

School Activity Report (SAR)



*S A R GUIDE
2015/16*

*NORTH CAROLINA DEPARTMENT OF PUBLIC INSTRUCTION
INFORMATION ANALYSIS AND REPORTING*

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Overview of SAR Data Collection

The SAR is a collection of data from each North Carolina public school. The collection will include scheduled activities of teachers and students, support staff activities and non-classroom activities for the school staff. Review of the SAR data is critical for accurate reporting needs as the data is used for various areas of reporting and data request.

The SAR data is used for the following:

- Statistical Profile
- North Carolina State Report Card
- Class Size Reporting
- Highly Qualified Teacher Reporting
- General Media Data Requests
- General Assembly Request
- No Child Left Behind (ESEA Compliance)

As of 2013/14, the SAR data collection started being reviewed and collected from the PowerSchool student information system. Students must have complete schedules for the school year. Accuracy of the SAR data received at the DPI will depend on the school level review.

Validation of data will be from field entry restrictions but also through a report run process that will identify data issues in the form of:

- **Information only,**
- **Warning** and
- **Fatal** exception.

All three levels of exceptions must be reviewed. The run process of the SAR can be done prior to the collection period dates set in the software.

DPI strongly recommends running the SAR often and as early as scheduling of students is complete for the current school year. Early cleanup will assure the accuracy of the data and to meet the data collection deadline.

Once the school is past the second school month the SAR collection starts. Data with fatal exceptions are not included in the data collection; therefore all fatal exceptions must be resolved before the collection deadline.

NOTE: Due to G.S. 115C-12 Section 3. (b) IIS Reporting, state reporting procedures have changed and DPI may collect any information that is necessary for compliance with state or federal law through the implementation of the PowerSchool application or any other component of the Instructional Improvement system (IIS) developed by the Department of Public Instruction.

Note to Coordinators: Starting with the implementation of PowerSchool in school year 2013/14, DPI will not submit SAR edits back to the schools for review. It will be the responsibility of the school to verify the SAR data within PowerSchool, before it is approved to DPI.

Time Line

The SAR is due after the second month of the school year. Collection of the data will continue up to 2 calendar weeks after the second month. The collection period for the SAR will take into consideration the end of the second month for all N. C. public schools. Updates of the collection period by the NC DPI may be necessary due to various report needs.

**The collection period for 2015/16 will be
September 2 – November 13, 2015.**

Definition

The School Activity Report (SAR) is a collection of data that shows an individual school's full year academic schedule, courses offered, enrollment in classes, length of classes, and staffing of classes. Activities for certified personnel and selected non-certified personnel are reported in this data collection process.

Reporting Requirement G.S. 115C-47(10)

At the end of the second month of each school year, the local board of education, through the superintendent, shall file a report with the State Board of Education, in a format prescribed by the State Board of Education, describing the organization of each school, the duties of each teacher, the size of each class and other such other information as the State Board may require.

Procedure

All reporting schools must run the SAR collection.

All **fatal** exceptions must be reviewed and corrected before the data collection.

All warnings must be reviewed for accuracy. If incorrect, update/correct as needed before finalizing the SAR data. If the data in the warning is accurate, no action is required before the data is collected.

All **information only** exceptions are to be reviewed. If the data is accurate, no action is required before the data is collected.

Once the data has been run in PowerSchool and reviewed, the data must be approved within 24 hours. If not approved within 24 hours, the data must be re-run to see an approval button.

NOTE: Schools are reminded that if the data is due, DPI can collect the data for use as needed for compliance reporting.

Schools may begin running the SAR collection from the beginning of the current school year once the school is setup and school has started. Data must not be considered final until after the end of the 2nd month of school. As suggested in the overview section of this document, running the SAR can assist with data cleanup to meet the SAR deadline.

School Activity Report Content

NOTE: For specific course code assistance, please submit a Remedy ticket with the course question or a course request.

For HQ requirements and assistance, please contact your HR staff or the Federal Program Monitoring and Support Division of DPI 919-807-3959. The subject crosswalks can be found at <http://licensurepublic.dpi.state.nc.us/>

Personnel

All personnel who are employed, or contracted by the Public School System, who have direct or virtual student contact, in a public school environment, carrying out a classroom or non-classroom activity, for which a state course code or personnel assignment type exists, must be included on the SAR.

Classroom Activity

Classroom activities must be scheduled using the tools of the PowerSchool software. Classroom activities are defined as activities that: 1) have a state subject code, 2) have a clearly defined class roster, and 3) meet on a regular basis for a minimum of fifteen minutes at least once every 10 days. All other activities are considered to be non-classroom activities.

Non-Classroom Activities

Non-classroom activities are activities that are represented by staff roles and duties. Additional coding with a state subject code of 9900 or higher will be reported from PowerSchool as attached to the roles and duties. Non-classroom activities are discussed later in this document.

Semesters to be Included

The SAR is collected once during a school year. The SAR must include data for the entire school year. If a course is identified as a yearlong course the course is expected to be scheduled for the entire school year. For courses identified as semester long, the SAR is expecting to see data for the courses in all appropriate semesters (semester 1 or semester 2). If the second semester of a course does not have known enrollment, it should reflect the projected enrollment or continued enrollment.

BEP Classes

Physical Education, Art, Music, and Foreign Language classes taught in elementary schools by teachers are expected to be

scheduled.

