

Student Records



Online System

2017 National Summer Institute


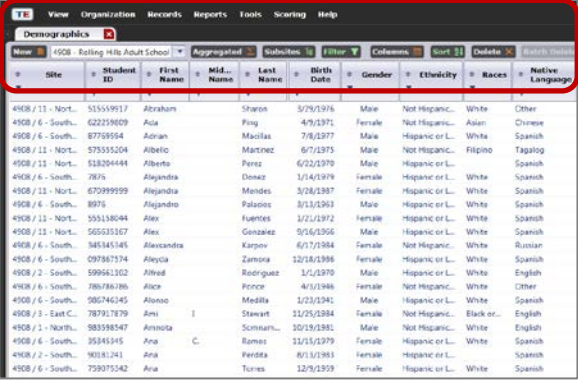
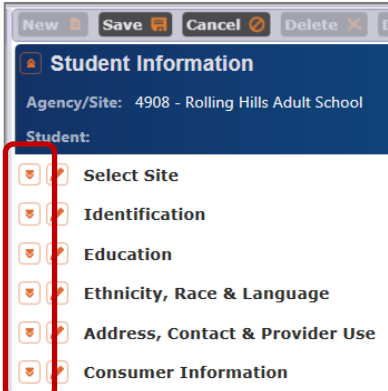
Contents

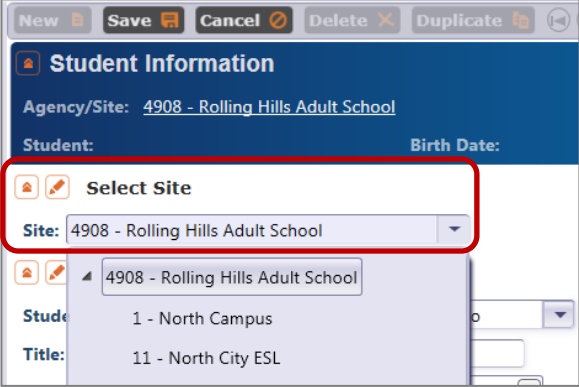

Steps to Add Student Records.....	3
Steps to Edit Student Records	8
Import Student Data	8
Steps to Add Test Records.....	9
Import Test Data	12
Steps to Merge Duplicate Student Records	13
CASAS Contact Information	19
Training Support.....	19
Technical Support	19

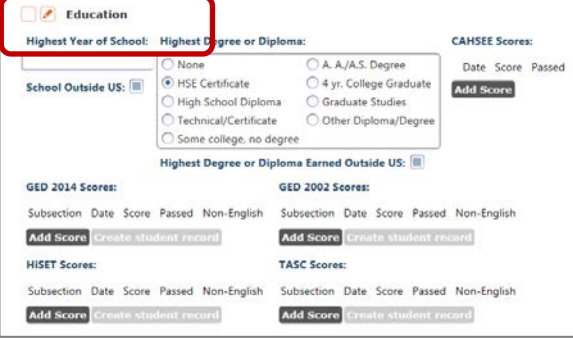


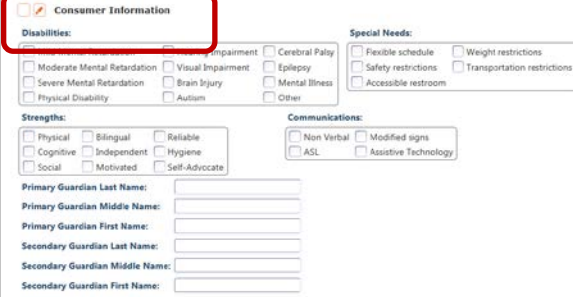
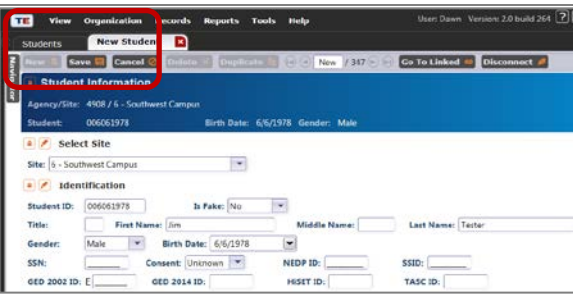
Steps to Add Student Records

