



Office of the Independent Monitor

MISIS Initiative

An Evaluation

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Prepared by

TechGnosis, Inc.

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1. Introduction

This document is intended to convey a realistic assessment of LAUSD's status pertaining to technology requirements of the Modified Consent Decree (MCD).

1.1 Background:

The ISIS project began in earnest in 2003 when LAUSD contracted with Maximus to provide software and services. Since then, the project has been through many incremental, partial software rollouts, multiple vendors, litigation with one vendor, significant technological changes, abandonment of the initially selected software platform, 3 different software development methodologies, repeated leadership changes, including at least 5 LAUSD Project Directors/Managers, and reported to 3 different Chief Information Officers. The current ITD and MISIS Project leadership team has brought stability, focus, and better organization to the initiative, and is striving to get to "the finish line."

1.2 Measuring Compliance with the MCD:

The Office of the Independent Monitor (OIM) received a report on September 7, 2010 from the LAUSD ISIS Project team (indirectly through the LAUSD Office of the General Counsel) called the "ISIS Checklist." The ISIS Checklist was intended as a tool for discussion in a September 13, 2010 meeting of the parties (to the Modified Consent Decree). During this meeting, or soon thereafter, counsel for the parties declared that this ISIS Checklist was inadequate.

TechGnosis, Inc. (TGI or TechGnosis) was hired subsequently to evaluate the ISIS Checklist report to determine its adequacy with regard to the entire ISIS, and the obligations of LAUSD to deliver an integrated student information system as described in the Chanda Smith Modified Consent Decree (MCD). The TechGnosis report (dated September 29, 2010 and revised October 1, 2010) addressed details from the original ISIS RFP and its associated requirements, and "The Consultant's Report", both of which are included in the MCD.

TechGnosis, Inc. consultants conducted a thorough review of:

- The Request for Proposal (the RFP) for a Student/School Information System and Related Services, version 1.0, issued in June of 2002 .
- Appendix B – ISIS Functional Requirements. This is the requirements detail issued along with the RFP.
- Appendix A – ISIS Technical Requirements. This is a spreadsheet that described the then-current technical expectations of the District for the ISIS solution.
- Chanda Smith v. LAUSD Consultants' Report, dated October 1995
- Additional ISIS-related documents, such as the Considerations for Integrated School Information Systems (ISIS) Partnerships document from March, 2002 that set expectations for preliminary discussions with prospective software vendors.

TGI recommended format, component, and content changes to the ISIS Checklist, and the changes were implemented. Late in 2010, the District, the IM, and MCD Plaintiffs accepted a new ISIS Checklist that would be used to guide and measure LAUSD's progress toward compliance.

1.3 Requirements:

In 2013, LAUSD elected to abandon the "SchoolMax" technology platform that had been used to date for ISIS, restarted the project with new technology, and rebranded the project as "MISIS." This became essentially a restart of the initiative, and in order to meet all items on the ISIS Checklist, a new set of detailed "requirements" was produced by the MISIS team. These detailed requirements were all deemed necessary in support of the District's needs and the ISIS Checklist. In many cases, a single item from the ISIS Checklist had multiple requirements in the new MISIS Requirements Checklist. From that point forward, the MISIS Requirements Checklist has been used as a detailed progress measurement tool, and in discussions between MISIS Project Management and the OIM. Both the ISIS Checklist and the MISIS Requirements List are included in the appendices of this document.

There are 149 items in the ISIS Checklist. They are presented in 2 tables and a graphical depiction. The first table conveys, at a higher level, the intent of the MCD as described by the 1995 Consultants' Report and the 2002 RFP objectives. The second contains a list of the major and minor business processes/items from the RFP's Functional Requirements Appendix that must be satisfied in some manner either by ISIS, or by an interface from ISIS to an external system. Finally, the graphic depiction represents a visual of how the various pieces of ISIS should work together when finished. There are 10 items in the first table, and 139 items in the second one.

The MISIS Requirements List contains 539 individual items. They are organized the same way as the second table of the ISIS Checklist, by major and minor business processes and/or items. Every item from the ISIS Checklist table 2 is included. Many of the 539 items are duplicated, because the same detailed requirement may be used (along with others) to satisfy more than one ISIS Checklist item.

1.4 Tracking Progress:

Throughout the long history of this ISIS/MISIS initiative, different methodologies have been used for project management, including very detailed waterfall-style work plans, milestone charts, implementation of the Microsoft TFS software for requirements tracking, etc. The track record of this initiative, as measured against any of these tools, would be spotty at best, for a myriad of reasons. These have included poor quality work by vendors, lack of, or delayed acquisition of personnel resources, and technical problems, among others. Software has been delivered by vendors or by in-house teams, and implemented, but frequently not according to the expected timeline, and in at least one case, with serious flaws. The software development processes and cycles are now significantly improved, reliable, and predictable.

By using the ISIS Checklist, and now the MISIS Requirements Checklist, we are able to establish that the functional content of MISIS either meets or does not meet expectations of the MCD. Those two documents are the tools employed for this evaluation.

Since the most recent changes in leadership occurred, we have routinely reviewed functionality with MISIS Project management and subject matter experts as it has been developed, debated whether or not it met the intent of the checklist, and generally been able to closely monitor progress. This relationship has been open, collaborative, and highly beneficial.

The overriding theme of discussions was influenced by alignment with the following excerpts from the June 2002 Request for Proposals:

Section 5.0 Future Vision, acknowledges the District's obligations under the Chanda Smith Consent decree with these words:

"...the Chanda Smith Consent Decree includes court-mandated requirements with which the District must comply. In part, the Consent Decree states "The District shall: (1) centralize and computerize all educational records of all District students; and (2) develop and install a comprehensive special education management information system."

In the same section of the RFP, LAUSD's vision for ISIS is articulated as follows:

The District envisions an Integrated Student/School Information System (ISIS) as a centralized repository of student and school information that will ensure the needs of all of its 1.2 million pre-school to adult students are met in the most efficient and comprehensive manner. Some of the key components of this ISIS vision are:

- o A solution or a set of solutions that are fully-integrated, and are built using mainstream technologies on an open architecture that is portable and scalable*
- o One centralized system for all students (i.e. infants to adulthood in both general education and special education)*
- o A single repository with no data redundancy (i.e. Capture data once at the point of origin)*
- o Open, secured access for all authorized users*
- o User-friendly, browser-based graphical user interfaces with workflow features that simplify and streamline data entry*
- o Built-in precautionary alerts to trap exception conditions before they become problems*
- o Flexible querying/reporting, automatic generation of notifications capabilities*
- o Secured and controlled access to student records for parents*

2. Current Status

MISIS can be considered from two perspectives. There is MISIS, the software application, and MISIS, the system. The MISIS software application doesn't, on its own, match the expectations of the MCD or even LAUSD's vision from 2002, because it does not contain all of the expected functions in a single application. Connected with other modules under the MISIS "umbrella" though, the system essentially functions as the integrated tool envisioned.

The MISIS system is imperfect. There will be continuing work to update, maintain and enhance the system for years to come, and LAUSD must plan for that. It is, for the most part, though, complete. The District is able to enroll students, assign them to classes and services, track attendance, record marks, generate reports, communicate with parents, manage disciplinary issues, etc.

There are some peripheral functions that stand out for their current and potential value:

- Enterprise Reporting – The District's integration of many student-related modules is most evident at the data level in the enterprise reporting environment (Focus). Dashboards have been created in many subject areas that allows both quick views into key performance indicators, but also the ability to drill down to detailed source data for further analysis. The value of this data integration is further demonstrated with a Comprehensive Student History Report that is available in the MyData component (soon to be replaced within Focus). This report contains demographic, enrollment, assessment, EL, discipline, marks, and transcript information. The tools employed also provide for ad hoc analysis and report creation by end users that is very advanced. Access to appropriate data analytics present a tremendous strategic opportunity for LAUSD, if they make the effort to use these powerful tools.
- MISIS Gradebook (using the Schoology software) – This tool, if fully embraced and utilized, will enhance transparency for parents and students into the day-to-day academic obligations and progress for every class. It is up to LAUSD teachers to commit to the practices that will most benefit students. New functions for Elementary teachers are excellent, and have a positive impact on workflow for them.
- Data Quality and Integrity tool (Certify application) – Benefits realized from the Certify tool integration with MISIS are evident in much improved completeness and accuracy of student records. A big advantage of this tool is that it distributes the responsibility for completing or repairing data right back to the schools or offices who created it, rather than relying on a central office to coordinate or even do the work.
- Parent Portal – Access for parents and guardians to student information in a timely way creates an opportunity for greater family involvement in the education process. LAUSD has implemented a broadly informative portal for parents and students, alike. It contains views to student's attendance, grades and assignments, progress toward graduation, progress for English Learners, student IEPs and services, and other tools as well. This has the potential to be even more beneficial if all LAUSD teachers commit to using the MISIS Gradebook, which immediately forwards assignments and other academic

obligations set up by teachers into the Parent Portal. For those schools in which teachers have made that commitment, students and parents are able to be more engaged in classroom and school activities.

2.1 Open Items

There are a number of items for which the work is underway or planned, but not yet completed. There are also a few areas that will present ongoing challenges that the District will need to pay close attention to. They are as follows:

1. Gradebook Rollout – Several mandate deadlines for all LAUSD teachers to use the MISIS Gradebook have come and gone, without the rollout being completed. In the case of Elementary teachers, technical work on the product was only recently completed, but pilot rollouts have been highly successful. All necessary software development to meet this mandate is done.
2. Charter Schools Data Acquisition – Phase 1 of this initiative was completed for all charter schools, and student enrollment data now resides in MISIS. For Phase 2, which comprises all other student data beyond enrollment data, there are five subject areas for which APIs must be developed. Three of the five subject area APIs have been developed for the PowerSchool, Illuminate, and Aeries student information systems. These three systems account for more than 95% of LAUSD's charter schools (240 of 250 campuses/schools). The three subject area APIs are being piloted now with three charter schools.
3. Household/Family Data – It is difficult in MISIS to connect siblings to each other, and there are implied connections (e.g. in the enrollment process) that don't really make a difference. There are two related projects underway that will resolve this problem, and enable workflow efficiencies, reporting enhancements, mailings clarity, and other valuable benefits. The projects are the Household Hub and Address Standardization.
4. Workflow – Attention to workflow analysis and business process engineering opportunities was diminished in the software development phases due to timeline pressures to get basic functionality in place. Some ongoing efforts will provide enhancements to MISIS workflow. The most important of those will occur when enrollment enhancements are implemented, coupled with replacement to LAUSD's enrollment forms. The Household Hub project will also improve workflow for LAUSD staff who work on SARB processes, as connected family members in the same household can then be automatically populated in the SARB records, eliminating a lot of searching, navigation, and data input.
5. Enrollment Enhancements – While the enrollment functions in MISIS satisfy basic requirements for the system, they are inefficient adaptations of software that came from another school district. The screens do not conform to LAUSD forms, workflow isn't adequate, and there are some bad navigation features (e.g. entering emergency

- contacts requires leaving the enrollment screens, searching for the student, and then inserting the emergency contact information).
6. Adult ID assignment and transcript info in MISIS – Not all adult education students are assigned a District ID, and not all transcript data is updated into MISIS, unless the student is simultaneously enrolled in a regular District school. The current Adult Ed student information system is going to be replaced, at which time these issues are anticipated to be resolved.
 7. LAUSD Commitment and Financial Planning – As has been previously expressed, when LAUSD elected to abandon the SchoolMax platform and embark on the development of MISIS, LAUSD effectively became the software company. While ITD has done a good job incorporating commercial packages into the MISIS “system”, thereby reducing the technology footprint of MISIS, it is still a complex, large system that requires ongoing commitment for maintenance and enhancement. Available funding in the coming years is, understandably, substantially reduced from previous years, but the commitment must still be made.
 8. Ongoing Training and Support challenges – The MISIS training team employs multiple means for training users of the systems, including instructor led training sessions, train-the-trainer models (TTT) in which school personnel may be required to train the users in their schools after being trained themselves, distribution of very detailed guides, and in some cases, CBT as well. There will always be challenges in an entity as large as LAUSD to satisfy all users, but they are at least making reasonable attempts to meet the needs. There is some doubt as to the effectiveness of TTT for the Gradebook rollout, as teachers may be trained as to the mechanics of the software without understanding the necessity for clear communication with parents and students. There are also challenges pertaining to getting parents to participate in the Parent Portal, because it is not always possible for school personnel to provide the support. In both cases, the centralized teams continue to pursue the most effective and affordable methods.

2.2 Planning

1. Gradebook Rollout – The MISIS Gradebook is now available for use by all Secondary teachers, and attempts have been made to encourage their utilization of the tool. At the end of the 2018-19 school year, it should be possible to turn off direct access to MISIS grade entry screens for secondary teachers, thus requiring them to use the Gradebook module. It is unfortunate that some teachers still choose only to enter marks into the Gradebook module, instead of creating the virtual gradebook with assignments, tests, etc. available to calculate marks for students. Peer pressure and pressures from parents for access to student assignments will, over time, influence this behavior. For Elementary teachers, the initial 40-school pilot was recently expanded to 140 schools, and grade pass-back into MISIS is being tested as well. Those participating in the pilot are enthusiastic, and full rollout is anticipated for the 2019-20 school year.
2. Charter Schools Data Acquisition – Phase 2 subject area APIs software development will be completed by June, 2019 (for the 3 major SISs). Additional API development

- will still be required for the 10 schools using other systems. There is also maintenance or conversion work to be done for new schools or some schools who were already using the Phase 1 APIs, but have changed SISs. The larger planning barrier is the finalization of Phase 2 Data Use Agreements (DUAs), which is still in the hands of the Office of General Counsel. If the OGC does not make this a priority, this will likely delay the initiative, as once the DUA is completed by LAUSD, charter schools will still need to sign the agreements.
3. Household/Family Data – The Household Hub and Address Standardization projects are both on target for implementation by July, 2019. I have seen a demonstration of the Household Hub, which will be available as a new MISIS module and launched from within MISIS. It is nearly ready for production as of February, 2019, so there is little doubt that the expected timeline will be met.
 4. Workflow – There is no specific initiative planned to generally address workflows in MISIS, although the Household Hub and Enrollment Enhancements will each have a positive impact on workflows. The current MISIS management team is attuned to the need for workflow analysis in all future MISIS software development efforts.
 5. Enrollment Enhancements – The schedule for enhancements to the enrollment features of MISIS are currently scheduled for the end of 2019-20 school year, but will be dependent upon finalization to new enrollment forms. These enhancements are anticipated to improve workflow in the enrollment process and, at a minimum, will align MISIS screens and data entry with the flow of information available in the enrollment forms.
 6. Adult ID assignment and transcript info in MISIS – Implementation of the new Adult Ed SIS (DACESIS) is underway, and scheduled to be completed by July, 2019.
 9. LAUSD Commitment and Financial Planning – We have repeatedly asked for a financial plan for ongoing support of MISIS, but have not received one. My understanding is that \$10 million will be allocated from general funds for the next 2 years. Without a breakdown of what the allocation covers, it isn't possible to determine the extent to which the District is committed to the MISIS System, including all of its components. My further understanding is that any business owner who wishes to have specific enhancements made to MISIS must be willing to provide funding for the required resources to make those enhancements. I have not seen a formal policy document that describes this circumstance. Beneath is the language I received from MISIS PM, which is useful but does not represent a financial plan, and does not indicate the span of applications covered in the allocated amount, and whether it is the MISIS Core Application or MISIS System (MISIS Core only? Welligent? Parent Portal? Charter Initiative? Schoology? Hardware? Cloud services? Enterprise reporting?):

Budgetary Support

MiSiS system stability continues to improve and the number of production bugs continues to decrease. \$10.2 M in general fund have been allocated for this year and subsequent years. MiSiS leadership continues to develop more cost effective ways to support our users. In order to reduce overall support costs, the District is: (1) using managed service providers to reduce overall labor costs; (2)

improving code maintainability; and (3) improving performance to reduce hardware needs. The initial steps are taking place to move MiSiS to our Van Nuys data center and ultimately to the cloud. MiSiS has also established a business governance process to allow users to prioritize and approve MiSiS enhancements.

7. Ongoing Training and Support challenges – I requested additional information from ITD to clarify their ongoing approach to training and support. Appendix D is what I received.

3. Conclusion and Recommendations

3.1 Conclusion

With the exception of the items described in Sections 2.1 and 2.2 of this report, only a handful of the 539 items in the MISIS Requirements Checklist remain. As of this writing, only 11 items remain, 9 of which are accounted for in projects underway.

While the MISIS System is not entirely what was expected in the 2002 vision statements, it is essentially done. The system architecture diagram in Appendix C depicts a large number of connections to the core system, similar to what existed in legacy systems at the beginning of this initiative. The difference not obvious is that the application(s) are centralized rather than distributed, and data ultimately reside in a single repository.

LAUSD's Enterprise Reporting environment and tools are exceptionally well done, and provide insights into student attributes and performance that the District has never had previously. None of that would have been possible without the work that has gone into the MISIS System.

To summarize, the District has effectively met the primary requirements for MiSiS and it can be deemed a functional and stable student information system. Several items remain outstanding and are scheduled to be finalized by the end of this calendar year.

One of the main requirements not met, is the integration of independent charter schools (See Section 2.2, item #2 above). Although a requirement, this is a complicated issue more indicative of political and organizational will than the technical aspect of MiSiS.