Chorus

Elementary schools use SSC 5230 with a grade level of “Z”.

Exceptional Children

The lead teacher (s) must be assigned to the appropriate class of students with the appropriate length of the class period to have the roles and duties assigned accordingly.

NOTE: Starting 2014/15, the 0000 code is not a valid course code to use with scheduling students.

Conduct/Citizenship Grades

The SAR does not need this information. If you create a course in order to give these grades, use the SSC 9935 (non-reporting). Please keep in mind that by creating sections for such areas will affect your bell schedule instructional hours you are reporting to the state.

Teacher of Record

A Teacher of Record is defined as an educator (or educators, such as in co-teaching assignments) who has been assigned responsibilities for a student’s learning in a subject/course with aligned performance measures.

NOTE: *In PowerSchool, the Teacher of Record is the “Lead” Teacher.*

Co-Teacher (not to be confused with the PowerSchool role of Co-Teacher)

Co-teaching is a practice and service delivery option for students where specialized instruction is provided while the student has access to the general curriculum in the least restrictive environment (LRE). Co-teaching involves two or more certified teachers with equivalent licensure and employment status who participate equally in instruction, planning, and accountability for a group of students within a shared classroom.

NOTE: *Do not use the co-teacher role in PowerSchool for this teacher. The co-teacher role in PowerSchool is not a DPI created role and is not considered for HQ.*

A Co-Teacher that shares equal teaching responsibilities for a class is assigned as one of the teachers of record (lead teacher) for the class. This staff member is considered for HQ. The “Additional Staff” option and the role of TE2, TE3 or TE3 lead teacher are to be used.

Case Manager

(The description of a Case Manager varies from LEA to LEA and school to school, so it is not limited to the following definition). A teacher who manages or follows the academic or behavioral progress of students in his/her classroom, or manages or follows the progress of students who may be in other teachers’ classrooms, or in different schools. The Case Manager is a central office staff member that LEAs may or may not have at this time. If there is a person at the school level with this title, they are to be coded in roles and duties.

Consultant Teacher

A teacher who is assigned to a class and section, but does not share equal responsibility for delivery of the curriculum in the class to which he/she is assigned. This teacher works with the class on a regular basis and may assist the entire class or subsets of the class with academics and/or behavior.

A Consultant Teacher is assigned in to the class in PowerSchool with the appropriate role indicator and with the appropriate percent of time spent with that class. The role is indicated by the class section on the additional staff screen. This staff member is not to be considered for HQ.

Early Release

The SAR does not need this information. If you need to schedule a student’s time, use the SSC 9931 (Study Hall.) A teacher must be assigned. Since this is not instructional time, it is recommended not to schedule this time in PowerSchool.

Instructional Support

Activities that either do not provide direct instruction, and/or may not occur on a regular basis, and/or may not have a clearly defined class roster are considered to be non-classroom activities. There are several State Subject Course codes that may apply, depending on the exact nature of the activity. In PowerSchool non-classroom activities are assigned from the Staff information screen. Class-room activities as assigned to additional staff for the course section on the Sections screen.

NOTE: *The state code is assigned to a role in the background of the system and not seen by the data entry person.*

Examples:

- Use SSC 9920 (Learning Lab) if the activity is monitored by a teacher while the students utilize available instructional material.
- Use SSC 9923 (Tutoring) if the teacher provides individualized instruction for each student.
- Use SSC 9932 (Activity Period/Homeroom) for such activities as intramural, club meetings, etc.
- Use SSC 9935 (Non-Reporting) for activities such as conduct, citizenship, etc., that need to be listed for grading purposes only.
- Use SSC 9939 (Non-Sched inst support) for instructional support activities that are generally not scheduled on a regular basis or do not have a clearly defined roster and do not meet one of the definitions listed above.

Library Activity/Science

Do not use SSC 9914 (Library Media Coordinator). It is used to identify the librarian or media coordinator. Use 9931(Study Hall) for students that are assisting in the Library on a non-academic basis.

Librarian/Media Coordinator

SSC 9914 (Librarian/Media Coordinator) will be attached to the role in the software background. Select the appropriate role for the Librarian/Media coordinator in Staff Roles to identify the schools' librarian, assistant librarian, media coordinator, or media assistant.

Assistant Librarian/Media Coordinator

The Assistant Librarian/Media Coordinator should not be entered in Staff Roles as a Teacher Assistant to the Librarian/Media Coordinator. The Librarian, under normal duties, is not a teacher, therefore is not entitled to a Teacher Assistant.

Student Library Assistant

The SAR does not require the information on students who serve as library assistants. If you must schedule a student's time, use SSC 9931 (Study Hall).

Mentor Teachers

A Mentor Teacher is assigned to work with another teacher.

Multiple Semester Classes

In order to identify a class properly, the SAR assumes that a course is scheduled for the number of semesters defined in PowerSchool. In order to identify a class properly, it is assumed that the class in which the course is offered has the same section

number in each semester, even if the teacher of the class changes. For example, a course defined as a two semester course is expected to have a section of the class in two semesters and each section should have the same section number.

Pullout Classroom Activity (AG, EC, Chapter One, etc.)

