2.3.1.2.6 Each request for transfer records should track when the request received, who made the request and who sent the documents. In Florida, transfers should track student's transfer District ID and School ID

2.3.1.2.7 For withdrawal codes that indicate a district exit, provide an option within the Withdraw control record to allow for setting that code as a District Exit code. If the user selects this code when withdrawing a student, the system should automatically populate the Exit Date field.

#### **2.3.1.3 Reports**

2.3.1.3.1 Provide a report that is based on a bus number and the students, their contact information and stops for a specific bus number

## **2.3.2 Future Consideration**

### **2.3.2.1 Withdrawal**

2.3.2.1.1 The district currently does not have a standard withdrawal form but would like to discuss further.

## **2.3.3 Sarasota Specific Customization**

None

## 2.4 Grades

Sarasota tracks Athletic GPA and they would like to implement this in CrossPointe.net. Also they would like to implement the work flow by informing counselors (via email) when a student fails a class.

### 2.4.1 Baseline Features

#### 2.4.1.1 GPA

2.4.1.1.1 Need to evaluate requirements for Athletic GPA. Need to identify what courses are included in this GPA. Also need to evaluate existing fields to ensure the system is storing this value with a calculation date.

2.4.1.1.2 Sarasota would like a report that provides a summary at the school level of average GPA per Grade Level. This report should identify the School GPA average at a glance to denote the failing schools.

2.4.1.1.3 Sarasota would like to Display Athletic GPA in student GPA summary screen with other GPA values.

#### 2.4.1.2 Period GPA

2.4.1.2.1 Display a summary of all GPAs for slots (marking periods) as well as cumulative on a single screen.

#### 2.4.1.3 Skills

2.4.1.3.1 Provide the ability to view PDS skills on the screen and change the values.

#### 2.4.1.4 Parent Portal

2.4.1.4.1 Provide a summary screen that includes a graduation summary of credits remaining.

2.4.1.4.2 Provide the ability to turn off the option for parents to enter Course Requests.

2.4.1.4.3 An administrative component is necessary so a district-level user can support and manage the Portal.

#### 2.4.1.5 Reports

2.4.1.5.1 Provide a failure report that lists students for specific course numbers

**2.4.2 Future Consideration**

None

**2.4.3 Sarasota Specific Customization**

None



## 2.5 Transcripts

Sarasota has developed an interface for implementing FASTER requirements and would like to continue these in the CrossPointe.net application. Sarasota would like to implement an interface for the academic planning module based on Major Area of Interest and ePEP requirements.

### 2.5.1 Baseline Features

#### 2.5.1.1 *Transfer*

2.5.1.1.1 All information required for FASTER must be available in the system including processes.

2.5.1.1.2 Sarasota would like the ability to not send certain information through FASTER such as Rank.

#### 2.5.1.2 *General*

2.5.1.2.1 Sarasota would like to setup a workflow to notify counselors when student fails a course.

#### 2.5.1.3 *Academic Plan*

2.5.1.3.1 Need to have further discussion on Major Area of Interest (MAI) and impact of changes.

2.5.1.3.2 If a student is missing a course as part of MAI, counselors should be notified. May already be a requirement of ePEP and requires further research.

#### 2.5.1.4 *Academic Plan*

2.5.1.4.1 The system must interface with ePEP.

### 2.5.2 Future Consideration

None

### 2.5.3 Sarasota Specific Customization

None

## **2.6 Testing/Assessment**

Sarasota developed a custom test tracking system of which there are many features they would like to include in CrossPointe.net. The following list details some of these features and where noted, further discussion to analyze required features.

### **2.6.1 Baseline Features**

#### **2.6.1.1 Test**

2.6.1.1.1 Sarasota would like to be able to see a list of students for a specific class along with their testing scores.

2.6.1.1.2 Provide a way for the system to verify that any test descriptions are valid against State fields/descriptions.

2.6.1.1.3 Include test information on printed transcript.

2.6.1.1.4 Allow teachers to see multiple scores for the same test along with details of scores and averages for their class.

