FOCUS Training: Nurses/Health

Training Agenda

- Basic Navigation of SIS
- Searching for Students
- More Search Options
- Student Record and Sub menus
  - General Demographics
  - Enrollment record
  - Student Schedule
  - Medical-related tabs
- Updating student fields
  - Mass Adding Log Records Individually and by Group
  - Update through Advanced Report

Objectives

- To use various search criteria to locate students
- To navigate and view student information fields
- To update student information in a variety of formats
- To create user-specific Advanced Reports and update info from report
- To mass add screening records

Training URL:

train.focus.collierschools.com

Survey Monkey link:
Overview of the Portal Page
The Portal Page is the user’s “entry” to Focus SIS. The layout and menu items are determined by the district and are based on the permissions assigned to the user’s profile.

Header Options
1. *Click the FOCUS logo* in the top left corner from any screen in SIS to return to this page.
2. **Profile Pull-down**: Single profile users will not see a pull-down. Users with multiple profile types – for example, teacher and parent – can toggle between their roles from the Profile Pull-Down Menu.
3. **School Pull-down**: Users with access to multiple schools can toggle between schools.
   (NOTE: Single-school profile users will not see a pull-down).
4. **School Year Pull-down**: Users can access course information from past, current and future school years. When the user is in any year other than the current year, the menu background turns from grey to blue (when using the top menu bar; background turns red when using the optional side menu bar).
5. **Marking Period Pull-down**: Users can select a specific grading period to view information.
6. **Main Navigation Menu**: all student information and user-specific programs are accessed from these pull-downs (information contained under each Menu tab is limited by the user’s profile and permissions).
These next items are the Portal Modules:

7. **Find A Student**: Provides quick access to search for students by first or last name or by student ID number (search is not case sensitive and full name is not required).

8. **Messages**: contain reminders from the district and administrators regarding deadlines, meetings, etc. and are school-specific. Message displays for 7 days. *Click on hyperlink to see detailed information.*

9. **Upcoming Events-Calendar**: provides a direct link to the 30-day school calendar; displays the next seven calendar events set by the district or administrators. *Click on Event Name or View Calendar to see details.*

10. **Featured Programs**: Profile-specific links (shortcuts) to SIS features used most often.
    - *Click on the program link* to navigate to that screen. Each of these programs can also be accessed via the navigation menus and attached pull-downs at the top of the portal page.
    - *Click on the grey arrow* next to “ALL PROGRAMS” to open links to all SIS features the user has permissions to access (same as menu tabs at the top)

11. **Alerts**: profile-specific updates generated automatically by Focus or by district administrators. Alerts could be: added/dropped students, updated student information, newly enrolled students, when data input is needed (attendance, grades, etc.). *Click on hyperlink for more information or to take a specific action.*

12. **Focus University Courses**: Profile-specific links to videos, webinars and courses to learn features within Focus.

**Options in the Footer**

13. **Help**: provides on-screen documentation for the page currently being viewed by the user. User is provided the option to open Help document in a new window.

14. **Log Out**: for system security, users must use the Log Out button to properly exit Focus SIS.

**Other Navigation Features**

- Avoid using the browser back button, as this may not always function properly (*press F11 to remove; press again to view*).
- Use the menu tabs and dropdowns to navigate from one screen to another.
- When on the Demographic and Enrollment screens, users can change to a different student by clicking on the student search bar to open the pull down and select a name or start typing in the text field; or use the arrows to toggle the list.

On all other screens, users will see a simple Search bar and/or grey triangles for toggling.
- When users conduct a search resulting in a list of students and have selected a student from that list, clicking on “Back to Student List” link at the bottom of the page returns the user to the search results.

- Close the currently viewed student record by clicking the red X next to the student’s name in the header.

**Searching for Students**

There are several ways to find students or a specific group of students from each of the search modules. Users can **enter an ID#, a full name or partial name**. Searches are not case sensitive.

