



Utah State Board of Education

USBE Year End Upload Training
May 16, 2019

A basic training covering important information and frequently asked questions for the End of Year UTREx submission. LEA staff who will be overseeing the submission (new or experienced) should attend this training. We are open to suggestions for additional training items or clarifications and additional information needed in training presentations. Please submit these to DataStatisticsHelp@schools.utah.gov or UtrexHelp@schools.utah.gov

Introduction and Announcements:

New School Definition in Board Rule [R277-100](#)

Requirements for school level reporting in Board Rule [R277-483](#)

1. Reminder that CACTUS will be taken offline for year end on June 28, 2019 at 10:00 a.m. Please let all personnel that works with CACTUS know this. Please have all CACTUS reports downloaded and saved before this date.
2. Understanding UTREx warnings and errors
3. SSIDs
4. User Removal Form and Updating the UTREx contact email list
5. Creating custom Data Gateway Roles and permissions
6. Exit codes and High School Completion Statuses
7. Average Daily Membership
8. District of Residence and Valid Address warnings – these are more of an October item, but we prefer to see these being worked on throughout the year. Please contact Kirin McInnis kirin.mcinnis@schools.utah.gov, 801-538-7674
9. Hospitalized, homebound, and institutionalized students – how to code them?
10. Membership Proration
11. Kindergarten Membership – how it is supposed to be reported (don't submit it with a .5 proration factor)
12. Part-time H and P with greater than 160 days of membership?
13. S1-X record submissions (when and how to use)
14. Historical Update requests (when and how to use)
15. Courtesy Data Review – What we'll be looking for
16. Data Submission Timeline
17. Data Finalization Process

Utah eTranscripts and Record Exchange



UTRE_x DATA COLLECTION

UTRE_x

- Understanding UTREx and SSID
- Understanding UTREx Fatal Errors
- Understanding UTREx Warnings

UTRE_x / SSID I

- UTREx and SSID databases sync data every 6 hours.
- If you make a change on any student demographic data, it needs to be updated in your SIS as well as updated on the SSID site and then you have to upload the data with the changes to UTREx which will sync with SSID within approximately 6 hours. So, there is a delay in this process.
If data doesn't match in both systems, data may be prevented from completing submissions.
- Birth Dates for SCRAM students is validated from the SSID database for funding. SSID matches on UTREx are also validated against the SSID database.
- Enrollments on UTREx are validated against the SSID database.

UTRE_x / SSID 2

- The SSID Site is helpful to know details about a student's demographic and enrollment history.
- **Here is where you can check for any discrepancies with your SIS data.**

File Maintenance Upload Request File Review File Processing Review File History	Student Search and Maintenance					
Student Maintenance Student Search Retrieve Student New Student Update Student Info Student History Merged Student Search	<i>The SSID# OR LEA Student# OR Partial Last Name OR Partial First Name OR Birthdate/Gender is Required. (Only active students are displayed.)</i>					
User Maintenance Edit User Info Change Password	Last Name	<input type="text"/>	First Name	<input type="text"/>	Middle Name	<input type="text"/>
Support		<input type="radio"/> Equal <input type="radio"/> Like <input checked="" type="radio"/> Contains		<input type="radio"/> Equal <input checked="" type="radio"/> Like		
	Gender	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	Birthdate (mm/dd/yyyy)	<input type="text"/>	SSID	<input type="text"/>
			<input type="checkbox"/> Include Similar Birthdates			
	School Year	<input type="text" value="2019"/>	LEA	<input type="text" value="99"/>	School	<input type="text"/>
					LEA Student #	<input type="text"/>
	<input checked="" type="checkbox"/> Use Soundex in search					
	<input type="button" value="Search"/>	<input type="button" value="Reset"/>	<input type="button" value="Retrieve"/>	<input type="button" value="Update"/>	<input type="button" value="Student History"/>	Matches <input type="text" value="0"/>

UTRE_x / SSID 3

- Select **Student Search** – enter SSID or student legal name –
After locating student - Select **'History'**

File Maintenance
[Upload Request File](#)
[Review File Processing](#)
[Review File History](#)

Student Maintenance
[Student Search](#)
[Retrieve Student](#)
[New Student](#)
[Update Student Info](#)
[Student History](#)
[Merged Student Search](#)

User Maintenance
[Edit User Info](#)
[Change Password](#)

Support

Student Search and Maintenance

*The SSID# OR LEA Student# OR Partial Last Name OR Partial First Name OR Birthdate/Gender is Required.
(Only active students are displayed.)*

Last Name First Name Middle Name

Equal Like Contains Equal Like

Gender Male Female Other Birthdate (mm/dd/yyyy) SSID

Include Similar Birthdates

2019 LEA 99 School LEA Student #

in search

Matches

[History](#)

UTREx / SSID 4

- SSID information can help you fix your errors in UTREx. SSID data is where UTREx validates student information.

File Maintenance Upload Request File Review File Processing Review File History	Student Search and Maintenance				
Student Maintenance Student Search Retrieve Student New Student Update Student Info Student History Merged Student Search	<i>The SSID# OR LEA Student# OR Partial Last Name OR Partial First Name OR Birthdate/Gender is Required. (Only active students are displayed.)</i>				
User Maintenance Edit User Info Change Password	Last Name <input type="text"/>	First Name <input type="text"/>	Middle Name <input type="text"/>		
Support	<input type="radio"/> Equal <input type="radio"/> Like <input checked="" type="radio"/> Contains		<input type="radio"/> Equal <input checked="" type="radio"/> Like		
	Gender <input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other	Birthdate (mm/dd/yyyy) <input type="text"/>	SSID <input type="text"/>		
	School Year <input type="text" value="2019"/> LEA <input type="text" value="99"/>	<input type="checkbox"/> Include Similar Birthdates	School <input type="text"/>	LEA Student # <input type="text"/>	
	<input checked="" type="checkbox"/> Use Soundex in search				Matches <input type="text" value="0"/>
	<input type="button" value="Search"/>	<input type="button" value="Reset"/>	<input type="button" value="Retrieve"/>	<input type="button" value="Update"/>	<input type="button" value="Student History"/>

UTRE_x ERRORS | — FIX ALL ERRORS WHEN POSSIBLE

- Level 1 FATALS and Level 1 WARNINGS are related to the LEA that is submitting the data.
- Level 2 FATALS and Level 2 WARNINGS involve other LEAs in the state. LEAs share the students and have conflicting data.

Collection		Data Collector Report Collector
Manifest	UTREx	
Manifest Version	9.11	
Collection Started	5/6/2019 7:00:39 PM	
Collection Completed	5/6/2019 9:16:59 PM	
Validate Started	5/6/2019 9:17:53 PM	
Validate Completed	5/6/2019 10:01:59 PM	
Level 1 FATALS	85 	
Level 1 WARNINGS	2669 	

Received by State		Status: Processed
Report ID	205954	
Submission		
Processing Started	5/6/2019 10:21:24 PM	
Processing Completed	5/6/2019 10:35:38 PM	
Level 2 FATALS	0 	
Level 2 WARNINGS	134 	
		View Data »

UTRE_x ERRORS 2

■ Download the Level 1 FataIs

Collection		Data Collector Report Collector
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Level 2 FataIs	0 	
Level 2 Warnings	134 	
		View Data »

UTRE_x DATA FIELDS

Pay attention to the data field titles – scroll through all data to get a complete picture of what is submitted to UTREx

	A	B	C	D
1	SeverityCode	Severity	ErrorCode	ErrorMessage
2	Fatal	79	S1.365	Days Attended > Membership - Student Record
3	Fatal	79	S1.365	Days Attended > Membership - Student Record
4	Fatal	79	S1.365	Days Attended > Membership - Student Record
5	Fatal	79	S1.365	Days Attended > Membership - Student Record
6	Fatal	79	S1.365	Days Attended > Membership - Student Record
7	Fatal	79	S1.365	Days Attended > Membership - Student Record
8	Fatal	79	S1.365	Days Attended > Membership - Student Record

ExtendedDescription

The record is invalid because the value '10' for DaysAttended is greater than the student's total membership in the school: '0' plus any S2 and S3 self-contained m

The record is invalid because the value '19' for DaysAttended is greater than the student's total membership in the school: '15' plus any S2 and S3 self-contained r

The record is invalid because the value '2' for DaysAttended is greater than the student's total membership in the school: '0' plus any S2 and S3 self-contained me

The record is invalid because the value '6' for DaysAttended is greater than the student's total membership in the school: '5' plus any S2 and S3 self-contained me

The record is invalid because the value '6' for DaysAttended is greater than the student's total membership in the school: '1' plus any S2 and S3 self-contained me

The record is invalid because the value '1' for DaysAttended is greater than the student's total membership in the school: '0' plus any S2 and S3 self-contained me

The record is invalid because the value '41' for DaysAttended is greater than the student's total membership in the school: '19' plus any S2 and S3 self-contained r

RecordID	SchoolNumber	StudentNumber	SSN	LastName	FirstName	MiddleName	BirthDate	Gender	Ethnicity
----------	--------------	---------------	-----	----------	-----------	------------	-----------	--------	-----------

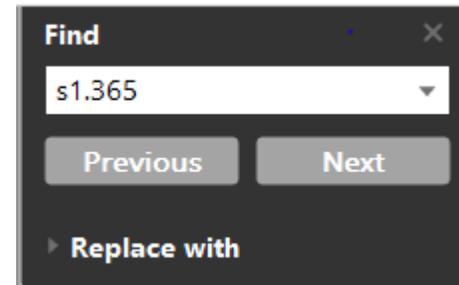
DATA CLEARINGHOUSE DOCUMENT

Use the UTREx File Specification Document for referencing errors.

UTREx

Data Clearinghouse File Specification
2018-19

Ctrl F



S1	Days Attended, School Membership (2)	Cannot be greater than total membership in the school (S1 + S2 + S3 membership)	S1.365	Err	Days Attended > Membership - Student Record	The record is invalid because the value [ColumnData] for Days Attended is greater than the student's total membership in the school: [ColumnData2] plus any S2 and S3 self-contained membership.	For PK students, assume all S2 membership is self-contained (if no time code).
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S1 - STUDENT DEMOGRAPHIC ERRORS

Submission is also referred to as Student Personal

- Fatal Error: S1.001 - Must be present – Statewide Student ID on student record
- Fatal Error: S1.102 - Must be less than or equal '899' – Mid year 'ROGL' composite score on student record – score is not in the correct score range.
- Fatal Error: S1.365 - Days Attended > Membership- Student Record
- Fatal Error: S1.366 - First enroll in U.S. > Entry Date of enrollment
- Fatal Error: S1.376 - School Membership > 0 Age < 5 Student Record – student is less than 5 years old on September 1st
- Fatal Error: S1.377 - Total Membership > 10, no 'AM' records - Student Record – student has no schedule
- Fatal Error: S1.386 - Exit Code =- 'EX' with no Incident Record

S2 - SCRAM MEMBERSHIP ERRORS

- Fatal Error: S2.603 - Age too high for disability type – SCRAM Record
- Fatal Error: S2.611 - Must be present if Exit Date not blank – SCRAM exit reason
- Fatal Error: S2.612 - Invalid combination - SCRAM exit reason – High School Completion Status
- Fatal Error: S2.617 - SCRAM membership too high – SCRAM record – total days of S1+S2
- Fatal Error: S2.621 - Invalid age 3-5 value – environment on SCRAM record
- Fatal Error: S2.622 - Invalid Age 6-21 value – Environment on SCRAM record
- Fatal Error: S2.627 - Invalid SCRAM exit date – date after school exit date

S3 – YIC - (YOUTH IN CARE) ERRORS

- Fatal Error: S3.715 - Invalid YIC Exit Date – date after school exit date
- Fatal Error: S3.702 - Student has overlapping membership records

S4 – SECTION 504 SERVICES ERRORS

- Fatal Error: S4.504 - Invalid Alleged Basis – date after school exit date
- Fatal Error: S4.505 - Invalid participation code

Section 504 Record (S4): Detailed Field Descriptions

- Record ID: (Required) The first three characters of the Section 504 record must always contain the record identifier 'S4='. Medical Impairments

AC – COURSE MASTER RECORD ERRORS

- Fatal Error: AC.803 - Must be valid LEA number in CACTUS
- Fatal Error: AC.804 - Required if Where Taught District present – Where taught school on Course
- Fatal Error: AC.810 - Must be valid code in CACTUS – core code on course master record
- Fatal Error: AC.820 - Must be present unless PK course – Teacher ID is missing

AM - COURSE MEMBERSHIP ERRORS

- Fatal Error: AM.904 - Invalid value- Course Entry Date on Course Membership -dates don't match
- Fatal Error: AM.913 - Invalid Course Exit Date on Course Membership -dates don't match
- Fatal Error: AM.916 - Student has overlapping AM records
- Fatal Error: AM.917 - Multiple AM records for elementary student - Course Membership record
 - Grade levels 00 - 05 has more than one AM record during a given time period
 - Grades 03- 006 has missing home room class and some required core classes are missing.