#### **2.6.1.2 Test File Configuration**

2.6.1.2.1 Provide a template for tests that are standardized to eliminate the need to recreate these initially.

#### **2.6.1.3 Test Master**

2.6.1.3.1 Provide a field that includes the State Test ID at both the test and subtest setting.

2.6.1.3.2 Verify any State requirements tied back to FASTER are incorporated.

### **2.6.2 Future Consideration**

#### **2.6.2.1 Test**

2.6.2.1.1 Provide the ability to limit what data users are allowed to see within a test based on their user profile.

### **2.6.3 Sarasota Specific Customization**

#### **2.6.3.1 Interface**

2.6.3.1.1 Sarasota developed a test tracking system of which there are several features they would like to include in the application. A separate meeting will need to take place to further define the scope of this project.

## 2.7 Discipline

Sarasota would like the system to use common terminology when naming events/infractions. Sarasota would like to interface the Disciplinary module with attendance module to post attendance automatically for suspended students. The district also desires to add a referral process work flow to this module.

### 2.7.1 Baseline Features

#### 2.7.1.1 Event

2.7.1.1.1 The terminology in the system should conform more to the existing system. Use of the term Event (Infraction) to denote an occurrence of a discipline event. This will clearly indicate when multiple incident types occur.

2.7.1.1.2 Add the following fields pertaining to events: Context, Location within District, Involvement Type, Property Damage, Reported to Law Enforcement.

#### 2.7.1.2 Incident

2.7.1.2.1 The codes in the drop down need to conform to the State codes.

2.7.1.2.2 Provide the ability to add pictures of evidence associated with the incident.

2.7.1.2.3 Provide the ability to add multiple students to a single incident.

2.7.1.2.4 Allow creation of incidents that are not reported to the State.

2.7.1.2.5 Add a field to store a case number when the incident is reported to police.

2.7.1.2.6 When adding an incident provide the ability to add multiple actions at once rather than selecting one at a time

2.7.1.2.7 Add a filter condition on the screen to display students in a special services program

#### 2.7.1.3 Group Infraction

2.7.1.3.1 Change the word Group Infraction to Quick Entry to make it more clear what the purpose of this screen is.

#### 2.7.1.4 Infraction / Action

2.7.1.4.1 Sarasota would need ability to denote what type of Drug if a Drug related incident.

2.7.1.4.2 Calendar selection should indicate the valid school days. The system should also verify if multiple calendars exist in the system for that school.

2.7.1.4.3 The Infraction Type and Location should default based on the values selected on the Incident screen.

- 2.7.1.4.4 The Referred Staff field should limit to School instead of district wide.
- 2.7.1.4.5 The Location field needs to allow for a value that may not already exist in the dropdown.
- 2.7.1.4.6 If a user specifies the number of days and a start date it should calculate the end date.
- 2.7.1.4.7 If a user specifies a start and end date it should calculate the number of days.
- 2.7.1.4.8 SESIR fields need to have logic that requires user to enter specific code/information.
- 2.7.1.4.9 Add the number of action days to the summary view of a student's infraction/action summary.
- 2.7.1.4.10 Provide the ability to add Video/Audio materials/files and allow this to be referenced at the incident level.
- 2.7.1.4.11 Allow Action From and To dates to span beyond school year dates.
- 2.7.1.4.12 Provide the ability to make the Action Status a multi-select field
- 2.7.1.4.13 Would like the ability to handle expulsions using a workflow process to ensure all required parties are involved at the appropriate time.
- 2.7.1.4.14 When a student is referred for evaluation, it takes a certain number of days to complete the evaluation. During that time the student may move to a different school. Provide a display icon (i.e., flag) that indicates to the registrar that student needs further attention.

#### **2.7.1.5 Labels**

- 2.7.1.5.1 Add an option to select a print language mostly Spanish.

#### **2.7.1.6 Reports**

- 2.7.1.6.1 Team is a very important field used for grouping and sorting. This must be available in all Report Criteria screens.
- 2.7.1.6.2 Provide an option to select Teacher in all reports.
- 2.7.1.6.3 Provide the ability to pull a report of students that have a certain number of days suspended. This requirement will be met by adding a parameter to the reports criteria page
- 2.7.1.6.4 Add additional grouping capability to reports criteria page to allow for zip code, grade level and infractions

### **2.7.2 Future Consideration**

None

### **2.7.3 Sarasota Specific Customization**

#### **2.7.3.1 Reports**

- 2.7.3.1.1 Discipline Referral Form: Sarasota would like to develop a discipline referral process (forms) which can be used by their staff to report disciplinary incident. Further discussion is needed to evaluate this requirement.
- 2.7.3.1.2 Automate the generation of discipline letters based on input criteria that can be specified by the district.
- 2.7.3.1.3 Provide statistical reports base on expulsion (action) which indicates how many students received expulsion, how many are served expulsion, how many served at same school (deferred expulsion), how many students served at alternate campus (agreement signed), and how many students broke the agreements.
- 2.7.3.1.4 Provide a report on school environment, which is based on infraction (weapon and drug related)

