



NORTH CAROLINA STUDENT INFORMATION SYSTEM

**Generating Student Activity Report
(SAR)
User Guide**

Last Updated: 11/07/2014



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Introduction

The Student Activity Report (SAR) reports on who is teaching a class, duration, timing and location of the class, and the number of students in the class.

SAR Reports can be run after End of Year (EOY) has completed, the school is setup and the new school year has started. Running the SAR and other State Compliance Reports early will assist you in having more time to work on exceptions and makes you aware of updates needed in the data.

Important: The SAR collection period occurs annually from early September to mid-November.

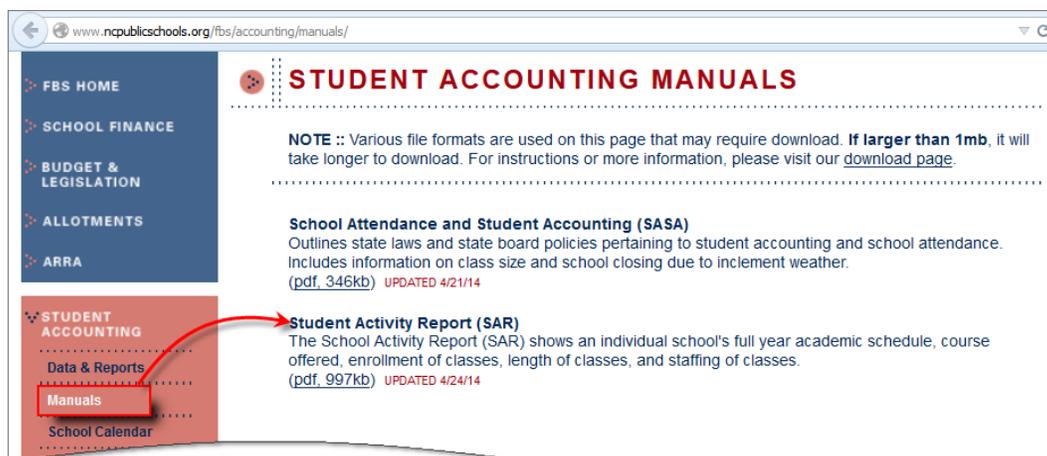
Notices are sent from DPI to coordinators of all public and charter school systems regarding reporting needs during the school year. All PowerSchool Coordinators must be signed up to receive the notices. Coordinators can request to be added to the email list by emailing [Home Base Support Center \(http://www.nc-sis.org/support.html\)](http://www.nc-sis.org/support.html).

Contacts

For SAR policy questions, email Sandra Johnson at sandra.johnson@dpi.nc.gov. SAR functionality related questions in PowerSchool should be directed to the [Home Base Support Center](http://www.nc-sis.org/support.html).

Assumptions

This document assumes that all schools are familiar with the **Student Activity Report (SAR)** policy located under <http://www.ncpublicschools.org/fbs/accounting/manuals> and have completed the sequential processes and configurations detailed in the **NC Form B Instructions** (located under <http://www.nc-sis.org>) that occur *prior* to completing the steps detailed in this user guide document.





How to use this User Guide

The content detailed in this User Guide is specific to generating the Student Activity Report (SAR) reports in PowerSchool.

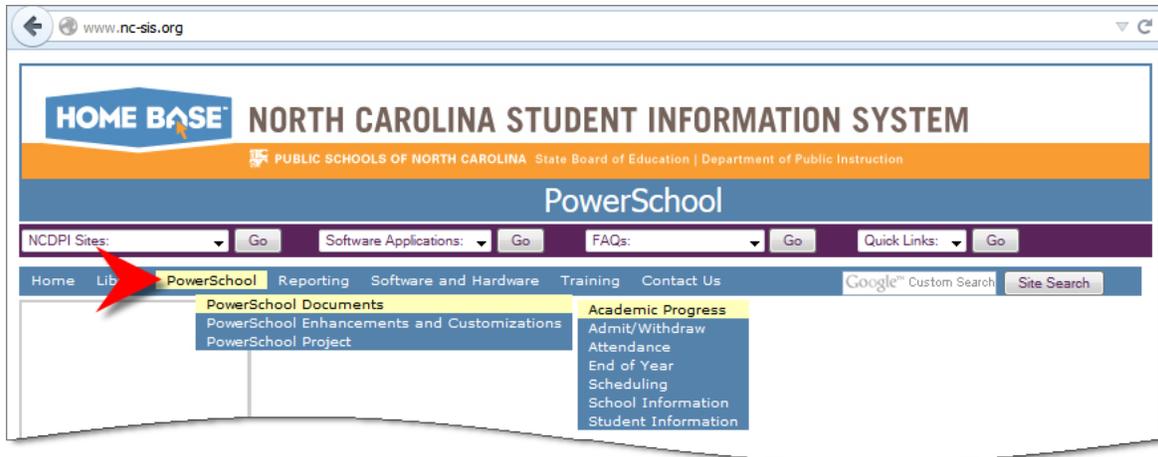
The recommended method to utilize this user guide is in the sequential order listed below:

1. [Configuring SAR Setup](#)
2. [Running SAR Data Collection](#)
3. Utilize the [School Activity Report \(SAR\) Checklist](#) to ensure that all configurations are complete.
4. [Reviewing SAR reports.](#)
5. [Reviewing SAR Exceptions List](#)

Configuring SAR Setup

Prior to running the SAR Reports, ensure that the following configurations in PowerSchool are complete.

Note: Where applicable, associated supporting setup documentation is reference, for e.g.: **Years and Terms Setup (QRD)**. Unless stated otherwise, these documents are located under <http://www.nc-sis.org>.



1. Years and Terms: Refer to **Years and Terms Setup (QRD)**. If the Student is cross-enrolled, refer to **Cross Enroll Students - Same LEA (QRD)**.
2. Periods: Refer to **Periods (QRD)**.
3. Days: Refer to **Periods (QRD)**.

4. Bell Schedule: On the **Bell Schedules** screen, click the bell schedule that best represents a traditional amount of instructional time for a school day. Select 'Yes' from the **Use for SAR Calculation of Minutes** drop-down menu on the **Edit Bell Schedule** screen.

Important: For other Bell Schedules such as Early Release, Late Arrive, Exam Day, etc., set the **Use for SAR Calculation of Minutes** drop-down menu to 'No'. If the bell schedule is left blank, it will be considered as a 'No' according to Pearson developers. This setting prevents the SAR Personnel Summary report from over inflating the number of minutes taught in a day.

Note: If schools use more than one bell schedule in a normal rotation, multiple bell schedules may be set to 'Yes'.

Note: This selection affects SAR and Principal's Monthly Report (PMR).

The screenshot shows the 'School Setup' page in the HOME BASE system. A red box highlights 'School' in the left-hand navigation menu. A red arrow points from 'School' to the 'Bell Schedules' link in the main content area. Another red arrow points from 'Bell Schedules' to the 'Edit Bell Schedule' dialog box. In this dialog, a red box highlights the 'Use for SAR Calculation of Minutes' option, which is set to 'Yes'.

Attendance	Description
Attendance Codes	Define attendance codes and their attributes.
Attendance Code Categories	Define attendance code categories such as tardy, excluded.
Attendance Conversions	Define attendance calculation conversion settings used when calculating ADA.
Attendance Tracking and Notification	Define parameters for attendance tracking and notification purposes.
Full-Time Equivalencies (FTE)	Define student full-time equivalencies used when calculating ADA.
Preferences	Specify general attendance preferences.
Section Attendance Settings	Set attendance recording options for Sections that meet more than once on the same day.
Quick Look Up Preferences	Set display preferences for the Quick Look Up Report Page.