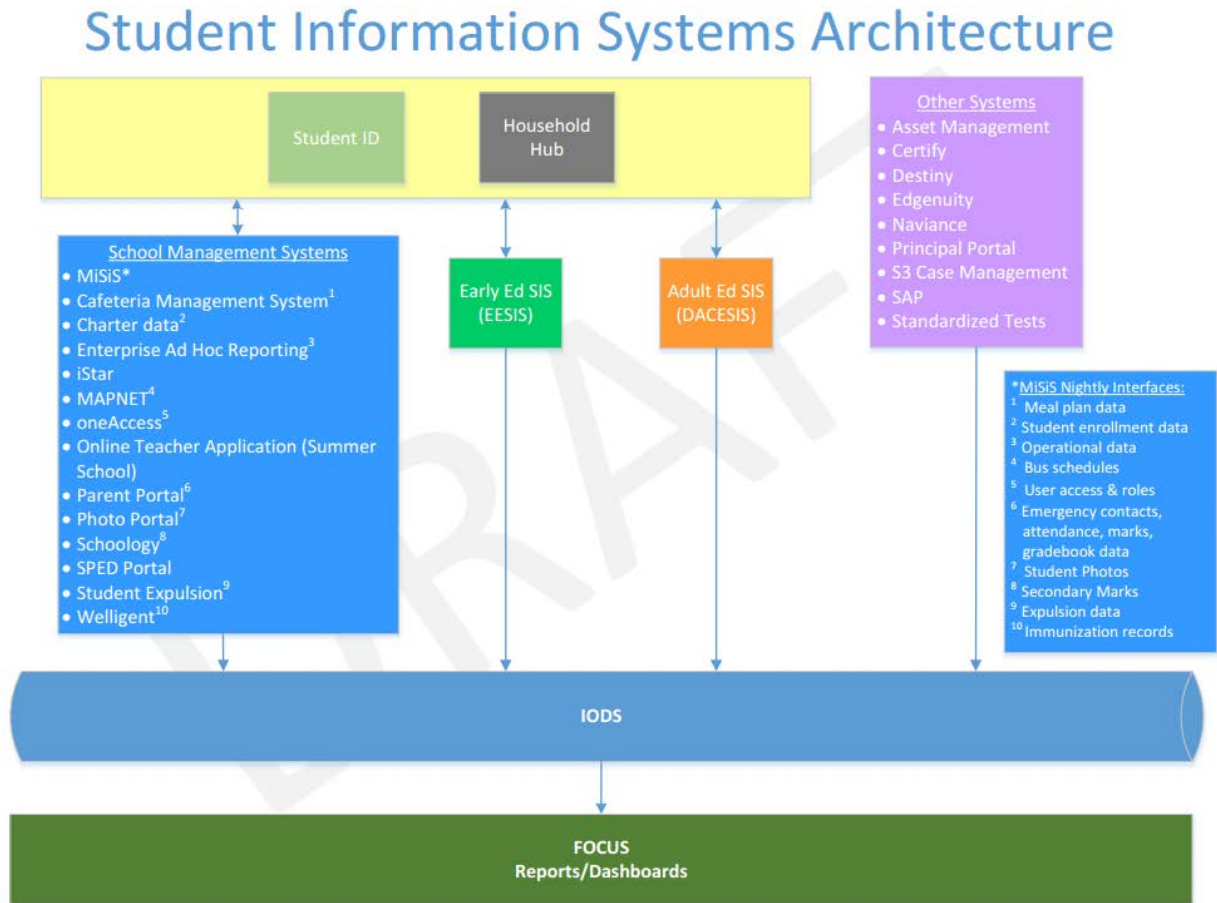
The District is commended for the successful completion of MiSiS. Despite many challenges, the current MiSiS team and leadership has demonstrated persistent commitment to the development and completion of the program.

3.2 Recommendations

Recommendation 1 – Require written confirmation from LAUSD on status or completion of each of the items described in Section 2.2 above in July, 2019 and if necessary, again in December, 2019.

Recommendation 2 – Given the current status of MISIS, no other monitoring is necessary. I recommend that once the confirmations above are received, this MCD requirement be deemed satisfied.

Appendix A – System Architecture Diagram



Appendix B – ISIS Checklist

ISIS Checklist
High-level Objectives and Business Processes to be Supported

The following tables represents a recommended new ISIS Checklist. The first table is intended to convey, at a higher level, the intent of the MCD as described by the Consultants' Report and the RFP objectives. The second contains a list of the major and minor business processes/items from the RFP's Functional Requirements Appendix that must be satisfied in some manner either by ISIS, or by an interace from ISIS to an external system. Finally, the graphic depiction represents a visual of how the various pieces of ISIS should work together when finished.

Item	Description of Objective	Qualification of Objective	ISIS Component that Enables or Will Enable Objective	Status
From the Consultants' Report				
1	Centralized computerization of all student records	An integrated database/system to store all relevant student demographic and educational data, including an electronic cumulative record, and which integrates with or otherwise provides a special education management information system.		
2	Developing and installing a comprehensive special education management information system	Implementing a system that integrates all student demographic, educational and special education data, and provides specific functionality designed to ensure actively monitored compliance with special education timelines and other relevant laws and regulations regarding students with special education needs. This system will enable management of the entire Special Education student life span, from referrals to assessments, eligibility determination, IEPs, placements, service prescription, service provision, and any other relevant processes. It will provide easy access to management information, and targeted alerts and notifications that enable appropriate management intervention.		
From the Request for Proposals				
	Vision:	An Integrated Student/School Information System (ISIS) as a centralized repository of student and school information that will ensure the needs of all of its pre-school to adult students are met in the most efficient and comprehensive manner, regardless of school-type, grade-level, and whether the student is a general education student or a special education student.		
3	A solution or a set of solutions that are fully-integrated, and are built using mainstream technologies on an open architecture that is portable and scalable	Either a single, integrated system that provides all necessary functions, or multiple systems that integrate at the data level and reporting level		
4	One centralized system for all students (i.e. infants to adulthood in both general education and special education)	An integrated view to every student's cumulative record throughout their LAUSD "career."		
5	A single repository with no data redundancy (i.e. Capture data once at the point of origin)	Database integration and only one point of entry for each data item relating to a student (could be different entry modules/systems, depending upon their age).		

ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Description of Objective	Qualification of Objective	ISIS Component that Enables or Will Enable Objective	Status
6	Open, secured access for all authorized users	Immediate access to up-to-date data for either view or update is available to every person who needs such access to perform the responsibilities of their LAUSD role(s). Access to information is required at both the district (Local, and Central), and individual school level. It is typically at the individual schools where data are first gathered and processed such as enrollment, attendance, marks, contact information, etc. The information accessed at the District level is used primarily for administrative and management-control purposes, however, compliance and monitoring reports are also requirements.		
7	User-friendly, browser-based graphical user interfaces with workflow features that simplify and streamline data entry	System should not be dependent upon a specific workstation platform		
8	Built-in precautionary alerts to trap exception conditions before they become problems	System edits to prevent entry of inappropriate data values. Also, system-generated messages to notify appropriate users of certain data conditions (e.g. IEP timeline requirements)		
9	Flexible querying/reporting, automatic generation of notifications capabilities	Comprehensive reporting capabilities, including all mandated external reports, standard sets of parameter-driven reports from each module, and ad hoc capabilities for authorized users to create their own reports as required. Also, system-generated messages to notify appropriate users of certain data conditions (e.g. attendance not entered)		
10	Secured and controlled access to student records for parents	Information available online to authorized parents/guardians regarding student enrollment, attendance, grades, graduation requirements, discipline events, etc.		
Business Process Categories:		Enable all of the major and minor business processes associated with each category as further refined during the course of the project by District Subject Matter Experts.		

ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Business Process Area/Category	Major Subordinate items or Processes	ISIS Component that Enables or Will Enable Objective	Status
1	Area: Student Enrollment	Collect/Enter/Update Student Information		
2		Collect and Manage Special Program Information		
3		Validate Student Information		
4		Assign Schools		
5		Assign Homeroom/Record Room		
6		Assign Counselor		
7		Matriculation Eligibility and Management		
8		Year-end processes: Continuing or Leaving Students		
9		Year-end processes: Matriculating Students		
10		Form Completion/Updates/Notification		
11		Create Enrollment Reports		
12	Area: Scheduling/Class Registration	Create/Update School Calendar		
13		Create/Update Master Schedule		
14		Enter/Update Course Request Information		
15		Assign Students to Classes		
16		Edit/Balance Classes		
17		Generate Reports		
18		Prepare Summer/Intersession Schedule		
19		Set Standard Attendance Configuration		
20		Assign Teachers and Aides to Classes		
21		Intersession/ESY/Summer Sessions Edits		
22		Matriculation Dates Configuration		
23	Interface to External Scheduling System (e.g. Columbia)			
24	Area: Attendance	Set Attendance Configuration		
25		Generate Attendance-related Forms and Documents		
26		Input/Update/Access Attendance Information		
27		Generate Attendance Reports and Notifications		
28		Capture Student Information for Extracurricular Activities		

ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Business Process Area/Category	Major Subordinate items or Processes	ISIS Component that Enables or Will Enable Objective	Status
29	Area: Mark Reporting	Input/Update Student Marks		
30		Verify Student Marks		
31		Generate Progress Reports/Report Cards		
32		Update Student Cumulative Folder		
33		Student Information Tracking and Analysis (Intervention participation, student rankings, course type/program versus achievement, etc.)		
34		Data Analysis and Reporting		
35		Area: Transcripts	Student Information Tracking and Analysis (e.g. entering contract credits)	
36	Calculate multiple GPA types			
37	Generate and Send Transcripts by Type			
38	Maintain Student Cumulative Folder			
39	Track and Maintain Graduation Requirements			
40	Area: Testing	Preparation for Tests		
41		Determine Students' EL Level		
42		Administration of Online Testing		
43		Collect/Enter/Update Student Test Data		
44		Capture Performance Levels Configuration		
45		Evaluate Test Results		
46		Notification to Parents		
47		Generate Testing Reports		
	Area: Counseling	Major Process: Academic Interventions / Counseling		
48		Intervention Program Identification and Selection		
49		Language Proficiency		
50		Assist Students with Academic Planning		
51		Capture Intervention Program Data		
52		Evaluation of Intervention Programs		
53		Generate Academic Intervention Reports		
54		Students Not Currently Enrolled		
		Major Process: Counseling / Personal Interventions		
55		Students with Special Needs (e.g. SST, 504, EL, Gifted, Migrant, programs)		
56		Capture Counseling Data Elements		
57		Compliance Management		
58		Generate Counseling Reports		
59		Needs Assessment (for testing)		
60		Referral and Service Coordination		

ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Business Process Area/Category	Major Subordinate items or Processes	ISIS Component that Enables or Will Enable Objective	Status	
61		SST Assessment and Follow-up			
62		Students Transitioning to Alternative Schools			
63		Support for AEWC Students			
64		Work Experience Information Capture			
		Major Process: Discipline/Counseling			
65		Capture Student Behavior and Discipline Information			
66		Early Education Suspension/Expulsion Alert			
67		Online Access to Student Behavior Information			
68		Special Education Discipline Activities			
		Major Process: Out-of-School Extracurricular, Co-curricular, Pre-School, After School			
69		Application for Extracurricular Activities			
70		Approvals for Extracurricular Activities			
	Area: Health	Capture Student Participation Information for Extracurricular Activities			
71		Support Services for Extracurricular Activities			
73		Capture Student Information for Health Activities			
74		Health Integration Points Processes			
		Health Recordkeeping (office visits, checklists, communication with parents, etc.)			
75		Ongoing Health Data Support Activities (including automatic notification to Special Ed Coordinator)			
76		Provide Health Exams / Immunizations			
77					
		Area: Special Education	Major Process: Referrals		
			Record Requests and Referrals		Yes
78			Review Prior History		Yes
79	Determine Assessment Needs			Yes	
80	Major Process: Assessments				
	Develop and Record Special Education Assessment Plan				
81	Notify Service Providers				
82	Conduct Assessments and Prepare Assessment Reports			Yes	
83	Major Process: Individualized Education Program (IEP)				
	Identify IEP Participants				
84	Schedule IEP Meeting and Notify IEP Participants				
85	Conduct IEP Meeting and Record Results				
86	Transition Planning				
87	Parents/Community Advisory Committee information				
88	Major Process: Placements				
	Place Students for Services				
89	Assign Trainees/Assistants (classroom aides)				
90	Assign DIS Service Providers				
91	Make Transportation Arrangements				
92	Major Process: Services Provision and Service Data Collection				
	Monitor Service Delivery and Student's Progress				
93	Least Restrictive Environment: Collaborative Models				
94	Collect Service Data				
95					

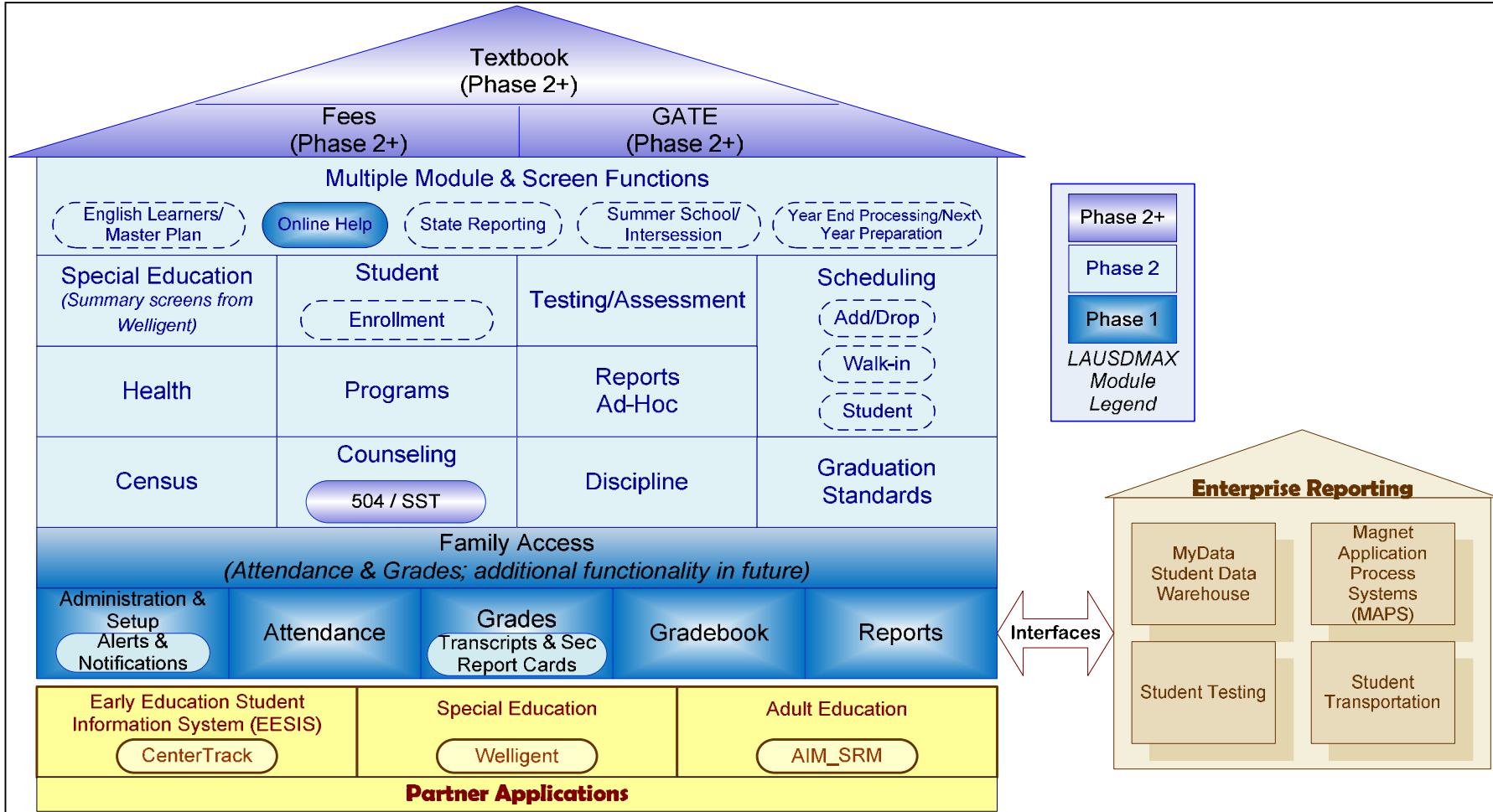
ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Business Process Area/Category	Major Subordinate items or Processes	ISIS Component that Enables or Will Enable Objective	Status
96		Prepare Service Data for Medi-Cal Billing		
		Major Process: Billing		
97		Establish/Confirm Medi-Cal Eligibility		
98		Bill California DHS for Medi-Cal Reimbursements		
		Major Process: Due Process		
99		Record Due Process Requests and Resolve Issues		
		Record Due Process Results; Notify School for Implementation or Resolve Issues		
100				
101		Follow-up with School for Confirmation of Implementation		
		Major Process: Reimbursements		
102		Record Reimbursement Requests and Payment Authority		
103		Notify Accounts Payable for Payments or Resolve Issues		
		Major Process: Service Management		
104		Manage Special Education Classes and Class Norms		
105		Manage Service Provider's Caseloads (DIS)		
106		Manage NPS/NPA Contracts/ISAs		
107		Track NPS/NPA Providers' Credentials		
108		Process NPS/NPA Invoices		
		Major Process: Compliance Management		
109		Monitor Timelines for Compliance		
110		Monitor Services Delivery for Compliance		
111		Track Supporting Documents, Including Contracts		
112		District Review Processes		
		Major Process: Reporting		
		Various reports required (including state mandated, coordinated compliance review, Principal's and Superintendent's reports, District Validation Review, etc.)		
113				
		Major Process: Manage 504 Plan		
114		Requests for Accommodations		
115	Evaluations / Meetings			
116	504 Plan Generation			
	Area: School Management and Related Services			
117	(NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an external enabling system. It is not expected that ISIS will contain modules to cover all of these processes.)	Annual Program Survey		
118		Financial Planning		
119		Manage Equipment		
120		Manage School Cafeteria		
121		Manage School Libraries		
122		Manage Schools		
123		Manage Teachers		
124		Manage Textbooks		
125		Master Plan Program Survey		
126		Planning and Demographics		
127		Title 1 Programs		
128		Capture Transportation Data for Interface		
		Major Process: Security		
129	Role-based Access to Screens/Forms/Data			
130	Ability to lock out data changes			
		Major Process: Interfaces		

