



Pupil Accounting Enrollment Procedures

Introduction

This section of the handbook provides information for handling enrollment at the school site. In this section you will find:

- A task description of the major duties in enrollment.
- Daily Enrollment procedures
- Dropping and transferring students procedures
- Procedures for handling opening day enrollment.
- Month end procedures.
- Reports and reconciliation of reports.

Along with this information, you will need to refer to the Zangle User Guide, enrollment section and scheduling section. Refer to the following items: Administrative Procedures 6120 and 6123.

Because of the legal requirements associated with enrollment and attendance accounting, the district must be able to verify that all schools are following approved procedures. The instructions contained in this handbook must be followed at all schools sites that use the Zangle software. However, occasionally a site may have unique requirements that might justify some modification to the prescribed method. Any changes will require prior approval by Pupil Accounting and Internal Audit. The site principal must request the change in writing. Until an alternate procedure is given approval, you must not deviate from the standard process outlined in this handbook.

Task Description

The **ENROLLMENT** personnel function may include the responsibility of verify, inputting, and updating various items of information about every student enrolled at the school. Such information includes:

- demographic data (addresses, telephones, parent/guardian, and emergency contacts)
- age & birth date
- appropriate grade
- primary home language
- immunization status
- meal eligibility
- class/room assignments
- special needs
- entry or leave dates to/from another school or district
- enrolling into any of the various school programs

ENROLLMENT personnel are also responsible for completing and submitting specified reports to the central office. Depending on site staffing, personnel handling enrollment may share responsibility for attendance functions (e.g., updating student names on class rosters).

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November 2007



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Daily Enrollment Procedures

1. Before an enrollment packet is given to a parent/guardian for enrollment, inquire where the student resides and the address. Verify if residence is within school site boundaries on district website: <http://www2.sandi.net/jsbin/boundaries/lookup.html>
2. Parent/guardian must complete and sign the packet of forms for enrolling a student. Parent or guardian must be present in order for school to enroll a student. **ENROLLMENT** must check for accuracy and completeness of all enrollment forms which should include one of the following:
 - a) K-12 Student Enrollment forms which can be found in various languages at the following site <http://www.sandi.net/enrollment>
A Parent/Guardian signature is required (Ref. Procedure No. 6120) on the form. Ca Ed Code requires that the K-12 Student Enrollment form must be on file for each student in attendance and all cards must be kept in a lockable container.
 - b) Birth Certificate, refer to Admin. Procedure 6120. A photocopy of the birth certificate must be kept in the student's CUM file
 - c) California State Immunization Card: The California State Immunization Card must be kept in the student's CUM file.
 - d) Immunization certificate. A photocopy of the immunization certificate must be kept in the student's CUM file.
 - e) Physical examination certificate (first grade students). Due date for the form is Dec. 2nd of the current school year.
 - f) Verification of Address. A photocopy of the verification of residency must be kept in the student's CUM file. Education Code Section 48200 states, in part, that "Each person subject to compulsory full-time education... shall attend the public full-time school... in which the residency of either the parent or legal guardian is located and each parent, guardian, or person having control or charge of such pupil shall send the pupil to the public full-time school... in which the residence of either the parent or legal guardian is located."

The State Controller's Office has provided the district with the following information pertaining to State Compliance Requirements regarding residency.

State Residency

Only attendance of students who are valid residents of the state will be eligible for apportionment purposes. This requirement applies only to the state residency of the student. A student's legal status (citizenship, legality of U.S. residency) has no bearing on his or her eligibility to a free public school education in California. All students who are not residents of California are not eligible for apportionment, and the district must collect tuition for those students per Education Code Sections 48050, 48051, and 48052.

Evidence of residency may include, but is not necessarily limited to, the following:

- Photocopy of recent utility bill, water bill or cable bill



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- Photocopy of recent rental agreement, or mortgage documents
- Declaration of temporary residency affidavit in the case of homeless children
- If the parent of a student is living with a third party and resides within site boundaries, a Declaration of residency is required along with a photocopy of the proof of address.
- Military Housing Orders
- Approved district transfers

An ongoing attempt to obtain proof of residency should be documented and tracked. If the parent signs the Student Enrollment card and the address has not changed from the previous year, no other proof is necessary. If the address changes, then new documentation must be obtained and put in the students CUM folder.

