
Tutorial: Automating Permit Management (With Imported Student Grades and Attendance Data)

This tutorial will walk you through the process necessary to define a permit management schema and demonstrate how it can be used to successfully automate the management of work permits.

Background:

The purpose of issuing work permits to minors is to protect the student's health and safety in the workplace and ensure that employment does not adversely effect the student's academic success. To accomplish this, it is necessary to periodically evaluate the student's GPA and school attendance. This task, if performed manually, would be time consuming and would need to be repeated at the beginning of each new grade report period.

QuickPermit™ provides a tool to import the GPA and attendance records. Because this is a critical component of the permit management process, it is recommended that you first direct your attention to the task of importing student data into QuickPermit™. This will serve another important benefit -- it will eliminate the need to manually enter student data in order to issue a work permit (a huge time-saver). To learn more about how to import student data, see the tutorial "Importing Student Data".

If you are unable to import student data or simply choose not to, QuickPermit™ can still play an important role in the process of managing compliance with your district qualification standards. Because the processes for managing work permits differs based on whether or not GPA and attendance data can be imported, two separate tutorials are provided -- one for those that are successfully importing student data (including GPA and attendance) and one for those that are not. For managing work permits without imported student data see the tutorial, "Managing Work Permits".

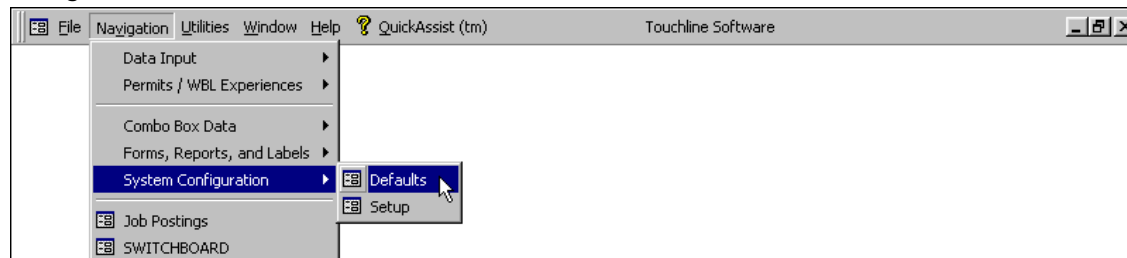
Permit Management -- With Imported Student Data:

Set Configuration Options

Step 1

Open the DEFAULTS form by using the NAVIGATION menu as shown below:

"Navigation" menu



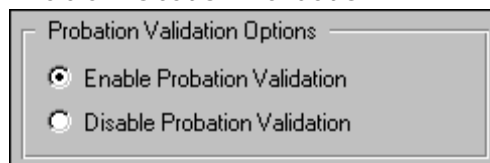
Step 2

Select the "System" tab



Step 3

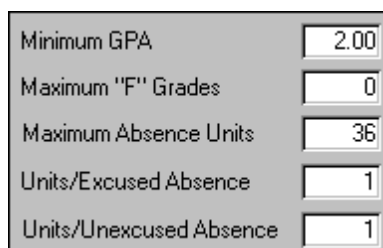
Enable Probation Validation



Step 4

Define Permit Qualification Criteria

Students must meet all qualification criteria to be qualified.



- GPA (enter the minimum qualifying GPA as a decimal)
- "F" Grades (enter the maximum "F" grades allowed)
- Absences (enter the total allowed period absence units)
- The last two fields define a weighing for treatment of "Excused" vs. "Unexcused" absences. If, for example, you'd like for unexcused absences to count more than an excused absence, then you could enter a higher weighting for "Units/Unexcused Absence" (i.e. 1.5, 2.0, etc.).

Step 5

Define the School Year

Start of School	<input type="text" value="08/12/2003"/>
End of School	<input type="text" value="06/10/2004"/>

Enter all dates in the format shown: (mm/dd/yyyy).

Step 6

Define Probation Periods

No. of Probation Periods	<input type="text" value="4"/>
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Enter the number of probation periods for the school year. Generally, it's best to synchronize probation and grade report periods. To do this, enter the number of grade report periods.

Enter the ending date for each probation period.	
1st.	<input type="text" value="11/01/2003"/>
2nd.	<input type="text" value="01/15/2004"/>
3rd.	<input type="text" value="04/01/2004"/>
4th.	<input type="text" value="06/10/2004"/>
5th.	<input type="text"/>
6th.	<input type="text"/>

Enter the last day for each of the probation/grade report periods that were defined above.

