ClassMate

Introduction to:
Collection 5 Summer Submission

*   C5 Child Acct EOY

PIMS Child Acct EOY Submission

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- Templates Required for PIMS Child Acct EOY Submission

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PIMS Child Acct EOY

Templates Required for PIMS Child Acct EOY Submission

The following templates are required for the Child Accounting Submission:
- Student (not required to upload to PIMS but we recommend exporting to ensure accuracy of required templates)
- School Enrollment (required for Student submission)
- School Calendar
- Student Calendar Fact

Note: Documentation for the Child Acct EOY Submission can be found on our site at: http://www.classmate.net/classmate-user-state-documentation/ under Pennsylvania State Documentation < PIMS School Schedules & Times Summaries.

Submission Dates can be found on the Elementary Secondary Collection Calendar on the PIMS Website: http://www.education.pa.gov/Teachers%20-%20Administrators/PIMS/Pages/default.aspx#.V1GwrFUrJD8

PIMS Child Acct EOY

Module Requirements for Child Acct EOY

The following modules should be assigned to Child Accounting personnel:

- Base Data Information
    - Sending School Management
        - Used for entering District & School Abbreviations as needed, entering/updating School Schedules, & entering/updating Time Changes (if applicable)
- District Billing Module
    - Instructional Time Summary
        - Used for inserting/updating Time Summaries
- Curriculum Management
    - Instructional Course Offerings
        - Used for entering an 8 Letter Course Abbreviation. This task may already be completed but should be reviewed
- Student Enrollment
    - Student Scheduling
        - Used to correct student district/school information
        - Used to assign specific school schedules to specific students on the District Updates tab – field school schedule
- PIMS Management
    - PIMS Export Management
- State Reporting
    - State Reporting Validations
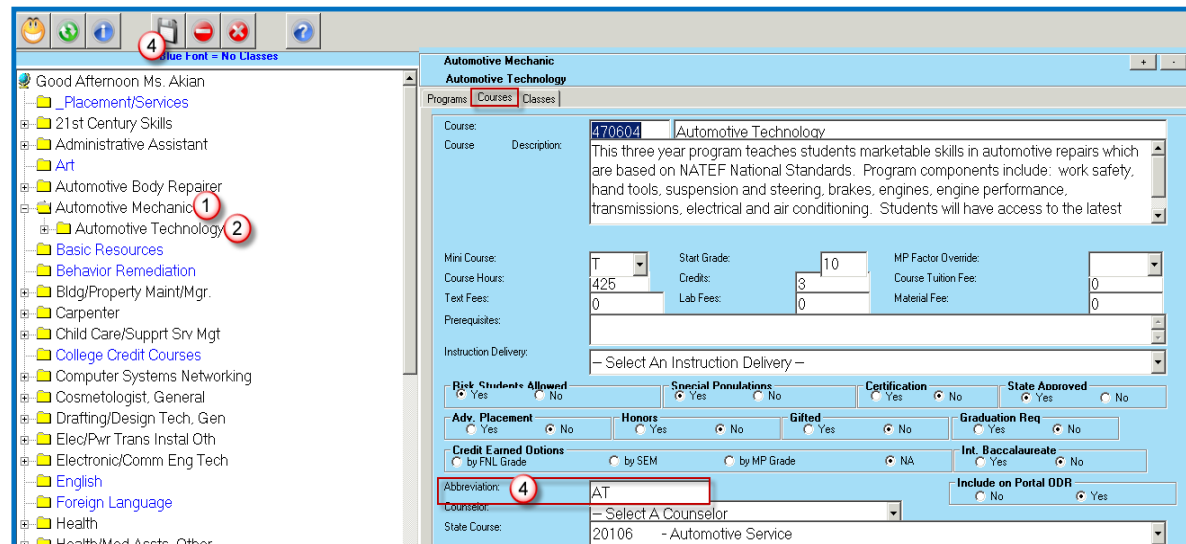
Course Name Abbreviation Setup

Double Click **Modules** **>** Double click **Curriculum Management** > Click **Instructional Course Offerings**

All Courses must have an abbreviation in ClassMate. Follow these steps to enter any that are missing:

1. Select a **Program Name** and click the **+** to left to expand and display the Courses
2. Select a **Course Name** by single clicking the name
3. Enter up to an 8 letter abbreviation in the **Abbreviation Box**
4. Click the **SAVE** icon
5. Repeat for all Courses

Sending District & School Abbreviation Setup

Double Click **Modules** > Double click **Base Data Information** > Click **Sending School Management**

All Districts and Schools need to have abbreviations in the system. Follow these steps for any District that does not:

1. Select a **District Name**.
2. Enter a 3-4 letter abbreviation in the **Abbreviation Box**
3. Click the **SAVE** icon

Sending District & School Abbreviation Setup, continued

All Schools must also have an abbreviation in the system. Follow these steps to add any that are missing:

1. Click the **+** to left of the District Name to expand and display the sending schools
2. Select a **School Name** by single clicking
3. Enter a 3-4 letter abbreviation in the **Abbreviation Box**
4. Click the **SAVE** icon

- ## School Schedules Introduction

The purpose of School Schedules is so that the days attending and start/end times of a particular sending school can be recorded in ClassMate.

School Schedules can be saved and used for multiple school years. During rollover, the School Schedules automatically are updated to the new school year so that they can be used again with little or no updates.

However, if a site wishes to delete (purge) their School Schedules and start fresh each year they may do so, this is typically done at the beginning of the School Year.

There are two modules where a site can purge their School Schedules:

- The first module is located under **Modules > Base Data Information > Sending School Management**
- The second module is located under **Modules > District Billing > Instructional Time Summaries > Procedures tab**
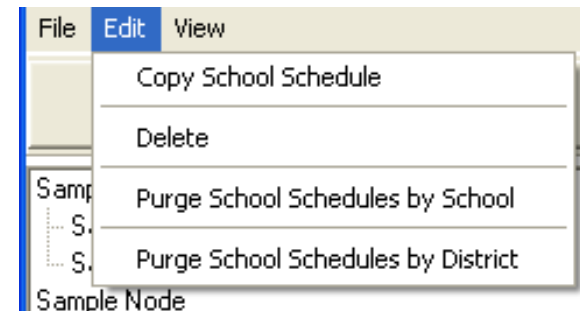
- **School Schedules:** Purging Previous Schedules

Double Click **Modules** > Double click **Base Data Information** > Click **Sending School Management**

To purge schedules by District or by School via the Sending School Management module:

• Click on a District Name

• Click the Edit menu and choose:

    • Purge School Schedules by District. This will purge all School Schedules for all schools under the District you selected.

    - OR -

    • Purge School Schedules by School. This will then require you to click on a School under the District you have chosen, and it will then delete the School Schedules for that school only.
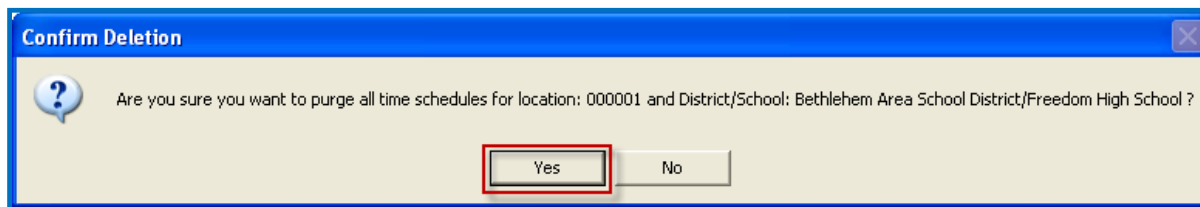
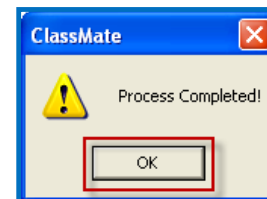- **School Schedules Introduction:** Purging Previous Schedules, continued

If purging by District click Yes to "Are you sure you want to purge all time (school) schedules for location: and District?"

Confirm Deletion

? Are you sure you want to purge all time schedules for location: 000001 and District: Bethlehem Area School District ?

[Yes]   [No]
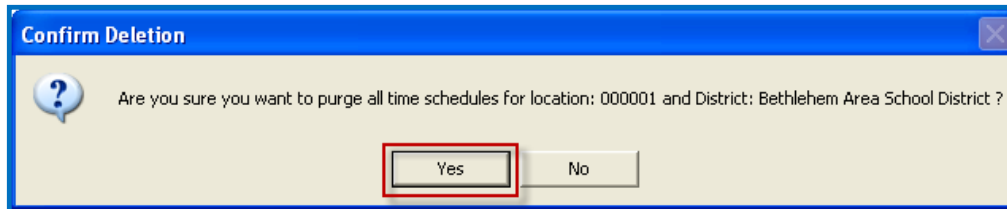
If purging by School click Yes to "Are you sure you want to purge all time (school) schedules for location: and District/School?"

Confirm Deletion

? Are you sure you want to purge all time schedules for location: 000001 and District/School: Bethlehem Area School District/Freedom High School ?

[Yes]   [No]

- Click OK when the Process Completed! Window appears

ClassMate
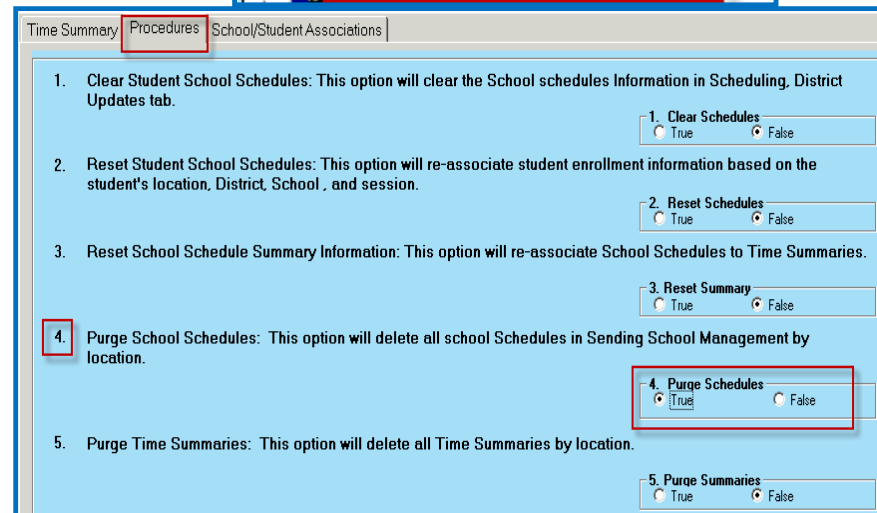
⚠ Process Completed!

