



# SchoolEngage



## PASI Writeback and Document Integration

April 30<sup>th</sup>, 2020

# Presentation Agenda

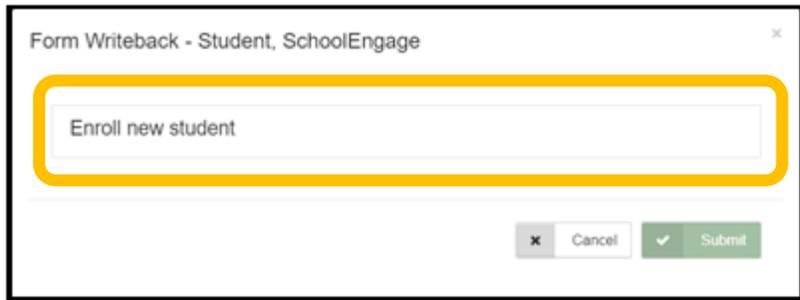
1. Writeback Overview
2. Reviewing PASI Writeback Data by Section
3. Adding vs Editing Records during Writeback
4. Document Integration with PASI
5. Questions and Feedback

# Writeback Overview – Basic Functionality

## What is Writeback?

- Writeback is the action of taking a set of data from SchoolEngage and moving it to another system (PowerSchool)
- Writeback should occur only after the form has been fully reviewed
  - Any “Office Fields” must be completed.
  - Documents should be reviewed.

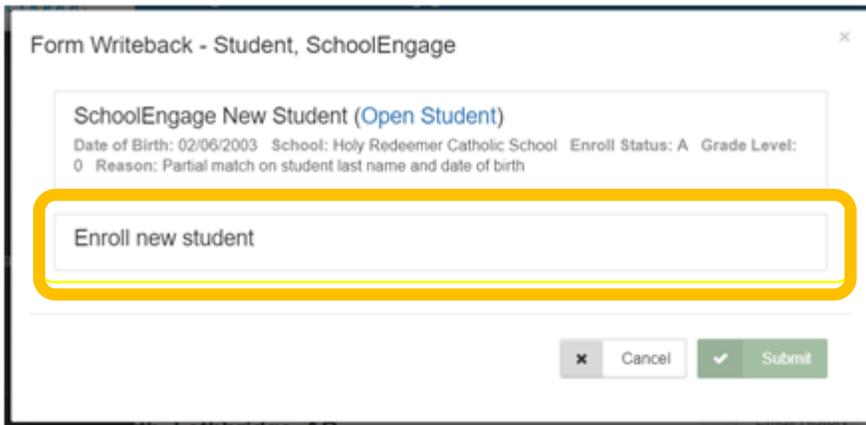
# Writeback Overview – Student Matching



Form Writeback - Student, SchoolEngage

Enroll new student

Cancel Submit



Form Writeback - Student, SchoolEngage

SchoolEngage New Student (Open Student)

Date of Birth: 02/06/2003 School: Holy Redeemer Catholic School Enrollment Status: A Grade Level: 0 Reason: Partial match on student last name and date of birth

Enroll new student

Cancel Submit

Only for Students who are not linked to PowerSchool.

Two Choices:

- Enroll new Student always appears
- If there is a match\*, that match can be selected. Clicking “Open Student” on a Match panel will open that student in PowerSchool

\*Matches are based on name, phenetic name, phone number, address

# Writeback Overview – Student Matching

Form Writeback - Student, SchoolEngage

**Warning: You have to change enrollment manually in PowerSchool after submitting.**

**SchoolEngage New Student ( )**  
Date of Birth: 02/06/2003 School: Holy Redeemer Catholic School Enroll Status: A Grade Level: 0 Reason: Partial match on student last name and date of birth

Enroll new student

Choose whichever option you'd like and it will highlight in blue, and then hit "Next".

Note the text in red when choosing to match with a student in PowerSchool – this is a PowerSchool restriction.