Calendaring	Description
Automated Calendar Setup	Set up calendar days according to a pattern.
Bell Schedules	Define bell schedules for the current school

Name	Edit Schedule	Periods	Attendance Conversion Method
1 hour delay	Edit Schedule	4	1 hour delay
2 Hour Delay	Edit Schedule	4	2 hour delay
3 Hour Delay	Edit Schedule	4	3 hour delay
Early Release Schedule	Edit Schedule	4	Early Release Day
Regular School Day	Edit Schedule	5	Regular School Day

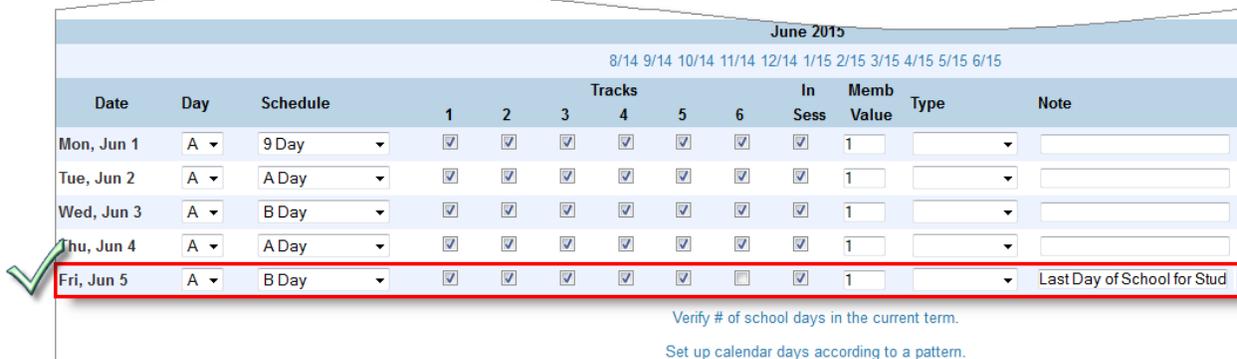
Option	Value
Name	Regular School Day
Attendance Conversion Method	Regular School Day
Use for SAR Calculation of Minutes	Yes

Refer to [Bell Schedules - Daily Attendance \(QRD\)](#) and/or [Bell Schedules - Meeting Attendance \(QRD\)](#) for details on setting up bell schedules.

Configuring SAR Setup

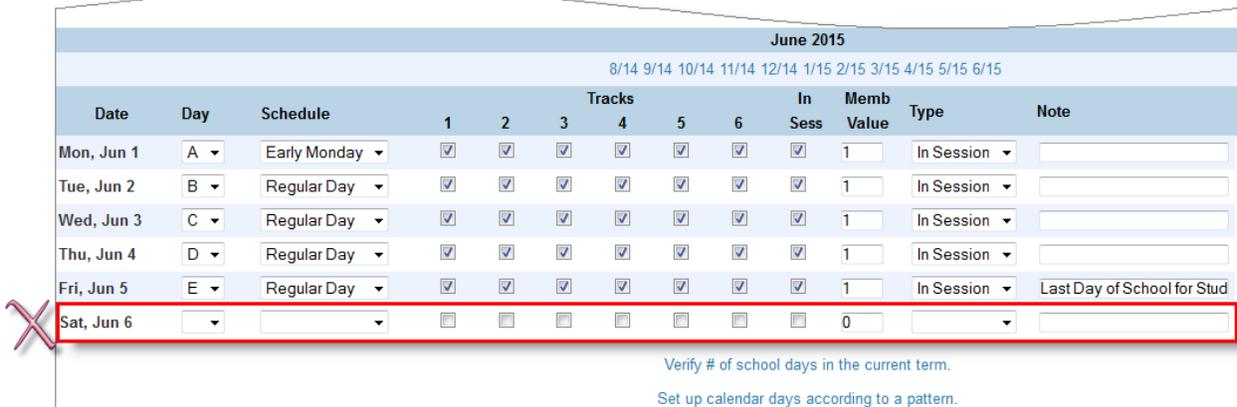
5. Calendar Setup – Ensure that the **Day** column accurately reflects the expected scheduling activities on that date.

Note: The Years/Terms Beginning and Ending dates must match the first date available on the **Calendar Setup** screen, which must be marked as an in-session day. If the Years/Terms dates include padded days either prior to the start of school or after the students last day of school, the calendar will reflect those dates. These padded dates **MUST** be removed. Padding of the calendar and term dates may result in no data being reported on the SAR for teacher and/or students.



June 2015												
8/14 9/14 10/14 11/14 12/14 1/15 2/15 3/15 4/15 5/15 6/15												
Date	Day	Schedule	Tracks						In Sess	Memb Value	Type	Note
			1	2	3	4	5	6				
Mon, Jun 1	A	9 Day	<input checked="" type="checkbox"/>	1								
Tue, Jun 2	A	A Day	<input checked="" type="checkbox"/>	1								
Wed, Jun 3	A	B Day	<input checked="" type="checkbox"/>	1								
Thu, Jun 4	A	A Day	<input checked="" type="checkbox"/>	1								
Fri, Jun 5	A	B Day	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	Last Day of School for Stud					

Verify # of school days in the current term.
Set up calendar days according to a pattern.



June 2015												
8/14 9/14 10/14 11/14 12/14 1/15 2/15 3/15 4/15 5/15 6/15												
Date	Day	Schedule	Tracks						In Sess	Memb Value	Type	Note
			1	2	3	4	5	6				
Mon, Jun 1	A	Early Monday	<input checked="" type="checkbox"/>	1	In Session							
Tue, Jun 2	B	Regular Day	<input checked="" type="checkbox"/>	1	In Session							
Wed, Jun 3	C	Regular Day	<input checked="" type="checkbox"/>	1	In Session							
Thu, Jun 4	D	Regular Day	<input checked="" type="checkbox"/>	1	In Session							
Fri, Jun 5	E	Regular Day	<input checked="" type="checkbox"/>	1	In Session							
Sat, Jun 6			<input type="checkbox"/>	0								

Verify # of school days in the current term.
Set up calendar days according to a pattern.

6. Courses:

- a. Ensure all the applicable courses are available for your school. Refer to **Managing Courses - School Level (QRD)**. If a new course is:
 - Needed: check the course list for 2014/15 at <http://www.ncsis.org/courses.html>.
 - Not found: contact the [Home Base Service Center](#) for assistance. Be sure to request new codes in a timely manner to prevent delaying your SAR collection.

Important: Keep in mind that if you use the 9935 non-reporting course code, it will not reflect in the SAR reporting and will be dropped from any data used in SAR.

- b. Schedule course sections with valid state approved course codes for the current school year. Ensure the course has the appropriate:
 - Subject content
 - Academic level
 - Grade level (Starting 2014/15, the grade level in the course code represents the grade span of the student. The 6th character indicates the grade level of the student, not the subject grade level as in the past – example = middle school course for high school credit will have 'Y' for a student in the middle school.

- c. Add the course section attributes that identify accurate information for the class or populate a default option:
 - Instruction Code
 - External Provider
 - Third Party Provider
 - Delivery Mode
 - Course Length
 - How Taken

7. Sections: Refer to [Adding Sections \(QRD\)](#).

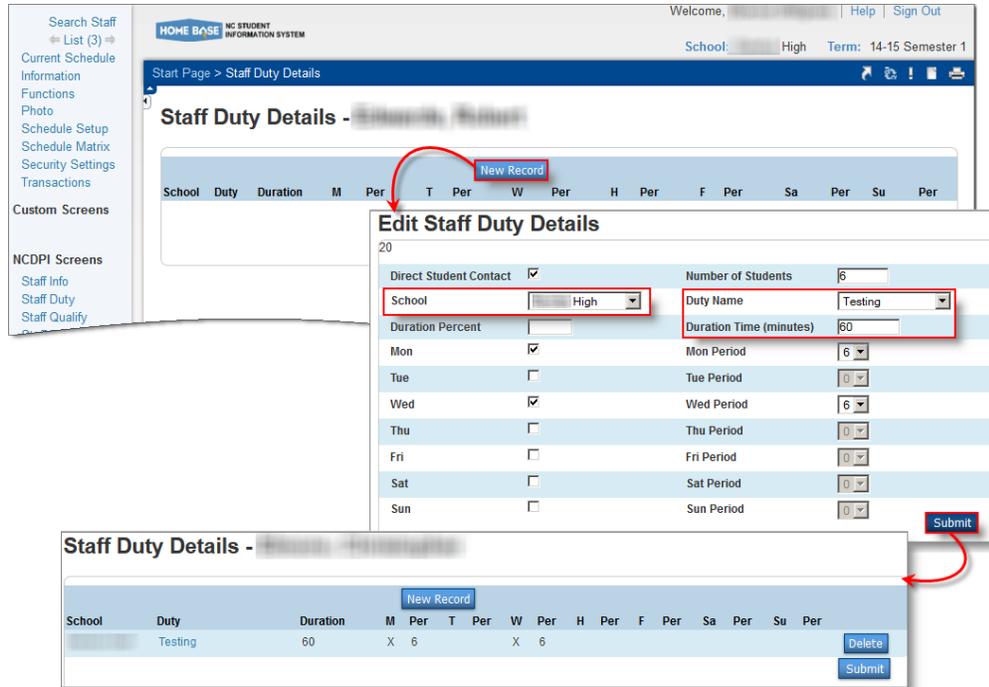
8. Staff: Refer to [Adding/Inactivating Staff Members \(QRD\)](#).

Note: For staff members who are no longer affiliated with the school and have not been active in the school since the previous year, uncheck the **Active** checkbox and select 'Not assigned' in **Staff Type** drop-down menu. For staff members who have been active in the school in the current year (i.e.: had classes assigned) only uncheck the **Active** checkbox.

