

1. **Discipline:** Temporary expulsions without services should be exited/withdrawn according to the expulsion order. This is a change in recommendation from DPI. Under ISES it was believed that holding the enrollment in place served to remind LEAs when a student was legally required to be re-enrolled if not enrolled elsewhere. Under WISEdata, because the student is not receiving educational services, the enrollment should end on the school day before the expulsion order begins.
2. SSEPA End Dates can and should be dynamically changed based on new IEPs starting. sSEPA Begin and End Dates are not considered to be official parts of the IEP form by DPI. SIS vendors should adjust sSEPA End Dates based on new IEP records as they are entered into the SIS. DPI recommends that sSEPA Begin and End Dates be generated and recalculated by the SIS. Users in the majority of cases should not manually edit or be required to enter sSEPA dates.
3. IEP Locking/Work in Progress/Achieved/Finalization process should be ignored for state reporting for records that are active based on service Begin Date.
 - a. Any IEP that has started should be reported to the WISEdata system regardless of its in-work status. This is to avoid causing school staff to need to finalize IEP records that are still being edited just prior to a WISEdata Snapshot date and then re-open the IEPs once the snapshot is complete.
 - b. In-work IEPs that are active reflect the best information that is available at the time and are appropriate to snapshot.
4. Completed School Term, Third Friday of September Countable Status, October 1st Child Count Countable Status, and all other SIS-calculated or defaulted data element values must be overridable by the user.
 - a. DPI recognizes that Defaulting and Mass setting of state reported data elements is a significant time saver for school staff. However, there are always exception use cases where the calculated value may not be the appropriate value to report for a handful of students.
 - b. DPI requests that all SIS vendors build in functionality that allows school staff to directly enter the value that will persist and that will be reported to DPI for the following data elements.
 - i. Completed School Term
 - ii. TFS Countable Status
 - iii. Oct. 1 CC Countable Status
 - iv. Private School Choice Participant Indicator
 - v. Economically Disadvantaged Status Indicator
 - vi. Food Service Eligibility
5. Locally Defined Exit codes should map to state Exit Types. DPI recommends and considers it a best practice for
 - a. SIS vendors to provide functionality that allows schools/districts to define locally any exit code/description the agency wishes.
 - b. SIS vendors to provide functionality that allows schools/districts to map the set of locally defined exit codes/description to the set of DPI Exit Types defined in the Ed-fi API.

- c. Examples of Potential Local Exit Codes Mapped to DPI Exit Types.
- i. These examples are intended to show the need for detailed exit reasons at the school and how these codes would map to DPI Exit Types. Allowing schools to define local exit codes and then mapping them to state codes is recommended as a best practice. This list is not comprehensive.

Local Exit Description	DPI Exit Type
Advancing to next school level--continuation confirmed at new school	TC
Advancing to next school level--expected to continue at new school	ETC
Advancing to next school level--expected to continue at new school and student is below 6 years of age.	BCA
Completed high school and continuing to receive services next year	TC
Completed high school and expected to be continuing to receive services next year	ETC
Completed high school by reaching Maximum Age--No credentials received	MA
Completed high school with credentials and no longer receiving any services in the future	HSC
Completed school year--continuing next year in same school	TC
Completed school year, expected to continue next year in same school	ETC
Completed school year, expected to continue next year in new school	ETC
Exiting program and student is below	BCA

6 years of age.	
Expelled--Completed this school year, expected to continue next year	ETC
Expelled--Continued schooling in a school covered by WISEdata	TC
Expelled--Continued schooling in private school/home-based education	TNC
Expelled--Did not complete this school year, no evidence of continued schooling	ODO
Family moved out of district--Stayed in Wisconsin, expected to continue schooling in new school	ETC
Mid-term withdrawn with no evidence of continued schooling	ODO
Runaway with no evidence of continued schooling	ODO
Student died	DE
Student open enrolled out of district	TC
Transferred out of Wisconsin--Stayed within USA and Territories for home-based education	ISM
Transferred to home-based education	TNC
Transferred to private Choice school--Out of District	TC
Transferred to private Choice school--Within District	TC
Transferred to private school in state--Out of District	TNC
Transferred to private school--Out of State, transfer letter or records request has been received	TOS
Transferred to private school--Out of	TC