[OK]

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- ## School Schedules Introduction: Purging Previous Schedules, continued

Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**

You may also purge previous schedules via the Instructional Time Summary module:

1. Open the Instructional Time Summary module.

2. Click the Procedures tab.

3. Go to Step 4: Purge School Schedules: This option will delete all School Schedules by Location.

4. To perform the process click True.

5. You will be prompted with the message, "Are you sure you want to purge School Schedules for location?"

6. If you are sure, click Yes.

If your site has multiple locations, you will need to repeat for each location by first selecting the location and then repeating these steps.

Selecting any of the **PURGE** selections will display a pop up window asking your to confirm before it processes the **PURGE** the **RESETS** automatically process
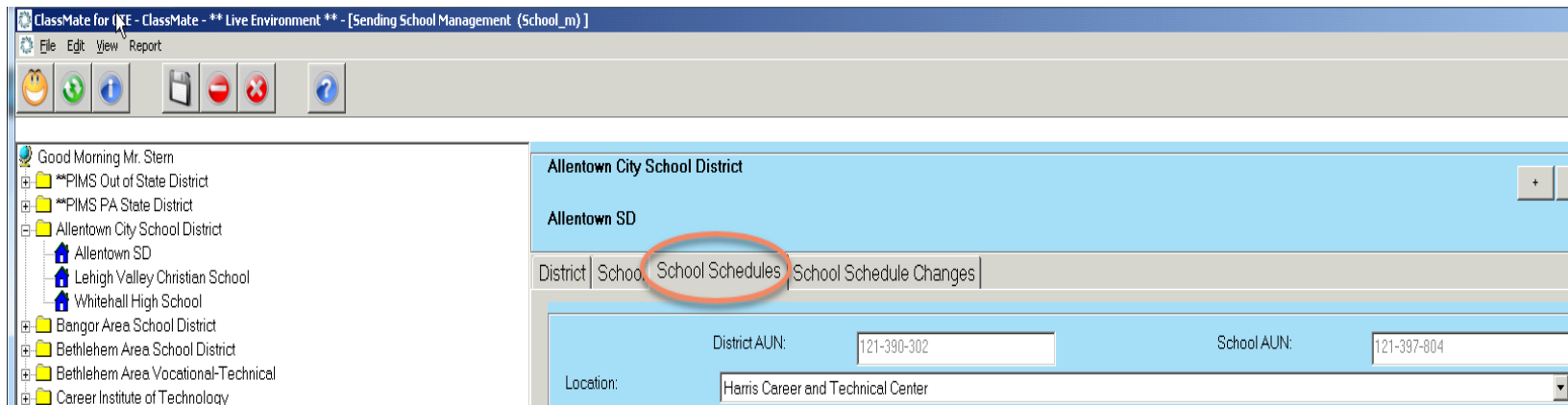
Creating New School Schedules

Double Click **Modules** > Double click **Base Data Information** > Click **Sending School Management**

You are now ready to create a new School Schedule.
Start with the following steps:

1. Select a **District Name** and click the **+** to left to expand and display the sending schools.
2. Select a **School Name** by single clicking.
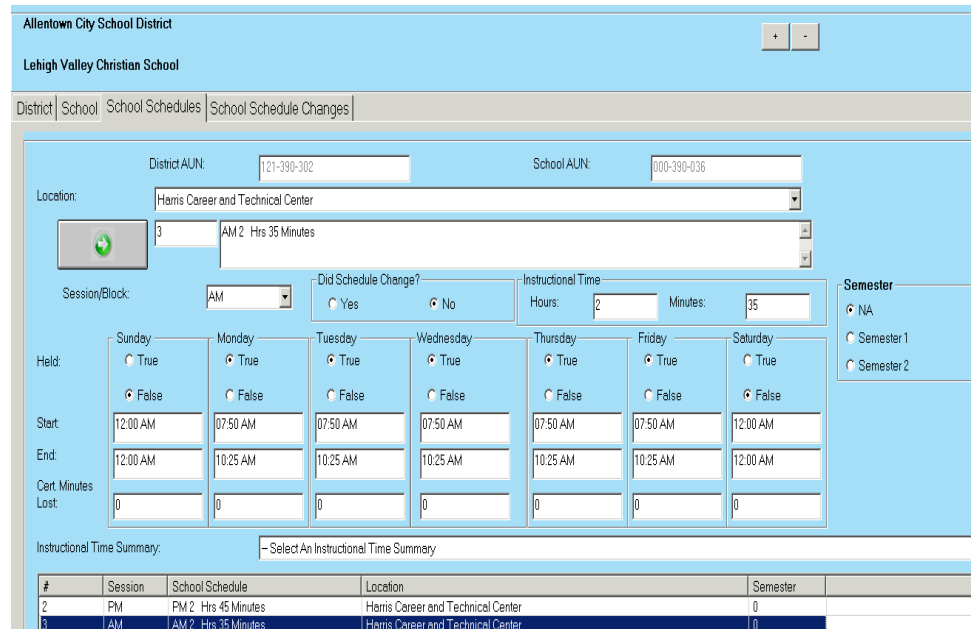3. Click the **School Schedules Tab.**

Creating New School Schedules, continued

On the School Schedules tab for the desired school, perform the following steps to create a new schedule:

1. Click the **Green** Arrow button to create the next consecutive **Schedule ID.**
2. Enter the **Schedule Name.**
3. Select the **Schedule Block** from the drop down menu (example: AM)
4. Enter the Instructional Time for the Schedule in the next two steps:
5. Enter the Instructional Hours in the Hours box (example: 2).
6. Enter the Instructional Minutes in the Minutes box (example: 54).
7. Click the radio button for **"True"** to identify the schedule days.
8. Enter the **Start Time - Optional.**
9. Enter the **End Time Optional.**
10. Click **"Save".**
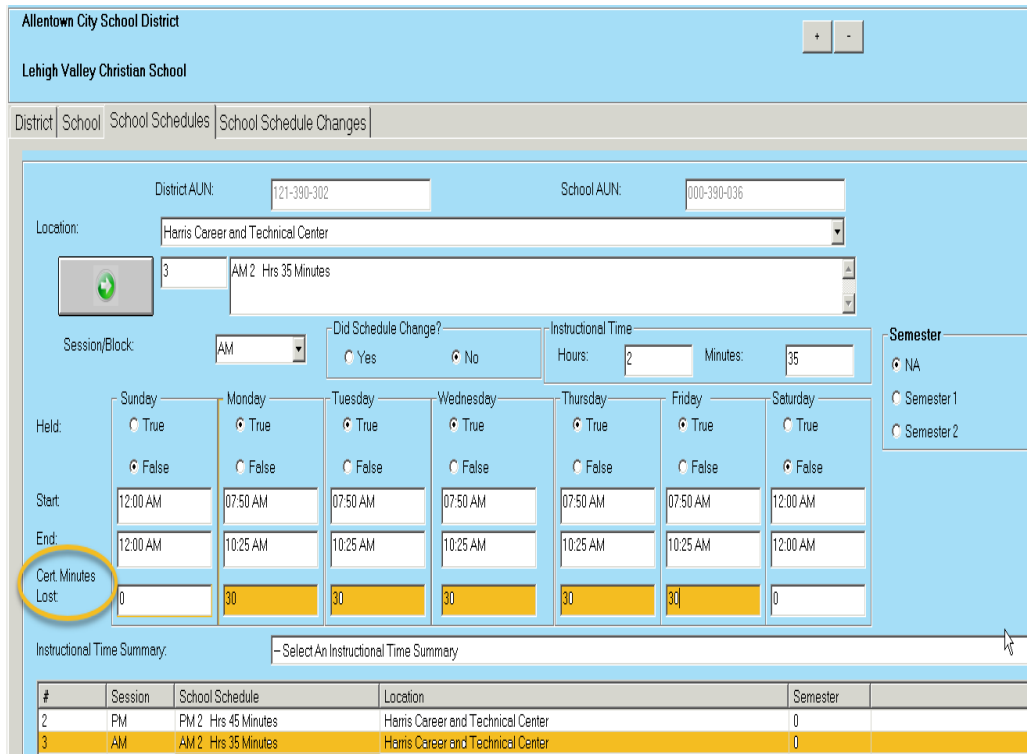
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Certification Minutes Lost (for clients utilizing CM Certification Reporting Add-On Option ONLY)

The Hours and minutes associated with this module are related to state reporting. If the sending school instructional time is 2 hr and 15 minutes, then the Cert Hours Lost would be 30 minutes if the period instructions hours are 2 hr and 45 min.

Double click **My Modules**>Double Click **Base Data Information**> Click **Sending School Management**

- Select a **School**

- Click **School Schedules** Tab

- For Each present or created

- Enter **Lost Minute** Deductions

- Click **"Save"**

Note: It is critical that lost minutes be formatted

i.e. if instructional time is 1 hr 50 min. & Standard period is 2 hr and 20 min then **LOSS** is 30 minutes**.**

Copying School Schedules

If there are multiple schools that share the same schedule, create the schedule once and then copy it to the other schools.

