Student Record Exchange

SRE

2014 – 2015
User’s Guide

Please Note: This help resource may refer to screen elements by their color and may be best viewed in full color.

http://www.ksde.org/Agency/FiscalandAdministrativeServices/InformationTechnology(IT)/StudentRecordExchange(SRE).aspx

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# Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Reason for Changes</th>
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<tbody>
<tr>
<td>3/30/2015</td>
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# Related Documents

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Title/Location</th>
<th>Comments</th>
</tr>
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<tbody>
<tr>
<td>4/29/14</td>
<td><strong>Quick Start Guide to SRE</strong></td>
<td>This is a short resource to help you navigate the SRE system.</td>
</tr>
<tr>
<td>4/29/14</td>
<td><strong>Registering for Access to SRE in Common Authentication</strong></td>
<td>This document describes how to register for access to SRE or how to add SRE to an existing username in Common Authentication. This document also contains a description of the various access levels for SRE</td>
</tr>
<tr>
<td>4/29/14</td>
<td><strong>SRE Contact in Directory Updates</strong></td>
<td>This document explains the relationship between SRE and the Directory Updates system. It also describes where in Directory Updates you can edit the SRE Contact data.</td>
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I. Introduction

Student Record Exchange (SRE) is available to all public school districts and accredited private schools. SRE provides a secure and efficient electronic exchange of student records as students move between schools in Kansas. SRE takes advantage of KSDE’s common authentication system and secure socket layer technology to provide a safe and secure way to send and receive student records.

When there has been activity in SRE for a building, an email is sent to the email address indicated as the SRE Contact in the Directory Updates system. For more information about this SRE contact, see the SRE Contact in Directory Updates section of this guide.

The SRE system provides two schools a system to request, fulfill, send, and receive student records electronically.

Whether you have been involved with SRE since its pilot stage or are brand-new to the SRE system, the Kansas State Department of Education (KSDE) wants to be sure that you have information and resources to make the request and submission of students’ records run smoothly.

If you are a “veteran” SRE user, then this manual will serve as a reference that you can use to review the increased functionality of the SRE system.

If you are a new SRE user, then this manual will give you a jump-start on the basics of the software system before you begin submitting or fulfilling requests for student records at your school or district.
II. About this Manual

This User’s Guide will describe how to:

- Initiate a request for students’ records in the SRE System;
- Respond to requests for students’ records and upload records in the SRE System;
- Monitor the SRE System for records status;
- Update status of students’ records in the SRE System;
- Find the SRE Contact at any building that is eligible to use SRE;
- Search for a student’s prior school and district contact information;
- Search for a student;
- View previous records requests; and
- Generate reports that display information submitted to the KIDS System.

We have also included some notes and tips that highlight important topics.

**NOTE:** The “Notes” box will mention items that require special attention.

**TIP:** The “Tip” box will contain recommendations and/or “shortcuts” as the user works through SRE.
### III. Important Terms

Are you new to the vocabulary of SRE? If so, don’t worry—KSDE has created a glossary of terms to help clarify words and phrases that may be unfamiliar to you. Please take a minute to review these important terms before continuing:

<table>
<thead>
<tr>
<th>Term</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Data Screen</td>
<td>Screen listing SRE contact and other information regarding that school.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Page listing five most recent request made by the enrolling school or the prior school.</td>
</tr>
<tr>
<td>FERPA</td>
<td>FERPA (Family Educational Rights and Privacy Act) protects the privacy of student education records and applies to all schools or education agencies or institutions that receive funds under an applicable program of the U.S. Department of Education.</td>
</tr>
<tr>
<td>Opt Out</td>
<td>Option allowing districts and buildings to notify student record requesters that responders are out for a period of time and requests will be replied to at a later date or that SRE is not being used for records requests.</td>
</tr>
<tr>
<td>Request Completed</td>
<td>Enrolling school downloaded or received the student records.</td>
</tr>
<tr>
<td>Request Responded</td>
<td>Prior school attached requested records or sent them by fax or mail.</td>
</tr>
<tr>
<td>Request Submitted</td>
<td>Enrolling school submitted a request for student records.</td>
</tr>
<tr>
<td>Request Updated</td>
<td>Enrolling school updated the student records request.</td>
</tr>
<tr>
<td>School/District Receive</td>
<td>Access level for school or district with the authority to receive student record requests only.</td>
</tr>
<tr>
<td>School/District Send</td>
<td>Access level for school or district with the authority to respond to student record requests only.</td>
</tr>
<tr>
<td>School/District Send/Receive</td>
<td>Access level for school or district with the authority to request student records and respond to student record requests.</td>
</tr>
<tr>
<td>SRE Contact</td>
<td>The designated staff member(s) at a school authorized to send and receive student records.</td>
</tr>
</tbody>
</table>
IV. SRE Contact in Directory Updates

