Slide 1

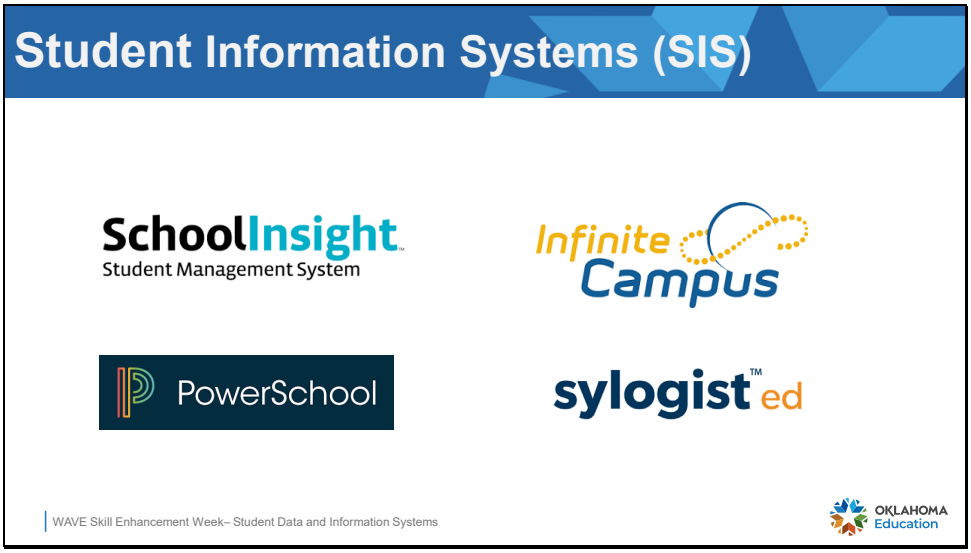
# Data and Information Systems

*First Quarter Statistical Report (FQSR)*

June Gerred, Program Manager

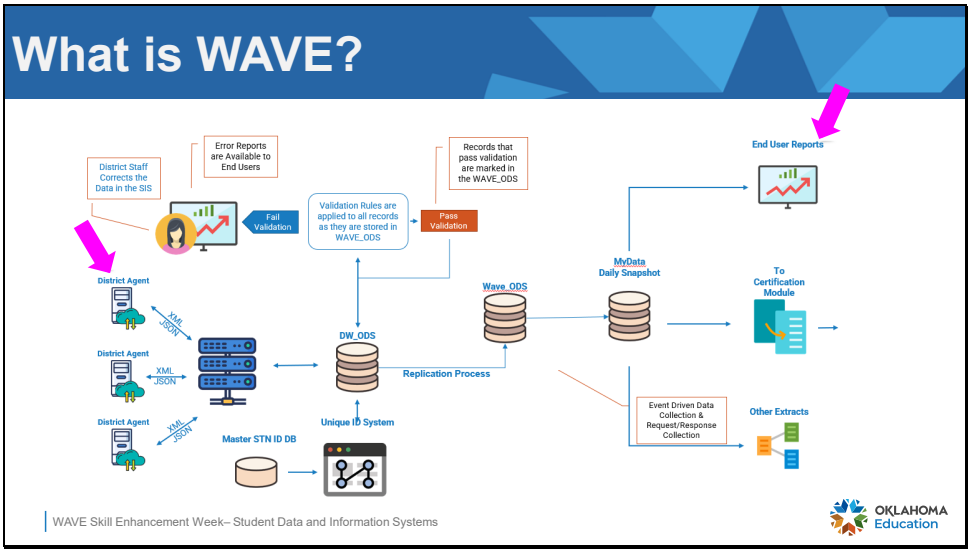
OKLAHOMA Education

Slide 2



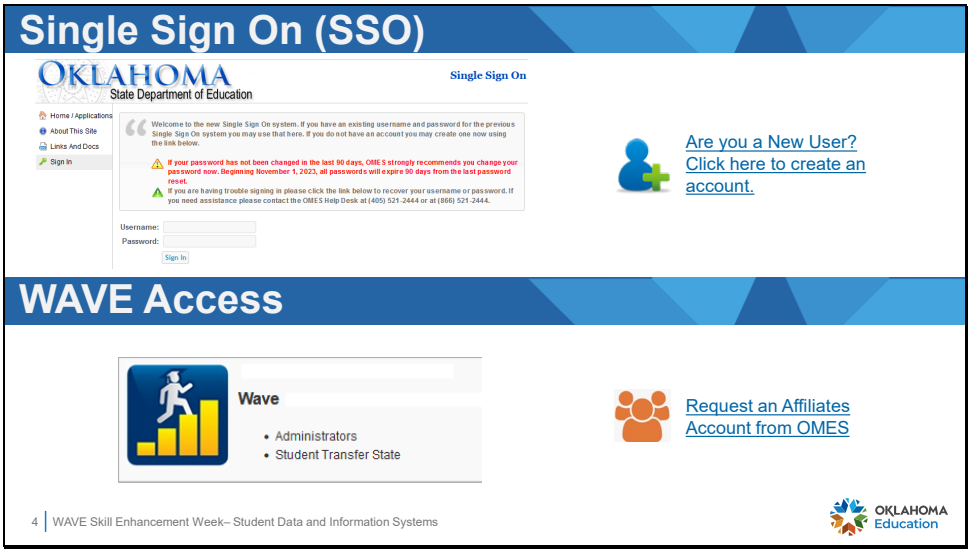

There are four student information systems approved to work with OSDE for SY 2024. Understanding how your SIS interacts with the OSDE through the SIF agent will help you send high quality data to the WAVE.

Slide 3




This diagram represents the complexity of data that is sent from your vendor, through a SIF agent where it is validated and prepared for state and federal reporting.

Slide 4




Two accounts are required to access WAVE. One for access to Single Sign on where apps are located. A second account to access the WAVE application. SSO access is granted by the SSO Administrator in the district. After the SSO Administrator in the district has added one WAVE permission to a user account, the user must request an Affiliates account from OMES using the link provided on the slide. The Affiliates account is a Microsoft account created for the user as an affiliate of OSDE. The first time it is used, the user will sign into the WAVE app, then be asked to sign into Microsoft with the newly created Affiliates email address. If the user has more than one Microsoft account, select the Affiliates account to use for WAVE access.

This requires some planning ahead as the account set up process can take up to a week during busy times.

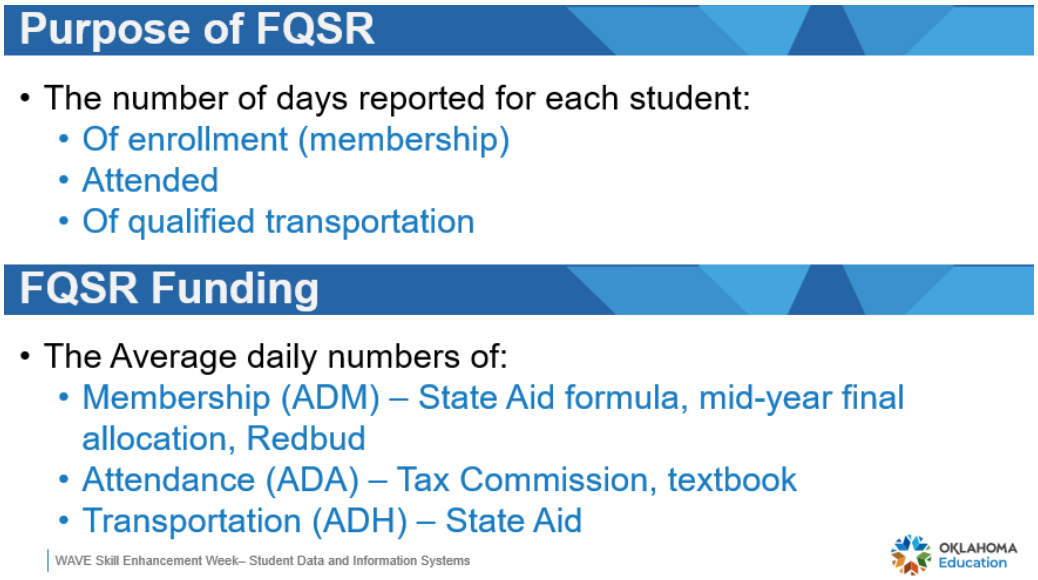
Slide 5

First, log into Single Sign On (SSO), then select the WAVE app from the list. Sign into WAVE with the user's Affiliate account.

Slide 6

The First Quarter Statistical Report (FQSR) is the enrollment and attendance record of all students who have been enrolled in a school at any time during the first quarter of the school year.

Slide 7




The FQSR reports the number of days each student:

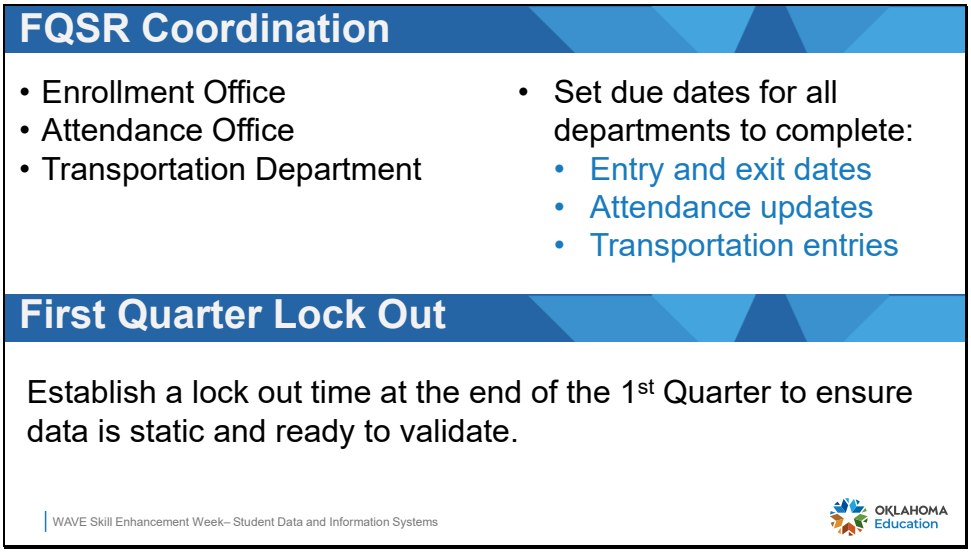
- was enrolled in a school, (membership),
- was present in school (attendance),
- was qualified for transportation funding.

Any student that attended the school anytime during the 1st quarter will be included in the **FQSR**. Any student that attended the school anytime during the year will be included in the **ASR**. As opposed to the October 1 Consolidated Report which includes only students who were enrolled on October 1, or the designated count day.

**Funding**:
ASR - Initial state aid funding based on the highest number from either the current school year or the previous school year. Ex: the highest numbers from either ASR SY2023 or ASR SY2022 would be used for SY2024 state aid funding.
FQSR - Mid-year state aid funding, which would be the final allocation for SY2024.

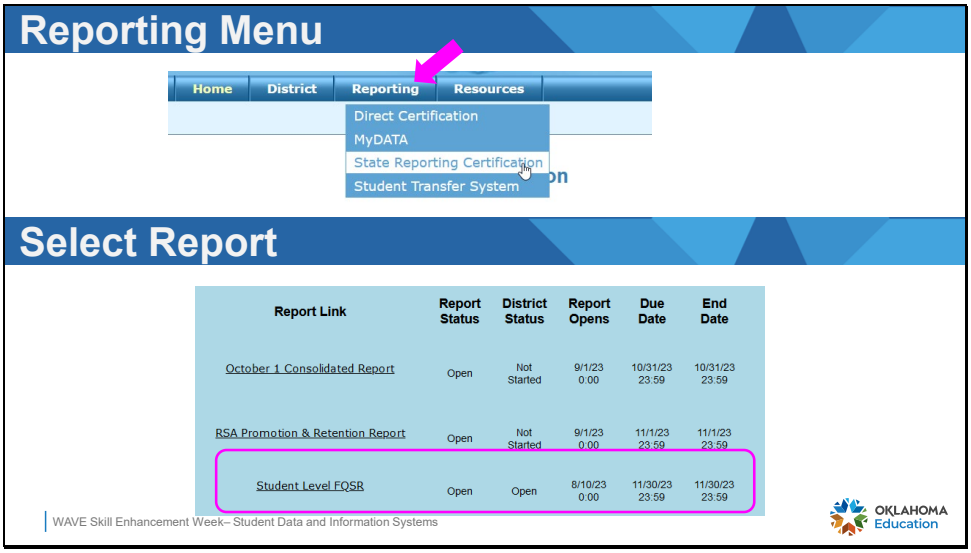
ADM – State aid formula for funding which has a huge impact on school funds. ADM is used for Redbud funding.
ADA – Used by the Oklahoma Tax Commission and for local funding. Textbook allocations are based on the district's ADA.
ADH – Statie aid funding for students eligible for transportation to and from school.