# Writeback Overview – Student Enrollment Information

Form Writeback - Student, SchoolEngage

School: Apple Grove High School

Grade Level: Grade 10

Term: 2019-2020

Entry Date: 03/06/2020

Exit Date: 07/25/2020

Status: Active

- Pre-Registered
- Transferred-Out
- Graduated
- Historical
- Inactive

If “Enroll new student” was chosen, an additional page for basic enrollment information appears\*.

Terms are pulled directly from PowerSchool. If a term you want is not appearing, it may not be set up yet.

\*Note: A common request we get is to have this page pull the data in from a form, this functionality is on the way.

# Writeback Overview – New vs Returning Students

## Existing SchoolEngage Writeback Steps

New Students (Accounts only in SchoolEngage)	Returning Students (Not Linked to PowerSchool)*	Returning Students (Students Linked to PowerSchool)*
Enroll New / Match Page	Enroll New / Match Page	No Action Needed
Enrollment Information		

\*Note: How are students linked to PowerSchool?

Option 1) They were added to PowerSchool, and were automatically synced to SchoolEngage overnight.

Option 2) They created an account in SchoolEngage, and a previous form was written to PowerSchool, creating their record.

Option 3) They created an account in SchoolEngage, and a match in PowerSchool was chosen during writeback.

# Writeback Overview – New vs Returning Students

## PASI SchoolEngage Writeback Steps

New Students (Accounts only in SchoolEngage)	Returning Students (Not Linked to PowerSchool)	Returning Students (Students Linked to PowerSchool)
Enroll New / Match Page	Enroll New / Match Page	PASI Actions
Enrollment Information	PASI Actions	Changes in PowerSchool
	Changes in PowerSchool	

# Writeback Overview – Final Notes

- Make sure to verify matches. Linking to the wrong student can lead to a lot of cleanup work
  - PowerSchool 20.4 has some features to help with this
- The keys to getting optimal writeback are:
  - Thorough form review
  - Utilize the Office Tab
  - Test the forms
  - Give feedback to your District SchoolEngage Admin

# PASI Review – How PowerSchool interacts with PASI

**Other Name**

Last , First , Middle, Suffix Adair , Brandon ,

Is Preferred?

+ ✎ -

**Identification Information**

Last, First, Middle, Suffix Adair \* Brandon \*

Is Exact?

Date of Birth 12/12/2002 \*

Document Type

Document Number (last 4 digits)

Issued Date MM/DD/YYYY

Is Preferred?

Student Document

+ ✎ -

**Gender**

Gender M - Male \*

+ ✎ -

 Please fix the following errors on this page:  
- All the fields in the preferred mailing address section (except expiry date) must either have a value or be blank.

PowerSchool interacts with PASI via the State Reporting Page

Changes are sent into a queue, where they are validated by PASI

PASI record is updated if validation passes

Any Core Alerts are sent back to PowerSchool

Several Basic Alerts are managed directly in the PowerSchool Interface

# PASI Review - PowerSchool

**Gender**

Gender  \*

Data is broken into relevant sections

**Preferred Mailing Address**

International Address?

Country

Street, Apt/Suite

City, Province, Postal Code

Effective Date

Expiry Date

Each section has 3 possible actions: Add, Edit, Delete

Not all actions are available on each section

# PASI Review – SchoolEngage Interface Overview

## Identification Information

Last, First, Middle, Suffix

Form Writeback - NEWT, NEWT (Open Student)

## Identification Information

The value submitted on this form, that will be moved to the SIS

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	1234	1234	1235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

Writeback Action

Edit the existing record in PowerSchool

Add a new record to PowerSchool

Ignore these fields and do not move to Powerschool

Every section on the PowerSchool State Reporting Page will have its own page added to the writeback process

Sections with no fields being written, or no changes in data are not shown

Sections will show all fields in that section that are mapped on the form.

This process only happens for students already enrolled in PowerSchool.