The documents listed below do not meet the District's proof of residency requirements:

Driver's License (parent's)	Bank statements	Credit card bills
Cellular phone bills	Magazine subscriptions	

7. Inquire if the student receives special education services. If the answer is yes and the student is from out of the district, ask the parent for a copy of the IEP or consent of records request. Include in the enrollment packet a request pertaining to special needs of the student, i.e., special education, GATE, language needs, etc. This will assist in getting the student placed in the proper classroom.
8. Complete the SCHOOL/OFFICE USE ONLY portion of the K-12 Enrollment card to obtain the following information and RES LOC code.

ENROLLMENT Clerk should be familiar with all enrollment codes and terminology used, and Enrollment procedures before enrolling students in the Zangle system, refer to the **Zangle User Guide, Enrollment Handbook** for the correct information. A brief explanation of the importance of the codes are listed below.

Enter Codes

Each student enrolled must have an ENTER CODE and an ENTER DATE, the date and enter code should match on the Enrollment card and the ZANGLE system. The ENTER DATE is the first actual day of attendance at the site.

The ENTER DATE in ZANGLE will always default to the current date. Please verify that the correct enter date is entered into the system. Remember that Average Daily Attendance (ADA) is calculated based upon the ENTER DATE. Each day of attendance is valued at approximately \$32.15. Correct ENTER DATES are extremely important to the district and for an accurate account of the student's record.

ADA Codes



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Average Daily Attendance (ADA) calculations are reported to the state three times each year. The calculations are based upon specific state requirements and it is the ADA code that enables the district to accurately report ADA to the state. Refer to the Zangle User Guide, Enrollment, Program codes and Programs from other Attendance Categories.

In Zangle the ADA code is called Program or Service code. The Program code for the majority of the students enrolled in San Diego Unified School District will be blank. The reason for this is that the majority of the students are enrolled in “regular” programs. The program code for Special ED students identifies the type of services a student receives. All Special Education information is edited and stored in Encore. The ENCORE system is used to put in a student’s IEP and updates the students program code in Zangle. PLEASE NOTE: Sites cannot edit SPED data in Zangle. All changes to SPED data must be made in Encore.

Grade Level Codes

As the students age increases to another level, i.e., from -1 to K, the grade level will automatically be changed in ZANGLE for each student. Grades K-12 grade level automatically changes when a student promotes to the next grade level, with the exception of new enrollees and students returning from a break in enrollment from SDUSD.

Grade Level Descriptions

Grade Code	Description	Usage
-5	Less than 1 year old	Babies of students
-4	1 Year Old	Babies of students, Seek, Pre-formal
-3	2 Years Old	Seek or Pre-formal
-2	3 Years Old	Pre-K or Child Development students
-1	4 Years Old	Pre-K or Child Development students
0-12	Kindergarten – 12 th	School age according birthdate

9. Schedule the student to a class room refer to Zangle User Guide, Scheduling Handbook, Scheduling during the School Year, Part III. **Secondary sites** should be advised that if a student’s schedule does not meet the state’s minimum day requirement **will not** earn the district ADA. The grade level range for each class on the Master Schedule screen must accurately reflect the grades represented in that class (i.e. combination Kindergarten and first grade would be a K/1 class.)
10. The following site staff should be notified of incoming students: attendance, library, cafeteria, classroom teacher, ESL teacher when appropriate, nurse, resource teacher.
11. Send request to prior school for student’s records.



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12. Post the new student on the Enter/Leave log using the first day of class attendance as the enter date, and keep a running total in the TOTAL ENROLL column.
13. File the K-12 Student Enrollment Form in a file for the cards of all active students.

The following is a quick checklist outlining the steps to enter or transfer a student:

Enter/Transfer Check List			
Enters:		Transfers:	
Enter in Computer	0	Remove from Computer	0
Notify Teacher/Nurse/Resource Teacher cafeteria, library.	0	Notify Teacher/Nurse/Resource Teacher cafeteria, library.	0
Record on Enter/Leave Log	0	Record on Log	0
Add to Class List	0	Notify Attendance	0
Request Records	0	Pull K-12 Enrollment Form, put in inactive	0
File K-12 enrollment Form	0	Pull CUM; Retire, or Send	0

Daily Enrollment Procedures: Drops/Withdrawals

Withdrawals - Parent Initiated

1. Parent or guardian must be present. Check with, or send a routing slip, to attendance, library, cafeteria, classroom teacher, ESL teacher when appropriate, nurse, and resource teacher. Students need to be dropped from ZANGLE. Refer to Zangle User Guide, Enrollment Part IV.

