

## Once you are in production in ADVANSYS:

**IMPORTANT!** Please note that the **transfer of data** from ADVANSYS to Colleague is **not** instantaneous. The regular schedule for Boomi data transfers is **from 7:00am to 8:00pm EST**, and are **run hourly**; however, during peak times the process **may take more than an hour**.

Data is moved from ADVANSYS to Colleague via **Boomi Integration**. Section information including meetings and faculty are pushed to Colleague. Student information including demographic, registration, attendance, and grades are pushed to Colleague. Student **information specific to LEIS, NRS Tests, POP, etc. are not integrated** back to Colleague.

**BSP classes are created and updated in ADVANSYS.** These classes are integrated into Colleague as sections. Any changes or updates to ADVANSYS classes will also be integrated into Colleague.

**Student records are created and updated in ADVANSYS.** The students in ADVANSYS will be integrated into Colleague. New PERSON records will be created for brand new students. If the student's record in ADVANSYS finds a matching PERSON record in Colleague, then the existing PERSON record will be used and updated.

**BSP student registration is done in ADVANSYS.** Once the student is registered in ADVANSYS, the integration process will pick up the student registration and update Colleague with the student registration.

**BSP student attendance will be marked in ADVANSYS.** Once the attendance is marked, integration process will pick up and the student attendance information (summary) will be available in Colleague (FGRN).

**BSP student grades will be set in ADVANSYS.** Once the grades are completed in ADVANSYS, the integration process will integrate this information into Colleague (FGRN).

Any updates to all the actions listed above should happen in ADVANSYS first and the integration process will integrate the relevant information to Colleague.

1. ICR reporting will be generated and submitted from Colleague
2. NRS Reporting will be done from ADVANSYS

To sum it up, the sections, student registrations, student attendance and student grades will be available in Colleague, but it is only the information needed for ICR reporting.

## Differences between Colleague & ADVANSYS

Each month, when a college ships a flat file from Colleague, it goes to **Data Warehouse (DWH)**. This information is sent as **summary data**, meaning, for example, **daily attendance for students is calculated as a total from the last time you shipped a flat file**, not day by day.

The **data** that you have **in production in ADVANSYS** comes from **Data Warehouse**. It is **not** pulled directly from Colleague; because of this, **your ADVANSYS data will never 100% match** what you had in Colleague.

## Colleague to ADVANSYS – Roadmap to Production

Like Colleague, the **program year in ADVANSYS** ends on June 30<sup>th</sup> and **data entry** for July 1<sup>st</sup> to June 30<sup>th</sup> must be completed in the system by **July 15<sup>th</sup>**. **Unlike Colleague, ADVANSYS will not** separate all students on July 15<sup>th</sup> and make you manually rollover the program year. Instead, **ADVANSYS waits until students have 90 days of inactivity and automatically separates those students by (or no later than) September 30<sup>th</sup>** due to federal reporting requirements. This means that your Table 4 data will continuously change from July 1<sup>st</sup> to October 1<sup>st</sup> because **students are continuously separating** as they reach 90 days of inactivity during this timeframe. (Throughout the rest of the program year, students are separated on the 105<sup>th</sup> day of inactivity – giving providers a cushion of 15 days to enter data for students who may not have had a full 90 days of separation. This **replaces the XLEFIX process** that we used in Colleague for false separations.)

## User Roles & New Employees

**Workflow Change- User Roles – internal auditing** of class attendance hours - In ADVANSYS, teachers are unable to pull or view attendance reports on classes they are not assigned to teach. A user role **is not and will not be available** for teachers to access attendance reports on classes they are not assigned to teach. This ensures that only teachers of record and program administrators can make changes to class attendance records. If a teacher has a non-instructional contract to provide internal auditing of classes they do not teach, providers should assign a staff member (with program level access) to pull reports for the employee to audit. Staff with the user role of "program view only" can also access class attendance reports for internal auditing purposes.

**Teacher User Roles** – Two options for adding the teacher user role to an employee –

- Teacher roles can be **selected under “new class” creation**, under the blue “Class Management” tab. You will **select the teacher’s name** from the dropdown menu and then you will select **"Teacher – student edit"** or **"teacher - no edits."** The **"teacher - no edits" option allows the person to enter attendance** on the class, but not edit any student information, section meeting days, times, etc. The “teacher -no edits” option is probably going to be the one that most providers choose in NC.
- If the teacher’s **class has already been created** in the system, you can assign either of the two teacher role options to an employee through the **“User Management”** tab. Select the user from the “User List.” Then, click the blue button, “Update User Bio” at the bottom of the page. Select a teacher role from the dropdown menu, then select a provider. From here, you will see a list of current classes. Select the class to which the teacher should be assigned and then click the blue “add” button.

**New Employees** - Add new CCR employees to ADVANSYS once HR processes them in Colleague. You no longer need to complete the Title II personnel information in Colleague (XLPE). This information is now housed in ADVANSYS only.

**User List Export** – The export file has been updated to add two new columns: Column AJ – last login and Column AK – Roles which will display the role of the user as well as their program name.

## Course Sections in ADVANSYS

**Workflow Change - Course Sections** – The ADVANSYS workflow for colleges and building class sections should be to have CCR staff build them in ADVANSYS (for colleges where sections are currently being built in departments outside of CCR.) Classes have also been updated to allow for a Secondary Location

## Colleague to ADVANSYS – Roadmap to Production

to be added to the class. Colleague's **COCO (Course Copy)** is a thing of the past. Providers can **only choose** from the class options in the dropdown list in ADVANSYS. Classes must be built within the parameters of ADVANSYS. There is no such thing as a local course anymore; just local classes (sections).

