Search Basics

The Search for Students feature allows users to search and create their own reports using any filters they choose, and display whichever fields of data they would like to see, with many options once the data is displayed.

This feature consists of four main parts:

**Filters:** The information that tells SEIS what to information you would like to search by. (This is how you filter for the records you want)

**Columns to Show:** What information you would like to view for those students that are displayed.

**Results:** The individual bits of information about each student.

**Task to Perform:** What you want to do with your results (print, download, research, etc.).

Where Does Data Come From

Data for any search comes from the Student Record, not the Current IEP.

All Demographic and CASEMIS fields are shared between the Student Record and the Future IEP. Good system management means communicating with your teachers and viewing the home page notices to ensure IEPs are being held and affirmed. Affirming IEPs will check for any CASEMIS errors, which will return accurate results when creating searches at the District/SELPA level.
Search Filters

The Basics

Search filters are how you determine which records will display in your search results. Filters are selected in the upper half of the Search for Students page.

Some fields are added to the search by default. These fields are School of Attendance, Last name, First Name, Student Exited.

Student Exited defaults to NO. This filters out Exited Students from your results. If you do not remove this filter, your search will pull up all Eligible and all Pending students that you have access to.

If you want to display Exited students, change the filter to Student Exited = Yes.

Additional Filters

Additional Search Filters are available in the “Additional Search Filter” drop down.

- **Include who are not served in this district but are residents:** These are students whose District of Residence is yours, but who are served by another District.

- **Display only students who have transferred out of your District/SELPA:** This is where you can search for students who have TRANSFERRED to another District/SELPA in SEIS.
Specifics of a Search

The search filters allow you to select the information that you would like to search by. This list includes nearly every field on the Student Record, including Custom Fields.

When you select a filter, the options to the right will change to reflect choices specific to filter.

To narrow your results further, you can add additional search filters.

Remember, you are searching on the up-to-date information that is on the Student Record, NOT old information that is stored on Current or Historical IEPs.

“AND” Style Search

The search function is an AND search function. Using multiple filters creates an AND style of search, looking for students who meet this filter AND the next filter and so on. The more filters you add, the narrower your search results will become.

For example, searching for all students who:

- are at SEIS Gate School AND
- are greater than or equal to age 15 AND
- whose Trans Reg 1 is a No AND
- who are not Exited

The students in these results will fit into all of these categories.
The “NOT” Function

The NOT checkbox allows you to search for all of the fields in a filter except those selected. For example, searching for all students who are:

- at Bayside High AND
- are greater than or equal to age 15 AND
- whose Trans Reg 1 is a no AND
- who are not Exited AND
- who do NOT have code 220 – Hard of Hearing as their primary disability

This will give you results for students who meet filters 1-4 and do not meet filter 5. In other words, students who meet filters 1-4 and have any disability listed except Hard of Hearing.
Field Types

Date Fields

Date fields require you to enter two dates in MM/DD/YYYY format. You are searching for matches between those dates.

Date fields are grouped alphabetically, all starting with the word DATE.

TIP: If you create CUSTOM Date Fields you may want to title them as “Date of...” so they are easier to locate in the searches.

Less Than / Greater Than Fields

Some filters such as Age, Discipline Days, Service Record Count can be filtered by less than, greater than, equal to, less than or equal to, and greater than or equal to.

Please note: The difference between the “Greater Than” and the “Greater Than or Equal To” style choices. One will include the number you are searching by and one will not.

You can also use the filters twice, in different directions, to create an “AND” style search. For example: Age equal to or greater than 2 and less than or equal to 5, will show kids with an age of 2 through 5.
**List Fields**

List fields are those that have a list of options to choose from. These types of fields allow you to pick one or more options from the list to search by.

For example: You can select multiple schools of attendance or multiple grade levels.

Selecting multiple options in a LIST creates an OR style search on that field. This allows you to search for students who match this option OR that option.

Lists only work as an OR because they are options in the same search filters field. Since you couldn’t have a student with 2 schools of attendance, you can search for one value or another.

To select multiple options, hold down the Ctrl key and click on your selection(s).

**Drop Downs**

Drop down menus show a list of items that you are able to choose from. You are only able select one as a search filter.

All Yes/No fields will be drop down menus in the search function. Fields related to services are often drop downs, such a Frequency.

**Text Boxes**

Text box fields are used when searching for student names, parent info, SSID numbers, and other data that cannot be presented in a set list of options.

This means that if you put “SMITH” in the Last Name field you will get all SMITHs’ but if you also add “LISA” to the first name field you will only get students named LISA SMITH.
Custom Fields

Custom fields can be used as search filters or columns to show in results. All custom fields, when created, use the same format as the other SEIS fields.

Blank Fields

Drop Downs / Lists

Finding empty fields, depends on the type of field you search. Lists and drop downs have a “Blank” option built in. You can also download the results to Excel, and filter only the blanks. This is very helpful for large Districts or SELPAs.

Dates and Greater Than / Less Than

Dates and “greater than” /“less than” (<, >) field types do not have a “Blank” option to search on.

To find students with blanks in these types of fields, select the field in the Columns to Show section. Once you have your results you can sort by clicking on the header for blanks.
Text Boxes

To find students with blanks in these types of fields, enter the word “Blank”.

A “Blank SSID” search is a good one to create and save. SSID numbers can be very helpful if a duplicate record is found.

Columns to Show

The Columns to Show section allows you to select the information that you would like to see in the results.

You can add additional columns by clicking the Add New Column Link, or the “+” icon.

To remove a column, click on the “−” icon.

