



W S I P C

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WSIPC Guide to
Civil Rights Data
Collection (CRDC)
for HR/Finance Data

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About This Guide

The U.S. Department of Education (ED) conducts mandatory Civil Rights Data Collection (CRDC) to obtain data on key education and civil rights issues in the nation's public schools. This data is used by the Office of Civil Rights (OCR) for enforcement and monitoring.

This Guide explains how districts create the Human Resources (HR) CRDC extracts. Each district electronically submits a combined comma-separated value (CSV) file to the Office of Civil Rights' website. To find out when the CRDC collection tool opens for data submission, refer to the Office of Civil Rights' website.

What You Should Know Before You Start

You'll find that this Guide is much more helpful if you have experience configuring templates, selecting Employee Management Plans, and if you are familiar with the CRDC information on the U. S. Department of Education website:

<http://www2.ed.gov/about/offices/list/ocr/data.html?src=rt/LEA/downloads.aspx>.

You can also find the CRDC information nicely organized on the following website:
<https://crdc.grads360.org/#program>.

Be Sure You're Signed In

This Guide is intended to be read while you are working in the Office of Civil Rights (CRDC) Federal Reporting area, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.

How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button  in the menu bar on the left side of the screen.

Screen Shots

You'll find screen shots throughout the guide to help you learn how to use the software. The data entered in the screen shots in this Guide is an example of the data you might enter. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

What's in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

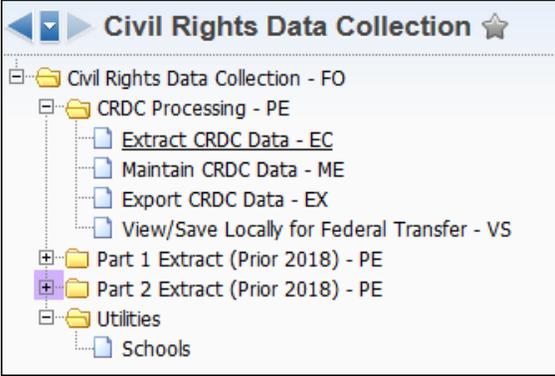
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What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and warnings, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
Updated the Guide to reflect WSIPC's software release version 05.18.10.00.07.	N/A
CRDC Element labels changed, requiring software label changes. Screen shots are refreshed with the updated section labels.	N/A
Wherever possible, removed reference to specific reporting year, to allow guide to be universally used. User should approach this Guide knowing which reporting year is required for submission.	N/A

Description of Change	Page #
<p>Prior to the 2017-2018 reporting year, the CRDC Extract was divided into 2 Extract files (as shown in the screen shot below). If previous submission year Part 1 and Part 2 logic is needed, these options are still available.</p>  <p>Beginning with the 2017-2018 CRDC Submission Year, the extract should be run out of the File that is <i>not</i> marked “(Prior 2018),” and contains one set of actions. The Guide has been updated to follow this change.</p>	<p>N/A</p>
<p>“Clone Assignment” is an added feature beginning in 2018. The Guide has been updated to reflect this.</p>	<p>N/A</p>

Using the Schools Utility

The Schools Utility provides a way for you to set up schools and CRDC Local Education Agency Identification (LEAID) numbers. A Local Education Agency (LEA) is equivalent to a school district. The LEAID is your district's seven-digit National Center for Education Statistics (NCES) LEAID identification code. You map the HR Buildings to schools in the Extract Template.

Note Smaller school districts may only have one LEAID number even if they have more than one school building. In Student Management, all grades must be selected for all Entities that share an LEAID.

Note If your district is using Skyward Student Management and Skyward Human Resources (a combined Finance/Student database), your Student staff should manage adding the LEAID in the Student Setup School Characteristics area.

When you add and update schools in this utility, you automatically see the changes in the Student Setup Schools Characteristics option (Student Management\Federal/State Reporting\FR\FO\PF\SS).

Caution  Because you are working directly in the Schools table, you may want to consider limiting Security levels to Access Level 3 (Inquire, Add, Change) and Lookup Level 2 (Inquire, Change) for any employees using this utility. See the *WSIPC Guide to Security* to learn more about changing Security levels.

Tip The Schools screen retains the schools you added for previous data collections. Therefore, you may not need to add any new schools for your district. Review the information on the Schools screen to determine whether changes are necessary.

To use the Schools Utility to add or update school information:

1. Go to Human Resources\Federal/State Reporting\FR\FO\Utilities\Schools.

Note The Schools table lists all in-district and out-of-district schools your students attend now or attended in the past. Out-of-district schools and in-district buildings appear on the list without LEAID values. You can disregard the out-of-district schools. *If all in-district schools are present and the detail is correct, you do not need to proceed with the next step.*

2. Click Add.
3. In the School Id box, enter the HR Building Code used in Employee Management Assignments.
4. In the LEAID box, enter the corresponding CRDC designated LEAID Code for the school.

Note You only need to enter a corresponding Local Education Agency (LEAID) Code for your district schools.

Tip The LEAID is a seven-digit number listed as the NCES District ID. The NCES School ID is twelve digits in length. (The first seven numbers are the LEAID number and the last five numbers identify the school.)

You can verify your school's LEAID\NCES District ID at the following website:

<http://nces.ed.gov/ccd/schoolsearch/>

Your district likely received the school LEAID numbers in a letter, and you may also find these numbers when you sign in to the Federal Advanced website.

5. In the School Name box, enter the corresponding school name.
6. Click Save.

Figure 1 shows an example list of district schools/buildings with LEAID numbers and out-of-district schools without LEAID numbers.

School ID ▲	LEAID	School Name
110	01359	North Elementary
120	01358	East Elementary
130	01360	South Elementary
140	01361	West Elementary
150	01357	Central Elementary
210	02471	Skyward MS
220	02473	WSIPC MS
230	02472	WESPac MS
310	02470	Emerald MS
410	03585	Emerald HS
420	03586	Green HS
8174		Chinook MS
8270		Grant MS
9170		West Seattle HS
9174		Bellevue HS
9274		Central Avenue Elementary

Figure 1 - Schools screen

CRDC Processing

CRDC Processing is a multi-step process. You must complete the steps in the following order.

- [Extract Civil Rights Data](#)
- [Maintain Extracted Civil Rights Data](#)
- [Export Civil Rights Data](#)
- [View/Save Locally for Federal Transfer](#)

If your district is using Skyward Student Management and Skyward Human Resources (a combined Finance/Student database), the Student side should perform the last two steps. For tips about the Extract, see "[Appendix A – Extract Tips](#)" (page 57).

Extract Civil Rights Data

This is an overview of the process to extract information for CRDC Reporting. The sections after the following overview contain detailed information about the data selection for extraction.

1. Go to Human Resources\Federal/State Reporting\FR\FO\PE\EC.

Note	If, for any reason, you must run the CRDC process for years prior to the 2017-2018 submission year, use the Part 1 or Part 2 Extract functions marked "(Prior 2018)" and contact WSIPC for a copy of the older guide that describes the older process.
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2. Click Add.
3. Configure the Extract Template Settings screen. The sections following this procedure provide descriptions of the options in each area of this screen.

Note	During template setup, all data elements within each section are required, as noted on the screen with an asterisk (*). The template cannot be saved until you select a data element in each area.
-------------	--

4. Verify your selected options are correct, and you have selected each data element (such as Assignments or Duty Codes) for each area of the template.

5. Click Save and Print.

Note The printing step populates the data on the Maintain Extracted Civil Rights Data screen.

6. When the process is complete, click View Report. The Civil Rights Data Extraction Report lists information by category, school, and employee.
7. Review the data on each page. If you need to modify your selection parameters, edit your existing template.

Tip Consider perfecting the STAF and SECR section data first, then concentrate on EXPD sections. Because the EXPD sections require some manual entry of data, this approach can alleviate the need for data re-entry.

8. Continue to "[Maintain Extracted Civil Rights Data](#)" (page 55).

Tip Save the Extract Report to the location of your choice so you have a record of what was extracted. This is particularly important when running the final Extract.

Extract Options and Parameters

This section contains information about CRDC Template Settings, Extract Options, and Extraction Parameters.

Figure 2 shows the Extract Options for the Extract Template Settings screen. Table 1 describes the options in this area of the screen and provides recommended settings.