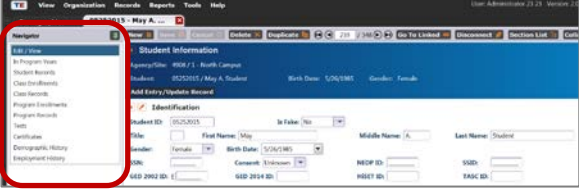
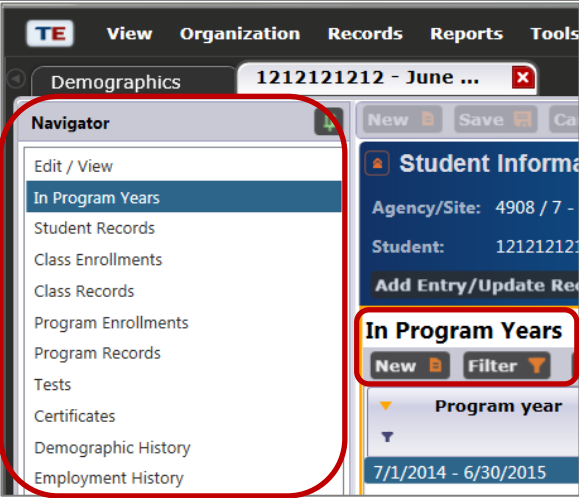
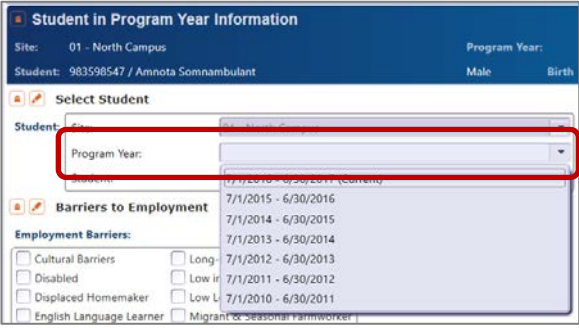
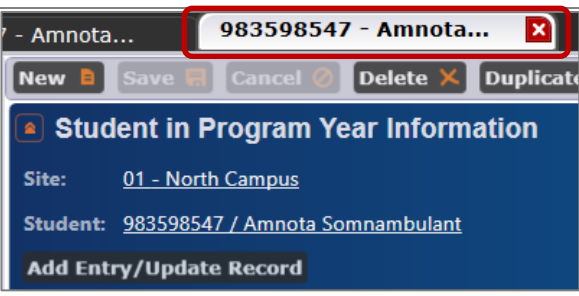
Overview

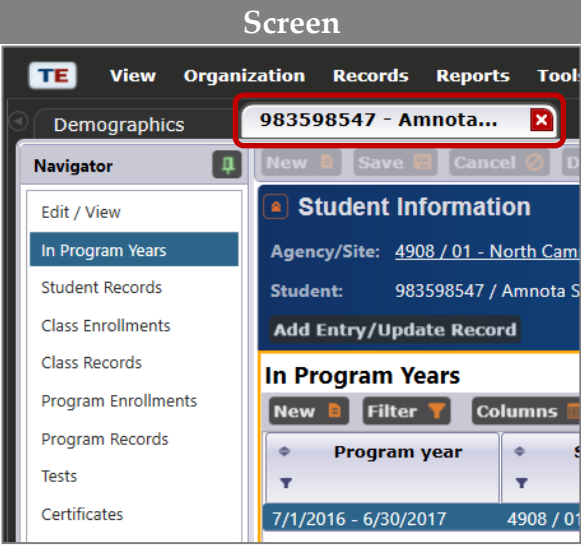
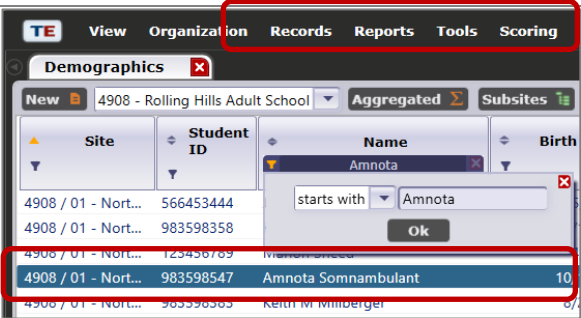
- The CASAS Online System offers **four** methods for adding **Student Records** to your online account with –
 - CASAS eTests Online through –
 - Testing or Registration sessions.
 - TOPSpro Enterprise (TE) through –
 - Manual data entry,
 - Scanning, or
 - Importing from a 3rd – Party System or fillable Import Template.

Step	Screen	Description
1.		<ul style="list-style-type: none"> To add a New Student record in TE, <ul style="list-style-type: none"> From the Records menu, <ul style="list-style-type: none"> Select Students, and then Click Demographics.
2.		<ul style="list-style-type: none"> By default, the list opens to display records for students who have activity in the current program year. To add a New Student record, <ul style="list-style-type: none"> From the Toolbar at top left of the list, <ul style="list-style-type: none"> Click New.
3.		<ul style="list-style-type: none"> A new tab opens to input Student Information in <u>six</u> distinct sections. To introduce you to each section while adding a new Student Record, and to minimize information displayed on your screen, scroll through the record and <ul style="list-style-type: none"> Click the arrow icon at left to <u>collapse</u> each section.