You can copy multiple schedules to multiple schools in various districts in one set of steps.

- Example: If you have many schools where the AM session starts at 08:00AM and ends at 10:45AM you can create one School Schedule in one school & copy it to the other schools.
- First, click on the Edit menu and choose "Copy School Schedule" and then follow these steps:
  1. Select the schedule(s) you wish to copy on the left side list of schedules.
  2. Select the schools you wish to copy to on the right side list of schools.
  3. Click the Yellow folder icon ("Assign")
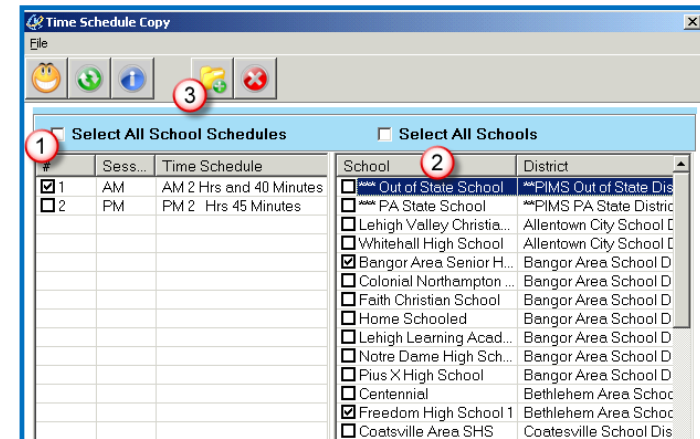
If there are schools that start and end at different times, you will need to create School Schedules for each school, for each session that is different.

Example: If a school has a specific bus that arrives 15 minutes later than other busses for the AM session then you would need to create an additional AM Session School Schedule for that school.

Updating Existing School Schedules

If your site chooses to update the existing School Schedules from last year you will need to perform the following:

1. Run the District Billing > Sending Schools Time Schedules report
2. Identify which School Schedules have changes or are no longer valid
3. Go to each District/School.
4. Click on the existing School Schedule.
5. Enter the Instructional Hours in the Hours box.
6. Enter the Instructional Minutes in the Minutes box.
7. Verify the Start Time – if the start time for this school year was changed from what it was last school year make the necessary adjustments.
8. Enter the End Time – if the end time for this school year was changed from what it was last school year make the necessary adjustments
9. Click Save
10. Repeat process for all other Existing School Schedules that you are re-using.
11. Lastly, re-run Sending School Time Schedules report and verify all of your recent changes are complete

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Updating Existing School Schedules
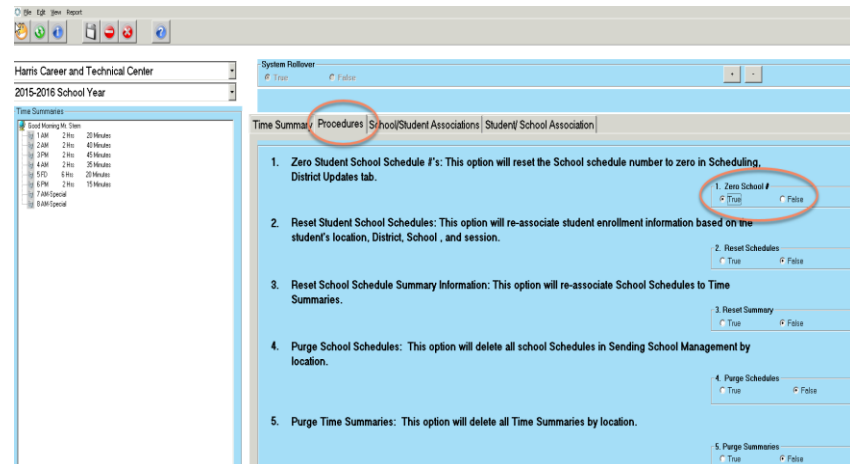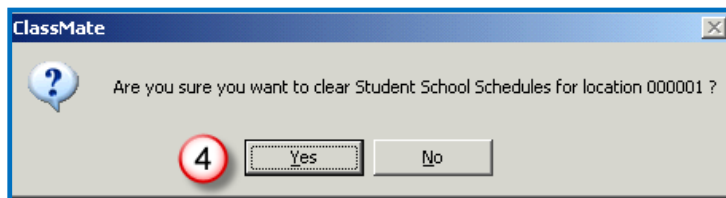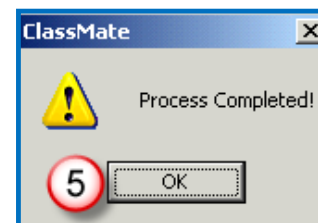
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Clearing Student School Schedules

It may be necessary at the start of a new year to clear all Student School Schedules. This process will blank out any School Schedule assignment for a student in the Student Scheduling District Updates tab.
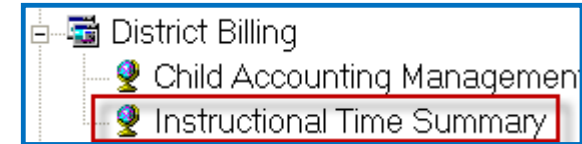
Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**

1. Click Procedures tab.
2. Select Location (if applicable)
3. Click True in Section <u>One</u>, "Zero Student School Schedules #'s."
4. Click Yes when prompted, "Are you sure…"
5. There is no need to save. The Process Complete message will appear when finished, click OK.
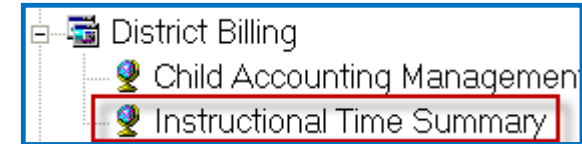

Multi-Location schools will need to repeat these steps for each location.
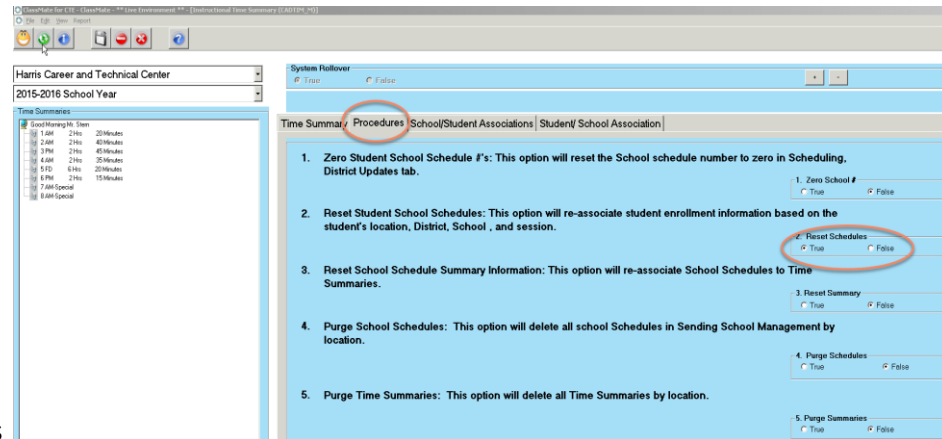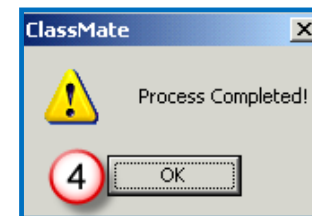
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Resetting Student School Schedules

After clearing all student school schedule assignments, it is likely your next step will be to reset all student's schedule assignments to the newly created schedules. These steps perform that process.

Double Click **Modules >** Double click **District Billing** > Click **Instructional Time Summary**

1. Click Procedures tab.
2. Select Location (if applicable)
3. Click True in Section <u>Two</u>, "Reset Student School Schedules."
4. There is no need to save. The Process Complete message will appear when finished, click OK.

Note: Multi-Location schools will need to repeat these steps for each location.

All student's School Schedule assignments in Student Scheduling, District Updates will now be reset to the default (numerically first) AM or PM School Schedule for the school in which the student is enrolled.

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Default Student School Schedules

After the Reset Student School Schedule process is complete, each student is assigned a School Schedule by default, based on their District, School, and Session as reflected in Student Scheduling, District Updates tab.

The default schedule for AM or PM is the first (numerically lowest) schedule of AM or PM on the School Schedules tab of a particular school in the Base Data / Sending School Management module.

Example: Jane Doe is enrolled in School ABC of District XYZ in the AM session. School ABC may have 3 different AM and 3 different PM session School Schedules, but Jane will be reset to whichever AM session School Schedule has the lowest numeric ID # in School ABC's Sending School Management / School Schedules tab.

If you have any students that do NOT adhere to the default school schedule, you will need to manually update the schedule for those students individually.

Example: John Smith is also enrolled in School ABC of District XYZ in the AM session, but John rides a bus which has a route that makes it arrive 15 minutes later every day than the normal start time. John will have to be manually assigned a School Schedule that has been created for School ABC that has a later start time.