If the LEA uses one of the homeroom codes, students must be assigned to 1 corecode in each of the 4 areas: Language Arts, Math, Social Studies and Science or marked Part time.

SL - STUDENT LIST ERRORS W/SSID

- Fatal Error: SL.001 - Must be present – statewide student ID on Student list record
- Fatal Error: SL.501 - Must be in SSID system – statewide student ID must be unique
- Fatal Error: SL.504 - Must be in SSID system – statewide student ID on student record
- Fatal Error: SL.506 - Must be in SSID system –student birthdate match student record

I1 AND I2 - INCIDENT ERRORS 1

- Fatal Error: I2.001 - Must be present – PI Infraction Type on Incident Association Record
- Fatal Error: I2.1103 - required if Discipline Method is present – number of days on incident record – students suspended
- I2 Records are Alleged Basis fields
- Behavior Incident was caused by Alleged basis:
Gender, Race, Disability, Sexual Orientation, Religion

I1 AND I2 - INCIDENT ERRORS 2

- **SII Infraction Type: (Optional)** Indicate a secondary infraction type (or incident type) of the student in this incident. Blank is a valid option. See PI Infraction Type above for valid values.
- **SI Weapon: (Optional)** Indicate a secondary weapon used in the incident. Blank is a valid option unless SII Infraction Type is present. See PI Weapon above for valid values.
- **SII Role: (Optional)** Indicate a secondary role of the student in this incident. Cannot be present if SII Infraction or SII Weapon are blank. Must be present if SII Infraction and SII Weapon are not blank. See PI Role above for valid values.
- **SI2 Infraction Type: (Optional)** Indicate another secondary infraction type (or incident type) of the student in this incident. Blank is a valid option. Cannot be present if SII Infraction Type is blank. See PI Infraction Type above for valid values.
- **SI2 Weapon: (Optional)** Indicate another secondary weapon used in the incident. Blank is a valid option unless SI2 Infraction Type is present. See PI Weapon above for valid values.
- **SI2 Role: (Optional)** Indicate another secondary role of the student in this incident. Cannot be present if SI2 Infraction Type or SI2 Weapon is blank. Must be present if SI2 Infraction Type and SI2 Weapon are not blank. See PI Role above for valid values.
- **SI3 Infraction Type: (Optional)** Indicate another secondary infraction type (or incident type) of the student in this incident. Blank is a valid option. Cannot be present if SI2 Infraction Type is blank. See PI Infraction Type above for valid values.

ST – STUDENT TRANSCRIPT ERRORS

- Fatal Error: ST.030 - Can't be future date – Graduation dates
- Fatal Error: ST.1603 - Completion Status required if student graduated

TA – TRANSCRIPT ASSESSMENT ERRORS

- Fatal Error: TA.1501- If test name exists, must include test (ACT, SAT, AP)
- Fatal Error: TA.001 - Missing scores

TC – TRANSCRIPT COURSES ERRORS

- Fatal Error: TC.1301 - Invalid Value in Course code
- Fatal Error: TC.1303 - Must be valid CACTUS core code – compares data in CACTUS Database
- Fatal Error: TC.1305 - Credits Earned doesn't match Credits attempted

TG – TRANSCRIPT GRADES ERRORS

- Fatal Error: TG.1401 - Must match Course record ID
- Fatal Error: TG.1402 - Must be less or equal to credits attempted

UTRE_x WARNINGS - YEAR END FATAL

- Dual SCRAM will turn fatal after 20 calendar days
- The reason some fields turn fatal at year end is so data can continue to be submitted for students. Fatal errors will block students from being submitted to the different assessments during the school year for testing.
Users complain about turning warnings to fatal at year end, but users should always be correcting the warnings when possible, for all data.
- Warnings such as 'ROGL' - Reading Intervention change to fatals at year end.

UTRE_x WARNINGS - YEAR END FATALS

- SI.392 SSID in submission is possibly in use by a different student or does not match SSID system.
The SSID being submitted for this student may be in use by a different student or the submitted data does not match the data in the SSID system and may need to be updated.
- Correcting SSID numbers is critical.
- LEAs are responsible to process the SSID correctly.
- What happens to a student's SSID can reflect poorly on a student's academic history.
- LEAs are accountable for making sure student SSIDs are accurate.
- Mistakes with a student's SSID can affect a student's graduation, transcript, assessments, funding, etc.

UTRE_x - WARNINGS AND FATALS

- All Level 1 FATALS and All Level 1 Warnings – should be at zero
- All Level 2 FATALS and All Level 2 Warnings – should be at zero

Manifest	UTREx
Manifest Version	9.11
Collection Started	5/13/2019 8:04:25 PM
Collection Completed	5/13/2019 8:08:26 PM
Validate Started	5/13/2019 8:08:36 PM
Validate Completed	5/13/2019 8:16:06 PM
Level 1 FATALS	0
Level 1 Warnings	0
Examine Data	
Certified	

Report ID	206956
Submission	
Processing Started	5/13/2019 8:28:36 PM
Processing Completed	5/13/2019 8:29:27 PM
Level 2 FATALS	0
Level 2 Warnings	0

Finalized Data

UTRE_x WARNINGS - YEAR END FATAL I

Validations that begin to trigger at or near year end

School Record (SC): Errors

Record	Field	Rule	Error ID	Level	Error Message	Error Description/ Identifying Fields	Notes
SC	Multi-record	Error at Year End if total school attendance is 0 with membership > 0	SC.207w	Warn	Attendance for school is ZERO	The school attendance is zero and the school is not strictly Pre-K, YIC, or out-of-state. Highly unlikely, indicates a data error at end of school year.	Exception: school is pre-K only or has only out-of-state students (Resident Status 'C') or is dedicated YIC facility if SCHOOL_TYPE = 5 in REF_SCHOOL_LEA where SCHOOL_NUMBER = School Number.
SC	Multi-record	Warning at Year End if total school attendance is less than 50% of total school membership	SC.206w	Warn	School attendance low	The school attendance is less than one-half of the school membership. Seems unlikely, please check data.	Exception: school is pre-K only or has only out-of-state students (Resident Status 'C') or is dedicated YIC facility. YIC facility if SCHOOL_TYPE = 5 in REF_SCHOOL_LEA where SCHOOL_NUMBER = School Number.

UTREx WARNINGS - YEAR END FATAL 2

SCRAM Record (S2): Errors

Record	Field	Rule	Error ID	Level	Error Message	Error Description /Identifying Fields	Notes
S2	(Multi-record)	At Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record), if SCRAM Exit Reason = 'D' then High School Completion Status in 'S1' must be 'AO'	S2.612	Err	Invalid combination: <u>[ColumnName]</u> on <u>[TableName]</u> - High School Completion Status on Student Record	Invalid because the value <u>[ColumnData]</u> for <u>[ColumnName]</u> requires High School Completion Status 'AO' on the student's corresponding 'S1' record.	
S2	SCRAM Membership	Must be present at Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record)	S2.613	Err	Required at year end - <u>[ColumnName]</u> on <u>[TableName]</u>	Invalid because <u>[ColumnName]</u> is blank and the school year has ended.	
S2	(Multi-record)	Must be > 0 at Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record) if 'S1' Membership not 'PVT' or 'HSC'	S2.614	Err	Invalid value - <u>[ColumnName]</u> on <u>[TableName]</u>	<u>[ColumnData]</u> for <u>[ColumnName]</u> is invalid because it must be greater than zero at year end if student's 'S1' membership is not 'PVT' or 'HSC'.	

UTRE_x WARNINGS - YEAR END FATAL 3

YIC Record (S3): Errors

Record	Field	Rule	Error ID	Level	Error Message	Error Description / Identifying Fields	Notes
S3	(Multi-record)	At Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record), if YIC Exit Reason = 'D' then High School Completion Status in 'S1' must be 'AO'	S3.708	Err	Invalid combination: [ColumnName] on [TableName] - High School Completion Status on Student Record	Invalid because the value [ColumnData] for [ColumnName] requires High School Completion Status 'AO' on the student's corresponding 'S1' record.	
S3	YIC Membership	Must be present at Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record)	S3.709	Err	Required at year end - [ColumnName] on [TableName]	Invalid because [ColumnName] is blank and the school year has ended.	
Record	Field	Rule	Error ID	Level	Error Message	Error Description / Identifying Fields	Notes
S3	YIC Membership	Must be > 0 at Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record)	S3.710	Err	Invalid value - [ColumnName] on [TableName]	[ColumnData] for [ColumnName] is invalid because it must be greater than zero at year end.	

UTRE_x WARNINGS - YEAR END FATAL 4

Course Master Record (AC): Errors

Record	Field	Rule	Error ID	Level	Error Message	Error Description / Identifying Fields	Notes
AC	College Granting CR	Must be present at Year End (As <u>Of</u> Date >= Last Day of School in 'SC' record) if positions 7-8 of Core Code are '13'	AC.817	Err	Must be present for Concurrent Enrollment course - <u>[ColumnName]</u> on <u>[TableName]</u>	Positions 7-8 = '13' in Core Code indicates concurrent enrollment course.	
AC	Where Taught Campus	Must be present at Year End (As <u>Of</u> Date >= Last Day of School in 'SC' record) if positions 7-8 of Core Code are '13'	AC.818	Err	Must be present for Concurrent Enrollment course - <u>[ColumnName]</u> on <u>[TableName]</u>	Positions 7-8 = '13' in Core Code indicates concurrent enrollment course.	

UTREx WARNINGS - YEAR END FATAL 5

Course Membership Record (AM): Errors

Record	Field	Rule	Error ID	Level	Error Message	Error Description / Identifying Fields	Notes
AM	Course Exit Date	Must be present at Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record)	AM.905	Err	Required at year end - <u>[ColumnName]</u> on <u>[TableName]</u>	Invalid because <u>[ColumnName]</u> is blank and the school year has ended.	
AM	Credits Attempted	Must be present if Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record) and 'S1' Grade Level is 09, 10, 11, or 12	AM.908	Err	Must be present at year end for high school student - <u>[ColumnName]</u> on <u>[TableName]</u>	Invalid because <u>[ColumnName]</u> is <u>blank, but</u> is required for grades' 09' - '12' at year end.	
Record	Field	Rule	Error ID	Level	Error Message	Error Description / Identifying Fields	Notes
AM	Credits Earned	Must be present if Year End (SIS <u>As</u> Of Date >= Last Day of School in 'SC' record) and 'S1' Grade Level is 09, 10, 11, or 12	AM.911	Err	Must be present at year end for high school student - <u>[ColumnName]</u> on <u>[TableName]</u>	Invalid because <u>[ColumnName]</u> is <u>blank, but</u> is required for grades' 09' - '12' at year end.	

UTRE_x LEVEL 2 WARNINGS

Level 2 Exceptions

Exception Type	Error Status	Description	Tips/Guidelines for Resolving
Student School Membership	Warning	<p>Triggered when the total regular membership (s1) is greater than 180. Students transferring LEAs will be given an additional 10 days for every new LEA to which they transfer. Students transferring to or from a <u>year round</u> school may have up to 205 days. Students transferring to or from a school with a schedule approved under board rule R277-419-4(1)(b) may have up to 220 days.</p> <p>If the membership for a student is not fixed to be within the eligible number of days, at the end of the school year USBE will prorate the membership proportionate to the amount that each LEA has claimed.</p>	<p>Students are no longer allowed to receive more membership days than their eligible membership (per board rule R277-419-6). If a student is attending multiple LEAs, then the LEAs must work together to ensure that membership is claimed correctly by each LEA, and the total membership is not more than allowed for the student.</p>

UTRE^x WARNINGS I

■ **Level 1 Warnings**

- Warning: I2.001w - Seclusion on Incident Association Record is blank
- Warning: S1.318w - Grade Level too low – Student Record – Lower than grade range in CACTUS
- Warning: ST.001w - Grade 9 credits earned on student transcript

■ **Level 2 Warnings**

- New SSID - Student registered with existing SSID that differs from that in current submission
- Student School Membership - Total Membership exceeds maximum days allowed
- Student Grade Level Inconsistency - Student grade level differs by 2-3 grade levels from previous year
- Dual SCRAM warning - multiple SCRAM records in multiple schools

UTRE^x WARNINGS 2

- **District of Residence**
- This validation only triggers for Charter Schools. This validation triggers when a student's address cannot be validated and therefore used to check the district of residence field.
- Validation is made against the student's address and address is not within boundaries of the district that is being submitted.

Correcting this data is critical for funding.

UTRE_x QUESTIONS ????????????????