A pullout activity must be scheduled if a clearly defined class roster can be scheduled to the activity and it meets on a regular basis for at least fifteen minutes at least once every ten days

NOTE: A suggested way to schedule student from a class that are pulled out on a regular basis (as defined class) in a standard academic level. Schedule the content teacher with two sections. One section for the period will have the students that are not pulled out and one section with the pullout students. Assign an additional teacher for the pullout section to meet HQ needs for that content and population of students. This schedule setup would not be for Title 1 students.

Pullout Non-classroom Activity (AG, EC, Chapter One, etc.)

If students participate in a pullout activity on an “as needed” basis or if students enter and exit the activity in such a manner that no class roster can be defined, the activity must be entered in Staff Roles and Staff Duties for the staff member assigned to the students. The length of time for the role and or duty is to represent the time in an instructional day.

Speech

Students scheduled for speech therapy should be represented with SSC 9913 (Speech Therapist). Students scheduled for a speech curriculum should be represented with SSC 1014/1015 and a grade level code that indicates whether the curriculum is appropriate for elementary, middle/junior high, or high school.

Student Assistant (Office, other)

SAR does not require this information. If you must schedule a student’s time, use SSC 9931 (Study Hall).

Study Skills

Use SSC 9610 (Special Interest Topics).

Team Teacher

A team teacher is a teacher who shares equal responsibility with another teacher or group of teachers for the curriculum of the class to which they are assigned. A team is coded by having multiple lead teachers assigned to the class.

Note: Additional lead teachers that are equally responsible for the class are entered into the “Additional Staff” area of the course section with the appropriate percent of time spent in that section for a day as TE2, TE3 or TE4. All other roles for additional staff will not be considered for HQ needs of the course section.

Career and Technical Education (CTE)

Most Career and Technical Education courses allow use of cooperative education (co-op) as one way of delivering instruction in the class. Co-op provides on-the-job training linked to a specific CTE course in which the student must be enrolled either simultaneously or during the previous semester of the same academic year. The classroom portion of the co-op should be assigned the regular four-character code for that course using an academic level (fifth character) of “2”. The co-op portion of the course should be assigned the same four-character code, with an academic level of “6”. Students receive credit separately for the two parts of the course.

NOTE: For 2014/15, the co-op course section should be assigned an attribute under Delivery Mode of “cooperative education”

Course Definition

A student’s coursework is expected to be maintained at a student’s current base school. While only current year data is required for students in grades K-8, a complete academic history of 9th through 13th grade coursework (including certain pre-9th grade courses) is required for students in grades 9-13. Current year data includes courses in progress for students in grades 9-13 at their home school and cross enrolled schools. PowerSchool allows for all cross-enrolled students’ current year schedule to be viewed on the Student Course Screen.

North Carolina Virtual Public School

The NCVPS teacher is to be certified in North Carolina and VPS will supply the staff information to the school until VPS has its own instance of PowerSchool.

If a student is taking an NCVPS class, the student should not be incorporated into a "in seat" class of the same subject matter and section. The section for VPS classes must be identified by the course section attributes indicating the section is a VPS class and on-line.

Students may take a combination of "in seat" classes and NCVPS classes with the appropriate section code and attribute.

The individual school that the VPS student is enrolled in is to identify the EC teacher working with the class as required for the student/class needs for IEP and HQ requirements. This teacher is to be scheduled with the class section to meet the requirements. VPS only supplies the subject content teacher.

Personnel Data

- All teachers are to have a UID. If the teacher is not paid by local funds, use the non-payroll staff instruction for acquiring a UID.

Itinerant Teacher

Each school that the teacher performs duties at should show the teacher as a classroom teacher and assigned class accordingly. The teacher should have the same demographic information at all locations. This teacher will show on the staff duplicate exception for the SAR. If correct that the staff member is working in the current school year in multiple schools, no corrective action is needed.

North Carolina School for Science and Mathematics Teachers

If a course is being instructed by NCSSM teacher, either in person or online, the teacher is to be entered using the correct name and UID.

Course Title:

If a secondary school course:

In PowerSchool the state defines the long title. Transcripts created by PowerSchool will show the Long Title as defined by the school and by the state.

If a community college/technical school course:

In PowerSchool the state defines the long title but the school can update as needed. Lead teachers will be populated using a UID. Use the non-payroll staff instructions to create the UID.

If a college/university course:

In PowerSchool the state defines the long title. Transcripts created by PowerSchool show the Long Title as defined by the school and by the state. . Lead teachers will be populated using a UID. Use the non-payroll staff instructions to create the UID.

Vendor Classes

If a class is being instructed by a vendor online, the teacher is to be entered using the DPI defined process. Only approved vendors are to be used unless the course is for credit recovery. Appropriate attributes are also to be attached to the courses and sections. Lead teachers will be populated using a UID. Use the non-payroll staff instructions to create the UID.

Course Attributes

Populate the course attributes as you would the Course Section Attributes mentioned below. Course attributes do not flow down to the sections.

Course Section Attributes (Default values are not stored until you submit)

The SAR must have information to identify course sections that are taught by non-school staff as well as how the instruction is delivered and by what organization or institute. To do this, course section attributes must be populated.

