STISETSWeb – Utilities

Utilities Desktop

The **Utility Desktop** houses several options that enhance the operation of the software. STISETSWeb has a *System File* option located under Utility Desktop. It is recommended that only one user have access to the STISETSWeb System File. This area of the program should be kept under high security and edited prior to the first day of school or before using the STISETSWeb program.

Utilities Desktop | System File

The *System File* has five tabs for setting up the system: *Daily Student Update*, *Command Engine*, *Security Policy Settings*, *Other Settings* and *Office Integration*.

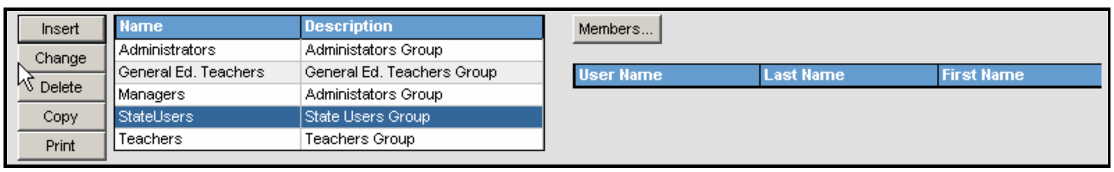
- **Daily Student Update**: Before running the first nightly upload, STI recommends removing the check from the *Create Gen Ed Caseload* box, which will be checked by default. This checkbox is located in the *Daily Student Update* tab. Click **Save** to save the change.
  - Scheduled Student Update: This box must be checked for the STIOffice demographic data to update every night.
  - Create Gen. Ed. Caseload: This tab is used to create General Education teacher names and eventually provides the ability to access the STISETSWeb program. It is recommended that the user NOT check this box for now.
  - Scheduled Time: The administrator must set a scheduled time each day for the student STIOffice demographic data to update in STISETSWeb. The time set must be AFTER STIDistrict (*Daisi* import) uploads are complete.
- **Command Engine:** This tab is used to manage report ordering using job queues.
- **Security Policy Settings Tab**: This tab is used to maintain passwords on an administrative level. The following options may be edited here:
  - Password Expiration Days: This allows for a password to expire in a given number of days. In a typical setup, the system will require that a user change his/her password every 30 to 90 days.
  - Remembered Passwords: This is a setting that allows several previously used passwords to be remembered. Users cannot use a password more than once.
  - Lock Out Minutes: This is the number of minutes a user can attempt to sign on. If a user tries to log on unsuccessfully for this amount of time, the account will be locked. An administrator will have to unlock the account.
  - Lock Out Threshold: This is the number of times a user can attempt to log in with an incorrect password. If someone tries to log in unsuccessfully this number of times, it will lock the account. The administrator will have to unlock the account.

- **Other Settings:**
    - <u>Show Student SSN</u>: The district must determine whether student Social Security Numbers are to display within the student folder. Check the *Show Student SSN* box to display Social Security Numbers. These numbers will only be seen in the Student Folder on the *Services* tab.
    - <u>Inactivity Timeout</u>: Inactivity logout time may be set here, up to 15 minutes. If the workstation remains inactive for this length of time, the user will automatically be logged out.
    - <u>Child Count Date</u>: Enter the appropriate Child Count date (generally recognized as December 1st) in the Child Count Date field. Select the *Save Tab* feature to save the date in the program.
- **Office Integration Tab:** This tab is a support tool for Administrators to manage each school's Office Integration service. This tab displays the school, school number, the date on which Office Integration was last run, and the name of the computer hosting the Office Integration service.

Defining Security Groups

The security model for STISETSWeb is very robust, allowing administrator to set security assignment for employees who serve students in multiple schools. This will enable speech therapists, gifted teachers, etc., to access their caseloads from one login. After initial security groups have been assigned, supervisors will have the option to add or remove rights as needed for individual employees. Since student-by-student security assignment is allowed, supervisors have many options available for securing confidentiality of student records.

Security groups are defined by the user's level of access to the program. The administrator may view *Groups*, *Users in each Group* and *Group Set-Up*. As shown below, as a group is highlighted in the left box, the users in the selected group are displayed in the right box.



