Automated Attendance Letters

Version 1.0

Overview:

Previously, the task of generating and tracking attendance letters for students was a labor intensive process for two main reasons. First, each time letters were generated, it required the user to enter specific criteria (absences types, threshold values) and the report had to be run separately for each type of attendance letter type. This method increases the risk of errors since the criteria must be re-entered many times when ideally we would like to define the letter criteria once. The second issue is that letters were not being tracked and recorded in iPass so there was no way to automatically suppress a letter for a student if that student had already received a specific letter for the year. Several enhancements were developed to address these two main issues. Together these new attendance letter features are referred to as 'Automatic Attendance Letters' (or Auto-Attendance Letters) to differentiate it from the previous attendance letter method.

What are the advantages of using the Automated Attendance Letter feature?

- All types of letters are generated together during one run of the report. No need to run the report multiple times, once for each letter type.
- No need to remember and re-enter the criteria such as absence thresholds and absence codes. The criteria for each letter is setup only *once* by an admin user at the beginning of the year.
- Flexible and Configurable- The school selects the threshold criteria and selects which attendance codes are applicable for each letter type.
- Automatically tracks which letters a student has received. You may even edit this letter history.

Can we still generate attendance letters the old way?

Yes. The old "Attendance Letters" report will remain for districts that want to continue using it. No enhancements have been made to this report. The new attendance letter report is labeled "Auto-Attendance Letters" so it is easily distinguished from the old report.

Is there any special setup required to use this attendance letter feature?

Yes, an attendance rule must be defined for each letter type that your school sends to students. But this only needs to be done one time. See the section "Steps for Configuring the Attendance Letters" below for instructions on defining these rules.

Key Points on Auto-Attendance Letters:

- The new attendance letter functionality allows a school to set up rules for when letters should be generated based on the number of absences (or tardies) a student receives. To take advantage of this functionality the school must setup an Attendance Letter Threshold definition for each attendance letter a student can receive.

- The school will indicate which attendance codes apply to each attendance letter on the Attendance Letter Threshold Rule page. The Threshold Rule page also has a "Min" and "Max" field. Only students who have a number of absences or tardies between the Min and Max will receive a letter and only if those attendance codes apply to that letter type.

- This new attendance letter functionality should make it easier for schools to process attendance letters:
  - A record will automatically be generated for each student to indicate the date of when they have received a specific letter
  - The school user does not have to run the attendance letter report multiple times with different absence criteria. Instead, the letters for a certain day can all be run at the same time and attendance letter rules will be checked to determine the criteria of which students should receive which letters.
  - The system will automatically check if a student has received a particular letter and if they are only supposed to receive that letter once, another letter would not go out to that particular student.

- The history of which letters a particular student has received is kept under **Biographical system > Add/Modify Biographical > Attendance Letters Received** tab.
  - A school user can manually edit this information to remove a record if a letter did not actually go out to a student or to add a record to indicate a letter was sent out that was not automatically generated by the system.

- Each absence code can have a value of 0.5 (half day absence), 1.0 (full day absences). These values are set in the attendance code definition page and will determine the sum total value of a set of absence codes.

- A "Reprint" option is available on the report so the letters can be generated again even after the first time they were generated.

- Besides the usual HTML output, the automatic attendance letters are available in RTF format so they can be viewed and edited in MS Word or another word processing application.

Report Name	Create Date	MSWord	RTF	HTML
autoltrattend	06/28/16 1:09pm	Not Available	autoltrattend	autoltrattend

Overview of the Attendance Letter Threshold definition screen

The Attendance Letter Rules are found under **Letter System > Create/ Modify Letters > Attendance Letter Rules**.