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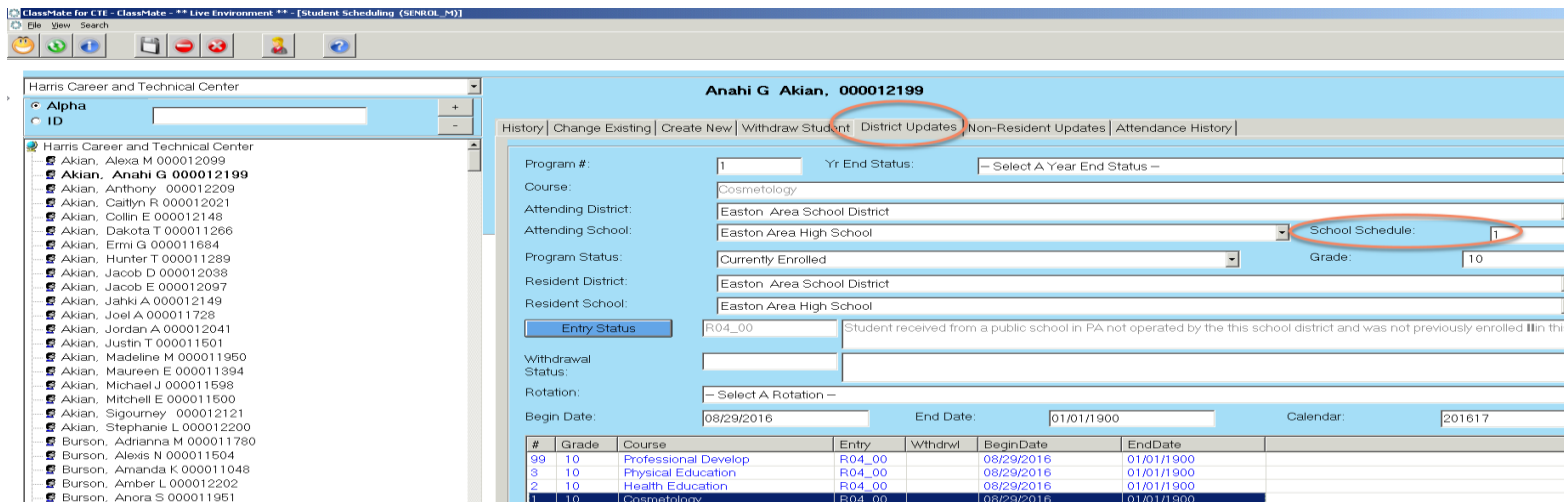## Assigning Student School Schedules

To assign a particular School Schedule to a particular student:

Double Click **Modules** > Double click **Student Enrollment** > Click **Student Scheduling**

1. Click the Student's Name on the left-hand list.

2. Click the District Updates Tab.

3. Select the Course.

4. Enter the School Schedule Number you want to assign. School Schedule #'s are assigned based on the attending District/school and Student's AM/PM /FD period session. Use the number of the School Schedule from the School Schedules tab of the Sending School Management for the student's attending district /school, not the Time Summary #.Click Save
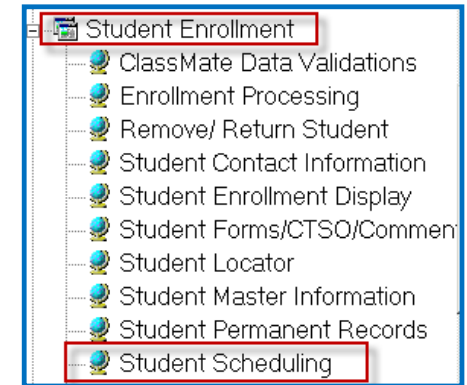
Repeat as necessary for any additional courses or students.

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State Reporting Validations
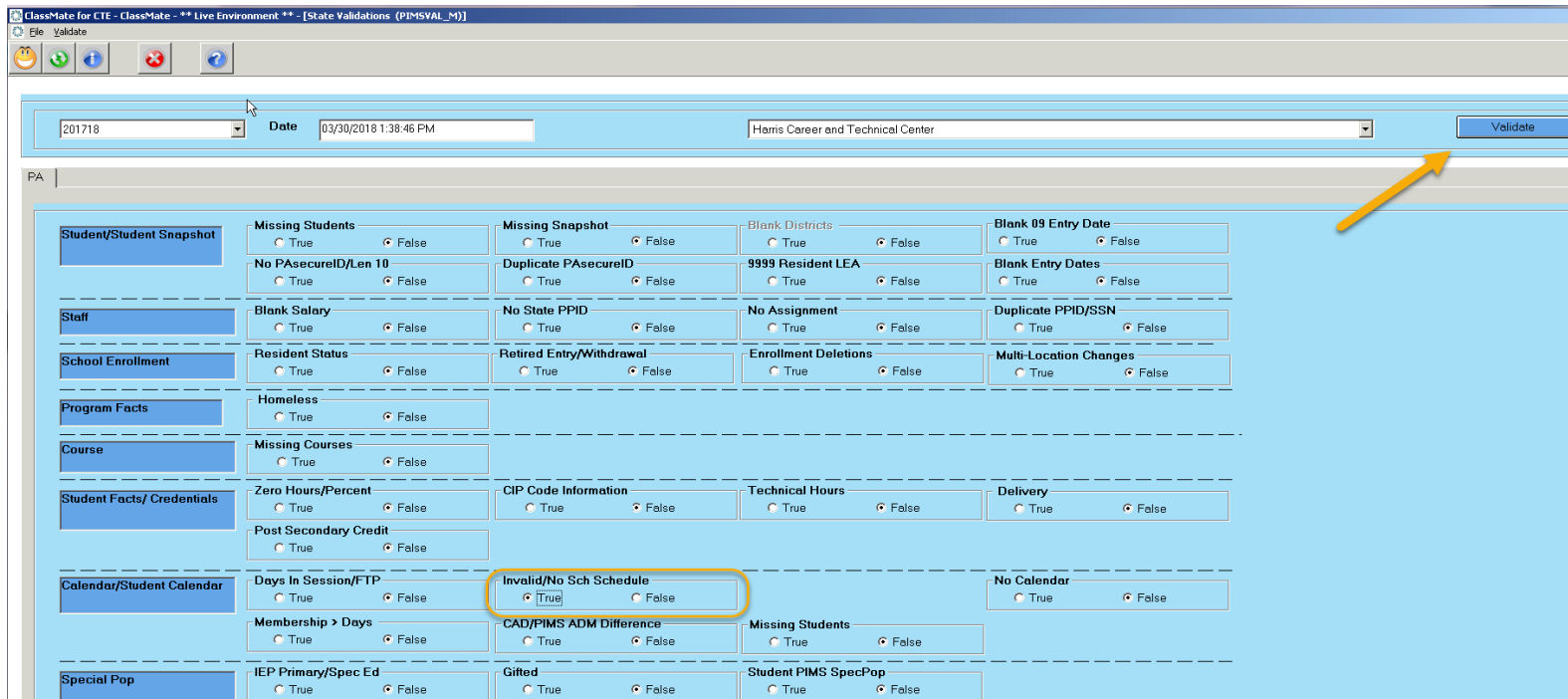
Calendar/Student Calendar > select *True Invalid/No Sch Schedule > Validate

* No School Schedule:
> Student has a 0 in their enrollment School Schedule field. Using the Student Assignment Criteria previously defined, identify the proper School Schedule #, enter it in the field, and save.

* Invalid School Schedule:
> Student has a # entered in the school schedule field; however, that # does not exist in Sending School Management- School Schedules tab for the student assignment criteria.

Inserting & Updating Time Summaries Introduction

At this time we recommend and stress the importance to insert time summaries early and start validating the school schedule links and student links; however, please wait to update time summary information until after the school year closes.

While working on this process please do not finalize the time summary information like rotation pattern, graduation dates, etc until after the school year closes – the reason is that if you update all of your time summary data, then you have an unexpected school closing or snow day that adjusts the School Calendars you will have to purge the time summary data and re-insert. All of your updates will be lost.

Please be sure the following steps have been completed:
*   All School Schedules have been entered and validated
*   The School Calendar has been verified for the following:
        > all Snow Days/other days have been entered
        > all Make up Days have been properly flagged
        > all Holidays have been entered
        > all Teacher In-service Days have been entered
*   all Act 80 days have been entered
*   all Strike Days have been entered
•   all days Added have been properly flagged

***** VERY IMPORTANT: the student last day is correctly displaying the # of days in session in School Calendar Management *****
        > i.e if the Last Student Day is June 12, 20xx and the LEA is in session 180 days. When clicking on June 12, 201xx the day in session should display 180.
        > If the # displayed is not 180, do not proceed until the calendar has been corrected and the days in session displays 180.

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Inserting & Updating Time Summaries

Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**

- Click **"Edit"** located on the toolbar along the top of the screen
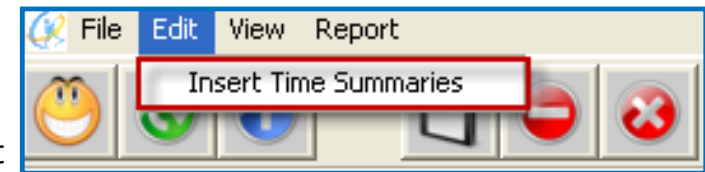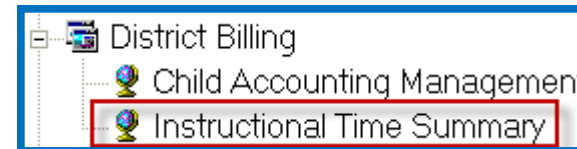- Click **"Insert Time Summaries"**

This will insert 1 time summary for each **unique** school schedule that you entered in the Sending School Management module.

Example: If you had 1 AM school schedule that you copied to all schools, you will only have 1 AM time summary.

** If you have a "**special**" schedule (for ex: only attending M-W-F) for a specific session (AM / PM) and it is duplicated in another Sending School please be aware this **"Special"** schedule will only show as ONE Time Schedule in Instructional Time Summaries (for ex: AM-Special / PM-Special)
This "**special**" schedule will then need to be assigned to ALL applicable Sending School Schedules in Sending School Management.

- Select Time Summary to Review & Update

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Inserting & Updating Time Summaries, continued

Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**

Select a Time Summary to Review & Update

Review the following Yellow Highlighted Fields:

- Number Scheduled Days

- Act 80 Days

- Act 80 Group – this is a 12 digit field. The 12 digits are the 12 digits users entered on the PDE portal when they submitted the Act 80 days for approval.