The screenshot displays two main sections of the CRDC Reporting interface:

- Template Settings:**
 - * Template Description: CRDC Reporting Year X
 - Share with other users in the district
 - Print Greenbar
- Extract Options:**
 - * Selection Parameters: Default Parameters
 - Extraction Parameters:**
 - School Year: [Dropdown]
 - * Select Buildings: [Map Buildings to Schools]
 - * Select FTE Type used for Calculations:
 - Assignment FTE
 - Calculated FTE
 - State FTE
 - [Select Employee Management Plans]
 - PARA PAYROLL
SUPPLEMENTALS
TEACHER BASE

Figure 2 - Extract Options and Parameters

AREA	PURPOSE OF AREA
Template Settings	Defines aspects about the template, including the Name (description) of the template and whether the template should be shared with other users in the district.
AREA	PURPOSE OF AREA
Extract Options	Defines selection criteria for the extract.
Options in this Area	Description of Options
Selection Parameters	Defines which employees to report on. Use the Default Parameters.
School Year	Select the CRDC collection year as defined in the Office of Civil Right Announcements and systems.
Select Buildings	<p>Defines which buildings are associated with which schools in your district. Report totals are displayed by building.</p> <p>You must map (associate) your HR buildings (schools) to CRDC reportable district schools. HR Buildings are mapped to Student Schools. Schools are mapped to a Local Education Agency ID (LEAID) CRDC building. See "Using the Schools Utility" (page 5) to learn more about LEAID.</p>

Options in this Area	Description of Options
Select FTE Type used for Calculations	<p>Select Calculated FTE because the process is designed to extract the <i>Calc FTE from the Assignment Breakdown</i>. The FTE data is reported by school (building) for teachers and counselors.</p> <p>Note: If review of the Extract Report returns some employees with Salary totals, but 0 FTE, the Do Not use calendar to find Calc FTE and Use FTE instead of Calc FTE to calculate pay amounts boxes are likely selected on their assignment in the chosen EM/SN Plan. You may want to run the SPI Browse Utility ("SPI Browse Utility" on page 58) for schools that have 0 FTE, and manually enter the results as corrections on the Maintain screen ("Maintain Extracted Civil Rights Data" on page 53.)</p>
Select Employee Management Plans	<p>Defines which Employee Management Plans to use for the source of FTE data for teachers, school counselors, sworn law enforcement officers, security guards, nurses, psychologists, and social workers. Select the EM or SN Plan or Plans that best encapsulate this data for the CRDC reporting period.</p> <p>The extract process will extract data for every Person Record contained in each Employee Management plan selected. If the same data for an employee is present within multiple selected plans, the process <i>will</i> duplicate data. This results in increased salary amounts and FTE. Careful selection of plans will avoid this issue.</p>

Table 1 - Description of Extract Options

STAF-1 Teachers – FTE Count and Certification

This section contains information about CRDC Element STAF-1.1, STAF-1.2, and STAF-1.3 Teachers – FTE Count and Certification.

- STAF-1 contains teacher FTE counts, both certificated and non-certificated teachers, for the specified reporting year.

Figure 3 shows the STAF-1 detail selection area of the Extract Template Settings screen. Table 2 describes the options in this area and provides recommended settings.

STAF-1 Teachers - FTE Count and Certification

Select Assignments and Certifications that apply to the Classroom Teacher Certification

* **Assignments:** Assignments Parameters have been Selected

* **Duty:** Duty Codes have been Selected

* **Certifications:** Certifications Parameters have been Selected * As of Date: 06/30/2018

Figure 3 – STAF-1 Teachers – FTE Count and Certifications

AREA	PURPOSE OF AREA
STAF1 Teachers – FTE Count and Certification	Defines the assignments and certifications to report on for classroom teachers. This data will fulfill CRDC Elements STAF-1.1, STAF-1.2, and STAF-1.3
Options in this Area	Description of Options
Assignments	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 27 Teaching <p>The process is designed to extract data from the Assignment Breakdown of the selected EM plans, based on Activity Code.</p>
Duty	<p>Select all Teacher Base Duty Codes from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310 Elem. Teacher-Base ▪ 320 Secondary Teacher-Base ▪ 330 Oth. Teacher-Base ▪ 340 Elem. Teacher-Specialist ▪ 520 Sub. Teacher-Base ▪ 630 Contractor Teacher <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Certifications	<p>Select OSPI Certificate types (this is the description you see in the selection list). The data is extracted based on the Certification Type listed on the Employee Profile Certification tab. <i>Select any Certificate Type appropriate for Teachers.</i></p>

Options in this Area	Description of Options
As of Date	<p>Enter the OSPI designated Certification Expiration Date (6/30/XX) that falls at the end of the CRDC reporting period. For Example, if the Reporting Year is 2017-2018, this date will be "6/30/2018." The Employee Profile Certification Expiration Date must be blank, or greater than or equal to the As of Date, for the employee to be included.</p> <p>Employees with blank Certification Expiration Dates <i>are</i> included in the extract.</p> <p>Employees with Certification Expiration Dates prior to the As of Date <i>are not</i> included in the extract.</p>

Table 2 - Description of selection choices for the STAF-1 Teachers – FTE Count and Certifications section.

STAF-2 Teacher Years of Experience

This section contains information about the options for CRDC Elements STAF-2.1 and STAF-2.2

- STAF-2 contains FTE counts for teachers in their first year of teaching and teachers in their second year of teaching.

Figure 4 shows the STAF-2 Teacher Years of Experience area of the Extract Template Settings screen. Table 3 describes the options in this area and provides recommended settings.

STAF-2 Teacher Years of Experience

Select Assignments and the calculation method for years of experience to apply to the Teacher Years of Experience

* **Assignments:** Assignments Parameters have been Selected Clone Assignments from STAF-1

* **Duty:** Duty Codes have been selected

* Calculate Years of Experience: Select Years of Experience

* Have Years of Experience values been rolled since the end of the last school year:

Yes - Subtract 1 Year from the YOE total
 No - Do not change YOE total

Figure 4 - STAF-2 Teacher Years of Experience

AREA	PURPOSE OF AREA
STAF-2 Teacher Years of Experience	Defines the assignments and experience to report on for teachers.
Options in this Area	Description of Options
Assignments	<p>Use "Clone Assignments from STAF-1" to clone the assignment selected in STAF-1 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown based on the Activity Code selected in STAF-1.</p>
Duty	<p>Select all Teacher Base duty codes from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310 Elem. Teacher-Base ▪ 320 Secondary Teacher-Base ▪ 330 Oth. Teacher-Base ▪ 340 Elem. Teacher-Specialist ▪ 520 Sub. Teacher-Base ▪ 630 Contractor Teacher <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Calculate Years of Experience	<p>Use the Select Years of Experience button to open the parameter. Select the WA State Total check box. This will extract from the WA State Total listed on the Profile WA – Experience tab. Based on your district’s use of the Skyward Years of Experience area, you may see the additional selection options.</p>

Options in this Area	Description of Options
<p>Have Years of Experience values been rolled since the end of the last school year</p>	<p>Set to No – Do not change YOE (Years of Experience) total.</p> <p>The extract uses the WA State Total Experience. You should have already updated Experience pertaining to the reporting year during the last Budget cycle.</p> <p>The CRDC instructions for STAF-2 specify that you should include experience earned during that reporting year.</p> <p>Note: The extract is typically due before the next budget cycle when another year of experience is added.</p>

Table 3 - Description of selection choices for the STAF-2 Teacher Years of Experience section.

STAF-3 Teacher Absenteeism

This section contains information about the options for CRDC Element STAF-3 – Teacher Absenteeism.

- STAF-3 will extract the Number of FTE teachers who were absent more than 10 school days during the school year.

Figure 5 shows the STAF-3 Teacher Absenteeism area of the Extract Template Settings screen. Table 4 describes the options in this area, and provides recommended settings.