**You can also call 801-538-7800 or
e-mail - utrexhelp@schools.utah.gov**

HOW TO REMOVE A USER FROM UTREX & OTHER USBE SYSTEMS

USBE - USER REMOVAL FORM



END USER REMOVAL FORM PROTOCOL

USBE does not know when LEA users no longer work at your LEA. It is critical that LEAs keep this user information updated to protect student data.

- When a user leaves your LEA, having the new person use the prior employee's access to the web sites with the other employee's user name and password is **against security protocol. This is a breach of security.**
- When we hear a user say they are using John Henry's username and password to get in because they haven't had time to get their own username, that user will be locked out of the sites.
- **Please remember to safeguard student data like you would your own.**

LOCATING USER REMOVAL FORM

- <https://www.schools.utah.gov/informationtechnology?mid=3561&tid=3>
- You can also type in the search bar “User Removal” and Search

[Skip to Main Content](#)

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Utah State Board of Education

User Removal

Search



[Students and Families](#) ▾

[Community and Partners](#) ▾

[Schools and Educators](#) ▾

- **Select - Information Technology**

[Information Technology](#)

<https://www.schools.utah.gov/informationtechnology>

Welcome to Information Technology. Overview; Services; Utah State Board of Education Applications; End User Removal Form; IT Infrastructure ...

SELECT - END USER REMOVAL FORM



Keyword

Search



Students and Families ▾

Community and Partners ▾

Schools and Educators ▾

☰ INFORMATION TECHNOLOGY



Welcome to Information Technology

[Overview](#)

[Services](#)

[Utah State Board of Education Applications](#)

[End User Removal Form](#)

[IT Infrastructure](#)

End User Removal Form

This form is for the Utah State Board of Education (USBE), District and Charter School use only! It is not intended for student use. Students should contact their school directly for assistance.

CRITICAL -KEEP INFORMATION UPDATED

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End User Removal Form

This form is for the Utah State Board of Education (USBE), District and Charter School use only! It is not intended for student use. Students should contact their school directly for assistance.

User	Submitter
Name <input type="text"/>	Name <input type="text"/>
Username <input type="text"/>	Position Title <input type="text"/>
Phone Number <input type="text"/>	E-mail <input type="text"/>
E-mail Address <input type="text"/>	
LEA (District/Charter) Name <input type="text"/>	
Effective Removal Date <input type="text"/>	
Comments <input type="text"/>	

REMOVE USER FROM ALL SYSTEMS

System(s) (select all that apply)

- CACTUS
- CSCAPES
- Data Gateway
- DMI
- Move-It
- MSP
- PATI
- RIMS
- SOEP/SEATS
- SSID
- TSSP
- UCAP
- UPEFS

SUBMIT

CONTACT INFORMATION

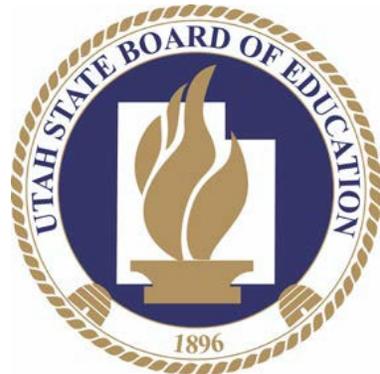
- It is important you let USBE know to update the E-mailing list USBE uses to inform LEAs of USBE information.
- Being left out of USBE notifications can be detrimental for your LEA.
- Contact the USBE Support:
 - Call - 801-538-7800
 - E-mail - UTRExhelp@schools.utah.gov



Year-End UTREx Submission Training:
Average Daily Membership (ADM)
District of Residence (DOR)

Presented by:

Utah State Board of Education
Financial Operations



Minimum School Program (slide 1)

- Minimum School Program (MSP) funding is allocated to LEAs by the USBE based on formulas provided for by statute, **Utah Code 53F-2, and State Board of Education Administrative Rules R277.**
- The legal and technical standards LEAs use to organize and maintain a student accounting system are found in two documents:
 - **The State Board of Education Rule 277-419 on Pupil Accounting**
 - **The UTREx Data Clearinghouse File Specifications**

Minimum School Program (slide 2)

- State **Minimum School Program (MSP)** funds are allocated primarily according to “prior year” plus “growth” subject to a “hold harmless” provision.
 - Prior Year refers to the average daily membership collected as aggregate membership in the prior year’s Year-End UTREx submission.
 - Growth is the percent difference between the fall enrollment derived from the October UTREx of the current year and the fall enrollment derived from the October UTREx of the prior year.
 - Hold Harmless provision means that when growth is negative prior year ADM is not reduced.

Minimum School Program (slide 3)

- The largest share of MSP funds for the Basic School MSP use allocations based on average daily membership (ADM) and fall enrollment.
- ADM is derived from total aggregate student membership data that is submitted for each student by LEAs at year-end via UTREx.
- To calculate ADM for each LEA, Financial Operations divides the final UTREx total aggregate student membership by 180.

Minimum School Program (slide 4)

- Basic MSP funding also converts **ADM** into Weighted Pupil Units (WPU)s, according to a student's grade level:
 - **DISTRICTS:** Grades 1-12 WPU are multiplied by a factor of 1.0
 - **CHARTER SCHOOLS:**
 - Grades 1-6 are weighted at 0.90
 - Grades 7-8 are weighted at 0.99
 - Grades 9-12 are weighted at 1.2
 - For **KINDERGARTEN STUDENTS:** WPU are multiplied by 0.55 (weighted) as the state only funds a half-day kindergarten program.

Membership Data In UTREx

- From the individual student detail data in the Year-End UTREx submission, the USBE generates school and LEA level summary reports.
- These reports can be found on the Data Gateway, under Year-End Reports
- During the year and prior to the final year-End submission, you can view both aggregate data and the detailed student-level data:
 - **The UTREx Consolidated Membership Cumulative Report**
 - **The School Summary Cumulative Reports**

Accessing UTREx Reports

- UTREx is accessed via USBE's Data Gateway.
- You can go directly to the site:
<https://datagateway.schools.utah.gov>
- Or select the link on USBE's home page.

UTREx shows:

- The last time your LEA submitted data
- If any errors occurred during submission
- Reports

The screenshot displays the UTREx Overview page. At the top, the Utah State Office of Education logo is visible, along with a 'Logout' link. The navigation bar includes 'DATA GATEWAY', 'My Tools', and 'UTREx'. Below the navigation bar, there are links for 'UTREx Overview', 'Students', 'Reports', 'Historical Updates', and 'Other Systems'. The main content area is titled 'UTREx Overview' and shows a status of 'Processed 4/13/2016 6:31:21 PM'. There are two main sections: 'Collection' and 'Submission'. The 'Collection' section shows details for the Data Collector and Report Collector, including Manifest, Manifest Version, Collection Started, Collection Completed, Validate Started, and Validate Completed. The 'Submission' section shows Started and Completed times. Below these, there is a 'Received by State' section with a status of 'Processed', showing Report ID, Processing Started, Processing Completed, Level 2 Fatal, and Level 2 Warning counts. A 'View Data »' link is at the bottom right.

Collection	Data Collector Report Collector
Manifest	UTREx
Manifest Version	4.31
Collection Started	4/13/2016 6:02:56 PM
Collection Completed	4/13/2016 6:07:21 PM
Validate Started	4/13/2016 6:07:26 PM
Validate Completed	4/13/2016 6:13:38 PM
Level 1 Fatal	0
Level 1 Warning	9
Examine Data	
Certified	

Submission	
Started	4/13/2016 6:15:40 PM
Completed	4/13/2016 6:15:41 PM

Received by State	Status: Processed
Report ID	84462
Processing Started	4/13/2016 6:29:01 PM
Processing Completed	4/13/2016 6:31:21 PM
Level 2 Fatal	0
Level 2 Warning	503

[View Data »](#)

UTREx Reports are used for:

- Checking Counts for accuracy
- After all data has been updated and checked, reports should be downloaded for Audits and Permanent Records

The screenshot displays the Utah State Board of Education's DATA GATEWAY interface. The header includes the Utah State Board of Education logo and navigation links for DATA GATEWAY, My Tools, and UTREx. Below the header, there are search and filter options for UTREx Overview, Students, Reports, Historical Updates, and District of Residence. The main content area is titled 'UTREx Reports / Academy for Math Engineering & Science' and is organized into three columns of report categories:

- October Reports**
 - Consolidated Membership
 - Dropout Event Summary for SPED
 - School Summary
 - Student District of Residence For Charters
 - Students Not Attending District of Residence For Districts
- December Reports**
 - Child Count by District Worksheet
 - School Summary SCRAM
 - SCRAM CCW Detail
- Year End Reports**
 - Consolidated Membership Cumulative
 - School Summary Cumulative
 - SCRAM Extended School Year
 - Transfer Student List
- Assessment Reports**
 - New Student ELP Scores
 - Reading on Grade Level
 - Reading On Grade Level with PACE
 - Reading On Grade Level with UGG
 - RISE Class List
 - Students Eligible for WIDA ACCESS
 - Utah Compose Class List
 - UTIPS Class List
- Year Round Reports**
 - Active Registration
 - Discipline Incident Summary
 - Discipline Incident Summary for SPED
 - Exited Students Current Year
 - Exited Students Previous Year
 - Grade Range Errors
 - Graduation Rate For Five Years
 - Graduation Rate For Four Years
 - Racial Survey and Detail of Enrollment
 - Student Summary
- Archived Reports**
 - Download Archived Reports »

Membership Exclusions:

- For funding purposes, certain student records will be excluded from the aggregate membership total, and some reported as separate totals on the UTREx summary reports:
 - Pre-K
 - Foreign Exchange
 - Out-Of-State
 - SCRAM/YIC Time C (Self-Contained)
 - UTREx fatal errors
 - School of Record = “No”

Consolidated Membership Cumulative Report

District	School	LocalStudentId	SSID	StudentName	Grade	Gender	EthnicityRace	EntryDate	ExitDate	SchoolOfRecord	ExitCode	YearEnd	RegularMembership	TotalAttendance	ScramMembershipA	ScramMembershipB	ScramMembershipC	YicMembershipA	YicMembershipB	YicMembershipC	HighschoolCompletion	EcoDisAdv	EnglishLearners	ResidentStatus	PartTime	Homeless	Immigrant	Migrant	Level2FatalError	Duplicate
Academy	Academy				9	M	P	8/20/2018				X	168	142		56						Y		U						N
Academy	Academy				9	F	A	8/20/2018				X	168	167								Y		U						N
Academy	Academy				9	F	B	8/20/2018				X	168	166								Y		U		X				N
Academy	Academy				9	M	W	8/20/2018				X	168	166										U						N
Academy	Academy				9	M	W	8/20/2018				X	168	152										U						N

Student-Level Data – PDF or CVS format:

Regular Membership

SCRAM Membership Time C

YIC Membership Time C

Resident Status

Level 2 Fatal Errors

School Summary Cumulative Report

Student- Level Data – CSV or Excel Format:

- Total Membership
- SCRAM Membership Time C
- YIC Membership Time C
- Resident Status

Or, school-level totals – PDF Format:



UTREx Report - School Summary Numbers in BOLD differ by 10% or more from prior year

5/8/2019 10:20:12 AM

Regular Membership for Year 2019			Prior Year	
Grade	Cumulative Count	Aggregate Days of Membership	Cumulative Count	Aggregate Days of Membership
Grade 9	135	20404	137	23620
Grade 10	135	21835	124	21798
Grade 11	119	19668	126	21990
Grade 12	118	19714	106	18556
Regular TOTAL	507	81621	493	86279

Average Daily Membership (ADM) 2019	Current Year	Prior Year
Regular ADM (UNWEIGHTED)	453	479
Regular ADM (WEIGHTED)	544	575
Self-Contained ADM	0	1

Membership for Year 2019	Cum Count	ADOM	Prior Year Cum Count	Prior Year ADOM
Youth in Custody				
Time 'A'	0	0	0	0
Time 'B'	0	0	0	0
Time 'C'	0	0	0	0
Special Education				
Time 'A' (Resource)	15	2469	12	2063
Time 'B' (Resource)	11	1702	10	1800
Time 'C' (Self-Contained)	0	0	1	180
Part Time				
Home School	0	0	0	0
Private School	0	0	0	0
Stable	0	0	0	0
Resident Status				
Non Utah resident (A)	0	0	0	0
Utah Resident but NOT LEA resident (B)	0	0	0	0
LEA resident enrolled in another State (C)	0	0	0	0
F1 Foreign Exchange - no WPU (F)	0	0	0	0
J1 Foreign Exchange - WPU (J)	0	0	0	0
Other				
Unduplicated Cumulative Count	507		496	
Students enrolled less than 160 days	36		25	

Demographics as of Oct 1, 2018 (* All counts are as of Oct 1 except Limited English and Homeless)						
Categories		Count	Prior Year Count	Categories	Count	Prior Year Count
Overall		486	482	Limited English Proficient	20	28
Ethnicity / Race	Hispanic/Latino	100	102	(* Cumulative)	Refused Service	0
	American Indian	20	17		Fluent	32
	Asian	58	67		Total	52
	African American/Black	41	35	Selected Flags	Homeless	0
	Pacific Islander	54	46		Homeless (* Cumulative)	0
	White	343	337		Migrant	0
Gender	Female	245	238	Tribal Affiliation	Goshute	0
	Male	241	244		Navajo	14
Free Lunch	Eligible for Free	0	0		Paule	0
	Eligible for Reduced Price	0	0		Northwest Band Shoshone	0
	Economic Disadvantaged	148	160		Ute	1
	"Disadvantaged" Total	148	160	Other Tribe	5	
Special Education	Time 'A'	15	11	Youth in Custody	Time 'A'	0
	Time 'B'	10	10		Time 'B'	0
	Time 'C'	0	1		Time 'C'	0
Immigrants		3	0			

Questions?