- Other Days (Snow)

- Makeup Days

- Days Added

- Strike
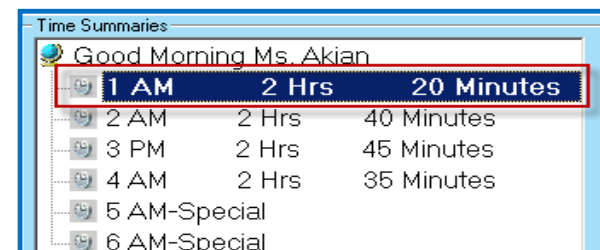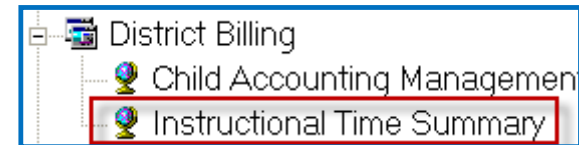
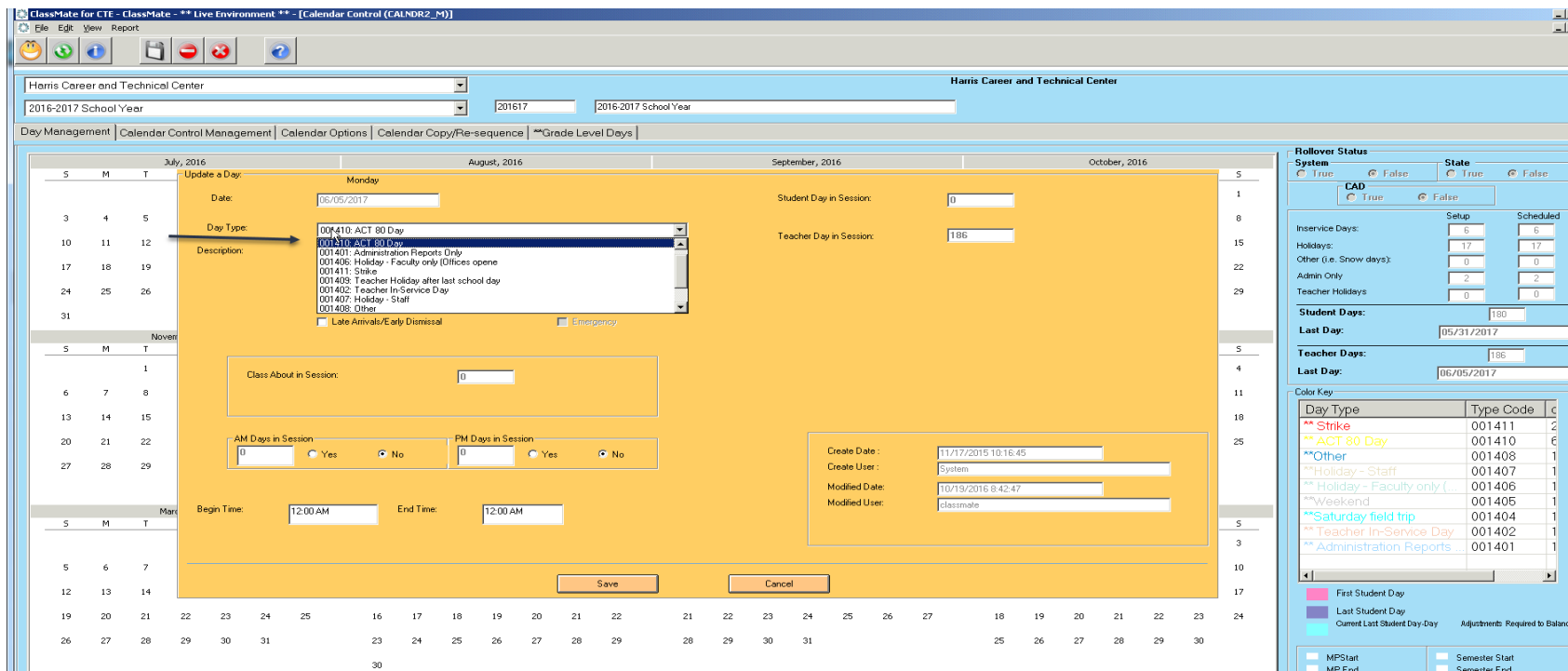| # Scheduled Days: | 179 | Act 80 Days: | 0 | Act 80 Group: | | Other Days: | 9 |
| Makeup Days: | 5 | Days Added: | 5 | Strike: | 0 | Session: | AM |

*Note: Should you find an error in ANY of these fields (except the Act 80 group which must be edited in this module), we strongly recommend that you do not edit the totals here, but fix the calendar in the School Calendar Management module.

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Inserting & Updating Time Summaries, continued

Sample Scenario:

While reviewing the Act 80 field it is determined that you have 1 ACT 80 day that is not appearing in your Time Summary. You must edit the date of your ACT 80 day in **School Calendar Management**. The day has either been classified incorrectly (In-service day) or has not been identified at all. After changing the day, click the **Orange** Save button.
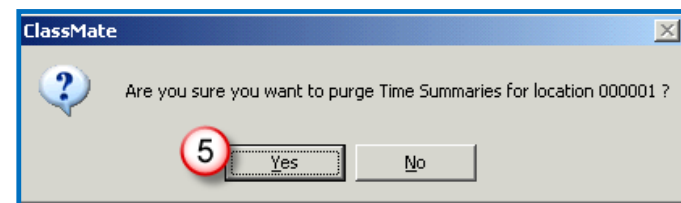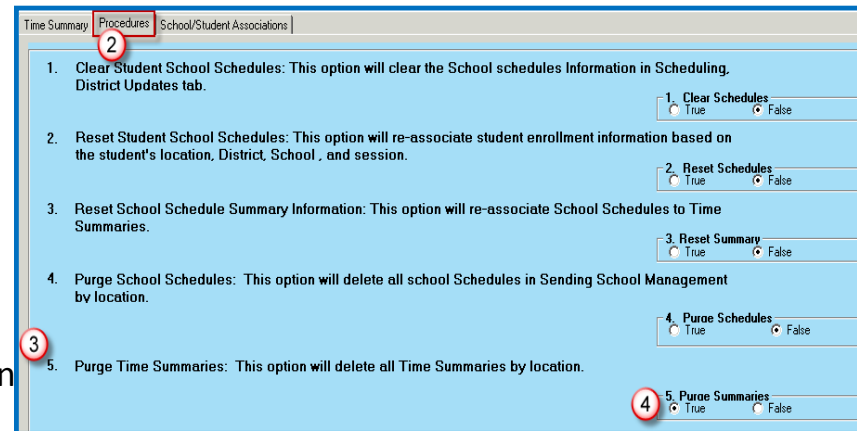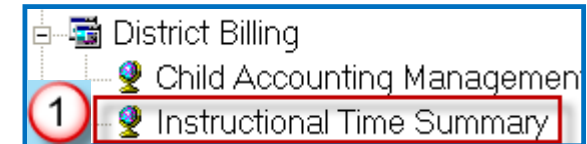
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Purge Time Summaries

Purge Time Summaries is for when you have a School Calendar Change. If you have to perform the purge Time Summaries process all of your updates to the Time Summaries will be lost.

If a site has to purge Time Summaries the following steps will need to be performed:

1) Go to Modules > District Billing > Instructional Time Summary.
2) Click the Procedures Tab.
3) Go to Step 5: Purge Time Summaries: This option will delete all Time Summaries by Location.
4) Click True.
5) You will be prompted by a message saying: "Are you sure you want to Purge Time Summaries for Location" - if you are sure click Yes.
6) Repeat these steps if your site has multiple locations that have also incurred a School Calendar change that has affected Time Summaries.

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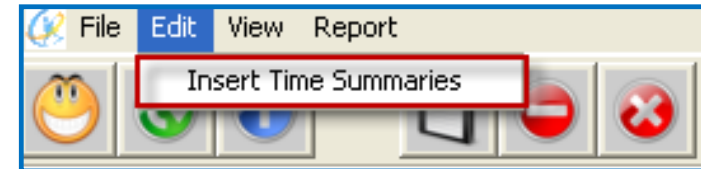## Inserting & Updating Time Summaries, continued

After all the corrections have been made in the Calendar Control Module, you should then return to:

Modules > District Billing > Instructional Time Summary Module

You **Must** Re-Insert the Time Summaries after making updates to the calendar:

1. Click **"Edit"** located on the toolbar along the top of the screen
2. Click **"Insert Time Summaries"**

The changes made to the calendar days are now reflected:

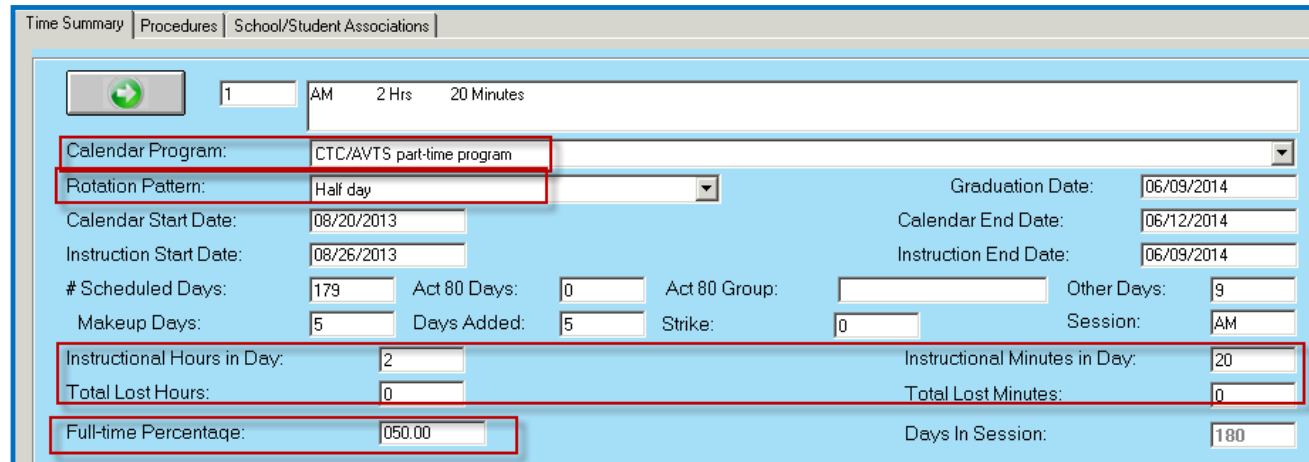| # Scheduled Days: | 180 | Act 80 Days: | 1 | Act 80 Group: | 149385923679 | Other Days: | 9 |
| Makeup Days: | 5 | Days Added: | 5 | Strike: | 0 | Session: | AM |