*Example: The following will include “Colin Abbot” in results: “abbot, c”; “colin a”; “co ab”; “ab, co”*

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**Find a Student** on Portal page:

- **Click SEARCH without entering any criteria**; this will return a list of all active students in the school (called a Simple List)

OR

- **Enter any combination of letters** to return students with first and/or last names matching that combination

OR

- **Enter a student ID number or multiple IDs separated by a comma**

With any of the search options above, users can:

- Include the option to **Search All Schools**
- Include the option to **Include Inactive Students** (students who withdrew during the current school year)
  - Checking this box will open the additional option to **Include Previous Years Inactive Students**

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**Featured Programs: Student Info** on Portal page:

- **Click SEARCH without entering any criteria**; this will return a list of all active students in the school (called a Simple List)

OR

- **Click on SIMPLE LIST**

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**NOTE:** Searches are not case sensitive
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- **Enter any combination of letters** to return students with first and/or last names matching that combination

OR

- **Enter a student ID number or multiple IDs separated by a comma**

With any of the search options above, users can:

- Include the option to **Search All Schools**
- Include the option to **Include Inactive Students** (students who withdrew during the current school year)
  - Checking this box will open the additional option to **Include Previous Years Inactive Students**

### Students Menu > Student Info Search Options

- **Click SEARCH without entering any criteria**; this will return a list of all active students in the school (called a Simple List)

OR

- **Click on SIMPLE LIST**

OR

- **Enter any combination of letters** to return students with first and/or last names matching that combination

OR

- **Enter a student ID number or multiple IDs separated by a comma**

With any of the search options above, users can:

- Include the option to **Search All Schools**
- Include the option to **Include Inactive Students** (students who withdrew during the current school year)
  - Checking this box will open the additional option to **Include Previous Years Inactive Students**

Selecting this:

Opens this:

The search options above all return a **Simple List** of students, except when the user has searched for a single student.
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- Student names are generally displayed last name first.
- This list has a heading that shows the total number of students that resulted from the search.
- The excel icon allows users to export this list to an Excel spreadsheet.
- The list can also be printed as a PDF by clicking the icon at the bottom of the screen.
- Clicking the heading of each column – Name, Student ID, or Grade – will reorder the Simple List by that data.

More Search Options
Many searches require more criteria than a student’s name or ID number. The More Search Options feature allows the user to search by detailed data for students. By clicking on the More Search Options link on the search screen, a list of every data field in SIS will display. Clicking on any of the links will open fields within that feature. Users can set as many parameters as necessary, which will yield more specific search results. To be pulled into the list, students must meet all the selected search criteria.

Click the grey arrow to open the links:
Four sections for more search options are available:
- General Searching
- Menu Searching
- State Reporting Fields
- Student Field Searching

General Searching:
Select criteria for a group of students based on name, ID number, address, grade level, or the calendar.

Menu Searching:
The second section provides searching options based on the Focus menus as well as Enrollment and Computed fields.
Click on any grey arrow to open the link to select the data fields desired

Examples:

Click on Scheduling to search on a scheduling option such as students Scheduled into a specific course, Scheduled into a specific section or Scheduled with a specific teacher

State Reporting
The third section is the Florida state reporting fields section. State reporting fields from the master schedule, student schedule and course catalog are available.

Student Fields
The fourth section allows the user to search on all the student information fields in the SIS.

The tabs and fields within the tabs that display are based on the user’s profile and permissions.
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**Click on the Immunization tab** to view available fields for search criteria.

![Immunization Tab](image)

**ACTIVITY**

Directions:
1. Pull a list of all students using the **Find a Student** search bar on the Portal page.
2. Use **More Search Options** to find students scheduled into a specific course.
3. Use **Student > Student Info** to find all students with a last name beginning with S.
4. In the current list, click on a student name and use the white navigation arrows to go to the next student in the list.
5. Use the student name dropdown to find a different student in the list.
6. Click on the “Back to Student List” link at the bottom of the page.
7. Close any student record that may be open and navigate back to the portal page.

**Viewing Student Sub-Menus**

**Student Sub-menus** are quick links to the student’s record. Users can view the student’s general information and other student data such as **enrollment records, schedule, and absences** through the **sub-menus**.

- Locate the student by name or ID number from the Portal **Find a Student search screen**, the **Student Info** link in **Featured Programs**, or from the **Students menu > Student Info**

**Demographics**
The Demographics Sub-Menu displays various tabs on the left-hand side of the screen that show any necessary information associated with the student. Use the right scroll bar to scroll down the screen.