The following attributes must be populated in the course sections for the SAR collection:

- Institution Code – if none, select “Default”
- External Provider – to identify the source of the instructional provider – none is the default
- Third Party Provider – to identify the vendor – none is the default
- Credit Recovery – Select Yes or No
- Delivery Mode – select appropriate attribute
- Course Length – select appropriate attribute
- How Taken – select appropriate attribute

Long-Term Substitute Teachers

- When a long-term (4 consecutive weeks or more) substitute is assigned to a class, that person 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 the requirements for a Highly Qualified teacher.
- When one or more short-term substitutes are used for a class and there is no original teacher of record for the class, then 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 the requirements for a Highly Qualified teacher.
- When one or more short-term substitutes are used for a class and there is an original teacher of record for the class, then the original teacher of record should remain in PowerSchool as the teacher of record for the class.

SAR from PowerSchool

General Information

Schools using PowerSchool to report the SAR data, (school personnel, classroom activities, and non-classroom activities), will need to set up staff with appropriate roles and duties along with students assigned to classes with correct teaching staff.

Duties and Roles

From the Staff screen, bottom left corner, select Staff Duty or Staff Role to enter the appropriate duties and roles for your staff.

You will not enter a role of teacher to a staff member if the teacher is assigned as the lead teacher in the course sections area. That role will be picked up on the SAR with the course section data.

Note: The duration of time is to be entered in **minutes** for an instructional day. The start date (first day of school) and the end date (last day of school) are for the current school year. Percent of time should reflect the percent of the day that the minutes entered represent.

Custom Screens

NCDPI Screens

- Staff Info
- Staff Duty
- Staff Qualify
- Staff Role
- Staff Vehicles

Course Section assignments

Teacher – Section Lead

On the Course Section screen, add the Lead teacher with the % Allocation for that one section. The start and end date is the duration the teacher will be the lead for the current school year. The staff dropdown will provide you with a teacher list to select the correct staff member.

There can only be one lead teacher entered in the Teacher – Section Lead area

Teacher - Section Lead Add

Staff	Role	% Allocation	Start Date	End Date	Actions
<input type="text"/>	Lead Teacher	100	8/26/2013	6/20/2014	<input type="button" value="D"/> <input type="button" value="-"/>

Teachers/Staff – Additional

If you have additional lead teachers you would add them in this area as TE2, TE3 or TE4. Other staff members working with the section such as a teacher assistant or resource teacher would also be assigned under the additional staff option.

NOTE: Only the lead teachers are looked at for HQ.

On the Course Section screen, add the additional staff with the % Allocation for that one section. The start and end date is the duration the staff member will be assigned to this course section for the current school year. The staff dropdown will provide you with a staff member list to select the correct staff member.

Teachers/Staff - Additional Add

Staff	Role	% Allocation	Start Date	End Date	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	8/26/2013	6/20/2014	<input type="button" value="Add"/> <input type="button" value="Remove"/>

Staff Status

The Staff Type in PowerSchool is to be made 'not-assigned' if the teacher has not taught any during this current school year at the reporting school. For example, if the teacher or staff member has served at the school during the current school year, e.g., semester 1, and for semester 2 is no longer at the school, then keep the staff type listed as Teacher or Staff to indicate that for the current school year the teacher or staff member was there at some point.

State Reports

State Reports was developed to pull information from PowerSchool for state reporting in the format required. Before an individual data manager approves the SAR report, they should review the data using the exceptions created after the run process is completed.

The Personnel Summary Report

The Personnel Summary Report is a detailed report for each staff member showing the courses and activities associated with the staff member. This Report is selected through State Reports in PowerSchool once the SAR has been run.

SAR Data Collection

Select area to review: Data View

Data Views

Choose data view: 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. This includes an accounting of their scheduled time (in minutes and as a percentage), and their roles and other staff duties.

Filters

Results

SAR Personnel Summary (626 total records) 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	Grade Range	Total Students	Max Enroll	#Over	Staff Duty	Staff Duty Minutes	Staff Duty % of Time
1	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	24002X0A	Advanced Functions & Modeling	Standard Version	High School	11	S1	5(A-B)		90	100	12-12	1	10				
2	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	24002X0A	Advanced Functions & Modeling	Standard Version	High School	10	S1	1(A-B)		464	100	12-12	1	5				
3	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	24002X0A	Advanced Functions & Modeling	Standard Version	High School	2	S1	2(A-B)		464	100	11-12	30	30				

Data included on the School Personnel Summary Report:

- Personnel assigned to the classes;
- Course information of schedules class sections;
- Section and course length information;
- Students assigned to the scheduled section for the staff member
- Staff roles and duties
- Attributes

SAR Summary

This report is a high level summary of the courses taught at the school including staff names, roles and the student ethnicities

and counts in the section.

The data included on the SAR summary:

- Subject Area Code
- Academic Level
- Course and Section Attributes
- Course Number
- Course Name
- Section Number
- Term
- Period/Day
- Staff Name
- Staff Role
- Grade Range
- Total Students
- Max Enroll
- #Over
- Break down of ethnicities with student numbers
- Break Down of EC and AIG numbers

SAR Detail

This report is a listing of students by course and section with the grade level and documented exceptionalities of the students in the section.

Data included in the SAR Detail:

Staff Name
Course Name
Course Number
Section #
Term
Period/Day
Student UID
Students Name
Student Grade Level
Primary Exceptionality
AIG

Class Overage Report

The data included on the Class Overage Report:

- Courses scheduled with sections
- The teacher (s) scheduled in the section
- The total number of students scheduled to the sections
- The number of enrolled students over the allowed number in the section setup.