Slide 8




Before completing the final validation of the FQSR it is important to ensure all involved departments or staff at each school site has the enrollment, attendance and transportation data completed for the 1st quarter of the school year. Publish an expected date of completion to site users. Most SIS programs have a method of locking 1st quarter data, which prohibits updates to student data in these 3 areas. This allows updates or corrections to data only to be made by staff with approved authorization.

Slide 9

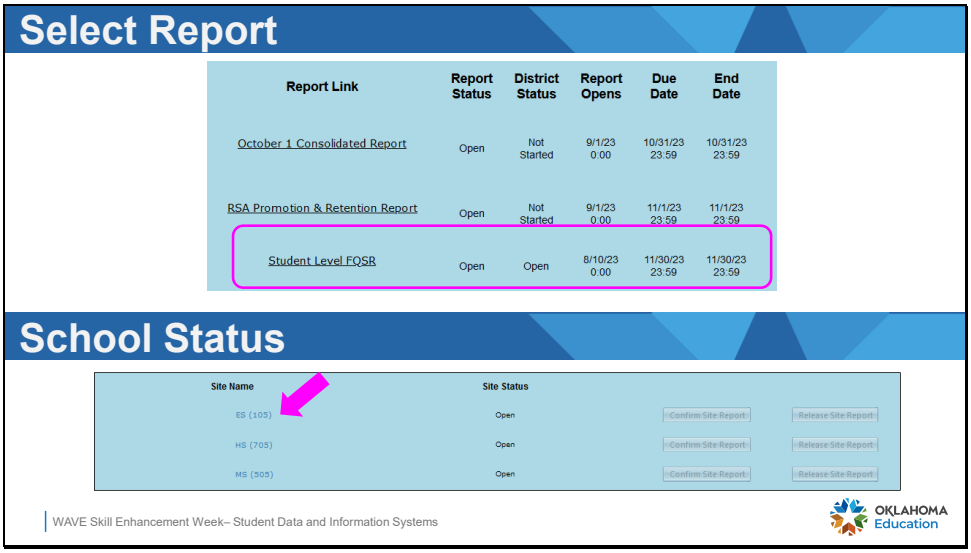



Inside WAVE, select the State Reporting Certification option from the WAVE menu located at the top of the display. A list of WAVE reports will be displayed. Locate the Student Level FQSR in the report list. Take note of the date the report will open, giving the user access to begin reviewing data. The FSQR is due ten days after the end of the first quarter, or before the audit. The due date is specific to each district. The assigned Regional Accreditation Officer (RAO) will set a date with the district to complete the FQSR audit.

The displayed due date for the FQSR represents the last day the RAO can access the report for audit purposes.

This report demands significant time to complete and requires precise validation of the reported data.

Slide 10

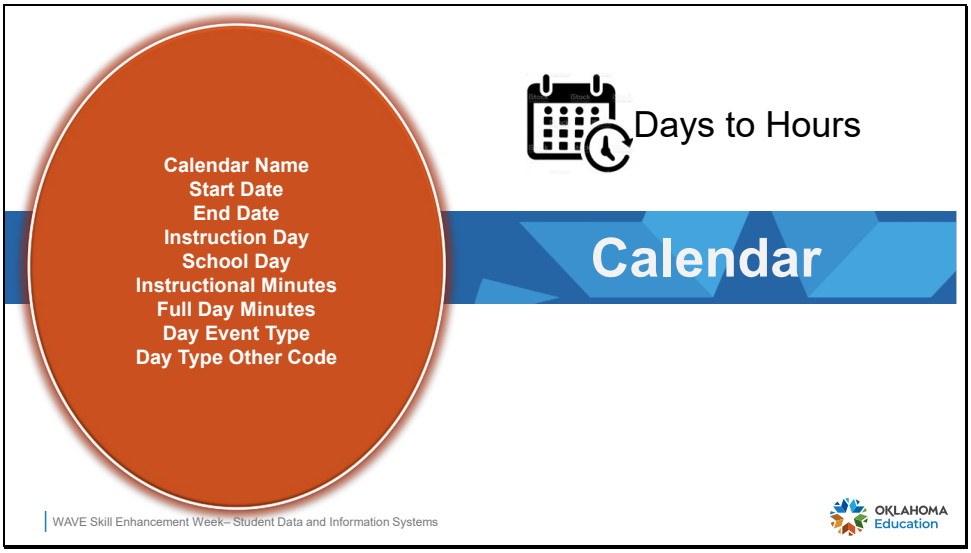



Select and open the FQSR, then select the specific school from the site list. Notice the report status of each school site:

- Not Started
- Open
- Confirmed
- Certified

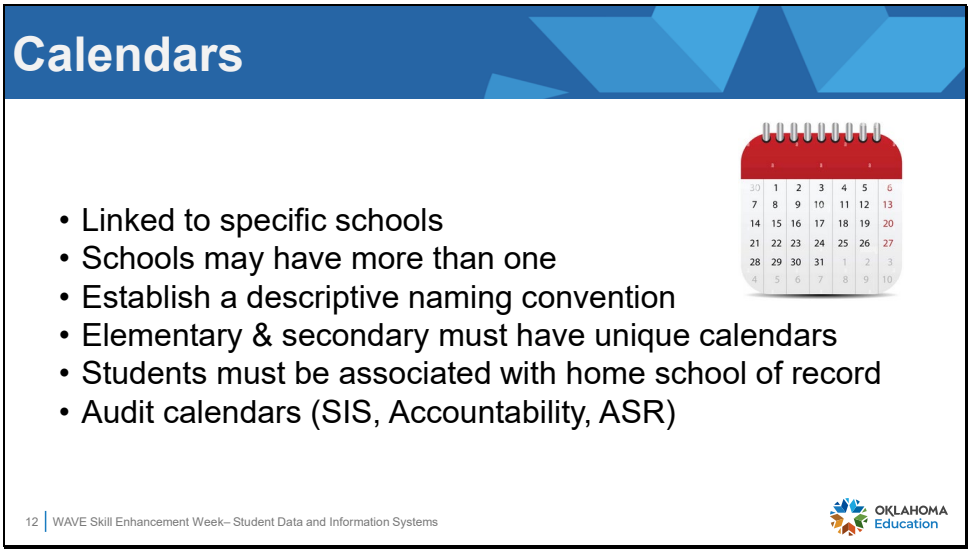
Buttons to the right of the site can be used to confirm or release a school. When the school is in a confirmed state, the report can no longer be updated to reflect changes from the student information system (SIS). The report remains locked when it is confirmed. The principal, or designated staff person responsible for confirming the school site also has the ability to release the report to update from the SIS when needed.

Slide 11




Calendars must be accurate for the correct display of student data in the FQSR.

Slide 12

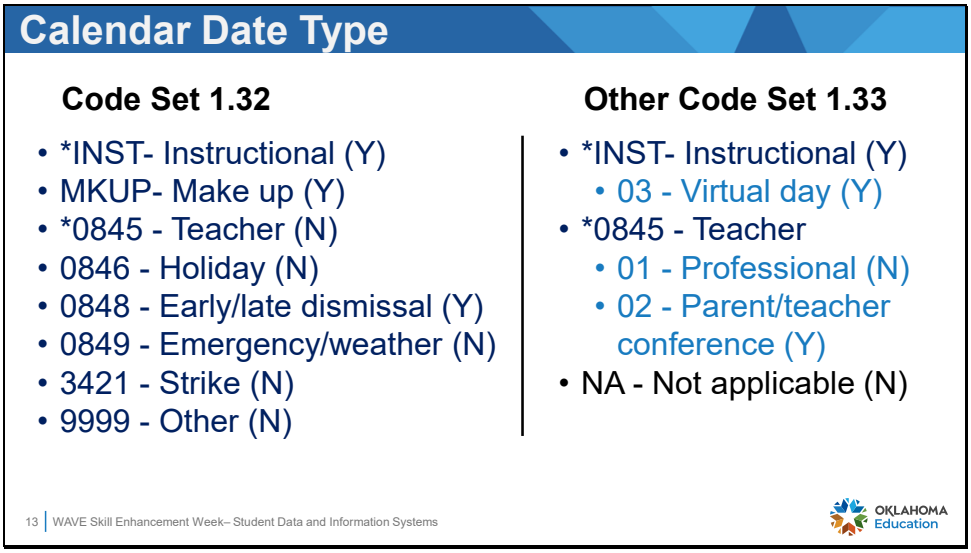



Calendars are the underlying foundation of student enrollment, attendance and transportation. It is important to understand the calendar process for the district's specific SIS vendor.

Calendars are linked to a specific school site. Some vendors limit one calendar to each school site, while other vendors allow a school to have one or more calendar. Both processes are fine as long as the calendar links to the correct school ID, or school state province ID.

Elementary schools (grades PK-8) and high schools (grades 9-12) cannot share the same calendars. There are different reporting requirements for these grade level students. All students must be associated with their school of membership and must be associated with the calendar for that school site as their "home" membership. For example, an 8th grader who may be taking classes at the high school, must have their home member associated with the school that serves 8th grade students. There are methods that will allow the student to be "concurrently" enrolled in another site that may be providing services to the student, but the student's **primary** or **home** membership must be the school of record and the student must report with that school and grade in state reports.

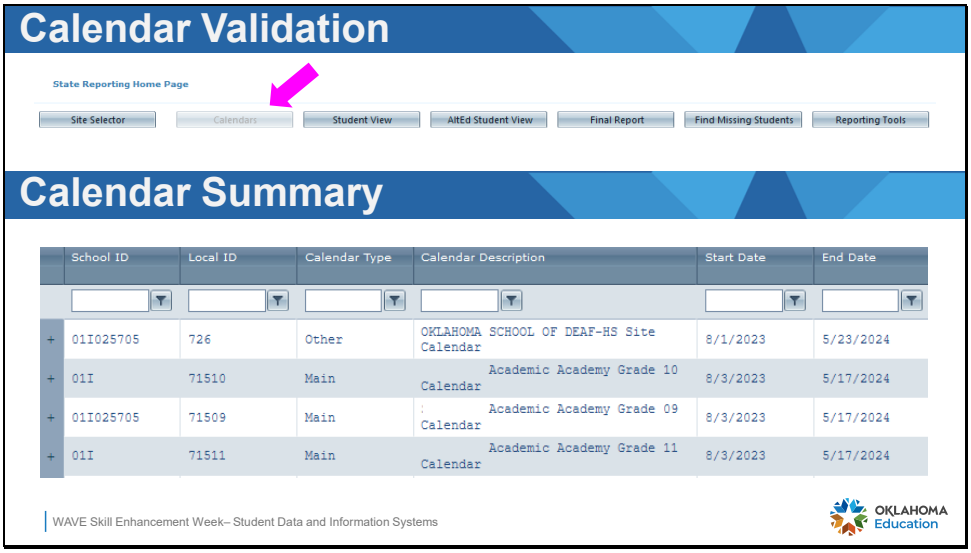
Slide 13




Calendars have global settings and day settings. Code sets 1.32 and 1.33 allow the districts to designate specific days on a school calendar that differ from a regular school day. Using the SIF codes as provided in this slide to create day events on the school calendar. Codes that reflect an instructional day are indicated with a (Y) and codes that will not count as a day of instruction are indicated by a (N).

Notice that a few codes require additional information in the form of an “other code”.