## **2.8 Attendance**

### **2.8.1 Baseline Features**

#### **2.8.1.1 Attendance**

- 2.8.1.1.1 Provide the ability to add a note for a student explaining the absence by attendance office on each day. Further discussion by the district is needed if this note is to be displayed in Gradebook and Parent Portal.
- 2.8.1.1.2 Explore the ability for the Parent Portal to be an Athletics Portal or Activity Portal by flagging students in that activity with one or more teachers. The Gradebook application provides this capability using PE classes and group classes.
- 2.8.1.1.3 Need to incorporate the process to handle students with excessive absences and notification to DMV for suspending student's driving privilege.
- 2.8.1.1.4 Add the ability to take attendance by period when class meets for multiple periods.
- 2.8.1.1.5 The system needs to flag students who have excessive absences. This is also available as a report.
- 2.8.1.1.6 Provide the ability to search for a teacher and pull all classes. Currently, a teacher can take class attendance for both periods when class meets two periods. Need to identify further requirements on period by period attendance.
- 2.8.1.1.7 Sarasota to provide additional information on how attendance impacts notification to DMV.
- 2.8.1.1.8 Provide the ability to mark attendance (eligibility) at the student level. Some students may be in a teacher's class but should not be marked for attendance only grade.

#### **2.8.1.2 Mass Update Student**

- 2.8.1.2.1 If a student is given In School or Out of School Suspension, have the attendance dates automatically marked for those days in advance. If the suspension is later revoked then attendance should be removed manually. This feature needs to be reviewed by Asst. Superintendent prior to committing.

#### **2.8.1.3 Reports**

- 2.8.1.3.1 Add an option to print Attendance letters based on student's home language. Make the print language an option in case district wishes to print them in English (default).

## **2.8.2 Future Consideration**

### **2.8.2.1 Workflow**

- 2.8.2.1.1 Provide a way to configure the system so it notifies a truancy worker if a student exceeds a certain number of absences. Need to identify how the truancy worker and student relationship is established.

## **2.8.3 Sarasota Specific Customization**

None

## 2.9 Special Services

### 2.9.1 Baseline Features

#### 2.9.1.1 Program List

- 2.9.1.1.1 Need to provide one field for primary exceptionality and up to 9 other exceptionalities in addition to a primary.
- 2.9.1.1.2 Add a field that stores the Matrix for each student.
- 2.9.1.1.3 Sarasota would like the ability to attach an IEP to a student.
- 2.9.1.1.4 All fields currently available in TERMS pertaining to special programs need to be available in the system.
- 2.9.1.1.5 The system must handle special processing for program code 120.
- 2.9.1.1.6 If a student is marked as an ESE student then it should denote that when a change is made to that student's status.

#### 2.9.1.2 Counselor

- 2.9.1.2.1 Need a way to track the number of minutes for students who are pulled out of class. This feature should also be available in the Portal.
- 2.9.1.2.2 Provide a teacher activity log with student similar to counselor log. The Teacher Log is requested to track the number of minutes a student is pulled out from a class to receive special service as per their IEP.
- 2.9.1.2.3 Provide a filter to limit the number of years of conference notes that appear.

#### 2.9.1.3 Mentor Daily Log

- 2.9.1.3.1 Provide mentors the ability to track the number of minutes for students who are pulled out of class and dates.

### 2.9.2 Future Consideration

#### 2.9.2.1 Program List

- 2.9.2.1.1 Provide a single-entry screen that contains all of the required fields for DOE. This would simplify data entry and allow users to manage the data on a single screen.



