



TERMS Symposium

School Counseling

August 2023

Updated Withdrawal Procedures



- Must Use BASIS Withdrawal Form
- A School Counselor/Designee should meet with the parent/guardian and student (when appropriate) regarding the withdrawal and conduct an Exit Interview regarding the reason for the withdrawal
- A School Counselor or Designee should advise the parent(s) of any options that may be available and discuss the implications of the withdrawal when appropriate.
- Reason for Withdrawal **MUST** be documented in BASIS and TERMS

To Document the Reason for Withdrawal in TERMS

```
PANEL: _____ A04. GENERAL ASSIGNMENTS (PK-12) YEAR: 24
STDT: _____ SCHL: _____ GR: _____ ST: _____
HOMEROOM HOUSE/TEAM COUNSELOR SCHL GR AS-SCHL CAL
CUR: _____
NXT: _____
LST: _____
WL FCS FIC IAP
LUNCH NO:
REASON FOR LEAVING LENG: 1 ATTR: N REQ: Y
REASON FOR A STUDENT LEAVING THE DISTRICT
1 - ACADEMIC 7 - AFTER SCHOOL CARE
2 - ESE SERVICES 8 - EXTRA CURRICULAR ACTIVITIES
3 - TRANSPORTATION 9 - OTHER
4 - MORE CONVENIENT M - ADDRESS CHANGE (MOVING)
5 - SCHOOL ADMIN SUPPORT V - FULL TIME VIRTUAL SCHOOL
6 - SAFE/SECURE LEARNING ENVIRONMENT
PF2=EXTENDED HELP 3=EXIT 7=BKWD 8=FWD
```

To Create a Withdrawal Form in BASIS:

1. Search for the student on the Main BASIS grid
2. Once the student's name appears, double click on that student to bring up their BASIS record.
3. On the "View" dropdown, Select "Withdrawal Forms"
4. Select "Create Withdrawal Form"
5. Complete all required information on the Withdrawal Form including the "Reason for Leaving"
6. Click the "Save and Close" button
7. Once you select "Save and Close", you can view and print the Withdrawal Form for the parent to sign and place in the cumulative folder.

DNE: Did Not Enter

- * Students with 5 Unexcused absences for the first 5 days of school will be DNE'd.
 - * Reports in Optispool 8/28/23
- * Schools must resolve and UPDATE the withdrawal code for ALL DNE students.
 - * Phone call, Email, SSW, etc
- * Use BASIS to keep track of DNEs

Summer Experience Grades

- * Grades were posted for Summer Experience
 - * Some Issues. If you see a student attended summer and there is no grade on the A13, check pinnacle and manually enter the grade.
- * Middle School Classes
 - * Term 3 with a “P” if final grade was 60 or higher in pinnacle.
 - * Only Credit Recovery classes
- * High School Classes (including HS classes taken in MS)
 - * If final grade was 60 or higher the actual letter grade was posted to the A13
 - * Elective classes did not get a grade for Summer

Final Transcripts

Issue: Schools tell students they did not receive the transcript

- * Did the Transcript go through?
 - * Check Go8 Panel in TERMS and Optispool Reports
- * Was the transcript rejected?
 - * Optispool Edit Error Report SRTS03

```
PANEL: _____ A03. DEMOGRAPHICS YEAR: 21
STDT: [ ] KEY: _____ TYPE: _____
LAST APP FIRST MIDDLE AKA AFFIRMED FIRST
RESNBR DR STREET TYPE APT/BLDG CITY ST ZIP+4 RES CY
FL 06
GEN RACE: E W B A I P DOB BIRTH PLACE VER A PHONE FLEID
N N N N N N 1 Y
ENT DATE SCHL GR AS-SCHL CL W/D DATE PR R M SSN EXTRNL NBR ALIAS NBR
00000000
ELL LAN PAR MG CO LG SRVY LC IM DT US SCHL EN:DS-SCHL PRIOR: DIST STATE CNTRY
ZZ EN EN N 00000000
C R MC MA EX MFS BC STDT TC AV PR DUE DATE DP B WR PUB:M P B E C ORIG
Z 3 Z Z Z I Z Y Y N N N
F1=HELP 3=EXIT 4=PROMPT 7=BKWD 8=FWD 9=NXT PAGE 12= ESCAPE
Please type key elements. TERML: QPADEV
```

Using Optispool Edit Error Reports to identify errors in TERMS that are preventing transcripts from reaching other schools or colleges. (SRTS03 EDITERR Report)

- * Information gets entered into our student information system (TERMS) through a variety of ways. Information can be entered manually by a person or it may be imported by Information and Technology staff (ex: grades from pinnacle). Sometimes, information will get entered in TERMS incorrectly, or in some cases omitted altogether. In either case, these types of errors can cause a transcript to not make it electronically to its destination such as another PK-12 school in Florida, a college/university, or Bright Future Scholarships.
- * Take a look at the three examples below. Each of them has a data entry issue. These were transcripts that were being sent electronically to Bright Futures Scholarship and Palm Beach College and FIU. The transcripts did NOT make it to the destination because there were issues. You would need to correct the issue(s) identified in the report and resend the transcripts to the destination. If you are not sure how to correct the data error, reach out to Taffy Armstrong, District IMS.