Slide 14

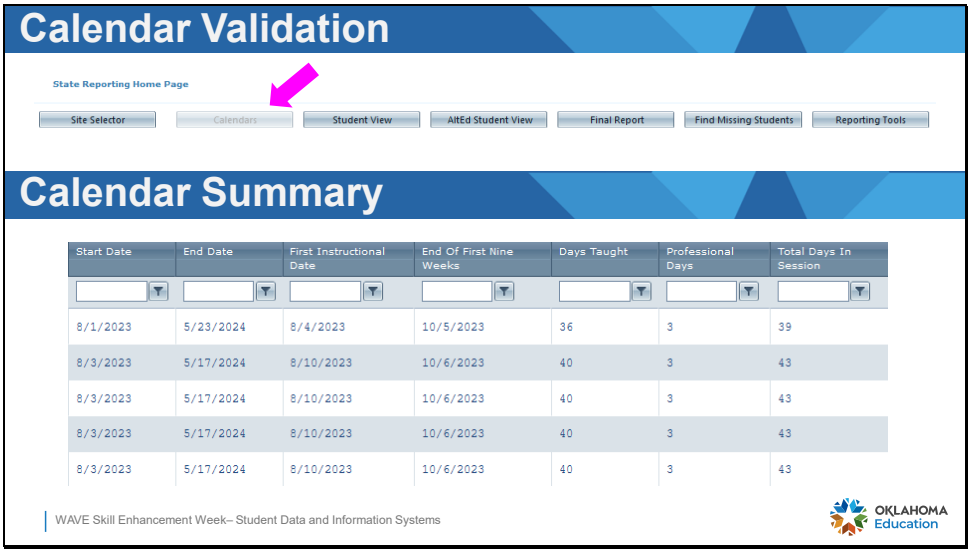



The calendar summary will display the name of the school calendar or a calendar type depending on the SIS vendor. If the calendar type is displayed, there may not be enough information for the district to easily identify the calendar, in which case the displayed Local ID of the calendar will be useful.

Select the Calendar tab from the FQSR menu options. Validate the accuracy of each listed calendar for the 1st quarter by:

- Confirming the calendar start and end dates

Slide 15




Continue to validate the additional calendar attributes by:

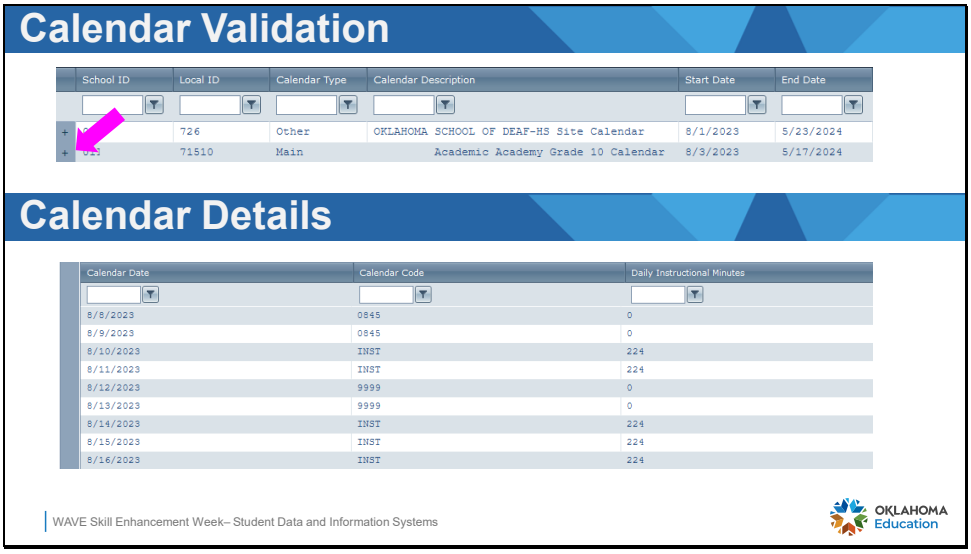
- Checking the 1st Instructional day
- Checking the date when the 1st Quarter, or 1st 9 weeks of school has ended
- Confirm the number of Days Taught
- Verify the number of Professional Days
- Confirm the Total Days in Session

The number of days taught + the number of professional days = the total days in session.

Evaluate each calendar in the list for consistency in each column or understand why there is a difference.

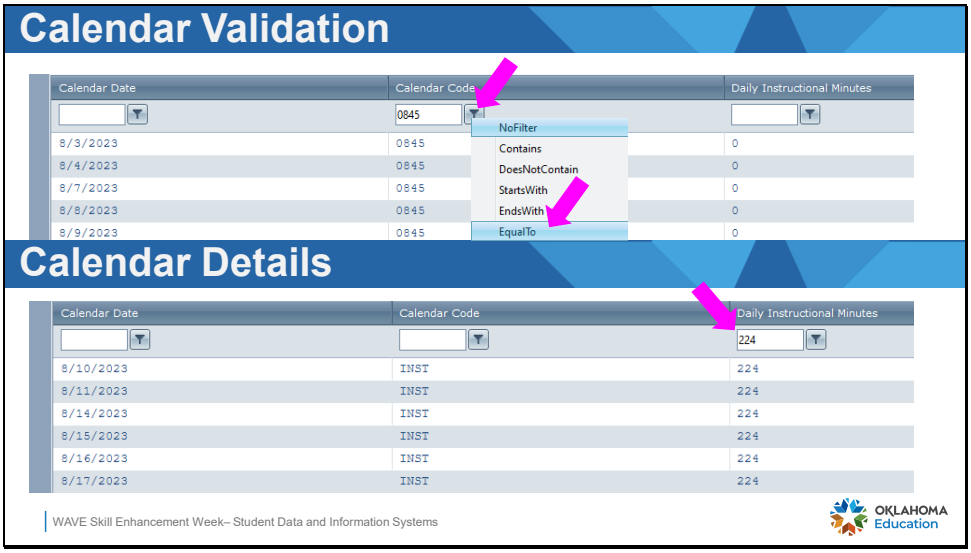
- An Alt Ed calendar may have a different number of days and instructional minutes, which may require a site exception.
- Calendars that reflect School for the Deaf or School for the Blind most likely will have a different number of days and instructional minutes, as these calendars must reflect the academic calendar for either of these schools.

Slide 16



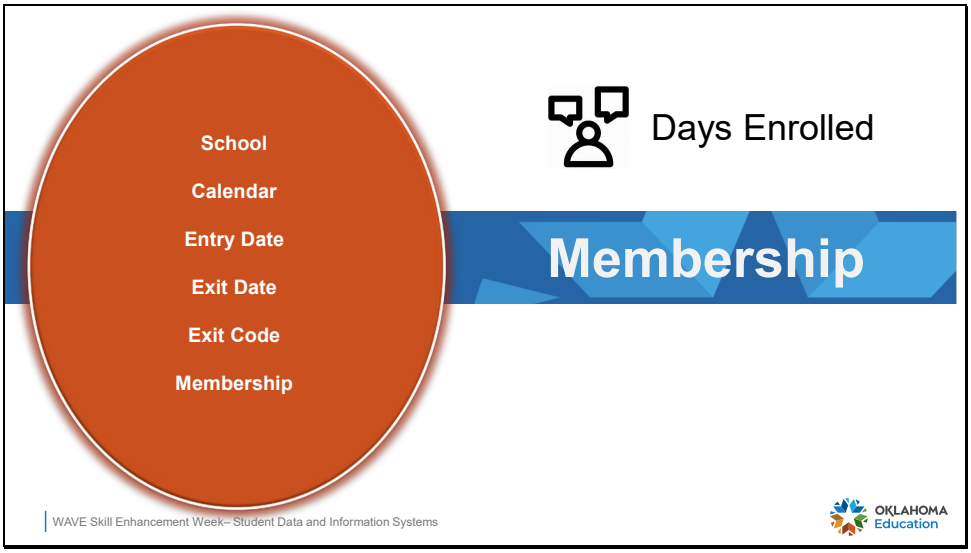

Click the plus sign to the left of a calendar in the summary to expand for a detailed view of each calendar day.

Slide 17




- Ensure each calendar day is reporting with the correct day code as listed in slide 13. Use the filter tools to perform checks for day types.
- Verify early release days or site wide distance learning/virtual days are documented with the correct day code.
- The data certified in the FQSR will be used to produce a Days to Hours report for accreditation beginning in SY2025.

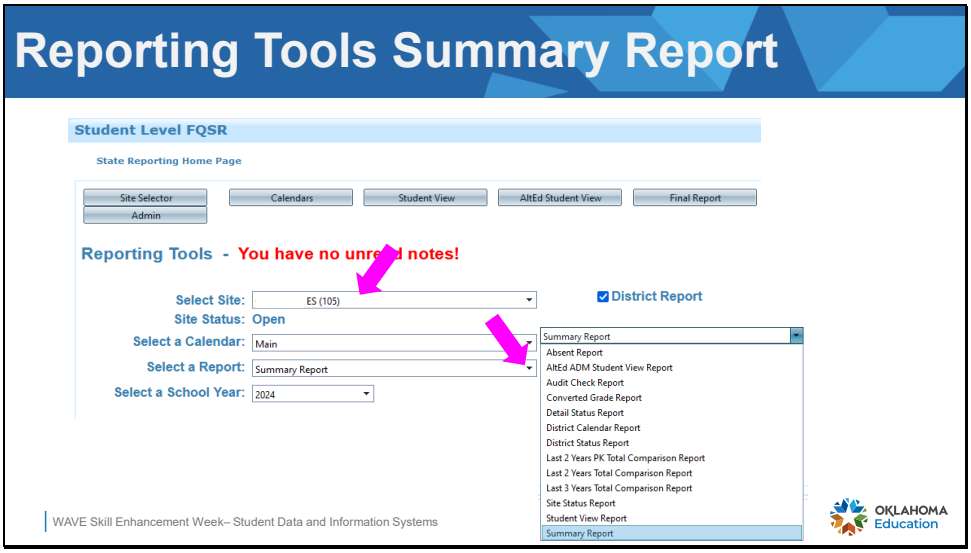
Slide 18




Membership, or student enrollment, is the total number of days in which the student belonged to the district. State Aid funding for a school is based on the combined Average Daily Membership (ADM) of all students in a school.

The Non-Full Academic Year (NFAY) status of a student on the School Report Card is determined via the enrollment records certified through this report. The NFAY calculation is dependent on the entry and exit dates for a student. A student is considered Full Academic Year (FAY) if the student enrolls within the first 20 instructional days of the school year and does not have a gap of 10 or more consecutive instructional days of enrollment prior to an applicable FAY end date.

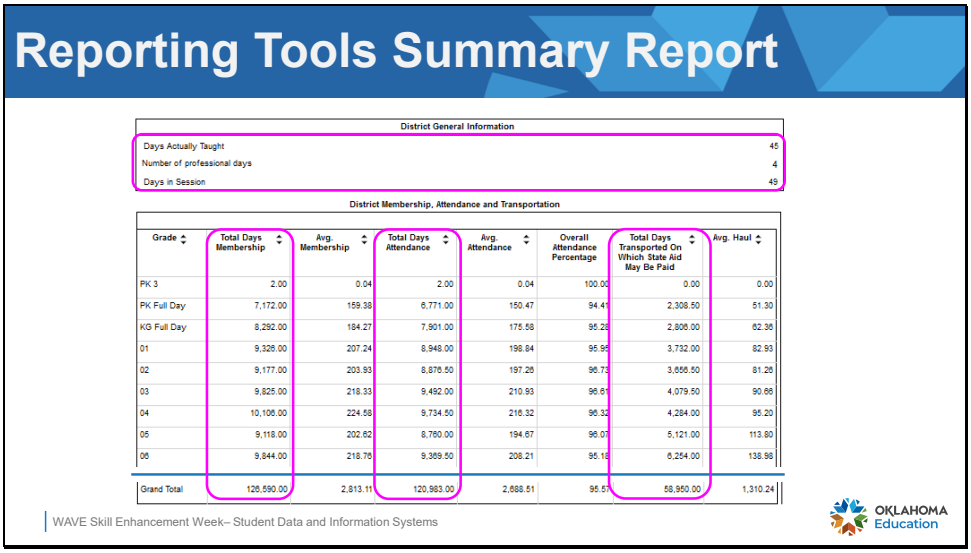
Slide 19




To begin working with the FQSR, it is most useful to start with the Summary Report.

Access the Reporting Tools tab. Check the District Report check box. Expand the Select a Report drop down list and choose the Summary report.