(NOTE: IF USERS ARE NOT ASSIGNED SECURITY GROUPS, THEY WILL HAVE <u>NO</u> OPTIONS UPON LOGGING INTO THE PROGRAM.)

Security Groups are pre-installed in the software. These vary from state to state. The most common groups are as follows:

- **<u>Managers</u>**: Employees assigned to this security group have full access to the software for managing records in their school only. Managers have full access over student records and managing the STISETSWeb software in their school.
- **<u>Teachers</u>**: This security group was designed for classroom teachers, providing the ability to manage all students in the teacher's caseload. Whether employees serve in the capacity of case manager, related service provider, special education teacher, psychometrist, etc., all student records may be managed from one work area.
- **<u>General Ed. Teachers</u>**: This group will be created if the *Create Gen Ed Teachers* box was checked in the *System File*. This Group has read-only rights by default.
- **<u>Administrators</u>**: Administrators have full user access for all schools in the district. Typically, board office personnel would be assigned this security group.
- **<u>Medicaid</u>**: Employees assigned to this security group have full access to the Medicaid Desktop.
- **<u>State Users</u>**: Assignment of this *Security Group* allows view-only access to the program. Typically, State Department Representatives would be assigned to this group.

Security Group Edit Commands

The following options may be helpful when working with security groups:

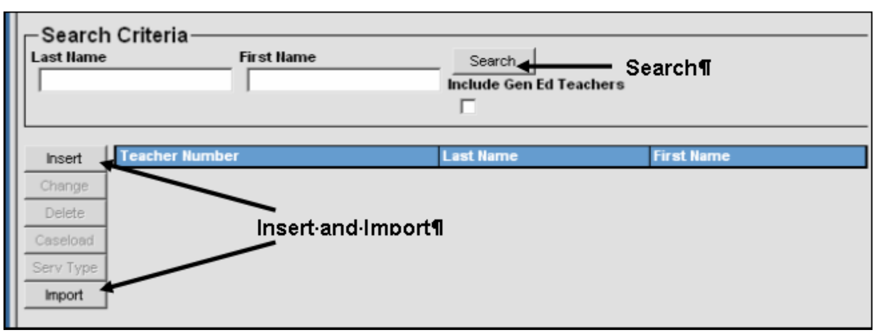
- **Insert**: Insert new security role names and descriptions.
- **Change:** Change the name and the description of security roles.
- **Delete:** Delete a security role from the list.
- **Copy**: Create a duplicate of the group selected. In creating a new group, a user may look at the existing groups and determine which group has rights that are most similar to the group to be created. In this case, select a group and click the **Copy** button to copy the current permissions from the model group. Then rename the new group.
- **Print**: Print the effective permissions for a selected group. To view the current rights for a group, select the group and click the **Print** button.
- **Members**: Add or remove users from the highlighted Security Group list, or view the current members of a selected group.

Other Security Group Items

- **Effective Permissions**: A tool for viewing individual user permissions. No modifications to permissions are allowed from this menu option.
- **Edit Permissions**: A tool for locking down and editing permissions for entire groups of users. This will allow the System Administrator to edit the permissions of a particular group more precisely.
- **Object Types**: Three different classifications of security in STISETSWeb.
- **Groups**: Group whose permissions are to be viewed. For more information on this, please refer to the *STISETSWeb User Manual*, available for download under **Documentation | User Manuals** on the STI Support site at http://support.sti-k12.com/documentation/default.asp (user name and password required).

Building Employee File

New employee information may be entered in the software in one of two ways. Begin by expanding the Utilities Desktop. The options that are available are shown below.



- Verify that the teacher does not exist in the system by **Searching** for the employee before inserting a new record or **Importing** a teacher.
- To import an employee, click **Import**. This will copy information from the employee file that has been uploaded to the District database from the local school STIOffice program. Since demographic information will be automatically copied over, this option will save time.
  - After clicking **Import**, search for the employee by entering the *Teacher Number*, *Last Name* or *First Name*.

- Once the desired employee's name has been highlighted, click **OK**.

