

STISETS MO – Utilities

Utilities Desktop

The **Utility Desktop** houses several options that enhance the operation of the software. STISETS has a *System File* option located under **Utility Desktop**. It is recommended that only one user have access to the STISETS 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 STISETS program.

Utilities Desktop | System File

For STISETS/InformationNOW Users:

The *System File* will allow the Sets Administrator to allow or disallow student Social Security Numbers to display and to set an inactivity logout time.

- **Configuration:**
 - Miscellaneous Settings:
 - Show Student SSN: 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
 - Inactivity Timeout: 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.

Defining Security Groups

The security model for STISETS is very robust, allowing the 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.

Insert	Name	Description	Members...		
Change	Administrators	Administrators Group			
Delete	General Ed. Teachers	General Ed. Teachers Group			
Copy	Managers	Administrators Group			
Print	StateUsers	State Users Group			
	Teachers	Teachers Group			

User Name	Last Name	First Name
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Note: If users are not assigned a security group, they will have NO options after logging in to the program.

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

- **Managers**: Employees assigned to this security group have full access to the software for managing records in their school only. Managers have full access to student records and managing the STISETS software in their school.
- **Teachers**: 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.
- **General Ed. Teachers**: 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.
- **Administrators**: Administrators have full user access for all schools in the district. Typically, board office personnel would be assigned to this security group.

Security Group Edit Commands

The following options may be used 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. Search by:
 - **Object Types**: Three different classifications of security in STISETS.
 - **Groups**: Group whose permissions are to be viewed. For more information on this, please refer to the *STISETS 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).
- **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. Search by:
 - **Object Types**: Three different classifications of security in STISETS.

- **Groups:** Group whose permissions are to be viewed. For more information on this, please refer to the *STISETS 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 one of two ways. Begin by expanding the *Utilities Desktop*. The available options are shown below.

Employees min res

* Staff member does not have a User account in InformationNOW. A User account for this staff member must be setup in InformationNOW in order to grant them access to SETS.

Search Criteria

Last Name First Name Include Only SETS Teachers Search

View Caseload Form Contact Grant

Teacher Number	Last Name	First Name	Access to SETS
ST1064	Aaron	Alora	<input type="checkbox"/>
ST1038	Adams	Roberta	<input type="checkbox"/>
ST1071	Adams	Roberta	<input checked="" type="checkbox"/>
ST1075	Barnes	Gennifer	<input type="checkbox"/>
ST1035	Bax	Kelly	<input type="checkbox"/>
ST1065	Bell	Betty	<input type="checkbox"/>
ST1063	Brown	Betty	<input type="checkbox"/>

- Verify that the teacher does not exist in the system by performing a **Search** for the employee before attempting to grant a teacher access to STISETS. Once it is determined that the staff member does not have access to STISETS, uncheck Include Only SETS Teachers and Search. The screen will then display staff members who have a staff record in the INOW database. **A staff member must have a User Account in InformationNOW prior to gaining access to STISETS.**
- To import an employee, click **Grant**. This will copy information from the employee file that exists in INOW database. Since demographic information will be automatically copied over, this option will save time.
- Once the teacher has been granted access to STISETS, the new staff member will need to assigned to a *STISetsuser* group

Users

Search Criteria

Last Name First Name Search

Groups

☐ Administrators
☐ General Ed. Teachers
☐ Managers
☐ Teachers

Save

User Name	Last Name	First Name	Teacher Number	School Number
radams	Adams	Roberta	ST1071	1050
gbarnes	Barnes	Gennifer	ST1075	1050
bb	Brown	Betty	ST1063	1050
setsadmin	System Admin	Sets	ST1069	1050

Defining Codes

The *Code Desktop* houses all the 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*.