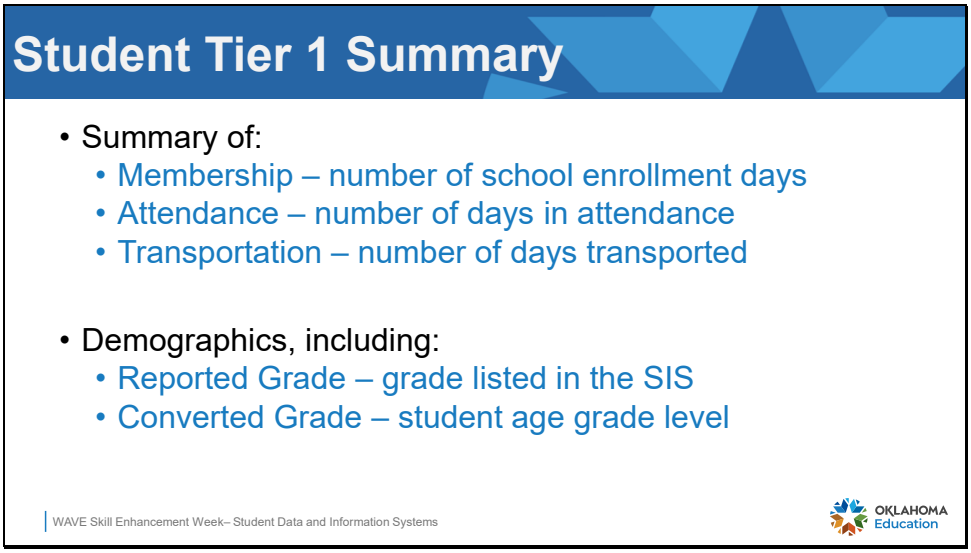
Slide 20




The Summary Report displays a grid view of the total for each reported grade and category. Compare the FQSR summary to the statistical or summary report provided by the SIS for state reporting. Each vendor may use a different name. As mentioned earlier in the presentation, knowledge of the SIS process specific to each vendor is very important.

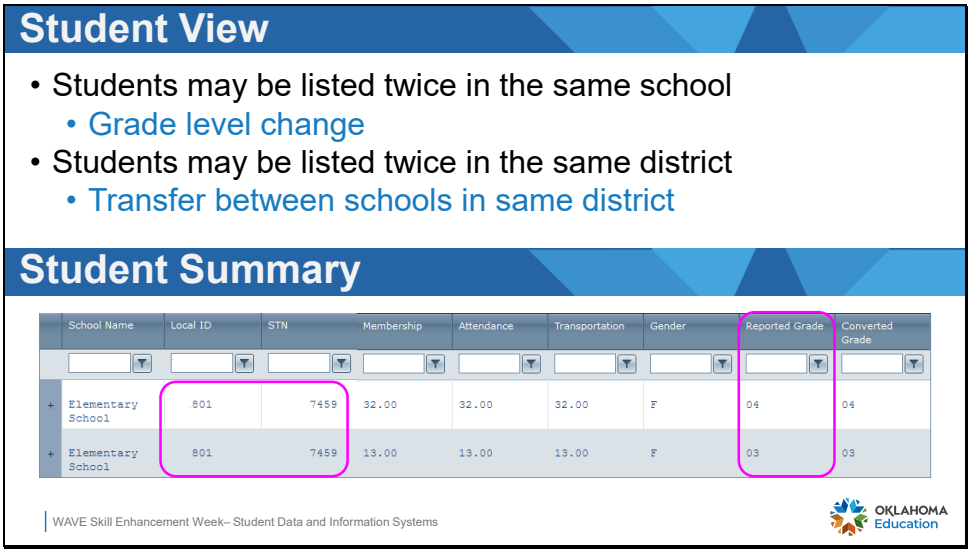
There are many ways to manage comparisons. One method is to use a spreadsheet to create a side-by-side grid to compare the FQSR grade level numbers to the SIS grade level numbers.

Slide 21




Understanding the report grid will enhance the user's ability to work with report data. The FQSR has 3 levels, or tiers, of student data. The default view is a summary display of each student and their days of membership, attendance, and transportation. In addition to the summary, some identifying student demographics are also displayed. Notice there are two grade columns displayed that represent the grade assigned by the school and the grade that is converted by OSDE based on the student's age.

Slide 22



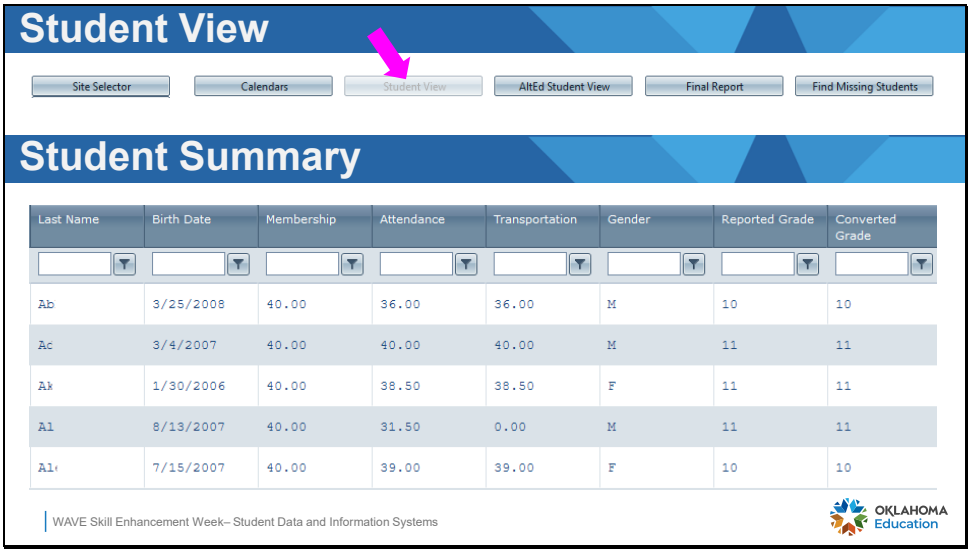

For example, a student would be considered "overage" if they began 1st grade at age 5. OSDE will convert the student's grade of 01 to KG for funding purposes. This will occur for any student who is overage in KG or 1st grade. If the student started school at:

- **three** years of age and reported in PK, then the converted grade is PK3.
- **four** years of age and reported in KG, then the converted grade is PK
- **five** years of age and reported in 1st grade, then the converted grade is KG.

Students may be reported in more than one grade if they were demoted or reclassified during the 1st quarter after school began.

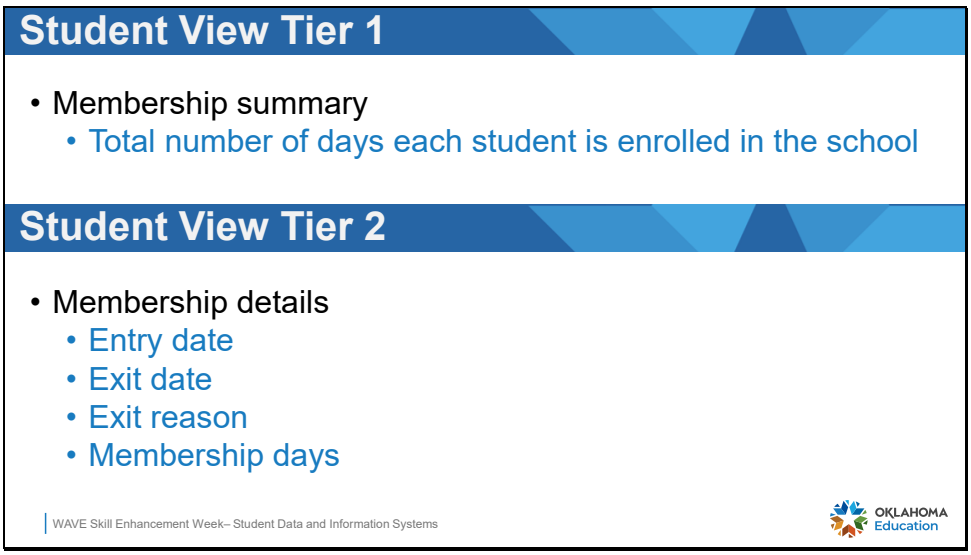
Students may be listed at more than one school they have moved between schools in the district

Slide 23



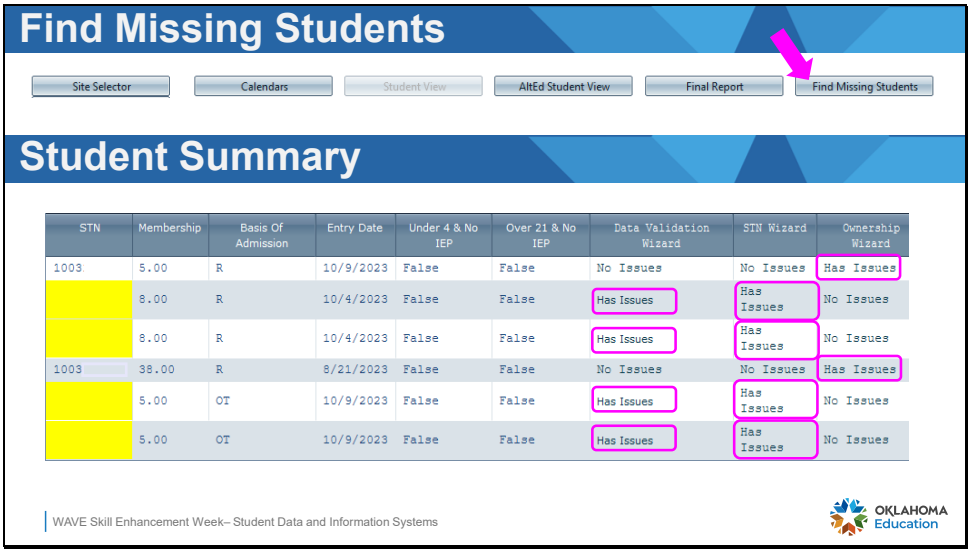

The FQSR defaults to the student view. The Student View tab is grayed out, identifying the current view in the student grid. The students listed in this report may be referred to as, “active this year” as opposed to the October 1 Consolidated Report which refers to students who are “active” on a given day

Slide 24




Membership Tier 1 level provides the total number of enrollment days for the student in the 1st quarter of school.
Membership details for each student are displayed in Tier 1.

Slide 25

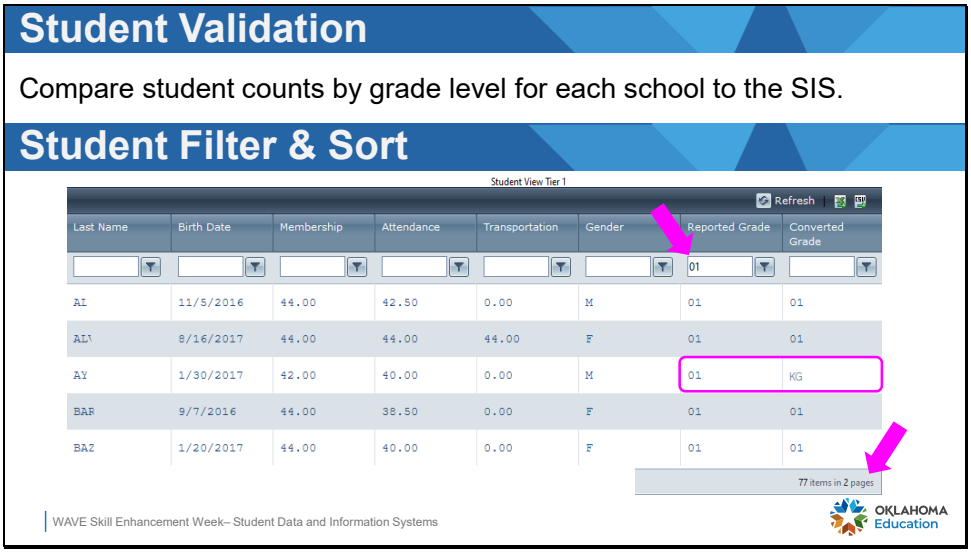



Use the Find Missing Students tab to locate any student that may be missing from the report.

Some students displayed in Missing Students are there because they do not belong in the report and should remain in the missing student list such as students with a basis of admission of PK3, Pre-ISP, or ACEPT.

Other students are missing from the report due to data quality issues which must be resolved. The highlighted cells in the grid will draw attention to the missing value. The columns on the right will direct the user to the data validation wizard to be used for correction of the error.