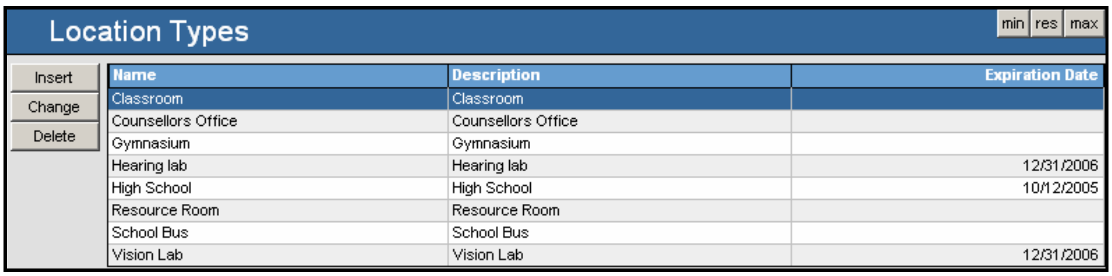
- To add new employees who do not exist in the local school employee file, click the **Insert** button. After clicking **Insert**, complete the appropriate information and click **OK** to save the information.

Defining Codes

The *Code Desktop* houses all the codes used in the software; i.e., all codes displayed in drop-down lists throughout the program.

Location Codes

Location codes are used with Services. This will populate the drop-down list for *Service Locations*.



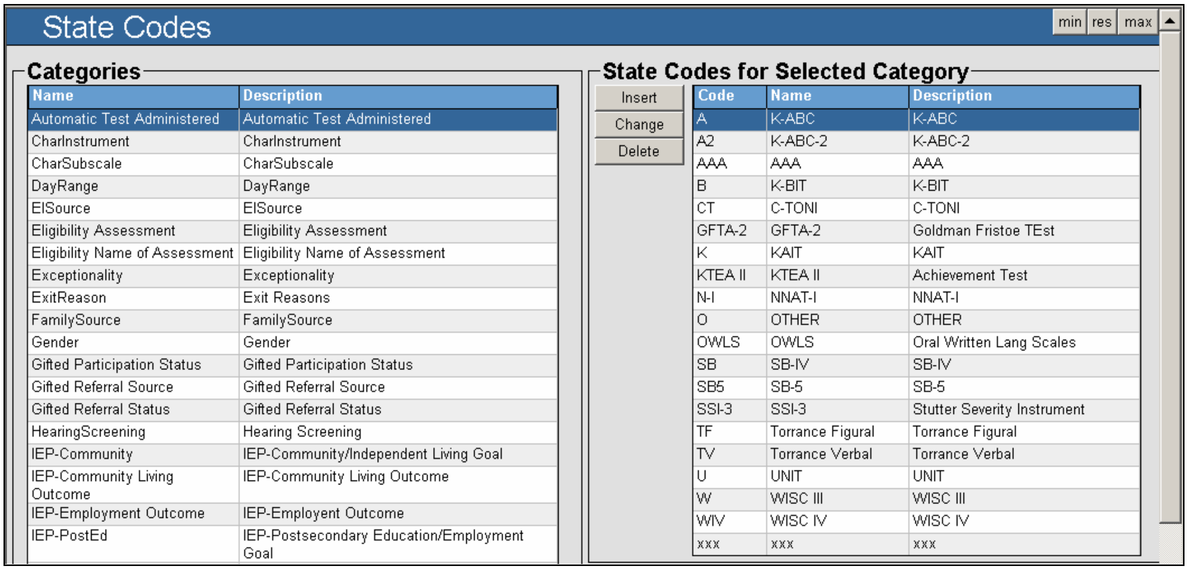
- Click **Insert** or **Change** to access the following fields:
  - <u>Name</u>: Title of the location.
  - <u>Description</u>: Any notes on this location.
  - <u>Expiration</u> (optional): The last date on which this location will be used.
- Click **Delete** to remove a selected location.

District and State Codes

To access this menu option, click the plus sign beside **Code Desktop** and then select **District Codes**. Most of these codes are NOT editable because they are defined by the state.

- If the **Insert**, **Change** and **Delete** buttons do NOT appear next to the codes listed for a selected category, that code category is locked.
- If the **Insert**, **Change** and **Delete** buttons do appear next to the codes listed for a selected category, then that code category is editable.