District of Residence (slide 1)

- Correct reporting is crucial for two major reasons:
 - Projection of enrollment
 - Drives legislative appropriations for public education
 - Reallocation of revenue from districts to charter schools
 - Local property tax (“Local Replacement”)

District of Residence (slide 2)

- The District of Residence (DOR) code indicates the district and address of the student's primary residence.
 - This is the students permanent home address where they live most of their time with a parent or guardian.
 - This does not necessarily mean the district within whose boundaries the charter school is located.
 - It may legitimately be a district at some distance from the charter school.

Online resources to help validate DOR/Address coding:

- **Utah Open Data Portal:** <https://opendata.utah.gov/dataset/SchoolDistricts/237f-qegx>
- **State AGRC website:** <https://gis.utah.gov/>
- **U.S. Post Office:** https://tools.usps.com/go/ZipLookupAction_input
 - For a list of common delivery designators, use this USPS document:
<http://pe.usps.com/cpim/ftp/pubs/Pub28/pub28.pdf>.
- **Google Maps:** <https://www.google.com/maps>

Other tips and tricks:

- **Street Address:** Check for typos, misspellings
- **Zip Codes:** UTREx address search tool relies mostly on zip codes, not city names.
- **Apartments:** Use a “space” between “APT” or “#” and the apartment number.
- **P.O. Boxes:** Only use for personal safety reasons; will result in a UTREx warning
- **Rural Addresses:** USPS uses contracted carriers to deliver mail, so a physical Address is not used; instead a Highway Contract address or PO Box is assigned.
- **Hill AFB:** Type “Hill AFB”, also change “Unit” to “Apt” or “#”

Help With Validations

- For the most troublesome addresses, you can email Financial Operations at the USBE.
- Financial Operations will investigate the DOR and address, and may override the UTREx warning if necessary.
- Use format below to report the exact error information to Financial Operations; this data will be found on your UTREx Level 2 error report.

Error Code	Error Name	Submitted DOR	Actual DOR	Student Address Line 1	Student Address City	Student Address State	Student Address Zip Code
14	Valid Address	04		123 Main Street	North Logan	UT	84341
13	District of Residence	05	09		Price	UT	84501

Summary Reminders

Don't wait until the end of the year to correct data....

Stay on TOP of IT!

Review Your Data Daily

Questions?

Kirin McInnis
Financial Operations
Utah State Board of Education
Kirin.McInnis@schools.Utah.gov
(801) 538-7678

MAY 16, 2019
USBE YEAR END
DATA TRAINING

Hospitalized, Homebound, Institutionalized: How to code them

Finance and Membership

- ▶ See R277-419-5 for Board rule on Hospitalized/Homebound.
- ▶ An LEA must have a continuing enrollment measurement policy in place (for attendance).
- ▶ To generate membership, 120 minutes a week with a licensed educator are needed.

Scram Record S2: Ages 3-5

► Environment: (Required) Identifies the type of educational setting in which the student receives special education and related services.

► Regardless of the grade in which the student is enrolled, students age 5 or younger must be coded as receiving services in an age 3-5 environment. Environment must be one of the following:

► *Source: UTREx Specifications 2019

Code	Meaning
C	Non-Regular program, specifically separate Special Ed class
F	Regular program, 10+ hours per week, SPED service in EC program
G	Regular program, 10+ hours per week, SPED service in other location
J	Regular program, <10 hours per week, SPED service in EC program
K	Regular program, <10 hours per week, SPED service in other location
R	Public Residential
P	Parentally Placed in Private School
S	Public Separate School
I	Neither Regular or Non-Regular program, Other location
M	Neither Regular or Non-Regular program, At Home

Scram Record S2: Ages 6-21

- ▶ **Environment: (Required)** Identifies the type of educational setting in which the student receives special education and related services.
- ▶ Regardless of the grade in which the student is enrolled, students age 6-21 must be coded as receiving services in an age 6-21 environment. The environment code must be changed to an age 6-21 environment as of the student's 6th birthday, and a regular percent must be entered for the student. Environment must be one of the following:

▶ *Source: UTREx Specifications 2019

Code	Meaning
H	Homebound/Hospitalized
R	Public Residential
S	Public Separate School
T	Private Residential Facility
U	Private Separate School
P	Parentally Placed in Private School
V	Regular School Setting
Y	Correctional Facility

Changes to SCRAM Record in 2020

- ▶ Old Rule: SCRAM Environments were strictly age-based
 - ▶ For Age 3-5 report an 'Early Childhood Environment' (C,F,G,I,J,K,M,P,R,S)
 - ▶ For Age 6-21 report a 'School Age Environment' (H,P,R,S,T,U,V,Y)
- ▶ New Rule: SCRAM Environments for 5-year old students are grade based, and all others are age-based
 - ▶ If age 3 to 5 and grade is Pre-K, or if age is less than 5 and grade is K-12, report an 'Early Childhood Environment' (C,F,G,I,J,K,M,P,R,S)
 - ▶ If age 5 to 21 in K-12 or if age 6 or older in Pre-K, report a 'School Age Environment' (H,P,R,S,T,U,V,Y)

YIC Record S3

► Environment:
(Required) Identifies the type of education setting in which the student receives youth in custody and related services.

► *Source: UTREx Specifications 2019

Code	Meaning
H	Homebound/Hospitalized
R	Public Residential Facility
T	Private Residential Facility
V	Regular School Setting

New core code

- ▶ USBE created a new core code for students called Homebound Hospital Service. This will be available starting in the 2020 school year. The code is for students that the LEA is financially responsible for, and only to be used for funding purposes. This is when an LEA provides membership, but a student is at a private institution, and the LEA needs to help pay for the educational portion of those services. The decision to place this student is at the discretion of the LEA or the courts.
- ▶ Any questions, please contact Kristin Campbell at USBE.

How to code homebound and hospitalization

- ▶ Homebound/Hospital Service: 25-01-00-00-015
 - ▶ Non-credit course for LEAs to keep track of students receiving services in private (typically hospital/secured) institutions (student only) which the LEA is financially responsible for. This is a student only code. Educators can not be assigned to this code.
- ▶ Teacher of Homebound/Hospitalized: 24-04-00-00-090
 - ▶ This code already exists. It is for educators who visit homebound and hospitalized students. The students who are visited by the educator will be assigned courses that align to the instruction. For example, a student might be assigned to Earth Science with the educator of that course. The teacher of homebound and hospitalized is assigned to visit and help the student with that course.

From last October's meeting...

- ▶ Scenarios discussed:
 - ▶ Students who are transferring and the LEA will no longer be providing services.
 - ▶ Students who are receiving educational services from the LEA while they are hospitalized/homebound.
 - ▶ Students who are receiving educational services from a third party (private institution), but the LEA is financially responsible. The student is not enrolled in courses at the LEA.

Answers...

- ▶ 1. For the first situation, it's simply a matter of figuring out the correct exit code to use. Whichever exit code you go with, there need to be written documentation to support your choice of that exit code (per the agreed upon procedures audit guide). See Board Rules that cover exit codes and high school completion status codes (R277-705, and R277-419).
- ▶ 2. For the second situation, the LEA should be submitting an enrollment record for the student. Use the regular student courses for the student. A teacher should be assigned to code 24-04-00-00-090 to help the student with their regular course records. This is not teacher of record.
- ▶ 3. For the third situation, the LEA can use the new course code 25-01-00-00-015. The student will receive no credit for this course. Using this code allows an LEA to collect membership to pay for their portion of the student's expenses. This is expected to be used very rarely.

New questions

- ▶ What documentation do LEAs need to keep for homebound/hospitalized students?
 - ▶ Whatever documentation you can get from the hospital, parents, court, special ed, etc.
- ▶ Can the 120 minutes with a teacher be online?
 - ▶ Interpretation of the 120 minutes of instruction per week is up to the LEA. See Board Rule R277-419-5. Special Ed students may have other requirements.
- ▶ With the new core code, do LEAs need to include other courses (i.e. math) that the student is enrolled in?
 - ▶ No, if you use the new core code it is strictly for financial purposes and the student should only be enrolled in this non-credit course to identify the situation. If the student is enrolled in other courses, then you should not be using this code and enroll the student like normal.
- ▶ How to exit a student when institutionalized for a limited time? Should LEAs use the new code? Or use a transfer code?
 - ▶ Only use this code when the LEA decides or a court orders a student to a private institution and the LEA is still responsible for the education of the student. If the student is exited by parents, a transfer code should be used. Temporary hospitalization/institutionalization is not when this code should be used.

Membership Proration

May 2019

Year End Upload Training

Utah State Board of Education

Membership Rule

- ▶ Student membership calculations were clarified in Board Rule R277-419-6.
<https://rules.utah.gov/publicat/code/r277/r277-419.htm#/T6>
- ▶ Students are only allowed to have 180 days of regular membership per year (with some exceptions).
- ▶ Starting with the 2016-17 school year, this board rule is enforced through membership proration applied to year-end data after it is uploaded through UTREx.

Membership Rule Exceptions (slide 1)

- ▶ Board Rule R277-419 clarifies that a student is only eligible for 180 days of regular membership per year, with a few exceptions:
 - ▶ A student who has an early graduation plan and has the early graduation flag marked is eligible for more than 180 days of regular membership.
 - ▶ A student who transfers between LEAs is eligible for a total of 170 days plus 10 days for each LEA. (This allows for a bit of overlap in enrollments.)
 - ▶ A student who transfers to or from a year-round school is eligible for up to 205 days of regular membership.
 - ▶ A student who transfers to or from a school with a schedule approved exception (under R277-419-4(1)(b)) is eligible for up to 220 days of regular membership.

Membership Rule Exceptions (slide 2)

- ▶ What if a student qualifies for more than one exception:
 - ▶ The student will be given the exception that qualifies them for the highest allowable membership, in the following order:
 1. Early Grad Flag = 1 (no limit)
 2. Schedule Exception = 1 (220)
 3. LEA Count = 4 (210)
 4. Attended more than one school, with one or more being Year Round (205)
 5. LEA Count = 3 (200)
 6. LEA Count = 2 (190)
 7. No Exceptions (180)
- ▶ Exceptions are not combined to increase the allowable membership

Proration Exclusions

- ▶ The following records are excluded from regular membership funding calculations, and are therefore excluded from membership proration calculations:
 - ▶ SCRAM and YIC Time C
 - ▶ If School of Record = 'N'
 - ▶ Preschoolers
 - ▶ Private school or Home school
 - ▶ Foreign Exchange or Out-of-state

UTREx Membership Validations

- ▶ A Level 1 fatal validation S1.012 will prevent a student from having more than 180 days of membership within a single school (except students with an early grad flag)
- ▶ A Level 2 warning, Student School Membership, will indicate when a student has more than his/her eligible membership across multiple LEAs.
- ▶ You do not want to ignore either of these validations, as they will have funding implications!