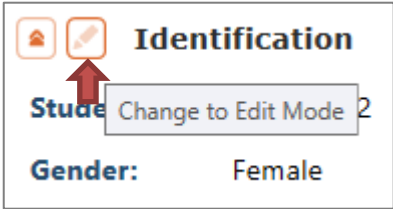
Step	Screen	Description
4.		<ul style="list-style-type: none"> Click the arrow icon at left of Select Site and <u>expand</u> the section. All student records are site-based to track and record activity at the Site. <ul style="list-style-type: none"> When reporting outcomes, Student Records are aggregated across all Sites to roll up all records related to the student into one complete record. Click the Site field down-arrow. Select a Site from the drop-down menu to add a New Student record.
5.		<ul style="list-style-type: none"> Click the arrow icon at left of Identification and <u>expand</u> the section. For Identification, <ul style="list-style-type: none"> Enter a “unique” Student ID.
6.	<ul style="list-style-type: none"> Student ID is a <u>mandatory</u> field. The Identification Code is assigned by the agency to uniquely identify a student within the agency. The record may be saved without entering any further information however, this is not recommended. The <u>same</u> ID should be used for the student to record activity at different sites. <ul style="list-style-type: none"> This includes using the <u>same</u> “unique” ID for progress testing (pre- and post). A Social Security Number (SSN) may be collected through <i>eTests Online</i>. <ul style="list-style-type: none"> Using a SSN as the Student ID is not recommended. 	<ul style="list-style-type: none"> At <u>minimum</u>, adding First Name, Middle Initial, and Last Name, selecting Gender, and adding DOB is <u>strongly recommended</u> for data integrity and for aggregating Student Records. RHAS Training: Enter fictitious information for: <ul style="list-style-type: none"> First Name Middle Initial Last Name Gender Birth Date <p>Note! Data Collection information can also be collected using <i>eTests Online</i> and automatically recorded in <i>TE</i>.</p> <ul style="list-style-type: none"> Use the Registration session without testing! Use an Intake session when testing.

Step	Screen	Description
7.		<ul style="list-style-type: none"> Expand the Education section. Education information adds additional unique or permanent information about the student. Enter fictitious Information. <p>Note! Highest Year of School and Highest Degree or Diploma information can be collected using <i>eTests Online</i>.</p>
8.	 <p>Note! Ethnicity, Race & Language information can be collected using <i>eTests Online</i>.</p>	<ul style="list-style-type: none"> Expand the Ethnicity, Race & Language section. This information also provides additional information about the student. Enter fictitious Information.
9.	 <ul style="list-style-type: none"> The new HTML version of <i>eTests Online</i> includes data collection screens for – <ul style="list-style-type: none"> Address Phone E-mail 	<ul style="list-style-type: none"> Expand the Address, Contact & Provider Use section. RHAS Training: We will skip entering information here.
10.		<ul style="list-style-type: none"> Expand the Consumer Information section. These fields are for agencies serving adults with intellectual disabilities. RHAS Training: We will also skip entering information here.
11.		<ul style="list-style-type: none"> After Student Information is added, <ul style="list-style-type: none"> From the Toolbar at top of the new Student Information record, <ul style="list-style-type: none"> Click Save.

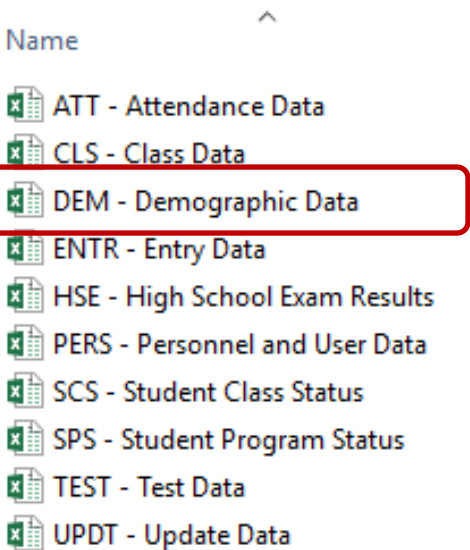
Step	Screen	Description
12.		<ul style="list-style-type: none"> The new Demographics record now displays a Navigator at left where student-related records may be added.
13.		<ul style="list-style-type: none"> If no other record is added for the student at this time, the new record will not display in the list of Demographic records. <ul style="list-style-type: none"> This is because the record has no activity in the current program year. To avoid any confusion, <u>before</u> closing the new student record, from the Navigator at left, <ul style="list-style-type: none"> Click In Program Years. From the Student Information record at right, <ul style="list-style-type: none"> Click New.
14.	 Note! In Program Years records are automatically recorded from testing activity in <i>eTests Online</i> .	<ul style="list-style-type: none"> From the Student in Program Year Information record at right, <ul style="list-style-type: none"> Click the Program Year field down-arrow and select the current program year. Click Save from the Toolbar at top. Click the Red X Box at top on the Student in Program Year Information tab to close the record.
15.		<ul style="list-style-type: none"> Click the Red X Box on the Student in Program Year Information tab to close the record and return to Student Information.