# PASI Review – SchoolEngage Interface Overview

Form Writeback - NEWT, NEWT (Open Student) ×

### Identification Information

FORM FIELD <sup>?</sup>	ORIGINAL FORM VALUE <sup>?</sup>	CURRENT SIS VALUE <sup>?</sup>	NEW FORM VALUE <sup>?</sup>
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	234	1234	1235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

**The value submitted on this form, that will be moved to the SIS**

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

- Writeback Action
- Edit the existing record in PowerSchool**
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

The first column shows the names of each question, as they appear on the form

Fields marked with (Office) are present on the Office Tab of the application, meaning they are filled out by Admin Assistants

# PASI Review – SchoolEngage Interface Overview

## Preferred Mailing Address

FORM FIELD ?	ORIGINAL FORM VALUE ?
Mailing City/Town	
Mailing Postal Code	
<b>Map Name: AB - MailingEffectiveDt, Field Id: s_ab_stu_x.mailingeffectivedt</b>	
Mailing Effective Date (Office)	

For users more involved in the form setup process, hovering over a field name will show you how it is mapped in SchoolEngage as well as what field in PowerSchool it is

# PASI Review – SchoolEngage Interface Overview

Form Writeback - NEWT, NEWT (Open Student)

### Identification Information

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	1234	1234	1235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

The value submitted on this form, that will be moved to the SIS

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

- Writeback Action
- Edit the existing record in PowerSchool**
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

The “Original Form Value” column shows what data was on the form when it was generated.

For forms such as a Demographics Update that pull from PowerSchool, this column will contain the data that was in PowerSchool at the time it was generated.

For a New Registration Form, this column will be blank as there was no starting data.

# PASI Review – SchoolEngage Interface Overview

Form Writeback - NEWT, NEWT (Open Student) ×

### Identification Information

FORM FIELD <span>?</span>	ORIGINAL FORM VALUE <span>?</span>	CURRENT SIS VALUE <span>?</span>	NEW FORM VALUE <span>?</span>
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	1234	1234	235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

**The value submitted on this form, that will be moved to the SIS**

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

- Writeback Action
- Edit the existing record in PowerSchool**
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

The “Current SIS Value” column shows what is in PowerSchool for this field right now.

This is pulled live, so it will always be accurate

# PASI Review – SchoolEngage Interface Overview

Form Writeback - NEWT, NEWT (Open Student)

### Identification Information

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	1234	1234	1235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

The value submitted on this form, that will be moved to the SIS

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

- Writeback Action
- Edit the existing record in PowerSchool**
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

The “New Form Value” column shows the final value that appeared on the form when it was approved

This is the value that will be in PowerSchool, after writing back.

# PASI Review – SchoolEngage Interface Overview

## Preferred Mailing Address

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Mailing Effective Date (Office)	10/22/2019	10/22/2019	11/01/2019
Mailing Expiry Date (Office)	10/31/2019	10/31/2019	
Mailing Address	123	123	14415
Mailing City	Calgary	Calgary	Edmonton
Mailing Postal Code	Y7Y 7Y7	<b>This field has been changed in the SIS since the form was generated</b>	T5Y 4U8
Mailing Province	BC	AB ⓘ	BC

## Identification Information

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT POWERSCHOOL VALUE ?	NEW FORM VALUE ?
Legal Last Name		Spirit	Student
Legal First Name		Holy	SchoolEngage
Legal Middle Name		John	New
Birthdate		02/06/2003	02/06/2003
Document Number (Office)		1234	1234
IsExact (Office)		yes (1)	yes (1)
Document Type (Office)		Alberta Adoption Order (ABAAdoption)	Alberta Adoption Order (ABAAdoption)

## Cell Coloring:

Yellow – indicates unique data. If one value is different than the others, it will be highlighted yellow for clarity

Red – Indicates that writing back may erase data, as the value changed in PowerSchool since generated (for Demographics forms)

Green – After an action is chosen, this data will be in PowerSchool after writing back