With **contact and membership classes**, you cannot earn more than the max hours for a section. Please keep this in mind with your blended and hybrid classes in ADVANSYS since the online portion is set to 24 hours. If you feel that students will exceed the max hours for the section with their online work, it is recommended to create the class as contact hour, using BSP 2000, instead of membership. The chart below shows the recommended hours and the **max hours** for each of the combined course library options in ADVANSYS. **Please use this chart** as you build sections to ensure the class is not scheduled to meet for more than the max hours for the course. **Colleague will not allow you to exceed the max hours for a course and earn FTE.**

S ID	COURSE_ID	TITLE	Start Date	Hours	Max Hours
S20033	BSP2000	Basic Skills Programs	6/17/1994	1500	1800
S14535	BSP2001	Self Supporting Basic Skills	1/20/1995	440	528
S25846	BSP3100	ABE Literacy 1	11/19/2021	96	115
S25847	BSP3150	ABE Math 1	11/19/2021	96	115
S25848	BSP3200	ABE Literacy 2	11/19/2021	96	115
S25849	BSP3250	ABE Math 2	11/19/2021	96	115
S25855	BSP3300	ABE Literacy 3	1/21/2022	96	115
S25856	BSP3350	ABE Math 3	1/21/2022	96	115
S25597	BSP3400	ABE Literacy 4	5/15/2020	90	108
S25598	BSP3450	ABE Math 4	5/15/2020	90	108
S25857	BSP3500	ASE Language Arts 5	1/21/2022	96	115
S25858	BSP3550	ASE Math 5	1/21/2022	96	115
S25859	BSP3600	ASE Language Arts 6	1/21/2022	96	115
S25864	BSP3650	ASE Math 6	1/21/2022	96	115
S25167	BSP4002	Transition English	8/17/2018	144	173
S25168	BSP4003	Transition Math	8/17/2018	144	173
S25749	BSP4010	Transition Digital Skills	3/19/2021	96	115
S25845	BSP4011	Transition Digital Skills Apps	10/15/2021	96	115
S25850	BSP5100	ESL Level 1	11/19/2021	96	115
S25851	BSP5200	ESL Level 2	11/19/2021	96	115
S25860	BSP5300	ESL Level 3	1/21/2022	96	115
S25861	BSP5400	ESL Level 4	1/21/2022	96	115
S25599	BSP5500	ESL Level 5	5/15/2020	100	120
S25600	BSP5600	ESL Level 6	5/15/2020	100	120
S25941	BSP6001	Armed Forces Career Pathways	7/15/2022	80	96

### Building a Class

Build **new class sections in ADVANSYS**. Use a unique naming convention in the **section number field in ADVANSYS** when the class is created. The naming convention needs to be unique and different for each class build. For example, you cannot use 01 each time. This is due to the use of the Combined Course

## Colleague to ADVANSYS – Roadmap to Production

Library (CCL) and if you already built a section called BSP 5500 01 and created another section called BSP 5500 01, integration would not occur on the second class build because the system thinks it has already created that course.

- In Colleague, add the department code to the section on **CRSE in Colleague** once it has integrated. Basic Skills classes use **department code CEA20**.
- Complete the **payroll pieces on the FASC** screen in Colleague for payroll purposes (if applicable) once the section has integrated from ADVANSYS.

### Prison & Jail Classes

In ADVANSYS, when creating class sections located at a prison, jail, or other correctional detention center use **“Correctional Facilities 1040”** from the dropdown menu where it asks for **“Type.”** Once integration to Colleague occurs, the class will denote a **“P” for prison on SECT**.

### GRSC (Grading Schema)

For colleges that run RISE classes through College & Career Readiness (CCR) and need the BSP-R grading schema, on GRSC, if you have not done so already, please add the P1, P2, etc. grades to Colleague using GRSC under the Basic Skills Grading Schema section. This will allow the grades to integrate from ADVANSYS to Colleague correctly and populate on FGRN, GROS and STAC.

### XPAQ (Class Override Report) *NEW!*

CCR staff will need access to **XPAQ in Colleague**. The workflow to identify overlapping class registrations involves the creation of a report that displays a list of all courses that have a conflict with time or day for students. Ensure that CCR staff have access to the **Curr/Cont.Ed. Student Overlap (XPAQ)** form to generate the *Curriculum/Continuing Education Student Overlap* report. Providers should **check this report routinely to ensure true overlaps are not occurring with students**. This report replaces the “override alert” previously used in Colleague during student registrations when a class scheduling conflict was found.

### Teacher TBD

If you are building a new class and do not yet know who the teacher(s) will be, just leave the **“primary teacher” and “assign role” fields** as they are – you will still be able to enroll students to the class; however, **attendance cannot be entered** for the section until a teacher is assigned.

### Multiple Instructors

Classes have been updated to allow for more than one teacher to be assigned to the class as well as the assignment of a role for the additional teacher. Classes may have up to 4 additional teachers to be assigned to the class during class creation or edit functionality.

When building a course, you will **select a teacher** from the dropdown list, then **assign the teacher a role**. You have **two teacher role options** in the dropdown list. One allows for the teacher to make edits in the system and the other, “teacher – no edits” allows them to only enter attendance for the class they are assigned to teach.