ISIS Checklist
High-level Objectives and Business Processes to be Supported

Item	Business Process Area/Category	Major Subordinate items or Processes	ISIS Component that Enables or Will Enable Objective	Status
131	Area: General	Multiple electronic data interfaces to internal systems (SST, DSS, HR and Finance systems) and external entities (e.g. CSIS, CA DHS, LA County DMH)		
		Major Process: Reports		
132		Multi-lingual Capabilities		
133		Report Delivery Employing Multiple Media		
134		Ad-hoc Reporting		
135		Comparative and Longitudinal Reporting		
		Major Process: Other Modules		
136		Parents Module		
137		Complaints Management Module		
138		Workflow		
139		Contacts Management Module		

ISIS Checklist
High-level Objectives and Business Processes to be Supported



Appendix C – MISIS Requirements Checklist

MISIS REQUIREMENT					FEBRUARY 2017			
Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
1	Area: Student Enrollment	x	E1, E2, E3, E9, E14, I3	Collect/Enter/Update Student Information	Complete	Elizabeth Louros		BN
1			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (In Production)	Elizabeth Louros	Clumsy navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this: Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
1			E14	E14- Maintain emergency contact information	Complete/Fully Functional (In Production)	Elizabeth Louros	This is very clumsy. Adding parent/guardian doesn't explicitly identify Emergency Contact. No menu or other navigation option explicitly shows a way to add/edit Emergency Contact info. You cannot continue to add a Contact (which is where you indicate emergency contact info) as part of the enrollment process. You must search for the student again, and then navigate to "Contact Information" under the Enrollment menu for that student. This will be included in the "UX" revisions, which are in planning phase now (3/6/2017). Update 20180405: Also, indicating "gifted" has no impact. Same for "twin", and if you add an additional family member it does not propagate to that student's record. Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
1			E2	E2 - Enter initial student enrollment information - students live in Zone of Choice/option area	Complete/Fully Functional (In Production)	Elizabeth Louros	Most of the Zone of Choice student enrollment records come as part of the NVE process and the interface to the MAPS system. The process is similar for Option Area schools, and is properly driven by the address.	BN
1			E3	E3 - Enter initial student enrollment information - students with permits	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
1			E9	E9 - Withdraw students for all types of reasons	Complete/Fully Functional (In Production)	Elizabeth Louros	Sketch 38 (scheduled for 12/13) will improve selection of withdrawal reasons.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
1			I3	I3 - Provide IDs to various applications	Complete/Fully Functional (In Production)	Robert Pelayo	The District Student ID System is the one place where students receive their unique identified, or student ID number. Not all adult students receive a District ID. Update 20180411: In the Household Hub initiative, this function will be modified so that every student gets the District ID. Update 20190215: Per MISIS PM, The Student ID system will issue District IDs to all Adult School students with the implementation of DACESIS. ETA of July 2019.	
2			E12a	E12a - Identify and monitor English Learner Language Classification	Complete/Fully Functional (In Production)	Marie Reyes	Established and entered by EL Coordinator (unofficially), but then confirmed by CELDT (received in Interface from testing vendor).	BN
2			E12b	E12b - Reclassify students and document parent notifications	Complete/Fully Functional (In Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
2			E12c	E12c - Record English Language Development Level	Complete/Fully Functional (In Production)	Marie Reyes	Based upon the CELDT overall score. Loaded from interface, not entered manually.	BN
2			E12d	E12d - Record Program Placement and parent notification dates	Complete/Fully Functional (In Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
2			E12e	E12e - Record Parental Exception Waiver request	Complete/Fully Functional (In Production)	Marie Reyes	Pending enhancement to prevent entering a waiver request for anything other than LEP.	BN
2			E12f	E12f - Record information for Language Appraisal Team meetings.	Complete/Fully Functional (In Production)	Luz Marquez	Functionality exists, but will be replaced, pending Sketches S12, S18, and S31. Development completed, but release date not yet established.	BN
2			E12g	E12g - RFEF Monitoring	Complete/Fully Functional (In Production)	Marie Reyes	Function exists to capture dates, but will be removed, because EL coordinators are not using it. The RFEF Monitoring Roster and letter are used annually, however.	BN
2			E12h	E12h - Record Diagnostic Placement Inventory.	Complete/Fully Functional (In Production)	Marie Reyes	This is now an optional test for 5th and 6th grade students. There is some kind of data issue, though, because many historical records appear in an ad hoc analysis that are not viewable in MISIS. There is a setup in MISIS to record these results. Marie is following up, however, on why DPI scores from the past are not showing up in Test History screen. Bug report submitted and resolved.	BN
2			E12i	E12i - Generate reports to monitor English Learners and provide notification to parents.	Complete/Fully Functional (In Production)	Marie Reyes	Entering the notification dates for letters going to parents is done via Admin-Mass Notification Date Entry, not one student at a time. This is a separate process from generating the notification letters, because they have to record whether it is attempt 1, 2, or 3.	BN
2			E3	E3 - Enter initial student enrollment information - students with permits	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
2	Area: Student Enrollment	x	E3, E8, E12, E12a-i	Collect and Manage Special Program Information	E3 Partially Complete			BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
2			E8	E8 - Review GATE students	Partially Complete/Partially Functional (In Production)	Elizabeth Louros	Process and system questions. I may need some additional training about this. No functions in MISIS for this purpose, other than a question as to whether or not the student was in a gifted program at a previous school. An alert to the GATE Coordinator would satisfy this need. Update 20190213: It may be possible to somehow utilize the MISIS Announcement feature to direct an alert to an individual, but absent that, the notification is only done manually, or available if a GATE Coordinator chooses to run a report (a passive notification).	BN
3	Area: Student Enrollment	x	E1	Validate Student Information	Complete			BN
3			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (In Production)	Elizabeth Louros	Clumsy navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this: Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
4	Area: Student Enrollment	x	E1, E10, E11	Assign Schools	Complete			BN
4			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (In Production)	Elizabeth Louros	Clumsy navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this: Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
4			E10	E10 - Identify schools for next year and initiate NVE	Complete/Fully Functional (In Production)	Elizabeth Louros	Identified by interface from LOCNX. Input is coming from MPD. School Operations. Local Districts pertaining to which schools will be open, with what boundaries, with what grade levels, dual language schools, etc. This is a potentially high-risk process, and timing of preparation leads to significant data cleanup once NVE enrollment records are created. The catalyst for a new module will be the Unified Enrollment process. This will have impact across programs and schools, including the schedule by which the timeline must begin. In the interim, this process will remain (2-3 years)	BN
4			E11	E11 - Identify summer school locations and initiate summer school process	Complete/Fully Functional (In Production)	Elizabeth Louros	InfoSys is currently writing specs for a new admin screen for summer school (12/14/16)	BN
5	Area: Student Enrollment	x	S35	Assign Homeroom/Record Room	Complete			BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
5			S35	S35 - Assign homeroom/record room	Complete/Fully Functional (In Production)	Mary Lu Camacho	School Users are able to assign a homeroom to a student	BN
6	Area: Student Enrollment	x	E21, S36	Assign Counselor	Complete			BN
6			E21	E21 - Assign counselor to individual student	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users assign students to a counselor by using the Groups function	BN
6			S36	S36- Assign counselor by house (group)	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users assign students to a learning community by using the Groups function	BN
7	Area: Student Enrollment	x	E10, NV1	Matriculation Eligibility and Management	Complete	Elizabeth Louros		BN
7			E10	E10 - Identify schools for next year and initiate NYE	Complete/Fully Functional (In Production)	Elizabeth Louros	Identified by interface from LOCNX. Input is coming from MPD, School Operations, Local Districts pertaining to which schools will be open, with what boundaries, with what grade levels, dual-language schools, etc. This is a potentially high-risk process, and timing of preparation leads to significant data cleanup once NYE enrollment records are created. The catalyst for a new module will be the Unified Enrollment process. This will have impact across programs and schools, including the schedule by which the timeline must begin. In the interim, this process will remain (2-3 years)	BN
7			NV1	NV1 - generate next year enrollment records in mass	Complete/Fully Functional (In Production)	Elizabeth Louros	There are some issues regarding running NYE after 6/30. The conflict is with the auto-withdrawal process that may commence as of 7/1 each year.	BN
8	Area: Student Enrollment	x	Y1	Year-end processes: Continuing or Leaving Students	Complete			BN
8			Y1	Y1 - Close the year	Complete/Fully Functional (In Production)	Elizabeth Louros	The District and school calendars govern end of the school year, and then some data are cleaned up with a script (e.g. students who should have matriculated but didn't have an assigned school). The next Year Enrollment error report gives school personnel detailed data about matriculating students for whom there is no next school identified. Instructions are for schools to run this report every day. The team will also add a rule to Certify to help with this. Robert will update year-end checklist to guide use of Certify numbers by Local Districts, etc. Once this is completed, this item will be done. Updated as of 6/14/17. Update 6/15/17 - Documentation provided in the checklist.	BN
9	Area: Student Enrollment	x	Y1	Year-end processes: Matriculating Students	Complete			BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
9			Y1	Y1 - Close the year	Complete/Fully Functional (in Production)	Elizabeth Louros	The District and school calendars govern end of the school year, and then some data are cleaned up with a script (e.g. students who should have matriculated but didn't have an assigned school). The next Year Enrollment error report gives school personnel detailed data about matriculating students for whom there is no next school identified. Instructions are for schools to run this report every day. The team will also add a rule to Certify to help with this. Robert will update year-end checklist to guide use of Certify numbers by Local Districts, etc. Once this is completed, this item will be done. Updated as of 6/14/17. Update 6/15/17 - Documentation provided in the checklist.	BN
10			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (in Production)	Elizabeth Louros	Clumsy navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this. Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
				Promotion and/or retention activity			For elementary students, the retention process applies. For secondary students, promotion is automatic, without earned-credits validation. This is illogical and likely leads to unnecessary data reconciliation for students who should not have been promoted. What is the official district policy for promoting secondary students?	BN
10			E10	E10 - Identify schools for next year and initiate NVE	Complete/Fully Functional (in Production)	Elizabeth Louros	Identified by interface from LOCNX. Input is coming from MPD, School Operations, Local Districts pertaining to which schools will be open, with what boundaries, with what grade levels, dual-language schools, etc. This is a potentially high-risk process, and timing of preparation leads to significant data cleanup once NVE enrollment records are created. The catalyst for a new module will be the Unified Enrollment process. This will have impact across programs and schools, including the schedule by which the timeline must begin. In the interim, this process will remain (2-3 years)	BN
10			E11	E11 - Identify summer school locations and initiate summer school process	Complete/Fully Functional (in Production)	Elizabeth Louros	Infosys is currently writing specs for a new admin screen for summer school (12/14/16)	BN
10			E12	E12 - Identify and monitor English Learners (and see P9 for another EL requirement)	Complete/Fully Functional (in Production)	Marie Reyes		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
10			E12A	E12a - Identify and monitor English Learner Language Classification	Complete/Fully Functional (in Production)	Marie Reyes	Established and entered by EL Coordinator (unofficially), but then confirmed by CELDT (received in interface from testing vendor).	BN
10			E12B	E12b - Reclassify students and document parent notifications	Complete/Fully Functional (in Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
10			E12C	E12c - Record English Language Development Level	Complete/Fully Functional (in Production)	Marie Reyes	Based upon the CELDT overall score. Loaded from interface, not entered manually.	BN
10			D12D	E12d - Record Program Placement and parent notification dates	Complete/Fully Functional (in Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
10			E12E	E12e - Record Parental Exception Waiver request	Complete/Fully Functional (in Production)	Marie Reyes	Pending enhancement to prevent entering a waiver request for anything other than LEP.	BN
10			E12F	E12f - Record information for Language Appraisal Team meetings.	Complete/Fully Functional (in Production)	Luz Marquez	Functionality exists, but will be replaced, pending Sketches S12, S18, and S31. Development completed, but release date not yet established.	BN
10			E12G	E12g - RFEF Monitoring	Complete/Fully Functional (in Production)	Marie Reyes	Function exists to capture dates, but will be removed, because EL coordinators are not using it. The RFEF Monitoring Roster and letter are used annually, however.	BN
10			E12H	E12h - Record Diagnostic Placement Inventory.	Complete/Fully Functional (in Production)	Marie Reyes	This is now an optional test for 5th and 6th grade students. There is some kind of data issue, though, because many historical records appear in an ad hoc analysis that are not viewable in MISIS. There is a setup in MISIS to record these results: Marie is following up, however, on why DPI scores from the past are not showing up in Test History screen. Bug report submitted and resolved.	BN
10			E12I	E12i - Generate reports to monitor English Learners and provide notification to parents.	Complete/Fully Functional (in Production)	Marie Reyes	Entering the notification dates for letters going to parents is done via Admin-Mass Notification Date Entry, not one student at a time. This is a separate process from generating the notification letters, because they have to record whether it is attempt 1, 2, or 3.	BN
10			E13	E13 - Record student record requests	Complete/Fully Functional (in Production)	Elizabeth Louros	Sketch 38 (scheduled for 12/13) will combine records request and transcripts request screens.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
10			E14	E14- Maintain emergency contact information	Complete/Fully Functional (In Production)	Elizabeth Louros	This is very clumsy. Adding parent/guardian doesn't explicitly identify Emergency Contact. No menu or other navigation option explicitly shows a way to add/edit Emergency Contact info. You cannot continue to add a Contact (which is where you indicate emergency contact info) as part of the enrollment process. You must search for the student again, and then navigate to "Contact Information" under the Enrollment menu for that student. This will be included in the "UX" revisions, which are in planning phase now (3/6/2017). Update 20180405: Also, indicating "gifted" has no impact. Same for "twin", and if you add an additional family member it does not propagate to that student's record. Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
10			E15	E15 - Enter school and district exclusions	Complete/Fully Functional (In Production)	Elizabeth Louros	Matches forms fairly closely.	BN
10			E17	E17 - Withdraw no-show students (same as No Show in Attendance module)	Complete/Fully Functional (In Production)	Elizabeth Louros	Changes to this process are scheduled that will allow mass entry of no-show students, adding an indicator to the teacher's roster, printing a no-show student's schedule, etc. In process 3/6/2017	BN
10			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
10			E2	E2 - Enter initial student enrollment information - students live in Zone of Choice/option area	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
10			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
10			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
10			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
10			E20C	E20c (District Ath. Director) - Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
10			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
10			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN
10			E20F	E20f - (School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
10			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN
10			E20H	E20h -(School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN
10			E20I	E20i - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez		BN
10			E20J	E20j - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Enhancement pending to rename "Remarks" page (Miscellaneous-Athletics-Remarks) to "Waiver." This is to override only those rules for which a waiver is available.	BN
10			E20K	E20k (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
10			E20L	E20l - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
10			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
10			E20N	E20n - (School Athletic Director)-to track return of required documents by students (mass or individually)	Complete/Fully Functional (In Production)	Luz Marquez	Capability is to enter this information individual by individual. District Athletic Director did not want to allow a mass update. Miscellaneous-Athletics-District required documents.	BN
10			E21	E21 - Assign counselor to individual student	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users assign students to a counselor by using the Groups function	BN
10			E22	E22 - Enroll currently non-enrolled students for CAHSEE preparation and administration (usually post 12th grade student)	Complete/Fully Functional (In Production)	Elizabeth Louros	This is no longer necessary, since CAHSEE is no longer administered. However, it would be possible to use Attendance Category (non-ADA) to achieve this.	BN
10			E23	E23 - Reorganization Report	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
10			E24	E24 - Determine Enrollment Counts on screen and via ad-hoc reporting	Complete/Fully Functional (In Production)	Elizabeth Louros	MISIS Dashboard reports account for this	BN
10			E26	E26 - Print student check-off sheets	Complete/Fully Functional (In Production)	Elizabeth Louros	Student checkout report, 5-column roster reports demoed by Elizabeth.	BN
10			E28	E28 - Generate miscellaneous reports for office use	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
10	Area: Student Enrollment	x	E1-E28	Form Completion/Updates/Notification	E18 Planned			BN
10			E18	E18 - Upload student photos	Planned	Raoul Chagoyan	Pending implementation late November, 2016. Vendors will all use the same portal, upload images into the portal, and then a script runs nightly to upload the images into MISIS. Photo portal is ready, but not all applications are picking up the photos yet. Robert Pelayo will fu on schedule for this. Update 6/8/18: Welligent implementation currently estimated for January, 2019. Update 20190212: Development done for Welligent. It will be in the production system 3/10/19.	BN
11	Area: Student Enrollment	x	E23 - E26, E28, TR6	Create Enrollment Reports	Complete			BN
11			E23	E23 - Reorganization Report	Complete/Fully Functional (In Production)	Elizabeth Louros	Part of scheduling module. Used by Elementary schools.	BN
11			E24	E24 - Determine Enrollment Counts on screen and via ad-hoc reporting	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
11			E26	E26 - Print student check-off sheets	Complete/Fully Functional (In Production)	Elizabeth Louros	Student clearance report satisfies this requirement.	BN
11			E28	E28 - Generate miscellaneous reports for office use	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
11			TR6	TR6 - Run pre-populated student transfer form (Enrollment/User Story 3351)	Complete/Fully Functional (In Production)	Elizabeth Louros	PAR has just been modified to contain needed Special Ed information. Policy is now to only print this report for students leaving LAUSD.	BN
12	Area: Scheduling/Cla ss Registration	x	S1, S2	Create/Update School Calendar	Complete			BN
12			S1	S1 - School configuration and calendar	Complete/Fully Functional (In Production)	Robert Pelayo		BN
12			S2	S2 - School Scheduling Parameters	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
13			S20	S20 - Prepare Master Schedule for Spring (same as S19)	Complete/Fully Functional (In Production)	Mary Lu Camacho	Auto-mapping rollover is under development, and will be available under Master Scheduling-Concurrent Term Editor.	BN
13			S38	S38 - Add new room/close room; Making them available/nonavailable in the master schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	Schools users use the Instructional Settings function to add/edit rooms	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
13			S39	S39 - Add paraprofessionals to the Master Schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users use the section attributes feature to add a paraprofessional to a section. It doesn't appear as if paraprofessionals can be assigned to individual students. It seems as if this is limited to assigning them to a class.	BN
13			S4	S4 - Review/edit course offerings	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users use the School's Courses function to review/edit course offerings	BN
13			S6	S6 - Creation of Initial Master schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	School User is able to create a master schedule using the Scenario Manager function	BN
13			S42	S42 - Assign Teachers to a House	Obsolete	Elizabeth Louros	This requirement was based on functionality in LAUSDMAX. In MISIS we do not use the term House. SLCs essentially function the same way as "house" used to in SchoolMAX, but they are managed using the Groups functions and scheduling features in MISIS, without having to build any unique new software to do so.	BN
13			S41	S41 - Ability to Upload and Download data	Partially Complete/Partially Functional (In Production)	Elizabeth Louros	The downloading of student is done using MISIS Ad Hoc reporting tool. Uploading is potentially a future enhancement that could be considered, but other than programmed interfaces, it is not part of the system's basic functionality.	BN
13	Area: Scheduling/Cla ss Registration	x	S4, S6, S20, S38, S39, S41, S42	Create/Update Master Schedule	S41 Partially Complete	Mary Lu Camacho		BN
14	Area: Scheduling/Cla ss Registration	x	S5	Enter/Update Course Request Information	Complete	Mary Lu Camacho		BN
14			S5	S5 - Initial input and review of course requests	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users able to enter student course requests in the Course Request screen and use multiple reports to review the requests.	BN
15	Area: Scheduling/Cla ss Registration	x	S3, S6, S8, S12, S13, S16, S17, S19, S32, S33	Assign Students to Classes	Complete	Mary Lu Camacho		BN
15			S12	S12 - Finalize student schedules and Master schedule (review of exception reports)	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
15			S13	S13 - Resolve conflicts and incomplete schedules	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
15			S16	S16 - Balance classes and adjust schedules (This should include P6 - Schedule program participants)	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
15			S17	S17 - Schedule walk in students	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
15			S19	S19 - Scheduling for spring semester (same as S20)	Complete/Fully Functional (In Production)	Mary Lu Camacho	There is a new "auto-mapping" function that will be in the live system as of 11/2/16. It will enable quick mapping of fall semester courses to Spring courses.	BN
15			S3	S3 - Analysis of Enrollment Projection	Complete/Fully Functional (In Production)	Elizabeth Lourous	Enrollment projection is done outside of MISIS by the Office of Data and Accountability and Budget Services based on past enrollment and future projections, but MISIS takes the projection data and provides reports to the parties that need it (i.e. the Superintendent).	BN
15			S32	S32 - Combination Courses	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
15			S33	S33 - Composite Courses	Complete/Fully Functional (In Production)	Mary Lu Camacho	Composite is an ISIS term and is no longer used in MISIS. However, this function is taken care of with combination and linked classes in MISIS.	BN
15			S6	S6 - Creation of Initial Master schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	School User is able to create a master schedule using the Scenario Manager function	BN
15			S8	S8 - Define rules for scheduling engine and Initial run.	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
16	Area: Scheduling/Class Registration	X	S9, S16	Edit/Balance Classes	Complete	Mary Lu Camacho		BN
16			S16	S14 - Print and distribute student schedules, class rosters	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
16			S9	S9 - Analysis of Reports	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
17		X	S9, S14	Generate Reports	Complete	Mary Lu Camacho		BN
17			S14	S14 - Print and distribute student schedules, class rosters	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
17			S9	S9 - Analysis of Reports	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
18		X	S34	Prepare Summer/Intersession Schedule	Complete	Mary Lu Camacho		BN
18			S34	S34 - Intersession/summer school application	Complete/Fully Functional (In Production)	Elizabeth Lourous	Report available that creates a letter to parents indicating courses student may be available to take in the summer school program.	BN
19		X	S2, AT20	Set Standard Attendance Configuration	Complete	Luz Marquez		BN
19			AT20	AT20- System Administration attendance configuration	Complete/Fully Functional (In Production)	Luz Marquez		BN
19			S2	S2 - School Scheduling Parameters	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
20		x	N1, N2, N7, S39, S42	Assign Teachers and Aides to Classes	Complete	Mary Lu Camacho		BN
20			N1	N1 - inbound interface from BASE (BTS)	Complete/Fully Functional (In Production)	Robert Pelayo	The assumption is that this is something coming from SAP, but nobody, Richard included, seems to know exactly what this means.	BN
20			N2	N2 - Staff information - Credentials Number of Years on site, Number of Years with the District, Differentials (Coordinator, Athletics, Supplemental), Coordinatorship (e.g., Title I)	Complete/Fully Functional (In Production)	Robert Pelayo	HR Megafire interface brings data into MISIS (via IODS), but there is no view of differential assignments. Update 20180406: There also does not seem to be any way to search for or find individuals assigned to specific roles (e.g. GATE Coordinator)	BN
20			N7	N7 - Run Assignment Monitoring report to check for Misassignments/NCLB	Complete/Fully Functional (In Production)	Richard Alvarez	NCLB is accommodated, but there is new legislation ESSA that may impose other requirements.	BN
20			S39	S39- Add paraprofessionals to the Master Schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	School users use the section attributes feature to add a paraprofessional to a section. It doesn't appear as if paraprofessionals can be assigned to individual students. It seems as if this is limited to assigning them to a class.	BN
20			S42	S42- Assign Teachers to a House	Obsolete	Elizabeth Louros	This requirement was based on functionality in LAUSDMAX. In MISIS we do not use the term House. SICs essentially function the same way as "house" used to in SchoolMAX, but they are managed using the Groups functions and scheduling features in MISIS, without having to build any unique new software to do so.	BN
21		x	SS1, SS2	Intercession/ESY/Summer Sessions Edits	Complete			BN
21			SS1	SS1 - generate summer school enrollment records in mass	Complete/Fully Functional (In Production)	Elizabeth Louros	Course requests are generated en masse. This is done with Advanced Search, and then using the Actions options contain one for Summer School.	BN
21			SS2	SS2 - ability to indicate which school a student will be enrolled for the summer	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
22		x	NY1	Matriculation Dates Configuration	Complete	Mary Lu Camacho		BN
22				NY1 - generate next year enrollment records in mass	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
23		x		Exclusions from Modified Consent Decree (MCD) ISIS Checklist on May 20, 2011	Obsolete			N/A
24	Area: Attendance	x	AT20	Set Attendance Configuration	Complete	Luz Marquez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
24				AT20- System Administration attendance configuration	Complete/Fully Functional (In Production)	Luz Marquez		BN
25	Area: Attendance	x	A10	Generate Attendance-related Forms and Documents A10 - Generate and track attendance notification letters	Complete	Luz Marquez	Business owners have not confirmed all notification letters and they are currently revising their policy. Bulletin 4926 is still not revised by Business Owners (pupil services), so this requirement is temporarily on hold. Update 20190208: The Bulletin has still not been updated, but Reference Guide 6554.3 contains appropriate information. All known notification letters are included in MISIS.	BN
26	Area: Attendance	x	A1, A2, A3, A4, AT19, AT18, A8, AT17	Input/Update/Access Attendance Information	Complete	Luz Marquez		BN
26			A1	A1 - Record and certify Negative Period attendance (status and reason codes)	Complete/Fully Functional (In Production)	Luz Marquez		BN
26			A2	A2 - Record and certify Positive Period attendance (status and reason codes)	Complete/Fully Functional (In Production)	Luz Marquez		BN
26			A3	A3 - Record and certify Hourly Positive attendance (status and reason codes)	Complete/Fully Functional (In Production)	Luz Marquez		BN
26			A4	A4 - Record and certify Positive Period (Clock Hour) attendance (status and reason codes)	Complete/Fully Functional (In Production)	Luz Marquez		BN
26			A8	A8 - Enter and track SARB records by School and District	Complete/Fully Functional (In Production)	Luz Marquez	Tracking of SARB by School and District is done manually. There is an enhancement pending (approximately February, 2017). PSA is apparently developing their own case mgt system! Robert will f-u about that. I suggested Welligent. Attendance Ad Hoc is live as of 3/21. Finally, a SARB report is due to be delivered on 5/2. Update 10/5/17: I've seen enhanced SARB functionality in MISIS that looks good. I've agreed to sign off on this requirement once the MISIS team provides a revised system architecture diagram that shows how the PSA Case Mgmt system relates to MISIS.	BN
26			A17	AT17- Submitting Attendance	Complete/Fully Functional (In Production)	Luz Marquez		BN
26			A18	AT18-Call log	Complete/Fully Functional (In Production)	Luz Marquez	Select student, then click on link at left for "Contact Log."	BN
26			A19	AT19 Mass attendance batch update, by groups	Complete/Fully Functional (In Production)	Luz Marquez	Advanced search-More-Manage Attendance	BN
27	Area: Attendance	x	A10, A6, A7	Generate Attendance Reports and Notifications	Complete	Luz Marquez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
27			A10	A10 - Generate and track attendance notification letters	Complete/Fully Functional (In Production)	Luz Marquez	Business owners have not confirmed all notification letters and they are currently revising their policy. Bulletin 4926 is still not revised by Business Owners (pupil services), so this requirement is temporarily on hold.	BN
27			A6	A6 - Monitor unresolved absences--school wide	Complete/Fully Functional (In Production)	Luz Marquez	done by using Advanced Search function for unclear absences, or by running report by same name.	BN
27			A7	A7 - Monitor individual student and school-wide attendance via application and downloadable reports, including all attendance statuses, reason codes, exception reports, and other information.	Complete/Fully Functional (In Production)	Luz Marquez		BN
28	Area: Attendance	x	E20 a-n, E20; E19	Capture Student Information for Extracurricular Activities	Complete	Luz Marquez		BN
28			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
28			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
28			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
28			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
28			E20C	E20c (District Ath. Director) - Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
28			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN
28			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN
28			E20F	E20f -(School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
28			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN
28			E20H	E20h -(School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
28			E201	E201 - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez	Enhancement pending to rename "Remarks" page (Miscellaneous-Athletics-Remarks) to "Waiver." This is to override only those rules for which a waiver is available.	BN
28			E20J	E20J - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
28			E20K	E20K (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
28			E20L	E20L - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
28			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
29	Area: Mark Reporting	x	G10, G13	Input/Update Student Marks	Complete	Frank Ramirez		BN
29			G10	G10 - Enter Grades and comments during grade entry window	Complete/Fully Functional (In Production)	Frank Ramirez	Will change when all teachers are using Schoology GB. Office staff will still use the same MISIS screen(s) for editing purposes.	BN
29			G13	G13 - Enter Post Cut-Off grades	Complete/Fully Functional (In Production)	Frank Ramirez	This uses the same screens as for initial grade entry, but post-cutoff entry access is controlled by role.	BN
30	Area: Mark Reporting	x	G14, G7	Verify Student Marks	Complete	Frank Ramirez		BN
30			G14	G14 - Manage Honor Roll Criteria and Recipients (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	All governed by the parameters specified in an Honor Roll report, so it could literally change every time the report is run. Update 20190212: Disagree with this design, but no desire from business owners to alter it.	BN
30			G7	G7 - Monitor Grade entry	Complete/Fully Functional (In Production)	Frank Ramirez	Reports run by school office staff (Principals, office managers, counselors, etc.) that show by teacher what grades have not been submitted. The Teacher Verification of Marks is still used to have each teacher sign off on all grades submitted. School Admins can also view grades entered by teacher, with an indicator showing whether or not all grades have been submitted for each class.	BN