Slide 26

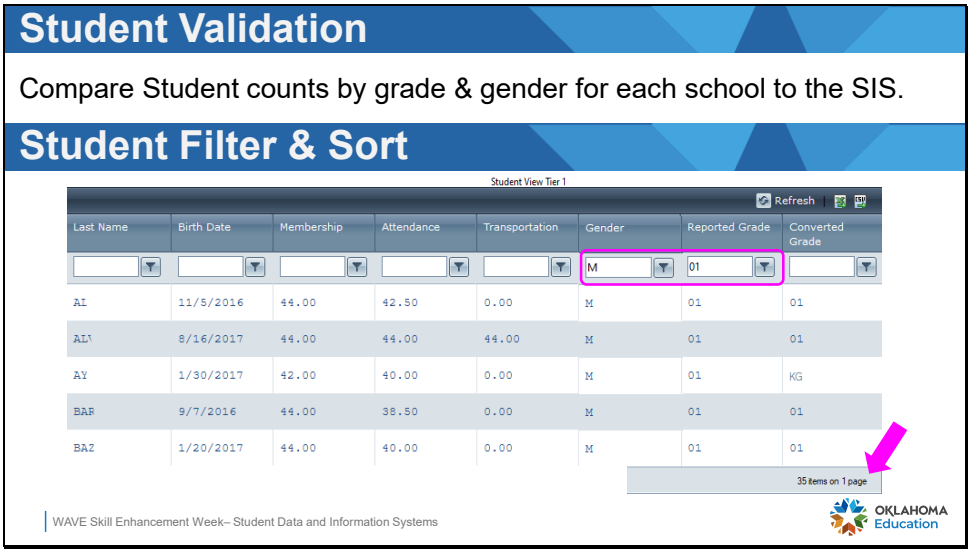



Membership validation begins with the summary reports as discussed earlier on slide 19 and 20. If the summaries do not match, then next step is to validate data in Tier 1, or the summary level. Filter the Reported Grade for one grade level at a time. Using the correct report from the SIS, compare the total number of students in the FQSR grid to the number of students in the SIS Statistical report.

- Each header may be sorted in ascending or descending order.
- A total count for the filtered selection will be displayed in the lower right corner of the student grid.

Again, users may find it useful to create a spreadsheet to document totals between the FQSR and the SIS to keep track of the validation process. The student grid may also be exported for easier manipulation. Districts with advanced technology staff may create other processes for comparing the FQSR to the SIS.

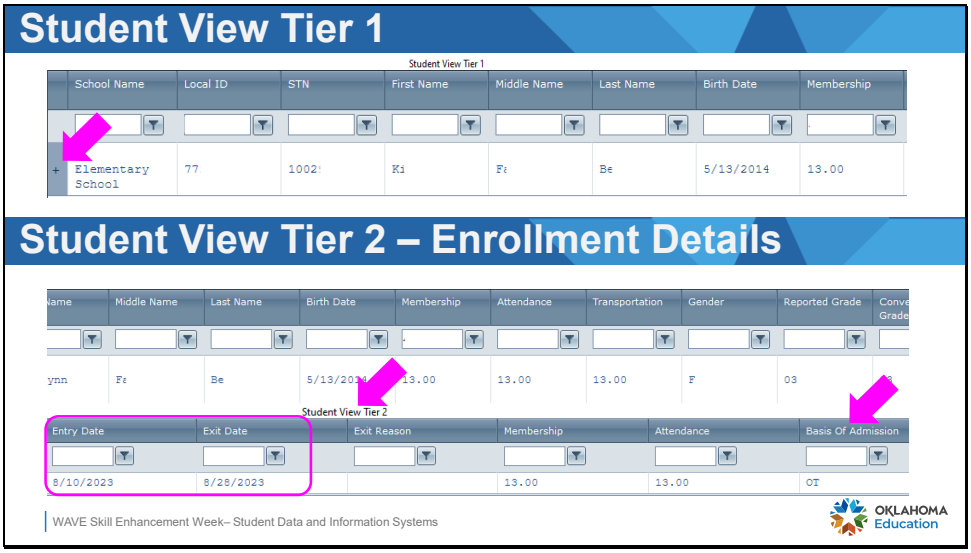
Slide 27




If the numbers do not match, compare by gender as well as grade level to help identity where the discrepancy may be. The filter and sorting tools in the grid will be helpful. It will become necessary to do a student-by-student comparison between the FQSR grid and a list of students in the SIS to identify any missing students.

When the students that are missing from the report are identified, the cause for the mismatched student must be determined and corrections made.

Slide 28

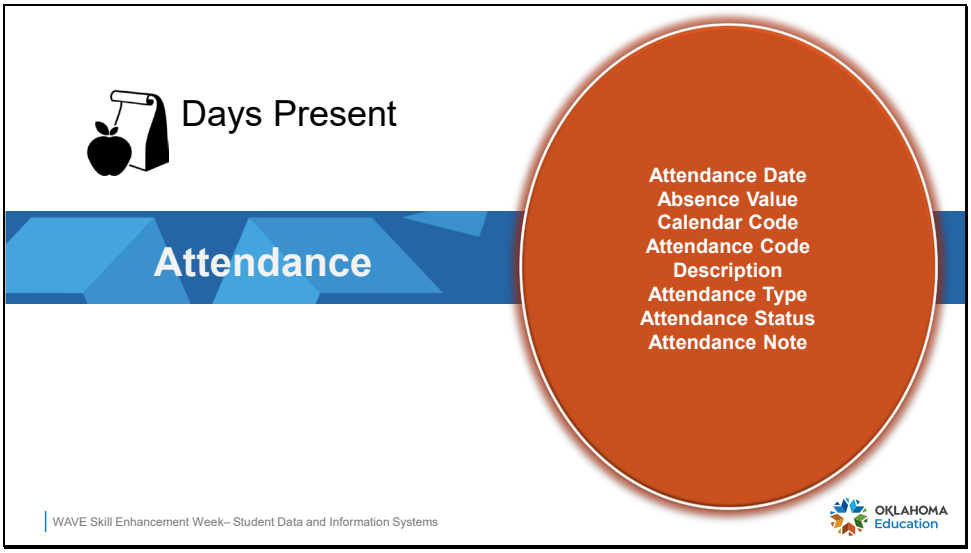



Click the plus sign to the left of the student in the tier 1 summary to open the student's membership details. View the enrollment details in tier 2 confirming the entry and exit dates with SIS enrollment records.

More than one calendar may be displayed depending on how they are used at the school. For example, a school may use one calendar to manage their virtual students, and another one to manage their brick 'n mortar students. Both calendars belong to the same school. Movement between the calendars will be reflected in tier 2.

The Exit Reason will not display for the FQSR but will for the ASR and support Accountability reporting.

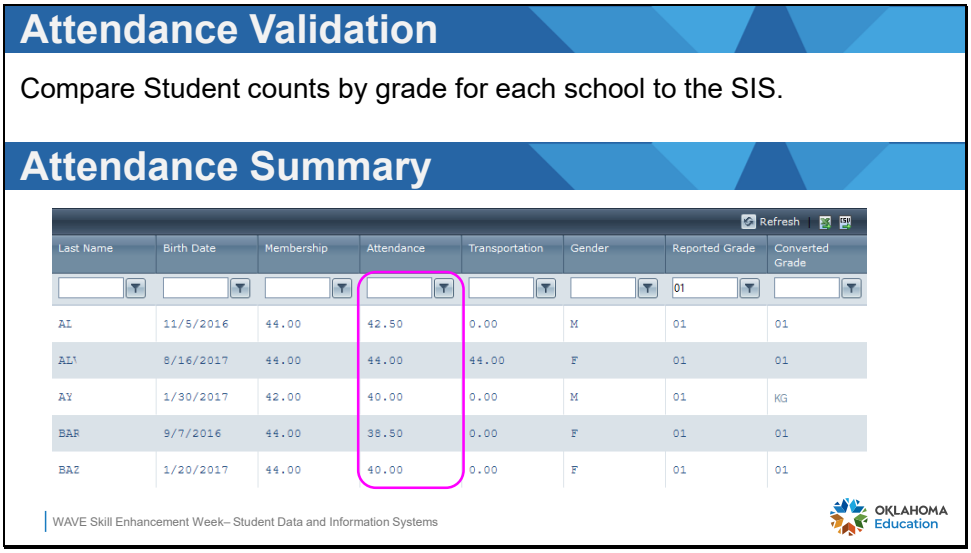
Slide 29




The student daily attendance (ADA) is used as a funding source.

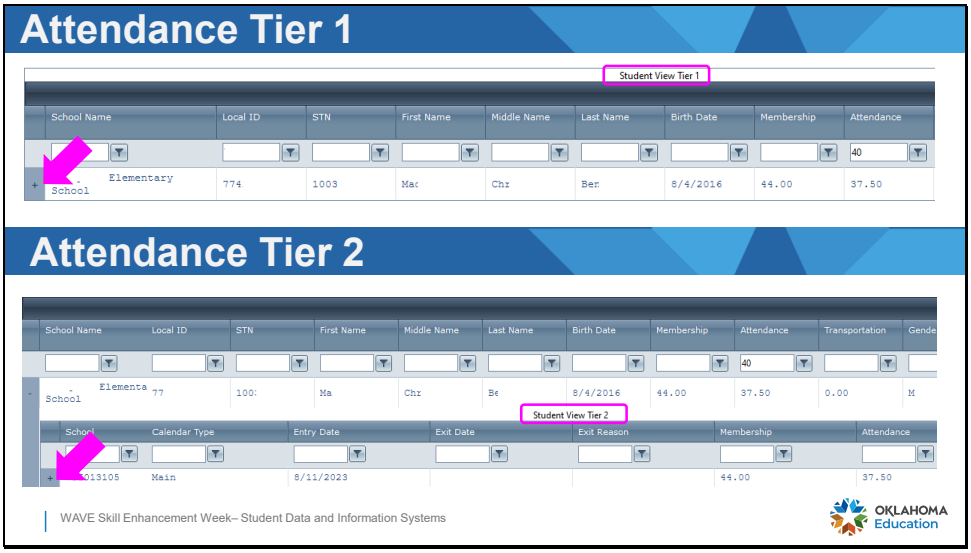
Accountability uses these certified attendance data for the identification of students considered chronically absent. A student is considered chronically absent if 10% or more instructional day are missed in a school year.

Slide 30




Validate attendance data similarly to the way membership was validated, starting with the overall grade level summaries references on slides 19 & 20. To validate further, use a report from the SIS to compare SIS attendance to the FQSR attendance. Use the filter tools to select 1 grade level and carefully validate the attendance summary value for each student. Missing students should have already been identified during membership validation process.

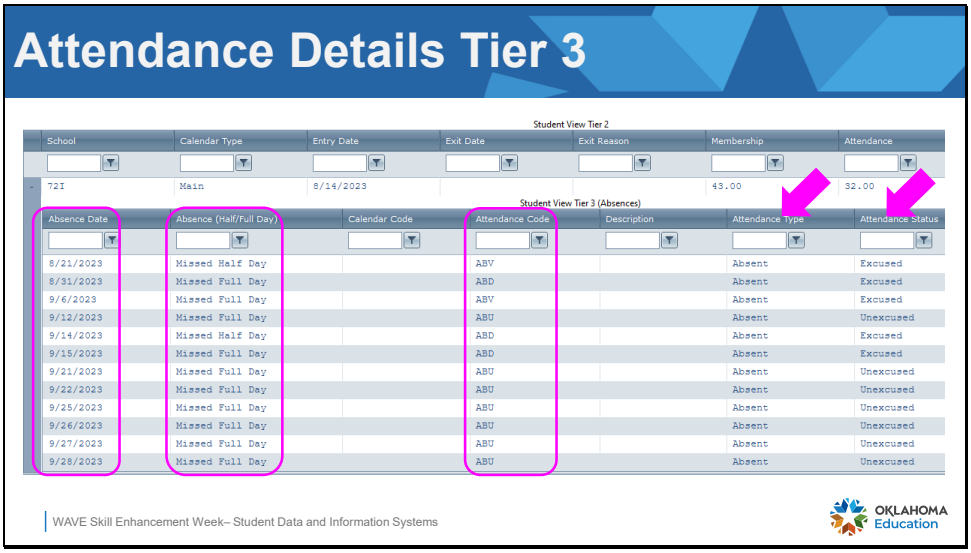
Slide 31




If student attendance summary values do not match:

- Click the plus sign to the left of the student in tier 1
- Click the plus sign to the left of the membership detail records in tier 2

Slide 32




Attendance details in tier 3 will display a list of all absences for the student. Compare absence dates and duration to the SIS attendance records for the student. Use the SIS attendance register report or SIS student attendance in the UI for validation.