PIMS Child Acct EOY

Inserting & Updating Time Summaries, continued

Review the Data for the following Fields:

- Verify: Calendar Program (verify a non-reimbursable entry exists for any non-state approved time summaries)
- Verify: Rotation Pattern – (**Required** only for Half Day & Semester, leave blank otherwise)
- Verify: Instructional Hours in Day
- Verify: Instructional Minutes in Day
- Manually Enter: Total Lost Hours
- Manually Enter: Total Lost Minutes
- Verify: Full-Time Percentage
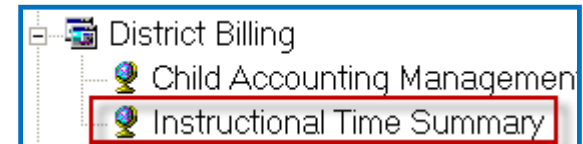- Click **"Save"**

Repeat the procedures for each time schedule
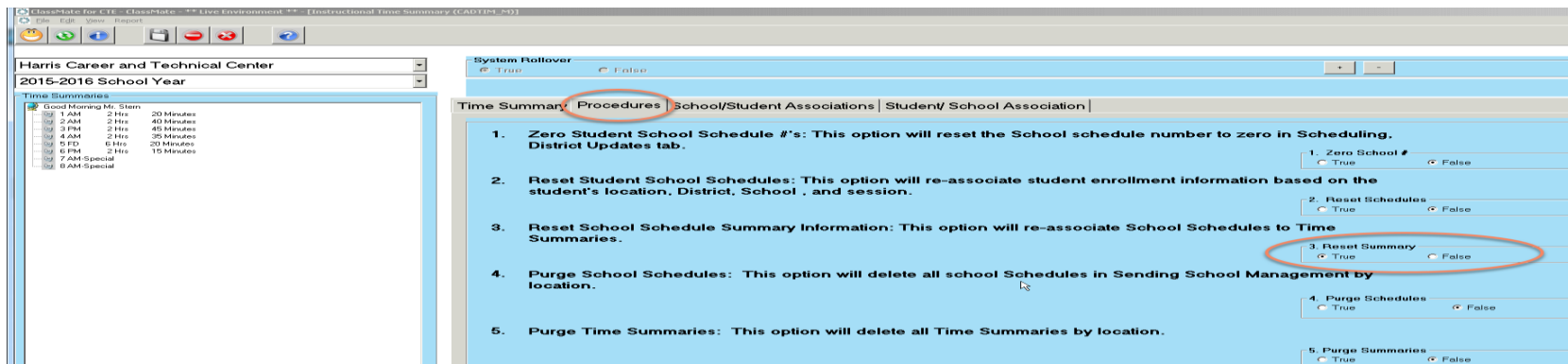
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Resetting School Schedule Summaries

Perform this step **AFTER** Time Summaries have been inserted/updated.

Double Click **Modules** > Double click **District Billing Information** > Click **Instructional Time Summary**
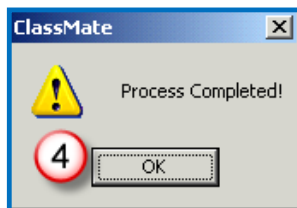
1. Click Procedures tab.
2. Select Location (if applicable)
3. Click True for #3, "Reset School Schedule Summary Information."
4. Click OK when "Process Complete" appears.

If your school has multiple locations, repeat as necessary for each location.

PIMS Child Acct EOY

Verify School Schedules to Time Summaries Links

Go to Modules > District Billing > Instructional Time Summary

Click on Reports located on the top tool bar.

Select the Time Summary Assignment report.

Note: If the Report does not appear on top tool bar the report can be accessed by closing the module, going to Reports District Billing > Time Summary Assignment report. If you do not see this report please contact your System Administrator and request that the report be assigned to you.

Review this report and verify that the Sending Schools are showing linked to the correct School Schedule & Time Summary.

If there are any Sending Schools not showing the correct linkage between School Schedule & Time Summary you will need to correct the linkage in the Sending School Management Module.
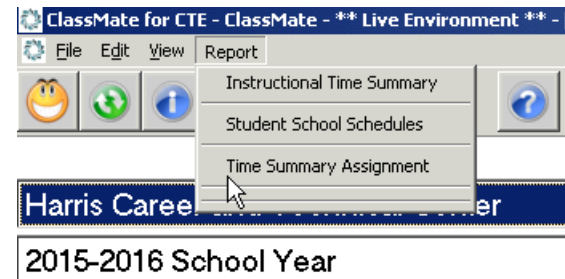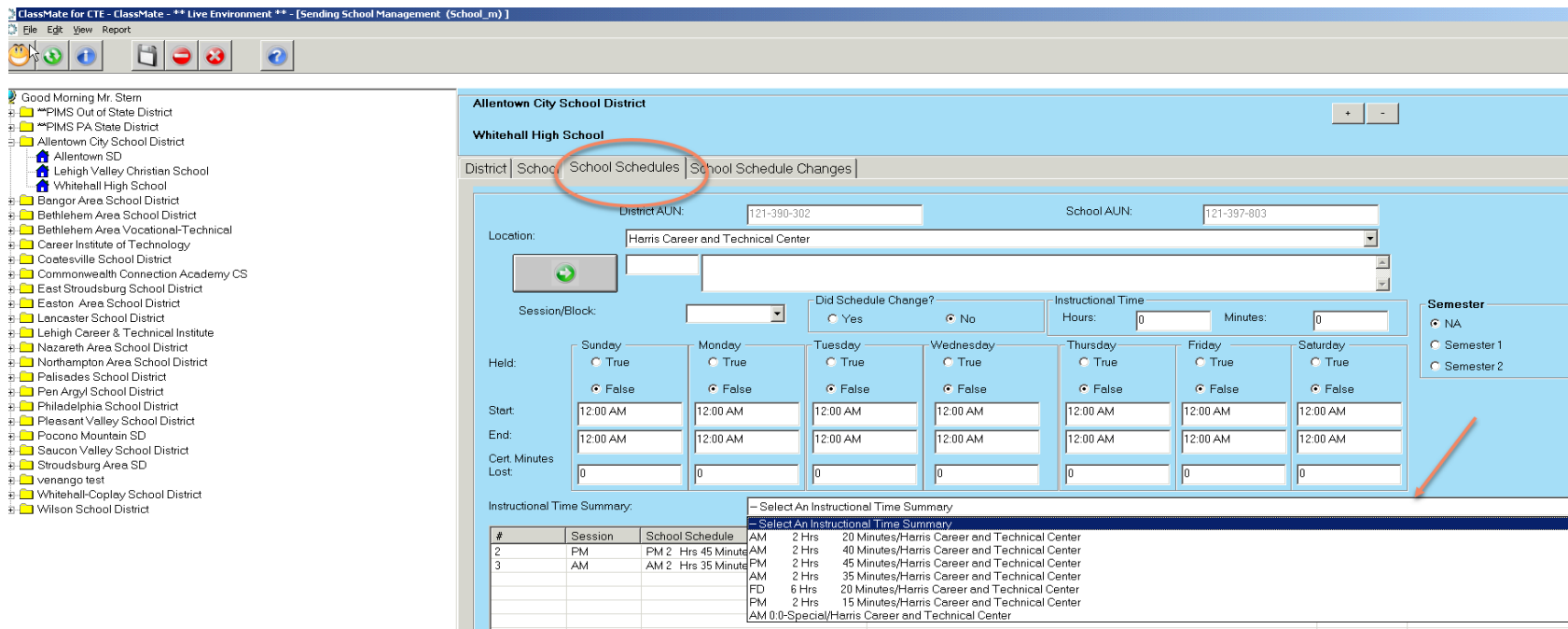
PIMS Child Acct EOY

Correcting School Schedules to Time Summaries Links

Double Click **Modules** > Double click **Base Data** > Click **Sending School Management**

1. Click a District.
2. Click a School.
3. Click the School Schedules tab.
4. Click on a Schedule to select.
5. Check that the dropdown shows the correct linkage to the Instructional Time Summary.
6. If it does not, click the dropdown and select the appropriate Instructional Time Summary.
7. Click Save

PIMS Child Acct EOY

School/Student Associations

You can also view which school is assigned to which Time Summary and which students are assigned to the School Schedule by performing the following:
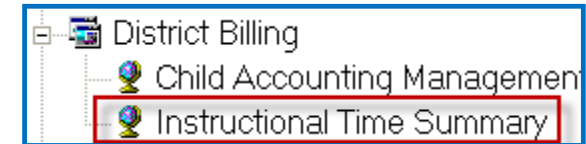
Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**

1) Click on a Time Summary
2) Click the School/Student Associations tab
3) Click on a School Schedule