31	Area: Mark Reporting	x	G11	Generate Progress Reports/Report Cards	Complete	Frank Ramirez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
31			G11	G11 - Generate report card	Complete/Fully Functional (In Production)	Frank Ramirez	Current report cards are generated properly. California content standards report cards (for Elementary students only) will require enhancement and is expected to be live for Fall 2017. Being piloted as of 3/8/2017. FR will notify me when rolled out completely and will demo it to me at that time.	BN
32	Area: Mark Reporting	x	G6a, G13, G10	Update Student Cumulative Folder	Complete	Frank Ramirez	For the purposes of showing grades, transcripts, etc. this is adequate, but not as an electronic cum that would include collected documents from parents, etc. Enhancement Due for delivery in early May, 2017.	BN
32			G10	G10 - Enter Grades and comments during grade entry window	Complete/Fully Functional (In Production)	Frank Ramirez	Will change when all teachers are using Schoology GB. Office staff will still use the same MISIS screen(s) for editing purposes.	BN
32			G13	G13 - Enter Post Cut-Off grades	Complete/Fully Functional (In Production)	Frank Ramirez	This uses the same screens as for initial grade entry, but post-cutoff entry access is controlled by role.	BN
32			G6a	G6a - Provide a grade audit trail	Complete/Fully Functional (In Production)	Frank Ramirez	Student audit doesn't seem to be working. Possible bug. No audit report is available on the reports menu. Enhancement may be pending to depict more detail. Due for delivery in early May, 2017.	BN
33	Area: Mark Reporting	x	G4, G5, G8, G20, G16, P1, P2, E12b, E12g	Student Information Tracking and Analysis (Intervention participation, student rankings, course type/program versus achievement, etc.)	Complete	Frank Ramirez		BN
33			E12B	E12b - Reclassify students and document parent notifications	Complete/Fully Functional (In Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
33			G16	G16 - Print Reports for Counseling and secondary school usage	Complete/Fully Functional (In Production)	Frank Ramirez	Distribution of Marks report	BN
33			G20	G20 Ability to enter warning notice information and retention warnings.	Complete/Fully Functional (In Production)	Frank Ramirez	Practice is to do this only for elementary students.	BN
33			G4	G4 - Calculate GPAs (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Calculated by grad standard requirements.	BN
33			G5	G5 - Calculate Rank (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Calculated by grad standard requirements.	BN
33			G8	G8 - Provide Graduation Verification to Employers (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Office staff look at leave codes/reasons. Graduation date is depicted on transcripts, but schools would not share a student's transcript with an employer.	BN
33			P1	P1 - Define program definitions	Complete/Fully Functional (In Production)	Elizabeth Louros	Does not yet exist. Included in Sketch 2930C.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
33			P2	P2 - Identify student eligibility for a given program	Complete/Fully Functional (In Production)	Elizabeth Louros	I cannot find a way to pre-establish eligibility criteria for a program, and then to automatically select/nominate students, based upon the criteria. Likewise, there doesn't seem to be any way to create eligibility rules that evaluate a student's right to participate. This can be accomplished, however, by using a dynamic group, with selection criteria. Further, the members of the group can be assigned to an academic intervention service en masse.	BN
34	Area: Mark Reporting	x	G4, G5, G7, G14, G16	Data Analysis and Reporting	Complete			BN
34			G14	G14 - Manage Honor Roll Criteria and Recipients (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	All governed by the parameters specified in an Honor Roll report, so it could literally change every time the report is run. Update 20190212: Disagree with this design, but no desire from business owners to alter it.	BN
34			G16	G16 - Print Reports for Counseling and secondary school usage	Complete/Fully Functional (In Production)	Frank Ramirez	Distribution of Marks report	BN
34			G4	G4 - Calculate GPAs (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Calculated by grad standard requirements.	BN
34			G5	G5 - Calculate Rank (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Calculated by grad standard requirements.	BN
34			G7	G7 - Monitor Grade entry	Complete/Fully Functional (In Production)	Frank Ramirez	Reports run by school office staff (Principals, office managers, counselors, etc.) that show by teacher what grades have not been submitted. The Teacher Verification of Marks is still used to have each teacher sign off on all grades submitted. School Admins can also view grades entered by teacher, with an indicator showing whether or not all grades have been submitted for each class.	BN
35			G1	G1 - Define GPA definition (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	There is no administrative screen/interface for this purpose. GPA definitions are essentially "hard-coded". Any changes would require a programmer's intervention.	BN
35			G10	G10 - Enter Grades and comments during grade entry window	Complete/Fully Functional (In Production)	Frank Ramirez	Will change when all teachers are using Schoology GB. Office staff will still use the same MISIS screen(s) for editing purposes.	BN
35			GS11	GS11 - Provide report that shows graduation progress for selected students	Complete/Fully Functional (In Production)	Frank Ramirez		BN
35			GS12	GS12 - Provide an audit report to ensure a student who has a diploma should meet graduation standards	Complete/Fully Functional (In Production)	Frank Ramirez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
35			G2	G2 - Define report card format	Obsolete	Frank Ramirez	The LAUSDMAX application allowed central office ISIS Team to custom build the report card. There is no such functionality in MISIS, and the report card design is static.	N/A
35			GS2	GS2 - Push down Grad Std to schools	Obsolete	Frank Ramirez	The LAUSDMAX application allowed central office ISIS Team to custom define different sets of Grad Standards. There is no such functionality in MISIS, and each of the different sets of Grad Standards have been coded and each applies to students as appropriate based on student's Grad Year.	N/A
35			TR	TR - Build interface to bring Adult Ed Credits to MISIS (eliminate manual entry)	Partially Complete/Partially Functional (In Production)	Frank Ramirez	All of the coding has been completed. The next step is to document the process for the counselors, which will be completed in the next couple of weeks. This interface should be available in November 2016 so that grades can be sent to MISIS by December 2016. This solution excludes students who do not have an enrollment in another LAUSD school (in MISIS). Adult school students also do not get a District ID. Update 20190215: The replacement system, DACESIS, will also support the same process once the application is in Production. ETA July 2019.	N/A
35	Area: Transcripts	x	G1, GS2, GS11, GS12, TR, G2, G10	Student Information Tracking and Analysis (e.g. entering contract credits)	TR Partially Complete	Frank Ramirez	See TR.	N/A
36	Area: Transcripts	x	G4	Calculate multiple GPA types	Complete	Frank Ramirez	Calculated by grad standard requirements.	BN
36			G4	G4 - Calculate GPAs (secondary only)	Complete/Fully Functional (In Production)	Frank Ramirez	Calculated by grad standard requirements.	BN
37	Area: Transcripts	x	TR3	Generate and Send Transcripts by Type	Complete	Frank Ramirez		BN
37			TR3	TR3 - Print transcript report	Complete/Fully Functional (In Production)	Frank Ramirez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
38	Area: Transcripts	x	TR1 - TR5	Maintain Student Cumulative Folder	Complete	Frank Ramirez	There are some questions as to what else should be included in a student's electronic cumulative folder, but it is obviously more than just transcript information. Needs follow up. Update 20180411: There is a student comprehensive report in MyData that effectively compiles an electronic cumulative folder. Robert will arrange a demonstration of this.	BN
38			TR1	TR1 - Enter/Edit Transcript Data Manually	Complete/Fully Functional (In Production)	Frank Ramirez	This function exists, but changes are not immediately reflected in the Graduation Eligibility Screens/reports. Update 20180406: There is also no way to enter multiple courses to transcripts with the same transaction. I've recommended an enhancement to immediately update the Graduation Eligibility Screens and reports, but the function can be accepted as it is. Update 20181211: Although courses are entered 1 at a time, the screen preserves all the settings and allow entry of more courses for the same student by simply clicking on "Continue." Chages are now reflected on screens and reports.	BN
38			TR2	TR2 - Enter Comment on transcript for special circumstances or acknowledgements.	Complete/Fully Functional (In Production)	Frank Ramirez		BN
38			TR3	TR3 - Print transcript report	Complete/Fully Functional (In Production)	Frank Ramirez		BN
38			TR4	TR4 - Post final marks to transcripts	Complete/Fully Functional (In Production)	Frank Ramirez		BN
38			TR5	TR5 - Review Transcript Audit	Complete/Fully Functional (In Production)	Frank Ramirez	Exists, but not working properly. Transcript changes are not immediately shown on the Transcript Audit report for the student. Due for delivery in early May, 2017. Update 20171010: New transcript entries are not displayed in the audit screen. Update 20180410: New entries were not part of the original specification, so only changes are displayed in the audit screen.	BN
39	Area: Transcripts	x	GS6, GS7a, GS9, GS13, C25, GS1, GS3, GS5	Track and Maintain Graduation Requirements	Complete	Frank Ramirez		BN
39			C25	C25 - Assign Graduation Year	Complete/Fully Functional (In Production)	Frank Ramirez		BN
39			GS1	GS1 - Maintain multiple sets of graduation standards	Complete/Fully Functional (In Production)	Frank Ramirez		BN
39			GS13	GS13 - Provide On Track for Graduation report	Complete/Fully Functional (In Production)	Frank Ramirez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
39			G55	G55 - Track progress towards Graduation (IGP)	Complete/Fully Functional (In Production)	Frank Ramirez	IGP report exists for use by counselors with parents and students, and there is also a Graduation Progress report that is available in the Parent Portal (very easy to view and understand). Update 8/14/2017: The only remaining issue is immediately updating students' progress when manual transcript entries are done. Update 20180405: Nothing has changed. Update 20181211: Student progress is now updated as soon as the manual transcript entries are saved.	BN
39			G56	G56 - Enter Student's Career Pathway Choice	Complete/Fully Functional (In Production)	Frank Ramirez	Academics - Graduation Standards	BN
39			G59	G59 - Enter Student's Post Secondary Plans	Complete/Fully Functional (In Production)	Frank Ramirez	Academics - Graduation Standards	BN
39			G53	G53 - Associate student(s) to a Grad Std with Priority	Obsolete	Frank Ramirez	The LAUSDMAX application allowed central office SIS Team to custom build the report card. There is no such functionality in MISIS, and the report card design is static.	BN
39			G57A	G57a - System automatically updates completion status of a competency graduation standard	Obsolete	Frank Ramirez	MISIS did automatically update that requirement for the Grad Standards of the class of 2015. For Class of 2016 and beyond, competency in Computer Literacy is no longer a graduation requirement.	N/A
40	Area: Testing	x	T3, T4	Preparation for Tests	Complete	Marie Reyes		BN
40			T3	T3 - Generate Pre-ID files. Pre-ID files are needed to send student identification and demographic information to the test vendor	Complete/Fully Functional (In Production)	Marie Reyes	This function is done with the Standardized Student Test (SST) application by the Office of Data and Accountability (ODA). Test booklet bar codes are scanned by the testing centers into another ODA application. This file is made available/uploaded into MISIS for later test discrepancy reporting. This is questionable from the perspective of having a truly integrated system. Still needs f-u as to eliminating a "middle man", since identifying students who haven't yet been tested can be done by seeing which ones don't have scores in MISIS. 3/8/2017 Update 20190212: There is no institutional desire to redesign this function.	BN
40			T4	T4 - Generate test coding roster for hand coding answer documents. This is needed for students who do not have a Pre-ID test form/booklet from the test vendor.	Complete/Fully Functional (In Production)	Marie Reyes		BN
41	Area: Testing	x	E12	Determine Students' EL Level	Complete	Marie Reyes		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
41			E12	E12 - Identify and monitor English Learners (and see P9 for another EL requirement)	Complete/Fully Functional (in Production)	Marie Reyes		BN
42	Area: Testing	x		Administration of Online Testing	Complete	Marie Reyes	Schools use Test Operations Management System (TOMS) administered by the state. Data flow is MISIS-CALPADS-TOMS. No direct interface to TOMS from MISIS? Marie will follow up on data flow for incremental updates. Update 5/3/2017 - Only test to which this currently applies is SB. MISIS testing roster for SB satisfies this requirement, as it indicates if there are missing data for any students to be tested, and if corrected, the data flow above achieves the updates.	BN
43		x	T5	Collect/Enter/Update Student Test Data	Complete	Marie Reyes		BN
43			T5	T5- Enter test scores and determine performance level. Ability for authorized users to add/edit/delete student test scores and subtest scores.	Complete/Fully Functional (in Production)	Marie Reyes	Test scores can be manually entered for individual students, but performance level is not currently auto-calculated. Update 5/3/2017 - Only COM-Annual is currently configured to do this. All other tests should be similarly configured, and then this item could possibly be done. Update 12/12/17 - new enhancement for CELDT data entry failed to auto-calculate performance level, and instead requires entry of performance level that is then validated.	BN
44		x	T1	Capture Performance Levels Configuration	Complete	Marie Reyes	Feature exists, but does not appear to be doing anything.	BN
44			T1	T1 - Maintain testing definition, including ongoing and future changes in State tests and subtests.	Complete/Fully Functional (in Production)	Marie Reyes		BN
45		x	T7	Evaluate Test Results	Complete	Marie Reyes		BN
45			T7	T7 - Monitor individual student and school-wide test results via application and reports	Complete/Fully Functional (in Production)	Marie Reyes	Some reports are available that are specific to certain tests, but the enterprise ad hoc reporting tool allows for many other reporting options.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
46			E121	E121 - Generate reports to monitor English Learners and provide notification to parents.	Complete/Fully Functional (in Production)	Marie Reyes	Entering the notification dates for letters going to parents is done via Admin-Mass Notification Date Entry, not one student at a time. This is a separate process from generating the notification letters, because they have to record whether it is attempt 1, 2, or 3.	BN
46			E28	E28 - Generate miscellaneous reports for office use	Complete/Fully Functional (in Production)	Elizabeth Louros		BN
46		x	E121, GT13, E28	Notification to Parents	GT13 Partially Complete	Marie Reyes	The only testing-related notifications to parents that are available in MISIS are for english learners.	BN
46			GT13	GT13 - Generate reports	Partially Complete/Partially Functional (in Production)	Elizabeth Louros		BN
47		x	MyDATA	Generate Testing Reports	Partially Complete/Partially Functional (in Production)	Marie Reyes	Testing Reports Available in MISIS: CELDT Coding Roster, CELDT Test Discrepancy Report, CST Coding Roster, SBA Exemption Report, SBA Label & Student Roster, SBA Roster. Still working on Fitness Test Discrepancy Report, Fitness Coding Roster, Fitness Test State Report Reports in MyData: SBAC reports, Early Assessment Program, Physical Fitness, CELT for english learners, historical CST AND CAHSEE, DIBELS (dynamic indicators of basic early literacy skills), OLSAT (test for gifted students). There is no specific report showing OLSAT test results in MyData, although the scores do appear as a column in the Class Roster report. Also, using the MISIS Ad Hoc tool, the user is able to generate a custom report of all students who have taken OLSAT, with their scores. In MyData, the user can isolate Foster Youth data from within all relevant reports.	BN
48	Area: Counseling	x	P1, P2	Intervention Program Identification and Selection	Complete	Elizabeth Louros		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
48			P1	P1 - Define program definitions	Complete/Fully Functional (in Production)	Elizabeth Louros	Does not yet exist. Included in Sketch 2930C.	BN
48			P2	P2 - Identify student eligibility for a given program	Complete/Fully Functional (in Production)	Elizabeth Louros	It's possible to generate a list of students (using Advanced Search functions) that match program criteria, and even add all of them to the program at once.	BN
49	Area: Counseling	x	E12a-f	Language Proficiency	Complete	Marie Reyes		BN
49			E12A	E12a - Identify and monitor English Learner Language Classification	Complete/Fully Functional (in Production)	Marie Reyes	Established and entered by EL Coordinator (unofficially), but then confirmed by CELDT (received in interface from testing vendor).	BN
49			E12B	E12b - Reclassify students and document parent notifications	Complete/Fully Functional (in Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
49			E12C	E12c - Record English Language Development Level	Complete/Fully Functional (in Production)	Marie Reyes	Based upon the CELDT overall score. Loaded from interface, not entered manually.	BN
49			E12D	E12d - Record Program Placement and parent notification dates	Complete/Fully Functional (in Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
49			E12E	E12e - Record Parental Exception Waiver request	Complete/Fully Functional (in Production)	Marie Reyes	Pending enhancement to prevent entering a waiver request for anything other than LEP.	BN
49			E12F	E12f - Record information for Language Appraisal Team meetings.	Complete/Fully Functional (in Production)	Luz Marquez	Functionality exists, but will be replaced, pending Sketches S12, S18, and S31. Development completed, but release date not yet established.	BN
50	Area: Counseling	x	CO14, GS11, SE7	Assist Students with Academic Planning	Complete			BN
50			CO14	CO14 - Ability for teacher to add notes to a referral in the teacher portal	Complete/Fully Functional (in Production)	Luz Marquez	Needs to be done at the time of entering the referral, but allows for detailed notes.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
50			GS11	GS11 - Provide report that shows graduation progress for selected students	Complete/Fully Functional (In Production)	Frank Ramirez		BN
50			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (In Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
51	Area: Counseling	x	CO14, P1, P3	Capture Intervention Program Data	Complete	Elizabeth Louros		BN
51			CO14	CO14 - Ability for teacher to add notes to a referral in the teacher portal	Complete/Fully Functional (In Production)	Luz Marquez	Needs to be done at the time of entering the referral, but allows for detailed notes.	BN
51			P1	P1 - Define program definitions	Complete/Fully Functional (In Production)	Elizabeth Louros	Included in Sketch 2930C. Updated 3/1/2017	BN
51			P3	P3 - Create program participation records for eligible students	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
52	Area: Counseling	x	CO12, P10, P4	Evaluation of Intervention Programs	Complete			BN
52			CO12	CO12 - Ability for all admin portal users to view contacts and referrals	Complete/Fully Functional (In Production)	Luz Marquez		BN
52			P10	P10 - View program history for a given student	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
52			P4	P4 - View participants in a particular program	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
53	Area: Counseling	x	CO11, E28, P10, SE1, SE4, SE7, T7	Generate Academic Intervention Reports	CO11 Partially Complete	Luz Marquez		BN
53			E28	E28 - Generate miscellaneous reports for office use	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
53			P10	P10 - View program history for a given student	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
53			SE1	SE1 - Review special ed. summary information from Welligent via interface	Complete/Fully Functional (In Production)	Elizabeth Louros	Problems with current interface (multiple services for the same service type) Update 8/10/17: Problems with multiple services solved.	BN
53			SE4	SE4 - Print reports for monitoring class placement for special education students	Complete/Fully Functional (In Production)	Mary Lu Camacho		BN
53			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (In Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
53			T7	T7 - Monitor individual student and school-wide test results via application and reports	Complete/Fully Functional (In Production)	Marie Reyes	Some reports are available that are specific to certain tests, but the enterprise ad hoc reporting tool allows for many other reporting options.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
53			CO11	CO11 - Ability to have an alert notification when a referral has been sent by teacher or admin portal user	Partially Complete/Partially Functional (In Production)	Luz Marquez	Needs testing by BN, just for verification purposes (on alerts actually being sent). Alert email setup is in place and seems very flexible (by type of referral, for instance).	BN
54	Area: Counseling	x	P2	Students Not Currently Enrolled	Complete			BN
54			P2	P2 - Identify student eligibility for a given program	Complete/Fully Functional (In Production)	Elizabeth Louros	The dynamic groups functions accommodate this requirement for some programs, and other tools (e.g. Ad Hoc) or reports are employed for the pre-defined programs.	BN
55	Area: Counseling	x	SST1, SST2, SST3, SST6, H8, H8a, E12, E12a-j, S6, C4, C4a-d, P2, GT2 - GT13	Students with Special Needs (e.g. SST, 504, EL, Gifted, Migrant, programs)	C4, GT13 Partially Complete; C4A, SST6 Planned			BN
55			CAb	CAb - System calculates Migrant qualification expiration date based on rule/length of time provided to System Administrator	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
55			CAc	CAc - Capture Migrant program participation pre-test and post-test scores [appears with Testing requirements]	Complete/Fully Functional (In Production)	Elizabeth Louros	Migrant Test scores (inside of the Academics-Test Scores menu) are manually scored and entered.	BN
55			CAd	CAd - Provide reports for the Migrant Education office, including Migrant Master List, Migrant labels, Re-Enrollment Report (exception list to reconcile with county's report), Supplemental Services List (to reconcile with county's report), and Annual Verification Report (to reconcile with county's report).	Complete/Fully Functional (In Production)	Elizabeth Louros	Reports are available, and service data will display, provided the Migrant office personnel have added the service data (mass entry screen works very well). The Annual Verification Report is accomplished by using the Re-enrollment Report.	BN
55			E12	E12 - Identify and monitor English Learners (and see P9 for another EL requirement)	Complete/Fully Functional (In Production)	Marie Reyes		BN
55			E12A	E12a - Identify and monitor English Learner Language Classification	Complete/Fully Functional (In Production)	Marie Reyes	Established and entered by EL Coordinator (unofficially), but then confirmed by CELDT (received in interface from testing vendor).	BN
55			E12B	E12b - Reclassify students and document parent notifications	Complete/Fully Functional (In Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
55			E12C	E12c - Record English Language Development Level	Complete/Fully Functional (In Production)	Marie Reyes	Based upon the CELDT overall score. Loaded from interface, not entered manually.	BN
55			E12D	E12d - Record Program Placement and parent notification dates	Complete/Fully Functional (In Production)	Marie Reyes	Process and system questions. I may need some additional training about this.	BN
55			E12E	E12e - Record Parental Exception Waiver request	Complete/Fully Functional (In Production)	Marie Reyes	Pending enhancement to prevent entering a waiver request for anything other than LEP.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
55			E12F	E12f - Record information for Language Appraisal Team meetings.	Complete/Fully Functional (in Production)	Luz Marquez	Functionality exists, but will be replaced, pending Sketches S12, S18, and S31. Development completed, but release date not yet established.	BN
55			E12G	E12g - RFEF Monitoring	Complete/Fully Functional (in Production)	Marie Reyes	Function exists to capture dates, but will be removed, because EL coordinators are not using it. The RFEF Monitoring Roster and letter are used annually, however.	BN
55			E12H	E12h - Record Diagnostic Placement Inventory.	Complete/Fully Functional (in Production)	Marie Reyes	This is now an optional test for 5th and 6th grade students. There is some kind of data issue, though, because many historical records appear in an ad hoc analysis that are not viewable in MISIS. There is a setup in MISIS to record these results. Marie is following up, however, on why DPI scores from the past are not showing up in Test History screen. Bug report submitted and resolved.	BN
55			E12I	E12i - Generate reports to monitor English Learners and provide notification to parents.	Complete/Fully Functional (in Production)	Marie Reyes	Entering the notification dates for letters going to parents is done via Admin-Mass Notification Date Entry, not one student at a time. This is a separate process from generating the notification letters, because they have to record whether it is attempt 1, 2, or 3.	BN
55			E12J	E12j- Primary Language Assessments for Students	Complete/Fully Functional (in Production)	Marie Reyes		BN
55			G102	G102 - ability to create, activate, maintain, copy, search, view, and print check lists.	Complete/Fully Functional (in Production)	Elizabeth Louros	Available via Referral Screen, assigning the checklist to the classroom teacher to complete before the screening committee meets.	BN
55			G103	G103 - ability to set and search eligibility rules	Complete/Fully Functional (in Production)	Elizabeth Louros	Previously we were going to build a screen where rules could be entered. However that is no longer happening. Instead, GATE office provides the rules to MISIS, and a developer writes a script which is run to identify students. This only applies to students who may qualify for high achievement and specific academic abilities. For "intellectual ability" referrals, a school psychologist has to administer a test. This is an illogical and seemingly inappropriate approach, but perhaps when I see how the process flows, it will make more sense. Update 20180411: Robert will set up a demo for next week. Update 20190208: Demo of workflow and automatic generation of referrals indicates this requirement is satisfied.	BN
55			G104	G104 - Display and maintain a student's checklist	Complete/Fully Functional (in Production)	Elizabeth Louros	Specific checklists are built for each eligibility category.	BN
55			G105	G105 - ability to create and maintain data related to a student's GATE referral (including applying eligibility rules)	Complete/Fully Functional (in Production) Page 26 of 57	Elizabeth Louros		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
55			GT06	GT06 - ability to view student GATE information	Complete/Fully Functional (in Production)	Elizabeth Louros	Any teacher can see the GATE summary screen. Additionally, Scheduling, reports, Grad Standards, etc. reflect GATE status.	BN
55			GT07	GT07 - ability to enter notes	Complete/Fully Functional (in Production)	Elizabeth Louros	Notes can be entered by the Psychologist or the Central Gate office in the referral screen panels.	BN
55			GT08	GT08 - ability to record GATE student eligibility decision	Complete/Fully Functional (in Production)	Elizabeth Louros		BN
55			GT09	GT09 - ability to enter reassessment request and response.	Complete/Fully Functional (in Production)	Elizabeth Louros	Parents or school personnel or even the GATE Psychologist can request a reassessment. Any such requests have to be sent by the school to the District GATE office, who has capability to enter the relevant information. Once the reassessment is completed by the Psychologist, if the student now qualifies, then a new referral is created by the District GATE office, and the student becomes a participant.	BN
55			GT1	GT1 - Requirement for field level security	Complete/Fully Functional (in Production)	Elizabeth Louros	The MISIS Test Definition screen has the ability to grant security access by test, by user role, and by permission (read, edit, delete, add).	BN
55			GT11	GT11 - capability to configure GATE assessment dates and define URLs by category.	Complete/Fully Functional (in Production)	Elizabeth Louros	Previously we were going to build a screen where dates could be entered. However that is no longer happening. Instead, the GATE office provides the dates to MISIS, and a developer writes a script which is run to configure dates and define URLs. This doesn't really exist, but is not necessary, as testing is administered directly by the GATE psychologists. Test configuration is setup just as any other test is in MISIS.	BN
55			GT12	GT12 - capability to search for a GATE student	Complete/Fully Functional (in Production)	Elizabeth Louros	GATE Search Screen or Advanced Student Search screens.	BN
55		H8	H8	H8 - Maintain 504 indicator and date	Complete/Fully Functional (in Production)	Elizabeth Louros	Via interface from Welligent	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
55			H8A	H8a - Use indicator to monitor 504 eligible students who do not have 504 plans	Complete/Fully Functional (In Production)	Elizabeth Louros	The Section 504 Accommodation report can be exported to Excel, and this analysis, along with many others can be accomplished. There is a superior report capability in Welligent, including a specific report called "Eligible - No 504."	BN
55			P2	P2 - Identify student eligibility for a given program	Complete/Fully Functional (In Production)	Elizabeth Louros	The dynamic groups functions accommodate this requirement for some programs, and other tools (e.g. Ad Hoc) or reports are employed for the pre-defined programs.	BN
55			S6	S6 - Creation of Initial Master schedule	Complete/Fully Functional (In Production)	Mary Lu Camacho	School User is able to create a master schedule using the Scenario Manager function	BN
55			SST1	SST1 - Student study team	Complete/Fully Functional (In Production)	Luz Marquez	The SST screens were replaced by the Student Support and Progress Team (SSPT) screens. These combine the existing functions for the Coordination of Services Team (COST), Student Study Team (SST), and Language Appraisal Team (LAT). Profile-Support-SSPT Referral.	BN
55			SST3	SST3 - View SST information online	Complete/Fully Functional (In Production)	Luz Marquez	The SST screens were replaced by the Student Support and Progress Team (SSPT) screens. These combine the existing functions for the Coordination of Services Team (COST), Student Study Team (SST), and Language Appraisal Team (LAT).	BN
55			GT10	GT10 - ability for school administrators to submit goals and track progress towards goals	Obsolete	Elizabeth Louros	No plan for this. GATE office chose not to submit goals and track progress in MISIS, so the process happens manually. Is there another system in which this is happening? Per Elizabeth 3/15/2017, data are entered via a "Principal's Portal." EL will try to get some report info from an exemplary GATE school. Update 6/7/17 - I've agreed that the Principal's Portal satisfies this requirement, and will approve it as soon as the Principal's Portal is properly reflected (with this and any other functions depicted) in the System Architecture diagram.	BN
55			C4	C4 - Capture Migrant information	Partially Complete/Partially Functional (In Production)	Elizabeth Louros		BN
55			GT13	GT13 - Generate reports	Partially Complete/Partially Functional (In Production)	Elizabeth Louros		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
55			C4A	C4a - Capture Migrant information for non-LAUUSD students and for West-ED research purposes	Planned	Elizabeth Louros	New functionality created that essentially allows the Migrant office to be a school, and enroll non-LAUUSD students. Updated 3/1/2017	BN
55			SST2	SST2 - Online forms	Planned	Luz Marquez	The SSPT reports are part of the Student Support BSR which will be delivered by the end of November 2016. Some links to create meeting details (for the SSPT team) are broken (as of 11/8/2016). Luz is submitting trouble ticket. Reports in support of this process are scheduled to be done by 1/18/2017. Business owner apparently did not ask for Parent letters to be system generated or tracked.	BN
55			SST6	SST6 - Alert	Planned	Luz Marquez	We had previously implemented an SST profile alert, but now that SST was changed to SSPT, the logic for this alert needs to change. Scheduled for May, 2017 delivery.	BN
56	Area: Counseling	x	CO1, CO9, C10	Capture Counseling Data Elements	Complete			BN
56			C10	C10 - Ability to mass update student contacts	Complete/Fully Functional (In Production)	Luz Marquez		BN
56			CO1	CO1 - Track contacts regarding students	Complete/Fully Functional (In Production)	Luz Marquez	This can be done in two ways. The first is to view counseling history under the individual student's profile (Profile-Support-Counseling Comm). The second method allows viewing history for multiple students. That is to use the Counseling Communications report.	BN
56			CO9	CO9 - Add counseling notes (different from the notes associated with contacts)	Complete/Fully Functional (In Production)	Luz Marquez	The Contact Log allows for other types of notes. (Profile-Contact Log, which is a link at the top left of the page, under the student ID).	BN
57			D9	D9 - Mandated reporting of certain student behaviors	Complete/Fully Functional (In Production)	Luz Marquez	For the purpose of notifying teachers and administrators about student behaviors, there is an indicator on the student's profile if any incidents have been recorded. Then the user can view all referrals (Support-Referrals). For annual reporting to the CDE, ODA uses data from MISIS to compile the report in another system. Need follow up on this. Reporting should be directly from MISIS.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
57	Area: Counseling	x	D6, D9	Compliance Management	D6 Planned			BN
57			D6	D6 - (Central Office) Provide Expulsion case management functionality	Planned	Luz Marquez	This has been deemed obsolete. There is a standalone system employed, with an interface from MISIS. Luz will send the rules document for what gets displayed in MISIS to Bob.	BN
58			CO7	CO7 - Refer student to counselor for non-disciplinary purposes	Complete/Fully Functional (In Production)	Luz Marquez		BN
58			D4	D4 - (School Staff) Generate Discipline Reports	Complete/Fully Functional (In Production)	Luz Marquez		BN
58			G16	G16 - Print Reports for Counseling and secondary school usage	Complete/Fully Functional (In Production)	Frank Ramirez	Distribution of Marks report	BN
58			ST2	ST2 - Generate and certify Statistical Report	Partially Complete/Partially Functional (In Production)	Luz Marquez	Reporting interface/generation is in place, but online certification is pending development (targeted for late Spring, 2017). Update 20190213: The plans for meeting the ST2 and ST3 requirements were abandoned for 3 reasons: (1) the State does not support the electronic submission of statistical data (2) the level of effort to provide the functionality in MISIS was significant and deemed moot once reason #1 was confirmed and (3) the Business Owners are content with the current processes.	N/A