## 2.9.3 Sarasota Specific Customization

### 2.9.3.1 Tracking

- 2.9.3.1.1 Sarasota recently purchased a system called Cayen. The district will continue to use their "DataMart" as it contains considerable logic and stored procedures that handle data manipulation. CrossPointe will provide the field mappings to the SIS tables where the data will be pulled from and written back to.
- 2.9.3.1.2 Sarasota utilizes a system called Excent to manage IEP development. Further discussion as to the data and interface requirements needs to be discussed.
- 2.9.3.1.3 Provide the ability to modify certain display field names to accommodate district's terminology. Any field name changes must be specified and performed by the CrossPointe development team.
- 2.9.3.1.4 Provide the ability to hide certain fields so users are unable to view specific data elements. Any changes to screens must be specified and performed by the CrossPointe development team.
- 2.9.3.1.5 S702 allows ability to add a matrix for FEFP funding factor. Sarasota currently modified this to restrict users from enter 254 and 255 except for one school (Oak Park). Need to review the existing panel and impact of baseline system.
- 2.9.3.1.6 Local codes 251-255 are used for Matrix and these codes are required to convert into state specific data based on grade level (111 to 113).
- 2.9.3.1.7 The district has developed a system called PALS which allows mentors to enter number of minutes for students in various programs (i.e., Big Brothers, Big Sisters, Teen Trendsetters and Take Stock). Mentor log information is imported into the student system to display the final outcome from PALS. This includes student id, program code and amount of time student is mentored. CrossPointe to provide field mappings for the interface to and from PALS.
- 2.9.3.1.8 Other data interfaces / 3rd Party systems which may require further analysis include Excent, SRI (Scholastic Reading) and Princeton Review

## 2.10 Health

### 2.10.1 Baseline Features

#### 2.10.1.1 Class Attendance

2.10.1.1.1 Provide teachers the ability to view, in terms of attendance if a student is currently at the nurse's office.

#### 2.10.1.2 Daily Log

2.10.1.2.1 The Time Out field should be required when the user deselects the Draft option.

2.10.1.2.2 Need further discussion on use of Visit Type and Concern.

2.10.1.2.3 Replace the LSN column on the Daily Log with a provider column (i.e., RN, Physician, etc.).

2.10.1.2.4 Sarasota would like to attach the ICD9 codes to the Finance module.

2.10.1.2.5 Add a display field that indicates how many times the student visited the health office.

2.10.1.2.6 Need to track Abuse Registry. Field is briefly displayed and hidden, but tracked in database.

2.10.1.2.7 District has developed custom screens to track clinic visits and intervention. Documents were provided on a CD along with screen shots of the existing customized health module in use at Sarasota. A separate proposal will need to be prepared as the work done by the district is quite extensive.

2.10.1.2.8 District would like to use the Staff Initials field as an electronic signature. District will need to determine if it is an acceptable method for documenting an official signature. Add fields that track counters for medication given, intervention count on daily log screen

2.10.1.2.9 Provide fields to store Injury Classification and Injury Location.

2.10.1.2.10 Add Referred To field on daily log screen which differs from Action

2.10.1.2.11 Ability to track any vision tests performed on Daily log. No details on vision test, only indicator of yes/no.

2.10.1.2.12 Allow daily log screen to copy from student's previous visit data therefore user can perform quick entry for students with chronic medical issues. The copy options can be (all previous day visits, previous visit, new visit)

2.10.1.2.13 Ability to track a mass lice check (Pediculosis) on given date. Number of students checked by grade level. This is not required to track by each student.

### **2.10.1.3 Growth**

2.10.1.3.1 Automatic BMI % calculation and reports on various BMI levels.

2.10.1.3.2 The system should provide the ability to include BMI letters.

### **2.10.1.4 Health Concerns**

2.10.1.4.1 Sarasota would like to consider the integration of an IHP system. Providing the ability to add attachments may be sufficient to meet this requirement.

### **2.10.1.5 Immunization**

2.10.1.5.1 Shot requirement report

### **2.10.1.6 Epidemics**

2.10.1.6.1 Have several fields used to track potential epidemics. Certain fields require additional input.

### **2.10.1.7 Student Medication**

2.10.1.7.1 The system needs a controlled medication count log.

2.10.1.7.2 Remove the Med Error flag from the Medication Log screen. If it must be there, then change the label to Med Variance.

2.10.1.7.3 Add a flag to the Medication Count screen which indicates a parent did sign the required form.

## **2.10.2 Future Consideration**

None

## **2.10.3 Sarasota Specific Customization**

Sarasota has developed an extensive health module that interfaces with the TERMS system. Some of the differences in how the district's health module differs from CrossPointe include the following.

- Tracking of health concerns rather than the visit type.
- For Department of Health reporting purposes, the system tracks how many actions are taken rather than providing details on specific actions taken.
- The health module is developed based on state requirements and specifically on data elements and summary data the State requires. Whereas the CrossPointe health module tracks detailed information.