The screen shot that follows shows an **unlocked** code category:



Name	Description
Automatic Test Administered	Automatic Test Administered
CharInstrument	CharInstrument
CharSubscale	CharSubscale
DayRange	DayRange
ElSource	ElSource
Eligibility Assessment	Eligibility Assessment
Eligibility Name of Assessment	Eligibility Name of Assessment
Exceptionality	Exceptionality
ExitReason	Exit Reasons
FamilySource	FamilySource
Gender	Gender
Gifted Participation Status	Gifted Participation Status
Gifted Referral Source	Gifted Referral Source
Gifted Referral Status	Gifted Referral Status
HearingScreening	Hearing Screening
IEP-Community	IEP-Community/Independent Living Goal
IEP-Community Living Outcome	IEP-Community Living Outcome
IEP-Employment Outcome	IEP-Employent Outcome
IEP-PostEd	IEP-Postsecondary Education/Employment Goal

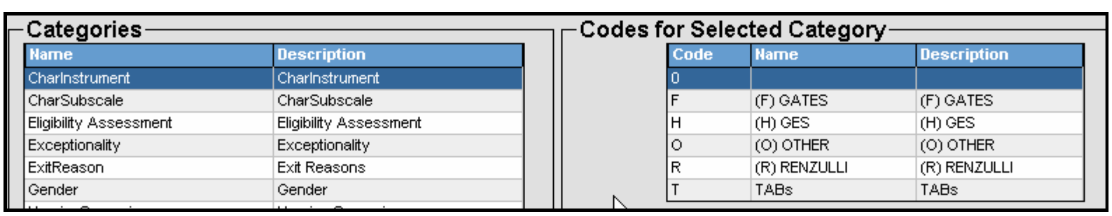
Code	Name	Description
A	K-ABC	K-ABC
A2	K-ABC-2	K-ABC-2
AAA	AAA	AAA
B	K-BIT	K-BIT
CT	C-TONI	C-TONI
GFTA-2	GFTA-2	Goldman Fristoe TEst
K	KAIT	KAIT
KTEA II	KTEA II	Achievement Test
N-I	NNAT-I	NNAT-I
O	OTHER	OTHER
OWLS	OWLS	Oral Written Lang Scales
SB	SB-IV	SB-IV
SB5	SB-5	SB-5
SSI-3	SSI-3	Stutter Severity Instrument
TF	Torrance Figural	Torrance Figural
TV	Torrance Verbal	Torrance Verbal
U	UNIT	UNIT
W	WISC III	WISC III
WIV	WISC IV	WISC IV
xxx	xxx	xxx

When a code needs to be edited, the user should first modify the State Code and then modify the District Code.

Example

To customize the selection list of Assessment names, select **Utilities** and then go to the sub category **Code Desktop**.

- Select **State Codes**.
- Select *Eligibility Name of Assessment* category.
  - Click **Insert**, and enter Code, Name and Description. Disregard the Federal Codes.
  - Click **OK** to save changes.
- Select **District Codes** and *Eligibility Name of Assessment* category.
  - Click **Insert** and enter *Code*, *Name* and *Description*. Then select the code you previously entered into state codes from the *State Code* drop-down box.



Name	Description
CharInstrument	CharInstrument
CharSubscale	CharSubscale
Eligibility Assessment	Eligibility Assessment
Exceptionality	Exceptionality
ExitReason	Exit Reasons
Gender	Gender

Code	Name	Description
0		
F	(F) GATES	(F) GATES
H	(H) GES	(H) GES
O	(O) OTHER	(O) OTHER
R	(R) RENZULLI	(R) RENZULLI
T	TABs	TABs

Managing Student Data (Student Maintenance)

Create Student Folder

Creating a *Student Folder* introduces a student to the Special Education process. As forms are completed in the program, the dates are written to the folder. The purpose of the folder is to house the most current information on Special Education students.

- **Assign Case Manager**: By default, the person logged in is assigned as the Case Manager. To change the default, click the blue plus icon near the upper left corner of the *Case Manager* field.
- After entering data in the appropriate field, click **Search**.
- Highlight the name of the desired student and either double-click on the name or click **Import**.
- When you click on **Import**, you will receive a message that says *These student(s) have been found in SETS that may match the one you are attempting to import. Do you still want to import?* Click **Yes** to import or click **No** to cancel the procedure. .