PIMS Child Acct EOY

Double Click **Modules** > Double click **District Billing** > Click **Instructional Time Summary**
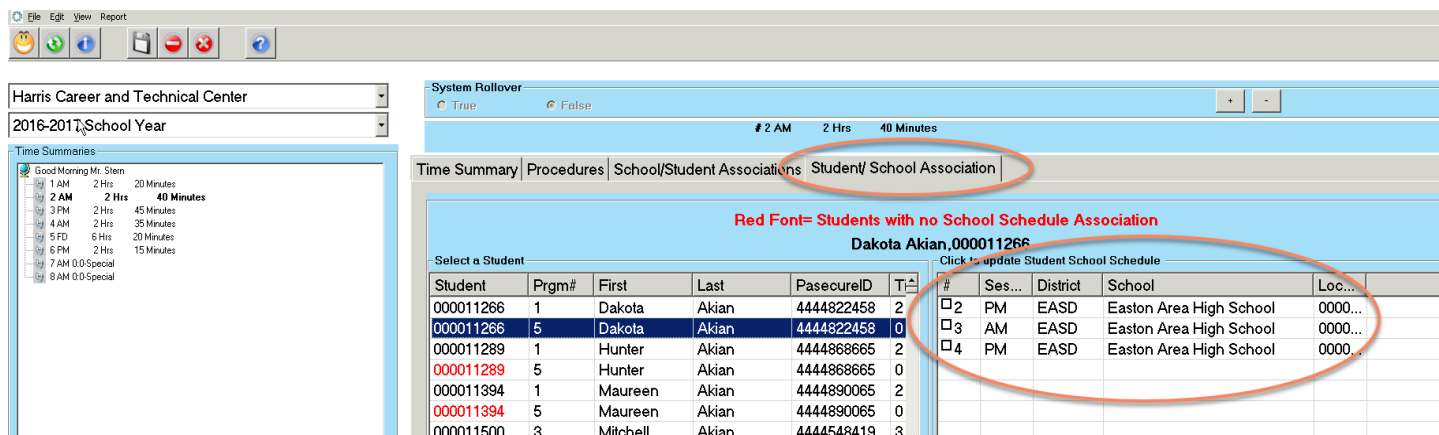
New tab in Instructional Time Summary. Student/School Association:

On this tab the user can perform the following:

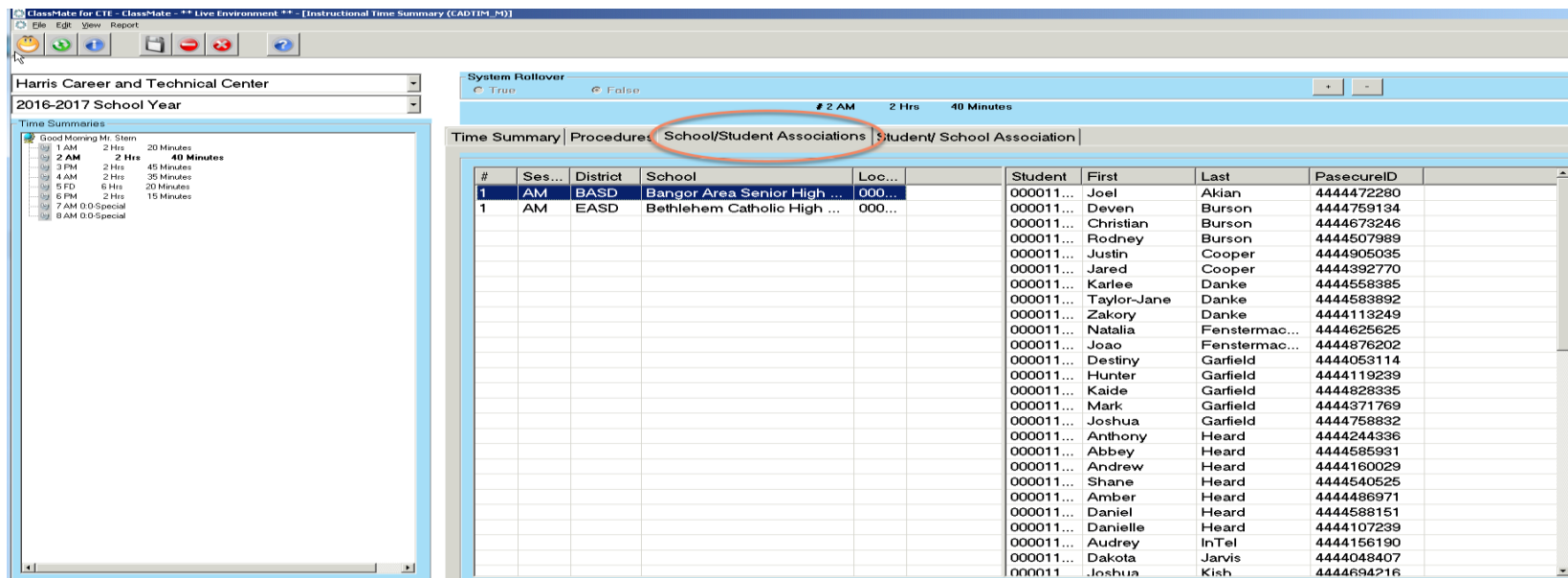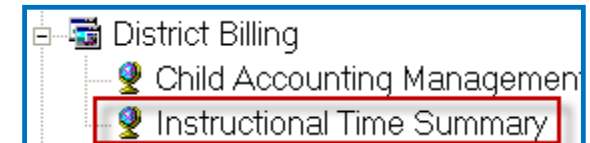District Billing
- Child Accounting Management
- **Instructional Time Summary**

• Identify which students do not have a school schedule association assigned in Student Scheduling – District Updates tab. These students display in red.

• Clicking on the student row in red will display an available school schedule to the right in the School Schedule Window. Clicking the School Schedule will automatically associate the Student to the selected school schedule # in Student Scheduling – District Updates tab.

** The primary function for this tab is for PIMS administrators who are left to process PIMS Child Accounting information after the Student Services staff has left for the summer and they do not know how or where to update student schedules.

PIMS Child Acct EOY

Recommended Reports

School Calendar Information > School Calendar List

Review scheduled days for accuracy

District Billing > Instructional Time Summary

Review Time Summary data

District Billing > Student School Schedules

Review students linked to school schedule number

**Note: Students are not linked to the Time Summary Number.

   If there are students who are not linked to the proper School Schedule Number those students will need to be manually adjusted in Student Scheduling / District Updates tab.

District Billing > Time Summary Assignment

Review Schools associated with Time Summary

Must export PIMS templates before generating the following reports:

PIMS Management > Alpha Student Calendar Fact

PIMS Management > PIMS Student Calendar Fact Summary

PIMS Management > PIMS School Calendar

PIMS Management > Current Yr – School Calendar Report

PIMS Child Acct EOY

Child Accounting Reports

Reports > District Billing > Enrollment Membership Summary

On this report review/validate district data, look for discrepancies of membership that exceed your total days in session and Blank Districts

Reports > PIMS Management > PIMS ADM Summary

***Note: Before running these reports you MUST export the PIMS School Calendar & PIMS Student Calendar Fact templates**

Compare the PIMS ADM Summary report to the Enrollment Membership Summary report.

Look at all data including membership entries and totals. Make sure no students are missing. Make sure that the data matches.

Clients should review student discrepancies individually, checking schedule begin dates and end dates, checking to see if the Student is linked correctly for PIMS, etc.

Discrepancies that cannot be corrected should be sent to the Help Desk for assistance.

PIMS Child Acct EOY

Time Change * Special Circumstance

During the School Year

Once the School schedules have been created, inserted, updated and saved ClassMate does allow for changes to the schedule while the school year is in session.

Getting Started

Double Click **Modules** > Double click **Base Data Information** >
    Click **Sending School Management**

PIMS Child Acct EOY

Time Change * Special Circumstance, continued
Time Change Example

School A's AM students have been attending the CTC for the first 90 days of school at 8:00AM until 10:45 AM which is 2 hours & 45 minutes of instructional time.

Now School A has informed the CTC that these same AM students will now be coming at 8:30AM until 10:45AM which is 2 hours & 15 minutes instructional time for the last 90 days of the school year.

This example would require a Schedule Change be created. The process is:

1. Mark the schedule that will be changed to "Schedule Change?: Yes" on the School Schedules tab.
2. Create the original schedule in the School Schedule Changes tab.
3. Create the new schedule with the changed times in the Time Changes tab.
4. Make additional changes, as needed, if the schedule changes again – if the schedule changes back to the original, for example.

At the end of the process, you may have multiple time changes for one schedule but they must add up to the full number of school days in the year.

PIMS Child Acct EOY

Time Change* Special Circumstance, continued

Creating a Time Change: Part One – Mark Schedule as Changed on School Schedules tab:

1. Select the school.
2. Select the School Schedule that requires the Time Change.
3. Click "Yes" for Did Schedule Change?
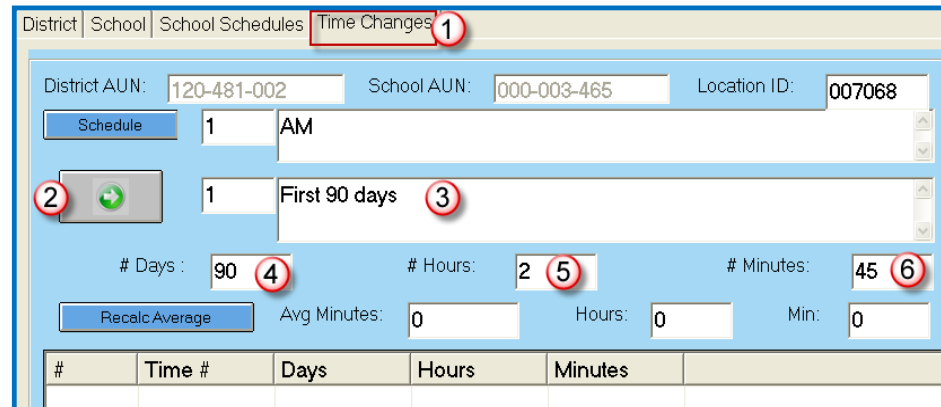4. Click Save.

PIMS Child Acct EOY

Time Change* Special Circumstance, continued.