Step	Screen	Description
16.		<ul style="list-style-type: none"> The new In Program Years record is now listed at right of the Navigator for Student Information. Click the Red X Box on the Student Information tab to close the record and return to the Demographics Lister.
17.		<ul style="list-style-type: none"> The new Student now displays in the list of Demographics records. <ul style="list-style-type: none"> Use the Name column Filter if needed to locate the newly added record.
18.	<ul style="list-style-type: none"> Student Records are automatically added when collected and updated using <i>eTests Online</i>. This includes records for – <ul style="list-style-type: none"> Demographics Personal Status Labor Force Status Primary Goal Secondary Goal Program Enrollments are also automatically added when collected through <i>eTests Online</i>. 	<ul style="list-style-type: none"> Demographic History records are automatically added when collected and updated using <i>eTests Online</i>. This includes records for – <ul style="list-style-type: none"> Highest Year of School Highest Degree or Diploma In Program Years records are automatically added when collected and updated using <i>eTests Online</i>. This includes records for – <ul style="list-style-type: none"> Barriers to Employment Test records are automatically added when using <i>eTests Online</i> – i.e., no import/exporting necessary!

Steps to Edit Student Records

Step	Screen	Description
1.		<ul style="list-style-type: none"> The recommended approach to editing Student records is from the Demographics list of records which contains all records related to the student. Use column Filters to locate the student.
2.	 <p>Note! Changes to the Identification code will simultaneously edit all student-related records for the student at the site where the Demographics record exists.</p>	<ul style="list-style-type: none"> Double-click to open the Student Information record. To Edit demographic information for a Student – <ul style="list-style-type: none"> Click the Pencil icon on any Section and <i>Change to Edit Mode</i>. Edit Information as needed. Click Save from the Toolbar at top.

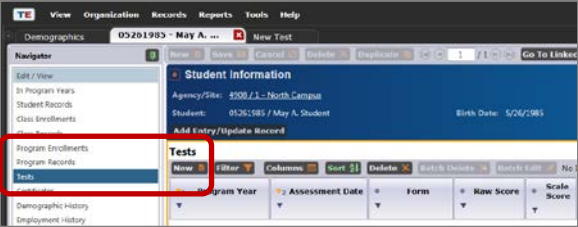
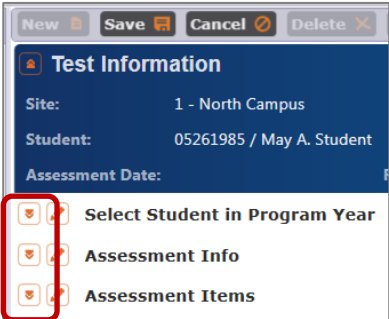
Import Student Data

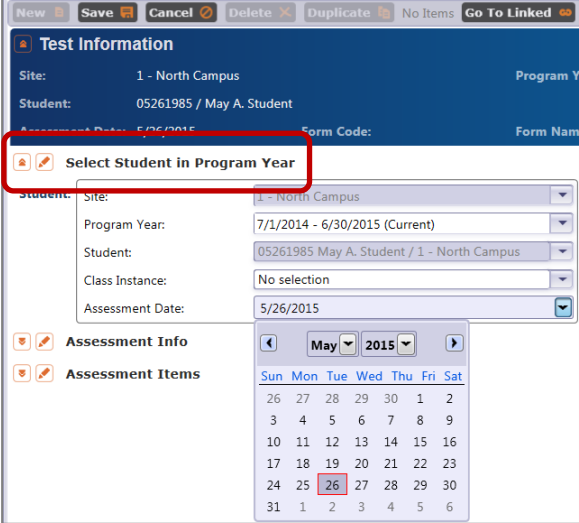
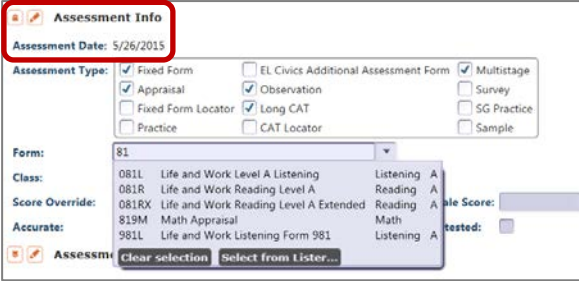
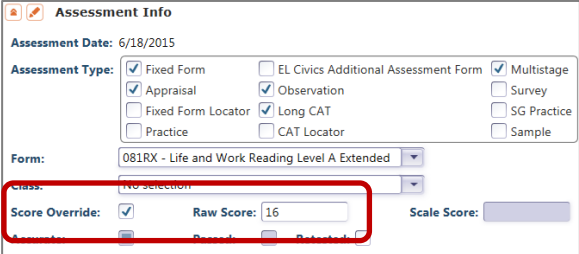
Step	Screen	Description
1.		<ul style="list-style-type: none"> See Exchanging Data with 3rd Party Systems v.1.1 for more information about importing Student Data. <ul style="list-style-type: none"> ➤ IMPORT: DEM – Demographic Data A folder of TE WIOA Import Templates is available from the CASAS website to help you populate your online account without manual data-entry or 3rd Party Import. <ul style="list-style-type: none"> Go to: Home > Product Overviews > Software > TOPSpro Enterprise > TOPSpro Enterprise Help > Data Exchange > TE WIOA Import Templates