58	Area: Counseling	x	D4, ST2, CO7 (s/b CO7), G16	Generate Counseling Reports	ST2 Partially Complete			BN
59			T3	T3 - Generate Pre-ID files. Pre-ID files are needed to send student identification and demographic information to the test vendor	Complete/Fully Functional (In Production)	Marie Reyes	This function is done with the Standardized Student Test (SST) application by the Office of Data and Accountability (ODA). Test booklet bar codes are scanned by the testing centers into another ODA application. This file is made available/uploaded into MISIS for later test discrepancy reporting. This is questionable from the perspective of having a truly integrated system. Still needs f-u as to eliminating a "middle man", since identifying students who haven't yet been tested can be done by seeing which ones don't have scores in MISIS. 3/8/2017 Update 20190212: There is no institutional desire to redesign this function.	BN
59			T7	T7 - Monitor individual student and school-wide test results via application and reports	Complete/Fully Functional (In Production)	Marie Reyes	Some reports are available that are specific to certain tests, but the enterprise ad hoc reporting tool allows for many other reporting options.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
59			SST6	SST6 - Alert	Planned	Luz Marquez	We had previously implemented an SST profile alert, but now that SST was changed to SSPT, the logic for this alert needs to change. No date yet for this enhancement.	BN
59	Area: Counseling	x	T7, T3, SST6	Needs Assessment (for testing)	SST6 Planned	Marie Reyes		BN
60			CO12	CO11 - Ability to have an alert notification when a referral has been sent by teacher or admin portal user	Complete/Fully Functional (In Production)	Luz Marquez		BN
60			CO14	CO12 - Ability for all admin portal users to view contacts and referrals	Complete/Fully Functional (In Production)	Luz Marquez		BN
60			CO15	CO14 - Ability for teacher to add notes to a referral in the teacher portal	Complete/Fully Functional (In Production)	Luz Marquez		BN
60			CO7	CO15 - Ability for teacher (in the teacher portal) to add previous interventions along with the referral sent to the counselor	Complete/Fully Functional (In Production)	Luz Marquez	Great feature as far as behavioral interventions. Academic interventions (Services-Academic Intervention) are treated differently, but are available for review outside of the referral.	BN
60			CO2	CO2 - Ability to sort referrals by date and record completed referral dates	Complete/Fully Functional (In Production)	Luz Marquez	Student referral report depicts "Action Taken", and Referral search (Admin-Referral Search) will also show any referrals with or without Actions Taken. In both cases, presentation of referrals is in date sequence.	BN
60	Area: Counseling	x	CO2, CO11, CO12, CO14, CO15, CO7, D5	Referral and Service Coordination	D5 Planned	Luz Marquez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
60			D5	D5- (School Staff) Monitor expulsion recommendations	Planned	Luz Marquez	There is a separate system that tracks this information outside of MISIS, the District Expulsion System. Integration? Alerts?	BN
61			AT18	AT18-Call log	Complete/Fully Functional (In Production)	Luz Marquez	Renamed to "Contact Log", accessible on the student's profile (just below the student's photo)	BN
61			SST1	SST1 - Student study team	Complete/Fully Functional (In Production)	Luz Marquez	The SST screens were replaced by the Student Support and Progress Team (SSPT) screens. These combine the existing functions for the Coordination of Services Team (COST), Student Study Team (SST), and Language Appraisal Team (LAT). Profile-Support-SSPT Referral.	BN
61			SST3	SST3 - View SST information online	Complete/Fully Functional (In Production)	Luz Marquez	The SST screens were replaced by the Student Support and Progress Team (SSPT) screens. These combine the existing functions for the Coordination of Services Team (COST), Student Study Team (SST), and Language Appraisal Team (LAT).	BN
61			SST2	SST2 - Online forms	Planned	Luz Marquez	The SSPT reports are part of the Student Support BSR which will be delivered by the end of November 2016. Some links to create meeting details (for the SSPT team) are broken (as of 11/8/2016). Luz is submitting trouble ticket. Reports in support of this process are scheduled to be done by 1/18/2017. Business owner apparently did not ask for Parent letters to be system generated or tracked.	BN
61	Area: Counseling	x	SST3, 5046 (s/b SST1 and SST2), AT18	SST Assessment and Follow-up	SST2 Planned	Luz Marquez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
62		x	E1	Students Transitioning to Alternative Schools	Complete	Elizabeth Louros	Clumsy navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this. Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
62			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (In Production)			BN
63		x	INT2	Support for AEW/C Students	Complete	John Davey	AEWC Students are tracked in the Adult Students Information System (ASIS). The information is loaded directly to CALPADS, and student enrollment is tracked in the district locator. Update 6/1/2017 - Robert Pelayo followed up, and the AEW/C program is gone, but replaced by Accelerated College and Career Transition program (AC2T). Attendance in the AC2T program is done only in the adult schools, using the Adult SIS. Any completed classes in this program should be available in the MISIS transcript, per Robert. Once it is proven that all courses completed by Adult students make it to the MISIS transcript, this item will be deemed satisfied. Update 20190215: Per MISIS PM, DACESIS will share the transcript data for all students via IODS. Household Hub will issue District IDs to all Adult School students. DACESIS has an ETA of June 2019.	BN
64			A3	A3 - Record and certify Hourly Positive attendance (status and reason codes)	Complete/Fully Functional (In Production)	Luz Marquez		BN
64			ST3	ST3 - Submit Statistical Report extract for principal apportionment	Planned	Luz Marquez	This is planned for the end of 2016-17 School Year. Plan revised to target April, 2018. Update 20190213: The plans for meeting the ST2 and ST3 requirements were abandoned for 3 reasons: (1) the State does not support the electronic submission of statistical data (2) the level of effort to provide the functionality in MISIS was significant and deemed moot once reason #1 was confirmed and (3) the Business Owners are content with the current processes.	N/A
64		x	ST3, A3	Work Experience Information Capture	ST3 Planned	Luz Marquez	Not sure how ST3 would relate to this item, if at all.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
65			D1	D1 - Create/update student discipline referrals	Complete/Fully Functional (In Production)	Luz Marquez		BN
65		x	D6, D1	Capture Student Behavior and Discipline Information	D6 Planned	Luz Marquez		BN
65			D6	D6 - (Central Office) Provide Expulsion case management functionality	Planned	Luz Marquez	This has been deemed obsolete. There is a standalone system employed, with an interface from MISIS. Luz will send the rules document for what gets displayed in MISIS to Bob.	BN
66		x	D9, D10	Early Education Suspension/Expulsion Alert	Complete	Robert Pelayo	Robert Pelayo will follow up to see what happens with suspensions/expulsions from Early Ed Centers. Update 5/10/2017 - Robert will ask how kids with behavioral issues are handled. Referral for outside services? Update 2/8/18 - After discussion with IM, we've agreed to mark this as no longer applicable. District policy does not acknowledge suspensions/expulsions for early education students.	N/A
66			D10	D10 - block enrollment	Complete/Fully Functional (In Production)	Luz Marquez	Data interfaced from Expulsion system accomplishes this.	BN
66			D9	D9 - Mandated reporting of certain student behaviors	Complete/Fully Functional (In Production)	Luz Marquez	For the purpose of notifying teachers and administrators about student behaviors, there is an indicator on the student's profile if any incidents have been recorded. Then the user can view all referrals (Support-Referrals). For annual reporting to the CDE, ODA uses data from MISIS to compile the report in another system. Need follow up on this. Reporting should be directly from MISIS.	BN
67			D1a	D1a - Incident History screen	Complete/Fully Functional (In Production)	Luz Marquez	Support-Referrals	BN
67			D1c	D1c - Summary Page	Complete/Fully Functional (In Production)	Luz Marquez	There is an inline report called the "Referral Form" that displays a summary of all data for an incident.	BN
67			D2	D2 - Monitor individual and school-wide referrals and responses via application and reports.	Complete/Fully Functional (In Production)	Luz Marquez		BN
67		x	D6, D1a, D1c, D2	Online Access to Student Behavior Information	D6 Planned	Luz Marquez		BN
67			D6	D6 - (Central Office) Provide Expulsion case management functionality	Planned	Luz Marquez	This has been deemed obsolete. There is a standalone system employed, with an interface from MISIS. Luz will send the rules document for what gets displayed in MISIS to Bob.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
68		x	WELLIGENT	Special Education Discipline Activities				
69		x	E20 a-n, E19	Application for Extracurricular Activities	Complete			
69			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
69			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
69			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
69			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
69			E20C	E20c (District Ath. Director) - Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
69			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN
69			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN
69			E20F	E20f -(School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
69			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN
69			E20H	E20h -(School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
69			E20I	E20i - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez		BN
69			E20J	E20j - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
69			E20K	E20k (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
69			E20L	E20l - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
69			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
70		X	E20 a-n, E19	Approvals for Extracurricular Activities	Complete			BN
70			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
70			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
70			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
70			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
70			E20C	E20c (District Ath. Director)- Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
70			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN
70			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN
70			E20F	E20f -(School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
70			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
70			E20H	E20h - (School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN
70			E20I	E20i - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez		BN
70			E20J	E20j - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
70			E20K	E20k (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
70			E20L	E20l - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
70			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
71		x	E20 a-m, E19	Capture Student Participation Information for Extracurricular Activities	Complete			BN
71			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
71			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
71			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
71			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
71			E20C	E20c (District Ath. Director) - Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
71			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN
71			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
71			E20F	E20f - (School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
71			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN
71			E20H	E20h -(School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN
71			E20I	E20i - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez		BN
71			E20J	E20j - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
71			E20K	E20k (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
71			E20L	E20l - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
71			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
72		X	E20 a-n, E19	Support Services for Extracurricular Activities	Complete			BN
72			E19	E19 - Manage non-athletic groups	Complete/Fully Functional (In Production)	Mary Lu Camacho	Changes to this process scheduled to be delivered 10/18.	BN
72			E20	E20 - Manage athletic groups at the District level (District Athletic Director)	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
72			E20A	E20a - (District Ath. Director) Create secure District level groups for athletic teams, based on eligibility rules and eligibility documents	Complete/Fully Functional (In Production)	Luz Marquez	An OAT script for the new school year groups is created at the end of each school year.	BN
72			E20B	E20b - (District Ath. Director) Duplicate District created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
72			E20C	E20c (District Ath. Director)- Publish District created groups for schools to copy	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
72			E20D	E20d - (School Athletic Director) Copy applicable District created groups to school and add any additional school specific rules or documents	Complete/Fully Functional (In Production)	Luz Marquez	District-created athletic groups are automatically pushed to schools, but schools can then add school specific rules that are more strict than the District rules.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
72			E20E	E20e - (School Athletic Director) Create new school defined groups with user defined eligibility rules and documents	Complete/Fully Functional (In Production)	Luz Marquez	There is no current capability to create a new, school-based athletic team that isn't one of the sanctioned sports identified at the District level. Any others, though, could be created as an Activity Club, with similar rules and documents for eligibility.	BN
72			E20F	E20f - (School Athletic Director)-duplicate District and school created groups as needed	Complete/Fully Functional (In Production)	Luz Marquez		BN
72			E20G	E20g -(School Athletic Director)-Associate school staff to groups (access to view and/or edit data)	Complete/Fully Functional (In Production)	Luz Marquez		BN
72			E20H	E20h -(School Athletic Director)-Add (and remove) students to groups, individually or by class	Complete/Fully Functional (In Production)	Luz Marquez	needs further review. Not working properly as of 10/18. Update - systems allows the additions, although it is flawed, because it allows adding a student who is not eligible to an athletic group. Why bother with the eligibility rules?	BN
72			E20I	E20i - (School Athletic Director)-Calculate eligibility on demand and generate the reports: Rosters, Certificate of Athletic Eligibility, Athletic Eligibility Checklist, and Ineligible Athlete Parent Letter	Complete/Fully Functional (In Production)	Luz Marquez		BN
72			E20J	E20j - (School Athletic Director)-enters waiver into system for ineligible student when District Athletic Director approves it	Complete/Fully Functional (In Production)	Luz Marquez	Obsolete. All OAT groups are automatically pushed to all secondary schools.	BN
72			E20K	E20k (District Athletic Director) - View log to see which groups have been copied to a particular school	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
72			E20L	E20l - All athletic groups are year specific and are saved so can duplicate as needed.	Complete/Fully Functional (In Production)	Luz Marquez	Done by Spreadsheet submission, and then software developer intervention annually	BN
72			E20M	E20m (System Administrator) - Send system message to all users with [school] Athletic Director	Complete/Fully Functional (In Production)	Luz Marquez	Update 20190208: There is a new system announcement tool in MISIS that allows messages to be delivered to users by role. This tool satisfies the requirement, and messages appear on the MISIS "landing" page upon signon.	BN
73	Area: Health	x	H1, H2, H3, H4, H10, H3A,H3B	Capture Student Information for Health Activities	Complete			BN
73			H1	H1 - Enter TB Screening and X-ray dates and results	Complete/Fully Functional (In Production)	Elizabeth Louros	Entered in MISIS screen by school office personnel. Data are stored in Welligent, via the same API as for Immunizations. Info is part of enrollment packet.	BN
73			H10	H10 - Interface with Welligent	Complete/Fully Functional (In Production)	Elizabeth Louros	Significant changes pending	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
73			H2	H2 - Enter Immunization dates and exemption dates and reasons	Complete/Fully Functional (in Production)	Elizabeth Louros	API to Welligent goes down frequently. Data are then kept in temporary tables, and processed as soon as the API is back up. With multiple storage systems for Immunization data (MISIS, Welligent, CAIR) and the same number of potential points of entry, need explanation and assurance of closed-loop reconciliation. <u>Update - 20170207: Initial entry of immunization data is in MISIS, and then sent to Welligent via the API. School nurses may administer some subsequent immunizations, but do not enter anything in MISIS or Welligent. They enter directly into the CAIR system. There is no current interface from CAIR back to Welligent.</u>	BN
73			H3	H3 - Oral Health Assessment and Waiver (Elem only)	Complete/Fully Functional (in Production)	Elizabeth Louros	Entered in MISIS screen by school office personnel. Data are stored in MISIS and then sent to Welligent, via interface. Info is part of enrollment packet.	BN
73			H3a	H3a - Physical Screening (only for sports)	Complete/Fully Functional (in Production)	Luz Marquez	Populated via interface from Welligent	BN
73			H3b	H3b-CHDP (Elem only)	Complete/Fully Functional (in Production)	Elizabeth Louros	Entered in MISIS screen by school office personnel. Data are stored in MISIS and then sent to Welligent, via interface. Info is part of enrollment packet.	BN
73			H4	H4 - Enter Opt out code for Condom Distribution Program (CDP)	Complete/Fully Functional (in Production)	Elizabeth Louros	Entered in MISIS screen by school office personnel. Data are stored in MISIS and then sent to Welligent, via interface. Info is part of enrollment packet.	BN
74	Area: Health	x	H10	Health Integration Points Processes	Complete			BN
74			H10	H10 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Significant changes pending	BN
75	Area: Health	x	WELLIGENT	Health Recordkeeping (office visits, checklists, communication with parents, etc.)	Complete	Elizabeth Louros		BN
76			H7	H7 - Review health alert	Complete/Fully Functional (in Production)	Elizabeth Louros	None in MISIS. An enhancement to correct this is scheduled for early May 2017. Update 5/3/2017 - MISIS now has an indicator displayed along with others, such as IEP, etc. When the user hovers over the indicator, the pop-up says "Health Concern."	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
76	Area: Health	x	H7, WELLIGENT	Ongoing Health Data Support Activities (including automatic notification to Special Ed Coordinator)				BN
77	Area: Health	x	H2, H10	Provide Health Exams / Immunizations	Complete			BN
77			H10	H10 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Significant changes pending	BN
77			H2	H2 - Enter Immunization dates and exemption dates and reasons	Complete/Fully Functional (in Production)	Elizabeth Louros	API to Welligent goes down frequently. Data are then kept in temporary tables, and processed as soon as the API is back up. With multiple storage systems for Immunization data (MISIS, Welligent, CAIR) and the same number of potential points of entry, need explanation and assurance of closed-loop reconciliation. <u>Update - 20170207: There is also a probable break in the process that is concerning. Initial entry of immunization data is in MISIS, and then sent to Welligent via the API. School nurses may administer some subsequent immunizations, but do not enter anything in MISIS or Welligent. They apparently enter directly into the CAIR system. There is no current interface from CAIR back to Welligent. So data can be different in all three systems.</u>	BN
78	Area: Special Education	x	WELLIGENT	Record Requests and Referrals				BN
79	Area: Special Education	x	SE1	Review Prior History (Referrals)	Complete		Not apparent, but if you drill into IEP history, you can see old referrals. It's just one at a time. Marian has identified a report that will be added to the IEP Reports group. It will display referral history for any student, once she adds Student to the report criteria. We will follow up once this is done.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
79			SE1	SE1 - Review special ed. summary information from Welligent via interface	Complete/Fully Functional (in Production)	Elizabeth Louros	Problems with current interface (multiple services for the same service type) Update 8/10/17: Problems with multiple services solved.	BN
80	Area: Special Education	x	WELLIGENT	Determine Assessment Needs				BN
81	Area: Special Education	x	WELLIGENT	Develop and Record Special Education Assessment Plan			Functionality exists, but is inefficient. There is a pending enhancement so that data wouldn't have to be entered twice. Timeline anticipates completion sometime after 6/30/17.	BN
82	Area: Special Education	x	WELLIGENT	Notify Service Providers			Functionality exists, but is limited to participation in an IEP meeting at this time. There is a pending enhancement for automatic assignment and notification. Timeline anticipates completion by 6/30/17. FAPE Automation will complete this, and is in pilot mode with intended full rollout for Fall 2017.	BN
83	Area: Special Education	x	WELLIGENT	Conduct Assessments and Prepare Assessment Reports				BN
84			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
84	Area: Special Education	x	SE7, WELLIGENT	Identify IEP Participants				BN
85			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
85	Area: Special Education	x	SE7, WELLIGENT	Schedule IEP Meeting and Notify IEP Participants			Welligent/Internal participants are notified via internal Welligent messaging. For parents, schools follow a manual notification process, but record each attempt and/or response on a form in Welligent. If there are other external participants, it is up to the parents to notify them.	BN
86			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
86	Area: Special Education	x	SE7, WELLIGENT	Conduct IEP Meeting and Record Results				BN
87			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
87	Area: Special Education	x	SE7, WELLIGENT	Transition Planning			There are 3 separate ITP pages. When the student has reached age 14, the pages become required.	BN
88	Area: Special Education	x	Exclusions from Modified Consent Decree (MCD) ISIS Checklist on May 20, 2011	Parents/Community Advisory Committee	Obsolete			N/A
89			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (in Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
89	Area: Special Education	x	WELLIGENT, SE7	Place Students for Services			FAPE 1 form	BN
90	Area: Special Education	x	S39	Assign Trainees/Assistants (classroom aides)	Complete		School users use the section attributes feature to add a paraprofessional to a section. It doesn't appear as if paraprofessionals can be assigned to individual students. It seems as if this is limited to assigning them to a class.	BN
90			S39	S39 - Add paraprofessionals to the Master Schedule	Complete/Fully Functional (in Production)	Mary Lu Camacho	School users use the section attributes feature to add a paraprofessional to a section. It doesn't appear as if paraprofessionals can be assigned to individual students. It seems as if this is limited to assigning them to a class.	BN
91	Area: Special Education	x	WELLIGENT	Assign DIS Service Providers			Pending FAPE Automation will be piloted starting 4/1/17. This will automatically create service records (based upon what is entered in the IEP FAPE pages) and assignments to specific providers following criteria such as location, caseload, role, previous experience with student, etc. Until this is fully implemented, this is a manual process, done by Related Service coordinators, case managers, etc.	BN
92	Area: Special Education	x	C23A, E1	Make Transportation Arrangements	Complete		Special Ed Placement Portal is scheduled for deployment on May 3, 2018. Update 6/8/18: Need follow up and demo of this. Robert Pelayo?? 20190212: Developed as an integrated module to MISIS. Live in system.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
92			E1	E1 - Enter initial or transfer student enrollment information	Complete/Fully Functional (In Progress)	Elizabeth Louros	Cummys navigation, doesn't match forms in enrollment packet. I also need to view transcript functions to sign off on this one. UX Sketch #8 should address this. Update 20190212: Basic functionality is satisfied, albeit inefficiently. In 2019-20 school year, new enrollment form changes will drive revision, with enhanced navigation at that time.	BN
92			C23A	Interface with Traveler's System	Complete/Fully Functional (In Progress)	Elizabeth Louros	William He's system managed by Transportation office. The Transportation screen used in Welligent sends data to MAPNet, which then sends data to Traveler's system, and it is then interfaced into MISIS as part of the nightly process. There is desire to offer the same screen in MISIS, as for Magnet students and others, the transportation indicator on the MISIS enrollment screen triggers an evaluation done by users of Travelers system. If their evaluation indicates eligibility for transportation, then MAPNet gets notification. Then routing info goes back to MISIS. This is kind of a mess. UPDATE 20180411: Discussion will be scheduled for next week.	BN
93			S9	S9 - Analysis of Reports	Complete/Fully Functional (In Progress)	Mary Lu Camacho		BN
93	Area: Special Education	X	S9, WELLIGENT	Monitor Service Delivery and Student's Progress			There is a section called IEP Report of Progress and Achievement From Current IEP on page 5 of the IEP that suggests documentation of each goal's progress 4x/year, and let's the parents know that they will receive updates. Policy indicates that progress reporting should be done on the same frequency as report cards.	BN
94		X	WELLIGENT	Least Restrictive Environment: Collaborative Models			Available to document the expected model in the IEP, and then it is propagated into the individual service records/sessions.	BN
95		X	WELLIGENT	Collect Service Data				BN
96		X	WELLIGENT	Prepare Service Data for Medi-Cal Billing				BN
97		X	WELLIGENT	Establish/Confirm Medi-Cal Eligibility				BN
98		X	WELLIGENT	Bill California DHS for Medi-Cal Reimbursements				BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
99		X	WELLIGENT	Record Due Process Requests and Resolve Issues			Process may start with Call Center events and Informal Dispute Resolution (IDR). These used to be documented in the Complaints Management module, and would be viewable to the Due Process manager. Now the Due Process person has to view details in the Call Center module instead.	BN
100		X	WELLIGENT	Record Due Process Results; Notify School for Implementation or Resolve Issues			Documentation of Due Process results is contained in Welligent. For notification to schools, though, forms may be generated from the Complaints Mgmt module, but notification is manual. Also, there is no capability in the Complaints Management module to create an Implementation IEP. Eulecia will follow up with DP office on how best to deal with notifications and/or auto-creation of implementation IEP. 4/19/2017. Update - Series of alerts to create notifications is in QA. Eulecia will demo once QA is done.	BN
101		X	WELLIGENT	Follow-up with School for Confirmation of Implementation			No current functionality. In-house effort underway to create a series of alerts pertaining to the DP event. Review again prior to 6/30. Update 5/3/17 - Team is going to create another alert that will examine whether or not an IEP has been created/completed within the 15-day timeline.	BN
102		X	WELLIGENT	Record Reimbursement Requests and Payment Authority			Requests are documented in the Complaint Management module. Invoices, if for attorney fees, are sent to DP Office, then apparently forwarded to OGC. OGC enters the appropriate data after the fact - from data in their external case management system.	BN
103		X	WELLIGENT	Notify Accounts Payable for Payments or Resolve Issues			This notification seems to be done manually, by OGC. Eulecia will follow up on this process, and then update me. OGC manages this activity in their external case management system. They do enter the date AP is notified back into Welligent.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
104		X	WELLIGENT	Manage Special Education Classes and Class Norms			This is done in the Welligent Classroom Management module. Marian will get back to me regarding norming process and supporting reports. MISIS Ad Hoc Norm Dashboard consolidates general ed data with the Caseload (SESAC Teacher) managers. The only outstanding issue is how to identify the number of classroom aides required - as of 4/10/17. Subsequent discussion agreement that if the Division's fiscal services group thinks they have all they need to manage paraprofessionals assignments, I will approve this one. Confirmed by Marian Mason 4/26/2017.	BN
105		X	WELLIGENT	Manage Service Provider's Caseloads (DIS)				BN
106		X	WELLIGENT	Manage NPS/NPA Contracts/SAs				BN
107		X	WELLIGENT	Track NPS/NPA Providers' Credentials				BN
108		X	WELLIGENT	Process NPS/NPA Invoices				BN
109		X	WELLIGENT	Monitor Timelines for Compliance				BN
110		X	WELLIGENT	Monitor Services Delivery for Compliance			Providers - My Caseload (including alerts) Monthly Service Log report; Welligent alerts at signon; Today at a glance display on signon Supervisors - Supervisor Review screen (for session notes); Staff Caseload (under Wellsupervisor); a variety of reports showing student detail. No aggregate view of all providers' performance/compliance Coordinators - There are a series of reports available (in the SER series) that enable evaluation of performance, case management, and communication follow up. There is even an SER300Z (2651) report that shows how many times a provider has run the SER monitoring reports.	BN
111		X	WELLIGENT	Track Supporting Documents, Including Contracts				BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
112		X	WELLIGENT	District Review Process			Does not exist in Welligent at this time. Supported by an external FM Pro system. Marian will send document. Update 20171208: District will go forward with this enhancement, with targeted go-live of 12/2018. Update 20180608: work order approval took too long, so go-live is now targeted for March, 2019. Update 20190212: CDE will no	N/A
113		X	WELLIGENT	Various reports required (including state mandated, coordinated compliance review, Principal's and Superintendent's reports, District Validation Review, etc.)			CASEMIS reporting - most external sources have been blended into Welligent tables. 1 or 2 still remain. Implementing Certify for Welligent might reduce some additional data cleanup activities. MCD Outcome reports work for compliance reviews as well. DVR support document coming from Marian. New target for DVR is 12/2018. Go-live is targeted for March, 2019.	BN
114			H8a	H8a - Use indicator to monitor 504 eligible students who do not have 504 plans	Complete/Fully Functional (In Production)	Elizabeth Louros	The Section 504 Accommodation report can be exported to Excel, and this analysis, along with many others can be accomplished. MISIS Ad Hoc reporting, and Welligent reporting can also accomplish this.	BN
114			SE1	SE1 - Review special ed. summary information from Welligent via interface	Complete/Fully Functional (In Production)	Elizabeth Louros	Problems with current interface (multiple services for the same service type) Update 8/10/17: Problems with multiple services solved.	BN
114			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (In Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
114		X	WELLIGENT, SE1, SE7, H8a	Requests for Accommodations				BN
115			H8a	H8a - Use indicator to monitor 504 eligible students who do not have 504 plans	Complete/Fully Functional (In Production)	Elizabeth Louros	The Section 504 Accommodation report can be exported to Excel, and this analysis, along with many others can be accomplished.	BN
115			SE1	SE1 - Review special ed. summary information from Welligent via interface	Complete/Fully Functional (In Production)	Elizabeth Louros	Problems with current interface (multiple services for the same service type)	BN
115			SE7	SE7 - Interface with Welligent	Complete/Fully Functional (In Production)	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
115		X	WELLIGENT, SE1, SE7, H8a	Evaluations / Meetings				BN
116			H8a	H8a - Use indicator to monitor 504 eligible students who do not have 504 plans	Complete/Fully Functional (In Production)	Elizabeth Louros	The Section 504 Accommodation report can be exported to Excel, and this analysis, along with many others can be accomplished.	BN
116			SE1	SE1 - Review special ed. summary information from Welligent via interface	Complete/Fully Functional (In Production)	Elizabeth Louros	Problems with current interface (multiple services for the same service type) Update 8/10/17: Problems with multiple services solved.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
116			SE7	SE7 - Interface with Welligent	Planned	Elizabeth Louros	Done via daily batch interface, not APIs. Not accomplishing integration. Significant changes pending	BN
116		x	WELLIGENT, SE1, SE7, H8a	504 Plan Generation				BN
117	Area: School Management and	x	Annual Program Survey	Synchronization	Complete/Fully Functional (In Production)	Elizabeth Louros	If this is referring to CALPADS, then we fulfill this requirement because CALPADS can retrieve data directly via our database and request for additional data. CALPADS pulls data from MISIS, and the Office of Data and Accountability does the annual program survey. This is a questionable approach. Why does there need to be another external system to MISIS?	BN
118	Related Services(NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from	x	Financial Planning	Synchronization	Complete/Fully Functional (In Production)	Sofia Hernandez	If this is referring to E-Cast or State Reports, then we fulfill this requirement as we have reports for both of these. Additionally, there is a MISIS interface that sends statistical, classification, E-Cast information to IODS and ACES. Update 20180411: Accomplished via Enterprise Reporting dashboards	BN
119	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an external enabling system. It is not expected that ISIS will contain modules to	x	Manage Equipment	Synchronization	Complete/Fully Functional (In Production)	Oliver Hament	Schools put information into an Online Computer Database. Schools can access that data and validate whether or not the equipment is in their possession/ location of the asset. MEM-4170.5 gives a link with a single sign on and each district site is responsible for conducting annual site inventory. At ITI schools, they are starting to use DESTINY to track the devices, which allows the schools to assign the device. Student data in DESTINY is synced up with MISIS nightly. That allows a school to check a device out the student. Update 20190215: Per MISIS PM, MISIS is working with Destiny vendor (Follett) to create a new alert on the Student Profile to appear if and when a student has an outstanding balance. The alert will direct the user to check Destiny for details. MISIS will not store dollar amounts or information on the device(s). ETA June 2019.	