Each attendance letter should have one rule defined so that the system will know when to generate the letter for a student based on the tally of their attendance codes. The Threshold Definition page allows the school to indicate:

- **Letter Rule Name:** label for the rule. There could be multiple rules for the same letter type, though this is probably rare.
- **Letter Name:** which letter will generate if the criteria below are met.
- **Daily Attendance Codes:** which attendance codes apply to each letter
- **Min:** the min number of absences (or tardies) a student needs to trigger a letter to be sent.
- **Number of times a letter can be received:** (usually 1).
- **Max** field is optional. This is used to set an upper limit for absences (or tardies) when determining if a letter is to be sent. If Max = 0 then there is no max.
  - For example- You might have 2 letter types "4 Absences" and a "6 Absences" letter. If a student suddenly accrues 6 absences and has never received the "4 absences" letter the MAX field will determine if both letters should be generated or if only the "6 Absences" letter generates. If you only want the "6 Absences" letter to generate you would set MAX = 5 for the "4 absences" letter rule. Since the student's absent count is greater than 5 he would NOT receive the "4th absences" letter.
    If you want the student to receive both then you would set MAX = 0.

ATTENDANCE LETTER THRESHOLD DEFINITION

* **Letter Rule Name:** Absent Rule 1
* **Letter Name:** 1st Citation Unexcused
* **Min:** 2
Max: 3
Number of times letter can be received: 1
Active: ● Yes ○ No

☐ Delete Record?

Submit **Cancel**

DAILY ATTENDANCE CODES

	Code	Description	Excused	Absence Value
☐	HD3	Absent first half	yes	.5
☐	EDAB	Early Dismiss - Full	yes	1
☐	ED	Early Release	yes	0
☐	EDA5	Early Release - Absent - Half	yes	.5
☐	ERSP	Early Release - Sports	yes	1
☐	E	Excused Absence - Full	yes	1
☐	H	Exused Absence - Half	yes	.5
☐	FT	Field Trip	yes	1
☐	T5	Full day absent	no	1

Steps to configure the attendance Letter Rules

You must have your attendance letters defined BEFORE setting up the attendance letter rules since you will need to select the letter name on the rule screen.

1) Expand the **Letter System** folder and click **Create/Modify Letters** .

2) Click the **Attendance Letter Rules** tab.

3) If creating a new rule click **+ Add**. (If editing an existing rule, click the link of the rule's name.)

4) In the upper portion of the screen populate the following fields:
   a. **Letter Rule Name:** type a name for this rule
   b. **Letter Name:** select the name of an existing letter. This is the letter that will be generated for a student if the rule's conditions are satisfied.
   c. **Min:** Enter a number into this field. This is the minimum number of absences (or tardies) a student must have to receive the letter type selected above. The number cans decimals to account for 0.5 days of absence.
   d. **Max:** This is an optional field. If you wish to set an upper limit of absences (or tardies) for a certain letter enter a number for that limit here. For example, if you set a Max = 10 and the student has 12 absences then the student would NOT receive the letter during the next run. If Max = 0 then there is no max.
   e. **Number of times letter can be received:** If a specific letter can only be received a single time set this field to 1. You can also set this field to any integer value or set the field to 0 which indicates that there is no limit for the times a student can receive the letter.

5) Set "Active" = Yes when you wish to have the rule to be considered active and included during letter runs. Set "Active" = NO if a rule should not yet be used when generating letters.

6) The lower portion of the screen labeled "Daily Attendance Codes" will show all the absence and tardy codes defined for daily attendance in the school. Use the checkboxes to select which attendance codes are applicable to this letter type. For example, if the letter deals with unexcused absences you would select all the codes that represent unexcused absences.

7) Click **Submit** to save the rule configuration.

Steps to view and/or adjust a student's Attendance letter history

When a letter is generated for a student using the automated attendance letter report the assumption is that if a letter is generated it will be received by a student. Whenever the attendance letter report is run it will record which students received which letters along with a timestamp of when the letter was run and which user ran it.

There may be time when the attendance letter history for a specific student may need to be manually adjusted. For example, if the automated attendance letter was run but one of the students does not have a valid mailing address you may wish to REMOVE the record of that letter from the student's history to indicate that although the letter was generated it was never sent to the student. An opposite example is where a letter is created outside iPass and sent to the student. In this case you can manually CREATE a letter history record to track the date and type of letter that was sent. This will indicate to iPass that the letter should not be generated again for the student (if the letter is configured to be received only one time.)

1) Expand the 📁 **Biographical System** folder and click **Add/Modify Student Biographi** link.