## Locations

If you put in a building location in ADVANSYS, when you are building a course section, you must include room # or it will not integrate to Colleague properly. When creating a **new location for a class** - create the location in Colleague and then create the location in ADVANSYS for immediate use. It is recommended to **create a spreadsheet of your buildings, room locations and room capacities** from Colleague, as applicable to CCR classes/use. The class size entered to ADVANSYS **must match the class size in Colleague** if you enter a “**max**” number of students.

## Holidays & Days When Class Will Meet

Under the attendance module go under teacher days/hours and put in 0 hours for the day when class cancelled, inclement weather, etc. You can also add a day to the class from here, too. Currently, you do not have the option to put in holidays, or days when class will not meet in ADVANSYS during the course build. This option will be a forthcoming enhancement to the system though.

## Synchronous videoconferencing hours (Zoom, Teams, etc.)

It is not 100% clear in the ADVANSYS manual how synchronous videoconferencing hours should be recorded. In a hybrid or blended section build, it pre-populates both face-to-face and proxy spots for attendance entry, but the system also gives you a 3<sup>rd</sup> option (which you’d have to add each date manually) for “add instruction-at-a-distance.”

- At this time, colleges **should not utilize** the “add instruction-at-a-distance” option.
- Please **count synchronous videoconferencing hours as face-to-face** for ease of attendance entry.

## Distance Learning Classes

Please create the courses to **collect distance learning hours daily**. ADVANSYS does provide options for collecting these hours weekly and monthly; however, in **NC distance learning hours must be recorded daily** for students. If you have software that lets you generate a report with a weekly attendance total for students then you can enter it weekly.

## Class Section Notes

“**Type**” – you can only select 1 option currently (an enhancement to allow for more than one selection is forthcoming). **If the class is a membership class, select this type!** If you need more than one type, **make the additional selections in Colleague** until the enhancement is in place.

- For example, if you have a BSP 4002 membership class running in a correctional setting, set the ADVANSYS “type” to membership-ESL and then add the “P” for prison in Colleague on the course setup screen.

Double check **all other areas** of imported class sections **imported correctly** for the **current term**. Make corrections as needed.

Do **not make corrections to old class sections** that imported and were **already closed** in Colleague. **Any change** made to an ADVANSYS section **prompts the integration process** and will cause errors back to the college on closed sections.

**RGUS in Colleague** – this is the override screen. If you select “yes” you will no longer receive error messages about class conflicts from BOOMI; however, use XPAQ report if you go this route.

## Colleague to ADVANSYS – Roadmap to Production

**Classes with Split Meeting Times** – for classes that have a break (for example, lunch hour), please **build two sections**. One for the morning session and one for the afternoon session. ADVANSYS does not allow for split times and can only write back one line to Colleague. This workflow change is in place due to software configurations/requirements between ADVANSYS, BOOMI and Colleague.

### GROS (Grade Roster)

You will **not** see student grades on GROS until you **verify the grades on FGRN**.

## BOOMI Integration Errors

The error reported in this incident is specifically on the scheduling conflicts identified when integrating ADVANSYS class with Colleague section <id> is not in this error report, please use the Instructional Space Utilization Report to generate a full list of room scheduling errors.

A sample error would look like this.

```
{"code":"InstructionalEvent.Location.RoomScheduleConflict","description":"Unable to use this room due to something else using this room during the same time.","message":"Room conflict: JPU 001 Skills for Success(Prison) 02/01/2312:30PM"}, {"code":"InstructionalEvent.Location.RoomScheduleConflict","description":"Unable to use this room due to something else using this room during the same time.","message":"Room conflict: JPU001 Skills for Success (Prison) 02/08/23-07:45AM"},
```

Below are the steps involved in using the Instructional Space Utilization Report to generate the exception report. Once the scheduling conflicts exception report is generated, please review and take actions in resolving the room scheduling errors.

### Step 1. XXIC to clear the existing work file

In the "Reporting Terms to Clear", use ... to determine which terms already exist in the work file. Clear the work file for the terms that already exist.

### Step 2. Run XXIW to build the work file for specific term(s)

In the "Reporting Terms" field use the terms for the sections that are in the Boomi error email

Leave "Course sections to exclude" as blank.

Leave "Locations to exclude" as blank.

Set "Check for sched conflicts" as Yes.

Set "Add'l Select Criteria" as Yes

In the Add'l Select Criteria page, you can specify -

WITH SEC.NAME EQ "Section Name"

## STUDENTS

### NAE (Name and Address)

There are three critical pieces of information that **the integration process does not change** on a student: **1) Student's legal name, 2) Student's date of birth, and 3) Student's Social Security Number.** This is part of the Data Governance Policy. We have made sure that we are not changing the above pieces of information in Colleague using the Boomi integration process. When any changes to these three areas is made in ADVANSYS, the staff responsible for Colleague Person information change should be involved and the legal name change must happen in the student's Colleague ID/account. Your local

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team should discuss and create a workflow that works for your college. The requirement of a second approval in ADVANSYS serves as a reminder to also change the information in Colleague.

Numbered Memo CC22-051, Standard Operating Procedure for Person Name Changes

[https://www.nccommunitycolleges.edu/sites/default/files/numbered-memos/cc22-051\\_dgc\\_name\\_change\\_policy\\_memo\\_revised\\_11012022.pdf](https://www.nccommunitycolleges.edu/sites/default/files/numbered-memos/cc22-051_dgc_name_change_policy_memo_revised_11012022.pdf)

### Searching for a Student in Colleague

**Scenario/Question Submitted:** Student records that are created in ADVANSYS do not have to capability to be searched by name in Colleague and this is primarily happening with students who have two last names. When you compare how the names appear on ADVANSYS and Colleague, they are identical. Searching by the Colleague number works fine, but the rest of our college (who do not use ADVANSYS) will not have the Colleague number unless they can find the student by name.