ID	
StatePrid	
Homeroom	
Home School	High
Lunch ID	
Home Phone #	2400
School Phone #	3171
Street	
City, State, Zip	
SSN	
DOB	1974 (MM/DD/YYYY)
Staff Type	Teacher
Active	<input checked="" type="checkbox"/>
Migrant ID	0
<input type="button" value="Submit"/>	

Configuring SAR Setup

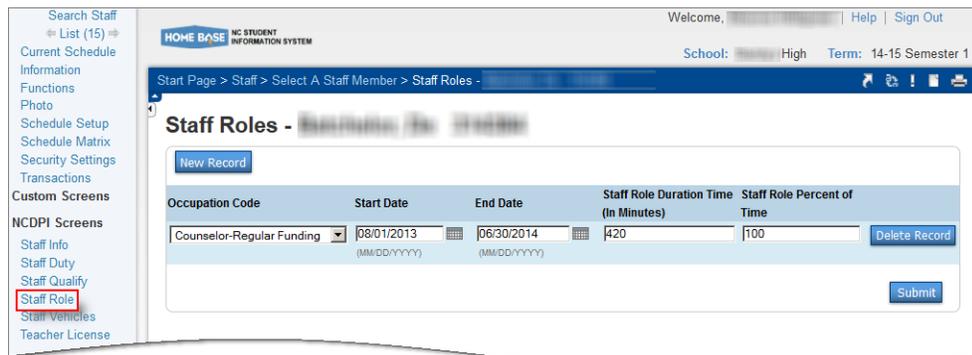
- a. SAR Duties: Once a Staff is selected, select the appropriate duties and duration (based on an instructional day) assigned to the Staff at the particular school. If a staff member is in contact with students, check the **Direct Student Contacts** checkbox.



Note: Use the 'Non Scheduled Instruction Support' **Duty Name** for a staff who works with students on a regular basis, but is not assigned to class.

Important: Although it is not mandatory to define the week periods currently in PowerSchool 7.11, we recommend adding this information in the event that it becomes mandatory in the future.

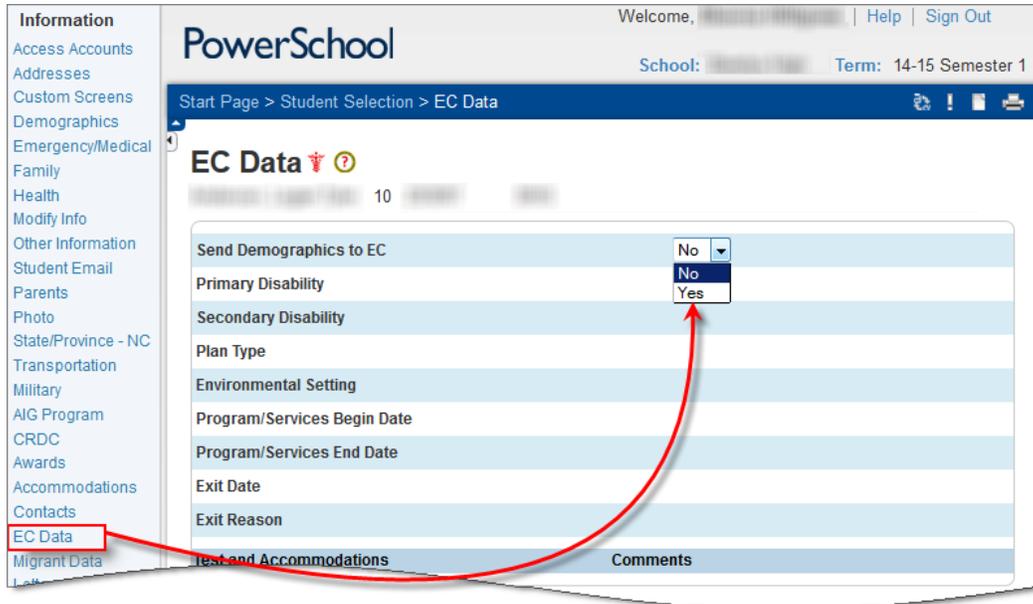
- b. SAR Roles: If the Staff roles have rolled over from the previous year, no further action is needed for that year's record. To create a role for the current year, select a Staff, click **New Record** and select the appropriate role, start and end dates need to reflect the timeframe of their role in this school. Start and End dates must match the current school year's start and end dates.



Configuring SAR Setup

9. Students: All Students (K-13) must have a schedule; homeroom should not be the only class in a student's schedule. When applicable, students who have an IEP (Individual Education Plan) must have EC (exceptional children) data in PowerSchool for accurate SAR reporting. A student's record must show their entire schedule while they were enrolled at the school.

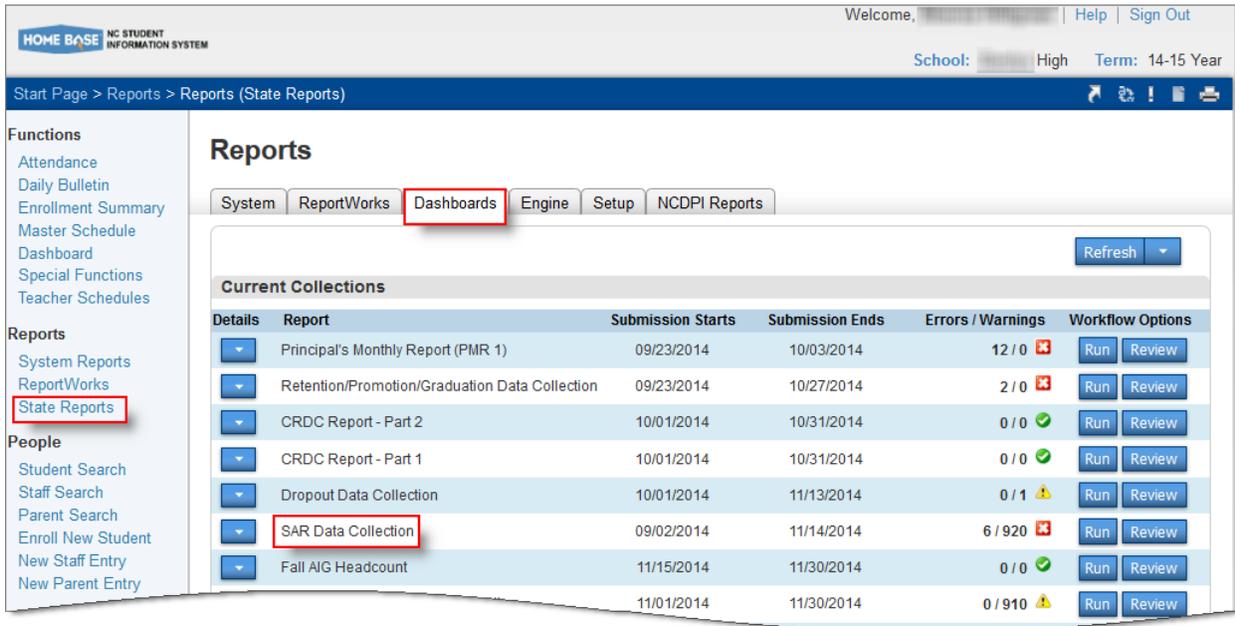
10. Exceptional Children (EC Students): Once EC Students are identified in PowerSchool, EC data will be populated from CECAS or 3rd party vendor data.



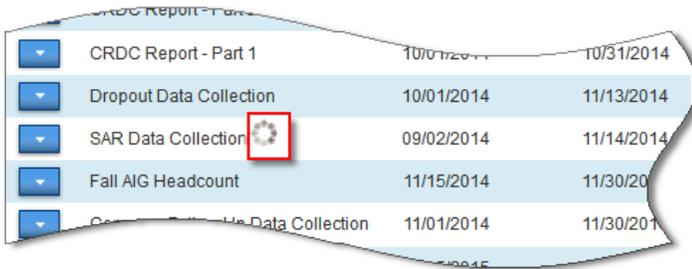
Note: Utilize the [School Activity Report \(SAR\) Checklist](#) on page 21 to ensure that all configurations are complete.