STAF-3 Teacher Absenteeism

Select Assignments, Time Off Codes, and the Calendar that will be used to calculate Teacher absenteeism

* Assignments: Assignments Parameters have been Selected Clone Assignments from STAF-1

* Duty: Duty Codes have been selected

* Time Off Codes: Time Off Codes Parameters have been Selected

* Calendar: CERTIFICATED BASE 2018-2019

Figure 5 - STAF-2 Teacher Absenteeism

Options in this Area	Description of Options
Assignments	<p>Use the Clone Assignments from STAF-1 button to clone the assignment selected in STAF-1 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown based on the Activity Code selected in STAF-1.</p>
Duty Codes	<p>Select all Teacher Base duty codes from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310 Elem. Teacher-Base ▪ 320 Secondary Teacher-Base ▪ 330 Oth. Teacher-Base ▪ 340 Elem. Teacher-Specialist ▪ 520 Sub. Teacher-Base ▪ 630 Contractor Teacher <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Time Off Codes	<p>Select appropriate Used (U) and Unpaid (L) Type Time Off Codes (such as sick leave or personal leave) for teachers.</p> <p>Do not include administratively approved leave for professional development, field trips, or other off-campus activities with students.</p>
Calendar	<p>Select one representative full time (180 day) Certificated Teaching calendar.</p> <p>Note: Even though certificated staff may be on different calendars, select only one calendar.</p>

Table 4 - Description of options and recommended settings for STAF-3 section of the Extract Template

STAF-4 School Counselors

This section contains information about the options for CRDC Element STAF-4 – School Counselors Number FTE.

- STAF-4 will extract FTE counts for school counselors for the specified reporting year.

Figure 6 shows the area for STAF-4 School Counselors on the Extract Template Settings screen. Table 5 describes the options in this area of the screen and provides recommended settings.

STAF-4 School Counselors

Select Assignments that apply to the School Counselors

* **Assignments:** Assignments Parameters have been Selected Our district does not have School Counselors.

* **Duty Codes:** No Duty Codes have been Selected

Figure 6 - STAF-4 School Counselors section of the Extract Template screen

AREA	PURPOSE OF AREA
School Counselors	Defines the assignments to report on for school counselors.
Options in this Area	Description of Options
Assignments	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> 24 Guidance and Counseling <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
Duty Codes	<p>Select the following Counselor Base duty code from the Breakdown Duties list:</p> <ul style="list-style-type: none"> 420 Counselor-Base <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Our district does not have School Counselors	Select this check box if your district does not have any school counselors.

Table 5 - Description of options and recommended settings for STAF-4 section of the Extract Template

STAF-5 Support Services Staff

This section contains information about the options for CRDC Element STAF-5.1, STAF-5.2, and STAF-5.3 – Support Services Staff FTE.

- STAF-5 will extract FTE counts for nurses, psychologists, and social workers.

Figure 7 shows the area for STAF-5 Support Services Staff section of the Extract Template Settings screen. Table 6 describes the options in this area of the screen and provides recommended settings.

STAF-5 Support Services Staff

Select Assignments that apply to the Nurses

* **Assignments:** Assignments Parameters have been Selected Our district does not have Nurses.

* **Duty Codes:** Duty Codes have been Selected

Select Assignments that apply to the Psychologist

* **Assignments:** Assignments Parameters have been Selected Our district does not have Psychologist.

* **Duty Codes:** Duty Codes have been Selected

Select Assignments that apply to the Social Workers

* **Assignments:** Assignments Parameters have been Selected Our district does not have Social Workers.

* **Duty Codes:** Duty Codes have been Selected

Figure 7 - STAF-5 Support Services Staff on the Extract Template screen

AREA	PURPOSE OF AREA
STAF-5 Support Services Staff	Defines the assignments to report on nurses, psychologists, and social workers.
Options in this Area	Description of Options
Nurses	
Assignments	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> 26 Health/Related Services <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>

Options in this Area	Description of Options
Duty Codes	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 470 Nurse-Base <p>Note: If your district doesn't use the 470 Nurse-Base Code, select the Duty Code that your assignments use for nurses.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Our district does not have Nurses	<p>Select this check box if your district does not have any nurses.</p>
Psychologists	
Assignments	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 26 Health/Related Services <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
Duty Codes	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 460 Psychologist-Base <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Our district does not have Psychologist	<p>Select this check box if your district does not have a psychologist.</p>
Social Workers	
Assignments	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 26 Health/Related Services <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>

Options in this Area	Description of Options
Duty Codes	Select the following from the Breakdown Duties list: <ul style="list-style-type: none"> ▪ 440 Social Worker-Base The process is designed to extract data from the Assignment Breakdown based on Duty Code.
Our district does not have Social Workers	Select this check box if your district does not have any social workers.

Table 6 - Description of options and recommended settings for STAF-5 section of the Extract Template screen

STAF-6 Current Year and Previous Year Teachers

This section contains information about the options for CRDC Element STAF-6.1 and STAF-6.2 – Current Year and Previous Year Teachers.

- STAF-6 produces a count of current year and previous year teachers.

Figure 8 shows the area for STAF-6 Current Year and Previous Year Teachers section of the Extract Template Settings screen. Table 7 describes the options in this area of the screen and provides recommended settings.

STAF-6 Current Year and Previous Year Teachers

Select Assignments that apply to the Current Year Teachers

* **Assignments:** Assignments Parameters have been Selected Clone Assignments from STAF-1

* **Duty Codes:** Duty Codes have been Selected

Selections that apply to the Prior Year Teachers

Select Prior Employee Management Plans 16-17 EM for Payroll (Sept-Aug) ⋮

* **Assignments:** Assignments Parameters have been Selected Clone Assignments from STAF-1

* **Duty Codes:** Duty Codes have been Selected

Figure 8 - STAF-6 Current Year and Previous Year Teachers on the Extract Template screen

AREA	PURPOSE OF AREA
STAF-6 Current Year and Previous Year Teachers	Defines the information to report the number of current year teachers and previous year teachers.
Options in this Area	Description of Options
Current Year Teachers	
Assignments	<p>Use the Clone Assignments from STAF-1 button to clone the assignment selected in STAF-1 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in STAF-1.</p>
Duty	<p>Select all Teacher Base duty codes from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310 Elem. Teacher-Base ▪ 320 Secondary Teacher-Base ▪ 330 Oth. Teacher-Base ▪ 340 Elem. Teacher-Specialist ▪ 520 Sub. Teacher-Base ▪ 630 Contractor Teacher <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Previous Year Teachers	
Select Prior Employee Management Plans	<p>Defines which Employee Management Plans to use for extracting FTE data for previous year teachers. Select the plan year and EM or SN Plan or Plans that best encapsulate this data <i>for the CRDC reporting period</i>.</p> <p>Example: If CRDC reporting year is 2017-2018, select 2016 EM or SN plans. The software will default to the year prior to the plan year selected in the Extraction Parameters, but this can be overridden by user selection.</p>

Options in this Area	Description of Options
Assignments	<p>Use the Clone Assignments from STAF-1 button to clone the assignment selected in STAF-1 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Previous Year EM Plan, based on the Activity Code selected in STAF-1.</p>
Duty Codes	<p>Select all Teacher Base duty codes from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310 Elem. Teacher-Base ▪ 320 Secondary Teacher-Base ▪ 330 Oth. Teacher-Base ▪ 340 Elem. Teacher-Specialist ▪ 520 Sub. Teacher-Base ▪ 630 Contractor Teacher <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>

Table 7 - Description of options and recommended settings for STAF-6 section of the Extract Template screen

SECR-1 Security Staff

This section contains information about the options for CRDC Element SECR-1.1 and SECR 1.2 – Security Staff.

- SECR-1 produces Number of FTE sworn law enforcement officers and security guards for the selected reporting year.

Figure 9 shows the SECR-1 Security Staff area of the Extract Template Settings screen. Table 8 describes the options in this area of the screen and provides recommended settings.

SECR-1 Security Staff	
Select Assignments that apply to the Sworn Law Enforcement Officers	
* Assignments: Assignments Parameters have been Selected	<input type="checkbox"/> Our district does not have Sworn Law Enforcement Officers.
* Duty Codes: Duty Codes have been Selected	
Select Assignments that apply to Security Guards	
* Assignments: Assignments Parameters have been Selected	<input type="checkbox"/> Our district does not have Security Guards.
* Duty Codes: Duty Codes have been Selected	

Figure 9 - SECR-1 section of the Extract Template screen

AREA	PURPOSE OF AREA
SECR-1 Security Staff	Defines the information to report the number of current year teachers and previous year teachers.
Options in this Area	
Description of Options	
Sworn Law Enforcement Officers	
<p>Note: You may not have sworn law enforcement officers at your district or in your Employee Management Plans. Because options must be selected, you can select the same values here as for security guards below.</p>	
Assignments	Select the following from the Assignments list: <ul style="list-style-type: none"> ▪ 25 Pupil Management & Safety ▪ 67 Building & Property Security
Duty	Select the following from the Breakdown Duties list: <ul style="list-style-type: none"> ▪ 960 Prof.-Base ▪ 970 Service Worker-Base <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Our district does not have Sworn Law Enforcement Officers	Select this check box if your district does not have any sworn law enforcement officers.