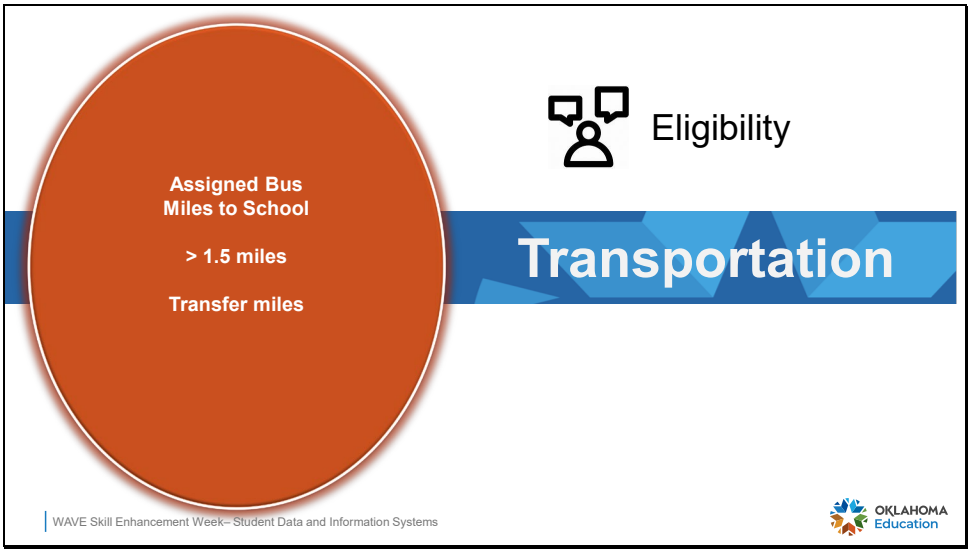
**Absence (Half/Full Day), Attendance Code, Description, Attendance Type, Attendance Status** are provided in AttendanceCodeInfo (SIF object), this links the date of absence to the school's attendance codes provided by the SIS to the Wave. OSDE only accepts the following to display on this report.

- 0.0, 0.5, or 1.0 absences
- absence values of 0.5 and 1.0

Attendance codes and descriptions are unique to each school, but must indicate absence type (absent, tardy, partial) and attendance status (excused, unexcused).

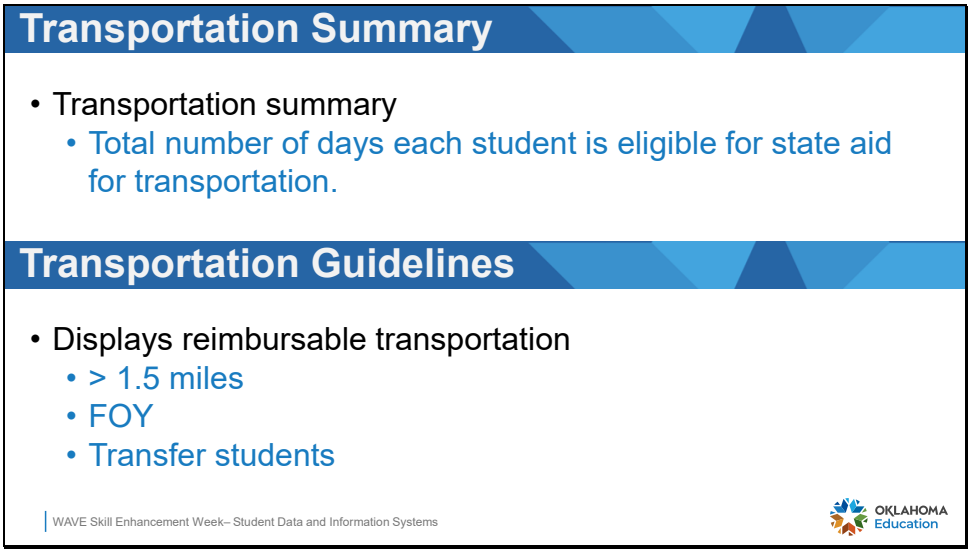
Recent absences may not be displayed in the details immediately until the 1st Q has ended. It Remember, it is a good practice to lock user access after the 1st quarter has been completed so attendance data remains static during the reporting period. That will force school users to reach out to the SIS administrator to make any required corrections.

Slide 33




Transpiration for eligible students is a funding source for districts.

Slide 34




Student transportation records should be created for every student who is eligible to ride a school bus. Eligibility is established by §70-9-101.

- Students who live outside of 1.5 miles of the school are eligible for state aid funding.
- Schools may transport students who live less than 1.5 mile from the school but will not receive state aid funding for doing so.
- Students who are eligible for transpiration and have moved out of the district (FOY) may continue to qualify for transportation for the remainder of the school year.
- Students who have transferred into the district are eligible for transportation within the district boundaries.

Slide 35

Only eligible transportation will be displayed in the student grid. Any missing student should have been resolved in the membership validation. Compare the transportation numbers in the summary to the SIS report for transportation as demonstrated on slides 19 & 20. Pay attention to the correct transportation code in the SIS report. Transportation overall numbers can be evaluated between the FQSR and the SIS. If the grade level totals do not match, a student-by-student comparison must be done to locate the student with mismatched values.

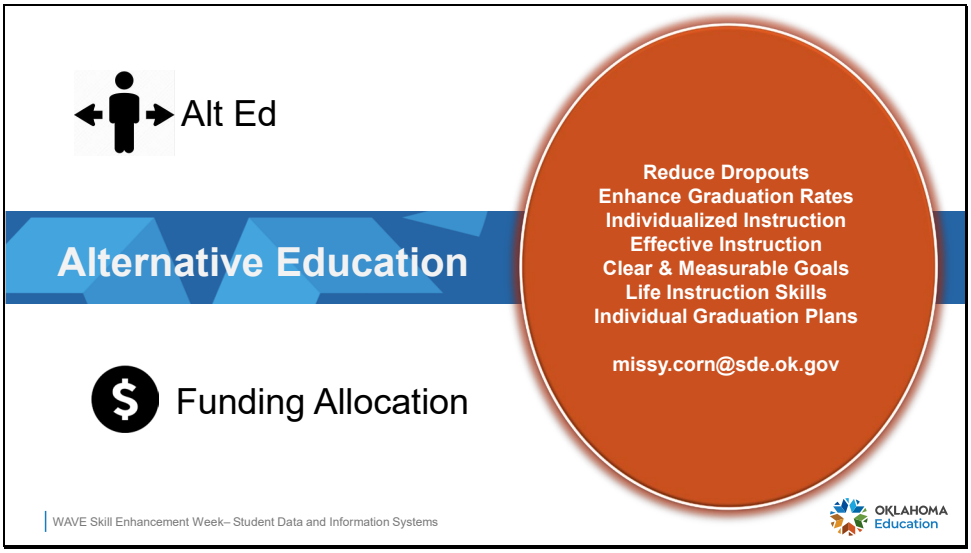
If the student has the same transportation record for the entire 1st quarter, the transportation numbers should match the attendance numbers. If transportation does not match attendance:

- Check the enrollment start date and end date and compare it to the transportation start date and end date in the SIS
- Verify the transportation record is coded correctly using the miles transported value
- Check the attendance details for accuracy
- Check the basis of admission for accuracy

If the student qualified for transportation eligibility after the start of school, the student's transportation summary will not match the attendance summary.

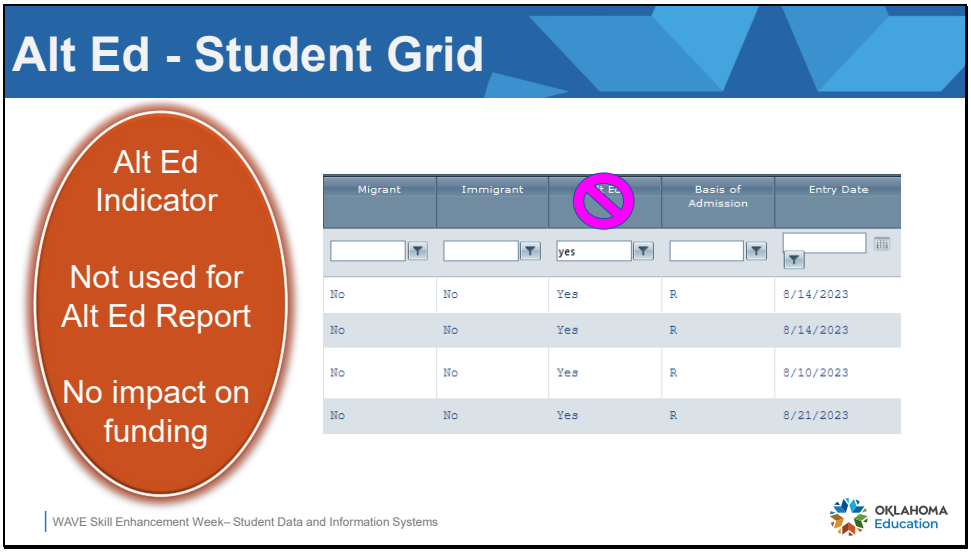
If the student moved within in the district and lost or gained transportation eligibility, the student's transportation summary will not match the attendance summary.

Slide 36



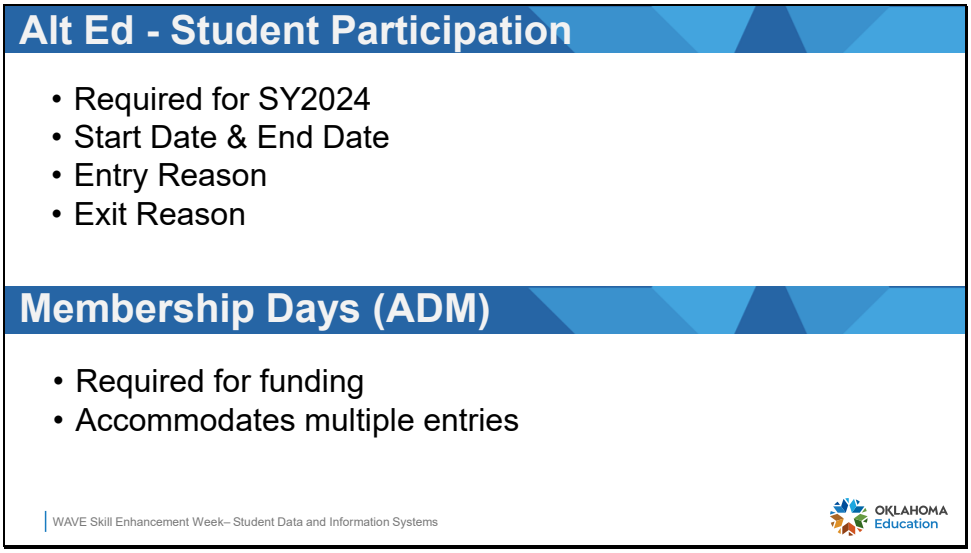

Students who are served in an alternative educational pathway in an approved program will qualify for funding.