This report is not the Official Class Size Report for your school or LEA. This report does not take into consideration the Average Class Size across all similar grade levels within your LEA. This Report can only be used as an indication of the actual class size within your school's classrooms as setup by the school schedule max class size. The course/section will only show on this report if there is an overage. The report will not be processed if there are no overages found.

Class Size Report (new for 2015/16)

The detail report will include a summary of class sections with class size and a calculation of average class size per grade level.

The summary report will have all grade levels with the calculated average class sizes for the school.

The Class Size report will be used for the reporting of the official class size for the State's School Report Card.

Data Collection

To "collect" SAR data, the school must "Run" the SAR as all other compliance reports.

The first step in producing the SAR in PowerSchool is to "run" the report. The SAR is found in the Reports section by selecting State Reports.

Once the run has completed, you have views for:

Exceptions

SAR Summary

SAR Detail

SAR Personnel Summary

SAR Class Overage

Class Size (new for 2015/16)

All staff associated with a course section must be attached to the section.

All periods associated with a course section must have minutes defined in the Bell Schedule.

All defined classes must be scheduled. (Meets on a regular basis for at least fifteen minutes at least once every ten days)

All course sections must be schedules with active course codes defined by the state. (No course code is to be used if DPI has refined it as inactive for the current school year.)

Reporting Issues (data omitted from state reporting due to the following)

- If the ending term date is after student exit dates the result is no student show as enrolled in the section/class.
- If the ending term date is after lead teacher's end date the result is no lead teacher for the section/class.

- If no lead teacher is reported due to date issues, the section/class will not be considered in class size reporting.
- Other items that may have cause data to be omitted from reporting data such as class size or HQ are:
- If a lead teacher is replace during the term of the section/class, the original teacher's start and end date must reflect the accurate time in the section/class. The replacement teacher must also have accurate start and end dates. If both teachers have the same start and end dates, both teacher will be considered as lead teacher and will cause the class size to be smaller.
- Class is omitted if the 'How Taken' attribute is populated with Internet/Virtual School, Community/Technical School, Alternative School and Other were selected and are not considered "typical",
- No qualifying subject courses were included in reported data,
- No qualifying academic level courses (example - no standard level),
- The 3rd Party Provider was indicated (example - Apex Learning).
- The Delivery Mode of Blended needs to be checked for reporting needs for future year reporting. Currently it is not used for class size reporting.

Additional Data Setup Information

Secondary Schools

Community College courses, internet courses, and university courses must be scheduled with the appropriate Lead Teacher, UID and course section attribute.

Personnel

Personnel data must be *updated yearly*.

The SAR process will look at all active staff members for classroom and/or non-classroom activities. If you have any staff members who are no longer working with your school delete the personnel from your database. This cleanup should be done before the school year starts. The SAR exceptions will allow staff to be in your database and to have no activity but be aware; you will have a warning for any personnel that do not have an activity or role assigned.

In PowerSchool, the staff members first, middle and last name will be used for the certified name for all personnel (certified or not). The system will format the name as needed for SAR reporting.

School Schedules

Ensure that all students have been scheduled to classes, including visiting students. A section number can be created by the user or when using the Master Scheduler. All currently enrolled students must have a schedule. See the scheduling documentation found on the Home Base library page at <http://www.nc-sis.org/> for more information on how to schedule using the PowerSchool software package.

Most information on the school schedule is retrieved from Course Section. Some of the information reported is:

- 1) Courses sections scheduled ;
- 2) Teachers that are assigned to classes in the course section area as Lead Teacher or in Additional Staff as TE2,3 or 4, (all lead teachers will be evaluated for HQ status and if the HQ license areas held by one teacher or the combination of the two teachers makes the class HQ then the class will be counted as HQ on the NCLB report);
- 3) Other staff assigned to a class through the “Additional Staff” button at the bottom of the Course Section screen. The percent of the time spent with the individual class is also to be recorded.

NOTE: Staff members listed in the “Other Staff” area is not considered in the HQ evaluation unless they are identified as lead teachers.

Staff Roles and Staff Duties

Staff Duty

Staff duties are non-classroom activities assigned to personnel.

The defined staff duties are:

1. Lunch duty/Lunch - the state expects ALL PERSONNEL to be ASSIGNED A LUNCH
2. Bus Duty
3. Activity Period/Homeroom
4. Learning Lab
5. Nonscheduled instructional support - this can be used to show certified personnel who do not have a pre-defined role or are scheduled regular classes.
6. Planning - The state expects *all classroom teachers* to BE ASSIGNED PLANNING.

7. Study Hall
8. Testing
9. Tutoring

Staff Roles

Staff Roles are used to assign a role to certified personnel who do not have a class schedule. Examples are:

- Principal - Every school must have a principal assigned under Staff roles or you will have a warning on the SAR edit report.
- Assistant Principal - If you do not have an AP under Staff Roles, you will have a warning on the SAR edits.
- Audiologist - if paid from your school.
- Counselor - Regular Funding - This role is used for School counselors
- Librarian/Media Coordinator - This role should be assigned to your Media teacher; you should not assign it to the media assistant.
- Mentor Teacher - A Mentor Teacher is assigned to work with another teacher.
- School Nurse - if paid from your school.
- Speech Language Therapist

Instructions for entering Roles and Duties

Roles

Roles for non-classroom activities (Occupation Codes) like principal, librarian/media coordinator, athletic director, etc. are to be added on the staff roles screen (Start Page>Staff>Select a Staff Member>Staff Roles). The non-classroom activities are associated to staff for duration of a school day. The start Date and End Date are for the current school year. The duration time is to be entered with minutes. The Percent of Time is the percent of an instructional school day.