State, transfer letter or records request has been received--RETURNED to a school covered by WISEdata	
Transferred to private school out of Wisconsin, stayed within USA and Territories, no transfer letter and no records request has been received	ISM
Transferred to public school--Out of State, transfer letter or records request has been received	TOS
Transferred to public school--Out of State, transfer letter or records request has been received--RETURNED to a school covered by WISEdata	TC
Transferred to public school out of Wisconsin within USA and Territories, no transfer letter and no records request has been received	ISM

6. **IEP Copy Functionality:** School staff with the necessary privileges/access within the SIS should be able to create a NEW IEP by copying forward all of the content contained in an existing/prior IEP in a single action. Forcing the users to navigate back and forth cutting (Ctrl-C) and pasting (Ctrl-V) content from one screen to the next introduces many chances for human error and puts completed IEP records in danger of being accidentally edited.
7. If the SIS allows for editing finalized IEP records, the default method to access the IEP content should not allow/open the record in an editable fashion through interface behaviors that are common to modern operating systems. For example, double-clicking a finalized IEP should open that IEP in a read-only manner. An additional, non-trivial action should then be required of the user to open the IEP in a mode that allows for editing and re-finalizing the record.
8. **Facilitating Transition to a New Vendor:** Inform customers of limitations on data availability based on contracted services. Provide transparency regarding data which will and will not be transferred between SIS systems during a migration.
9. Facilitate continuous reporting of 3 years of student data by allowing modification of data in the current and 2 prior school years.
 - a. Vendors must be able to maintain year-based code sets (descriptors/types) because code sets do change from year to year (e.g., 2017-18 and 2018-19 course code lists are different).

10. All records that are submitted to DPI, including records for students that have been withdrawn or were sent in prior years should remain findable/editable by SIS users. This is to ensure that should a data quality issue be discovered some time in the future, school staff can edit records their school/agency submitted to the state without having to contact a vendor for support with "inactive" records.
11. Food Service Eligibility and Economic Disadvantage Indicator are separate data elements and should be collected separately and displayed to users of the SIS as separate items to view and override.
12. Choice schools may have determined that a student has [Primary Disability or Secondary disability](#) through their own methods or by reviewing a student's education records. However, due to state reporting requirements for Choice schools, the values maintained by the schools in the SIS [may not be eligible](#) for reporting to WISEdata. SIS vendors should allow schools to keep the data within the SIS and provide a mechanism/override that prevents any disability information from being reported. DPI also recommends that SIS vendors provide reports to users that allow staff to compare SIS data to state-reported data reported to assist with verification. Any such reports should take the override previously mentioned into account.
13. Real-time transactional sending of updates to WISEdata should be kept ON for the current year and the prior year.
 - a. From June to December (Year End Snapshot date) schools need to work frequently in both the current year and prior year. Allowing the system to send changes to the WISEdata system for both years as quickly as possible and without the need for a manual step will reduce user confusion and frustration when preparing for the snapshot.
 - b. If it is not possible to keep the sending of data real time, the vendor should make sure that daily jobs are scheduled to maintain timely reporting of current and prior year data changes to WISEdata.
14. Compare data already accepted by the API to records being sent to avoid unneeded transactions and L1 Error Messages. Bulk operations using the get or get by example methods allow for pulling down many if not all records from the API for comparison to local data.
15. With the Implementation of #14, the same comparison logic should be used to give users the ability to delete records that remain in the API but would no longer be sent by the SIS (Send Delete Transactions for "Ghost records" no longer found in the local sis).
16. **Legal and Preferred Names:** To accommodate students' preferences for the name by which they'd like to be referred at school, we recommend the SIS have two fields: Legal Name and Preferred Name. Legal Name should be derived from a documented source, such as a birth certificate, and would be used only for State reporting purposes or if no Preferred Name is entered. Preferred Name would be the field to enter the name a student chooses and would be visible for school operations, such as attendance, class rosters, assessment labels, etc. For transcripts, a best practice would be to include both Legal and Preferred Name in order to ensure the correct student identification.