EXIT CODE - When students transfer from one school to another, a EXIT CODE is required along with a LEAVE DATE.

LEAVE DATE - is the last day the student attended the school UNLESS the student's final days at the school were SUSPENSIONS. Then the leave date is the last day of the suspension.

2. Post the drop on the Enter/Leave log using the last day of class attendance as the drop date. Subtract the drop from the TOTAL ENROLL column for the site's current enrollment count.
3. Remove the K-12 Student Enrollment Form from the file of active students, write the drop date and where the student is going; file form at the back of the "card file" under drops. You will probably get calls asking about the drops so a convenient place to file the drop cards is in back of the active student cards.
4. Notify Attendance of the drop. The student now has a status code of "I" (Inactive) and cannot be accessed by your site if active at another district school.
5. After notification to Attendance, pull students CUM, update CUM card; add copies of the Transfer, the ZANGLE Student screen, the student attendance from ZANGLE; obtain the



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health card from the nurse and the ESL Progress Card if appropriate; and delete the student's name from the food certification roster.

Withdrawing -- Students Who Stop Attending

Enrollment should be notified if a staff member (ie. Teacher, Attendance, Principal, **ENROLLMENT**, cafeteria, resource teacher, ESL teacher, counselor), notices a student has stopped attending class. Confirm with Attendance or Counselor that the family has moved or that student is enrolled at another school. Parent contact must be made before the student is dropped, unless the family cannot be found. If the family cannot be found, be sure to document your attempts to contact the family.

**Schools must not drop and re-enroll a student who leaves for a vacation or family business. If there is reason to believe that the family will be returning, the student must stay enrolled and be marked with appropriate absence code.

Changing vs. Correcting Student Records

There is a big difference between change and correct, and great care should be used to ensure that the proper steps are taken.

Changing a student's record is used when a student is:

- Transferred from one room to another.
- Reclassified as special education (or special education to regular).
- Moves from one grade to another during the school year (Promotion or Retention)

Changes are executed in the "Student Editor" module. The Change function has an effective date of change. This will be the first day that the student attended class in the new room, or the first day that he or she was considered to be in a new grade or special education category.

For students who change from one class to another, the attendance and enrollment record for the days prior to the effective date of change will stay in the old class. Starting on the effective date of change, the attendance and enrollment record will be part of the new class.

Correcting a student's record is used when:

- The student was enrolled in the computer in one class, but he was really in another class, and never attended in the class in which his record appears.
- The student was special education for the whole year, no program code on his record.
- The student's record reflected the wrong grade.

In all cases, there was an error in the student's enrollment record. This option is not used often. It is not used when students actually move from one room to another. In special cases it is recommended that the Helpdesk is contacted to assist in correcting the student's attendance record.



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Before Opening Day

Enrolling Students

Returning students are pre-enrolled automatically for the new year. New students should be enrolled as soon as possible and definitely by their first day of class. Refer to the Daily Enrollment Procedures section in this manual and the Zangle User Guide, Enrollment Handbook “Preparing for Next Year” for details.

Assigning Students to Classes

Once all students are enrolled, or as each student is enrolled, assign them to classes. Refer to the ZANGLE User Guide- Scheduling Handbook for details.

Opening Day

Opening Day Enrollment Count

Opening day is often a hectic time at schools. Personnel are just returning from summer break or may be new employees with no training or knowledge about entering or transferring students or using the ZANGLE computer system.

Several district staff departments and divisions eagerly await the opening day enrollment count, i.e., the Superintendent, Budget, Financial Accounting, Planning and Research, as well as various public media groups.

This information is provided by ZANGLE System to Pupil Accounting. It is extremely important to obtain accurate counts at each site as early as possible because the counts are made public and district staff begins to use these counts immediately.

Enrollment will need assistance in getting the site active enrollment records cleaned up in the Zangle system. Telephone calls must be made ASAP to the home of students expected on the first day who do not appear at the school to determine if these students are “NO SHOWS” (students who have not attended during the first two weeks of school). These students may be enrolled in another district school or may have moved from the area over the summer.