How to Solve Membership Validations

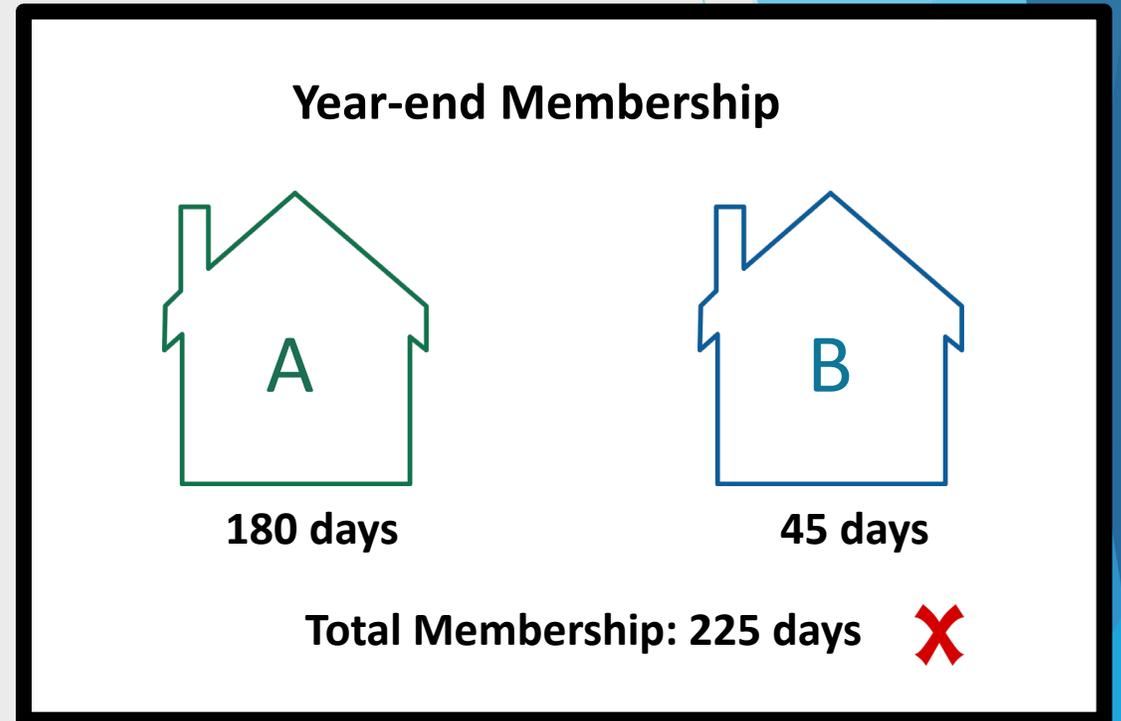
- ▶ To solve the validations:
 - ▶ Check that the student's membership has been calculated correctly. (For example, if the student is not taking a full schedule of classes, make sure the membership has been prorated correctly.)
 - ▶ Check that the student's entry and exit dates are correct.
 - ▶ If the student is attending multiple LEAs, check with the other LEA(s) to make sure all LEAs have prorated the membership correctly.

USBE Membership Proration

- ▶ USBE will prorate the membership proportionate to the amount of membership each school submitted.
- ▶ The prorated amount will not show on UTREx membership reports.

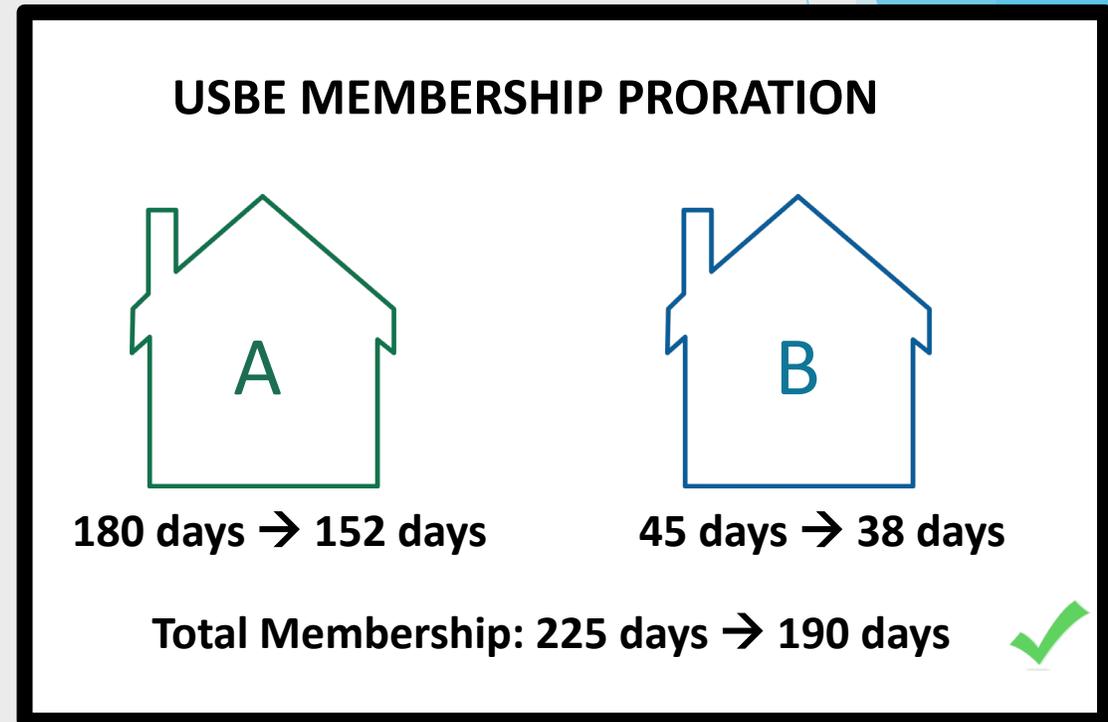
Proration Example 1

- ▶ A student took classes from two schools—6 classes at School A, plus 2 additional classes at School B.
- ▶ School A reported 180 days of membership and School B reported 45 days, for a total of 225 days. This is over the allowable membership for this student:
 - ▶ $170 + (2 \times 10)$
- ▶ Both schools should prorate the student's membership according to the total number of classes the student took:
 - ▶ School A = $6/8$, or .75 proration factor
 - ▶ School B = $2/8$, or .25 proration factor



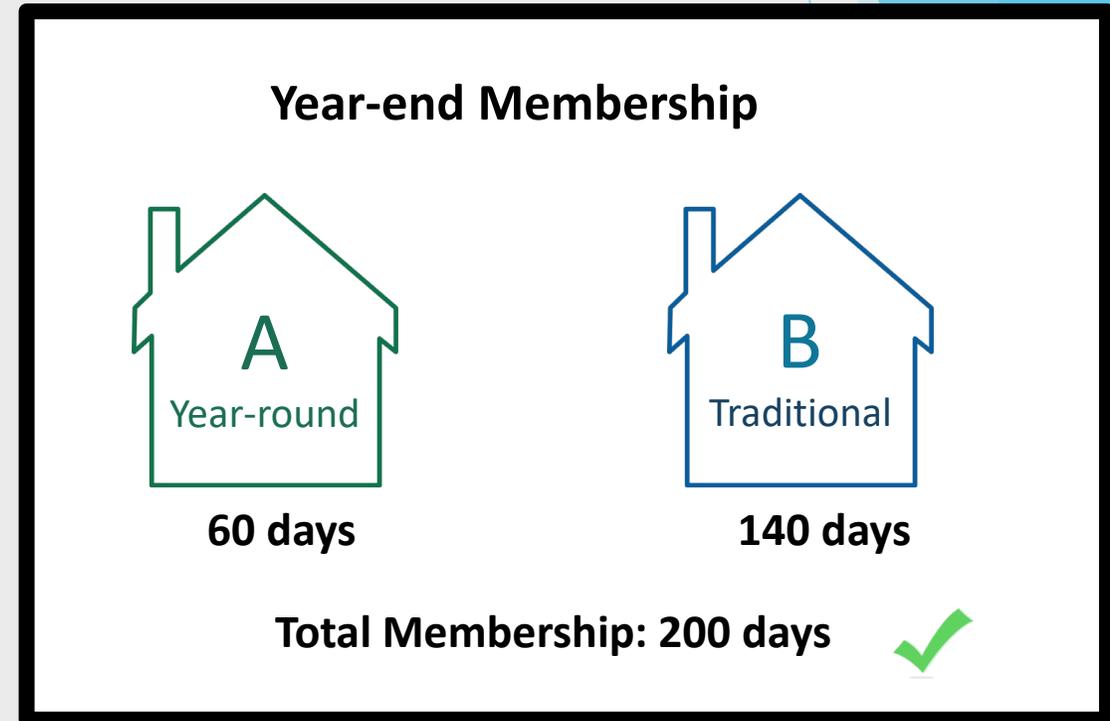
Proration Example 1 Continued

- ▶ The LEAs do not prorate their membership, so USBE will have to do so.
- ▶ USBE will prorate the membership proportionate to the amount of membership each school submitted.
- ▶ School A submitted 80% of the student's membership (180/225). School B submitted 20% of the student's membership (45/225).
 - ▶ School A is prorated down to **152 days** (80% X 190).
 - ▶ School B is prorated down to **38 days** of membership (20% X 190).



Proration Example 2

- ▶ A student started the year attending School A, a year-round school. The school year started on July 17th.
- ▶ Partway through the school year, the students transferred to school B, a school with a traditional schedule.
- ▶ School A reported 60 days of membership and School B reported 140 days, for a total of 200 days.
- ▶ This is within the allowable membership for this situation (a student who transfers to or from a year-round school is eligible for up to 205 days of regular membership).



Summary of Steps

- ▶ Student membership data is recorded by each LEA in compliance with pupil accounting rules.
- ▶ Each LEA makes corrections to UTREx validations errors before finalizing their year-end data submission.
- ▶ After all year-end data is loaded into the USBE data warehouse, membership will be prorated as necessary to bring it into compliance.
- ▶ Certain records may be excluded from the year-end total membership counts, however, funding impacts are expected for the majority of the Minimum School Programs that are based on Average Daily Membership (ADM).

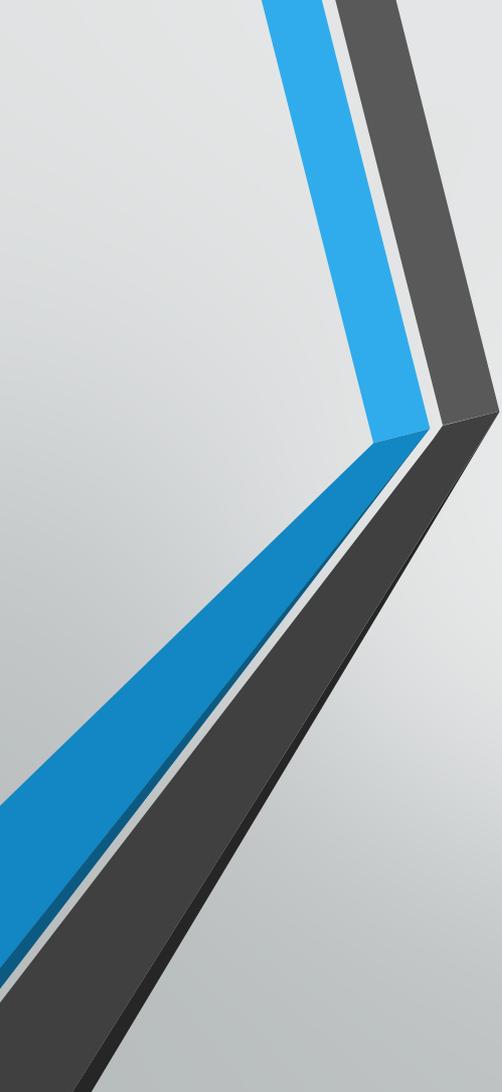


Reporting Kindergarten Membership

R277-419-2(31)

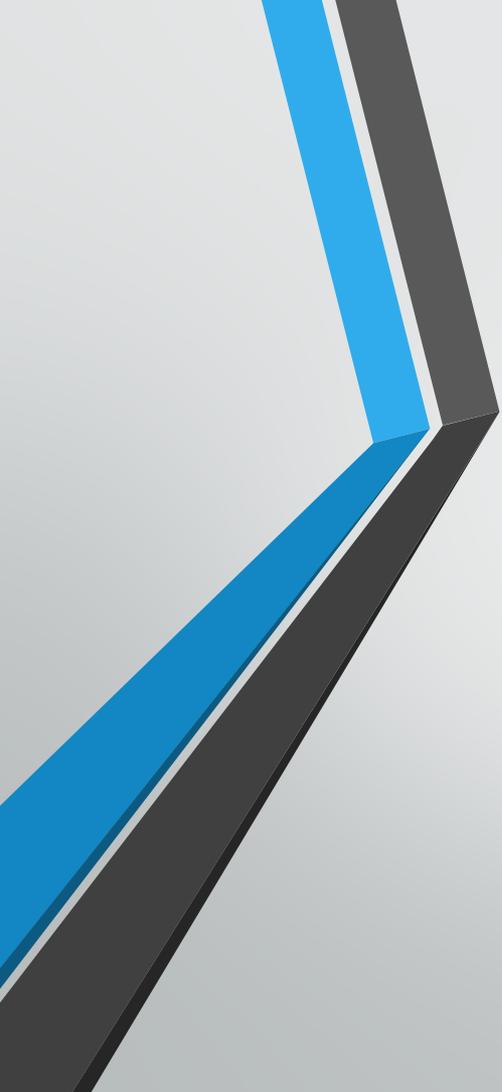
“ ‘School day’ means a minimum of two hours per day per session in kindergarten.”