**Response:** Ellucian has documented this as a known issue. When a person record is created, it creates partial indexes for lookup purposes. When it comes to multi-part last names where a space exists there are specific ways to lookup the individual:

1) GonzalezGutierrez, Jose 2) Gonzalez\_Gutierrez, Jose 3) Gonzalez, Jose 4) Jose GonzalezGutierrez 5) Jose Gonzalez\_Gutierrez 6) Jose Gonzalez

### PEMR and RPMR (Person Match) *NEW!*

CCR staff will need access to **PEMR and RPMR in Colleague**. Person integration from ADVANSYS uses the Ethos API Person Matching Request to ensure duplicate person records are not created. Use the **Person Match Request (PEMR)** form to view all open person match requests and resolve any person matching requests that could not be fulfilled. The **PEMR** form displays the names of the person external to Colleague, the date and time each person match request was created, and the type of request. From each open request, access the **Resolve Person Match Request (RPMR)** form to resolve possible duplicate person records or to specify creation of a new person record. **Colleges should check PEMR routinely** and even more often during **heavy student registration** times.

### Students with 2<sup>nd</sup> & 3<sup>rd</sup> POPs

Unlike Colleague, in ADVANSYS, if a student has a 2<sup>nd</sup> or 3<sup>rd</sup> POP, the **student will need a new pretest**. Students will populate under the “Need Pre-Test” tab on the ADVANSYS dashboard. The 2023-24 NC

### Outcomes and Separations

Use the **student separation report routinely!** Students are automatically separated after 90-days of inactivity (**approved attendance or approved NRS test = activity in ADVANSYS**); however, please get into the habit of **separating students manually** when they provide a reason for separation. This will allow you to generate reports based on reasons for separation and look for trends across your students, classes, and program. **Once HSE/AHS/MPHSE/RISE students complete the program** – separate out students as they complete their diplomas, CCR RISE classes, etc. if they are no longer continuing in your Title II program. Use the outcome of “met goals.”



## Preregistration of Students & State Compliance Notes

For CCR classes, the registration date **does not** have to match the student's first date of attendance. You can preregister students to CCR sections in ADVANSYS; however, for **membership classes, please see the important notes below on registrations!**

**Registration Rosters** - Based on Numbered Memo CC10-002, Compliance Services no longer reviews for CE student signatures. All BSP classes are fee waived, and therefore, student signatures for registration into the class is not needed. Documentation of sign in/out sheets is required. *Please note that while the memo specifically lists CE, CCR typically defaults to CE as there is currently no written CCR area in State Board Code.* Colleges are **allowed to use the "transfer students" process in ADVANSYS** to move students from one section to the next; however, for membership classes see bullet below.

For CCR **membership hour classes**, colleges must ensure the student attends **prior to or on the census date and does not drop prior to or on the census date.**

- **For membership classes: You CAN preregister students, but if the student does not show up by the census date, you will need to do the following:**
  - **1 - Put in a Service Now ticket to delete the student(s) registrations from the course in ADVANSYS.**
  - **2-Once the student(s) has/have been deleted from the ADVANSYS class, the college will manually remove the student from the class using the RGN screen in Colleague, giving the student the status of X.**
- **Another scenario with membership classes: If you register a student in ADVANSYS past the census, but their attendance is on or before census, then you'll need to go to the STAC screen in Colleague and manually set the status date to reflect student's class placement date in ADVANSYS (first date of attendance in the class).**
- **Always use XCES to verify the student count and hours reported are accurate.**
- **Our long-term fix for this will be a Colleague patch but it must be created, tested, released, and installed by the colleges to automate these processes.**

CCR **membership and contact hour** classes are **required to keep time in/out documentation (to include statistical documentation for online classes) to make sure the time is calculated correctly and entered correctly on the attendance roster.**

For all **CCR classes**, the lead **instructor for each class** must **certify attendance with their physical signature and date on the ADVANSYS documentation** (until the electronic signature issue is corrected) which is the *Class Attendance Report – located under Supplemental Reports.*

**Question** - If the lead instructor **certifies (physical signature and date) the final attendance**, is it okay for someone other than the lead instructor to enter/edit attendance data for the section? For example, if a CCR staff member were to notice an error the instructor made, can they go ahead and fix it or do they need to always ask the instructor to fix it? **Compliance Team Response: If changes are made after the instructor certifies** the attendance, then the **instructor must initial** the changes.

**Question** - If staff make the edits **before attendance is certified** is that OK because the instructor will authorize it later? The ADVANSYS workflow makes it likely the edits will be made weekly upon



attendance reviews, and the instructor will sign once the course has ended and attendance is finalized.

**Compliance Team Response** - Yes, that should be fine.

## State Compliance File Contents for ADVANSYS Users

Please print a **final grade roster** (GROS) for each class and place in the state compliance file. The grade roster does **not** have to be signed.