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
120	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an external enabling system. It is not expected that ISIS will contain modules to cover all of	x	Manage School Cafeteria	Synchronization - CMS	Complete/Fully Functional (In Production)	Sofia Hernandez	MISIS retrieves data from CMS, but CMS gets data from IODS. Through an interface, MISIS sends data to CMS, through IODS. MISIS also receives data from CMS directly. This is a confusing description. It reads as if this is a messy relationship. Update 20180409: There are apparently only 4 data items pertaining to the school cafeteria stored in MISIS. They are Current Meal Code, Prior Meal Code, Lunch Code Start Date, and Letter Sent to Parent. The Horizon software system was implemented approximately 7 years ago. It supports menu planning, ordering, scheduling, production/serving records, student eligibility and POS functionality.	BN
121	Related Services (NOTE: These are, for the most part, business processes that	x	Manage School Libraries	Synchronization - DESTINY	Complete/Fully Functional (In Production)	Sofia Hernandez	Data from MISIS is sent to IODS, which then sends the data to DESTINY. No link to MISIS indicating if student still has textbooks outstanding. So a student could conceivably have not returned books and still go through graduation.	BN
122	Related Services (NOTE: These are, for the most part,	x	Manage Schools	Synchronization - LOCNX	Complete/Fully Functional (In Production)	Sofia Hernandez	If this is referring to LOCNX, we get a list of all schools and all their attributes from LOCNX. Data is loaded into MISIS for schools, campuses, and local districts.	BN
123	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either	x	Manage Teachers	Synchronization - BASE	Complete/Fully Functional (In Production)	Sofia Hernandez	This group gets data from HRWega, which has an interface with MISIS. Update 20180411: This can be satisfied if differential assignment data is displayed on the Staff Information screens in MISIS. Update 20190208: A more difficult problem to solve is that not all differential assignments are communicated to HR in a timely way, which means they would not appear in this display.	BN