The Directory Updates system contains an SRE Contact for each building in each district. This contact information contains a name and email address. It is displayed in SRE as a point of contact for a district requesting students’ records. The email for the SRE Contact is where an alert is sent indicating that activity has occurred in SRE for that building.

The Student Record Exchange Contact is located on the Building Data screen of the Directory Updates system. Unless these fields have been edited, the default data are the principal for the building. We recommend that the person responsible for sending and/or receiving students’ records for each building replace the building principal’s contact information in the Student Record Exchange Contact fields in the Directory Updates system.

Note: Because there may be multiple people responsible for students’ records, it is our best practice recommendation that a group email or distribution email be used rather than one individual email in the Email Address field.
V. Registering for Access to SRE

A. Gaining Access to SRE—new login:
Individuals who do not have access to KSDE web applications need to register. Use the following web address: https://online.ksde.org/authentication/login.aspx. At this website, click on the Register button, as shown below:

NOTE: Skip this section if you have used SRE before, or if you already registered for access to SRE.

On the Registration page, enter your business contact information (First Name, Last Name, Phone #, and Email Address). Next, select your organization from the “Organization” drop-down list. From the “Building” drop-down list, select “All Buildings” for district-level access or select your specific building for school-level access.
Application Access Level

A list of available applications is now displayed. Scroll down to “Student Record Exchange” and select the checkbox in the first column to choose that application. From the Application Access Level column, select the level that is appropriate for you (see the User Access Levels section found later in this document). The following example displays the district-level option since “All Buildings” was selected from the “Building” drop-down list.

![Application Access Level Example]

Login ID

Enter a user name (login ID) and password. You determine your login ID. Do not use spaces. You will also determine your password, but be sure to follow the password requirements that are shown on the screen.

TIP: Do not use spaces when defining your login ID. When creating your password keep in mind the password requirements shown on the screen. You will need to remember the Login ID, password, security question/answer, and birth date that you entered. KSDE does not store this information for you.

![Login ID Example]
Security Questions

When registering for any application you are required to provide two pieces of security information. These are used to help retrieve your password if you forget it, or to make any subsequent changes to your login once it has been established. First, enter your birthdate following the format shown on screen. Second, enter a security question and answer. When you have completed all required information on the registration form, click the “Submit” button at the bottom of the screen.

If all data are valid, you will get a message that says “Thank You for Registering.” The registration request will be forwarded to the district superintendent for approval. You will receive an email when your access request is approved and your username and password are ready for use. Approval may take several business days. The application will appear in the list of available applications, but will gray out and will be inaccessible until approval has been granted.

NOTE: If you do not receive the email announcing you are approved within three business days, check to see if the email was sent to your spam or junk folder. If not, contact the superintendent for verification that approval was granted. Contact KSDE Help Desk at 785-249-7935 if the superintendent has sent the email reply, but you have not received the confirmation email.

B. Gaining Access to SRE—existing login:

Individuals who already have access to KSDE web applications can use the Manage My Account option to add the SRE to their list of applications. If the existing username is at a different access level than what is required for SRE, a new registration will need to be created (see the previous section for guidance on creating a new login). Your request will be sent to the district superintendent for approval. When approved, you will receive an email indicating that you can access SRE.

To add SRE to your list of available KSDE web applications…
- Login on the KSDE Web Applications page
- Click the “Manage My Account” link
Check the box in front of Student Record Exchange
Select your access level
Scroll down and answer the security question exactly the way you did when you registered
Click “Submit”

Your request will be sent to the district superintendent for approval. When approved, you will receive an email indicating that you can access Student Record Exchange.