The **Class Attendance Report** (replaces XATT or XATT2) and is printed at the end of the course, once all attendance is finalized. A signature is only required on the last page, **with the date** signed per *1G SBCCC 200.94 Reporting Hours*. **The instructor does not need to sign all pages of the final report, just the last page.**

**Sign in/out Sheets:** If the ADVANSYS electronic check in/out feature is being used, daily sign in/out sheets do not need to be printed for the final closeout file. If the ADVANSYS electronic check in/out feature is **not** being used, hard copy sign in/out sheets are required to match recorded time in ADVANSYS against the student's handwritten name and time in/out each day. Instructors then calculate this time to the quarter hour and manually enter to ADVANSYS. For asynchronous online classes supporting documentation for each student is required. *Please note, it is recommended that instructors sign the hard copy sign in/out sheets daily to meet the requirements of 1G SBCCC 200.94 Reporting Hours. While a daily signature on these sheets is not required, it is a best practice if the instructor is suddenly not available to sign the final class attendance sheet at closeout.*

**Faculty contracts** – all versions, as well as **substitute contracts**.

**Optional** – **memos and notes** about a course, if applicable.

## Student Attendance Notes

**Approved** attendance hours are the only ones that go over to Colleague. If a student needs to be removed from a class, **remove them from ADVANSYS** and **then remove** them from Colleague. If not, integration will keep putting them back in Colleague because ADVANSYS is the source record.

**Attendance approval tip** – Export your attendance that is pending approval to Excel. You can then delete columns that are not needed and sort by teacher, date, student, etc. and use the “hours entered” column to check the time entries against the sign in/out sheets to make approvals faster. Also, keep in mind that staff can edit time entries if the **teacher of record signs and dates the final class attendance report for compliance purposes**.

For **Asynchronous Classes** – a Tip from Cohort 1 – Use the **pending approvals** to review attendance. Filter by class name, export a CSV sheet, and then filter by oldest to newest. It makes it easy to compare to the reports from **Essential Ed and Apex**.

**Attendance approval tip** – Providers can access the **Monthly Attendance Report** under Supplemental Reports and filter by multiple options. From there, select a class or classes to display attendance, by class and student(s) for the selected time frame. (I personally prefer to export attendance that is pending approval into Excel and sort.)

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Another **attendance approval option/tip** - Use "**Review Hours**" under the **Class Management tab** to check the sign in sheets against the time entries to ADVANSYS **before approving** them. Personally, I had been reviewing hours through the "approvals pending" section of the system, but the "Review Hours" section seems much more efficient and can be accessed by teachers. I like that "Review Hours" also has a quick glance view of each student's hours as it relates to post-testing and MSGs for the current fiscal year.

If you need **attendance unapproved** – submit a Service Now ticket with the **student's name, ADVANSYS ID number and date(s) of attendance** that need to be unapproved in the system. Attendance can only be unlocked at the state level because **once approved, it becomes part of the state's federal reporting.**

**Important Notes on Unapproved Attendance** - When attendance is unlocked, even though only ONE student entry is being unapproved, it throws **ALL student attendance for the date back into approvals pending**, not just the one that was unapproved. This is the only way the state can unlock a student on a specific date... by unlocking everyone on that date. **Unapproving the attendance also takes it out of Colleague, and it will not go back to Colleague until it is approved again in ADVANSYS.** So, if you request to have a student's attendance unlocked on a certain date, please be sure to **reapprove all the student attendance hours for that date.**

Providers must **establish solid workflows** for approving student attendance hours in ADVANSYS. Title II compliance requires providers to **enter all data no less than weekly** and **approvals** must be completed **within a week of data entry. The un-approval process is time consuming and leads to integration and reporting errors.**

### WORKFLOW CHANGE for Student Attendance and Grading *NEW!*

**Scenario** – Providers often have students who are **separated from the system due to 90+ days** of inactivity. While this was not an issue for final grading and closeout in Colleague, a **new workflow is required with ADVANSYS** to ensure proper integration of student records to Colleague. In ADVANSYS, if a student separates due to inactivity **before** the section is closed out, the student will **no longer appear under "Enter Hours"** for final grading. The student would need to be **unseparated** by the state (submit Service Now ticket), then **re-enrolled** to the section. Grading and/or attendance **must be entered on the day** the student is unseparated, or the student **will separate again** that night.

**Response** - Providers should check the "**NRS Separation Report**" under the **Student Management tab** weekly/monthly. This **report is very important** to get into the habit of checking. Students are separated from the system on the 105<sup>th</sup> day of inactivity. Using the NRS Separation Report, follow these steps to ensure a smooth closeout of sections –

- Identify students **nearing 90 days of inactivity.**
- Look up the student in ADVANSYS.
- Enter a **future date of service**, if applicable.
- If the student does not have a future date of service, **select "change/add classes"** to identify all currently enrolled class sections.
- **Finalize the student's attendance** in all class sections.
- **Grade and separate the student** from all class sections. (Yes, you are grading these students ahead of the section ending, but please do this before the student reaches the 100<sup>th</sup> day, as it is

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a lengthy process to put a separated student back into a class where you have already graded them.)

**Another Option** – Access **Attendance Alerts** under the Student Management tab. This report can be sorted by **approved, unapproved or all attendance**. The report displays the student’s name, last attendance date, last test date, enrollment data and contact information. You can also modify the report to show the following students have not had attendance hours or tests entered for the last  or more calendar days AND are still enrolled in the class. (Use the dropdown menu to select 15, 30, 45, 60 or 90 days.) You can then click the student’s name on this report to go to their profile and see all classes currently enrolled.

### Check In/Out Feature in ADVANSYS

ADVANSYS allows for providers to use the check in/out feature for capturing student attendance. Providers can use either option (student

### Grading Students

Only grade students once **all the attendance for the class is entered, approved, and 100%** how you want it. **Print the class attendance report** for the state compliance file and make sure the **teacher of record signs and dates the final class attendance report**. If the teacher of record **does not sign the report, the college will lose ALL FTE for the course**. **Please do not forget this step**. An electronic signature for the class attendance report is forthcoming, but until then, the teacher of record **must sign the final** class attendance report. Only grade students once you are **sure** all attendance has been **entered and approved** correctly.