Time Change Part Two: Creating the Original Schedule in Time Changes Tab.

1. Click the Time Changes Tab.
2. Click the Green Next Number button.
3. Enter a Time Change Name for the original School Schedule time – This will be the initial schedule.
   - ClassMate best practice is to use the number of days. Example: "First 90 days."
4. Enter the # of Days in the # of Days box (example: 90)
5. Enter the # of Hours in the # of Hours box (example: 2)
6. Enter the # of Minutes in the # of Minutes box (example: 45)
7. Click Save.
8. When all time changes have been entered , user must click the recalculate Average button so that all the time change hours and minutes can be averaged in to 1 average Hours and minutes time summary.

Note: Remember that this info is for the *original* schedule.   In the next step we will enter the data for the changed schedule.
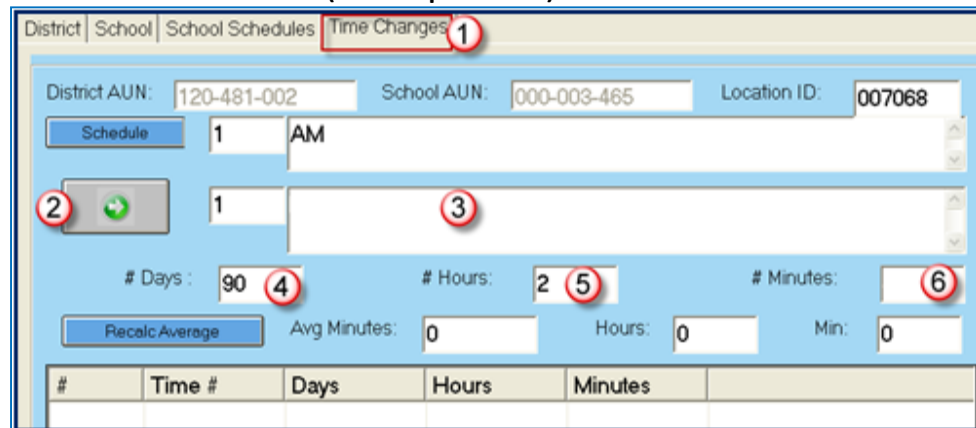
Time Change* Special Circumstance, continued.

Time Change Part Three: Creating the New Schedule in Time Changes Tab.

1. Click the Time Changes Tab if not already selected.
2. Click the Green Next Number button.
3. Enter a Time Change Name for the new School Schedule time – this will be the new schedule.
   - ClassMate best practice is to use the number of days. Example: "Next 90 days."
4. Enter the new # of Days in the # of Days box (example: 90)
5. Enter the new # of Hours in the # of Hours box (example: 2)
6. Enter the new # of Minutes in the # of Minutes box (example: 30)
7. Click Save.

Note: If during the school year the schedule changes yet again, such as back to the original time, a 3rd Time Changes schedule must be created with that information.

PIMS Child Acct EOY

PIMS Export Management

Getting Started:
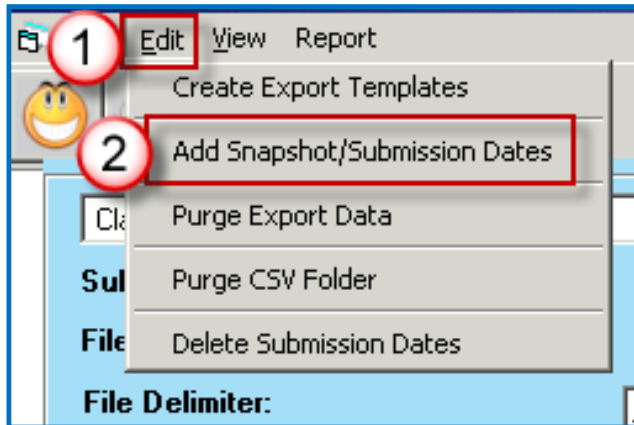
Double click > Modules > Double Click PIMS Management > Click PIMS Export Management

- When the module opens:

  1. Click Edit

  2. Click Add Snapshot/Submission Dates

  3. Click the Snapshot Date drop down arrow & select the submission date – 06/30/YYYY

     - **Note:** We know on the PDE PIMS Calendar PDE lists the Snapshot Date as N/A but a Snapshot Date is required for Export so utilize the end of the school year which is 06/30/YYYY.

  4. Check the boxes for the templates that are due for the PIMS Child Acct EOY Submission which are: Student, School Enrollment, School Calendar, and Student Calendar Fact.

  5. Click the Save icon

  6. Click the Close icon to return to the initial PIMS Export Management screen
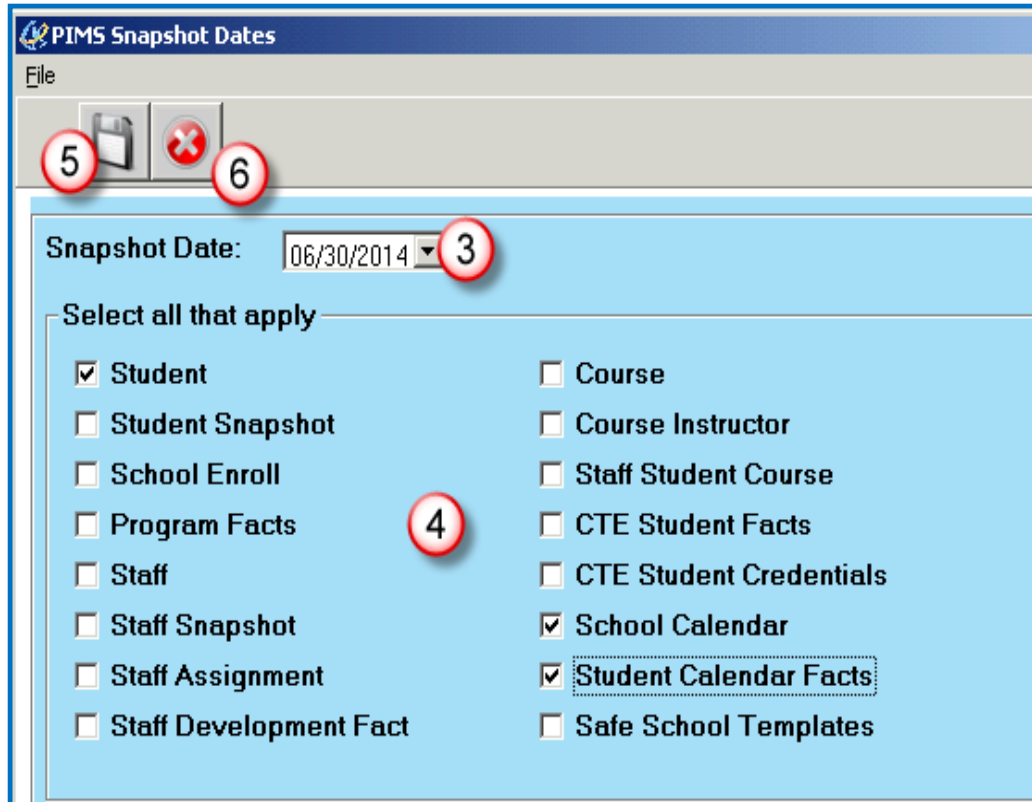
PIMS Child Acct EOY

PIMS Export Management

Note: We have noticed several locations that throughout the year last year had entered various random dates in as Submission Dates. This should not be done, only **actual valid** PIMS Submission Dates should ever be added to this dropdown, adding additional dates that do not match actual PIMS Submissions can affect the validity of your exported data.

PIMS Child Acct EOY

PIMS Export Management

Getting Started:

Double click > Modules > Double Click PIMS Management > Click PIMS Export Management

- Once back at the Initial PIMS Export Management

  1. Click the Submission Date drop down arrow & select the submission date that you just added

  2. Check the boxes for the templates that are due for the PIMS Child Acct EOY Submission which are Student, School Enrollment, School Calendar, and Student Calendar Fact

  3. If you want the file headers included on your export files check the Include Header box

     - If you export your files with the headers included, on the PIMS Site when you upload the files you must check the boxes for include headers for each file.

  4. To export the files click Save (floppy disk icon)
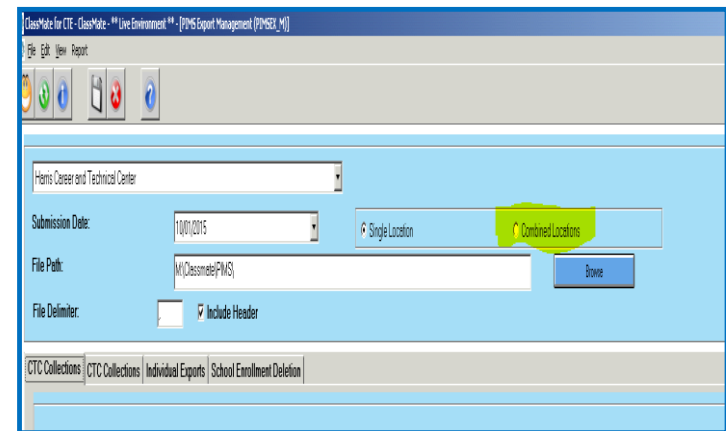
PIMS Child Acct EOY

PIMS Export Management

PIMS Child Acct EOY

PIMS Export Management

Getting Started:

Double click > Modules > Double Click PIMS Management > Click PIMS Export Management

- Multi-location processing for most export files, except Safe Schools, must be uploaded as 1 combined file.

- When exporting multi location information, clicking the Combined locations radio button on the right of the submission date drop down will create 1 export file which will include the export template data for all locations.

- PIMS does not require multi-locations to submit combined location files; however, if your site has students who move from one Location to the other Location thru out the school year, we highly recommend you submit your files as a combined location file. In the past, we found that submitting individual location files in some situations resulted in DQE errors on students who moved from one location to another.

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Questions? Contact us!
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