2) Search for and select a student.

3) Click the **Attendance Letters Received** tab.

4) On this screen you can see the history of letters that a student has received. At this point you may want to:

   a. **Add a new record** – (example: if a letter was manually sent out, from a source that was not iPass)

      OR

   b. **Remove a record** – (example if letters were generated but it was decided NOT to send them to parents/students)

      OR

   c. **Edit a record** – (example: to add a comment to a student's letter history)

ATTENDANCE LETTERS RECEIVED

As of Date	Letter Name	User Who Ran Letter	Comment
05/19/2015	1st Citation Unexcused	dnb	
05/19/2015	Tardy Letter 2	dnb	
05/19/2015	2nd Citation Unexcused	dnb	
05/19/2015	WARNING LETTER - EXCUSED	dnb	
05/15/2015	2nd Citation Unexcused	dnb	

+ Add

Submit   **Cancel**

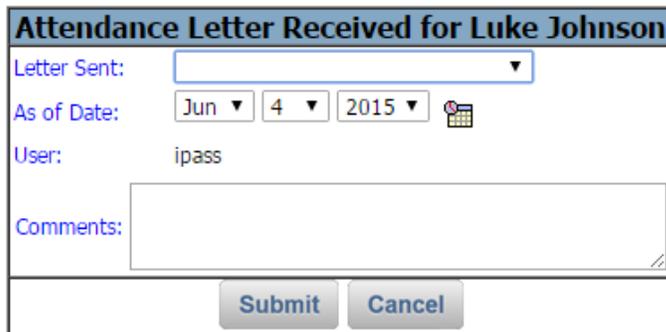5) To delete or update a record click the Letter Name of a specific row.

    a. To Delete click the "Delete Record" checkbox and click **Submit** .

    b. To enter a comment – type a comment in the comment field and click **Submit** .

Attendance Letter Received for ▮▮▮▮▮▮

Letter Sent:	1st Citation Unexcused	As of Date:	05/19/2015
User:	dnb	Date/Time of Run:	06/16/2016 09:11

Attendance Code Count at Time of Batch Run: 4.5

Comments:

☐ Delete Record?

Submit   **Cancel**

To Add a "Letter Received" record

1) Expand the **Biographical System** folder and click **Add/Modify Student Biographi** link.

2) Search for and select a student.

3) Click the **Attendance Letters Received** tab.

4) Click the **+ Add** button.

5) Select a letter type from the "Letter Sent" field.

6) Select the "As of Date".

7) Enter a Comment (optional).

8) Click **Submit**.

Steps to run Attendance letters

The automated attendance report will check all ACTIVE Attendance Letter Rules that have been configured for the school.

Please Note: It is important that only <u>one</u> person run the attendance letter batch report for a certain time period since the system will create an attendance letter history record for each student that is included in the report.

1) Expand the 📁 **Attendance System** folder and click on **Reports - Attendance** .

(An alternate path is expand the 📁 **Letter System** folder and click **Print Letters**)

2) Click the | **Auto Attendance Letters** | tab.

3) Enter the following parameters:

- **As of Date:** The system will consider all absences and tardies up to and including the date selected here. For example: if the current date is Friday Nov 5th but you want the letters based only for absences that occurred on or before Tuesday Nov 2nd you would select 11/02/20XX as the As of Date.

- **Summary Page:** select YES if you wish to see a list of students and the letters they are receiving to display before the actual letters.

- **Sort by:** select how you want the summary page and the letter output to be sorted

- **Reprint?:** This should usually be set to NO. When set to YES, all letters that are applicable for the As of Date will be generated even if the student has received the letter already. When set to NO the rule for "Number of times letter can be received" will be ignored and no "Letter Received" records will be created in a student's letter history.

ENTER SELECTION CRITERIA

<div align="center">

Submit

You may use Enter/Return or Click Submit

</div>

As of Date:	06/28/2016
Summary Page:	Yes ▾
Sort By:	Name/Letter Type ▾
Reprint? (no letter receipt):	No ▾
To:	
CC List:	
Priority:	Low ▾

<div align="center">

Submit

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