Options in this Area	Description of Options
Security Guards	
Assignments	Select the following from the Assignments list: <ul style="list-style-type: none"> ▪ 25 Pupil Management & Safety ▪ 67 Building & Property Security The process is designed to extract data from the Assignment Breakdown based on Activity Code.
Duty Codes	Select the following from the Breakdown Duties list: <ul style="list-style-type: none"> ▪ 960 Prof.-Base ▪ 970 Service Worker-Base The process is designed to extract data from the Assignment Breakdown based on Duty Code.
Our district does not have Security Guards	Select this check box if your district does not have any security guards.

Table 8 - Description of options and recommended settings for SECR-1 section of the Extract Template screen

EXPD-1 Salary Amounts for Total Personnel Funded with State and Local Funds

This section contains information about the options for CRDC Element EXPD-1-Salary Amount for Total Personnel funded with State and Local Funds.

- EXPD-1 produces a total salary amount for all personnel funded with state and local funds.

Figure 10 shows the EXPD-1 Salary Amount for Total Personnel Funded with State and Local Funds area of the Extract Template Settings screen. Table 9 describes the options in this area of the screen and provides recommended settings.

EXPD-1 Salary Amount for Total Personnel Funded with State and Local Funds

Select Assignments that will be used to calculate School Finance Data

* Program at School Level: Program Codes have been selected

* Assignments for Total Personnel: Assignments Parameters have been Selected

* Duty: Duty Codes have been Selected

* Account Ranges:

Figure 10 - EXPD-1 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-1 Salary Amount for Total Personnel Funded with State and Local Funds	Defines the Assignments to report on for instructional staff, support services staff, and school administration staff funded with State and Local funds.
Options in this Area	Description of Options
Program at School Level (not Special Education or Federal programs)	<p>Select from the Positions list, all Program/Sub-Program Codes (not Special Education or Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ 02 Basic Ed-Alter Learning Ex ▪ 31 Vocational-Basic-State ▪ 34 Middle School Career and Technical Education-State ▪ 39 Vocational-Other Categorical ▪ 45 Skills Center-Basic-State ▪ 55 Learning Assistance Program-State ▪ 56 State Institutions, Centers, and Homes-Delinquent ▪ 58 Special and Pilot Programs-State ▪ 59 Institutions-Juveniles in Adult Jails ▪ 65 Transitional Bilingual-State ▪ 69 Compensatory-Other ▪ 71 Traffic Safety ▪ 73 Summer School ▪ 74 Highly Capable ▪ 75 Professional Development-State ▪ 79 Instructional Programs-Other <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>

Options in this Area	Description of Options
<p>Assignments for Total Personnel</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 11 Board of Directors ▪ 12 Superintendent’s Office ▪ 21 Supervision (Instruction) ▪ 22 Learning Resources ▪ 23 Principal’s Office ▪ 24 Guidance and Counseling ▪ 25 Pupil Management & Safety ▪ 26 Health/Related Services ▪ 27 Teaching ▪ 28 Extracurricular ▪ 31 Instructional Prof Develop ▪ 32 Instructional Technology ▪ 33 Curriculum <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
<p>Duty</p>	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 110-254 ▪ 310-494 ▪ 520-524 ▪ 630, 640 ▪ 910, 913 ▪ 940, 943 ▪ 980, 983 <p>Note: Verify that the All Breakdown Duties check box is cleared in the top left of the select screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>

Options in this Area	Description of Options
Account Range Filter	<p>The intent of the Account Range Filter is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections chosen within this area, will work within the selection parameters chosen for the section.</p>
Source Expense Account Ranges	<p>Source Expense Account Ranges:</p> <p>Low Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 0100 21 2000 000 0000 0000 0 <p>High Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 7999 32 3999 999 9999 9999 9
Level Ranges	<p>Do not modify the Level Ranges.</p>
Exclude Filter	<p>Exclude Filter for Dimension PPSS/Prj/Club:</p> <ul style="list-style-type: none"> ▪ 1100 to 1299 ▪ 1400 to 1999 ▪ 2000 to 2999 ▪ 3800 to 3899 ▪ 4600 to 4699 ▪ 5100 to 5499 ▪ 5700 to 5799 ▪ 6100 to 6499 ▪ 6700 to 6899 ▪ 7600 to 7899 <p>The Exclude Filters exclude the Federal programs and sub-programs because EXPD-1 is for salary expenditures funded with state and local funds.</p>
Include Filter	<p>Do not modify the Include Filter.</p>

Table 9 - Description of options and recommended settings for EXPD-1 section of the Extract Template screen

EXPD-2 Salary Amounts for Teachers Funded with Federal, State, and Local Funds

This section contains information about the options for CRDC Element EXPD-2 – Salary Amount for Teachers Funded with Federal, State and Local Funds.

- EXPD-2 produces a total salary amount for *teachers* funded with federal, state, and local funds.

Figure 11 shows the EXPD-2 area of the Extract Template Settings screen. Table 10 describes the options in this area of the screen and provides recommended settings.

EXPD 2 - Salary Amount for Teachers Funded with Federal, State, and Local Funds

Select Assignments that apply to the Teachers

* Program for Teachers: Program Codes have been selected

* Assignments for Teachers: Assignments Parameters have been Selected Clone Assignments from STAF-1

* Duty: Duty Codes have been Selected

* Account Ranges: Select Account Ranges

Figure 11 - EXPD-2 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-2 Salary Amount for Teachers Funded with Federal, State, and Local Funds	Defines the Assignments to report on for teacher salary expenditures funded with federal, state, and local funds
Options in this Area	Description of Options
Program for Teachers	<p>Select from the Positions list, all Program/Sub-Program Codes (including Special Education and Federal programs):</p> <ul style="list-style-type: none"> 01 Basic Education Through 79 Instructional Programs-Other <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>

Options in this Area	Description of Options
Assignments for Teachers Only	<p>Use the Clone Assignments from STAF-1 button to clone the assignment selected in STAF-1 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in STAF-1.</p>
Duty	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310-344 ▪ 520-524 ▪ 630 <p>Note: Verify that the All Breakdown Duties check box is cleared in the top left of the select screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Account Range Filter	<p>The intent of the Account Ranges is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections chosen within this area, will work within the selection parameters chosen for the section.</p>
Source Expense Account Ranges	<p>Source Expense Account Ranges:</p> <p>Low Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 0100 21 2000 000 0000 0000 0 <p>High Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 7999 32 3999 999 9999 9999 9
Level Ranges	Do not modify the Level Ranges.
Exclude Filter	Do not modify the exclude Filter
Include Filter	Do not modify the Include Filter.

Table 10 - Description of options and recommended settings for EXPD-2 section of the Extract Template screen

EXPD 3 Full-time Equivalency Count and Salary Amounts for Teachers Funded with State and Local Funds

This section contains information about the options for CRDC Element EXPD-3.1 and EXPD-3.2 – Full-time Equivalency Count and Salary Amount for Teachers Funded with State and Local Funds.

- EXPD-3 produces a full-time equivalency count and salary amount for teachers funded with state and local funds.

Figure 12 shows the EXPD-3 area of the Extract Template Settings screen. Table 11 describes the options in this area of the screen and provides recommended settings.

EXPD 3 - Full-time Equivalency Count and Salary Amount for Teachers Funded with State and Local Funds
 Select Assignments that will be used to calculate Teacher only School Finance Data
 * Program for Total Personnel: Program Codes have been selected
 * Assignments for Teachers Only: Assignments Parameters have been Selected
 * Duty: Duty Codes have been Selected
 * Account Ranges: Select Account Ranges
 Clone Assignments from EXP-2

Figure 12 - EXPD-3 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD 3 Full-time Equivalency Count and Salary Amount for Teachers Funded with State and Local Funds	Defines the Assignments to report on for teacher salary expenditures funded with State and Local Funds.