- Scroll down the to the desired field or use the Filter Fields... search box to type in the field name

- Click on the field name to view the student data for that field:

- Click on the grey arrow to expand or collapse a screen.

Enrollment
The Enrollment Sub-menu displays the student’s enrollment records. The chart layout (default view) allows users to scroll horizontally. Click on the View button to scroll the record vertically.
Depending on user permissions:
- **View** allows users to view/edit enrollment records vertically, as well as tab through fields for faster data entry.
- **View** may not be visible on all enrollment rows.
- Clicking **Return to Enrollment** returns users to the horizontal chart view.

**Schedule**
The Schedule Sub-menu displays the student’s current schedule. Depending on how the school’s schedule is set up, the student’s schedule may show tabs for **Full Year, Semester 1, and Semester 2**. (This does not apply to elementary).

**NOTE: Be sure to uncheck the boxes for “Show Florida Fields and “Show Vocational/WDIS Fields”**

**Medical Tabs**
There are several medical-related tabs on the student’s Demographic screen that each house specific data. Each can be located by scrolling down the list, which is organized in alphabetical order, or by entering the field name in the Filter Field...search box.
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- Most fields can be updated through the use of drop-downs, from which the user would simply click on the desired choice to populate the field. Other fields are updated via open text fields. The SAVE button must be clicked after making any changes to the student’s record.

Medical
- This tab may contain a variety of medically related fields such as health conditions, allergies, dates for exams such as school physical, IHP, IEP and 504 data. Use the right scroll bar to scroll down to view all fields on this tab.

All required data fields are marked with a red asterisk.

Grey fields will darken when data is changed or entered; save button will turn red
- Health Examination Status should be same as that on the Immunization tab
- Health Examination Date should be same as that on the Immunization tab
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- **Immunization Status**: select option from the drop down:

- **Alerts**: check the box for any conditions noted on the Emergency Card
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- **Health Conditions**: select applicable condition from the drop down and enter start/end dates. Use the tab key to navigate from field to field. After clicking the save button, a new row will appear if additional conditions need to be added.

- **Individual Healthcare Plan**: select applicable condition from the drop down and enter start/end dates. Use the tab key to navigate from field to field. After clicking the save button, a new row will appear if additional conditions need to be added.

- **Physician and Dental**: enter information from Emergency Card. Fields are open text fields. Use the tab key to navigate across the row. After clicking the save button, a new row will appear if additional doctors need to be added.

- **ESE Exceptionalities**: if applicable to the student, these fields will auto-populate

- **Doctor’s Note**: if the box is checked, enter Comments in the text field
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NOTE: Any record with the Export icon can be saved as an excel spreadsheet or pdf.

Medical - Clinic Visit Log

Student visits to the school clinic are documented on this tab either by the school nurse or other designated individual. Specific service and codes reflecting actual services provided can be documented and the information in the fields can be pulled into various reports.

- Use the tab key to navigate the fields. Update fields via checkboxes, pull downs or open text. After clicking the save button, a new row will appear for additional entries.

Immunizations

Student Immunization records will be updated by data entry and nurses will have view-only rights to these records.

- Student shot records are added or updated using the drop-downs to select the vaccination. Users can tab from field to field to update the fields.
Medical - Health Screening

The Nurses will update students’ screening records and data entry will have view-only rights.

- There are separate date fields for the screening and the actual examination.
- Use the tab key to navigate across the fields. Data is entered via dropdown menus, open text fields and calendar entries.
- After clicking the save button, a new row will populate for additional entries as needed.

Each of these fields can be updated on the individual student’s record or mass updated (see next page).
Note: if a student passes the screening, no other information is required. If the student fails, enter additional information in the Screening Comments field.

Mass Add Log Records for Individual Student
Logging fields for screenings can also be updated for an individual student via **Mass Add Log Records**. From this option, users will have access to a list of all the students in the school and can simply enter the student name in the Student field rather than search for the individual student from the Student Info search box.
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- Go to Students > Mass Add Log Records
- Select the “By Student Tab”
  
![Image of Mass Add Log Records]

- Use the Logging Field pull down to select the screening record to be updated for the student.
  