The following roles are currently listed in Occupation Codes and will be removed soon. Please do not select these roles for occupations. They are classroom activates and are list correctly with the additional staff roles in the course sections area of PowerSchool.

AC-Alternate Classroom Teacher
DARE Officer
(EC) – Co- Teacher
ESL Teacher
Facilitator
Gifted Program Teacher
Learning Assistance Teacher
Resource Teacher
Supervising Adult
Teacher Assistant
Teacher of Hearing Impaired
Teacher of Visually Impaired

Roles for classroom activities are entered for additional staff in the course sections screen (Start Page>School Setup>select the course and section>Edit Section). Once you are in the Edit Section screen, you will see where the Teacher - Section Lead is entered. The - Section Lead will have the role of Lead Teacher. The percent of allocation for the lead teacher should be 100% for that class section.

For additional staff attached to the section, you will select the appropriate role for what is being done by that staff member in the section. Populate the percent allocation for a school day for that section and enter the start and end dates.

DPI identified roles are formatted with two characters and a dash at the beginning of the role description. They are the only roles that DPI will be looking for on the SAR.

Duty

Staff Duties are entered on the Staff Duties screen (Start Page>Staff>Select a Staff Member>Edit Staff Duty Details). Duties (Duty Name) include Planning, Learning Lab, Lunchroom Duty/Lunch, Bus Duty, etc. The duties are assigned for assist the SAR data collection to see what duties are performed by which staff members.

Direct Student Contact is to be checked if the staff member has direct contact with a certain group of students.

The number of students does not need to be populated unless the staff member only works with a certain number of students in the school day. If the staff member works with all students in the school (like the principal), the direct contact and number of students does not need to be populated.

The Duration Percent is the percent of the instructional school day that the duty is performed. The percent is not required information. The Duration Time is to be entered as minutes only for a school day for the current school year. If

the duties are only done on certain days of the week, check the appropriate day box and period.

“Typical” Bell Schedule

The typical bell schedule is for DPI to determine which schedule to use for considering a regular day, when the school has multiple schedules. The “Typical” Bell Schedule is used for the PMR as well as the SAR.

On the School > Bell Schedules page, the schools must click on the name of the bell schedules that are used for a “typical” day and select Yes from the pop-up menu for Use for SAR Calculation of Minutes. Leave Early Release, Late Arrival, and Exam Day, etc. bell schedules set to blank or No. This must be done to prevent the SAR Personnel Summary report from over inflating the number of minutes taught in a day. If a school uses more than one bell schedule in a typical rotation, multiple bell schedules may be set to yes.

CLASS SIZE AND TEACHER DAILY LOAD DETERMINATION

The School Reporting Section is responsible for monitoring local board of education compliance with class size maximums in accordance with G.S. 115C-301 and Session Law 2013-363 (House Bill 112).

I. ADMINISTRATION OF CLASS SIZE

Local boards of education must maintain a LEA- wide class size average no higher than the class size ratio of teachers to students of the following:

Kindergarten	1 to 21
Grade 1	1 to 21
Grade 2	1 to 21
Grade 3	1 to 21

In grades 4-12, local school administrative units shall have the maximum flexibility to use allotted teacher positions to maximize student achievement.

NOTE: Charter schools are exempt from class size requirements.

B. During the first two months of school, no class size maximum requirements exist as long as the LEA-wide class size

average maximums for each grade or grade span are not exceeded.

At the end of the second school month and for the remainder of the school year, the size of an individual class may exceed the LEA-wide ratio by three students so long as the LEA-wide average class size maximums are not exceeded. Therefore, individual class size ratio maximums are:

Kindergarten	1 to 24
Grade 1	1 to 24
Grade 2	1 to 24
Grade 3	1 to 24

When a class contains a combination of grades for more than one grade span, the maximum class size will be determined by the grade span classification which constitutes the majority in the class.

When teachers are assigned students in a team-teaching setting, each teacher in the team is considered to be responsible for an equal number of students in the class, regardless of how frequently the teacher actually teaches.

- C. If individual class size exceeds 24 in grades K, 1, 2, or 3-at the end of the second school month and for the remainder of the school year, the local board has the responsibility to follow the steps set forth in G.S. 115C-301(g) and G.S.115C-47(10).
- D. Study halls and homerooms are not counted when calculating average LEA-wide class size average. (All other classes are to be included in the calculation of LEA-wide class size averages.)
- E. Class size maximums apply to all K-3 teachers, including those which are state, federally, and locally funded.

II. INITIAL REPORTING OF CLASS SIZE

Under the provisions of G.S. 115C-301(f) and G.S. 115C-47(10):

- A. Class size exceptions will be identified and reported via the School Activity Report (SAR). A school's SAR will be reported following the reporting of the school's Principal's Monthly Report for the second school month.
- B. All class size overages not allowed by a waiver must be corrected by the LEA. Corrections may be made by reorganization of classes, by correcting inaccurate data at the school level, or by requesting a class size waiver from the State Board of Education (see III. below). Corrected class size data must be reported. Class size overages in schools without waivers will be called to the attention of the State Board of Education.