**TIP:** If you forget your KSDE web applications password, click on the link that says “Forgot Your Password?” on the Authentication screen. You will be prompted to supply the answer to a security question (you entered it when you originally registered), type in your birth date, and enter a new password. If your security question answer and birthday match what you originally entered when you registered for KSDE web application access, then your new password will be activated. Keep in mind that KSDE does not know your password, so you are responsible for managing and remembering it.
VI. User Levels

<table>
<thead>
<tr>
<th>Role</th>
<th>Search School Contact</th>
<th>Submit Request</th>
<th>Student Search</th>
<th>Run Reports</th>
<th>Send Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Send/ Receive</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>School Receive</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>School Send</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>District/Organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District/ Send/ Receive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>District/ Receive</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>District/ Send</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

VII. Logging into SRE

SRE, like the other KSDE web applications, is available on the KSDE Authentication page. To access SRE, enter your KSDE username and password to the KSDE Web Applications page (https://online.ksde.org/authentication/login.aspx). The user will see SRE on his/her list of approved KSDE applications (example list shown below), and he/she will need to click on Student Record Exchange to open it.

NOTE: Some of the applications may be grayed out. This means that they are either not active applications, or that you have not yet been approved for access to those applications.
VIII. “Tour” of SRE

A. Dashboard

This will be the first screen the user sees. It will display the five most recent requests sent and/or received, depending on your access level.

![Dashboard Image]

**NOTE:** The request rows will change to a blue color for requests that are over 7 days old. A request becomes inactive after 30 days from the last day a file was uploaded.

Depending on your access level, you may see different options in the left navigation pane.

![Left Navigation Pane Image]

This screen is for a school send only user. The menu choices are limited.
B. Search School Contact Info

The Search School Contact Info screen is where you will look for the SRE Contact information for any building that is eligible to use SRE:

Select the student’s prior district from the district dropdown list. A list of buildings for that district is displayed in the table.

With the list of buildings displayed, click on the ‘Request Records’ link for the building where you would like to send the request.

If the SRE Contact that is displayed for your building is not correct, the data needs to be updated in the Directory Updates system. Please see the SRE Contact in Directory Updates or the “SRE Contact in Directory Updates” guidance document available on the SRE webpage for more information.
**C. Submit Requests**

This section provides information on where you submit requests for records from another building.

*TIP:* Depending on whether you reached the Submit a Request page by selecting the link in the left navigation pane or if you used the “Request Records” link from the Search School Contact” screen, you may need to select a district and school before selecting the enrolling building or you may be able to immediately begin selecting documents.
Select all of the requested Documents that you would like to have from the prior district.

After selecting the Submit button, the follow screen appears. You can view the request via filtering for the district and school or using the My Requests link.
Once the request has been sent, an email, similar to the one below, is sent to the person listed as the SRE Contact in the Directory Updates system for both the sending and the receiving building.

```
Mike Jordon: There have been student records request activity for your school. Please log into the Student Record Exchange application to see the detailed information about the request(s).
https://online.ksde.org/authentication/login.aspx
```

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>176</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

**NOTE:** When there has been activity in SRE for a building, the system sends out an email notification approximately every two hours during the work day indicating that activity has occurred in a records request in SRE.

**D. My Requests**

This screen displays the same information that is displayed in the “My Requests” table on the “Dashboard.” It contains a list of all the records requests you have sent.

View any of the requests by selecting the “View” link in the left column. You can also filter by the request (All, Active, or Inactive) or by the status of the request (All Statuses, Submitted, Responded, Completed/Cancelled, or Updated).
When you select a request, you will see the detail information. The optional text box allows the requester to specify documents outside those in the list.

A notes text box allows for further details regarding the request, while the rest of the page provides more information about the buildings.
To view documents requested, select the Add/View Documents button (above).

E. Received Requests

This screen contains the same information displayed in the “Received Requests” table on the “Dashboard.” It contains a list of all the records requests that have been sent by another building.
View any of the requests by selecting the “View” link in the left column. You can also filter by the request (All, Active, or Inactive) or by the status of the request (All Statuses, Submitted, Responded, Completed/Cancelled, or Updated).

To submit documents requested, select the Add/View Documents button.