Only the columns you select will show in your search results.
Types of Reports

In addition to the basic Student Report, SEIS has several other report types available.

To view these, click the "Select Type of Report" dropdown. The Student Report is always the default selection.

Service Type Reports

Service Reports will give a single row of information for EACH SERVICE. This means that a single student can appear multiple times if they have more than one service listed.

Remember, you are searching on the Student Record, so you will see services from the Table B Tab which links to the Services Grid on the FUTURE IEP.

- CURRENT Services: Will pull in all services on the Service grid.
- DUPLICATE Services: A good report type to use to mark duplicates DNR in bulk for CASEMIS reporting.
- PRIMARY Services: The services in the number 1 position on the IEP.
- ESY Services: Will pull in all services in the ESY section.
- MENTAL HEALTH (500 Code) Services: Will pull in all students with Mental Health Services.
**Duplicate Reports**

It is very important to keep a SINGLE record for each student.

We recommend that you run duplicate reports often. If you see a pattern of duplicate student records being created, you will need to take steps to correct the issue.

Make sure all users who have the permission to create new student records understand the importance of having one single record per student in SEIS.

**DRDP Report**

This report will give specific information about the current DRDP reporting period. It can be helpful to create and share a search so that all users can see which students should have a DRDP completed.

There are two great searches outlined in the FAQ section with instructions on searching for DRDP reports for either the Spring or Fall reporting periods.

When using DRDP fields in your search filters, you MUST use the DRDP type of search or it will result in an error.
Saving and Sharing Searches

The first step in creating your custom search is to add any Search Filters and Columns to Show the results that you need.

If categories have not yet been created, simply click the Manage Categories link. You can create categories to organize your searches.

To add a search to a category:

1. Click the Manage Categories link.
2. Title your search.
3. Click the Add/Update Button.
4. You will now see the category in the Select a Category drop down.

If categories have already been created, the category titles will appear in the Select a Category drop down.

You can add your most commonly used searches to your Top 5 Home Page Favorites. This way you can access those searches right from your home page.

To add a search to your Top 5 Home Page Favorites:

1. Simply click the check box (Add To Top 5 Home Page Favorites).
2. Click the Save button.
3. You will see the Top 5 Searches on your Homepage.

As a District/SELPA level user, you can share your searches with other District/SELPA, school site, and/or teacher level users. This is a great way to prepare for CASEMIS or clean up student information.

To share a search

1. Click the **Save and Share** button.
2. Select the user levels that can access the search.
3. Leave any comments relevant to the search.

Creating a search for your users will save them time and they will have instant access to those results. As edits and corrections are made, the search will yield the updated results. This is because Saving and Sharing a search saves the search filters, not the results.

Changing a Search

Copy this Search and Redefine Search links will be available for all searches that you have created.

The Copy this Search link will copy all search filters and columns into a NEW search that you can then change and save if necessary.

The Redefine Search link will allow you to make updates to the existing saved search.

ONLY the user that created the search can redefine it.

Naming a Search

When naming your searches avoid using special characters in the title. Using special characters such as, <, >, / and others can be read as program code and may result in an error or strange format. Also, if you download your results, those characters are not accepted in Excel.

If you download a search and it opens as a blob of text...look for symbols. If you try to print and get a blank page, take these symbols out of the title of the search.
Results

Status Bar

You can use these color codes to easily identify the status of the student record.

Please note the Status Key. It is color coded with four colors.

- **Blue**: This student has been marked Do Not Report.
- **Orange**: The student has been exited or is ineligible.
- **Green**: The student is in pending eligibility.
- **Pink**: The student’s DOS (District of Service) does not match the DOR (District of Residence).
What To Do With Results

Now that you have your search results, what can you do with them?

Your options will depend on:

- Your individual user permissions.
- The type of search you have run.

Service Reports do not have the full range of options that more basic reports have. Teacher level users also have fewer options than School Site, District, or SELPA level users.

You can print, download, or make bulk changes to ALL of the students who come up in your search or you can select just a SUBSET of student records. To select a subset, check the box next to each student’s name that you would like to be included in the task. Subset will auto select.

Bulk Changes

You can make bulk changes to any group of students that you select in your search.

**Types of Bulk Changes include:**

Please Note: Bulk changes are permission and user level based.

- Make Bulk Changes
- Bulk Add Providers
- Bulk Updated Providers
- Bulk Add Services
- Bulk Transfer Students
- Bulk Update Custom Fields

Important: if you make a mistake when bulk updating students, please contact the SEIS Help Desk immediately. If you are interrupted, please create a search to see if you have already completed the bulk update before processing again.
If you are updating grade levels, start with the 12th grade and work down to the lower grades. If you make a mistake, call the Help Desk immediately.

Multi-district SELPA’s should agree on procedures for bulk transfers. Will you change grades first? Remove or leave providers on records?

For more information on bulk changes, please refer to the District/SELPA Level User Manual. You can download the User Manual from the Help Center in the upper navigation bar. Also check for additional PowerPoint presentations and videos in the Help Center.

Extras

The Download Data feature available for search results will download the selected results onto your computer as an Excel file.

Excel files can be imported into Microsoft Word to create mailing labels or into databases such as Access or Filemaker.

The Download Mailing Labels option in SEIS works with the Microsoft Word and mail merge. This option will automatically pull address data fields.

By saving and sharing searches, you will help save users a lot of time and ensure that they are getting accurate results. By downloading to Excel, you can further filter your results and create graphs/tables to compare your data.

Thank You

We hope you find this information helpful, please feel free to contact the SEIS Help Desk if you have any questions about the Search and Report Features.

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