Enter the dates in chronological order to avoid receiving date validation messages.

The ending date of the last period cannot be greater than the "End of School" date.

Establish a Permit Management Schema

The collection of business rule options that you select will define your permit management schema. It is neither necessary nor advisable to use every available business rule option to define a management schema. Even if it serves to produce a superior "theoretical" management model, it would be difficult to incorporate into written district policy and lead to confusion among students and parents.

To make this as simple as possible, a single management schema will be introduced and graphically displayed. Making it your model will be as simple a copying the settings. The effect of selecting this model will be discussed in detail. In addition, each of the available business rule options will be discussed to allow you to make an informed choice for determination of a permit management schema.

Suggestion: Upon final determination of a permit management schema, take the time to accurately create a written definition that can be formally incorporated as district/school policy. Using QuickPermit™ to automate the policy you've established will ensure that it is fairly and consistently applied to all students.

Model Business Rule Selection:

Step 1

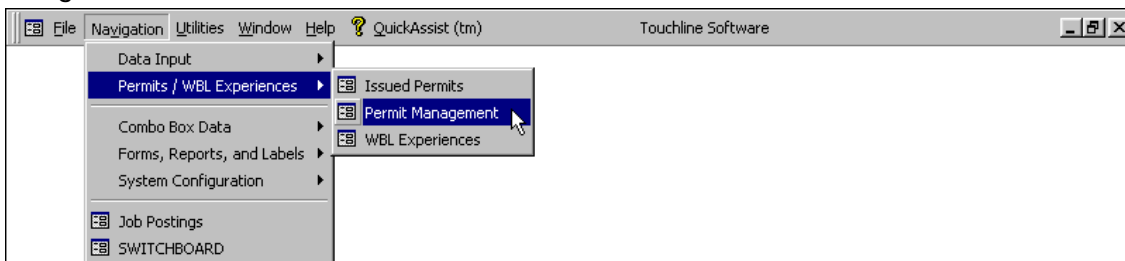
Open the PERMIT MANAGEMENT form either by selecting the "Probation and Revocation" hyperlink on the Main Switchboard or by using the NAVIGATION menu as shown below:

Note: To open the PERMIT MANAGEMENT form, it is necessary that you have completed the topic "Set Configuration Options" (above) and have issued at least one work permit in the current school year.

"Probation and Revocation" hyperlink

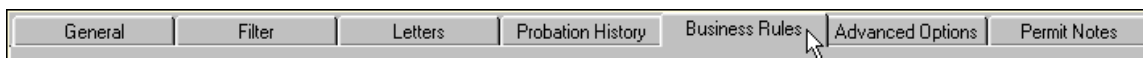


"Navigation" menu

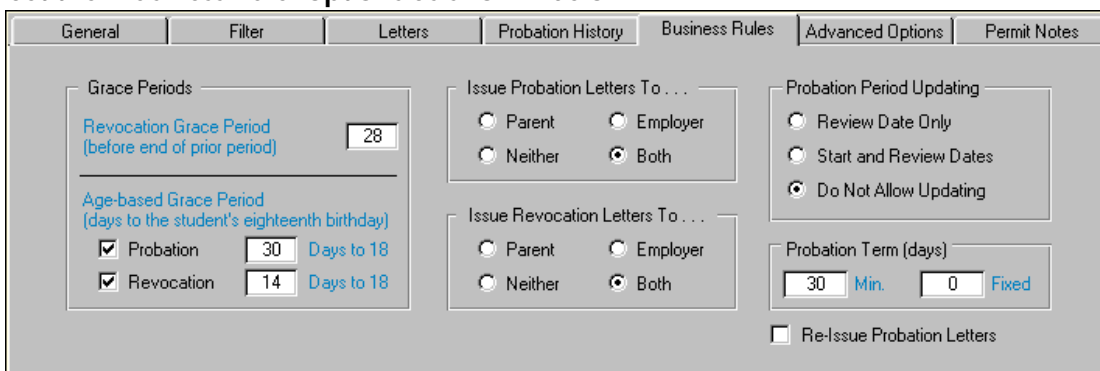


Step 2

Select the "Business Rules" tab.