Running SAR Data Collection

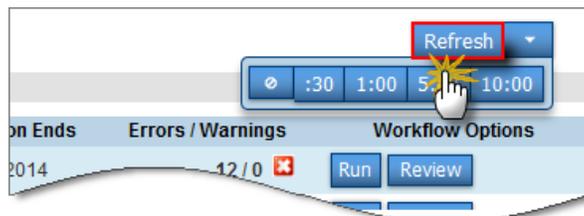
Navigation: Start Page > State Reports > Dashboards > SAR Data Collection



1. Click **Run**. The rotating circles indicate the report is generating.

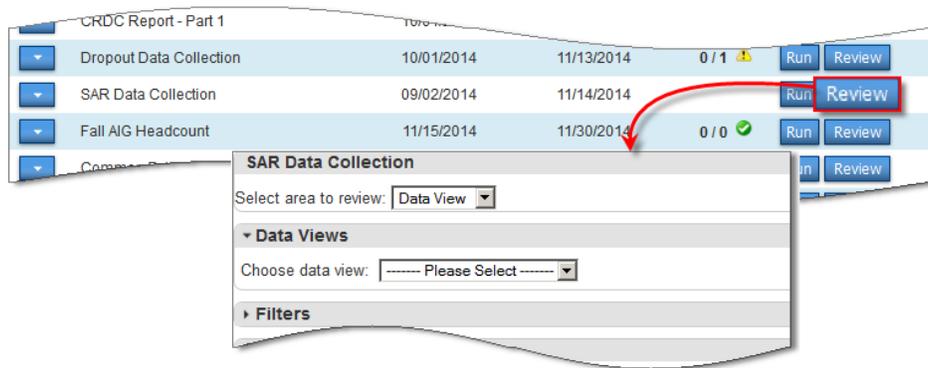


d. Click **Refresh** or select one of the refresh frequencies listed to refresh the queue till report completion.



Running SAR Data Collection

- Click **Review** to access the SAR report. The **SAR Data Collection** screen is displayed.



Proceed to [reviewing SAR Reports](#) on page 13.

Reviewing SAR reports

It is suggested that PowerSchool Administrators and Human Resources (HR) staff work jointly to review and complete the SAR data review process, and use the course crosswalk (<http://licensurepublic.dpi.state.nc.us/>) to determine if correct subject codes have been used for scheduling classes.

CAUTION: Do not approve SAR until close to the collection cutoff end date or DPI sends approval notification.

SAR Summary

A high-level summary of the courses taught at this school, including staff name, roles, and student ethnicities and counts.

On the **SAR Data Collections** screen, select the following settings to view the SAR Summary report:

1. Select 'Data View' from the **select area to review** drop-down menu.
2. Select 'SAR Summary' from the **choose data view** drop-down menu.

Optionally, you may apply filters under the **Filters** section to filter the records returned. Click the **Refresh** button to apply the filters.

Note: If updated data is not displayed, click the **Clear Cache** link to clear cookies in your web browser. Click **Refresh** for updated information. If data is not refreshed, contact [Home Base Support Center](#).

The screenshot shows the 'SAR Data Collection' interface. Under 'Data Views', 'SAR Summary' is selected. The 'Filters' section includes:

- Subject Area Code: [Dropdown]
- Academic Level: [Checked] Honors/Advanced/Academically Gifted
- Course Attributes: [Checked] Third Party Provider: None
- Section Attributes: [Dropdown]
- Course Number: [Dropdown]
- Course Name: [Dropdown]

 A 'Refresh' button is present. Below the filters is a 'results' section titled 'SAR Summary (2 total records filtered*)'. It features a table with the following data:

Subject Area Code	Academic Level	Course Attributes	Section Attributes	Course Number	Course Name	Section Number	Term	Period/Day	Staff Name	Staff Role	Grade Range	Total Students	Max Enrollment	#Over	American Indian/Alaskan Native (M)	Ame Indian/ Nat
1	2301	Honors/Advanced/Academically Gifted	Third Party Provider: None	23015X0M3	MATH III HONORS	2	S2	2(A)		TE	10-11	30	34		0	
2	2301	Honors/Advanced/Academically Gifted	Third Party Provider: None	23015X0M3	MATH III HONORS	3	S2	1(A)		TE	10-11	23	34		0	

At the bottom of the results area, there are navigation buttons: '<<', '<', 'Page(s) 1 of 1', '>', '>>', 'Export', and 'Clear Cache'.

Note: Click **Results per Page** in the **Results** area to adjust the desired number of lines to display. From this page, you may choose to export the data displayed by clicking the **Export** button.

SAR Detail

A listing of students by course and section with grade level and documented exceptionalities.

On the **SAR Data Collections** screen, select the following settings to view the SAR Detail report:

1. Select 'Data View' from the **Select area to review** drop-down menu.
 2. Select 'SAR Detail' from the **Choose data view** drop-down menu.
- Optionally, you may apply filters under the **Filters** section to filter the records returned.

Note: If updated data is not displayed, click the **Clear Cache** link to clear cookies in your web browser. Click **Refresh** for updated information. If data is not refreshed, contact [Home Base Support Center](#).

The screenshot shows the 'SAR Data Collection' interface. At the top, there is a 'Select area to review' dropdown set to 'Data View'. Below that is a 'Data Views' section with a 'Choose data view' dropdown set to 'SAR Detail'. A descriptive text reads: 'A listing of students by course and section with grade level and documented exceptionalities.' The 'Filters' section contains several filter boxes with checkboxes: Staff Name, Course Name, Course Number (checked and set to 54185X04VA), Section #, Term, Period/Day, Student UID, Student Name, Student Grade Level, Primary Exceptionality, and AIG. A 'Refresh' button is located to the right of the filters. The 'Results' section shows 'SAR Detail (6 total records filtered*)' and a 'Results per page' dropdown set to 25. Below this is a table with 11 columns: Staff Name, Course Name, Course Number, Section #, Term, Period/Day, Student UID, Student Name, Student Grade Level, Primary Exceptionality, and AIG. Two rows of data are visible, both for Course Number 54185X04VA, Section # 2, Term S1, Period/Day 3(A), and Student Grade Level 12.

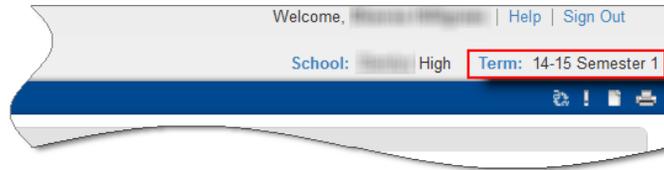
	Staff Name	Course Name	Course Number	Section #	Term	Period/Day	Student UID	Student Name	Student Grade Level	Primary Exceptionality	AIG
1		Visual Arts - Advanced	54185X04VA	2	S1	3(A)			12		
2		Visual Arts -	54185X04VA	2	S1	3(A)			12		

Note: The **Results** section will indicate **# total records filtered*** message when filters are selected. For e.g.: In the image above, only 6 records of the full data set are displayed because the **Course Number** filter is in use.

Note: Click **Results per Page** in the **Results** area to adjust the desired number of lines to display. From this page, you may choose to export the data displayed by clicking the **Export** button.

SAR Personnel Summary

A summary list of the classes taught by each staff member in the classroom as well as staff assigned non-classroom roles, for the specified term.



On the **SAR Data Collections** screen, select the following settings to view the SAR Personnel Summary report:

1. Select 'Data View' from the **Select area to review** drop-down menu.
 2. Select 'SAR Personnel Summary' from the **Choose data view** drop-down menu.
- Optionally, you may apply filters under the **Filters** section to filter the records returned.

Note: If updated data is not displayed, click the **Clear Cache** link to clear cookies in your web browser. Click **Refresh** for updated information. If data is not refreshed, contact [Home Base Support Center](#).

Results

SAR Personnel Summary (2 total records *filtered*) Results per page 25

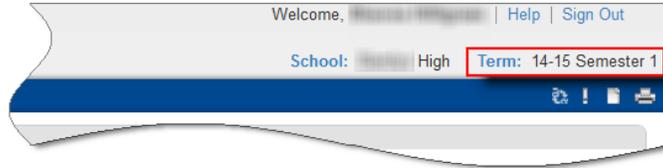
Staff Name	Staff UID	Gender	Ethnicity/Race	SSN	Course Number	Course Name	Academic Level	Grade Level	Section #	Term	Period/Day	Staff Role	Classroom/Non Classroom Minutes	Classroom/Non Classroom %Time
1		F	White	1905	HU402X01	Health Science I	Standard Version	High School	1	S2	2(A)	TE	93	100
2		F	White	1905	HU402X01	Health Science I	Standard Version	High School	2	S2	3(A)	TE	94	100

Page(s) 1 of 1 [Export](#) [Clear Cache](#)

Note: Click **Results per Page** in the **Results** area to adjust the desired number of lines to display. From this page, you may choose to export the data displayed by clicking the **Export** button.

SAR Class Coverage

A listing of classes where the total number of enrolled students exceeds the maximum number allowed, for the specified term. Class coverage is based on the number of students over the maximum set at the course section level.



On the **SAR Data Collections** screen, select the following settings to view the SAR Detail report:

1. Select 'Data View' from the **select area to review** drop-down menu.
 2. Select 'SAR Class Coverage' from the **choose data view** drop-down menu.
- Optionally, you may apply filters under the **Filters** section to filter the records returned.