“An LEA may designate no more than a total of 12 instructional days at the beginning of the school year, and at the end of the school year, or both for the assessment of students entering or completing kindergarten.”



Proration

- You do not need to apply the .55 proration membership for kindergarten students.
- You record your kindergarten students at 180 days membership.



Exception

- If a kindergarten student is enrolled for less than 450 hours, you would prorate their membership.
- Just like you would prorate a 2nd grader's membership for less than 990 hours.
- Days of Membership: $(x \text{ hours}/450) * 180$



WPU Loss for Immunization Status

There are a small number of WPUs lost each year to LEAs that don't have all immunization statuses accounted for by the time the Department of Health looks at the Mid-Year Update.



Questions?



Part Time Students

May 16, 2019

Training

How to Claim Membership

- Students that leave full time and switch to part time (codes H, P, or S)
 - Option 1:
 - Be sure to close the student's full-time enrollment record.
 - Once the record is closed, open a new enrollment that has their new enrollment status and proration factor.
 - This will ensure an accurate accounting of time spent in the LEA for funding purposes.
 - Option 2:
 - Calculate the total instruction hours provided during the school year, and apply the following calculation to determine the appropriate proration factor with which membership should be claimed (do not continue to claim full membership)
 - **Days of Membership for grades 1-12: $(x \text{ hours}/990) * 180$**
 - **Proration Factor for grades 1-12: $(x \text{ hours}/990)$**

The background features a gradient from red at the top to blue at the bottom, overlaid with faint, semi-transparent circular patterns and a scale. The scale on the left side is marked with numbers from 140 to 260 in increments of 10. Various circular elements, including solid and dashed lines with arrows, are scattered across the background, suggesting a technical or data-related theme.

S1-X RECORDS & HISTORICAL UPDATES,

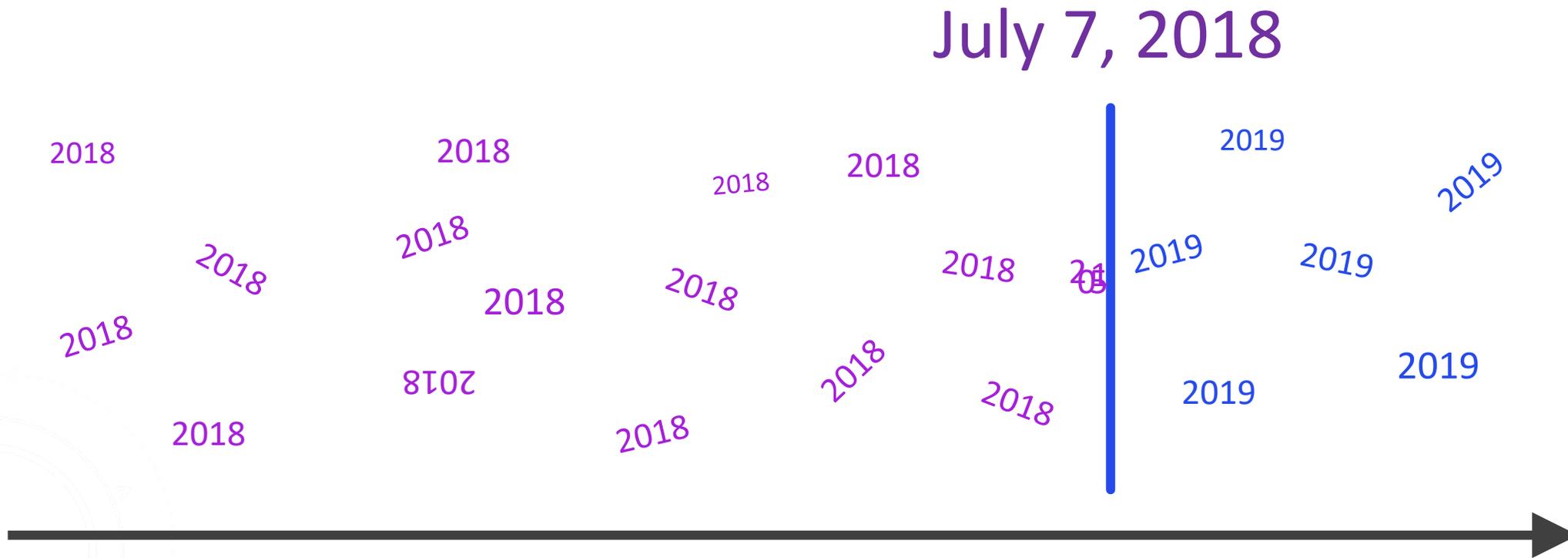
MAY 2019

YEAR END UPLOAD TRAINING

UTAH STATE BOARD OF EDUCATION

UTREx UPDATES (slide 1)

- Updates from SIS to UTREx can only be made to current year data.



UTREx UPDATES (slide 2)

- Sometimes past year data needs to be updated.
 - Grade Level Inconsistencies
 - Permanent Exit Errors
 - Graduation Updates

UTREx UPDATES (slide 3)

- Two Ways of Updating Past Year Data
 - S1-X Records
 - Historical Update Requests

UTREx S1-X UPDATES (slide 1)

- S1-X Records
 - Can update exit codes and high school completion codes
 - Are submitted through the LEA's SIS along with current year records

Record	School Year	Exit Date	Exit Code
S1	2018	1/15/2018	TS
S1-X	2019	8/15/2018	TH

UTREx S1-X UPDATES (slide 2)

- S1-X Records

- Submit an S1 record with the resident status as 'X'
- Can't be used for students who are currently enrolled

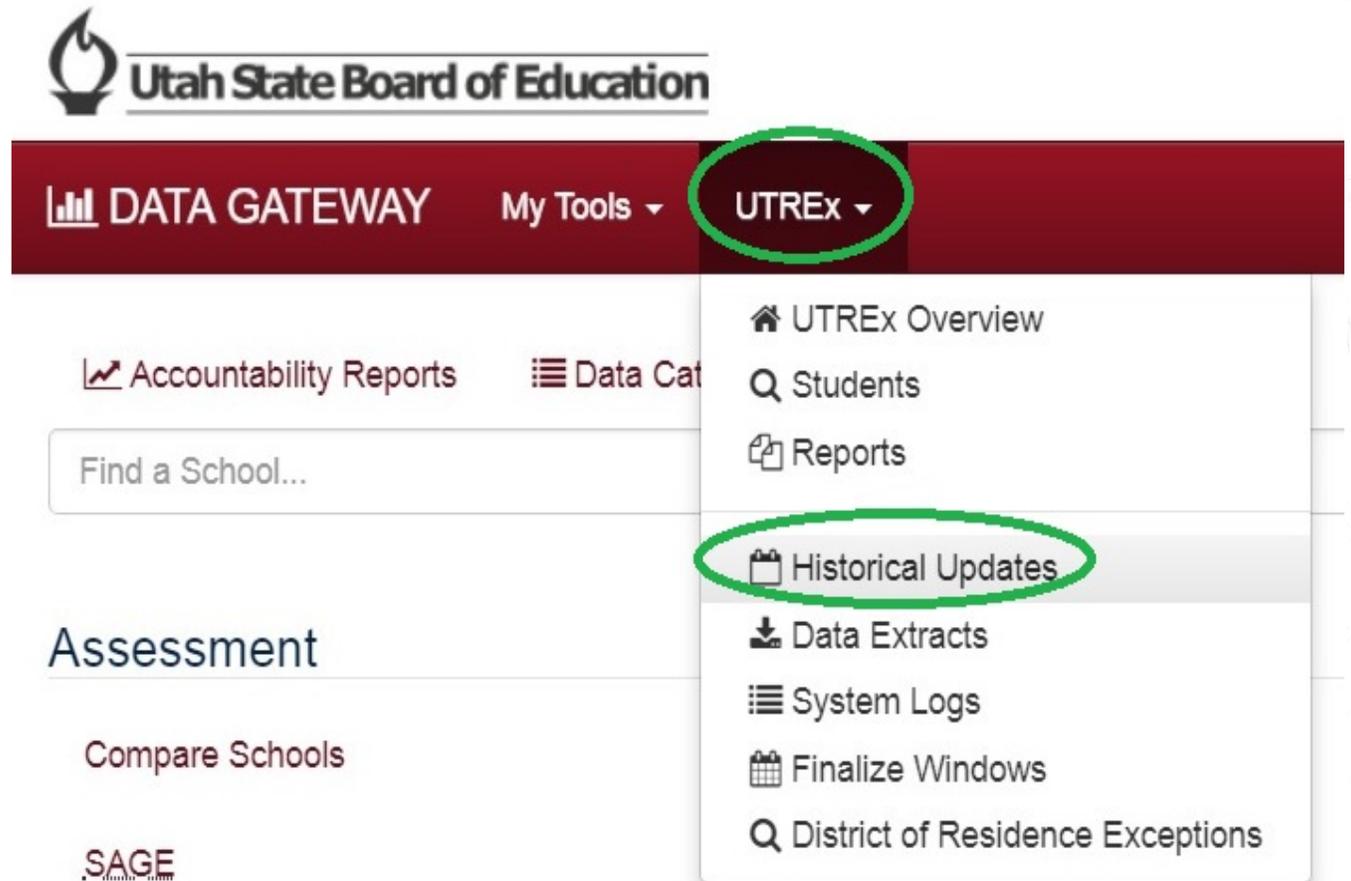
Record	School Year	Exit Date	Exit Code
S1	2018	1/15/2018	TS TH
S1-X	2019	8/15/2018	TH

HISTORICAL UPDATE REQUESTS (slide 1)

- For data that cannot be updated with an S1-X:
 - Prior year exit and high school completion code corrections for students who are enrolled during the current school year.
 - Incorrect grade level submitted in a prior year.
 - Level 2 fatal error exception requests for students whose prior year grade level is correct and is more than 2 grades lower than the current grade level.
 - Corrections to cohort years due to extenuating circumstances
 - Legal Name and Gender Changes (changed on birth certificate)

HISTORICAL UPDATE REQUESTS (slide 2)

- log into the Data Gateway, and in the UTREx pull down menu select 'Historical Updates'



The screenshot shows the Utah State Board of Education website. The header includes the logo and the text "Utah State Board of Education". Below the header is a dark red navigation bar with the following items: "DATA GATEWAY" (with a bar chart icon), "My Tools" (with a dropdown arrow), and "UTREx" (with a dropdown arrow). The "UTREx" dropdown menu is open, showing the following options: "UTREx Overview" (with a home icon), "Students" (with a magnifying glass icon), "Reports" (with a document icon), "Historical Updates" (with a calendar icon and highlighted with a green circle), "Data Extracts" (with a download icon), "System Logs" (with a list icon), "Finalize Windows" (with a calendar icon), and "District of Residence Exceptions" (with a magnifying glass icon). Below the navigation bar, there are sections for "Accountability Reports", "Data Gateway" (with a list icon), a search box labeled "Find a School...", "Assessment", "Compare Schools", and "SAGE".

HISTORICAL UPDATE REQUESTS (slide 3)

- On the Historical Update Request page select 'New Request'.



 DATA GATEWAY

My Tools ▾

UTREx ▾

Accounts



 UTREx Overview

 Students

 Reports

 Historical Updates

Other Systems ▾

 Show Closed Requests

Historical Update Requests

Request ID

Student

Requested On

Requested By

 New Request

HISTORICAL UPDATE

- Use the SSID Lookup to make sure that you have the correct SSID, and fill in the requested information.
- Fill out one request form per student. If you have a large number of updates contact UTREx Help or Data and Statistics to see if there is a better way to make the updates.

Create Historical Update Request

SSID Lookup:

Lookup a Student by SSID (4 digits required to start)...

SSID:

Student Name:

School Year to be Updated:

School and District to be Updated:

Reason:

Update Instructions:

Created By:

Created By Email:

Created By Phone:

State Notes:

Save

Cancel

HISTORICAL UPDATE REQUESTS (slide 5)

- You'll receive an email once the request has been reviewed and is approved or denied.
- If a historical update is completed you should resubmit and review your data to ensure that the change is what was expected.
- It will take time for USBE's Data and Statistics and IT staff to review, research, approve, and make the update. After the update is completed you will need time to resubmit. Thus the deadline for historical update requests is two weeks before any major deadlines.