A screenshot of a software interface showing a row of tabs: General, Filter, Letters, Probation History, Business Rules, Advanced Options, and Permit Notes. The 'Business Rules' tab is highlighted, and a mouse cursor is pointing at it.**Step 3**

Set the "Business Rule" options as shown below:

A screenshot of the 'Business Rules' configuration window. The window has tabs for General, Filter, Letters, Probation History, Business Rules (selected), Advanced Options, and Permit Notes. The 'Business Rules' tab contains several sections: 'Grace Periods' with 'Revocation Grace Period' set to 28 and 'Age-based Grace Period' (days to the student's eighteenth birthday) with 'Probation' set to 30 and 'Revocation' set to 14; 'Issue Probation Letters To...' with radio buttons for Parent, Employer, Neither, and Both (selected); 'Issue Revocation Letters To...' with radio buttons for Parent, Employer, Neither, and Both (selected); 'Probation Period Updating' with radio buttons for Review Date Only, Start and Review Dates, and Do Not Allow Updating (selected); 'Probation Term (days)' with '30' set for 'Min.' and '0' set for 'Fixed'; and a checkbox for 'Re-Issue Probation Letters' which is unchecked.

Note: Each of the business rule options are discussed below. The actual values shown for selected options (i.e. Age-based Grace Periods, Probation Term) may be edited based on your individual preferences. Before changing these values, be sure to read the descriptions of the options to understand how the changes that you make will affect the performance of your permit management schema. The "Revocation Grace Period" option will be disabled for this model schema.

Business Rule Options:

- **Revocation Grace Period**
This rule establishes a variable cut-off date that is based on a minimum number of days that a permit must have been issued before the end of the prior probation period. It's purpose is to enable districts to invoke a management schema that allows students a longer period of time to adjust to a new work setting before being subject to qualification-based permit revocation. The cut-off date is used to determine whether a permit should be excluded from being revoked (i.e. permits issued on or after the cut-off date will not be subject to revocation). Because this rule is based strictly on the issue date (irrespective of the date placed on probation), it should only be used in conjunction with another probation-based rule. This rule can be disabled on the 'Advanced Options' tab of the PERMIT MANAGEMENT form.

This option will be disabled for this model schema.

- **Age-based Grace Period - Probation**
This rule determines whether a permit should be excluded from being placed on probation based on a preset number of days until a student's 18th birthday (it's mostly a matter of practicality). For example, placing a student (that will turn 18 in 20 days) on probation for 45 days has no real purpose, as the student will no longer need a work permit by the time the probation review period is reached. To disable this option, deselect its check box.
- **Age-based Grace Period - Revocation**
This rule determines whether a permit should be excluded from being revoked based on a preset number of days until a student's 18th birthday (it's mostly a matter of practicality). For example, revoking a permit for a student that will turn 18 in 2 days will not serve any material purpose -- other than to force a two-day unpaid vacation -- until the student no longer needs a work permit. To disable this rule, deselect its check box.
- **Issue Probation Letters To . . .**
This rule determines which (if any) probation notification letters will be printed automatically when a permit is placed on probation.
- **Issue Revocation Letters To . . .**
This rule determines which (if any) revocation notification letters will be printed automatically when a permit is revoked.

- **Probation Period Updating**

Note: In order for this rule to be invoked, one of the following three items must occur:

- *A custom methodology for setting letter flags is utilized.*
- *"Letter Flags" controls are manually overridden.*
- *The "Re-Issue Probation Letters" rule is selected.*

This is because the standard "Business Rules" automatically excludes permits that are already on probation from having any change made to its probationary status -- rendering the rule (in this case) ineffectual. So ...for most users, you can stop reading here.

This rule determines when and if overwriting a probation date can occur when an automated process is used to place a permit on probation. If overwriting a date is allowed, the date entered will be determined by the selection made for setting the "Probation Term".

The following "Probation Period Updating" options are available:

Review Date Only

The review date will always be reset but the start date will only be entered if no previous date had been entered.

Start and Review Date

Both the start and review dates will always be reset.

Do Not Allow Updating

Overwriting either date will not be allowed. However, if either of the date fields are empty, a new date will be set.