# PASI Review – Recommendations

Form Writeback - NEWT, NEWT (Open Student) ×

### Identification Information

The value submitted on this form, that will be moved to the SIS

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Document Issue Date (Office)	08/05/2019	08/05/2019	08/05/2019
Document Number (Office)	1234	1234	1235
Document Type (Office)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)	Canadian Citizenship Card (CACitzCard)
Name Is Exact (Office)	Y	Y	Y
Preferred Name Indicator (Office)	Alias	Alias	Alias
Legal First Name	LEGAL CORE	LEGAL CORE	LEGAL CORE
Legal Middle Name	Middleseon	Middleseon	Middleseon
Legal Last Name	LAST Y	LAST Y	LAST Y
Legal Suffix	XVIII	XVIII	XVIII

> Recommended Action: [Edit](#)

Only one mapped field in this section has a data change, so this is likely to be a correction or formatting change. Please review the data to ensure this is the case.

Writeback Action

- Edit the existing record in PowerSchool
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

At the bottom of each page, there is a section for “Recommended Action”

Our system tries to predict the action needed based on what has changed

This is meant to streamline writeback, but should not replace reviewing the data

# PASI Review – Recommendations

## ▼ Recommended Action: Edit

 **Edit** Use this action when the changes to the data reflect a correction or clarification to an existing record. This data will replace the existing record.

 **Add** Use this action when the changes will become the next active data record. The previous record will gain an expiry data and made inactive, but will not be removed.

 **Ignore** Use this action when the data above has no changes or should not currently be moved over. If the 'New Form Value' data above is incorrect, or changes have occurred in PowerSchool since the form was generated, please Cancel writeback and correct the data on the form.

 **Investigate** If Investigate is recommended, it means that our system was not able to clearly determine the action required, and that further manual review should be done before continuing.

 **Cancel** If Cancel is recommended, it means that there may be changes required on the form before writing back and further research should be done.

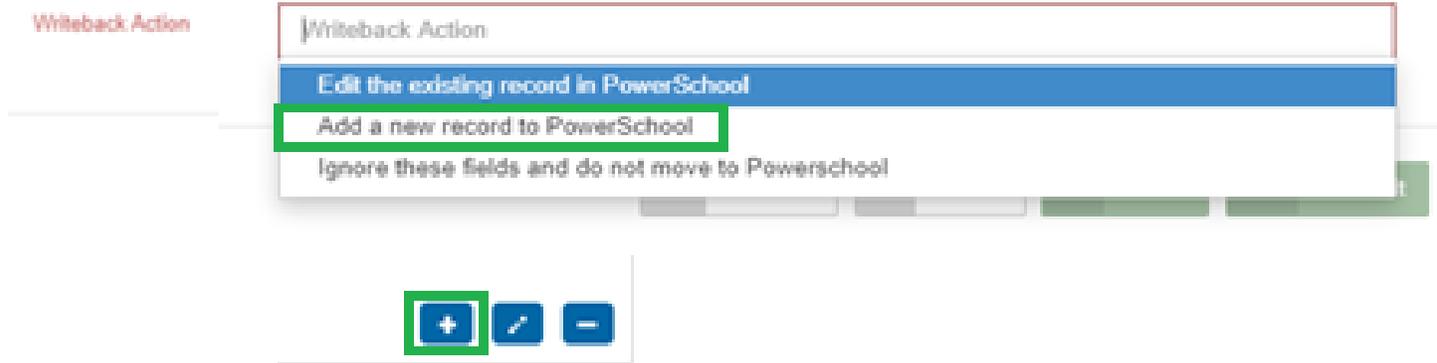
# Choosing an Action - Overview

In School Engage, we allow 2 or 3 actions on each section (depending on PowerSchool Rules)

All Sections have Add, Edit and Delete, with the exception of:

Gender, Primary Language, Identification Information do not allow Add

# Choosing an Action - Add



## Preferred Mailing Address

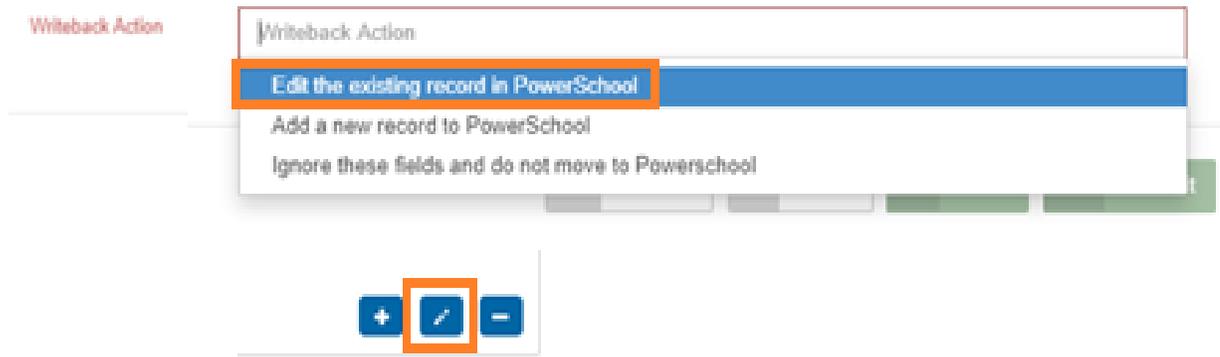
FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT POWERSCHOOL VALUE ?	NEW FORM VALUE ?
Mailing City/Town		Edmonton	Edmonton
Mailing Postal Code		T6T 6T7	T5H 0T0
Province		Alberta (AB)	Alberta (AB)
Mailing Effective Date (Office)		02/05/2020	09/03/2020
Mailing Address		Canada	Canada

“Add” is the same as the Plus icon in PowerSchool

This will update the current fields on the State Reporting page, but when it is processed by PASI, it will expire the previous record and add the new form values as a new entry.

This should be used for changes in the information of a student, such as move, a new phone or a legal name change.

# Choosing an Action - Edit



## Preferred Mailing Address

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT POWERSCHOOL VALUE ?	NEW FORM VALUE ?
Mailing City/Town		Edmonton	Edmonton
Mailing Postal Code		T6T 6T7	T5H 0T0
Province		Alberta (AB)	Alberta (AB)
Mailing Effective Date (Office)		02/05/2020	09/03/2020
Mailing Address		Canada	Canada

“Edit” is the same as the Pencil Icon in PowerSchool

This will reflect any new changes on the State Reporting page and modify the current PASI entry, but leave everything that is the same.

This should be used for corrections in the information of a student, such as typo or genuine error.

# Choosing an Action - Ignore

Writeback Action

Writeback Action

- Edit the existing record in PowerSchool
- Add a new record to PowerSchool
- Ignore these fields and do not move to Powerschool

“Ignore” can be used to ignore the changes on a form and keep what was entered in a section.

## Preferred Mailing Address

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT POWERSCHOOL VALUE ?	NEW FORM VALUE ?
Mailing City/Town		Edmonton	Edmonton
Mailing Postal Code		T6T 6T7	T5H 0T0
Province		Alberta (AB)	Alberta (AB)
Mailing Effective Date (Office)		02/05/2020	09/03/2020
Mailing Address		Canada	Canada

This is for an situation where a form has introduced errors, and they were not caught during review.

# Choosing an Action - Cancel

Several fields in this section have been changed. This usually indicates a new record, but please review the information to be sure of this.

Writeback Action

Ignore these fields and do not move to Powerschool



Sometimes if there are errors in the data, whether it be something missed in review or something that has changed in PowerSchool that you need to look into.