CONTACTS

- Data and Statistics

- <https://schools.utah.gov/data/contact>
- DataStatisticsHelp@schools.utah.gov

- UTREx Help

- utrexhelp@schools.utah.gov
- 801-538-7800

YEAR END COURTESY DATA REVIEW- WHAT WE WILL BE LOOKING FOR

May 16, 2019

USBE Year End Upload Training



WHAT CHANGED

► Previously referred to as end of year 'soft audits.' We wanted to get away from the term 'audit', as it may imply a more comprehensive and authoritative review and an that the letter will give *everything* that needs to be fixed. Instead, the purpose of these letters is for USBE to *help* LEAs review their data prior to the end of year submission and find things that they otherwise might have overlooked. So, we are calling this a 'courtesy data review.' Same letter, same things included as before.



EXAMPLE OF REVIEW LETTER

Dear Business Official,

The Data and Statistics section of USBE has completed a courtesy data review of your Dec 1 submission. This review reflects the submission on November 30, and is based on a comparison of SY 2019 data with SY 2018 data. In general we check for missing data and any counts that have greatly changed from the previous school year, as these may alert us to potential data quality issues. There is no guarantee that we can catch any or all issues; data may change if additional submissions are made; data accuracy is the responsibility of LEAs.

NEW: LEAs must submit a finalized version of their Dec 1 data prior to the deadline on December 10 at 5pm. By hitting the *Finalize* button in UTREx LEAs are verifying that they have audited and confirmed the accuracy of their data. The Data Collector will be closed at 5pm sharp on the 10th.

Please **review and respond** to confirm that the below items are correct, or will be updated in a submission prior to December 10:

- No response required.

Please review the following items to verify that the submission was correct (no response necessary):

- Relatively large decrease in your K-12 Dec 1 Special Ed count (from 58 to 51, or 14%)
- Zero students reported as homeless.
- Zero students reported as eligible for alternate assessments.

Review your UTREx December Reports and Graduation and Dropout data to ensure that the data in UTREx accurately reflects the data in your local student information system. You can make corrections to and resubmit (and re-finalize) the UTREx file as often as necessary through **December 10th**. Once you are satisfied with your submission, **please finalize your data and download and save your December UTREx reports using finalized data**, including the Child Count by District Worksheet, School Summary SCRAM, and SCRAM CCW Detail report. Once you *finalize* your data submission you do not need to turn off data submissions.

WHAT WE WILL BE LOOKING FOR AT YEAR END:

- ▶ Fatal Errors
 - ▶ Warnings that could go fatal
 - ▶ Warnings in general
 - ▶ Enrollment and Membership
 - ▶ Demographic Counts
 - ▶ ROGL Statuses
 - ▶ Reading Interventions
 - ▶ Kindergarten Type
 - ▶ Incident Data
 - ▶ SCRAM ESY
 - ▶ High counts of students with less than 160 days of membership
 - ▶ Early Grads
 - ▶ Reported credits attempted, credits earned, and course grades
- 
- A decorative graphic consisting of several parallel, diagonal cyan lines of varying lengths, located in the bottom right corner of the slide.

FATAL ERRORS

- ▶ Fatal errors block records or parts of records from coming through to UTREx.
 - ▶ This affects funding.
 - ▶ Level 1 fatal errors are from the LEA's own data.
 - ▶ Level 2 fatal errors are from the data once it is in UTREx- could be errors across years or LEAs.
 - ▶ Fatal errors result when a required field is blank, or has an incorrect value.
 - ▶ You can still finalize your data with a fatal error, but you may lose funding.
 - ▶ Fatal errors may also negatively affect the quality of data, and the accuracy of student records.
 - ▶ You can review your fatal errors in the UTREx Overview.
- 

WARNINGS THAT COULD GO FATAL...

- ▶ Some validations start triggering on the last day of school (a list is included at the end of this Powerpoint).
 - ▶ Level 2 exceptions in UTREx specs:
 - ▶ Dual SCRAM warning and dual SCRAM fatal- it's only a warning until there's been 19 days overlap, at 20 days it becomes a fatal error.
 - ▶ Another example is SCRAM environment codes that have to be changed on a student's 6th birthday- it's a warning until the student turns 6.
 - ▶ You can review your warnings and fatal errors in the UTREx Overview.
- 
- A decorative graphic consisting of several parallel, diagonal cyan lines of varying lengths, located in the bottom right corner of the slide.

WARNINGS IN GENERAL...

- ▶ **All warnings should be reviewed!**
- ▶ Warnings are triggered by things that *might* be wrong and you should check.
- ▶ After verifying the accuracy of the data, if the data is correct and you keep getting the warning, you'll just have to ignore it.
 - ▶ Examples: 9th grade student with no GPA during the Oct 1 upload, so their first term hasn't come to an end yet.
 - ▶ Grade level inconsistency for a student who has skipped a grade level.
- ▶ Possible warnings and errors are listed in the UTREx specs, which you can download from the USBE website:
<https://www.schools.utah.gov/informationtechnology/utrex>
- ▶ You can review your warnings in the UTREx Overview.

ENROLLMENT AND MEMBERSHIP

- ▶ Double check ADM, cumulative enrollment, and enrollment and membership by grade level.
 - ▶ Also check enrollment and membership by SCRAM, YIC, part-time, and resident status.
 - ▶ We look for big, unexpected changes as compared with the previous year.
 - ▶ You can review this data in the '*School Summary Cumulative*' report in UTREx Reports under *Year End Reports* (download the PDF to review aggregates, or see the student data behind the aggregates by downloading the CSV or Excel file).
 - ▶ UTREx Overview → Reports → School Summary Cumulative.
 - ▶
- 
- A decorative graphic consisting of several parallel teal lines of varying lengths and orientations, located in the bottom right corner of the slide.

Regular Membership for Year 2018			Prior Year	
Grade	Cumulative Count	Aggregate Days of Membership	Cumulative Count	Aggregate Days of Membership
Kindergarten	71	10577	83	12845
Grade 1	80	12669	72	11414
Grade 2	74	11249	81	13329
Grade 3	87	13328	80	12873
Grade 4	73	11340	76	12017
Grade 5	84	13338	78	12446
Grade 6	75	11668	96	16036
Regular TOTAL	544	84169	566	90960
Average Daily Membership (ADM) 2018			Current Year	Prior Year
Regular ADM (UNWEIGHTED)			468	505
Regular ADM (WEIGHTED)			441	473
Self-Contained ADM			24	27

Membership for Year 2018	Cum Count	ADOM	Prior Year Cum Count	Prior Year ADOM
Youth In Custody				
Time 'A'	3	448	6	697
Time 'B'	0	0	0	0
Time 'C'	0	0	0	0
Special Education				
Time 'A' (Resource)	62	6742	59	7138
Time 'B' (Resource)	43	5196	34	4533
Time 'C' (Self-Contained)	31	4262	33	4825
Part Time				
Home School	0	0	0	0
Private School	0	0	0	0
Stable	0	0	0	0
Resident Status				
Non Utah resident (A)	0	0	0	0
Utah Resident but NOT LEA resident (B)	7	918	12	1626
LEA resident enrolled in another State (C)	0	0	0	0
F1 Foreign Exchange - no WPU (F)	0	0	0	0
J1 Foreign Exchange - WPU (J)	0	0	0	0
Other				
Unduplicated Cumulative Count	569		595	
Students enrolled less than 180 days	141		103	

Demographics as of Oct 1, 2017 (* All counts are as of Oct 1 except Limited English and Homeless)							
Categories		Count	Prior Year Count	Categories	Count	Prior Year Count	
Overall		480	541	Limited English Proficient	166	152	
Ethnicity / Race	Hispanic/Latino	191	220	(* Cumulative)	Refused Service	0	
	American Indian	8	6		Fluent	28	35
	Asian	8	8		Total	194	187
	African American/Black	24	19		Selected Flags	Homeless	10
	Pacific Islander	33	39	Homeless (* Cumulative)		12	8
	White	413	470	Migrant	0	0	
Gender	Female	235	254	Tribal Affiliation	Goshute	0	0
	Male	245	287	Navajo	1	0	
Free Lunch	Eligible for Free	307	355	Paiute	0	0	
	Eligible for Reduced Price	71	61	Northwest Band Shoshone	0	0	
	Economic Disadvantaged	0	0	Ute	0	0	
	"Disadvantaged" Total	378	416	Other Tribe	7	0	
Special Education	Time 'A'	39	43	Youth In Custody	Time 'A'	2	
	Time 'B'	26	24	Time 'B'	0	0	

EXAMPLE OF SCHOOL SUMMARY CUMULATIVE REPORT

DEMOGRAPHIC COUNTS

- ▶ Double check demographic counts.
 - ▶ We look for big, unexpected changes as compared with the previous year.
 - ▶ You can review this data in the *School Summary Cumulative* report.
- 

READING ON GRADE LEVEL (ROGL) STATUSES

- ▶ For students who don't have a vendor test record, we need a code to explain why they were untested.
 - ▶ Expectation is that most LEAs will have some students with AY, AN, O, S, or U.
 - ▶ We look for LEAs with 0 or very few of these codes.
 - ▶ Y and N codes are optional to enter into SIS (we don't have a way to load these for you). But, most LEAs find it helpful to enter these since it makes it part of the SIS record, and helps in identifying the students who need one of the other ROGL statuses entered.
 - ▶ This is important because if no code is entered and we assume the student was untested, then a "U" gets put in the denominator of the participation rate.
 - ▶ You can review this in aggregate in the *School Summary Cumulative* report, or view student data by downloading the *Reading on Grade Level with UGG* report in UTREx Reports under *Assessment Reports*.
- 

READING INTERVENTIONS

- ▶ Reading interventions are required for grades 1-3 or fatal error is triggered.
 - ▶ You can review this in aggregate in the *School Summary Cumulative* report, or view student data by downloading the *Reading on Grade Level with UGG* report.
- 
- A decorative graphic consisting of several parallel teal lines of varying lengths and orientations, located in the bottom right corner of the slide.

KINDERGARTEN TYPE

- ▶ We will review this data by checking against a list of schools receiving OEK and KSEP funds, though we know that other schools also provide extended kindergarten through local funds.
 - ▶ The goal is to make sure that 'NN' (half day) isn't reported when it should be something else.
 - ▶ Your SIS might use 'NN' (half day kindergarten) as the default kindergarten type. This *needs to be updated* if the student has extended or full day kindergarten.
 - ▶ You can review this data in the *School Summary Cumulative* report.
- 

INCIDENT DATA

- ▶ **We don't expect any LEAs to have zero incidents!**
 - ▶ We are looking for LEAs who have 0 or very few incidents reported relative to their total enrollment.
 - ▶ The threshold we will use to review the data is 1 incident per every 50 students- you want to be lower than that.
 - ▶ The purpose is to improve data quality and avoid potential consequences.
 - ▶ If no incident data is reported for special Ed (no disciplines) for 3 consecutive years, then LEA will receive a risk score 5 in results driven accountability.
 - ▶ We are working on the definition for Persistently Dangerous Schools- in the future, LEAs reporting no incident data will be added to this group.
 - ▶ You can review this data in the *Discipline Incident Summary* report in UTREx Reports under Year Round Reports.
- 

SCRAM EXTENDED SCHOOL YEAR (ESY)

- ▶ Funding for ESY is generated off the year end data.
 - ▶ We look for big, unexpected changes as compared with the previous year.
 - ▶ You can review this data in the *SCRAM Extended School Year* report in UTREx Reports under Year End Reports.
- 

HIGH COUNTS OF STUDENTS WITH LESS THAN 160 DAYS OF MEMBERSHIP

- ▶ The norm is that students should have 180 days of membership.
 - ▶ For most LEAs, we don't expect to see a large percentage of students with less than 160 days of membership.
 - ▶ If we do see this, it could be a sign that there's an issue with how the membership is being reported.
 - ▶ You can review this data in the *School Summary Cumulative* report.
- 

EARLY GRADUATES

- ▶ For early grads, both a high school completion status code and an early exit code must be submitted to generate the incentive funding.
 - ▶ In particular, we check whether there are enough '11' exit codes reported to match the number of grade 9,10,and 11 graduates.
 - ▶ Early grads can be submitted under grades 9,10, or 11, but 11 is the most common to check. Look at high school completion status and the early graduate counts.
 - ▶ Entering this data correctly affects an LEA's ability to earn funding.
 - ▶ You can review this data in the *School Summary Cumulative* report.
- 

REPORTED CREDITS ATTEMPTED, CREDITS EARNED, AND COURSE GRADES

- ▶ This is used in high school accountability, grades 9-12.
 - ▶ We expect to see high percentages.
 - ▶ Reason for low % might be that LEA has not entered credits earned yet.
 - ▶ LEAs will lose accountability points if data is not entered.
 - ▶ You can review this data in the *School Summary Cumulative* report.
- 

FINAL COMMENTS

- ▶ If you are ready for a review, please contact us at any time. You don't have to wait till year end or when school is out. Earlier is better for review, and you are welcome to contact us multiple times!
 - ▶ *If we don't hear from you....then we will start the review process of all LEAs during the week of June 24-28.*
 - ▶ Final submission deadline is **July 8 at 5pm.**
 - ▶ Data and Statistics Contact Information:
 - ▶ <https://schools.utah.gov/data/contact>
 - ▶ DataStatisticsHelp@Schools.Utah.Gov
- 

VALIDATIONS THAT START TO TRIGGER AT YEAR END

Level 1 Validations:

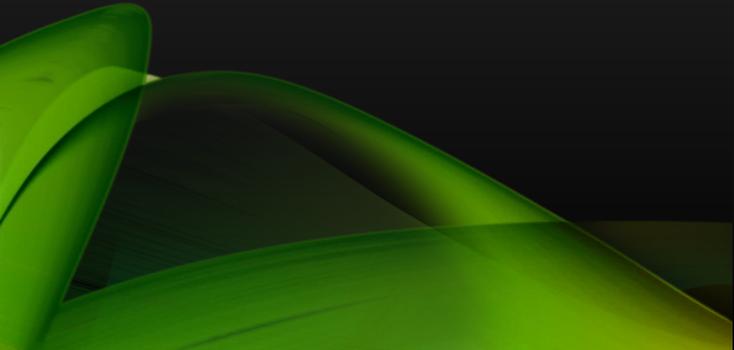
AC.817	S1.344	S1.365	S3.709
AC.818	S1.347	S2.612	S3.710
AM.905	S1.351	S2.613	SC.206w
AM.908	S1.355	S2.614	SC.207w
AM.911	S1.356	S3.708	

Level 2 Validations: Student School Membership Warning

See the UTREx Specifications for more information about these validations:
<https://www.schools.utah.gov/informationtechnology/utrex>



DATA SUBMISSION TIMELINE



JUNE 24TH

- Last day to submit historical updates
 - You can still submit them after this date, but there is no guarantee that they will be completed in time for the year-end upload deadline.