- **Probation Term (days)**
Set on the 'Business Rules' tab of the 'Permit Management' form. The beginning probation date always defaults to the current date. This setting establishes the review date for the probation period at the time a permit is placed on probation. Depending on the settings for 'Probation Period Updating', both the beginning and probation review dates may be reset (overwritten) if a permit has been previously placed on probation and is subsequently placed on probation again in another probation period. In setting the value for the 'Probation Term' review date, only one of the following options may be used.

Minimum Term

The minimum term method calculates and sets the probation review date based on the following:

- Sets the review date to the end of the current period (if the remaining days in the current period is equal to or greater than the pre-established minimum probation period).
- Sets the review date to the end of the subsequent period (if the remaining days in the current period is less than the pre-established minimum probation period).

When utilizing the minimum term method probation review dates will always fall at the end of a probation period (and also the end of a grade report period when they are synchronized), this option is generally preferred when using a performance-based automated permit management schema.

Fixed Term

The fixed term method calculates and sets the probation review date by adding a fixed number of days (defined by the business rules) to the probation start date. This method will result in a constant duration of probation periods but the probation review dates will vary, causing performance to be evaluated in mid-term - before new grades are available. Utilizing the fixed term method would generally require use of a custom methodology for setting letter flags.

- **Re-Issue Probation Letters**

Note: This rule should be very carefully considered before it is included in a permit management schema. Its principle purpose is to allow users greater control when developing a custom schema - specifically one that employs fixed-duration probation review periods.

This rule has the effect of allowing permits to be placed on probation and letters issued to parents and employers even when the permit is already set as probationary and letters have already been issued. Because of the potential for the unintentional duplication of probation notification letters, users are cautioned when invoking its use.

Step 4

Select the "Advanced Options" tab.

General	Filter	Letters	Probation History	Business Rules	Advanced Options	Permit Notes
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Step 5

Set the "Advanced Options" as shown below:

General	Filter	Letters	Probation History	Business Rules	Advanced Options	Permit Notes
The settings on this page establish the revocation Business Rules policy to revoke permits where all of the selected elements are true.						
Elements of revocation Business Rules that may be enabled or disabled.				Elements of revocation Business Rules that may not be disabled.		
<input checked="" type="checkbox"/> Not Qualified by GPA, Attendance, and Number of 'F' Grades. *				<input checked="" type="checkbox"/> Permit is Currently On Probation		
<input checked="" type="checkbox"/> Permit is Not Cancelled				<input checked="" type="checkbox"/> Permit has Not Expired		
<input type="checkbox"/> Permit Was On Probation in the Prior Probation Period				<input checked="" type="checkbox"/> Permit has Not Been Revoked		
<input type="checkbox"/> Permit Issued Prior to Revocation Grace Date of . . . Currently: 12/18/03				<input checked="" type="checkbox"/> Subject to Age-based Grace Period		
<input type="checkbox"/> Number of Days Past Probation Start Date is at Least . . . 30 Days				* Also applies to probation Business Rules policy.		
<input checked="" type="checkbox"/> Number of Days Past Probation Review Date is at Least . . . 5 Days						

Note: Each of the "Advanced Options" are discussed below. For this model management schema, be sure to set the options exactly as shown.

Advanced Options:

These settings are used to establish a rule for when a work permit will be revoked by the automated permit management schema. Here, it is best to keep it simple. Invoking all of the rules can overly complicate the process. Keep in mind that for a permit to be revoked; all of the selected rules in the left-hand column must be true in addition to the four unchangeable rules in the right-hand column (see above).

- **Not Qualified by GPA, Attendance, and Number of "F" Grades**
This rule actually does the exact same thing as enabling "Probation Validation" in the DEFAULTS form. It only allows revocation for students who do not meet the defined permit qualification criteria.
- **Permit is Not Cancelled**
This rule prevents revoking permits that have been previously cancelled.
- **Permit Was On Probation in the Prior Probation Period**
By default, a permit must be currently on probation for it to be revoked. QuickPermit™ keeps track of a permit's probation status by probation period. This rule requires that in addition to being currently probationary, the permit was on probation in the prior probation period.