CrossPointe conducted a follow-up meeting with the district to outline the possibility of incorporating the functionality currently available in the district's health module within CrossPointe. The district provided screen shots of the existing health module and several reports that are used for submitting information to the Department of Health. CrossPointe intends to include the existing functionality into the product required for reporting to the DOH. In order to ensure completeness, the district will be involved in reviewing updated screens and functionality during the project implementation phases.

## **2.11 Scheduling**

### **2.11.1 Baseline Features**

#### **2.11.1.1 Course List**

2.11.1.1.1 Need the ability to view courses in prior year catalogs.

2.11.1.1.2 The Course Master should be year-based to ensure users do not select an invalid course number.

#### **2.11.1.2 District Course**

2.11.1.2.1 Sarasota would like the Schools Available/Selected field to default so any school that contains an eligible grade level appears in the list.

2.11.1.2.2 Need to discuss the process for loading Course Master received from DOE.

2.11.1.2.3 Existing fields in TERMS need to be added to the system.

#### **2.11.1.3 Help**

2.11.1.3.1 The system should provide field level help. There will be a Wiki-based help system.

#### **2.11.1.4 Pattern Details**

2.11.1.4.1 Schools should not be able to override the District calendar. Only days that are defined as school days by the district should be available to the schools.

#### **2.11.1.5 Potential Conflicts**

2.11.1.5.1 The window that provides a list of all students who are in a course with a conflict should allow user to select the student from that screen and view their requests.

#### **2.11.1.6 Reports**

2.11.1.6.1 SSB Prep Diagnostic report needs Team added to the report.

2.11.1.6.2 Provide a report that shows students who were not scheduled because a prerequisite was not met.

2.11.1.6.3 Prerequisite option and report for unscheduled courses due to prerequisites.

2.11.1.6.4 Indicate the school, building number and time class meets on the schedule record.

**2.11.1.7 Request by Student**

- 2.11.1.7.1 The system should provide the ability to tie in the course requests from the Academic Plan.
- 2.11.1.7.2 The system would need to indicate if a student requests a course that has already been taken.
- 2.11.1.7.3 Display previous earn grade on student course request if the course is previously taken. Also indicate the failing grade in a different color (69 and below in red).

**2.11.1.8 Room**

- 2.11.1.8.1 Sarasota would like to add a phone number associated with a room.

**2.11.1.9 Scheduler**

- 2.11.1.9.1 Sarasota would like to have an alternate Team assignment if the scheduler is unable to place the student in the Primary Team.
- 2.11.1.9.2 The system should provide for elementary scheduling by way of Homeroom Packaging. The system currently provides similar functionality using the Course Grouping option.
- 2.11.1.9.3 Scheduling process should verify student academic history (previous schedules and transfer) records and indicate to the user if the course was already taken.

**2.11.1.10 Schedule (Class List)**

- 2.11.1.10.1 This screen will need to be available in Gradebook so teachers can assign students to specific classes.

**2.11.1.11 Section Update**

- 2.11.1.11.1 Sarasota would like to be able to see the Team on the screen.
- 2.11.1.11.2 When displaying Potential Conflicts, the pop up screen should display the Grade Level and Team.
- 2.11.1.11.3 Provide the ability when building sections to limit how students are scheduled. This is referring to an option for the scheduler to use maximum seat count instead of optimum seat count in during the scheduling process.
- 2.11.1.11.4 Provide a Team search option on this screen.

**2.11.1.12 Parent Portal**

- 2.11.1.12.1 The course request ability on Parent Portal should provide the ability to set by each school instead of district defined.

2.11.1.12.2 Schools should be able to set courses that are visible through the Parent portal. This will allow schools to remove special needs courses from the Portal, but still allow counselors to add these courses into student requests.

2.11.1.12.3 Request processing steps:

*2.11.1.12.3.1 Student makes requests from Portal*

*2.11.1.12.3.2 Teacher reviews these requests and makes recommendation on student requests*

*2.11.1.12.3.3 Department chairs and Counselor will review these requests*

*2.11.1.12.3.4 Final requests are submitted for scheduling process*

**2.11.1.13 Scheduler**

2.11.1.13.1 Provide the ability to limit how many total students a teacher can teach.

## **2.11.2 Future Consideration**

### **2.11.3 Sarasota Specific Customization**

#### **2.11.3.1 Teaming**

2.11.3.1.1 Some of the middle schools do team teaching manually. Currently, the team of teachers sit together and bubble each student's schedule on a scan sheet. The scan sheets are processed and the data is loaded into the application. The district would like to have a screen in the student system where teachers can view a team of students and schedule students into periods.