Location Types				min	res	max
Insert	Name	Description	Expiration Date			
Change	Classroom	Classroom				
Delete	Counsellors Office	Counsellors Office				
	Gymnasium	Gymnasium				
	Hearing lab	Hearing lab	12/31/2006			
	High School	High School	10/12/2005			
	Resource Room	Resource Room				
	School Bus	School Bus				
	Vision Lab	Vision Lab	12/31/2006			

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

State/District Codes

To access this menu option, click the plus sign beside **Code Desktop** and then select **State/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, that code category is editable.

The following shows an **unlocked** code category:

State/District Codes				min	res	max
Categories		Codes for Selected Category				
Name	Description	Insert	Code	Name	Description	
Automatic Test Administered	Automatic Test Administered	Change	00			
CharInstrument	CharInstrument	Delete	BVAT	BVAT	BVAT	
CharSubscale	CharSubscale		CT	C-TONI	C-TONI	
DayRange	DayRange		A	K-ABC	K-ABC	
EI to Preschool - Late Elig. - Other Delays	EI to Preschool - Late Elig. - Other Delays		A2	K-ABC-2	K-ABC-2	
EI to Preschool - Late Elig. or IEP - Parent Delay	EI to Preschool - Late Elig. or IEP - Parent Delay		B	K-BIT	K-BIT	
EI to Preschool - Late IEP - Other Delays	EI to Preschool - Late IEP - Other Delays		K	KAIT	KAIT	
Eligibility Assessment	Eligibility Assessment		N-I	NNAT-I	NNAT-I	
Eligibility Name of Assessment	Eligibility Name of Assessment		O	OTHER	OTHER	
Exit Document Type	Exit Document Type		RIAS	RIAS	RIAS	
ExitReason	ExitReason		SB5	SB-5	SB-5	
Gender	Gender		SB	SB-IV	SB-IV	
Gifted Participation Status	Gifted Participation Status		TF	Torrance Figural	Torrance Figural	
Gifted Referral Source	Gifted Referral Source		TV	Torrance Verbal	Torrance Verbal	
Gifted Referral Status	Gifted Referral Status		U	UNIT	UNIT	
GiftedTimelineDelays	GiftedTimelineDelays		W	WISC III	WISC III	
HearingScreening	HearingScreening		WIV	WISC IV	WISC IV	
IEP-Community	IEP-Community		zzz	ZETA Test		
IEP-Community Living Outcome	IEP-Community Living Outcome					
IEP-Employment Outcome	IEP-Employment Outcome					
IEP-PostEd	IEP-PostEd					
IEP-Transition	IEP-Transition					
InactiveStatusReasons	InactiveStatusReasons					
Language	Language					

Example

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

- Select **State/District Codes**.
- Select *Eligibility Name of Assessment* category.
 - Click **Insert**, and enter Code, Name and Description. Disregard the Federal Codes.
 - Click **OK** to save changes.

Utilities | Process Desktop

Utilities Process Desktop lists each of the Processes available in the program and the forms that are contained or available in that Process. The screen will also display the minimum and maximum number of each form within the highlighted process. Note the minimum number assigned to the form is the number of forms required to be completed in order to close a process.