Note: If you have no class overages, report will not be displayed. However, if you are aware of overages but the report does not display the data, click the **Clear Cache** link to clear cookies in your web browser. Click **Refresh** for updated information. If data is not refreshed, contact [Home Base Support Center](#).

SAR Data Collection

Select area to review: Data View

Data Views

Choose data view: SAR Class Coverage

A listing of classes where the total number of enrolled students exceeds the maximum number allowed.

Filters

<input type="checkbox"/> Course Number	<input type="checkbox"/> Course Name	Refresh
<input type="checkbox"/> Subject Area	<input type="checkbox"/> Academic Level	
<input type="checkbox"/> Grade Level	<input checked="" type="checkbox"/> Section # 5	

RESULTS

SAR Class Coverage (3 total records **filtered***) Results per page 25

Course Number	Course Name	Subject Area	Academic Level	Grade Level	Section #	Term	Period/Day	Staff Name	Staff UID	Staff Role	Grade Range	Total Students	Max Enroll	#Over
1	10312X0Q Journalism-Yearbook	1031	Standard Version	High School	5	S2	2(A)	XXXXXXXXXX	XXXXXXXXXX	TE	12-12	2	0	2
2	63022X01 Health/Physical Education	6302	Standard Version	High School	5	S2	1(A)	XXXXXXXXXX	XXXXXXXXXX	TE	09-09	36	35	1
3	FN412X01 Foods I	FN41	Standard Version	High School	5	S1	2(A)	XXXXXXXXXX	XXXXXXXXXX	TE	09-12	24	23	1

<< < Page(s) 1 of 1 > >>
[Export](#) [Clear Cache](#)

Note: Click **Results per Page** in the **Results** area to adjust the desired number of lines to display. From this page, you may choose to export the data displayed by clicking the **Export** button.

Exceptions

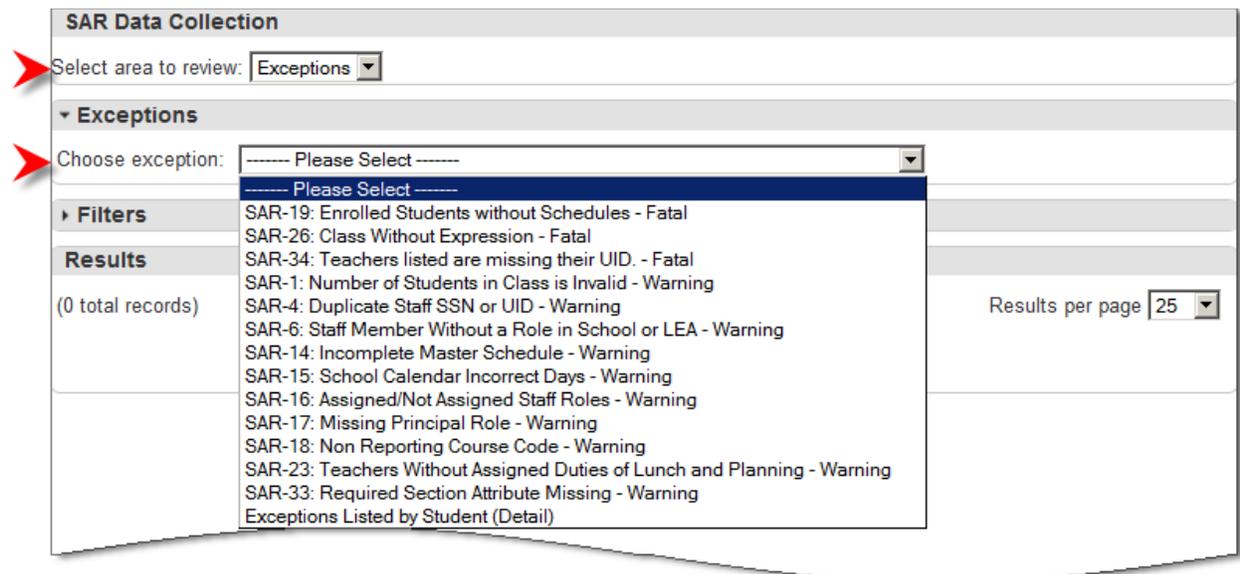
Each time you generated SAR reports, the exception reports listed in the **Exceptions** drop-down menu is directly reflective of the errors and warnings identified in your data. After you review each exception report and take the necessary action, re-generate the SAR. The exception reports will change based on your updates in PowerSchool.

While it is good business practice to review and update Information and Warning exceptions, all Fatal exceptions must be reviewed, updated, and re-run to resolve the exceptions.

On the **SAR Data Collection** screen, select the following settings to view the various Exception reports listed:

1. Select 'Exceptions' from the **Select area to review** drop-down menu.
2. Select the first exception report from the **Choose data view** drop-down menu.
3. Under **Filters** section, select the appropriate filter criteria and click **Refresh** to update the data in the **Results** section.

Note: The filter selections vary based on the exception reports selected in the **Choose data view** drop-down menu.



Note: Click **Results per Page** in the **Results** area to adjust the desired number of lines to display.

From this page, you may choose to export the data displayed by clicking the **Export** button.

Sample exception reports

Sample fatal and warning exception reports are listed below. For a complete list of Exceptions, refer to [SAR Exceptions List](#) on page 22.

FATAL

SAR Data Collection

Select area to review:

Exceptions

Choose exception:

Business Rule: A student is enrolled but he/she does not have any scheduled sections. All enrolled students must be scheduled into classes.

Steps to Correct: Schedule students into classes.

Filters

Results

SAR-19: Enrolled Students without Schedules - Fatal (4 available of 4 total records) Results per page

	Student Name	Student UID	Student Grade Level	Entry Date
1	[REDACTED]	[REDACTED]	10	08/25/2014
2	[REDACTED]	[REDACTED]	09	08/25/2014
3	[REDACTED]	[REDACTED]	10	08/25/2014
4	[REDACTED]	[REDACTED]	09	08/25/2014

WARNING

SAR Data Collection

Select area to review:

Exceptions

Choose exception:

Business Rule: Missing class sections in the Master Schedule. Master schedule must include all classes that will be offered throughout the year, including Year Long, S1, S2, T1, T2, T3, Q1, Q2, Q3, Q4 if those terms are defined in Years/Terms in PS.

Steps to Correct: Verify master schedule is complete for all terms and students are scheduled.

Filters

Results

SAR-14: Incomplete Master Schedule - Warning (7 available of 7 total records) Results per page

	Years Terms	School Name	School Number	Is Term Missing
1	2014-2015 (14-15)	[REDACTED] Middle	[REDACTED]	No
2	Semester 1 (S1)	[REDACTED] Middle	[REDACTED]	Yes
3	Semester 2 (S2)	[REDACTED] Middle	[REDACTED]	Yes
4	[REDACTED]	[REDACTED] Middle	[REDACTED]	Yes

Approving SAR reports

CAUTION: Do not approve the SAR until close to the collection cutoff end date or when DPI sends approval notification.

Schools will only see the approval button *after* all fatal exceptions are cleared (presuming warning exceptions have also been reviewed). Click the **Approve** button if the current date is close to the collection cutoff end date or DPI has sent approval notification.

Principal's Monthly Report (PMR 2)	10/22/2014						
Dropout Data Collection	10/01/2014	11/13/2014	28 / 6 / 0	!	Run	Review	Approve
SAR Data Collection	09/02/2014	11/14/2014	28 / 28 / 0	✘	Run	Review	Approve
Fall AIG Headcount	11/15/2014	11/30/2014	28 / 0 / 0	!	Run	Review	Approve
		11/30/2014	7 / 7 / 0	!	Run	Review	Approve

LEAs can only approve at the LEA level once all schools have approved at the school level. An error message, as shown below, is displayed if a LEA attempts to approve prior to all schools approving the SAR Data Collection.

Reports

System | ReportWorks | Dashboards | Engine | Setup | NCDPI Reports

Refresh

⚠ Cannot approve if any school has fatal errors.

Current LEA-Level Collections

Details	Report	Submission Starts	Submission Ends	Errors / Warnings	Workflow Options
	CRDC Report - Part 1	10/01/2014	11/30/2014		Run
	CRDC Report - Part 2	10/01/2014	11/30/2014		Run

Current School-Level Collections

Details	Report	Submission Starts	Submission Ends	Schools/Collected/Approved	Errors / Warnings	Workflow Options
	Retention/Promotion/Graduation Data Collection	09/23/2014	11/04/2014	28 / 28 / 0	✘	Run Review Approve
	Principal's Monthly Report (PMR 2)	10/22/2014	11/04/2014	28 / 28 / 0	✘	Run Review Approve
	Dropout Data Collection	10/01/2014	11/13/2014	28 / 6 / 0	!	Run Review Approve
	SAR Data Collection	09/02/2014	11/14/2014	28 / 28 / 0	✘	Run Review Approve
			11/30/2014	28 / 0 / 0	!	Run Review



Approving SAR reports

LEAs can review schools' progress by selecting **School Approvals** from the **Data views** drop-down menu.