### To Grade Students:

- Go to “Review Hours” and check the table at the top of the report to make sure no students have already separated. If all students are still active, follow steps below. **If there are students who have separated without having received a grade**, put in a ServiceNow Ticket to have them re-activated **prior to grading**.
- Go to “Enter Hours” under the Class Management tab.
- On the class schedule page, **change the date range** on the class section to reflect the **start and end dates** of the class.
- Then, click the box for “**remove from class**” and then it allows you to type into the grade field and enter credits (if applicable).
- Click “separate.”
- Once all students have been graded/separated, please **close the class section in ADVANSYS**.

Remove From Class? <input type="checkbox"/>	Official Transcripts? <input checked="" type="checkbox"/>	Grade:	Credits:		
10/10/2022 5.50	10/11/2022 5.50	10/12/2022 5.50	10/17/2022 0.00	10/18/2022 5.50	10/19/2022 5.50

**If you forget to enter a grade on a student(s) and the class is now closed in ADVANSYS you will need to follow these steps:**

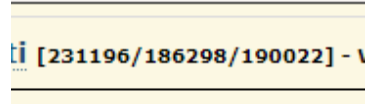
- Reopen the section under “Class List” on the Class Management tab.
- Uncheck the box for “is closed” and save the section. **This creates a duplicate section in both ADVANSYS and Colleague that has the same name, but a different Colleague ID number. To avoid this, leave the sections open in ADVANSYS until all students are active and have been graded.**
- Go to the student(s) record and select “change/add classes.”
- Re-enter the student to the class section using their original entry date to the class. (This information is shown on their record under “class placement history.”)
- Go to “Enter Hours” under the Class Management tab.
- On the class schedule page, **change the date range** on the class section to reflect the **start and end dates** of the class.
- Then, click the box for "remove from class" and then it allows you to type into the grade field and enter credits (if applicable).
- Click “separate.”
- Once all students have been graded/separated, please **close the class section in ADVANSYS.**

## Student Registrations & NRS Testing

**External Reference ID** – This is the **Colleague student ID number**, followed by your 3-digit school code.

**Last Date of Activity** – This is the last day a student had **approved** attendance or an **approved** NRS test.

**ADVANSYS Student ID Numbers** – There are three sets of numbers on a student’s record -



In this example, **231196 = Student’s Universal ADVANSYS ID (use this one on LEIS Pages)**, **186298 = Student’s Enrollment ID** (number is specific to the institution) and **190022 = Student’s NRS ID** (number could change depending on ESL or ABE/ASE testing)

**Student Separations** – Students are **automatically separated** from ADVANSYS after 105 days of inactivity unless a **future data of service** is entered for the student.

**Student Registrations & NRS Tests** - You cannot put in test scores without the NRS registration being approved by 2<sup>nd</sup> person first. This is causing a delay in entering test scores and the LEIS Page 1 and testing data come into LEIS Specialist together. What is the best workflow for this? Resolution: You can enter all the page one and page two information at the same time. You must approve the NRS registration before you approve the assessment. If you try to approve the assessment first, an error is populated saying the NRS registration must be approved first.

**Wrong class registration dates in ADVANSYS** – What is the process for deleting a student **from a class** when they were registered on a wrong date. For example, a student should have been registered to a class on 8/15, but they accidentally put 8/20. This error was realized when the teacher went to put in attendance for 8/15 and couldn't for that student. What is the process for changing the class registration

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date? Can providers do this on the local level, or do they submit a ticket? **Answer:** That can be done at the local level **so long as attendance hasn't been entered**. Just delete the class placement and then re-enter it. If they've **entered attendance**, submit a Service Now ticket and Benchmark will have to backdate the placement for the provider.

**Minor Student DMV Certification Information** - If your college is currently using the **DMV Certification section on XLSP**, once you are in production in ADVANSYS, you will need to still enter DMV information onto this **screen in Colleague**. This is **not a screen that we are migrating to ADVANSYS**, so the workflow will remain the same as it is currently.

## AHS Student Information

*This is in our current AHS manual and how Colleague is currently programmed, I have added comments in red as to how ADVANSYS works (in compliance with OCTAE) and it will hopefully help with looking at records in the system. In Colleague, we had to separate out all students each **reporting year**. This is not in accordance with OCTAE. Students should separate manually (using outcomes) or after 90 days of inactivity. Colleague could only define activity as attendance. ADVANSYS defines activity as attendance or NRS testing.*

### Initial Placement for AHS

**Colleague:** The program (AHS or non-AHS) that the student first enrolls in during the **reporting** period determines the student's initial placement. Note that the initial placement does not change for the reporting year regardless of whether the student moves to or from the AHS program during the reporting period.

- If the student's original enrollment for the reporting year is the AHS program, the student's initial placement is based on AHS Credits.
- If the student's original enrollment for the reporting period is in a CCR program other than AHS, the student's initial placement is based on NRS assessments.

**ADVANSYS does the same thing but uses the POP and not reporting year.**

**ADVANSYS: Initial Placement for AHS - If a student does not have an NRS assessment, their entering EFL will be set based on Carnegie units using the student's AHS transcript page. If the student has an NRS assessment in their POP prior to setting the entering EFL for the student using Carnegie units, the student's initial placement is based on NRS assessments.**

The percentage of completed required graduation credits threshold set by the state shall determine the placement level as either ABE Level 5 or ABE Level 6 when students enter the AHS program.