# Choosing an Action– Tips

- If every field in a section has changed, this usually indicates a major change and should be added
- Check “key” fields in each section for changes. Even if they’re the only field changed, it can indicate a new record. For example:
  - If Phone Number changes more than one digit, it is likely a new Number, so “Add”
  - If Phone Effective Date changes but not number, then it is likely an update, and so it should be “Edit”

# Changes in PowerSchool

## Changes in PowerSchool Since Form Creation

FORM FIELD ?	ORIGINAL FORM VALUE ?	CURRENT SIS VALUE ?	NEW FORM VALUE ?
Preferred Last Name	Johnson	McDichael ⓘ	Johnson
Permanent Province	BC	AB ⓘ	BC
Student First Name	Brandon	NEWT ⓘ	Brandon
Student Last Name	Johnson	NEWT ⓘ	Johnson
Physical Province	BC	AB ⓘ	BC
Mailing Province	BC	AB ⓘ	BC

The above fields have all changed in PowerSchool since the form was created, and would be overridden on a writeback. Please review these carefully, and cancel writeback to make any changes to the form if necessary.

Parent Show All Show Changes

STEPS: 1 2 3 4 5 6 7 8 9 10 11 12 13

After choosing all PASI actions, and additional page is shown that contains a list of any fields being written back that have changed in PowerSchool since the form was generated – including custom extensions

This step can also be taken before Approval by clicking “Show Changes”. If you cannot see this tab, please talk to your District SchoolEngage Admin and we can help them set this up for your district.

# Changes in PowerSchool

Form Writeback - Test, Tester

## Error

Errors during process:

Errors in "AB PowerSchool Writeback ver.2" data source:

AB State - All the fields in the preferred mailing address section (except expiry date) must either have a value or be blank.



Please fix the following errors on this page:

- All the fields in the preferred mailing address section (except expiry date) must either have a value or be blank.

PowerSchool has many different rules that are validated in the interface. We have ported all of them over to SchoolEngage to make sure that data written back is correct.

# Document Integration- Overview

▼ Review
Files
Settings
Application History
Email History
Student
Send Email
PASI Upload
▼ Form Status
Reset
Writeback
▼ PowerSchool
Open Student
Open Student AB/State Page

In SchoolEngage, Guardians are required to upload an assortment of documents including citizenship documents, custody documents and proof of address. In addition to that, SchoolEngage automatically generates PDFs of each form upon approval.

# Document Integration- Managing Files

The screenshot displays the '2020-2021 Grades K-12 Registration Form' page for a 'SchoolEngage Student'. It features two document management sections:

- PASI Documents:** A dark header bar with the text 'PASI Documents' and window control icons. Below it, a light blue box contains the message 'No PASI documents yet.'
- Application Documents:** A dark header bar with the text 'Application Documents', a blue circle containing the number '1', and window control icons. Below it, a document entry is shown: '2020-2021 Grades K-12 Registration Form.pdf' with a 'READY TO BE UPLOADED' status, the label 'Registration Form', and a 'Lock' button.

The main file window shows files currently in PASI and files yet to be uploaded

\* Development Screenshots are subject to change prior to release

# Document Integration- File Data

The screenshot displays the 'Application Documents' interface. At the top, a document titled '2020-2021 Grades K-12 Registration Form.pdf' is shown with a 'NOT UPLOADED' status. The interface is divided into two main sections: 'Student Document Information' and 'Document Preview'.

**Student Document Information:**

- Category Type:** A dropdown menu currently showing 'Category Type'.
- Document Title:** A text input field containing 'Document Title'.
- Relevant?:** A dropdown menu set to 'No'.
- Document Language:** A dropdown menu set to 'Document Language'.
- Document Digitized?:** A dropdown menu set to 'No'.
- Document Date:** A date picker field showing 'Document Date'.
- Document Expiry Date:** A date picker field showing 'Document Expiry Date'.
- Student Document Image Information:**
  - Text Searchable?:** A dropdown menu set to 'No'.

A green button labeled 'Push to PASI' is located at the bottom center of the metadata section.