- **Permit Issued Prior to Revocation Grace Date of . . .**
Although this rule can be enabled/disabled here it is actually set on the "Business Rules" tab by the value entered for "Revocation Grace Period". The rule establishes a variable cut-off date that is based on a minimum number of days that a permit must have been issued before the end of the prior probation period. It's purpose is to enable districts to invoke a management schema that allows students a longer period of time to adjust to a new work setting before being subject to qualification-based permit revocation. The cut-off date is used to determine whether a permit should be excluded from being revoked (i.e. permits issued on or after the cut-off date will not be subject to revocation). Because this rule is based strictly on the issue date (irrespective of the date placed on probation), it should only be used in conjunction with another probation-based rule.
- **Number of Days Past Probation Start Date is at Least . . .**
This rule establishes a minimum number of days that a permit must be on probation before it can be revoked. To invoke this rule you must enter the number of days that defines the minimum probation period in the field to the right of the rule's text.
- **Number of Days Past Probation Review Date is at Least . . .**
This rule establishes a buffer period beyond the permit's review date where a permit cannot be revoked. It serves to allow time for processing grades, updating the Excel spreadsheet, and importing the new data into QuickPermit™. To invoke this rule you must enter the number of days that defines the buffer period in the field to the right of the rule's text.

The Following Four Rules Cannot be Disabled:

- **Permit is Currently On Probation**
Prevents automatic revocation of permits that are not on probation.
- **Permit has Not Expired**
Prevents automatic revocation of permits that have already expired.
- **Permit has Not Been Revoked**
Prevents automatic revocation of permits that have already been revoked.
- **Subject to Age-based Grace Period**
Although this can't be disabled on the "Advanced Options" tab, you can disable the age-based revocation grace period on the "Business Rules" tab of the PERMIT MANAGEMENT form (it's mostly a matter of practicality). For example, revoking a permit for a student that will turn 18 in 2 days will not serve any material purpose -- other than to force a two-day unpaid vacation -- until the student no longer needs a work permit.

Step 6**Defining the Permit Management Schema**

As previously mentioned, it is advisable that an accurate written description of the permit management schema is incorporated into District Policy. For use as an example, a description of the standard Schema is provided below.

Sample Policy Statement:

District policy requires a minimum level of academic and attendance standards to obtain and maintain a work permit. Students applying for their first work permit may be issued a probationary work permit if their performance is currently below the minimum qualification standards. Probationary permits are subject to immediate revocation if the student does not meet the qualification standards at the end of the probationary period.

Qualification Standards:

- Minimum Grade Point Average: 2.0
- Maximum Period Absences: 36
- Maximum Number of "F" Grades: 0

Students must meet all three standards to qualify for a work permit.

All probation periods will terminate at the end of a grade report period. Probation periods will be assigned in a manner that will provide for a minimum duration of 30 days -- to provide students with sufficient time to attain the qualification standards. In those circumstances where less than 30 days remain in the current grade report period the probation termination date assigned will be the end of the subsequent grade report period.

At the end of each grade report period qualification standards will be verified for all students that have been issued a work permit. The following actions will be taken based on the student's qualification and permit probation status. Parents/guardians and employers will be notified by letter anytime a work permit is placed on probation, reinstated, or revoked.

PERMIT PROBATION STATUS	QUALIFICATION STATUS	
	QUALIFIED	UNQUALIFIED
ON PROBATION (After End of Probation Period)	REINSTATE PERMIT	REVOKE PERMIT *
ON PROBATION (Before End of Probation Period)	REINSTATE PERMIT	NO CHANGE
NOT ON PROBATION	NO CHANGE	PLACE PERMIT ** ON PROBATION

* Unless within 14 days of student's 18th birthday. ** Unless within 30 days of student's 18th birthday.

Implementing the Permit Management Schema

Step 1

Issuing Work Permits

Issue work permits in the usual manner. QuickPermit™ will automatically verify the student's qualification status before a permit is printed. If a student is not qualified, you will be notified by a message prompt and given the opportunity to either cancel or to continue with the issuance of a probationary permit. When a probationary permit is issued the word "Probationary" will be printed on the face of the permit and probation notification letters will be printed for both the employer and the parent/guardian. Additionally, the permit's probation status, probation start date, and probation review date will be automatically set per the rules that have been pre-established and defined above.