Options in this Area	Description of Options
<p>Program for Total Personnel</p> <p>(not Special Education or Federal programs)</p>	<p>Select from the Positions list, all Program/Sub-Program Codes (not Special Education or Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ 02 Basic Ed-Alter Learning Ex ▪ 31 Vocational-Basic-State ▪ 34 Middle School Career and Technical Education-State ▪ 39 Vocational-Other Categorical ▪ 45 Skills Center-Basic-State ▪ 55 Learning Assistance Program-State ▪ 56 State Institutions, Centers, and Homes-Delinquent ▪ 58 Special and Pilot Programs-State ▪ 59 Institutions-Juveniles in Adult Jails ▪ 65 Transitional Bilingual-State ▪ 69 Compensatory-Other ▪ 71 Traffic Safety ▪ 73 Summer School ▪ 74 Highly Capable ▪ 75 Professional Development-State ▪ 79 Instructional Programs-Other <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>
<p>Assignments for Teachers Only</p>	<p>Use the Clone Assignments from EXPD-2 button to clone the assignment selected in EXPD-2 into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in EXPD-2.</p>

Options in this Area	Description of Options
Duty	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 310-344 ▪ 520-524 ▪ 630 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Account Range Filter	<p>The intent of the Account Ranges is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections chosen within this area, will work within the selection parameters chosen for the section.</p>
Source Expense Account Ranges	<p>Source Expense Account Ranges:</p> <p>Low Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 0100 21 2000 000 0000 0000 0 <p>High Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 7999 32 3999 999 9999 9999 9
Level Ranges	<p>Do not modify the Level Ranges.</p>

Options in this Area	Description of Options
Exclude Filter	<p>Select the PPSS/Prj/Club dimension, enter each bullet range, then select Save and add another:</p> <ul style="list-style-type: none"> ▪ 1100 to 1299 ▪ 1400 to 1999 ▪ 2000 to 2999 ▪ 3800 to 3899 ▪ 4600 to 4699 ▪ 5100 to 5499 ▪ 5700 to 5799 ▪ 6100 to 6499 ▪ 6700 to 6899 ▪ 7600 to 7899 <p>The Exclude Filters exclude the Federal programs and sub-programs because EXPD 3 is for salary expenditures funded with state and local funds.</p>
Include Filter	Do not modify the Include Filter.

Table 11 - Description of options and recommended settings for EXPD-3 section of the Extract Template screen

EXPD-4 Full-time Equivalency Count and Salary Amounts for Staff Funded with State and Local Funds

This section contains information about the options for CRDC Element EXPD-4.1, EXPD-4.2, EXPD-4.3, EXPD-4.4, EXPD-4.5, and EXPD-4.6 - Full-time Equivalency Count and Salary Amounts for Staff Funded with State and Local Funds.

- EXPD-4 produces a full-time equivalency count and salary amount for staff funded with state and local funds. The selections are broken up by Instructional Aides, Support Service Staff, and School Administration Staff.

Figure 13 shows the EXPD-4 area of the Extract Template Settings screen. Table 12 describes the options in this area of the screen and provides recommended settings.

EXPD-4 Full-time Equivalency Count and Salary Amount for Staff Funded with State and Local Funds

Select Assignments that apply to Instructional Aides

* Program for Instructional Aides:

* Assignments for Instructional Aides:

* Duty:

Select Assignments that apply to Support Services Staff

* Program for Support Services Staff:

* Assignments for Support Services Staff:

* Duty:

Select Assignments that apply to School Administration Staff

* Program for School Administration Staff:

* Assignments for School Administration Staff:

* Duty:

* Account Ranges:

Figure 13 - EXPD-4 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD 4 Full-time Equivalency Count and Salary Expenditures for Staff Funded with State and Local Funds	Defines the Assignments to report on for instructional aides, nurses, psychologists, social workers, and administrators for FTE and salary expenditures funded with state and local funds.

Options in this Area	Description of Options
<p>Assignments for Instructional Aides</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 21 Supervision (Instruction) ▪ 22 Learning Resources ▪ 23 Principal’s Office ▪ 24 Guidance and Counseling ▪ 25 Pupil Management & Safety ▪ 26 Health/Related Services ▪ 27 Teaching ▪ 28 Extracurricular ▪ 31 Instructional Prof Develop ▪ 32 Instructional Technology ▪ 33 Curriculum <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
<p>Duty</p>	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 910, 913 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>

Options in this Area	Description of Options
<p>Assignments for Support Services Staff</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 21 Supervision (Instruction) ▪ 22 Learning Resources ▪ 23 Principal’s Office ▪ 24 Guidance and Counseling ▪ 25 Pupil Management & Safety ▪ 26 Health/Related Services ▪ 27 Teaching ▪ 28 Extracurricular ▪ 31 Instructional Prof Develop ▪ 32 Instructional Technology ▪ 33 Curriculum <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
<p>Duty</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 400-494

Options in this Area	Description of Options
<p>School Administration Staff</p>	
<p>Program for School Administration Staff (not Special Education or Federal programs)</p>	<p>Select from the Positions list, all Program/Sub-Program Codes (not Special Education or Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ 02 Basic Ed-Alter Learning Ex ▪ 31 Vocational-Basic-State ▪ 34 Middle School Career and Technical Education-State ▪ 39 Vocational-Other Categorical ▪ 45 Skills Center-Basic-State ▪ 55 Learning Assistance Program-State ▪ 56 State Institutions, Centers, and Homes-Delinquent ▪ 58 Special and Pilot Programs-State ▪ 59 Institutions-Juveniles in Adult Jails ▪ 65 Transitional Bilingual-State ▪ 69 Compensatory-Other ▪ 71 Traffic Safety ▪ 73 Summer School ▪ 74 Highly Capable ▪ 75 Professional Development-State ▪ 79 Instructional Programs-Other <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>

Options in this Area	Description of Options
<p>Assignments for School Administration Staff</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 11 Board of Directors ▪ 12 Superintendent’s Office ▪ 13 Business Office ▪ 14 Human Resources ▪ 23 Principal’s Office <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
<p>Duty</p>	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 110-134 ▪ 210-254 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
<p>Account Range Filter</p>	<p>The intent of the Account Ranges is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections chosen within this area, will work within the selection parameters chosen for the section.</p>
<p>Source Expense Account Ranges</p>	<p>Source Expense Account Ranges:</p> <p>Low Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 0100 21 2000 000 0000 0000 0 <p>High Account:</p> <ul style="list-style-type: none"> ▪ 10 * 530 7999 32 3999 999 9999 9999 9
<p>Level Ranges</p>	<p>Do not modify the Level Ranges.</p>

Options in this Area	Description of Options
Exclude Filter	<p>Select the PPSS/Prj/Club dimension, enter each bullet range, then select Save and add another:</p> <ul style="list-style-type: none"> ▪ 1100 to 1299 ▪ 1400 to 1999 ▪ 2000 to 2999 ▪ 3800 to 3899 ▪ 4600 to 4699 ▪ 5100 to 5499 ▪ 5700 to 5799 ▪ 6100 to 6499 ▪ 6700 to 6899 ▪ 7600 to 7899 <p>The Exclude Filters exclude the Federal programs and sub-programs because EXPD 4 is for salary expenditures funded with state and local funds.</p>
Include Filter	Do not modify the Include Filter

Table 12 - Description of options and recommended settings for EXPD 4 section of the Extract Template Settings screen

EXPD-5 Full-time Equivalency Count and Salary Amount for Staff Funded with Federal, State, and Local Funds

This section contains information about the options for CRDC Element EXPD-5.1, EXPD-5.2, EXPD-5.3, EXPD-5.4, EXPD-5.5, and EXPD-5.6 - Full-time Equivalency Count and Salary Amount for Staff Funded with Federal, State, and Local Funds.

- EXPD-5 extracts FTE counts and salary expenditures for instructional aides, support services staff, and administration staff funded with federal, state, and local funds.

Figure 14 shows the EXPD-5 area of the Extract Template Settings screen. Table 13 describes the options in this area of the screen and provides recommended settings.