> Important Note: If a student record is not in STIDistrict Workstation, the record will not be in STISETSWeb. Students already in STISETSWeb will NOT appear in create a student folder.

Caseload Assignment

The purpose of the *Caseload Assignment* section is to create the Special Education relationship(s) between staff members and particular students. The student listed at the top of the screen is the student with whom the user is working. A staff member may be associated with a student in multiple ways. All assignments are performed here except assignment of a Case Manager.

- Select the *Caseload Assignment* menu from the **Utilities Desktop**.
- Make note of the student name displayed at the top of the screen. This is the student to whom you are assigning teachers.
- Click **Insert**.
- Click the blue plus icon to search for an employee. Select the appropriate name and click **OK** to continue. Click the down arrow to select this employee's relationship to the student. Then click **OK** to save.

> Note: The types of relationships are pulled from the *District Code* field (*Staff-Student Relationship*). This is one of the few editable codes.

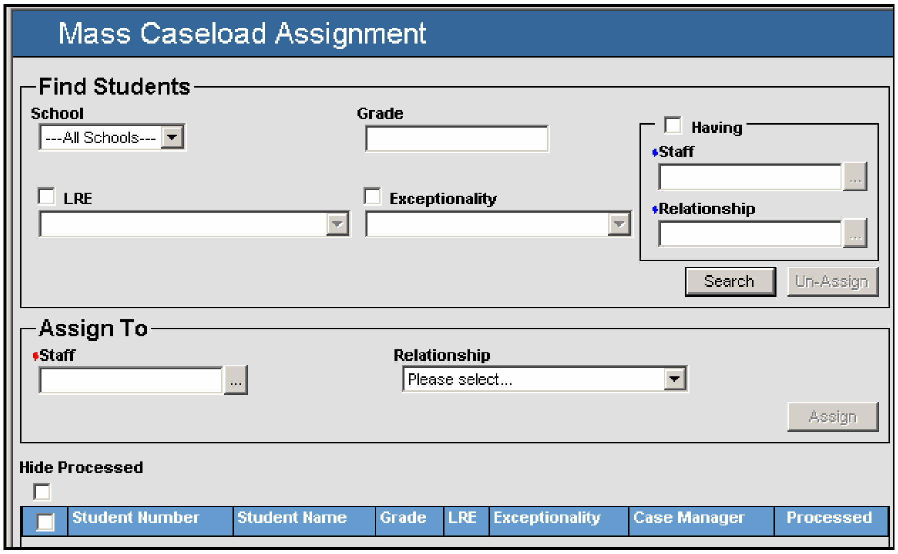
Delete a Student

Occasionally it becomes necessary to delete a student record. For example, a Special Education Folder may have been created by mistake for a student. Deleting a student from the STISETSWeb database does not delete the student from the STIDistrict database or the STIOffice program. The only record deleted is the student's Special Education Folder.

- Select **Delete a Student** from the *Utilities Desktop*.
- After the desired criteria have been entered, click **Search**.
- Highlight the name of the student to be deleted and click the **Delete** button on the lower right. After deletion, the program will return to the *User Desktop*.

> Note: You cannot delete any student who has completed forms.

Mass Caseload Assignment



This utility is used to change relationships from one staff member to another. This should be utilized at the start of school or end of year when students are moving from schools or grades.

Mass Caseload Assignment is a two-step process:

- The user must first decide which students are to be moved from their current teachers.
- The user should decide which teachers will receive these students.

It is easiest to read this area as though it were a sentence: *Find all students having ____teacher, with ____ relationship; or find all grade__ students. Then assign them to ___ staff member with the new relationship of _____.*

To mass-move a caseload or relationship:

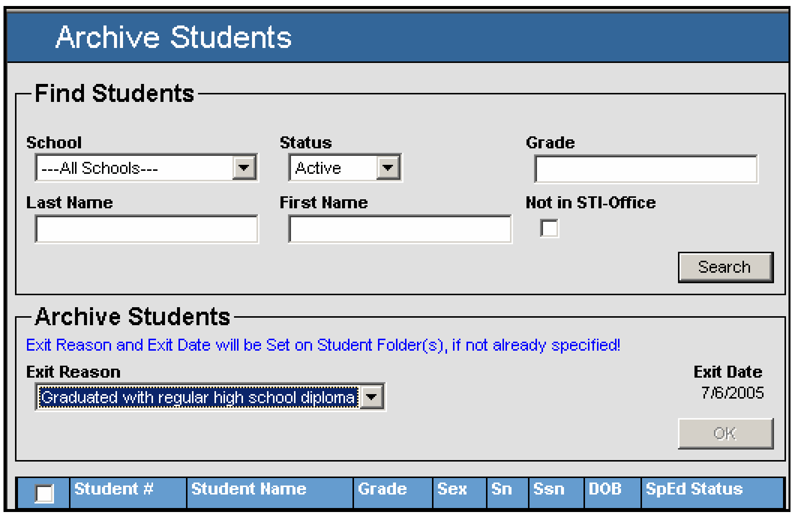
- In *Find Students*, search: School, Grade, LRE, and /or Exceptionality for the students to be moved.
- Once you have fulfilled the search criteria, click the **Search** button.
- There is one more search option, **Assign To**. Use this feature to define the staff member to whom the selected students are to be assigned. The relationship must be defined as well. **DO NOT** click **Assign** at this point.
- Select the student from the search box below. When the box beside the appropriate student has been checked, click **Assign**.
- Continue this process until all students have been moved to the appropriate staff member.

Archive Students

This feature is provided to allow users to archive records of students who are no longer receiving services in a district.

The Archival process is an End of Year procedure. The basic action performed during this process is the selection of students followed by the mass-exiting of the selected students.

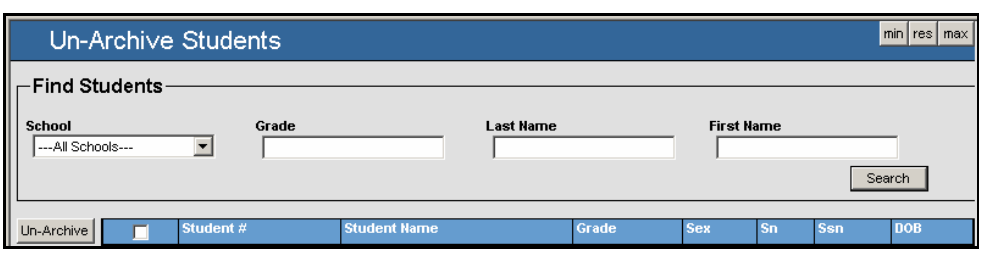
- Archiving automatically changes the Exit Reason. Archiving does NOT change the status of the student folder.
    - First search the students as previously explained.
    - Check the *non-STIOffice* checkbox to select students who are not in the STIOffice program.
- Click **Search** to continue.
- Continue to the *Archive Students* box. Select the *Exit Reason* and select an *Exit Date*.
- Check the box next to each applicable student's name. Then click **OK**.



Un-Archive Students

This utility is used to reverse students' Archived status. It is recommended that this procedure only be used as the Special Education director has outlined within your district. To un-archive a student:

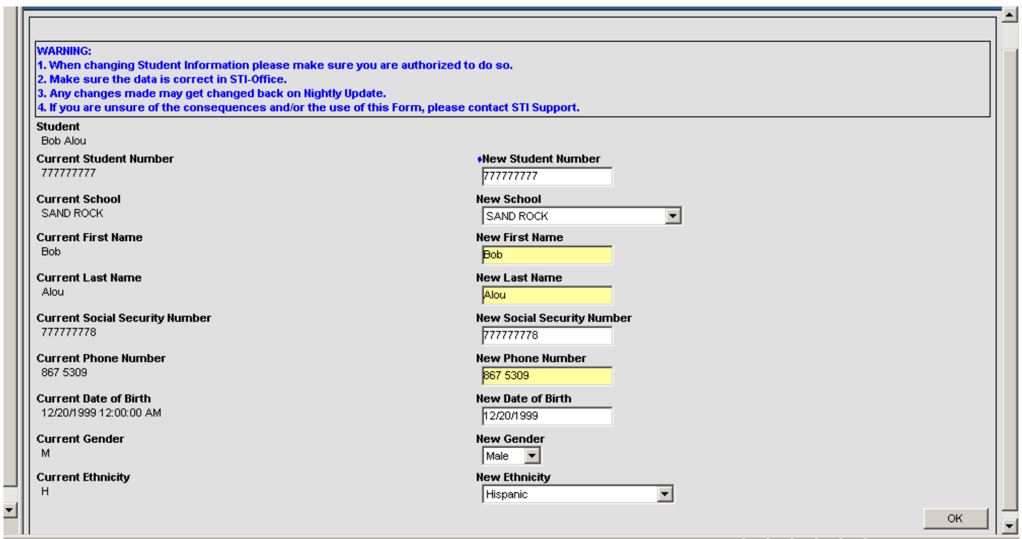
- First locate the students to un-archive.
- Click in the checkbox to un-archive a student or click in the checkbox to the right of *Un-archive* to select all students. To select multiple checkboxes, hold down the *Shift* key on the keyboard as you click on each box.
- After all boxes have been selected, click the **Un-Archive** button to the right of the search results field.