1. NC State Threshold policy:
  - a. Students entering below the 75% threshold are placed at ABE Level 5 (Adult Secondary Low - ASEL).
  - b. Students entering at or above the 75% threshold are placed at the ABE Level 6 (Adult Secondary High - ASEH).

Students initially placed as AHS will not have placement levels based upon assessments and will not be awarded pre/post-test gains for that program year. AHS students are removed from the post-testing calculations for Table 4B and the associated state performance measures.

**ADVANSYS: AHS MSG Change & Opportunity – Students in the AHS Program are not required to have placement levels based upon NRS assessments; however, AHS students can now be awarded pre/post-test gains if NRS assessments are used with AHS students. It is a local decision whether to NRS test students in the AHS program. ADVANSYS is programmed to look for an NRS pre/post gain or Carnegie unit gain when students have an AHS registration type. AHS**

**students with NRS tests will show their placement based on the NRS test; however, once the student reaches the 75% threshold through AHS credit(s) attainment, the student is awarded an MSG. Or, if the student posttests and makes an EFL gain, an MSG is awarded. Student MSG types can be viewed under the details section of the Table 4 report. The AHS Implementation Guide will be updated to reflect these changes.**

**ADVANSYS Transcripts** - As you update student classes under “transcripts” in ADVANSYS it creates a duplicate class record. **Delete the old class** record from the list using the icon with the red box with an X and allow the edited (**duplicate**) class to remain in the list. An enhancement is forthcoming to the AHS transcript process to eliminate the duplicating of class records; however, this is the current workflow as of 11.15.2022.

- Please note that the classes listed under the **AHS transcript section are not tied to** actual classes, so **modifying a class listed under the student’s transcript** section does **not** impact an actual class section. The AHS student transcript page functions independently of class sections.
  - This also means that you can **add a course credit completion date for a course**, prior to the course/semester ending. For example, if a student is enrolled in an AHS section that is scheduled from 8/16/2022 through 12/15/2022, but the student finishes the class requirements on 10/12/2022, you can add the course to the student’s transcript with a completion date of 10/12/2022.

**AHS Class Sections** – for schools that normally run **individual AHS courses** (AHS Math I, AHS ENG III, etc.), it is recommended to **now create a “parent” AHS course** going forward in ADVANSYS. In this **one course**, you would **enroll all AHS students** and place them into their subject areas in your AHS software program.

- For example, **all students enroll** into AHS-ONLINE-RIEGER (exact naming is a local decision, but **please include AHS** for ease of sorting). Students then work on their needed subject area(s) in PLATO, Odysseyware, etc. As students complete a class in the online software, add the completed class to their AHS transcript.

**Initial Placement for AHS** - If a student **does not have an NRS assessment**, their entering EFL will be set based on Carnegie units using the student’s AHS transcript page. If the student **has an NRS assessment in their POP prior to setting the entering EFL for the student** using Carnegie units, the student’s initial placement is based on NRS assessments.

**Note about entering EFL for AHS students who also have NRS tests on their record.**

- **Scenario:** There are some continuing students who have old/outdated test scores setting their Entering EFL, which does not permit us to set their AHS Entering EFL. The fact that they are continuing with outdated test scores makes it impossible for us to set their AHS Entering EFL. We also planned for some of our students to switch to the AHS Entering EFL at the beginning of the program year, but the workflow for this did/does not exist in ADVANSYS for us to change this.

**Response:** This is not possible with ADVANSYS because we should not have ended students at the end of a reporting year, like we did in Colleague. Students are placed in ADVANSYS based on continuous POPs; therefore, a new entering EFL cannot be added to a student’s record unless

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they have a new POP. (A new POP would only be created if the student stopped out and then later returned to the program.)

An AHS student can earn an MSG by credit or graduation on the same day that an entering EFL for AHS is set.

- **Scenario:** There are a few students who ended up with 2+ Adult High School program enrollment types (both with no separation). How do we fix this?

**Response:** Please submit a Service Now ticket with the student's ADVANSYS ID and we can remove the extra AHS registration.

**Question:** We are not seeing evidence of how a student can earn an MSG by credit. Will this show up under Outcomes under Approvals Pending? **Response:** This shows up on your Table 4 - run it as an Excel. Once you open the Excel sheet, click on the 3<sup>rd</sup> tab at the bottom (details) and scroll over to where you'll see columns that indicate those gains and the date earned.

**AHS MSG Change & Opportunity** – Students in the AHS Program are **not required** to have placement levels based upon NRS assessments; however, AHS students **can now be awarded** pre/post-test gains if NRS assessments are used with AHS students. It is a **local decision** whether to NRS test students in the AHS program. ADVANSYS is programmed to look for an **NRS pre/post gain or Carnegie unit gain** when students have an AHS registration type. AHS students with NRS tests will show their **placement based on the NRS test**; however, once the student reaches the 75% threshold through AHS credit(s) attainment, the student is awarded an MSG. Or, if the student posttests and makes an EFL gain, an MSG is awarded. **Student MSG types** can be viewed under the **details** section of the Table 4 report. The AHS Implementation Guide will be updated to reflect these changes.

## HSE Import Process

If you **accidentally decline** a student that should have been approved – you can **manually enter** the outcome to the student record, just **remember to also approve** the manual entry.

The **student is not in your system** yet, but the **student has HSE scores**. The system is set to constantly check for student records so once the student(s) is active in your system, you should see matches come in on the record(s).