EXPD-5 Full-time Equivalency Counts and Salary Amounts for Staff Funded with Federal, State and Local Funds

Select Assignments that apply to Instructional Aides

* Program for Instructional Aides: Program Codes have been selected

* Assignments for Instructional Aides: Assignments Parameters have been Selected Clone Assignments from EXPD-4 Aide

* Duty: Duty Codes have been Selected

Select Assignments that apply to Support Services Staff

* Program for Support Services Staff: Program Codes have been selected

* Assignments for Support Services Staff: Assignments Parameters have been Selected Clone Assignments from EXPD-4 Support

* Duty: Duty Codes have been Selected

Select Assignments that apply to School Administration Staff

* Program for School Administration Staff: Program Codes have been selected

* Assignments for School Administration Staff: Assignments Parameters have been Selected Clone Assignments from EXPD-4 Admin

* Duty: Duty Codes have been Selected

* Account Ranges: Select Account Ranges

Figure 14 - EXPD-5 Section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-5 Full-time Equivalency Counts and Salary Amounts for Staff Funded with Federal, State and Local Funds	Defines the Assignments to report on for instructional aides, nurses, psychologists, social workers, and administrators for FTE and salary expenditures.
Options in this Area	Description of Options
Instructional Aides	
Program for Instructional Aides	<p>Select from the Positions list, all Program/Sub-Program Codes (including Special Education and Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ Through ▪ 79 Instructional Programs-Oth. <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>

Options in this Area	Description of Options
Assignments for Instructional Aides	<p>Use the Clone Assignments from EXPD-4 Aide button to clone the assignment selected into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in EXPD-4 Aide Assignments.</p>
Duty	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 910, 913 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Support Services Staff	
Program for Support Services Staff	<p>Select from the Positions list, all Program/Sub-Program Codes (including Special Education and Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ Through ▪ 79 Instructional Programs-Oth. <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>
Assignments for Support Services Staff	<p>Use the Clone Assignments from EXPD-4 Support button to clone the assignment selected into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in EXPD-4 Support Assignments.</p>

Options in this Area	Description of Options
Duty	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 440-444 (Social Workers) ▪ 460-464 (Psychologists) ▪ 470-474 (Nurses) <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
Administration Staff	
Program for School Administration Staff	<p>Select from the Positions list, all Program/Sub-Program Codes (including Special Education and Federal programs):</p> <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ Through ▪ 79 Instructional Programs-Oth. <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>
Assignments for School Administration Staff	<p>Use the Clone Assignments from EXPD-4 Admin button to clone the assignment selected into this section.</p> <p>The process is designed to extract data from the Assignment Breakdown from the EM Plan defined in Extract Options based on the Activity Code selected in EXPD-4 Admin Assignments.</p>
Duty	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 110-134 ▪ 210-254 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>

Options in this Area	Description of Options
Select Account Ranges	
Account Range Filter	The intent of the Account Ranges is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections chosen within this area, will work within the selection parameters chosen for the section.
Source Expense Account Ranges	Source Expense Account Ranges: Low Account: <ul style="list-style-type: none"> ▪ 10 * 530 0100 21 2000 000 0000 0000 0 High Account: <ul style="list-style-type: none"> ▪ 10 * 530 7999 32 3999 999 9999 9999 9
Level Ranges	Do not modify the Level Ranges.
Exclude Filter	Do not modify the exclude Filter
Include Filter	Do not modify the Include Filter.

Table 13 - Description of options and recommended settings for EXPD-5 on the Extract Template Settings screen

EXPD-6 Amount of Non-Personnel Expenditures Associated with Activities Funded with State and Local Funds

This section contains information about the options for CRDC Element EXPD-6 - Amount of Non-Personnel Expenditures Associated with Activities Funded with State and Local Funds.

- EXPD-6 reports on non-personnel expenditures funded with state and local funds.

Figure 15 shows the EXPD-6 are of the Extract Template Settings screen. Table 14 describes the options and provides recommended settings.

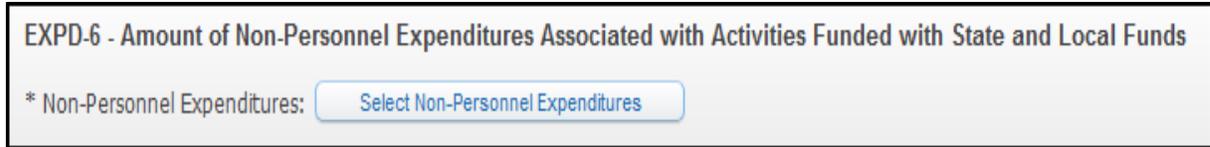


Figure 15 - EXPD-6 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-6 Amount of Non-Personnel Expenditures Associated with Activities Funded with State and Local Funds	Allows you to manually enter non-personnel expenditures funded with state and local funds.
Options in this Area	Description of Options
Non-Personnel Expenditures	<p>Include expenditures associated with instruction, instructional support, pupil support, and school administration, if this information is available at the school level. To learn more about expenditures, see the Finance section of the CRDC Definitions page on the CRDC website.</p> <p>"Entering Expenditures for EXPD-6" below this table shows you how to enter non-personnel expenditures.</p> <p>To learn how to obtain non-personnel expenditures by running Account Management Budgetary Data Mining Reports, see "Account Management Budgetary Data Mining Reports" (page 60).</p>

Table 14 - Description of options and recommended settings for EXPD-6 section of the Extract Template Settings screen

Entering Expenditures for EXPD-6

To enter expenditures for EXPD-6 in the Extract Template:

1. Click Select Non-Personnel Expenditures.
2. Select a school in the Select School box.

3. Manually enter the Non-Personnel Expenditure amounts in any of the following categories:
 - Professional Development
 - Instructional Materials/Supplies
 - Computers/Software/Technology
 - Contracted Services
 - Library Books/Media Center Materials
 - Other Non-Personnel Expenditures by School
4. Click Save and Switch Schools.
5. Repeat steps 2 through 4 to enter additional non-personnel expenditure amounts for each school.

Note

You can also enter information on the Maintain Extracted Civil Rights Data screen:

The advantage of entering information directly on the Maintain Extracted Civil Rights Data screen is that you enter one total for a selected school. However, values in the Extract template will override manually entered values on the Maintenance should you re-extract your file.

After running the Extract, go to [Maintain Extracted Civil Rights Data](#) and manually enter the total of non-personnel expenditures by school.

The other disadvantage of entering information this way is that the entries do not appear on the extract report.

EXPD-7 Amount of Non-Personnel Expenditures Associated with Activities Funded with Federal, State, and Local Funds

This section contains information about the options for CRDC Element EXPD-7 - Amount of Non-Personnel Expenditures Associated with Activities Funded with Federal, State, and Local Funds.

- EXPD-7 allows for entry of non-personnel expenditures funded with federal, state and local funds.

Figure 16 shows the EXPD-7 area of the Extract Template Settings screen. Table 15 describes the options in these areas of the screen and provides recommended settings.

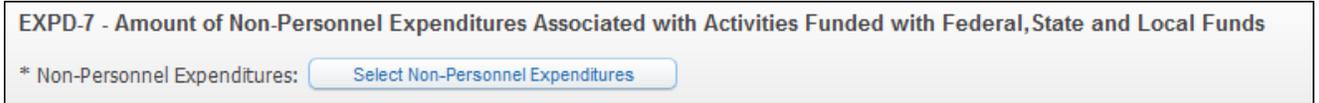


Figure 16 - EXPD-7 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-7 Amount of Non-Personnel Expenditures Associated with Activities Funded with Federal, State and Local Funds	Allows you to manually enter non-personnel expenditures associated with Federal, State, and Local funds.
Options in this Area	Description of Options
Non-Personnel Expenditures	Include expenditures associated with instruction, instructional support, pupil support, and school administration, if this information is available at the school level. To learn more about expenditures, see the Finance section of the CRDC Definitions page on the CRDC website. "Entering Expenditures for EXPD-7" below this table shows you how to enter non-personnel expenditures. To learn how to obtain non-personnel expenditures by running Account Management Budgetary Data Mining Reports, see "Account Management Budgetary Data Mining Reports" (page 60).

Table 15 - Description of options and recommended settings for EXPD-6 section of the Extract Template Settings screen

Entering Expenditures for EXPD-7

To enter expenditures for EXPD-7 in the Extract Template:

1. Click Select Non-Personnel Expenditures.
2. Select a school in the Select School box.
3. Manually enter the Activities amount.
4. Click Save and Switch Schools.
5. Repeat steps 2 through 4 to enter additional non-personnel expenditure amounts for each school.