Item	Business Process / Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
124	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an	x	Manage Textbooks	Synchronization - DESTINY	Complete/Fully Functional (In Production)	Sofia Hernandez	Data from MISIS is sent to IODS, which then sends the data to DESTINY. No link to MISIS indicating if student still has textbooks outstanding. So a student could conceivably have not returned books and still go through graduation. Update 20190215: Per MISIS PM, MISIS is working with Destiny vendor (Follett) to create a new alert on the Student Profile to appear if and when a student has an outstanding balance. The alert will direct the user to check Destiny for details. MISIS will not store dollar amounts or information on the device(s). ETA June 2019.	
125	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an	x	Master Plan Program Survey	Synchronization - CALPADS	Complete/Fully Functional (In Production)	Sofia Hernandez	If this is referring to CALPADS, then we fulfill this requirement because CALPADS can retrieve data directly via our database and request for additional data. CALPADS pulls data from MISIS, and the Office of Data and Accountability does the master plan program survey.	BN
126	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an external enabling system. It is not expected that ISIS will contain modules to cover all of these processes.)	x	Planning and Demographics	Synchronization - MP&D	Complete/Fully Functional (In Production)	Sofia Hernandez	MISIS gets files directly from MP&D and give files directly to them. There is an inbound and outbound interface with MP&D.	BN
127			P1	P1 - Define program definitions	Complete/Fully Functional (In Production)	Elizabeth Louros	Included in Sketch 2930C. Updated 3/1/2017	BN
127	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in ISIS or by an interface from ISIS to an external enabling system. It is not expected that ISIS will contain modules to cover all of these processes.)	x	E7, P1	Title 1 Programs	E7 Partially Complete	Elizabeth Louros		BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
127			E7	E7 - Identify and monitor Title 1 students	Partially Complete/Partially Functional (In Production)	Elizabeth Louros	Sketch for this function for Targeted Assistance Program has been put on hold, since there are only a few schools. All that is needed is to populate a list of values for Service Type.	BN
128	Related Services (NOTE: These are, for the most part, business processes that may be satisfied either directly in SIS or by an interface from SIS to an external enabling system. It is not expected that SIS will contain modules to cover all of these processes.)	X	C23, C23A	Capture Transportation Data for Interface	Complete			BN
128			C23	C23 - View student's transportation information	Complete/Fully Functional (In Production)	Elizabeth Louros	Process for collecting and disseminating data is very flawed, but MISIS does display transportation information. Updated 3/1/2017	BN
128			C23A	C23A- Interface with Traveler's System	Complete/Fully Functional (In Production)	Elizabeth Louros	Flawed interface design (or functional design) for this. Transportation Magnet code, for example, can be altered in both MISIS and in MAPNet and then overridden the next day via the interface. F-U with Elizabeth.	BN
129	Area: General	X	SS0	Role-based Access to Screens/Forms/Data	Complete/Fully Functional (In Production)	Robert Pelayo	MISIS application uses Single Sign On (SSO) via Active Directory. Access is role based. User must apply for one or several user roles to gain access to the screens and reports they need to complete their tasks. Target revisions for single profile with multiple roles is end of June, 2017. Update 20180411: The "Personalization" enhancement will satisfy this. Schedule pending. Update 20190215: OneAccess was implemented in November 2018 to simplify the role provisioning process. Auto-provisioning automatically assigns MISIS user roles (permissions) to employees based on their HR assignment (e.g., assigning the Teacher user role to teachers). A more cost effective solution was developed to default roles and capabilities. The ability to easily change roles if required has already been implemented in MISIS.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
130	Area: General	x	SA3	Ability to lock out data changes	Complete/Fully Functional (In Production)	Marie Reyes	1.Home Language Survey questions and Initial Language Classification fields are locked out after first update at the schools. Any future correction needs to be done by the ODA Testing Score User role in Central Office. 2.Test definitions can only be added by ODA Testing Score Administrator. Test scores can be entered at the school sites, but any corrections to tests entered and saved by school users can only be done by the ODA Testing Score User or GATE Administrator.	BN
131	Area: General	x	ST4, ST9, C17, AT15, C23A, CGA, C6B, INT5, T6, INT2, N2	Multiple electronic data interfaces to internal systems (SST, DSS, HR and Finance systems) and external entities (e.g. CSIS, CA DHS, LA County DMH)	Complete			BN
131			AT15	AT15 - Interface with ACES	Complete/Fully Functional (In Production)	Sofia Hernandez	Data are pushed only from MISIS to ACES. ACES should probably be a MISIS module. Update 20180411: Pending CALPADS capability to accept direct data loads. If that happens, then ACES can be retired.	N/A
131			C17	C17 - Update Caretaker contact information	Complete/Fully Functional (In Production)	Elizabeth Louros		BN
131			C23A	C23A- Interface with Traveler's System	Complete/Fully Functional (In Production)	Elizabeth Louros	Flawed interface design (or functional design) for this. Transportation Magnet code, for example, can be altered in both MISIS and in MAPNet and then overridden the next day via the interface. F-U with Elizabeth.	BN
131			CGA	Cga - Interface with Meal Compliance System	Complete/Fully Functional (In Production)	Elizabeth Louros	Nightly interface from CMS accomplishes this. Data are displayed under Census-Meal Code.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
131			INT2	INT2- Support for AEW/C Students	Complete/Fully Functional (in Production)	John Davey	AEWC Students are tracked in the Adult Students Information System (ASIS). The information is loaded directly to CALPADS, and student enrollment is tracked in the district locator. Update 6/1/2017 - Robert Pelayo followed up, and the AEW/C program is gone, but replaced by Accelerated College and Career Transition program (AC2T). Attendance in the AC2T program is done only in the adult schools, using the Adult SIS. Any completed classes in this program should be available in the MISIS transcript, per Robert. Once it is proven that all courses completed by Adult students make it to the MISIS transcript, this item will be deemed satisfied. Update 20190215: Per MISIS PM, DACESIS will share the transcript data for all students via IODS. Household Hub will issue District IDs to all Adult School students. DACESIS has an ETA of June 2019.	
131			N2	N2 - Staff information - Credentials Number of Years on site, Number of Years with the District, Differentials (Coordinator, Athletics, Supplemental), Coordinatorship (e.g., Title I)	Complete/Fully Functional (in Production)	Robert Pelayo	HR Megafire interface brings data into MISIS (via IODS), but there is no view of differential assignments. Update 20180406: There also does not seem to be any way to search for or find individuals assigned to specific roles (e.g. GATE Coordinator)	BN
131			ST4	ST4 - Provide data elements required for CALPADS reporting	Complete/Fully Functional (in Production)	Elizabeth Louros	School Information Branch extracts data out of MISIS to submit file to CALPADS. 3 CALPADS exception reports that we provide to allow schools to clean-up data. (demographics, ELAS-English Language Assessment Status- Report, Enrollment Clean-Up). Schools can run those 3 reports through MISIS to detect any discrepancies. Need follow up with Elizabeth (CALPADS BSR). Update 20180411: Robert will confirm that Certify rules have now replaced need for cleanup reports.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
131			ST9	ST9 - Provide CARS (Consolidated Application and Reporting System) formerly known as CONAPPS	Complete/Fully Functional (in Production)	Elizabeth Louros	Preparation of the reports is completed by the Office of Data and Accountability (ODA), but MISIS provides ODA with the data. Call Saul Fernandez in ODA to explore whether this is an interface or direct read of MISIS tables. Data may also come from IODS. This doesn't need to go through an external system (same for CALPADS reporting, especially since rules have been constructed in Certify to correct data issues). Need to follow up with Robert Pelayo.	BN
131			T6	T6 - Nightly interface test results and performance level via SST.	Complete/Fully Functional (in Production)	Marie Reyes	One approach for all test results would be desirable. Instead of multiple modes of data collection (IODS, SST, directly to MISIS) Update 20180411: Robert will document revised flow. That may satisfy this requirement.	BN
131			INTS	INTS - Interface Between MISIS and SchoolMax	Complete/Fully Functional (in Production)	Sofia Hernandez		N/A
132	Area: General	x	G22,D3	Multi-lingual Capabilities	Complete		In process for CA content standard report cards	BN
132			D3	D3 - (School Staff) Generate Discipline notification letters	Complete/Fully Functional (in Production)	Luz Marquez		BN
132			G22	G22 Ability to print the entire report card in multiple languages including canned comments	Complete/Fully Functional (in Production)	Frank Ramirez	Prints in Student's home language for supported languages (English and Spanish are the only ones available for Secondary students. For elementary students, Korean, Armenian and Chinese are also available officially. Unofficially, Russian, Vietnamese, Tagalog are also still included, because the translation previously existed. As soon as anything changes, these will be gone, unless additional translations are acquired.). In process for CA content standard report cards	BN
133	Area: General	x	MISIS REPORT EXPORT STANDARDS [EXCEL, PDF, WORD]	Report Delivery Employing Multiple Media	Complete			BN
134	Area: General	x	ARI	Ad-hoc Reporting	Partially Complete	Mary Lu Camacho	MISIS Reporter is in place, with some functionality. It is being replaced with new Enterprise Reporting tool, including Dashboards and Ad Hoc report creation. 1st phase of ad hoc implementation is week of 11/1/16. New tool needs to allow queries combining multiple business areas. Special Ed summary data will be introduced on 3/21/2017, but not other Welligent data - yet. Update 20180406: waiting for expansion to include all Welligent data.	BN
135	Area: General	x	ST4, ST2	Comparative and Longitudinal Reporting	Complete			BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
135			ST2	ST2 - Generate and certify Statistical Report	Complete/Fully Functional (In Production)	Luz Marquez	Reporting interface/generation is in place, but online certification is pending development (targeted for late Spring, 2017). Update	N/A
135			ST4	ST4 - Provide data elements required for CALPADS reporting	Complete/Fully Functional (In Production)	Elizabeth Louros	School Information Branch extracts data out of MISIS to submit file to CALPADS. 3 CALPADS exception reports that we provide to allow schools to clean-up data. (demographics, ELAS-English Language Assessment Status- Report, Enrollment Clean-U/p). Schools can run those 3 reports through MISIS to detect any discrepancies. Need follow up with Elizabeth (CALPADS BSR). Update 20180411: Robert will confirm that Certify rules have now replaced need for cleanup reports.	BN
136				FC1 - Integrate Family Data	Complete/Fully Functional (In Production)	Luz Marquez	There is no integration of Family data. This is a bit of a dilemma. Even though there are places in the system that might make the user think that connections are made between siblings, they are not. For example, the "Twins" flag in enrollment doesn't connect the student to any other student's record. Similarly, if a SARB process is begun, there is no prompt available to identify siblings. The user must search students at the same address instead, if they think of it. Update 20180406: New initiative called Household Hub should address this. Need design details and timeline. Update 20190212: Development nearly complete. Implementation pending address verification initiative. Targeted by June, 2019.	
136	Area: General	x	FC1	Parents Module	Partially Complete		20180409: This can be signed off once teacher utilization of Gradebook is near 100%, and critical mass is reached for parents participating.	BN