SAR Data Collection

Select area to review: **Data View** ▾

▼ **Data Views**

Choose data view: **School Approvals** ▾

Details for all schools that are required to collect this report

► **Filters**

Results

School Approvals (28 total records) Results per page 25 ▾

	School Name	School Number	Collected On	Exceptions Fatal	Exceptions Warning	Approved On	Approved By	Principal Name	Principal Email	Principal Phone
1	[blurred]	[blurred]	09/26/2014 08:16:09	2	430			[blurred]	[blurred]	[blurred]
2	[blurred]	[blurred]	10/16/2014 12:02:49	6	973			[blurred]	[blurred]	[blurred]
3	[blurred]	[blurred]	09/26/2014	1	366			[blurred]	[blurred]	[blurred]

Note: Utilize the [School Activity Report \(SAR\) Checklist](#) on page 21 to ensure that all configurations are complete prior to approving the SAR Data Collection.

Appendix

SAR Checklist

Use this checklist below to ensure that all configurations are complete *prior* to approving the SAR Data Collection.

Complete the following		
1.	Setup bell schedules to accurately report the time for all scheduled periods (must be a minimum of 5 minutes).	<input type="checkbox"/>
2.	Verify the Term/Semester dates are not padded with non-session days before the start of school or after the end of the school year.	<input type="checkbox"/>
	If the Student is cross-enrolled, refer to Cross Enroll Students - Same LEA (QRD) .	<input type="checkbox"/>
3.	Verify the entire school year is scheduled. The SAR must have schedules for the entire school year for teachers and students. DPI will collect all data for all students, but the SAR does not require schedules for PK students.	<input type="checkbox"/>
4.	Record all Students' exceptionalities.	<input type="checkbox"/>
5.	Verify that staff members have a UID in the StatePrId field and a SSN (do not include hyphens) on the Staff information screen in PowerSchool. Refer to complete list of Staff Members on page 28.	<input type="checkbox"/>
Additional information for a complete SAR collection of data from your school		
6.	College/University and vendor class lead teachers are generic staff that can be entered with the generic staff your school currently has in place until DPI has instruction for this need. The facilitator is added as additional staff. The facilitator role can only take attendance. If entering grades and attendance is needed, use the PowerSchool co-teacher role in additional staff.	<input type="checkbox"/>
7.	Ensure the necessary Courses are available for your school. Refer to Courses section on page 7.	<input type="checkbox"/>
8.	Keep in mind that 9935 is not a subject code. All teacher and student data scheduled to the non-reporting course code 9935 will be dropped from SAR reporting. Refer to Courses section on page 7.	<input type="checkbox"/>
9.	Ensure that valid state approved course codes are used for scheduled sections of the course.	<input type="checkbox"/>
10.	The required course section attributes must be populated for each class. The required attributes are: <ul style="list-style-type: none"> • Institution Code – if not one, select DEFAULT • External Provider – if not one select None • Third Party Provider – if not one select None • Delivery Mode – select appropriate attribute • Course Length - select appropriate attribute • How Taken – select appropriate attribute 	<input type="checkbox"/>
11.	Ensure EC Students are identified in PowerSchool. Refer to EC Students section on page 10.	<input type="checkbox"/>
12.	Verify that students who are enrolled in classes at Community College, University, and/or online 3rd vendors are scheduled to the appropriate course number for the subject content.	<input type="checkbox"/>
13.	Share SAR reports with your HR staff (SAR Summary and SAR Personnel reports show which teacher is assigned to subjects to help with HQ review). Use the course crosswalk located under http://licensurepublic.dpi.state.nc.us/ to determine licenses needed for a subject.	<input type="checkbox"/>



SAR Exceptions List

List of Student Activity Report (SAR) Exceptions that may be encountered while running the Exceptions(s) reports in PowerSchool.

The table lists the Exception Code, School or LEA level, Severity, Title, Business Rule and Action to be taken to correct the exception.

Exception Code	School/ LEA	Severity	Title	Business Rule Checked	Action (Next Steps)
SAR-1	School	WARN	Number of Students in Class is Invalid	Number of students in a class = 0 Class/section must have students enrolled.	If valid and no students in the class, no action needed, otherwise delete the section. DPI will not use the data.
SAR-2	School	FATAL	Staff Missing or Invalid SSN	SSNs are entered for only the certified staff needed for the collection to verify license. DPI will only be looking for SSNs for the following staff members: <ul style="list-style-type: none"> • Lead teachers, • Counselor-Regular Funding, • Job Placement Specialist, • Social Worker/Attendance Counselor, • Audiologist, • Speech/Language Therapist, • Librarian/Media Coordinator, • EC Adaptive Voc Ed, • Single Parent Coordinator, • Sex Equity Coordinator, • Vocational Special Populations Coordinator, and • Career Development Coordinator. <p>From this group exclude the lead teachers in the "How Taken" attribute that are identified as College/University Class, Community/Technical School and Internet/Virtual School. SSNs must be 9 digits.</p> <p>Note: SSN must be the same as Licensure but do not include hyphens.</p>	If the SSN is missing, enter a valid SSN for the staff. If this is an invalid SSN, please enter a valid number.
SAR-4	School/ LEA	WARN	Duplicate Staff SSN or UID	Staff Duplicate SSN or duplicate Staff UID within the LEA/State. Each staff member must have a unique SSN and unique ID across the LEA/State.	Correct the SSN if inaccurate. If the staff member works in multiple schools in your LEA, verify that the information is accurate.
SAR-5	School	FATAL	Teacher in VPS only	Virtual Public School (VPS) courses are taught by VPS Teacher. Class sections are identified by the attribute.	Update teacher information to correct lead teacher.



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Exception Code	School/LEA	Severity	Title	Business Rule Checked	Action (Next Steps)
SAR-6	School/LEA	WARN	Staff Member Without a Role in School or LEA	Staff member in school or LEA without a role assigned. Verify that staffs working with students have the appropriate role.	Assign a role to the staff member.
SAR-7	School	WARN	Academic Level/ EC Exceptionality	Academic level of EC classes is suspect. If 5th digit of course number (Academic Level) = A or B, at least 80% of scheduled students must have a primary exceptionality.	Verify that students have a primary exceptionality on the run date of the collection.
SAR-8	School	FATAL	Self-contained code of 0000 is no longer available starting in year 2014/15.	This identifies classes with subject code 0000. As of 2014-2015, self-contained code of 0000 is no longer available.	Update student schedules to the approved course code.
SAR-10	School	WARN	Subject code for these classes are suspect	Subject codes 2000 - 2012, 3000 - 3008 and 4001-4008 should only have K-8 grade students.	Verify student grade levels.
SAR-11	School	WARN	Course Grade Level	Course Grade Level for these classes are suspect. Valid Course Grade Level Codes with associated Student Grades are: <ul style="list-style-type: none"> • P = PK-P3 • X = 09-13 • Y = 06-08 • Z = KI-5 6th digit of course number indicates grade level.	Verify student grade levels in the class against the course number.
SAR-12	School	WARN	Extended Day Course Level	Extended Day Course Level for these classes are suspect. Extended Day Admission Status students must be in the following course grade levels X or Y. (6th digit of course number). Students with Admission Status of MED1 or VED1 can only be scheduled into courses with Course Grade Level of X or Y.	Verify student grade levels.
SAR-14	School/LEA	WARN	Incomplete Master Schedule	Missing class sections in the Master Schedule. Master schedule must include all classes that will be offered throughout the year, including Year Long, S1, S2, T1, T2, T3, Q1, Q2, Q3, Q4 if those terms are defined in Years/Terms in PS.	Verify master schedule is complete for all terms and students are scheduled.
SAR-15	School/LEA	WARN	School Calendar Incorrect Days	The number of school days defined for the school is less than 185. Schools calendars must have 185 instructional days defined or 1025 instructional hours.	Verify school calendar has all instructional days defined. If the Instructional Hours are 0, define the Daily Instructional Minutes in School > PMR Instructional Minutes Setup.