SEQ	--RECORD TYPE--	--- <th>-COLUMNS-</th> <th>--VALUE SENT--</th> <th>-----DESCRIPTION OF ERROR-----</th> <th>-REF#</th>	-COLUMNS-	--VALUE SENT--	-----DESCRIPTION OF ERROR-----	-REF#
001	IMMUNIZATION:	VACCINE DATE (14)	0173-0180	19970230	MUST BE "EXEMPT " OR VALID YYYYMMDD; NOT FUTURE	10
001	IMMUNIZATION:	S0	X	063011		

SEQ	--RECORD TYPE--	--- <th>-COLUMNS-</th> <th>--VALUE SENT--</th> <th>-----DESCRIPTION OF ERROR-----</th> <th>-REF#</th>	-COLUMNS-	--VALUE SENT--	-----DESCRIPTION OF ERROR-----	-REF#
001	IMMUNIZATION:	VAC CERTIF EXP DT	0033-0040		EXPIRATION DATE MUST BE VALID (YYYYMMDD)	8
001	IMMUNIZATION:	S0	X	063011		

- * If you would like to go back in Optispool and check past reports, you can do that! Here is how...
- * Go to web/optispool and sign in with your TERMS ID
- * Once signed in, click on the "Query ??" section. A pop up will appear.
- * In the Extract section, choose CT (for contains) and type in SRTS in the box. This will give you a report of every SRTS report that was sent to your school.

The screenshot shows the OptiSpool Web interface. On the left, there is a 'Query' form with fields for Folder, User Id, File Name, Date (yyyyymmdd), Page, Extract, and User Data. The 'Extract' dropdown menu is open, showing options: EQ, NE, GT, GE, LT, LE, and CT. The 'CT' option is circled in blue. The 'User Data' field contains 'SRTS'. On the right, a table displays the query results with columns: NAME, USER ID, DATE, PAGES, USER DATA, and FORMEXTRAC. The table contains multiple rows of data, including dates from 01/06/2020 to 10/29/2019 and user data 'MMSRTS03'. A 'Query ??' button is also circled in blue in the top right of the interface.

NAME	USER ID	DATE	PAGES	USER DATA	FORMEXTRAC	
TS03	PG0500001	01/06/2020		MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/20/2019	21	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/19/2019	61	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/17/2019	48	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/16/2019	48	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/13/2019	48	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/10/2019	57	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/09/2019	52	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/06/2019	53	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/03/2019	74	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	12/02/2019	46	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	11/21/2019	49	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	11/20/2019	47	MMSRTS03	*STD SRTS03 EDITERR	
TS03	PG0500001	11/19/2019	56	MMSRTS03	*STD SRTS03 EDITERR	
MMSRTS03	MMSRTS03	PG0500001	11/18/2019	46	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/15/2019	41	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/13/2019	64	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/12/2019	48	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/08/2019	56	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/07/2019	52	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/06/2019	56	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	11/01/2019	44	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	10/31/2019	57	MMSRTS03	*STD SRTS03 EDITERR
MMSRTS03	MMSRTS03	PG0500001	10/29/2019	68	MMSRTS03	*STD SRTS03 EDITERR

Registration

- * Welcome families back!
- * They're afforded 30 days to get their paperwork in order.
- * Don't send them back and forth between schools.
- * Pick up the phone to ensure it is the right move and somebody is expecting them to arrive.
 - * Over enrolled schools can be more diligent but be sure to resolve the issue before they leave.
- * Grade level placement can be referred to the School Counseling Department's respective level specialist.

Middle School Late Promotions

- * Middle Schools: If you have an 8th grader student that you promoted after the Rollover.
 - * Add promotion code on A03
 - * Withdraw the student
 - * Email the high school IMS and School Counseling Director the student name and inform them that the student was promoted, and they should pick up the student and create a schedule for the student.
- * High Schools: Check with your feeder school counselor to see if students were promoted after being retained