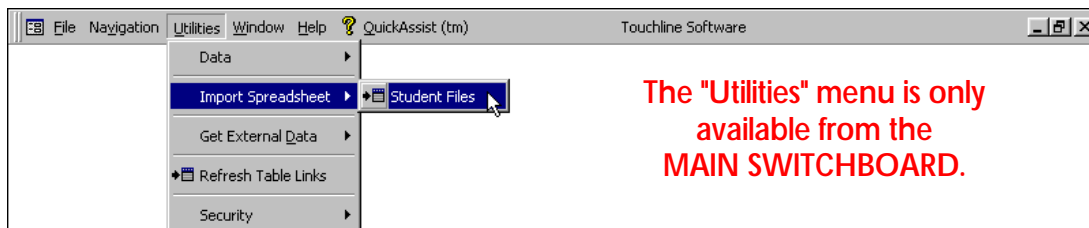
Note: The check boxes to the right of the "Print Permit" button ("Watch" and "Probation") are for the purpose of manually overriding the automated process described above. In addition, they can be used as part of a probation management schema where student performance criterion has not been imported.



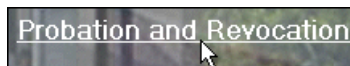
Step 2

End of Grade Period Processes

- After the new grades have been issued and recorded in your student management database and at least 5 days past the end of the end of the grade report period, export updated data to the Excel spreadsheet that is used by QuickPermit™ to access and import student data.
- Import the Updated Student Data



- Open the PERMIT MANAGEMENT form.

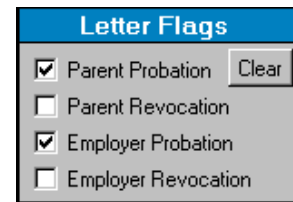


- Run the pre-established permit management schema for probation and revocation status changes.

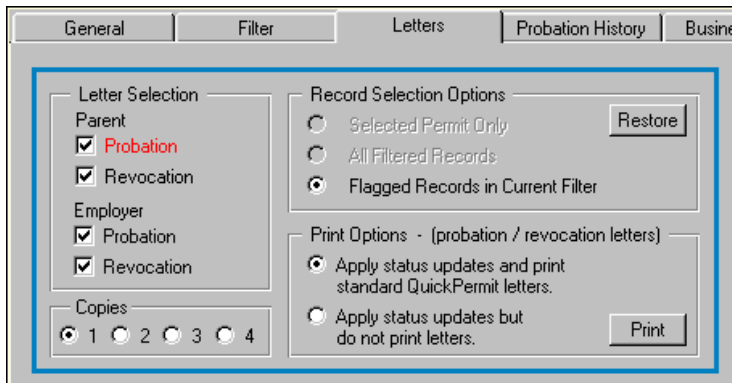


After selecting the "Set 'Business Rule' Flags" option, click the "OK" button to run the pre-established permit management schema.

Note: This process will select those permit records that are subject to either being placed on probation or revoked. The population of permit records in the PERMIT MANAGEMENT form will be filtered to only show those records that were selected. In addition, letter flags will be selected indicating the impending change in status as well as the specific letters that will be printed for each permit.



- At the completion of the automated process, you will receive a message dialog that states that the update is complete. This may take from just seconds to a few minutes depending on the size of your file and speed of your computer. Upon clicking the "OK" button in the "Update Complete" message dialog, the focus will automatically change from the "General" tab to the "Letters" tab. Additionally, all options inscribed in the blue rectangle (on the "Letters" tab) will be pre-selected.

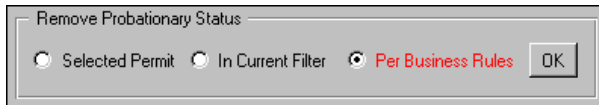


For the letters to be printed, make sure the first option button is selected in the "Print Options" section shown at left.

- Verify that your printer has enough paper, is turned on, and that your connection is active.
- Select the "Print" button to execute the updates for probation and revocation status changes and to print notification change letters. You will receive a series of message prompts alerting you to the updates and letters that will be issued, a printer test, and a final confirmation. Read the messages carefully and follow their prompts. After all the letters are printed a final report will be printed detailing all the status changes that were made.

Note: If your printer runs out of paper, don't cancel the print job -- just add more paper and continue printing.

- Select the "General" tab.
- Run the pre-established permit management schema for reinstatement status changes.



After selecting the "Per Business Rules" option, click the "OK" button to run the pre-established permit management schema.

- Upon running the above reinstatement process, permits (for qualified students) that are on probation will be reinstated and a reinstatement report will be printed detailing all of the changes. You will receive individual message prompts asking if you want reinstatement notification letters issued to parents and employers.