Critical Student Information

This tool should only be used by a System Administrator to change a student's existing Student Number or school in STISETSWeb to match that in STIOffice. Student Numbers are entered as numeric combinations, with no alphabetical or special characters permitted. These data elements may be changed: *Student Number, School, First Name, Last Name, Social Security Number, Phone Number, Date of Birth, Gender and Ethnicity.*

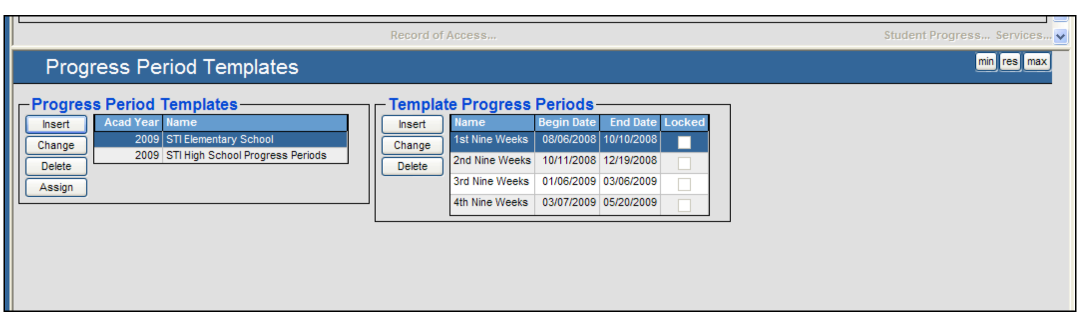
- Choose the appropriate student using *Select a Student*.
- Go to **Utilities Desktop | Change Student Number**
- Read the warning screen. If you are ready continue, adjust information such as *Student Number* or *School* as needed.



Utilities Desktop | Progress Periods

Progress periods are used by System Administrators to set the current progress reporting periods for the entire district. Progress periods are used in conjunction with the STISETSWeb Progress Report, found on the Reports Desktop. Progress periods must be set up prior to reporting progress on any student. To add or edit progress periods:

- Click **Insert** to add a new progress period.
  - Outline the progress reporting periods as needed.
  - Enter the date in *MM/DD/YYYY* Format.
  - Progress periods must not overlap.
- Select an existing record and click **Change** to modify it.
- Select an existing record and click **Delete** to remove it.



Alert Templates

Alert Templates will be set up by Administrators or Managers. These templates may be set up for schools and/or staff types.

When setting up an alert template, you have the option to **Insert**, **Change** or **Delete**.

- **Insert**: Allows user to insert a new alert template.
- **Change**: Allows user to change an existing template.
- **Delete**: Allows user to delete a template.

The *Template Properties* screen will appear if the user chooses to **Insert** or **Change** a template.

- **Alert**: Drop-down box used to select the Alert Type. See the table above for descriptions.
- **Scope**: Drop – down box select the appropriate heading.
- **School**: Allows the user to choose a specific school for this alert to display. If left blank, the alert will show for all schools.
- **Staff Type**: Allows the user to choose a specific staff type for this alert to display. This staff type is from the staff type that is set up in the *Employee Information* area – NOT the user group.
- **Days Before**: Enter the number of days before the due date that you would like the alert to display.
- **Days After**: Enter the number of days after the due date that you would like the alert to display.
    - **Example**: A Special Education Manager or Administrator may set up a Reevaluation.