III WAIVERS DUE TO EXCESS CLASS SIZE

Under the provisions of G.S. 115C-301(g), 115C-47(10):

- A. The Department of Public Instruction is authorized to review and respond to, on the State Board's behalf, an LEA's request for a waiver of class size requirements for individual classes.
- B. Local boards of education are responsible for assuring the class size requirements set forth in G.S. 115C-301 are met. Any teacher who believes the requirements of G.S. 115C-301 have not been met shall make a report to the principal and superintendent. The superintendent shall immediately determine whether the requirements have in fact not been met. If the superintendent determines the requirements have not been met, he or she shall make a report to the next local board of education meeting. The local board of education shall take action to meet the requirements of the statute.

If the local board cannot organizationally correct the exception and if any of the conditions set out below are met, it shall immediately apply to the State Board of Education for a waiver from the standards set above. The Individual Class Size Waiver form can be located on the Financial and Business Services' Web page www.ncpublicschools.org/fbs/accounting/forms/ .

Within 45 days of receipt of the request, the State Board, within funds available, may grant waivers for the excess class size in kindergarten through third grade:

1. If the exception resulted from:
 - a. Exceptional circumstances, emergencies, or acts of God (such as closing of classrooms due to fire, or other natural disaster; students transferring to a school during the middle of the school year, impractical combination classes),
 - b. Significant growth in the school and grade population (caused by large military installation or business personnel transfers);
 - c. Organizational problems caused by remote geographical location, or
 - d. Classes organized for a solitary curricular area, and
2. If no individual class size waiver has been request for that specific school and grade during the previous school year, and
3. The waiver is for no more than two students above the established class size maximums, and
4. If the local board cannot organizationally correct the exception.

C. Penalty for Noncompliance. – If the State Board of Education determines that a local superintendent has willfully failed to comply with the requirements of this section, no State funds shall be allocated to pay the superintendent's salary for the period of time the superintendent is in noncompliance.

D. Requests for individual class size exception waivers require the completion of a form supplied by the School Reporting Section in the Division of School Business. The current form can be found at: www.ncpublicschools.org/fbs/accounting/forms/ .

1. Requests for individual class size waivers for classes out of compliance at the end of the 2nd school month must be received by the Department of Public Instruction prior to November 30 of the current school year.
2. Requests for individual class size waivers for classes out of compliance after the end of the 2nd school month must be

submitted as they occur.

3. Waivers, when granted for a specific incidence, may remain in effect for the remainder of the current school year.

E. Upon notification from the State Board that the reported exception does not qualify for a waiver, the local board, within 30 days of receipt of the State Board notification, shall take action necessary to correct the exception. A report of the action taken to alleviate the exception shall be sent to the School Reporting Section within 30 days of receipt of State Board notification that the exception did not qualify for a waiver.

Business rules for determining Grades K-8 Class Size for School Report Card

1. Assign grade category to class:

- a. Sum total students by each individual grade (PK, KI, 01, 02, etc.) in the class
- b. Sum total students by grade range categories for the class. The grade range categories are PK, KI-02, 03, 04-09, and 10-12.
- c. Compare total students by grade to determine which grade has the maximum number of students associated with it. Begin with the highest grade and work to the lowest.
- d. Compare total students by grade ranges to determine which grade range has the maximum number of students associated with it. Begin with range 10-12 and work down to range PK.
- e. Determine the class size grade category:
 - 1) If grade range category PK represents the maximum number of students, then the grade category for the class is PK.
 - 2) If grade range category KI-02 represents the maximum number of students, then:
 - a) If the individual grade with the maximum number of students is PK, then the class size grade category is KI.
 - b) If the individual grade with the maximum number of students is 03 – 12, then the class size grade category is 02.
 - c) Otherwise, the class size grade category is the individual grade with the maximum number of students (KI, 01 or 02).
 - 3) If grade range category 03 represents the maximum number of students, then the class size grade category is 03.
 - 4) If grade range category 04-09 represents the maximum number of students, then:

- a) If the individual grade with the maximum number of students is PK, KI, 01, 02 or 03, then the class size grade category is 04.
 - b) If the individual grade with the maximum number of students is 10, 11 or 12, then the class size grade category is 09.
 - c) Otherwise, the class size grade category is the individual grade with the maximum number of students (04, 05, 06, 07, 08 or 09).
- 5) If grade range category 10-12 represents the maximum number of students, then:
- a) If the individual grade with the maximum number of students is PK, 01, 02, 03, 04, 05, 06, 07, 08, or 09, then the class size grade category is 10.
 - b) Otherwise, the class size grade category is the individual grade with the maximum number of students (10, 11 or 12).
2. Determine if type of class is “typical”:
- a. For grade categories KI-03:
 - 1) Class has corresponding academic level 2 (Standard Course of Study) and subject code 0000 (Self-Contained).
 - 2) If no classes satisfying criteria 1) exist for a grade category, then look for classes with corresponding academic level 2 and subject code 1010 (Language Arts) for that grade category.
 - 3) If no classes satisfying criteria 1) or 2) exist for a grade category, then look for classes with corresponding academic level 2 and subject code 0109 (Language Arts/PE/Health), 0120 (Language Arts/Math), 0123 (Language Arts/Math/Science), 0124 (Language Arts/Math/Social Studies), 0129 (Language Arts/Math/PE/Health), 0130 (Language Arts/Science) or 0140 (Language Arts/Social Studies) for that grade category.
 - b. For grade categories 04-12:
 - 1) Class has corresponding academic level 2 (Standard Course of Study) and subject code 0000 (Self-Contained).
OR
 - 2) Class has corresponding academic level 2 and subject code 0120 (Language Arts/Math), 0123 (Language Arts/Math/Science), 0124 (Language Arts/Math/Social Studies), 0130 (Language Arts/Science), 0140 (Language Arts/Social Studies), 0230 (Math/Science), 0420 (Social Studies/Math), 0423 (Social Studies/Math/Science), 0430 (Social Studies/Science).
OR