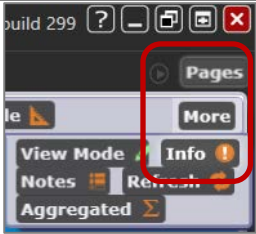
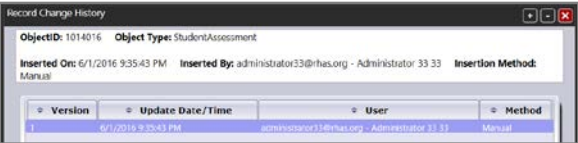
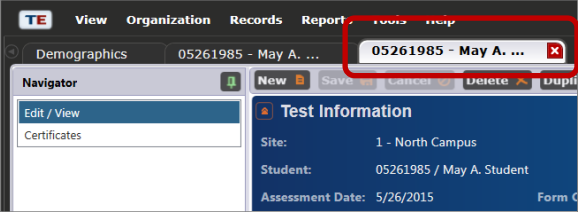
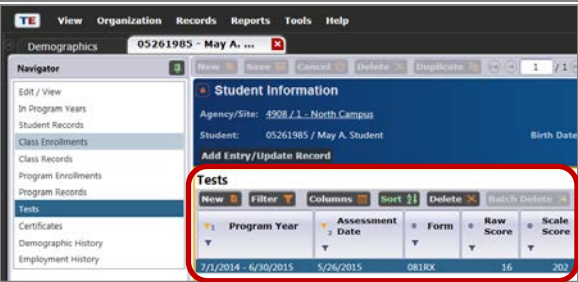
Steps to Add Test Records

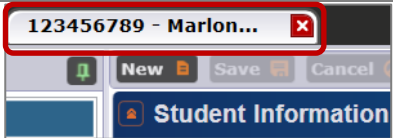
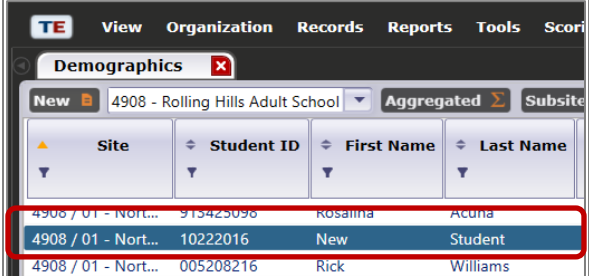
Overview

- The CASAS Online System offers the same **four** methods for adding **Test Records** to your online account for results with –
 - **CASAS eTests Online** through –
 1. Testing or Registration sessions.
 - **TOPSpro Enterprise (TE)** through –
 2. Manual data entry,
 3. Scanning, or
 4. Importing from a 3rd Party System, CASAS eTests Desktop application, or fillable Import Template.
- Test Records** may be added for paper-tests and from tests taken with the CASAS eTests Desktop application to prepare the online system to administer the next test using CASAS eTests Online.
- Adding **Test Records** is also a function generally reserved for data managers.
 - However, Agencies may grant anyone access to TE with rights to add records.

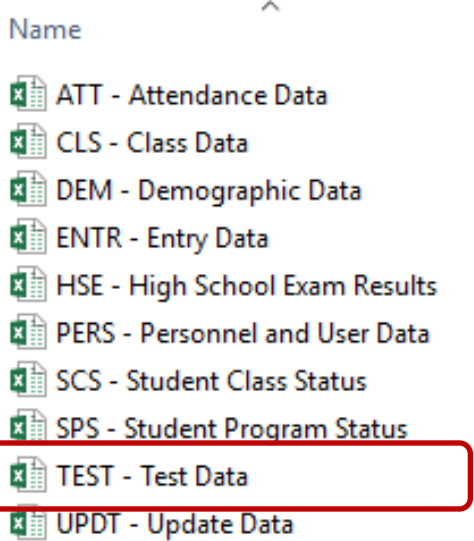
Step	Screen	Description
1.		<ul style="list-style-type: none"> Use the Navigator at left from the student Demographics record, and <ul style="list-style-type: none"> ○ Click Tests. A new window opens at the right to input Test Information. <ul style="list-style-type: none"> ○ Click New.
2.		<ul style="list-style-type: none"> Test information is input in <u>three</u> distinct sections. To introduce you to each section while adding a new Test Record, and to minimize information displayed on your screen, scroll through the record and <ul style="list-style-type: none"> ○ Click the arrow icon at left to <u>collapse</u> each section.