Note You can also enter Information on the Maintain Extracted Civil Rights Data screen:

The advantage of entering information directly on the Maintain Extracted Civil Rights Data screen is that you enter one total for a selected school. However, values in the Extract template will override manually entered values on the Maintenance should you re-extract your file.

After running the Extract, go to [Maintain Extracted Civil Rights Data](#) and manually enter the total of non-personnel expenditures by school.

The other disadvantage of entering information this way is that the entries do not appear on the extract report.

EXPD-8 Salary Amount for Total Personnel Funded with Federal, State, and Local Funds

This section contains information about the options for CRDC Element EXPD-8-Salary Amount for Total Personnel funded with Federal, State, and Local Funds

- EXPD-8 extracts salary amount for total personnel funded with federal, state, and local funds.

Figure 17 shows the areas for EXPD-8 on the Extract Template Settings screen. Table 16 describes the options in these areas of the screen and provides recommended settings.

EXPD-8 - Salary Amount for Total Personnel Funded with Federal, State, and Local Funds

Select Assignments that apply to Total Personnel(Instructional, support services and school administration)

* Program for Total Personnel:

* Assignments for Total Personnel:

* Duty:

* Account Ranges:

Figure 17 - EXPD-8 section of the Extract Template Settings screen

AREA	PURPOSE OF AREA
EXPD-8 Salary Amount for Total Personnel Funded with Federal, State and Local Funds	Defines the Assignments to report on for instructional staff, support services staff, and school administration staff.
Options in this Area	Description of Options
Program for Total Personnel	Select from the Positions list, all Program/Sub-Program Codes (including Special Education and Federal programs): <ul style="list-style-type: none"> ▪ 01 Basic Education ▪ Through ▪ 79 Instructional Programs-Oth. <p>Note: Verify that the All Positions check box is cleared in the top left of the Positions screen.</p> <p>The process is designed to extract data from the Assignment Breakdown based on Program Code.</p>

Options in this Area	Description of Options
<p>Assignments for Total Personnel</p>	<p>Select the following from the Assignments list:</p> <ul style="list-style-type: none"> ▪ 11 Board of Directors ▪ 12 Superintendent’s Office ▪ 21 Supervision (Instruction) ▪ 22 Learning Resources ▪ 23 Principal’s Office ▪ 24 Guidance and Counseling ▪ 25 Pupil Management and Safety ▪ 26 Health/Related Services ▪ 27 Teaching ▪ 28 Extracurricular ▪ 31 Instructional Professional Development ▪ 32 Instructional Technology ▪ 33 Curriculum <p>The process is designed to extract data from the Assignment Breakdown based on Activity Code.</p>
<p>Duty</p>	<p>Select the following from the Breakdown Duties list:</p> <ul style="list-style-type: none"> ▪ 110-254 ▪ 310-494 ▪ 520-524 ▪ 630, 640 ▪ 910, 913 ▪ 940, 943 ▪ 980, 983 <p>The process is designed to extract data from the Assignment Breakdown based on Duty Code.</p>
<p>Select Account Ranges</p>	
<p>Account Range Filter</p>	<p>The intent of the Account Ranges is to either include or exclude Assignments in the selected Employee Management Plans from having the salary calculated. This is based on the Account Number on the Payroll Information tab for state and local funds. The filter selections, chosen within this area, will work within the selection parameters chosen for the section.</p>

Options in this Area	Description of Options
Source Expense Account Ranges	Source Expense Account Ranges: Low Account: <ul style="list-style-type: none"> ▪ 10 * 530 0100 11 2000 000 0000 0000 High Account: <ul style="list-style-type: none"> ▪ 10 * 530 7999 33 3999 999 9999 9999
Level Ranges	Do not modify the Level Ranges.
Exclude Filter	Exclude Filter for Dimension Actv/Type/User: <ul style="list-style-type: none"> ▪ 13-15 The Exclusion filter excludes Business Office, Human Resources, and Public Relations activities.
Include Filter	Do not modify the Include Filter.

Table 16 - Description of options and recommended settings for EXPD-8 on the Extract Template Settings screen

Maintain Extracted Civil Rights Data

In the Maintain Extracted Data area, you can change the extract file data value totals in each category if needed (see the Best Practice box below). For example, you may need to change SECR-1 Sworn Law Enforcement Officers from No to Yes if any of your schools have sworn law enforcement officers, but those officers are not included in your selected EM Plan.

Best Practice	Instead of manually changing FTE values or counts in the Extract file, make changes to the Extract Parameters and rerun the Extract. Then you should see the expected changes. You can compare these values to the values from the SPI Browse Utility. To learn how to use the SPI Browse Utility, see "Run the SPI Browse Utility" (page 58).
Note	If you are working in a combined Finance/Student database, you are working in one Finance/Student combined CRDC file. Changes you make in the HR extracted data are automatically reflected on the Student Maintain Extracted Civil Rights Data screen (Student Management\Federal/State Reporting\FR\FO\PE\ME).

To maintain extracted Civil Rights Data:

1. Go to Human Resources\Federal/State Reporting\FR\FO\PE\ME.
2. Verify the selected School Year in the School Year box.
3. Click School in the top right of the screen to select the school you want to update. Click Select.

Note Smaller school districts may only have one LEAID number even if they have more than one school building. You may not be able to select different schools.

4. On the left side of the Maintain Extract Civil Rights Data screen, click the tab you want to update (Figure 18).
5. Do one of the following:
 - To manually change a field value, do the following:
 - a. Click Edit.
 - b. Enter a new value in any field you want to update.
 - c. Click Save.
 - To change field values to zero, do the following:
 - a. Click Edit.
 - b. Enter zero, or a new value in any field you want to update.
 - c. Click Save.
7. Repeat Steps 3 through 6 to update data for more schools.



Figure 18 - Maintain Extracted Civil Rights Data screen

Export Civil Rights Data

This process exports the necessary information for CRDC Reporting.

Note	You do not need to perform this process if you are working in a combined Finance/Student database. The final Export should always be performed from the Student side of the software.
-------------	---

To export Civil Rights Data:

1. Determine whether you need to export Civil Rights Data:
 - If you are working in a combined Finance/Student database, skip this process. Your HR extract is complete and automatically updates the Finance/Student combined CRDC file.
 - If you are not working in a combined Finance/Student database, you must complete this process. Continue to step 2 below.
2. Go to Human Resources\Federal/State Reporting\FR\FO\PE\EX.
3. Verify the school year corresponding to the Reporting year is selected in the School Year box, then click Run. Example, if CRDC Reporting year is 2017-2018, the School Year 2018 will be selected.
4. Select one of the following:
 - **Print Report Only** - allows for review of the final Maintenance file data without creating an export file.
 - **Export 'NS-Not Submitted' for any blank values** - allows for future update of any blank values if necessary.
 - **Export 'NS-Not Submitted' for all values** - would only be used if the extract file should be devoid of values. IE- looking for template only, no values.
5. Select the CRDC Sections you wish to export.

Note	Typically, for a final extract, you would select as shown in Figure 19.
-------------	---

- When the process is complete, the View/Save Locally for State Transfer screen appears. Continue to the next section, "[View/Save Locally for Federal Transfer](#)" below.

Figure 19 - Export Template

View/Save Locally for Federal Transfer

After running the Export Civil Rights Data process, you complete the View/Save Locally for Federal Transfer process. Whenever you run the Export process, a new file is created, so you might see multiple files.

Note You do not need to perform this process if you are working in a combined Finance/Student database. The final View/Save should be performed from the Student side of the software.

To view and save the Export Civil Rights Data file for federal transfer:

- Go to Human Resources\Federal/State Reporting\FR\FO\PE\VS.
- Select the Civil Rights Data file, then click View.
- Click Open, and review and save the Excel file.
- After you save the Excel file, submit the file by uploading it to the CRDC survey application.

Appendix A – Extract Tips

This section contains helpful information about the Extract.

Extract Processing Time

The time it takes to run the Extract depends on the size of your district and the number of Employee Management Plans selected in the Extract template. Test how long it takes to run the Extract at your district so you can allow enough time. For reference, a district with about 15,000 Assignments took approximately 40 minutes to extract the data.

Run a Test Extract

You may want to run a test on a small teacher/counselor Employee Management Plan and review the report, to verify that you selected the correct data elements in your template.