![Image of Logging Field]

- The system will automatically update to display the required fields.
  
![Image of System Update]

- Enter the desired student’s name in the “Student” box or scroll and select the student from the list
  
![Image of Student Selection]

- Update the fields as applicable. Be sure to click the SAVE button in the upper right after making entries.
Focus provides a method for adding multiple student screening records. This process is particularly useful when schools are performing screenings for large groups of students. As screenings are completed, the records can be input in the system at that time.

To begin the process of adding records en masse click the **Students** Menu and select **Mass Add Log Records**.

- Select "By Group"
- Click on **More Search Options** to set the search criteria for the group of students, such as all 6th graders.
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- Click Search to return the desired list of students

At the top of the next screen,

- Use the pull down to select the type of logging field to be updated, i.e. Vision.
- Based on what is selected, fields will display to enter the date of the screening and a pull down will appear from which to select the desired screening test.

This will display a master set of all fields contained in that screening test’s logging fields.

The screenshot below shows an example of adding *Instaline vision screening* records en masse for a specific class of students.

- Selections made in any of the fields in the master set will populate the corresponding entry for all of the students listed on the screen (in the example, the **date** and **test type** are filled in the master set).
- Use the checkboxes to the left of each student’s name to select the students whose records are being updated.
- Enter any student-specific results from the screening in the row of fields aligned with each student.
- Once all data has been entered, click the SAVE button in the upper right corner.

**Only the records of the selected (check box marked) students will be updated upon clicking SAVE.**

In the above example, students are coming for the screening from their High School English teacher’s class. The students will come at different times of the day but the screener can have the list open until all students from this teacher has been seen. Once records are saved, a green confirmation message will display.
Activity

1. Choose a group of students to Mass update vision screening records.
2. Update a screening record for an individual student.

Advanced Reports

With Advanced Reports, users can compile, view and update specific student data. The More Search Options feature is used to define a specific group of students that pull into the report. Data in the report can be filtered, corrected and saved within the report, and the report can be exported into Excel or a PDF. file for printing/saving. The search criteria used can be saved for future use and easily accessed from the user’s Report menu on the portal page.

To create an Advanced Report, from the portal page:

- Navigate to Students > Reports > Advanced Reports

From the Advanced Reports screen, a Student Search module will be displayed, along with a More Search Options button, Available Fields dropdowns, Fields to Include in Report box, and options to search all schools and/or inactive students. This screen will dictate the content specifications of the entire report.

- **More Search Options**: (left column) This will define a specific subset of students to be included in the report

  - Click on the gray arrow to open the fields for search criteria. Scroll to find and select the desired student fields (such as students scheduled into a specific teacher’s class)
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If selecting criteria from different fields, the students must meet ALL the selected criteria to be pulled into the report. If selecting multiple criteria from within the same field, such as using checkboxes, the report will look for any student meeting any of the selected criteria.

- **Available Fields**: (middle column) All tabs located in the Student Info screen are listed in this column. Each field category can be clicked to reveal a drop-down list of blue boxes containing data relevant to that field.
  - Click and drag the blue boxes into the Fields to Include in Report box (or simply click the green + sign)

- **Fields to Include in Report**: (right column) All fields will be ordered as they appear in the box and can be rearranged as needed by clicking and dragging the field box up or down. The Field boxes can also be deleted by clicking on the red X or by dragging them back to the Available Fields box.

Once all report parameters are set to be included, click the Run Report button (users may want to check the box for Search all Schools before running the report)

After viewing the results of the report, the report can be modified (causing Search Options to have to be reset), mass updated, filtered and/or saved.
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**Activity**

Create an Advanced Report following the steps above. Include fields of your choice but be sure to include at least one field that would be updated by nurses.
- Filter the report to display a field containing a specific set of data that may need to be changed or completed.