Step	Screen	Description
3.		<ul style="list-style-type: none"> Now, <ul style="list-style-type: none"> Click the arrow icon at left of Select Student in Program Year and <u>expand</u> the section. Because we are adding a Test Record from the Navigator of your fictitious Student, <ul style="list-style-type: none"> Site, PY, and Student information fields are auto-populated. Click the Assessment Date field down-arrow, and <ul style="list-style-type: none"> Select a random Date from the drop-down calendar for the fictitious Test.
4.	 <p>Note!</p> <ul style="list-style-type: none"> Because the online system tracks students and programs across multiple sites and classes through a unique ID, <ul style="list-style-type: none"> Assigning a class to the Test Record is no longer necessary or required. This allows test results to be used for multiple classes and programs and avoids over testing. 	<ul style="list-style-type: none"> Click the arrow icon at left of Assessment Info and <u>expand</u> the section. For Assessment Information, <ul style="list-style-type: none"> Click the Form field down-arrow, and select a Test Form using one of two methods. <ul style="list-style-type: none"> Type to search Select from Lister Class information is optional unless required in your State.
5.		<ul style="list-style-type: none"> Check Score Override. <ul style="list-style-type: none"> Enter a fictitious Raw Score. <ul style="list-style-type: none"> When the record is saved the Scale Score will auto-populate.

Step	Screen	Description
6.		<ul style="list-style-type: none"> If you plan to generate a Student Competency Performance report from test results, <ul style="list-style-type: none"> Do <i>not</i> check Score Override and instead, enter item responses before saving. Click Save from the Toolbar at top of the Test Information screen.
7.		<ul style="list-style-type: none"> The online system tracks the method in which records are added to your online account. <ul style="list-style-type: none"> Click the More button at top right. Click Info from the drop-down menu.
8.		<ul style="list-style-type: none"> A Record Change History pop-up opens to display information about how the record was initially added and if/when the record was changed.
9.		<ul style="list-style-type: none"> To close the new Test Record, <ul style="list-style-type: none"> Click the Red X Box at top on the Test Information tab.
10.		<ul style="list-style-type: none"> A Test Record now displays for the student in the screen at the right. <ul style="list-style-type: none"> Click Refresh if needed to display all Test Information.

Step	Screen	Description
11.		<ul style="list-style-type: none"> To close the new Student Record, <ul style="list-style-type: none"> Click the Red X Box at top on the Student Information tab.
12.		<ul style="list-style-type: none"> You should see your “unique” fictitious Student in the list of Demographics records. Use column Filters to locate the student if needed.

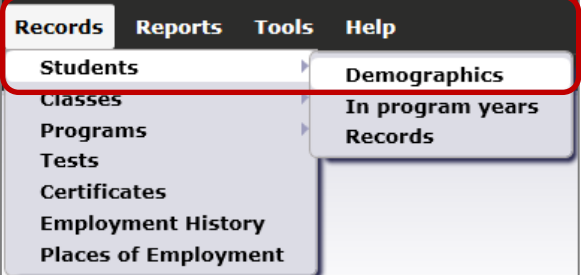
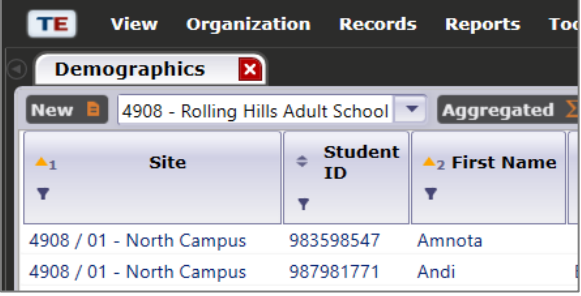
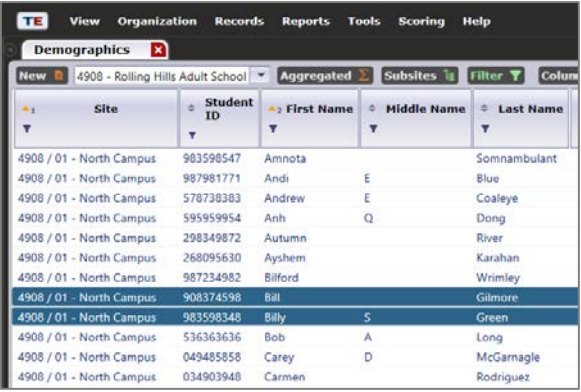
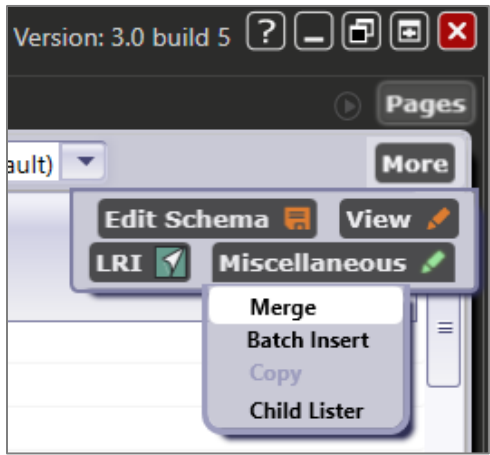
Import Test Data