Appendix

Exception Code	School/LEA	Severity	Title	Business Rule Checked	Action (Next Steps)
SAR-16	School	WARN	Assigned/Not Assigned Staff Roles	Schools should have staff assigned to the roles of Asst. Principal, Librarian/Media Coordinator and Teacher Assistant.	Verify that this information is valid.
SAR-17	School/LEA	WARN	Missing Principal Role	School does not have Principal.	Assign a staff member to the Principal role.
SAR-18	School	WARN	Non Reporting Course Code	Classes with subject code 9935 are scheduled. 9935 should only be for non-reported subjects that do not have a valid state course code. The 9935 non-reporting code sections will be dropped from the SAR.	If this is not a homeroom or a non-reporting class, you should change to a valid course subject code to avoid having the data dropped from your SAR Data Collection. For scheduling homeroom, use the valid code of 9932 to avoid this exception in the future.
SAR-19	School	FATAL	Enrolled Students without Schedules	A student is enrolled but he/she does not have any scheduled sections. All enrolled students must be scheduled into classes.	Schedule students into classes.
SAR-20	School	FATAL	Duplicate Teacher Assigned to Self Contained Class	Personnel assigned to multiple self-contained classes. Teacher can only be assigned to teach one section of self-contained class (subject area 0000).	Scheduled the teacher to the correct course number. NOTE: With 0000 not being an active course starting 2014/15, schools should not be getting this exception.
SAR-22	School	WARN	Incorrect Class Assignment for Role SA	Supervising adult (SA) is assigned to a non-physical education class as an additional staff member Role SA can only be assigned to course subject area 9001.	Remove the SA from the incorrect class.
SAR-23	School	WARN	Teachers Without Assigned Duties of Lunch and Planning	No staff duties assigned to teachers for the current school academic year. All teachers are required to have a lunch and planning duty.	Assign Lunch to the teacher and/or planning.
SAR-24	School	WARN	Teaching Related Roles with No Class Assignments	Personnel with staff roles assigned (e.g., SA = Supervising Adult) and are not associated with a class section.	Correct the role or assign classes to the staff member.



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Exception Code	School/LEA	Severity	Title	Business Rule Checked	Action (Next Steps)
SAR-25	School	Fatal	Expired or Invalid Course Code	Inactive or ended course class sections have been scheduled in PowerSchool. The likely cause would be converted data. Inactive or ended courses cannot be scheduled in the Master Schedule.	Create new section using valid course code and transfer students. Note: This error may not show in the current PowerSchool version; use the steps above to correction this exception.
SAR-26	School	FATAL	Class Without Expression	Class/section without Period/Day. Class/section must have expression entered.	You must set up the Period/Day/term for classes.
SAR-27	School	FATAL	Students only scheduled in Homeroom	Students must show instructional time in their schedule. Homeroom (9932) does not represent instructional time.	Schedule students with instructional class time in addition to homeroom. Homerooms are for non-instructional time only. Please note that non-reporting codes are dropped from SAR data (classes starting with 9932).
SAR-28	School	WARN	Students who are withdrawn and have no schedule	Students who have no schedule and have an exit code and exit date prior to the SAR report run date should not appear in the SAR.	Verify data.
SAR-29	School	FATAL	SSN of all 9's	SSN of all 9's is valid as a temporary SSN.	The temporary SSN must be updated with the valid SSN.
SAR-30	School	FATAL	Class period minutes =0	The SAR must have minutes attached to the class period to assist in identifying the length of the class.	The period selection for the class is identified as having 0 minutes. Correct by adding the period, start and end time to the bell schedule.
SAR-31	School/LEA	FATAL	Student missing admission status	All students must have an admission status.	Enter the student's appropriate admission status for the current school enrollment.
SAR-33	School	WARN	Required Section Attribute Missing	Schools should have the SAR required attributes setup for classes that the attribute is related to. Such as all classes would have course length, a delivery mode and a how taken selection. Additionally, courses such as college, university, vendor, NCSSM and NC Virtual Public School (NC VPS) would have provider attributes and the possible institution code.	Verify that this information is valid and populated as required for accurate reporting of the individual course section.



Appendix

Exception Code	School/LEA	Severity	Title	Business Rule Checked	Action (Next Steps)
SAR-34	School	FATAL	Teachers listed are either missing their UID or their SSN	<p>All Lead teachers must have a UID in the StatePrID field and a SSN.</p> <p>The following staff member must have a UID:</p> <ul style="list-style-type: none"> • All Lead teachers, • Counselor-Regular Funding, • Job Placement Specialist, • Social Worker/Attendance Counselor, • Audiologist, • Speech/Language Therapist, • Librarian/Media Coordinator, • EC Adaptive Voc Ed, • Single Parent Coordinator, • Sex Equity Coordinator, • Vocational Special Populations Coordinator, and • Career Development Coordinator <p>From this group exclude the lead teachers in the "How Taken" attribute that are identified as College/University Class, Community/Technical School and Internet/Virtual School that are not listed in the "Course External Provider" attribute as NCVPS.</p>	Populate the missing UID and/or SSN.
SAR-35	School	WARN	Staff without email address	<p>PowerSchool will be used as the authoritative source for staff email addresses. DPI will only look for emails for all active staff members.</p> <p>From this group, exclude the lead teachers in the "How Taken" attribute that are identified as College/University Class, Community/Technical School and Internet/Virtual School that are not listed in the "Course External Provider" attribute as NCVPS.</p>	If the staff email is missing, populate the work email for the staff member on the Staff Information screen

Frequently Asked Questions (FAQs)

This section contains frequently asked questions categorized as follows:

- [SAR Exceptions](#)
- [Staff UID & Roles](#)
- [Courses](#)
- [Bell Schedules](#)

SAR Exceptions

Q: *If my SAR is ok, can I approve now?*

A: Do not approve the SAR until close to the collection cutoff end date or until DPI sends approval notification. With additional updates during maintenance weekends, DPI is requesting that you re-run your SAR once maintenance weekend is complete if SAR functionality has changed that will affect your data. Review your data again. No further action is needed if you are satisfied with your SAR report results after the re-run. DPI will collect that data (if approved or not) once the deadline collection has passed. The SAR reports are:

- [SAR Summary](#)
- [SAR Detail](#)
- [SAR Personnel Summary](#)
- [SAR Class Overage](#)

Q: *How do we correct SAR-27 exception only scheduled home room for visiting students?*

A: All students must have instructional time scheduled. Homeroom is not instructional time. If these students are PK, you can schedule a non-reporting class (9935) for them. All others should have accurate subject content classes scheduled. For a complete list of Exceptions, refer to [SAR Exceptions List](#) on page 22.

Q: *I have a number of warnings under SAR 4 but do not see where the SSN/UID is duplicated for the students listed. I looked on their information screen and the data appears to be correct, but at one school for example, almost every teacher shows up under this warning. Where should I check, or what should I do?*

A: Staff may be listed here if they work in more than one school in your LEA. If that is not the case, contact [Home Base Support Center](#) to remove duplicates that may have been a result of the NC WISE to PowerSchool conversion.

Q: *My teachers are showing in edit SAR-6.*

A: Pearson had to update the software to recognize roles attached to staff. Verify that roles are populated and ensure that the start and date for the role is the same as the current school year's in-session start and end date.

Q: *With SAR 15, if we have less than 185 days, where do we check to see if we are meeting our 1025 hours?*

A: The number of instructional days comes from your calendar setup in PowerSchool. The instructional minutes come from the bell schedule. Due to schools having the option for multiple bell schedules, your instructional hours may not look correct in PowerSchool at this time. Ensure that the bell schedule is set to say 'Yes' for the SAR calculations of instructional minutes. Refer to [Calendar Setup](#) on page 6.

Q: *Is the data still only looking at a screenshot of data at the end of Month 2 or ongoing through May 15?*

A: The SAR data is looking at the entire school year. The data reflects information as of the collection date. The collection period starting next year will cover all possible 40th day dates in the state from all schools.

Staff UID & Roles

Q: *Can you change the name of the teacher under the NC Virtual Public School (NCVPS) sections? Does it affect the attendance?*

A: Per Pearson, you can change the name of a teacher without affecting the attendance details of the class, although the results are not the same when changing the stored grade/teacher.

Q: *Where can we find the NCVPS SSN, since VTIN # is no longer used?*

A: VPS Staff no longer need the SSN in PowerSchool. Schools will use the correct UID for the VPS teacher.

Q: *Do all staff members need to have a SSN? What do we do about DPI staff?*

A: As of the May maintenance update, the SAR-2 exception will only look for the following certified staff needed for license validation:

- Lead teachers
- Job Placement Specialist
- Audiologist
- Librarian/Media Coordinator
- Single Parent, Coordinator
- Vocational Special Populations Coordinator
- Counselor-Regular Funding
- Social Worker/Attendance Counselor
- Speech/Language Therapist
- EC Adaptive Voc Ed
- Sex Equity Coordinator
- Career Development Coordinator

If you have staff members associated to your school that are teaching a virtual class that was created by your school or another school system, then enter that staff members' SSN and the attributes that would identify the methods of class delivery for each section. Refer to the **DPI Employee Cleanup for SAR-2 Exception (QRD)** (located under http://www.nc-sis.org/school_information.html).