Enrollment must **not** drop a student as a “NO SHOW” until there has been confirmation that the student has moved from the neighborhood, or has enrolled at another school. It is important to take all steps possible to determine the whereabouts of the student pre-enrolled to attend your school prior to the decision to summer drop. The summer drop may allow a student to disappear from the educational system. All “NO SHOW”s must be dropped prior to the end of the first school accounting month (refer to the Calendars- on the Pupil Accounting webpage). The clerk must use the EXIT CODE of “05 - NO SHOW - Enrollment Dropped” when withdrawing a “NO SHOW” student. If the family can’t be found, be sure to document your attempts to contact the family.

New students will appear on the first day of school to enroll. **ENROLLMENT** will need assistance in getting these students enrolled in ZANGLE and assigned to a classroom in ZANGLE as quickly as possible. Until this critical step occurs, these students are NOT in the active enrollment count in ZANGLE nor can attendance be posted in ZANGLE for them.

A careful review of these K-12 Enrollment Forms is required to see that they are completed in full by parent/guardian and by the site staff. This responsibility would routinely lie with the site staff member



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working with a new enrollee or in the case of returning students, this responsibility would ultimately be that of the staff member responsible for the active enrollment and other staff as designated by the Principal.

For new students, **ENROLLMENT** must review documents of proof of address, make a photocopy of the document, and file the copy in the student's CUM file. When this is done, site staff member should initial the box "ADDRESS VERIFIED" on the K-12 Enrollment Form.

For returning students who have not moved, **ENROLLMENT** must confirm that the address listed on the K-12 Enrollment Form matches the address in the ZANGLE system. Also confirm that the CUM file has a copy of proof of address.

Summer Drops - "NO SHOW"s

After a student has been confirmed as a "05-NO SHOW" or summer drop, **ENROLLMENT** must drop the student from ZANGLE. If the EXIT DATE is the same date as the ENTRY DATE, then the EXIT CODE is "05". In ZANGLE the student is given the code "NO SHOW" Enrollment Dropped - 05" (refer to ZANGLE User Guide, Enrollment Handbook). Summer drops are not required to be listed on the Enter/Leave log, but many schools like to keep a separate list for their own use. This process applies for any "NO SHOW" during the year (e.g., if a student is registered to start on December 1 and does not start, the LEAVE DATE is also December 1).

Opening Day Transfers

List all students transferring after the first day of school on the Enter/Leave log. A student attending the first day only and then transferring will have a EXIT DATE that is the same date as the ENTRY DATE, but the EXIT CODE will not be "05 NO SHOW", because one day of ADA is earned.

Opening Day Enters

New students enrolling on opening day are not required to be listed on the Enter/Leave log, but many schools like to keep a separate list for their own use. Enroll the student in ZANGLE with a START DATE of the first day of school. If the student arrives too late in the day to start class and is told to start the next day, use the second day of school as the START DATE.

Enters After the First Day

List all students entering after the first day of school on the Enter/Leave log and enroll them in ZANGLE system. Follow the steps described in **Daily Enrollment Procedures** on page 2 of this document.

Tips for Handling Opening Day

As mentioned earlier, opening day can be somewhat hectic, particularly at larger schools. Most schools are likely to have many enters and transfers to handle with a staff just returning after a summer break. Even small schools can have heavy activity on the first day of school. It is very important that all staff pitch in to help during this busy time. Here are some ideas for handling opening day more efficiently:

- On the day preceding the start of school, print out class rosters for all teachers. Identify students without schedules by referring to the Zangle User Guide, Scheduling Handbook



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- On opening day, give priority to entering and dropping students. Concentrate on processing enters because, if the student is coming from another district school, he or she will automatically be dropped at the other site.
- Process district students first because it takes less time to process district students than out-of-district students.
- Using at least three persons, set up a system for handling enrollment transactions based on the complexity of the work and the experience of the staff member. Here is a sample of how it might work:

Clerk 1	Clerk 2	Clerk 3
Most experienced	Next most experienced	Least experienced
Out-of-district enters	New enters from other district schools	Known drops

This plan assigns the most experienced person to the most time-consuming and complicated task. Here are some other ideas for simplifying the day's activities:

- Use parent volunteers or assign a staff person to hand out registration packets, help parents complete forms, translate, assist at the counter, answer telephones, take children to the classroom, or perform other similar duties.
- Have a sign placed in front of the school or prepare a handout telling parents what they need to register students at your school (for example: immunization records, birth certificate, proof of residence, etc.). This will avoid having parents stand in long lines only to be told they do not have the required paperwork.
- Have someone available to handle lengthy transactions (e.g., complaints, questions).
- Most importantly, the principal should allocate sufficient resources to ensure opening day is handled efficiently. In some cases, this may mean bringing the guidance aide and other clerical staff on duty earlier to prepare for and assist with enrollment processing.