Step	Screen	Description
1.		<ul style="list-style-type: none"> See Exchanging Data with 3rd Party Systems v.1.1 for more information about importing Test Data. <ul style="list-style-type: none"> ➤ IMPORT: TEST – Test Data A folder of TE WIOA Import Templates is available from the CASAS website to help you populate your online account without manual data-entry or 3rd Party Import. <ul style="list-style-type: none"> Go to: Home > Product Overviews > Software > TOPSpro Enterprise > TOPSpro Enterprise Help > Data Exchange > TE WIOA Import Templates <p>Note! Before importing Test records, be sure to import Student Data first!</p> <ul style="list-style-type: none"> ➤ IMPORT: DEM – Demographic Data

Steps to Merge Duplicate Student Records


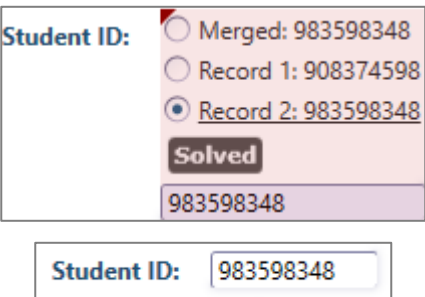
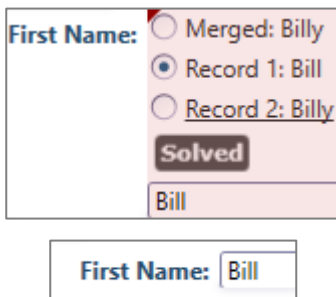
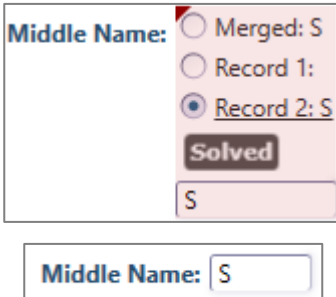
Overview

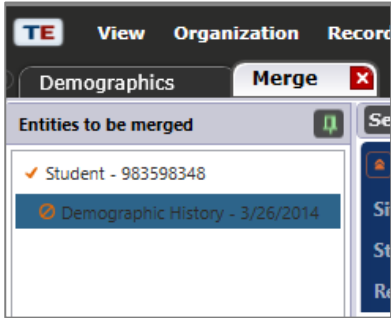
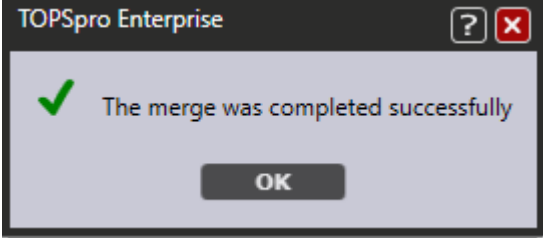
- Steps to bring together two records of the same student in your online database may be found in *TE* from the **Help** menu.
- The **Merge** function is available with both Basic and Enhanced access to the *Online System*. In other words, a *TE* License, or collective agreement with CASAS is *not* required for this function.
- The person who manages the online data typically merges student records.
- You may merge two records of the same student within the same site.
 - In these cases, there is a difference with the student's ID and you will need to highlight both records and click the **Merge** button to consolidate data recorded from both records into one record under the same ID.
- Two records of the same student with the same ID at different sites may *not* be **Merged**.
 - In most cases, there is no difference with the student's ID. The online system records activity for the student per site.
 - In some cases, there may be a difference with the student's ID at each site so you will need to correct the ID at one site to match the ID at the other site.
- Whenever you need to see activity associated with a student from all sites, filter for all **Demographic** records of the student and then click the aggregate button from the toolbar.
- **Note!** Only two duplicate records of the same student at the same site may be merged at one time. If more than two records are duplicated,
 - First, merge two of the duplicate records.
 - Then, merge the third duplicate record with the newly-merged record.
- All conflicting fields between duplicate records must be resolved before a **Merge** will take place.
- Give **Merging** a try by selecting two random records at the same site to step through the process and **Merge** student records.

Step	Screen	Description
1.		<ul style="list-style-type: none"> To merge duplicate student records in <i>TE</i>, <ul style="list-style-type: none"> From the Records menu, <ul style="list-style-type: none"> Select Students, and then Click Demographics.
2.		<ul style="list-style-type: none"> From the Demographics list of records, filter on Site, and then sort by student First Name. <ul style="list-style-type: none"> Click the UP-arrow in the Site header. Hold down the Ctrl key on your keyboard, and then <ul style="list-style-type: none"> Click the UP-arrow in the student First Name header.
3.		<ul style="list-style-type: none"> From the student demographics list, <ul style="list-style-type: none"> Select <u>two</u> records <i>at random</i> to simulate duplicate records of the same student. Click to highlight the First record. Use the Ctrl + click key command to select a Second record. For this example, we are highlighting records for Bill and Billy.
4.		<ul style="list-style-type: none"> With two (simulated) duplicate records highlighted, <ul style="list-style-type: none"> Click the More button at top right. Select Miscellaneous. Click Merge. <p>Note! The Merge button becomes available <i>after</i> two records are highlighted.</p>

Step	Screen	Description
5.	<ul style="list-style-type: none"> TE now displays a screen that shows fields from the two records you selected. The Entities Tree at right highlights Entities to be merged. <ul style="list-style-type: none"> In this example, there are two entities with conflicting information: <ol style="list-style-type: none"> Student Information Demographic History Information Fields with conflicting information are highlighted pink. All conflicting information contained in <u>all</u> Entities to be merged <i>must be solved</i> before the two records can be successfully merged. 	