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
137			FC1	FC1 - Integrate Family Data	Complete/Fully Functional (in Production)	Robert Pelayo	There is no integration of Family data. This is a bit of a dilemma. Even though there are places in the system that might make the user think that connections are made between siblings, they are not. For example, the "Twins" flag in enrollment doesn't connect the student to any other student's record. Similarly, if a SARB process is begun, there is no prompt available to identify siblings. The user must search students at the same address instead, if they think of it. Update 20180406: New initiative called Household Hub should address this. Need design details and timeline. Update 20190212: Development nearly complete. Implementation pending address verification initiative. Targeted by June, 2019.	
137	Area: General	x	FC1	Complaints Management Module		Robert Pelayo	Robert will follow up with Parent & Community Services branch. Update 20190215: Division of Special Education has implemented a process for the parents and students that they provide services to. The development of a parent help desk is in discussion. It would use Remedy.	
138			FC1	FC1 - Integrate Family Data	Complete/Fully Functional (in Production)	Robert Pelayo	There is no integration of Family data. This is a bit of a dilemma. Even though there are places in the system that might make the user think that connections are made between siblings, they are not. For example, the "Twins" flag in enrollment doesn't connect the student to any other student's record. Similarly, if a SARB process is begun, there is no prompt available to identify siblings. The user must search students at the same address instead, if they think of it. Update 20180406: New initiative called Household Hub should address this. Need design details and timeline. Update 20190212: Development nearly complete. Implementation pending address verification initiative. Targeted by June, 2019.	
138	Area: General	x	FC1	Workflow		Robert Pelayo	Enhancements to Enrollment screens/process will satisfy this. Update 20190215: Per MISIS PM, Enrollment screens, forms, and processes will be updated to improve efficiency and usability.	

Item	Business Process Area/Category	Roll up	MISIS Requirement	Major Subordinate Items or Processes	MISIS Requirement Status	Reviewer	Notes	Bob Neary Sign off
139			FC1	FC1 - Integrate Family Data	Complete/Fully Functional (in Production)	Robert Pelayo	There is no integration of Family data. This is a bit of a dilemma. Even though there are places in the system that might make the user think that connections are made between siblings, they are not. For example, the "Twins" flag in enrollment doesn't connect the student to any other student's record. Similarly, if a SARB process is begun, there is no prompt available to identify siblings. The user must search students at the same address instead, if they think of it. Update 20180406: New initiative called Household Hub should address this. Need design details and timeline. Update 20190212: Development nearly complete. Implementation pending address verification initiative. Targeted by June, 2019.	
139	Area: General	x	FC1	Contacts Management Module		Robert Pelayo	20180409: There is a capability to enter a contact record from the student's profile, but no apparent reporting or summary capability. Needs a little more work to explore this. Update 20180411: Demo to be arranged for related functionality and reports.	BN
			E12G	E12g - RFEP Monitoring Application Requirement	Complete/Fully Functional (in Production)	Marie Reyes	Function exists to capture dates, but will be removed, because EL coordinators are not using it. The RFEP Monitoring Roster and letter are used annually, however.	BN

Appendix D – MISIS Training and Support (per LAUSD)

Training

The need for MiSiS classroom training has decreased since the early implementation.

Current MiSiS training and support includes:

- Job/Training aids
- Videos and simulations
- Webinars
- Open Houses
- Live Demos
- FAQs and Common Questions
- Help Desk
- Support Website
- Live Chat
- Self-service via Knowledge Base articles

Classroom training is planned for personnel taking new roles/new employees and for some remedial training. Positions of emphasis include Front Office and Office Staff where MiSiS complexity is more prevalent.

Additionally, the MiSiS team continues to improve the user experience and streamline business activities on an ongoing basis. The goal is to simplify usage and make the system more intuitive.