Assigning Students to Classes

Each student who is attending school must be assigned to a classroom. For further instructions on how to complete these tasks, see the ZANGLE User Guide, Scheduling Part II, Scheduling Students.

Determining if all students are scheduled

Refer to the Zangle User Guide, Scheduling for the new school year. Sometimes a student will be enrolled in the school and the computer and begin attending, but not be assigned to a class in the computer. Every student who is actively enrolled must be assigned to the class he or she attends. In ZANGLE, these unassigned students need to be assigned to a classroom.



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Reports and Reconciliation

Refer to the Pupil Accounting Calendar for Active Enrollment dates for Enrollment reporting. Active Enrollment is always on the last day of the school reporting month. **ENROLLMENT** verifies that the ending enrollment totals are what was enrolled on the active enrollment date, allowing for postdated activity.

ENROLLMENT verifies the accuracy of the number of enters and drops.

ATTENDANCE verifies the reasonableness of the data in the attendance columns.

IT will print a Gain/Loss report (SAS35) on the night of the Active Enrollment date and have it delivered to the schools on the following Monday. **ENROLLMENT** is responsible for making sure that the report arrives and should contact IT if it does not arrive when expected.

On Active Enrollment Date

Compare Zangle Gain/Loss Report (refer to Zangle User Guide, Enrollment Handbook), versus Gain/Loss Report (SAS35) and the Enter/Leave Log.

This must be done on the Active Enrollment date or the ADA calculations will be inaccurate. A master of the Enter/Leave log is included at the end of this section. Compare the ending total on the Gain/Loss report to the Enter/Leave log total on Active Enrollment date.

Note: For those schools with State Pre-Kindergarten, add the total number of Pre-K students to the Gain/Loss report total in order to balance to the Active Enrollment total.

Students who have a drop date of the last day of the school month will be subtracted from the ending total on the Gain/Loss report, but they were still enrolled on the active enrollment date. Keep this in mind and use it as an adjustment if needed.

Check that all students listed on the Enter/Leave log are also listed on the Gain/Loss report with the same enter or drop date on both documents.

Make corrections to the Enter/Leave log or ZANGLE system whichever is wrong.

If the Gain/Loss report and the Enter/Leave log still do not balance, check the month end totals for all prior months and check the starting enrollment.

After all corrections have been made and the SAS35 is balanced, **ENROLLMENT** and Principal sign the Certification Statement, found on the last page of the SAS35. Make a photocopy of the signed certification and file it with the rest of the SAS35 and the other enrollment records for the month. Mail the original last page of the SAS35 Gain Loss Report, Zangle Gain/Loss Report and the Monthly Accumulative Attendance Report to Pupil Accounting, Room 3202.



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Annual Procedures -- Records Retention

State Education code requires that all records that relate to the entering and dropping of students must be kept for the current year plus three (3) past years. These records include:

SAS 35 Gain Loss Report
Enter/Leave logs
Zangle Gain Loss report with Details

ADDITIONAL INFORMATION CAN BE FOUND

Zangle User Guides, Scheduling & Enrollment Handbook, <http://www.sandi.net/zangle>
Zangle Training Classes

Procedures	http://www.sandi.net/policy
Calendars (Traditional and Year Round)	http://prod031.sandi.net/pupil_acct
Forms and References (Enter/Leave Log)	http://prod031.sandi.net/pupil_acct

IT Help Desk can also assist you if you have any questions concerning running Zangle or manipulating data to generate your own reports.

There are Zangle classes you can attend. Check the webpage at <http://www.sandi.net/zangle> for dates and details on how to sign up for a class.

Pupil Accounting	(619) 725-7575
IT Helpdesk	(619) 725-7500
Enrollment Options	(619) 725-5672



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This is an example of how to label an envelope in which to file all required enrollment documents for a month. (Or you may want to keep all this information in a binder for the year.)

ENROLLMENT

MONTH 1, 2005 - 2006

9/6 - 9/30 (19 DAYS)

Include: Enrollment Analysis Report (ZANGLE)
 Enter/Leave Logs
 Zangle Gain/Loss Report