The **writing test scores** take a couple days to come through the system on the HSE data match report. GEDTS uses a 48-hour turnaround to score and send out the writing tests.

## Reporting

*Depending on the size of your program, you may need to pull these reports more or less frequently than recommended.*

**Data Entry** – all CCR data is required to be entered **no less than weekly**. The **2<sup>nd</sup> approval** process must be completed **within a week** of data being entered to ADVANSYS (NRS registrations, Profile changes, NRS tests, attendance, outcomes). Keep in mind, **“If it is not approved, it does not exist.”**

**Power BI** – Colleges that have transitioned to ADVANSYS **will still see** their data update in Power BI for the 2022-23 program year. ADVANSYS users will **not** need to ship a flat file, the data will automatically be sent monthly from Benchmark.



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Please note that you can **schedule federal reports, custom NRS reports and supplemental reports to run on a schedule**. Providers may find this helpful!

**Every month**, providers should check for students on the “**Missing Entering EFL Report**,” located under the **Student Management** tab. Click “**include students with provisional EFL**” to see those that have an assigned EFL for the program year and need an NRS assessment as soon as possible. Once an NRS assessment is entered, it must be approved. **Upon approval**, ADVANSYS will automatically replace the provisional EFL with the approved NRS assessment.

Providers should check the **Student Enrollment Progress Report** under **Reports>Supplemental Reports** routinely. This report provides information on which students still have outstanding enrollment steps. The “**Enrollment Report**” under the **Student Management** tab also shows students who are in ADVANSYS but never placed into a class. Check this report routinely to reach out to students.

Providers should check the “**NRS Separation Report**” under the **Student Management** tab weekly/monthly. This **report is very important** to get into the habit of checking. Students are separated from the system on the 105<sup>th</sup> day of inactivity. Once a student is separated, a Service Now ticket must be submitted to un-separate the student. **Once the student is unseparated, the provider must enter attendance or an NRS test to the student record before the close of business**, or the student will separate again overnight. It is imperative that providers refine their workflows to ensure they follow **Title II’s compliance requirement of data being entered no less than weekly**.

Check the “**Testing Alerts**” under the **Student Management** tab routinely for students in need of post-testing.

Utilize the “**Low Enrollment Alerts**” under the **Class Management** tab routinely to identify contact hour classes that have space for additional students.

Check the “**HSE Data Match**” daily/weekly under the **Student Management** tab to approve any potential HSE matches.

Providers will notice that the **MSG % on the ADVANSYS dashboard vs. the MSG % on Table 4** does not match. This is because the dashboard does not consider period of participation (POP) status or attendance hours. The dashboard will include students who have not reached the 12-hour threshold, and/or have 0 hours. When a student has NO approved attendance whatsoever, even using the checkbox for “doesn’t meet minimum” on Table 4 won’t pick them up. Also, the dashboard isn’t designed to mirror Table 4 so users can compare the datasets and find students that might need attention.

When running **Table 4 in ADVANSYS**, if you select “ignore minimum attendance rule,” the report will include all students for the program year, regardless of the number of hours (0.25-11.75 hours) the student has earned (reportable + participants). It will not display students with 0 attendance hours. If you **do not** select “ignore minimum attendance rule” the report will display **only students with 12+ hours** (participants) for the program year. The Table 4 **without** “ignore minimum attendance rule” selected **is the Table 4 used for your federal funding**.

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**Reporting** – Please note that students will **not** populate on your federal reports until the 2<sup>nd</sup> approval process has been completed. Also, when pulling federal tables, please note that the reports are two pages. The first page shows criteria, date, time (Central Time) and who ran the report.

**Colleague’s Days Since Last Attended Report** – Under the Student Management tab in ADVANSYS, click “Attendance Alerts” and set the report to filter 15, 30, 45, 60 or 90 days.

**Colleague’s No Initial Placement Report** – Under the Student Management tab in ADVANSYS, click “Testing Alerts” and set the hour requirement to 0 (show all), then check the box to include students registered <30 days, and select class (optional).

### ADVANSYS Dashboards

The dashboard is configured to update every hour, on the hour, with new student (approved) data.

You can **hover over any title** on the dashboard to display more information about the tab.

The dashboards **should be used to find gaps and opportunities**. The dashboards **should not match** your federal tables.

**MSGs** - Please note that the MSG on the ADVANSYS dashboard (called “**level gain**”) includes all MSGs earned by the provider except postsecondary enrollment (PSE). These will be matched by RPM at NCCCS at the end of each program year.

The **active non-NRS** tab shows everyone with NRS registrations + additional registration types (AHS, IET, IELCE, etc.)

The **actively enrolled** tab shows students currently active in a POP (participants and reportable). These students could be at your program, **or were in your program**, but the POP did not close, and they are **now active with another Title II provider**.

**Imported Data Check - Active IET** – check that these students are correct for the current program year. Separate out incorrect students using the date of 7-1-2022.

**Imported Data Check – Active IELCE** - check that these students are correct for the current program year. Separate out incorrect students using the date of 7-1-2022.

**Imported Data Check – Active non-NRS** - check that the AHS students are correct for the current program year. Separate out incorrect students using the date of 7-1-2022.

**Imported Data Check - Needs Pre-Test** – check that these students truly need a pre-test and that there is not a gap in imported data, or tests in the 270-day lookback period that the system is not reading. Compile a list of students and submit as one Service Now ticket. In the past, we have found that there is a pattern to these data findings and there is a quick fix, once identified.