Note: If you are missing a leading 0 in the SSN, you must update the SSN to show all leading 0s. SSNs are entered on the core screen of staff information. For a complete list of Exception reports, refer to [SAR Exceptions List](#) on page 22.



Q: We already had some NCVPS teachers, but then DPI loaded them again and they have different UID numbers?

A: We recommend using the most up-to-date UID number if the VPS staff has a different UID than in the past. If you are unsure of which number to use, contact [Home Base Support Center](#) for assistance.

Q: What should we use for vacancy?

A: If you do not have a staff member hired for a scheduled class, you must put in a sub to cover the class. If the vacancy is due to a teacher being on long-term leave (4 week or more), follow the policy below if:

- a. A long-term (4 consecutive weeks or more) substitute is assigned to a class: The Substitute should become the teacher of record replacing the original teacher. The substitute should be entered in PowerSchool as the teacher of record for the class and they will need to meet Highly Qualified (HQ) teacher requirements.
- b. Multiple short-term substitutes are used for a class and there is no original teacher of record for the class: The substitute in the classroom each time the SAR data extraction is done for the school should be the teacher of record in PowerSchool for the class. They will need to meet Highly Qualified (HQ) teacher requirements.
- c. Multiple short-term substitutes are used for a class and there is an original teacher of record for the class: The original teacher of record should remain in PowerSchool as the teacher of record for the class.

Q: For sections with more than one licensed teacher - do both have to meet HQ requirements to be lead teacher or only one? Or should we use co-teacher for one who shares a section but does not meet HQ requirements?

A: The teachers working with a class equally should be listed as lead teachers. The co-teacher role in PowerSchool is not a DPI defined role and will not be looked at for HQ or lead teacher status. All lead teachers indicated for a course section (class), are looked at for HQ. If the first lead teacher has all licenses needed to meet HQ, the class will be HQ. If not, a second teacher will be checked for HQ needs.

Note: The population of the class is also looked at for SAR reporting for EC needs.

Q: Additional Staff at the section level – is the percentage of time referring to the percentage of the staff's day spent in the class vs. percentage of the day?

A: The percent of time for a course section for an additional staff member is the percent of time spent in the class for that individual section.

Additional information for percentage of time or duration of time for roles and duties are populated from the staff information screen. If entering a percent of time, it should represent time for an instructional day. Duration is entered as minutes for the instructional day.

Q: In an EC relationship, if two content teachers share a section (i.e., Social Studies), but the second teacher is only English Language Arts (ELA) certified, what role should they be assigned? Co-teacher, lead 2?

A: If the second teacher is needed for HQ of the class due to the academic level or the population of the students in the class, you would assign the role of TE2, 3 or 4 to the additional lead teacher. Any other role in the additional staff area will not be looked at for SAR reporting as a lead and therefore not be used for HQ needs. Assigning a second lead teacher for any reason would also be handled in this way. If you are attaching a facilitator to the class for entering grades and/or attendance, keep in mind that the facilitator is not a lead teacher and should not be coded as one. Put the facilitator in a 'Facilitator' role to not inflate the list of lead teachers.

Q: Should Elementary Teacher Assistant (TA) be assigned to all the core classes?

A: TA must be assigned to all course sections that they work with.

Q: If a NCVPS class has a student with EC needs in a class shared with a student who does not have EC needs, will I need to enter 2 courses for that NCVPS course, one with the EC teacher and one without?

A: No, if the students have the same VPS course and the same teacher, they can stay in the same course sections scheduled. If the EC teacher is needed for HQ and instructional assistance, the EC teacher will be added as the additional lead teacher for the class.

Q: Is the NCDPI Screen, Staff Info Certified Name information being reviewed for SAR?

A: No, PowerSchool uses the first, middle and last name of the staff member to format the certified name needed for license requirements.

Q: Is there a role for just Teacher or is that a given? Other occupational roles are listed except a plain Teacher role.

A: When the lead teacher is assigned to a course section during setup, a role of teacher (TE) is assigned to that staff member. When you assign additional staff to a course section, you assign staff roles accordingly.

Q: What is a planning period?

A: Planning is assigned to teachers as a duty from the staff information screen. The planning period is a time for teachers to work on task for class preparation. NCVPS teacher do not need a planning duty assigned.

Q: What do you do with non-scheduled teachers?

A: The non-scheduled instructional support staff members are indicated with duties on the staff information screen.

Q: If the librarian is scheduled, should they be added with a role also?

A: Yes, if the librarian serves as a teacher in a class and is the school's librarian. The librarian role will be entered from the staff information screen.



Q: *What dates would you use for your start and end dates for roles?*

A: Use the start and end dates for your school year unless that staff member's start and end dates are not the entire school year.

Q: *Are SSNs 999-99-9999 valid?*

A: No, the 9's SSNs are only a valid temporary solution for staff that do not have a SSN but are waiting for the government to issue one. The 9's must be updated for the actual SSN for that staff member for accurate reporting.

Q: *How do I fix duplicate student/staff records?*

A: Please contact [Home Base Support Center](#) to resolve duplicates.

Courses

Q: If a section is defined as maximum students 29 and there are 30 students, PowerSchool creates an error on SAR. Can they change the maximum enrollment to 30?

A: You can change the maximum enrollment in your PowerSchool instance. The school user at the course section level controls the maximum enrollment number. Refer to the **Student Activity Report (SAR)** policy located under <http://www.ncpublicschools.org/fbs/accounting/manuals> for class size requirements.

Note: If the school uses PowerScheduler, the maximum will be populated in order for PowerScheduler to determine the number of students to assign to a section.

Q: I have talked to DPI many times this year and I have been told we didn't have to put "how taken" because they weren't transferred over, so now you're saying it has to be in for the SAR this year?

A: The 'How Taken' attribute has only recently been put in PowerSchool. Due to the course update for 2013/14, the six attributes should now be populated in course section to help identify the various needs of teachers and how instruction is delivered. The required course section attributes must be populated for each class. The required attributes are:

- Institution Code – if not one, select DEFAULT
- External Provider – if not one select None
- Third Party Provider – if not one select None
- Delivery Mode – select appropriate attribute
- Course Length - select appropriate attribute
- How Taken – select appropriate attribute

Q: If we define attributes at the Course level, will they populate the Section level?

A: Currently, attribute course level data does not transfer to the course section level.

Q: Will not having attributes result in fatal errors?

A: Not having attributes will not give a fatal exception but, if it is missing from various course sections, your data will not report accurately (for e.g. college/university/technical school and vendor courses will be reported as face-to-face/in-seat classes with staff expected to be HQ and from your school's staff payroll).

Q: For 'How Taken' attribute - do we have to populate the regular day on all the "normal" section records or just the exceptions such as internet virtual or community college?

A: You should populate the "normal" sections with a 'how taken' of Regular Day or Classroom. In 2013/14, we did not do this due to reporting time and attribute population. But moving forward, attribute must be setup as needed for individual sections. Additional information on attribute population – Be sure that you indicate the 'How Taken' of Internet/Virtual School for all sections that are taught by vendors or on-line courses – this affects the SAR-2 exception. If you have a vendor for recovery courses and do not see the vendor in the Third Party Provider List, leave the Third Party Provider as 'none' but select the 'How Taken' attribute as 'Internet/Virtual School'.

Q: How can we check to see if the attributes are all populated?

A: SAR-33 will show course sections that are missing one or more of the six attributes needed for SAR.

Q: If we are an alternative high school, do we have to change the attribute of every course and section as Alternative Learning Program (ALP), even if the students have already been assigned a special program as ALP this year?

A: No, not for the SAR. Setup the course length and the other attributes that would identify if they are non-classroom, non-school staff, non-in your school building settings.

Bell Schedules

Q: What is the 'Use for SAR Calculation of Minutes' box on the bell schedule? What should we select if we only have one bell schedule?

A: This setting is located within each bell schedule – refer to the [Bell Schedule](#) section on page 6. All schedules that need to be included in the SAR/Principal's Monthly Report (PMR) calculation of instructional time should have this setting as 'Yes'. Pearson suggests if you have:

- Only have one bell schedule - set the drop-down menu to 'Yes'.
- Multiple bell schedules - set the appropriate bell schedule setting to 'Yes' and the other bell schedules to 'No'. If no selection has been made, it will be considered as 'No'.

Q: Are there character limitations on Period Name and Abbreviation?

A: Currently in PowerSchool 7.11, the Period Name and Abbreviation fields are limited to 80 and 3 characters, respectively.

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