JULY 8TH

- There is no 'soft' and 'hard' deadline for Year End
- The Year-End Deadline is July 7th
 - Since July 7th falls on a Sunday this year, the deadline is moved to July 8th by 5 PM
- Data must be finalized by the LEA by 5 PM

May 16, 2019
Training

Data Finalization Process

Steps to Finalizing a UTREx Submission

1. Go into the UTREx Overview
2. Select the Finalize button for the submission period (will only appear for the few weeks leading up to a UTREx deadline)
3. Select Finalize in the pop-up window
4. Wait for the system to process the data. If the submission was successfully processed the status will be 'Completed'. If there was an error, the status will be 'Error Finalizing'
5. Download reports from the submission that was finalized

The following slides will walk through these steps in more detail

Step 1: Go to the UTREx Overview

- Access the UTREx Overview
- Within a few weeks of the upload deadline a Finalize button will appear
- If you do not see the 'Finalize Data' box, it might mean that your UTREx role does not allow you to finalize submissions

Status: Processed 12/6/2017

Collection		Data Collector Report Collector
Manifest	UTREx	
Manifest Version	8.01	
Collection Started	12/6/2017	
Collection Completed	12/6/2017	
Validate Started	12/6/2017	
Validate Completed	12/6/2017	
Level 1 FataIs	0	
Level 1 Warnings	84	
Examine Data		
Certified		

Submission	
Submission	12
Started	12/6/2017
Completed	12/6/2017

Received by State		Status: Processed
Report ID	14033	
Submission	12	
Processing Started	12/6/2017	
Processing Completed	12/6/2017	
Level 2 FataIs	0	
Level 2 Warnings	0	

[View Data »](#)

Finalized Data

Finalizing your data is the last step of submitting your data to the state during key submission windows. October, December, and Year End are the 3 windows that are available for finalizing data.

October Data	10/1/2017 - 10/15/2017
Status	
December Data	11/27/2017 - 12/7/2017
Status	
Finalize December Data Using Submission 12	
Year End Data	5/1/2018 - 7/15/2018
Status	

Reports for Finalized Data

Step 2: Select the Finalize button

- When the current date is within a submission window, a Finalize button will appear.
- After an LEA has completed updating their data, clearing their validations, and auditing their data (including a courtesy data review from USBE), the LEA can finalize their data by pushing the Finalize button.
- For the October and December uploads this Finalize button takes the place of pausing submissions. For the Year-End upload you still need to delete automatic submissions.

Finalized Data

Finalizing your data is the last step of submitting your data to the state during key submission windows. October, December, and Year End are the 3 windows that are available for finalizing data.

October Data 9/28/2017 - 10/10/2017
Status

December Data 11/27/2017 - 12/11/2017
Status

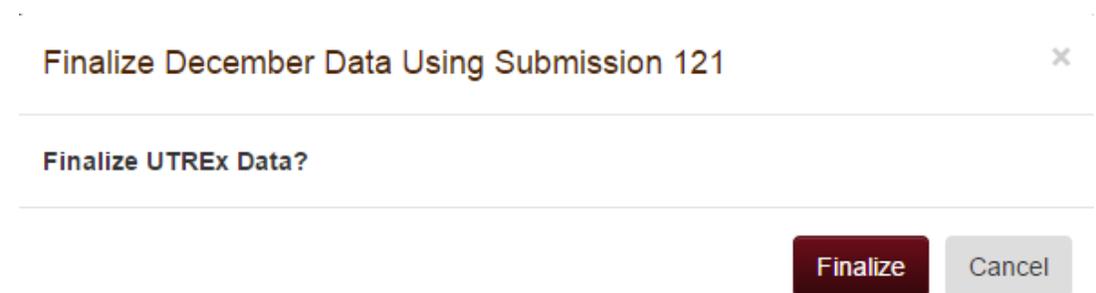
 **Finalize December Data**
Using Submission 12

Year End Data 5/15/2018 - 7/7/2018
Status

 [Reports for Finalized Data](#)

Step 3: Select Finalize in the pop-up window

- After selecting the Finalize button, the system will ask you if you want to Finalize UTREx Data?
- Finalizing the data will store the LEA's last submission as the official submission for that deadline.
- While the data is processing, the status will be 'New Request' or 'Finalizing'.



Step 4: Wait for the system to process the data

- Once the data has been stored, the status will change to 'Completed' and the requested date will appear along with the email address of the person who finalized the data.
- If the data did not correctly finalize, the status will say 'Error Finalizing'. Resubmit and re-finalize, or contact the UTREx Helpdesk if this occurs.

Finalized Data

Finalizing your data is the last step of submitting your data to the state during key submission windows. October, December, and Year End are the 3 windows that are available for finalizing data.

October Data	9/28/2017 - 10/10/2017
Status	

December Data	11/27/2017 - 12/11/2017
Status	Completed
Report ID	140126
Submission	70
Requested	12/6/2017 4:28:00 PM by w@schools.utah.gov

Year End Data	5/15/2018 - 7/7/2018
Status	

 Reports for Finalized Data

Step 5: Download finalized reports

- Once the data is finalized, final reports can be viewed with the report link at the bottom of the box.
- These are the reports that should be archived for future reference and audits.
- These reports will not change as new data is submitted to UTREx.
- This functionality might not yet be active – immediately after finalizing download your Year End reports from the UTREx Reports screen.

Finalized Data

Finalizing your data is the last step of submitting your data to the state during key submission windows. October, December, and Year End are the 3 windows that are available for finalizing data.

October Data 9/28/2017 - 10/10/2017

Status

December Data 11/27/2017 - 12/11/2017

Status Completed

Report ID 140126

Submission 78

Requested 12/6/2017 4:28:00 PM by w@schools.utah.gov

Year End Data 5/15/2018 - 7/7/2018

Status

 Reports for Finalized Data

Potential Issues

Issue

What to do...

An error occurs when attempting to finalize the data.

Resubmit and Re-Finalize, or contact the UTREx Helpdesk

The data is finalized and then later some updates need to be made to the finalized data.

You can resubmit and re-finalize your data as many times as you need to until the submission deadline.

The data is ready to finalize, but USBE has not completed a courtesy data review. Can the data still be finalized?

Data can be finalized without a review by USBE, though we recommend having the review completed before finalizing the data.

It is 5pm of the deadline, and no one finalized the data.

The LEA will not have any data in the Finalized dataset.

It is June 5th and the data is finalized, can the system rollover to the new school year?

Current limitations of UTREx allow only current year of data to be submitted. LEAs still have to wait until after July 7th to submit a new year of data.

Takeaways from last
submission

Data Submission Errors

Finalize Button

- About half a dozen LEAs received an error when finalizing their data submission. They hit the Finalize button before their data was fully submitted to UTREx
- Make sure that the 'Received by State' box has a date and time showing the Processing Completed.
 - Give it a few minutes before you start the finalize

Report ID	185673
Submission	
Processing Started	12/10/2018 8:49:05 AM
Processing Completed	12/10/2018 8:50:18 AM
Level 2 Fatals	0
Level 2 Warnings	6 

[View Data »](#)

Finalized Data

Finalizing your data is the last step of submitting your data to the state during key submission windows. October, December, and Year End are the 3 windows that are available for finalizing data.

October Data

10/1/2018 - 10/9/2018

Status	Completed
Report ID	176682
Submission	55
Requested	10/9/2018 9:09:33 AM by 

December Data

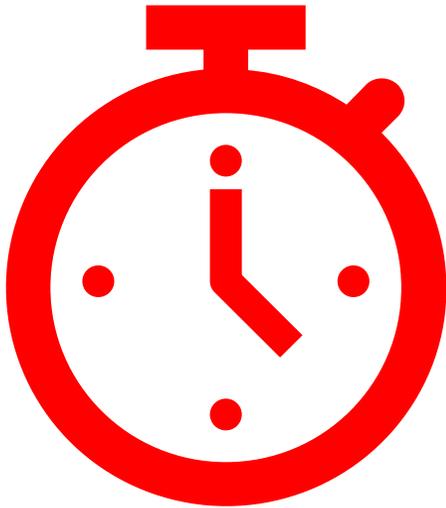
12/1/2018 - 12/10/2018

Status	Error Finalizing
Report ID	185106
Submission	101
Requested	12/10/2018 8:49:40 AM by 

Scheduled nightly uploads

- One LEA had their scheduled nightly upload start running after they had started the finalize process, interrupting the finalize process.
 - Be aware of when your nightly uploads occur.
 - Possible solutions:
 - Pause or delete the automatic submissions
 - Log back in to verify whether your finalize process completed successfully.

Submission Deadline



- During the last submission period, a couple LEAs waited until late in the afternoon of the 10th.
 - If you need extra time to get your data cleaned and finalized be aware that everything will take longer due to the higher traffic on the system.
 - If you finalize in the afternoon of the submission due date, you may need to log in throughout the afternoon and into the evening to verify that your submission completed successfully.
 - If the Finalize fails you will have only a limited time to resubmit and re-finalize your data.

After data finalized

Year End Reports

Reports to Archive

- Under UTREx reports, be sure to download the four reports found under Year End Reports, and archive them so you will have them for reference later.

December Reports

Child Count by District Worksheet
School Summary SCRAM
SCRAM CCW Detail

Year End Reports

Consolidated Membership Cumulative
School Summary Cumulative
SCRAM Extended School Year
Transfer Student List

Assessment Reports

New Student ELP Scores
Reading on Grade Level
Reading On Grade Level with PACE
Reading On Grade Level with UGG
RISE Class List
Students Eligible for WIDA ACCESS
Utah Compose Class List
UTIPS Class List

End of Year

Scheduled Collections

UTREx Data Collector

Manage Collections

[Collection Requests](#) | [Collection Status](#) | [Submissions](#) | [Progress](#) | [Archives](#)

[Collection Requests Summary](#) > [Manage Scheduled Collections](#)

Manage Scheduled Collections

The following is a list of all scheduled collections for the current submitter organized by collection request. Use the delete link to remove a selected item, or click on an item to edit the scheduled collection.

[Select All](#) | [Select None](#)

Start Date & Time	Recurrence	Scheduled Action	If in Progress	Last Started	Status
▼ UTREx					
<input type="checkbox"/> 05/06/2019 04:00 PM	Daily w/Weekdays ends	Collect, Validate & Submit	Overwrite	N/A	Normal
<input type="checkbox"/> 05/06/2019 10:00 PM	Daily w/Weekdays ends	Collect, Validate & Submit	Overwrite	N/A	Normal

[Delete Selected](#) | [Pause Selected](#) | [Resume Selected](#)

Recommendations for Year End

- We recommend you delete your Scheduled Collections at year-end after you have submitted your Final Collection.
- You will avoid issues with your Scheduled Data Collections for the new School Year.
- If you pause your Data Collection, it will no longer collect at the designated time.
 - We do not recommend pausing your Data Collections at year-end and resuming the following School year.
- An email will be sent out when it's time to start collections in the new School Year.