Slide 37



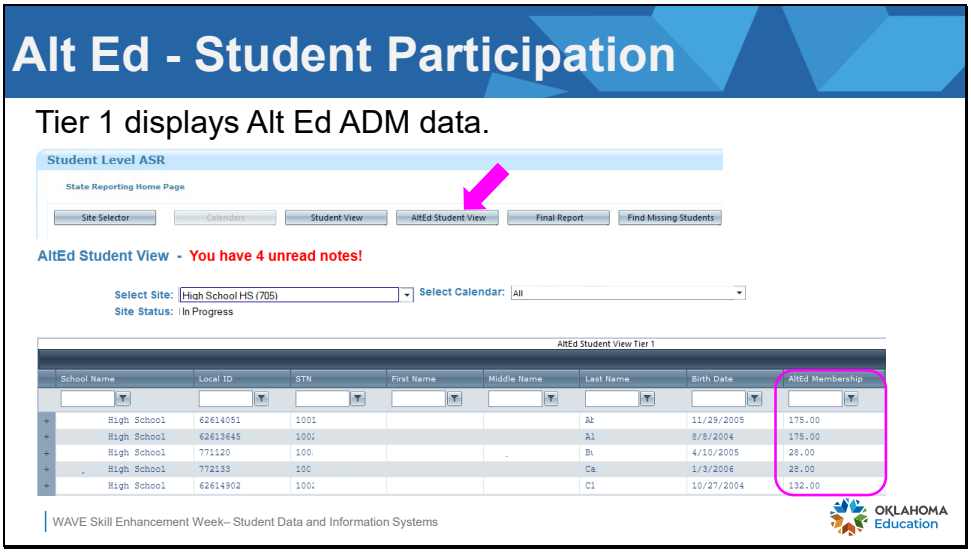

The Alternative Education student counts will no longer come from the data in the October 1 Consolidated Report. While the column is still present in the report, the data may or may not accurately reflect the number of Alt Ed students served in the district. The data displayed here is coming from a Student Personal Indicator, which many districts continue to use, but are not required to use. Continued used of this indicator is recommended as it will be helpful for districts to as a check and balance of their data. Even though the Alternative Education data for funding is no longer from this report, details about Alternative Education will be presented in the following slides to assist in preparation of this student count.

Slide 38




The reporting requirement for alternative education students has been changed by law. Students must now report the number of days in which they enroll, or participate, in the Alternative Education Program of a school. Students must now have a Student Participation record for alternatively served students with entry and exit dates reflecting a total number of participation days within a school  year. Vendors may refer to this as a “program” in the SIS. Contact the school’s SIS vendor for specific guidance creating student participation records for each student.

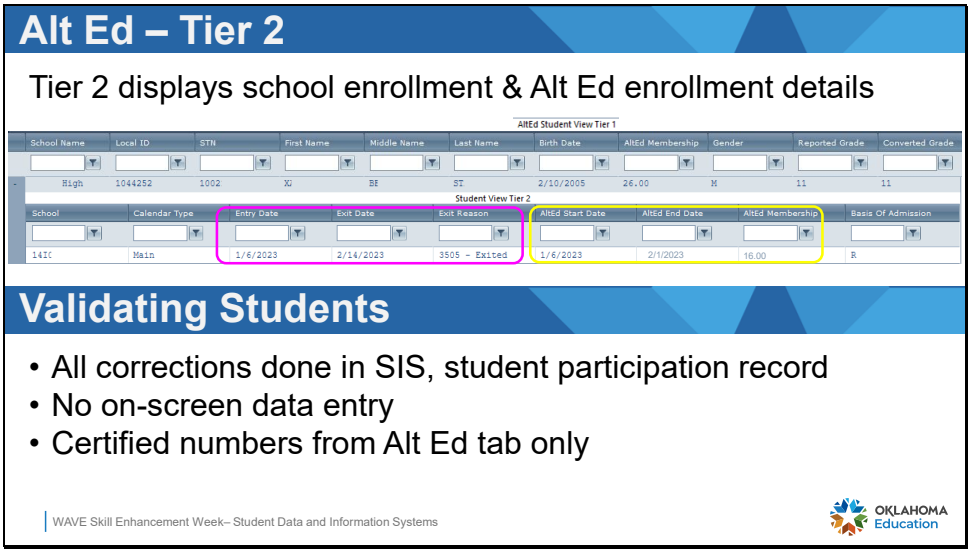
Slide 39




Alternative education students are displayed in the FQSR and ASR reports. The First Quarter Statistical Report (FQSR) is due 10 days after the end of the 1st 9 weeks of school. The Alt Ed information is for review purposes only in the FQSR but will be certified for funding in the ASR due 10 days after the last day of school.

Alt Ed students are located from the AltEd Student View tab. The AltEd Student View Tier 1 displays a summary of students with a Student Participation record and the total number of days the student has participated in the program to date.

Slide 40



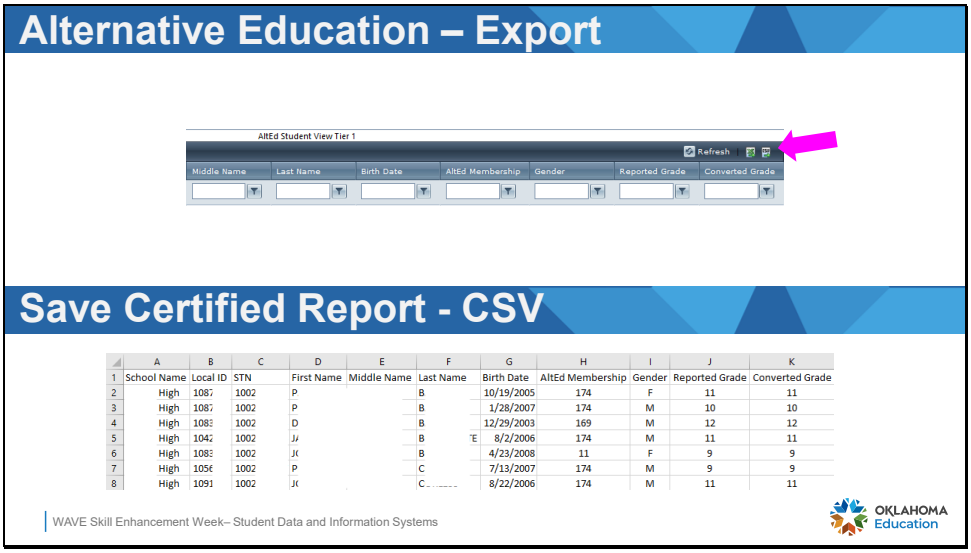

Expand the summary view of a student by clicking the "+" sign to the left of the student's row. This action will open the Student View Tier 2, which displays:

- the school enrollment entry and exit date,
- the Alt Ed program entry and exit date.

These entry and exit dates will be different if the student has moved in and out of the Alt Ed program while enrolled at the same school. If dates are not accurate, corrections must be made in the student's participation record in the SIS. There is no onscreen data entry.

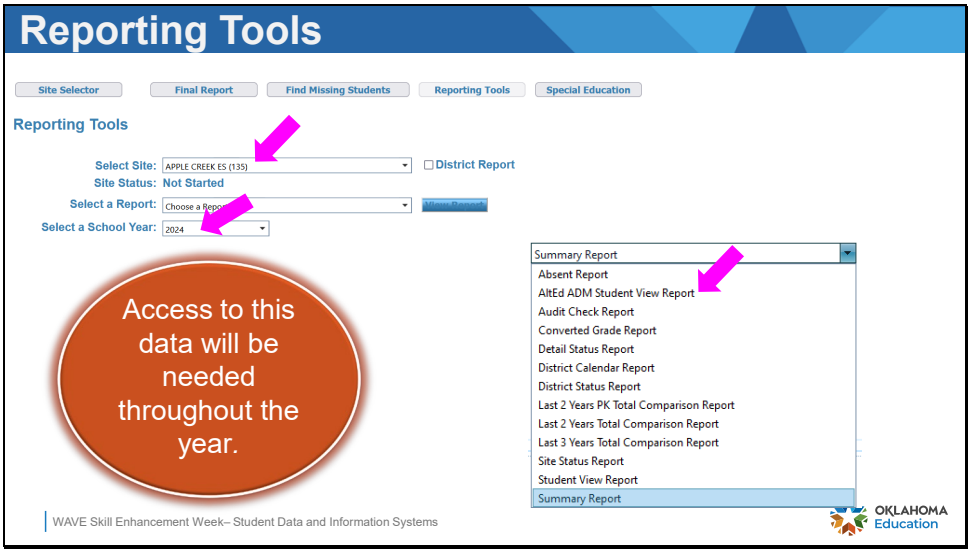
Only students reported in the AltEd Student View tab will be included in the ASR certified report. No corrections to Alt Ed student counts will be made after the ASR due date. Alt Ed data that is certified by the superintendent will be used for Alt Ed funding allocations.

Slide 41




An effective method for capturing report student counts for Alt Ed is exporting a CSV file from the Alt Ed Student View Tier 1.

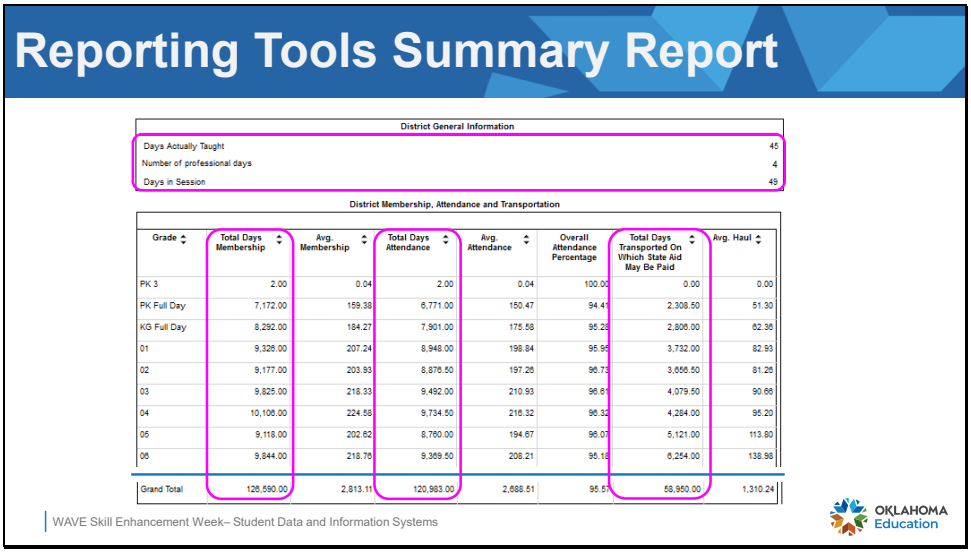
Slide 42




The Reporting Tools may be used at any time to assist with the validation of the report. It is strongly recommended that school level and district wide reports be saved locally. Reports that are specific to programs within the district should be sent to program directors to assist with additional reporting within SSO.

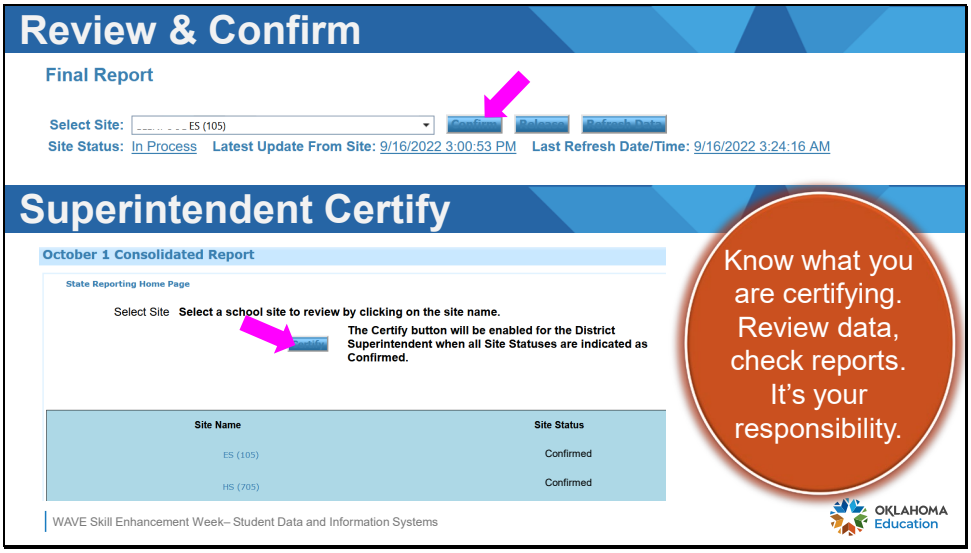
The certified student counts in these reports will be useful for various data requests a district may receive throughout the school year, including Accreditation and ROA audits.