If the certification box is not checked a red error reminder displays.
The Manage Documents screen allows you to upload files if you are the prior school.

**NOTE:** See the file restrictions above for accepted file formats, file size, and file name limitations.

Click “Select File” to browse file to upload to send to the requesting school. Select “Finished” once all files are uploaded.

The system sends out an error message if anything other than alpha characters is used.
**F. Student Search**

The Student Search screen is where you will search for a student to submit a request.

This screen provides the ability to search for a student and view data submitted in the KIDS system. The student search feature requires you to have a few basic pieces of information about the student to complete the search.

**TIP:** Remember to select the required FERPA “Certification” checkbox or you will get an error message.
G. Reports

This screen helps generate reports that display information submitted to the KIDS system. The data may be useful for you when determining where the student was previously attending, what courses the student took, and if there are services that the student received or programs the student attended while attending a prior school.

From the dropdown list reports can be selected to find out more about students.

The Enrollment History report shows all the schools where the student was reported as having attended in the past and the dates of attendance.
The Enrollment History displays in either an Excel or PDF document. All reports will have this option. All student data are from KIDS uploads.

The Student Courses report shows all of the courses that have been reported for the student in the KIDS Collection System.

The column headings are the same, however the rows may vary depending on the student course upload history.
The Student Records report shows the final version of some of the data submitted on ENRL, TITL, MILT, TEST, EXIT, and EOYA.

The data displayed is from the most recent information on the student submitted via KIDS.

NOTE: More information on the various collections see the Submission Overview document located on the “Documents” tab of the KIDS website: Kidsweb.ksde.org.
The Assessment History report shows the last state assessments ordered for each student.

Remember to check the required FERPA “Certification” checkbox.

Assessment History report example:

- **Student Name:** Maverik Christmann
- **Student ID:** 4131377829
- **Date of Report:** 3/25/2015 10:19 PM

<table>
<thead>
<tr>
<th>Year</th>
<th>Grade Level</th>
<th>Subject Area</th>
<th>Subject Area ID</th>
<th>Performance Category</th>
<th>Performance Category ID</th>
<th>Gender</th>
<th>Primary Disability Code</th>
<th>USTF Code</th>
<th>Total Questions</th>
<th>Total Responses</th>
<th>Responses Correct</th>
<th>Test Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>Tenth Grade</td>
<td>Math</td>
<td>3</td>
<td>Reading (proficient)</td>
<td>M</td>
<td>NO</td>
<td>NO</td>
<td>BH</td>
<td>84</td>
<td>84</td>
<td>40</td>
<td>2</td>
</tr>
<tr>
<td>2017</td>
<td>Tenth Grade</td>
<td>Math</td>
<td>3</td>
<td>Reading (proficient)</td>
<td>M</td>
<td>NO</td>
<td>NO</td>
<td>BH</td>
<td>84</td>
<td>84</td>
<td>40</td>
<td>2</td>
</tr>
<tr>
<td>2018</td>
<td>Eleventh Grade</td>
<td>Math</td>
<td>3</td>
<td>Reading (proficient)</td>
<td>M</td>
<td>NO</td>
<td>NO</td>
<td>BH</td>
<td>84</td>
<td>84</td>
<td>40</td>
<td>2</td>
</tr>
</tbody>
</table>
H. Opt Out Option

This option allows users to select an “Out of Office” option where no staff will be able to respond to requests for records due to winter, spring, or summer breaks and other school events. Users will be able to select their district and schools depending on their access levels. Additionally users can select a date when staff is available to receive requests.

When a school or district is in the process of sending a records request to another school or district that has opted out of SRE a message similar to the following will be displayed on the Submit Request window before the “Submit” button is clicked.

IX. Help Resources

If you have difficulty working with the SRE system, please contact the KSDE Help Desk during regular business hours at (785) 296-7935. By contacting the Help Desk, your questions will be directed to the appropriate staff member.

If you need assistance or guidance on how to report a specific data element for a student, submit your questions via email to sre@ksde.org or visit the SRE Project website at http://www.ksde.org/Default.aspx?tabid=884 for more information.

For more information on FERPA refer to the Privacy Technical Assistance Center (PTAC) on the National Center for Education Statistics website (http://nces.ed.gov/programs/ptac/).