## 2.12 State Reporting

State Reporting as mandated for K-12 and Vocational students by Florida Department of Education is extensive and CrossPointe's TERMS system currently meets all of the requirements.

Below are additional features requested by Sarasota that will be included in CrossPointe.net. CrossPointe will configure and develop all of the functionality necessary to comply with FL DOE reporting requirements.

### 2.12.1 Baseline Features

#### 2.12.1.1 General Requirements

- 2.12.1.1.1 Need the ability to allow multiple users the option to run the same reports using the same parameters.
- 2.12.1.1.2 Provide the ability to lock enrollment records for prior years so users can not edit them.
- 2.12.1.1.3 Sarasota would like UDR to provide access to external files.
- 2.12.1.1.4 The field First Year in School should not assume consecutive years in US for calculation of immigrant.
- 2.12.1.1.5 Currently run a batch program that identifies all students with a withdrawal code of W02. If the receiving school does not enroll the student it must be returned to the original school.
- 2.12.1.1.6 Sarasota would like to store information on a student when a request for records is received to indicate the date when the request was made and the requesting district.
- 2.12.1.1.7 Provide the ability to allow same FISH number to be used by another school. All FISH numbers are unique in the district, however, one school can use a FISH number that belongs to a different school to indicate that class is being taught there.
- 2.12.1.1.8 Need ability to track student's who are on Progress Monitoring (PMRN). A field will be available to indicate student is on Progress Monitoring.

#### 2.12.1.2 Data Edit and Validation

- 2.12.1.2.1 Wherever possible, perform DOE edits and validations at the entry screen level.
- 2.12.1.2.2 Associate edits with control records wherever possible.

#### 2.12.1.3 FTE Calculation

- 2.12.1.3.1 Provide a report that outputs the weighted funding amount based on the translation of codes.



#### **2.12.1.4 Dropout Rate**

2.12.1.4.1 Provide a means of calculating the dropout rate for a given year.

2.12.1.4.2 Provide a report showing graduation rate changes from year to year.

2.12.1.4.3 Provide reports that show discrepancies in the archive data.

#### **2.12.1.5 Class Size**

2.12.1.5.1 Provide class size calculation.

2.12.1.5.2 Provide a report that identifies all classes that do not meet the specified target.

#### **2.12.1.6 Data Edit and Validation**

2.12.1.6.1 All edits and control record edits must have date parameters to ensure consistency and data integrity as a result of new DOE rules.

#### **2.12.1.7 FTE Calculation**

2.12.1.7.1 When users change values of fields pertaining to student course information, the system should prompt user to re-calculate FTE.

### **2.12.2 Future Consideration**

#### **2.12.2.1 Class Size**

2.12.2.1.1 Provide what-if processing for class size data that shows the effect of adding or removing classes.

2.12.2.1.2 District would like this to be based on either Student database or Survey database. If only one choice, use Survey data.

### **2.12.3 Sarasota Specific Customization**

#### **2.12.3.1 Reports**

2.12.3.1.1 Provide verification reports that indicate any inconsistent data

2.12.3.1.2 All verification reports need to be able to run against live data and survey data

2.12.3.1.3 Provide ability to open and close survey period data (so users can not update any information)

2.12.3.1.4 Post process should allow partial post of data for specific schools rather than entire district

- 2.12.3.1.5 Need ability to export data into external files to translate codes and resubmit to DOE
- 2.12.3.1.6 ELL extract for courses that are Language Arts or not and then determine if all students are ESOL and if not then a different code must be set
- 2.12.3.1.7 Display state validation message instead application validation message.
- 2.12.3.1.8 Provide a graduation rate report that uses 3 years of archive data and existing year enrollment/withdraw data to determine what the State will publish as graduation rate.

### **3. Assumptions and Dependencies**

- a. Need to address the issue of converting old student IDs that use SSN. This will be handled during the data conversion process and requires further discussion as to how to create student IDs for these students.
- b. A comprehensive review of each and every report currently used by Sarasota was not conducted. Reports identified by Sarasota as custom are documented in the appropriate sections in this document.
- c. Student ID will assume the districts “ N Number” format of Nxxxxxx and the student SSN will be stored elsewhere