Record of Access...				Services			
Name	Pub	Description	Days	Description	Min	Max	Sequence
BOE Process	<input checked="" type="checkbox"/>	BOE Process		*NEW* Individualized Education Program - Section A	1	99	1
Discipline Process	<input checked="" type="checkbox"/>	Discipline Process		*NEW* Individualized Education Program - Section B	1	99	2
IEP/Annual Review Process	<input checked="" type="checkbox"/>	IEP/Annual Review Process		*NEW* Individualized Education Program - Section C	1	99	3
Initial Evaluation Process	<input checked="" type="checkbox"/>	Initial Evaluation Process		*NEW* IEP - Form A - Blind and Visually Impaired	0	99	4
Miscellaneous Process	<input checked="" type="checkbox"/>	Miscellaneous Process		*NEW* IEP - Form B - Extended School Year	0	99	5
Re-Evaluation Process	<input checked="" type="checkbox"/>	Re-Evaluation Process		*NEW* IEP - Form C - Transition Services Plan	0	99	6
Speech Process	<input checked="" type="checkbox"/>	Speech Process		*NEW* IEP - Form D - State Assessment and Accommodations	0	99	7
Transfer Process	<input checked="" type="checkbox"/>	Transfer Process		*NEW* IEP - Form E - District-Wide Assessments	0	99	8
				NEW IEP - Form F - Accommodations and Modifications	0	99	9
				NEW IEP - Data Collection Page	0	99	10
				NEW IEP - IEP Addendum	0	99	11
				NEW IEP - Excusal of Mandatory IEP Team Members	0	99	12
				Agreement Form			
				NEW Post Secondary Goals	0	99	13
				Notice of Action	0	99	14
				Notification of Meeting	1	99	15
				Transfer of Parental Rights at Age of Majority	0	99	16
				Weekly Class Schedule	0	99	17
				Behavioral Intervention Plan	0	99	18
				Student Information Release Form	0	99	19

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**.
- After clicking **Import**, a message will display indicating *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. .

Note: If a student record is not in STIDistrict Workstation, the record will not be in STISETS. Students already in STISETS will NOT appear in the option to 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 individual 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 teachers are assigned.
- 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 STISETS database does not delete the student from the *InformationNOW*. 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: Users may not delete any student with completed forms.

Mass Caseload Assignment

The screenshot shows the 'Mass Caseload Assignment' utility window. It has a blue header bar with the title. Below the header, there are two main sections: 'Find Students' and 'Assign To'. The 'Find Students' section contains fields for 'School' (a dropdown menu), 'Grade' (a text input), 'LRE' (a checkbox), 'Exceptionality' (a checkbox), and 'Having' (a dropdown menu with 'Staff' and 'Relationship' options). There are 'Search' and 'Un-Assign' buttons. The 'Assign To' section contains a 'Staff' dropdown menu and a 'Relationship' dropdown menu with the text 'Please select...'. There is an 'Assign' button. At the bottom, there is a 'Hide Processed' checkbox and a table with columns: 'Student Number', 'Student Name', 'Grade', 'LRE', 'Exceptionality', 'Case Manager', and 'Processed'.

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:

- Decide which students are to be moved from their current teachers.
- 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.
- After completing 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 also be defined. **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 allows 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. **Students should only be archived after all state reports are completed.**

- Archiving automatically changes the Exit Reason. Archiving does NOT change the status of the student folder.
 - First search the students.
 - Check *Not In SIS* to select students who are not in *InformationNOW*.
- Click **Search** to continue. Students meeting the search criteria will display at the bottom of the screen. Select the student to be archived.
- Continue to the *Archive Students* box. Select either the *Exit Reason* and select an *Exit Date* or Archive Reason and Archive Date. Verify that the desired student to be archived is selected @ the bottom of the screen.
- Click **OK**.

Archive Students min res max

Do not archive students with a Date signed Notice and Consent for Evaluation Received in Public Agency that falls in the current state reporting period, until all state reports have been submitted.

Find Students

School: ---All Schools---

Case Manager: [text] [add]

Grade: [text]

Last Name: [text]

First Name: [text]

Status: Active

Not in SIS: ☐

[Search]

Archive Students

Note: Gifted students (primary exceptionality of GT) will not be exited.

Exit Reason: [dropdown]

Archive While Exiting: ☐

Exit Date: MM/dd/yyyy

OR

Archive Reason: [text]

Archive Date: MM/dd/yyyy

Duplicate Folder: ☐

Selected Students' Case Manager will be set to "System Administrator."

[OK]

Student #	Student Name	Grade	Sex	School Number	Ssn	DOB	SpEd Status	Case Manager	Exceptionality
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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 the 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 and 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 is a View only Screen which display the demographic information for the selected student as it appears in InformationNOW.

- Choose the appropriate student using *Select a Student*.