To run a test extract:

1. Add an Employee Management Plan and import Assignments from another plan using the selection parameters of Last Name A-AZ.
2. Review the data after you run the report.
3. After you verify that the data is correct, edit the CRDC template and select all the Employee Management Plans you want use in the actual Extract.

Note	You only see employees on the report who have specific building Assignments. Employees who work at the district level are not reported and do not appear on the report.
-------------	---

Run the SPI Browse Utility

The SPI Browse Utility can be useful to cross-check CRDC Report output (the Certificated Teacher and Counselor Calculated FTE by Building output).

To run the SPI Browse Utility:

1. Go to Human Resources\Employee Administration\EM Setup\UT\SB.
2. Use the same parameters in the SPI Browse that you used in the Extract (Breakdown Activity, Duty, and Building).
3. Sort the SPI Browse list by Building or Employee Name and select the Show both detail and total lines option.

Tip If you select Show total lines only on the SPI Browse screen, you can easily compare the Calc FTE values to the FTE totals on the Maintain Part 1 Extracted Civil Rights Data screen.

4. Click Print Sel Params to run a report of SPI Browse Selection Parameters and cross-check it to the CRDC Report parameters.
5. Verify that the SPI Browse Calc FTE matches the FTE totals in the Civil Rights Data Extraction Report created in "[Extract Civil Rights Data](#)" (page 8), or compare it with the data in the "[Maintain Extracted Civil Rights Data](#)" (page 53).

Note You will see some Calculated FTE rounding differences between the SPI Browse and the CRDC Extract.

The extract process will extract data for every person record contained in each Employee Management plan selected. If the same data for an employee is contained within multiple selected plans, the process WILL duplicate data. The result will be seen in increased salary amounts and FTE. Careful selection of EM/SN plans avoids this.

Time Off Detail Transaction Report

You can create a Time Off Detail Transaction Report to cross-check CRDC STAF-3 Teacher Absenteeism. The report totals each selected Time Off Code.

Run a Time Off Detail Transaction Report:

1. Go to Human Resources\Time Off\Detail Transaction Report.
2. Use the Select Employee/Codes Exceeding Specified Units Used parameter. Remember that the report will total by each Time Off Code in your selection parameters.
3. Click Selection is based only on hours used transactions.
4. Add Employee Selection Parameters for the Teacher Employee Type and for Sick, Vacation, and Personal Leave Used Time Off Codes.

Verify that the results in the Time Off Detail Transaction Report match the Civil Rights Data Extraction Report created in "[STAF-3 Teacher Absenteeism](#)" (page 15) on the Maintain screen.

Teacher FTE

STAF-1 and EXPD-3 looks at FTE and salary expenditures for teacher Assignments. Some teachers may have FTE on supplemental Assignments. Typically, you only count the calculated FTE on base (Duty Code suffix 0) Assignments and an employee's total calculated FTE should not be greater than 1.

If the FTE values are incorrect, review the selections in those sections of the Extract step. Also review the Employee Management Plans selected for the presence of duplicate data. Or, go to "[Maintain Extracted Civil Rights Data](#)" (page 53) and manually update teacher FTE in those sections.

Account Management Budgetary Data Mining Reports

WSIPC has created Budgetary Data Mining Reports for CRDC. These reports are available in Financial Management\Account Management\RP\DM (Figure 20). These reports (created by Report 000) have Report Names corresponding to CRDC Extract Item numbers used prior to 2018, the data logic is unchanged. These data mining reports provide required school information about personnel and non-personnel expenditures funded with federal, state, and local funds. These reports are read-only. You can clone the reports to customize them for your agency.

The reports were created based on information in the OCR instructions (*CRDC Data Tip: School Expenditures* <https://crdc.grads360.org>).

You can print the expenditure reports and then manually enter the amounts by school for the appropriate section of the Extract Template Settings screen or the Maintain Extracted Civil Rights Data screen. However, for personnel expenditures, this process will be more work than having the extract process pull the data from Assignments in Employee Management Plans.

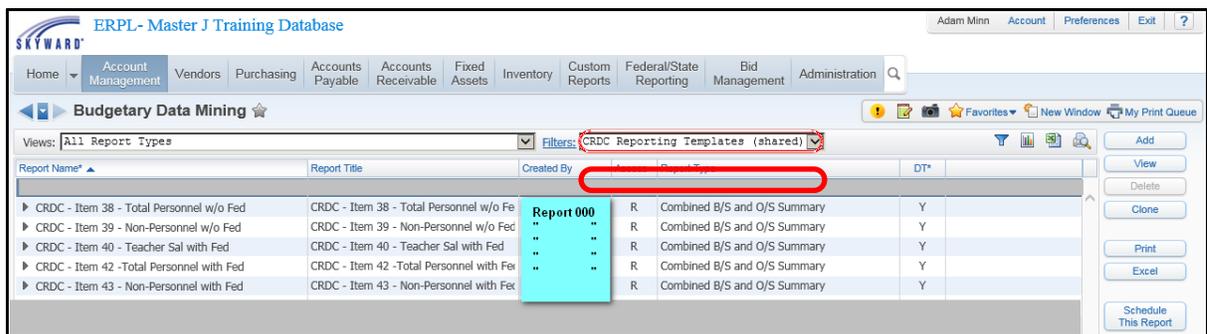


Figure 20 - Budgetary Data Mining Report Templates for CRDC

To run a Budgetary Data Mining Report:

1. Go to Financial Management\Account Management\RP\DM.
2. Type "CRDC" in the Reportable Name box in the lower part of the screen and press Enter on your keyboard.
3. Select a report.

Note Make sure you are selecting CRDC reports created by "Report 000."

Pre-2018 Title	Use for Updated Section
Item 38	EXPD-1 – Total Personnel w/o Fed
Item 39	EXPD-6* – Non-Personnel w/o Fed
Item 40	EXPD-2 – Teacher Sal w/ Fed
Item 42	EXPD-8 – Total Personnel w/ Fed
Item 43	EXPD-7* - Non-Personnel w/ Fed

*EXPD-6 and EXPD-7 will require the data mining expenditure reports in order to hand enter the data.

EXPD-1, EXPD-2, and EXPD-8 can be extracted with the use of the Extract Template, they do not require the use of data mining.

Tip Manually entering each school's EXPD values into the Extract template will allow the values to populate the Extract Report. If values are hand entered into the Maintain screen, they will not be printed on the Extract Report, and the next Extract run will replace with values present in the Extract template.

4. Click Run.
5. In the Select Month box, select any month within the Reporting Year (Figure 21).

Note The report is looking at the Fiscal Year total amount, not a monthly amount.

6. Select the Reporting Year in the Year box.
7. Select the Print Title Page check box.
8. To run the standard report, select Use current setup – no change in the Runtime Report Setup area.

Tip If you cloned a report you may need to select the Change setup for this run and save setup option in the Runtime Report Setup area and modify these reports to exclude Object Codes for sick leave buyback, vacation pay, and other types of payments that CRDC does not consider instructional, support services, or school administration activities.

Runtime Parameters

Runtime Report Parameters

Report Name: CRDC - Item 39 - Non-Personnel w/o Fed

Reporting Month: Entered Month

Select Month: August

Year: XXXX

Print Title Page

Print Greenbar

Print

Back

Runtime Report Setup

How do you want to change runtime setup?

Use current setup - no change

Change setup for this run only - do not save

Change setup for this run and save setup

Report Name: CRDC - Item 39 - Non-Personnel w/o Fed

Parameters

Breaks

Account Ranges

Field Selection

Figure 21 - Budgetary Data Mining Runtime Parameters screen

Appendix A – Extract Tips

Figure 22 shows an example of the EXPD-6 Non-Personnel w/o Fed Report. The 8,413 value for Emerald High School is what you would enter in EXPD-6 on the Extract Template.

3frbud12.p 67-4		Emerald School District		12/01/16	Page:1
p5.16.10.00.04		CRDC - Item 39 - Non-Personnel w/o Fed (Date: 9/2015)			9:02 AM
Obje	Object			2015-16	
Code	Description			FY Activity	
000	District Wide				
----				10,377	
----				1,227	
----				-----	
----				11,604	
				=====	
410	Emerald High School				
----				8,413	
----				-----	
----				8,413	
				=====	
Number of Accounts: 6					

Figure 22 - Emerald High School Non-Personnel w/o Federal expenditure example

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