The screenshot shows the TE application interface. At the top, there's a navigation bar with 'View', 'Organization', 'Records', 'Reports', 'Tools', 'Scoring', and 'Help'. The user is 'Dawn Montgomery' and the version is '3.0 build 5'. The main window is titled 'Merge' and has a sub-header 'Demographics'. On the left, a sidebar shows 'Entities to be merged' with two items: 'Student - 983598348' and 'Demographic History - 3/26/2014'. The main content area is divided into sections: 'Student Information' and 'Identification'. The 'Student Information' section shows fields for Agency/Site, Student, Birth Date, and Gender. The 'Identification' section shows fields for Student ID, Title, First Name, Middle Name, Last Name, Gender, Birth Date, SSN, Consent, NEDP ID, SSID, GED 2002 ID, GED 2014 ID, HISET ID, and TASC ID. Each field has a 'Merged' value and a 'Solved' button. The 'Entities to be merged' list is highlighted with a red box.

Step	Screen	Description
6.	<ul style="list-style-type: none"> The Toolbar offers shortcut options to merge the two selected records. 	
7.		<ul style="list-style-type: none"> ➤ Automatically uses all of the information from the first record to create the merged record. ➤ Automatically uses the data from the second record. ➤ Automatically selects the data from the most recent record. ➤ Selects data from the earliest record. ➤ Merges the two records based on the default. ➤ Cancels your selections and re-highlights all of the conflicting fields so that you can address these issues again.
8.		<ul style="list-style-type: none"> For training, we will solve conflicts per field. For Student ID, <ul style="list-style-type: none"> Select Record 2. Click Solved. <ul style="list-style-type: none"> The Student ID field now displays the solved information.
9.		<ul style="list-style-type: none"> In this example, we will assume Billy is a nickname for Bill. For First Name, <ul style="list-style-type: none"> Select Bill, and then Click Solved.
10.		<ul style="list-style-type: none"> Collecting and recording a Middle Initial is beneficial for added unique identifying information about a student. For Middle Name, <ul style="list-style-type: none"> Select Record 2: S, and then Click Solved. Continue solving all fields with conflicting Student Information.

Step	Screen	Description
11.		<ul style="list-style-type: none"> After solving all conflicts between the two Student records, move on to the next entity to be merged. From the Entities Tree, <ul style="list-style-type: none"> Click Demographics.
12.		<ul style="list-style-type: none"> Continue solving all fields with conflicting information in all Entities to be merged. Use Reset All if you need to start over with solving conflicts in the current Entity. Use Cancel Merge if you are unsure about any conflicts in any Entities to be merged and need to investigate further before attempting the merge. Use Apply Merge after solving all conflicts in all Entities to be merged. <p><i>Important Note! This operation cannot be undone!</i></p>
13.		<ul style="list-style-type: none"> TE will display this message when the Merge is complete. <ul style="list-style-type: none"> Click OK.
14.		<ul style="list-style-type: none"> TE automatically returns to the list of Demographics records where you will see the newly merged record highlighted in the list.

CASAS Contact Information

Mail:	CASAS 5151 Murphy Canyon Rd., Suite 220 San Diego, CA 92123-4339
Website:	www.casas.org
Telephone:	(858) 292-2900 or toll free (800) 255-1036
Fax:	(858) 292-2910
E-mail:	
General questions:	casas@casas.org
Training questions:	training@casas.org
Ordering questions:	orders@casas.org
California Accountability:	capm@casas.org
California AEBG - Adult Ed Block Grant:	aebg@casas.org
CASAS Technology Support Team:	techsupport@casas.org

Training Support

Help documentation is available at: [CASAS Home](#) > [Training and Support](#) >

- [eTests Online Help](#)
- [TOPSpro Enterprise Help](#).

Enroll in a complimentary workshop at: [CASAS Training Registration](#).

Technical Support

The **CASAS Technology Support Team** is available at techsupport@casas.org to provide technical assistance for successful online implementation and uninterrupted test delivery. Team members are available 6:00 am – 5:00 pm (Pacific), M – F, at 1-800-255-1036, option 2.

If you have any questions or if there is anything that we may help you with, please let us know.

CASAS Technology Support Team

techsupport@casas.org | 1-800-255-1036, option 2



Comprehensive Adult Student Assessment Systems
5151 Murphy Canyon Road, Suite 220
San Diego, CA 92123-4339
(858) 292-2900
www.casas.org

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