**Mass updating student fields on Advanced Report**

Advanced reports can be used to update specific types of student fields in instances where the same information will be applicable to all students selected. *It might be prudent to filter the report before mass updating so that only the necessary students will display for updating, e.g. filter to show Temporary Certificates to be updated to complete.*

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### Advanced Report

<table>
<thead>
<tr>
<th>Last, First M</th>
<th>Student ID</th>
<th>Grade</th>
<th>School</th>
<th>Immunization Status</th>
<th>Vaccine Certification Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbott, Coin</td>
<td>61079/8776</td>
<td>12</td>
<td>Focus High School</td>
<td>Dh or HRS 880A or A-2 (B)</td>
<td></td>
</tr>
<tr>
<td>Abbott, Jaring</td>
<td>610102191</td>
<td>09</td>
<td>Focus High School</td>
<td>Dh or HRS 880A or A-2 (B)</td>
<td></td>
</tr>
<tr>
<td>Abbott, Finna</td>
<td>6100000033</td>
<td>10</td>
<td>Focus High School</td>
<td>Dh or HRS 880A or A-2 (B)</td>
<td></td>
</tr>
<tr>
<td>Abbott, Tyler</td>
<td>610508223</td>
<td>12</td>
<td>Focus High School</td>
<td>Dh or HRS 880A or A-2 (B)</td>
<td></td>
</tr>
<tr>
<td>Abbott, Vincent</td>
<td>610304983</td>
<td>08</td>
<td>Focus High School</td>
<td>Permanent immunization</td>
<td></td>
</tr>
</tbody>
</table>

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- Click on any column header to sort the report
- Click on **Filter** to filter the report based on column headers to a specific subset of the results
- If **Modify Report** is selected to change the fields included in the report, users will have to select the Search options again.
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- Click on the Mass Update button

- Select the column that requires mass updating.

- Choose the information to update from the next pull down that appears

- Click Run Mass Update

The updated field will become open text boxes for any further editing before saving changes. A red Save button will also display in the upper right corner.
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- Click the red save button after all data has been updated as desired. The changes will show immediately on the updated students’ records.

**Saving the Report**

Save the parameters and data results of the **Advanced Report** by clicking the **Create Report** button at the bottom of the returned results report screen. *Note: Using the Save button at the top right of the screen only maintains the defined parameters of the report and not the data results.*

The Saved Reports screen will appear prompting the user to name the advanced report.

After clicking OK, a confirmation screen will appear on the **Saved Reports** tab with a green checkmark indicating the report has been saved.
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Reports created and saved by the user are saved under the **My Reports** tab. The **Published Reports** tab contains reports created by other users and published to specified users.

- The saved list of reports can be exported to Excel or printed using the appropriate icons.
- Users also can turn filters on to drill down on the report list.
- Clicking the blue arrow at the beginning of the line allows the user to run the report directly from this screen.
- The name of the saved report can also be edited by clicking on the blue dotted line under the report’s title.
- Select the **Profiles** drop boxes for the desired user groups. This screen auto saves when the users advances to the next line by clicking into one of the editable boxes and pressing enter.
- Clicking the drop down under **Schools**, the user can choose to publish the report to the current school or all schools (depending on permissions).
- Clicking on the dash at the end of the line will delete the entire report.

- **Accessing Saved Reports**

To access saved reports, navigate to the **Reports** menu and select the report from the pull-down list:

**Types Of Reports under this tab are:**

- **District Reports** – created by District Administration and shared with select user profiles
  
  *Note: If a user does not have permissions to certain student fields included in the report, the fields will appear empty.*

- **My Reports** – created by the user; accessing from here will open the report results

- **Published Reports** – shared with select user profiles by another user
  
  *Note: Depending on the user’s profile, reports can be shared with school staff or all schools.*

- **Saved Reports** – displays a list of reports the user has created; selecting a report from this list will allow the user to edit, delete, and share the report further
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- **Modifying and Filtering a Saved Report**

  If a Saved Report is Modified or Filter Rules are added later, the user can resave the Advanced Report by clicking Create Report at the bottom of the screen.

  When a saved report is modified, a slightly different save screen will be displayed providing options to Save & Overwrite or Save as a New Report Instead.

  ![Confirm Overwrite of Existing Saved Report](image)

  **Note:** If “Save as a New Report Instead” is selected, the Create New Saved Report window will be displayed.

  Printing the Report

  An Advanced Report can be exported as a Microsoft Excel spreadsheet by clicking the computer disc icon located above the generated list, or as a Focus PDF document, by clicking the Print icon at the bottom of the page.