- 3) Class has corresponding academic level 2 and subject code(s) is in range 1000-4999 (these are the English, Math, Science and Social Studies disciplines), excluding subject code 1038 (English as a Second Language) and any university/community college subjects within that range.
- c. If a class satisfies criteria mentioned above and is additionally deemed an exceptional children class, it is not included with “typical” classes.
3. Select “typical” classes with corresponding grade categories K1-08 and occurring in semesters that fall during date range October 25th and November 10th of the school year.
4. By school, sum number of teachers and number of students associated with selected classes for each grade category.
5. Class size (student/teacher ratio) by grade category = number of students divided by number of teachers and rounded to nearest whole number.

EXCEPTION REPORTING

The exceptions are identified as:

Fatal

At least one of the exceptions associated with the data had an error level of E (Fatal Error). DPI cannot accept that line of data as valid. The data must be corrected and the NCWISE Coordinator must request the school's SAR be Disapproved in order to be re-submitted with correct data.

Warning

A warning notifies the school that there may be problems in their data. It should be researched at the school, but the resolution does not affect the data already submitted. DPI has accepted the school's data. The overall status of that line of data is a warning and no response to DPI is required. If the school feels that the data is important, the data must be made complete. The NCWISE Coordinator must request the school's SAR be Disapproved in order to be re-submitted with correct data.

Information Only

The information only exceptions point out data that may or may not be correct but should be looked at for verification. If left unchanged, the data will be reported as seen in the SAR.

EXCEPTION CORRECTION

Two offices at DPI are available to assist in error correction. The Home Base Service Center helps with questions or concerns with software issues; School Financial Reporting helps with policies and procedures issues. Questions about Class Size should be addressed to School Financial Reporting at 919.807.3727.

Following are a few comments that may help in the exception correction process.

- SAR data is used with payroll data as of the third pay period submitted to the DPI in order to determine whether all personnel expected have been received.
- The SAR assumes that the name it receives is the same as the name in payroll and certification data. If the name does not match, the problem may be an incorrect social security number or it could be that the name is wrong in either PowerSchool, payroll at the LEA, or certification at DPI. If there is a name problem, resubmitting SAR data will only correct the SAR name. A name problem in payroll data should be corrected at the LEA level. A name problem in certification data should be corrected with DPI Certification.
- Class size reporting depends on the proper identification of classes. This process requires the use of valid course codes.
- If all semesters of an activity were not assigned the same section number the SAR assumes that a course is scheduled for the number of semesters defined for the course in the Course Directory. It also assumes that the class in which the course is offered has the same section number in each semester, even if the teacher of the class changes.

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: 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. 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.	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	VPS courses are taught by VPS Teacher. Class sections are identified by the attribute.	Update teacher information to correct lead teacher.
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 staff 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 is suspect. Valid Course Grade Level Codes with associated Student Grades are: P = PK-P3; X = 09-13 Y = 06-08 Z = K1-5 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.

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).	Edit class section teacher as appropriate.
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.
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. All personnel with staff roles.	Correct the role or assign classes to the staff member.
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. <i>This exception will be active once the software has been updated to validate active course codes.</i>
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 VPS would have provider attributes and the possible institution code.	Verify that this information is valid and populate as required for accurate reporting of the individual course section.
SAR-34	School	FATAL	Teachers listed are either missing their UID or their SSN	All Lead teachers must have a UID in the StatePrID. DPI will only be looking for SSNs for the following staff members: 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	Populate the missing UID and/or SSN.

SAR-35	School	WARN	Staff without email address	<p>Special Populations Coordinator and Career Development Coordinator. 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> <p>PowerSchool will be used for the authoritative source for staff email addresses DPI will only be looking for emails for all active staff members.</p>	If the staff email is missing, populate the work email for the staff member on the Staff Information screen
SAR-36	School	Fatal	Teacher End Dates	<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> <p>Teacher end date on the section information page is not the end date of the section's term,</p> <p>NOTE: Added 2015/16</p>	Teacher's end data on the section screen should be edited to be the last date of the term

SAR-37	School	Warning	The Average Class Size is out of range	The class average is fewer than 10 or more than 50	Verify that the sections and teachers are scheduled accurately for reporting accurate size of class per student/teacher ratio
SAR-38	School	Fatal	Course High/Low grade range has been altered	Course High/Low grade range has been altered and is inconsistent with Class Size reporting needs	Check with the DPI to verify what the high/low grade range should be for the course and updated as required. Re-Run the SAR after the correction to report accurate SAR data.