Slide 43




The Summary Report will be required during the FQSR audit with the district's RAO

Slide 44

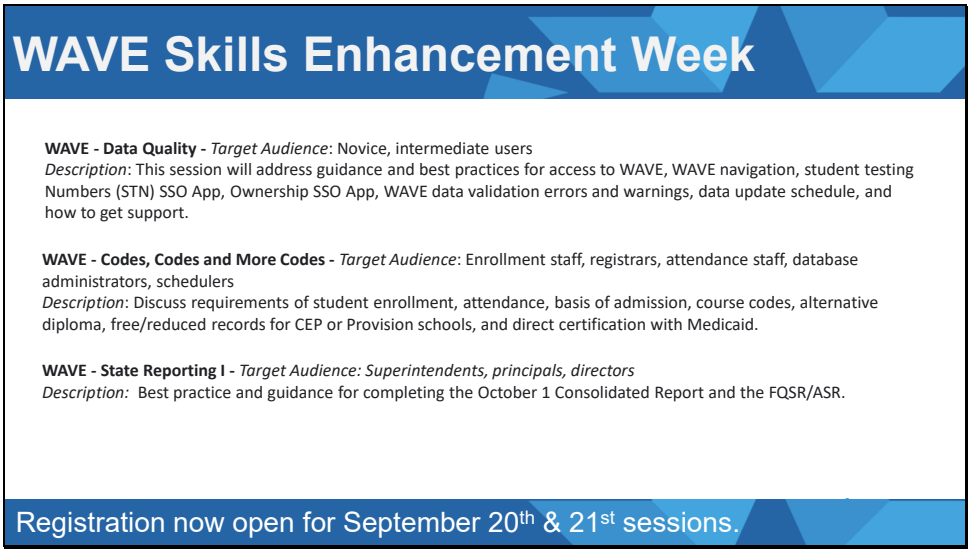



The designated staff person will confirm the school level report after all student counts for all demographics and attributes have been validated as correct by clicking the **Confirm** button for the school site as shown in the top portion of this slide. A school site that is in the confirmed state is locked, or frozen for that point in time. The report will no longer update with any changes from the SIS. If an update needs to be made, the designated staff person has the ability to release the confirmed status and allow data to once again flow from the SIS. The confirmed status may not be released by designated staff  when the report certified.

The superintendent is responsible for certifying that the data in the report for each school in the district is complete and accurate. The **Certify** button is accessible only by the superintendent as shown in the lower portion of the slide. The action of certifying data in a report communicates to the state that the superintendent is knowledgeable of the data that is received by the state, is attesting that the data is complete and accurate, and the numbers reported are ready for any funding allocations.

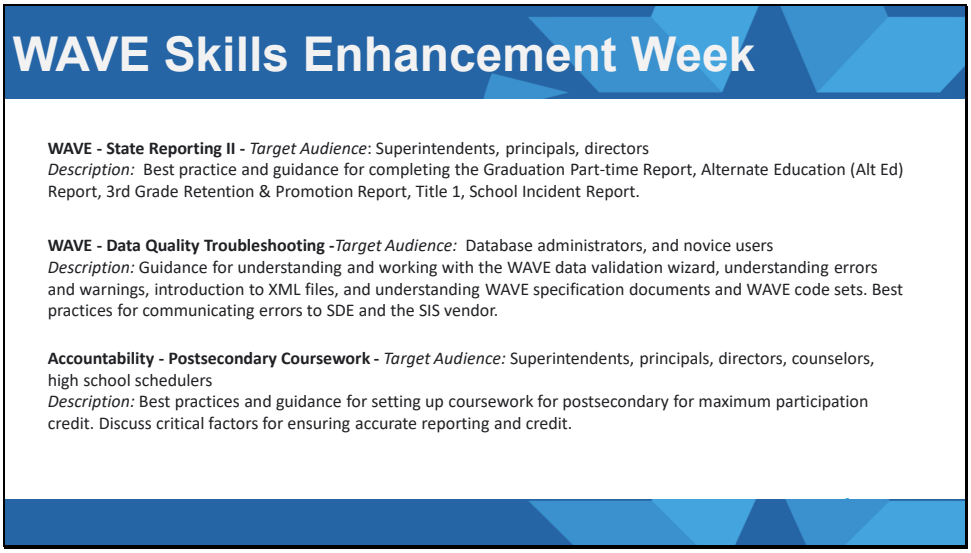
Corrections that need to be made before the due date may be done by contacting OSDE to open a certified report. Corrections to reported numbers in the report cannot be made after the due date.

Slide 45




OSDE offers 50-minute virtual training session in August and September to equip staff in their roles with student data and state reporting. Participation in the training sessions improve data quality, reporting accuracy, and accurate funding for the district.

Slide 46

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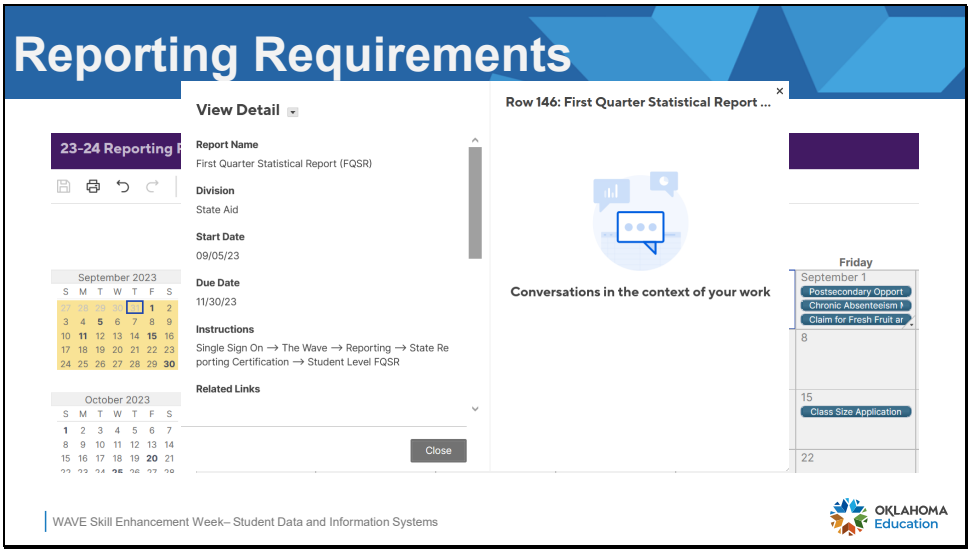
Slide 47

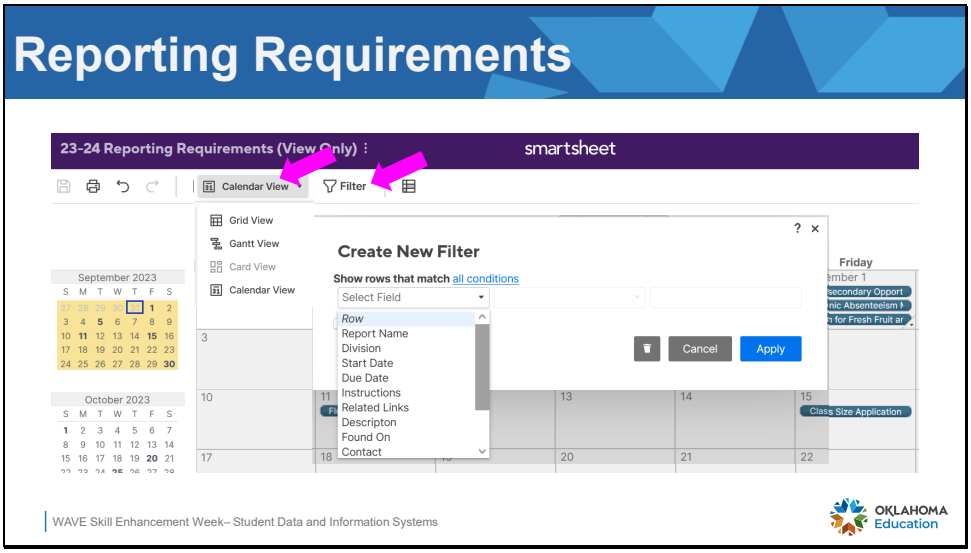



OSDE has a published calendar on the website for all state reporting requirements that occur during the school year. The data is in the form of a Smartsheet. The user may:

- Select the month to review,
- Click on a report title in the calendar to open for details,
- Change the calendar view,
- Filter the calendar based on parameters.

OSDE also has links on the website to access the reporting requirements in an excel spreadsheet or subscribe to a Google or Outlook calendar.

Slide 48

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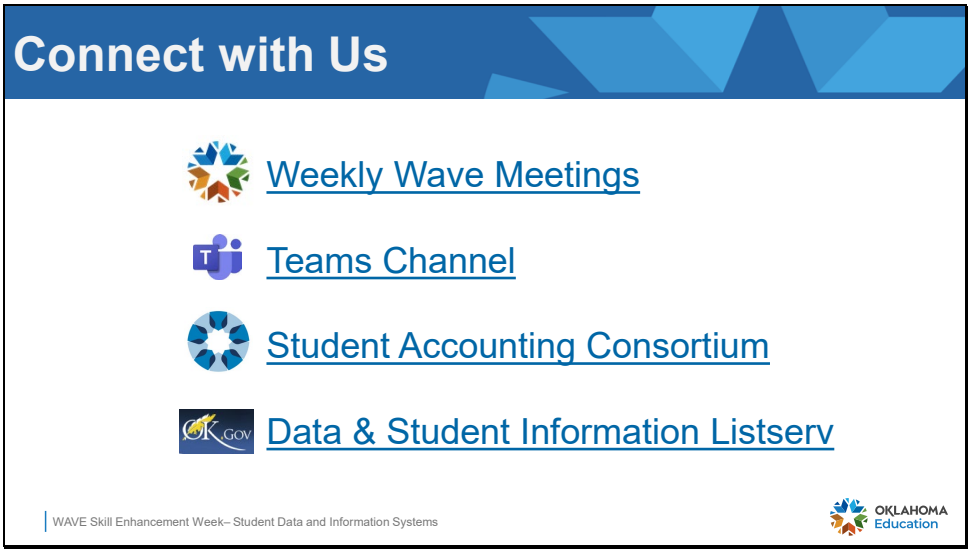
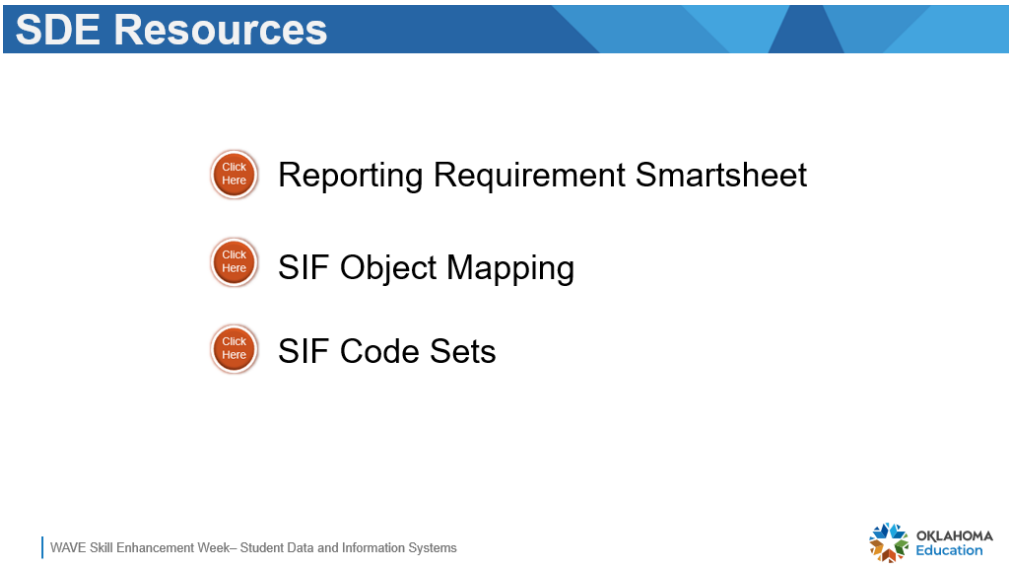
Slide 49




Communication is a key factor in keeping staff connected and “in the know.”

- Weekly Wave Meetings occur on Tuesdays at 10:00. Use the link in the slide to register for this weekly event.
- The Data & Information Department (DIS) encourages district users to connect to our Team channel to locate valuable resources and easy chat access to the DIS team.
- The Student Accounting Consortium meets on the 1st Monday of each month with topics expanding beyond WAVE. Use the link in the slide to request membership in this consortium.
- Subscribe to receive newsletters and email communication from various OSDE departments with the link provided in the slide. It is recommended that users subscribe to the following:
    - Data & Student Information
    - Accountability Reporting
    - Admin Newsletter

Slide 50




Use the links in the slide to quickly access the listed documents.

Reporting Requirement Smartsheet
SIF Object Mapping
SIF Code Set