**Document Preview:**

The preview window shows a document titled '2020-2021 Grades K-12 Registration Form' for 'SchoolEngage Student'. The form was created on 2020-02-05 at 1:36:09 PM. It contains a table with the following data:

Field Name	Value
SchoolEngage Student	
620 128 Street North, Lethbridge, AB	
Tel: 403-327-9555 Fax: 403-327-9558#65279	
<b>Student Information</b>	
Legal Last Name	Student
Legal First Name	SchoolEngage
Legal Middle Name	New
Preferred Last Name	Spirits
Preferred Given Name(s)	Holly
Birthdate	02/09/2003
Gender	Male
Phone Number	780-000-0000
Phone Type	Home Phone
<b>Mailing Address</b>	
Apt/ Suite	417
Mailing House	880
Mailing Address	80th Street NW

Clicking on a file allows you to expand the data to view any previously entered metadata, as well as seeing a preview of the file itself without having to download and open it.

# Document Integration- Metadata

## Student Document Information

Category Type Category Type ▾		
Document Title ASN 123456789 - Registration Form 2020		
Relevant? Yes ▾	Document Language English	Document Digitized? Yes ▾
Document Date 04/29/2020 📅	Document Expiry Date 04/12/2023 📅	

## Student Document Image Information

Text Searchable? Yes ▾
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Before sending files to PASI, you can enter any missing metadata so that the file is already fully correct when it arrives in PASI.

# Document Integration – Final Notes

The screenshot displays the 'Application Documents' interface. At the top, a dark header shows 'Application Documents' and a document count of '1'. Below this, a breadcrumb trail indicates 'NOT UPLOADED' and '2020-2021 Grades K-12 Registration Form.pdf'. On the right, there are 'Registration Form' and 'Lock' buttons.

The main area is divided into two sections:

- Student Document Information:** Contains several dropdown menus and date pickers:
  - Category Type: Category Type
  - Document Title: Document Title
  - Relevant?: No
  - Document Language: Document Language
  - Document Digitized?: No
  - Document Date: Document Date
  - Document Expiry Date: Document Expiry Date
- Student Document Image Information:** Contains one dropdown menu:
  - Text Searchable?: No

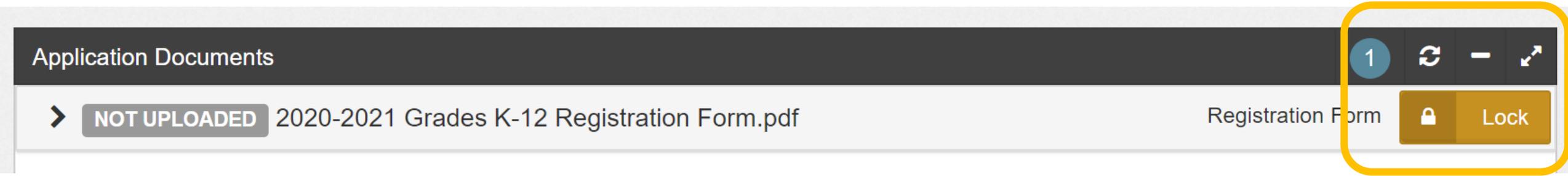
At the bottom center, a green button with a cloud icon and the text 'Push to PASI' is highlighted with a yellow rounded rectangle.

**Document Preview:** Shows a preview of the '2020-2021 Grades K-12 Registration Form' for a 'SchoolEngage Student'. The form was created on 2020-02-05 at 1:36:09 PM. It includes a table with the following data:

Field Name	Value
6495279 HOLY SPIRIT ROMAN CATHOLIC SEPARATE SCHOOL DIVISION 620 128 Street North, Lethbridge, AB Tel: 403-327-9555 Fax: 403-327-9595#65279	
<b>Student Information</b>	
Legal Last Name	Student
Legal First Name	SchoolEngage
Legal Middle Name	New
Preferred Last Name	Sprints
Preferred Given Name(s)	Holly
Birthdate	02/05/2003
Gender	Male
Phone Number	780-550-0000
Phone Type	Home Phone
<b>Mailing Address</b>	
Appt Suite	417
Mailing House	889
Mailing Address	50th Street NW

Whenever the file is ready to go, simply press “Push to PASI”

# Document Integration – Final Notes



If you have some other files that are only for reference and don't need to go to PASI, you can press "Lock" to store them locally as they are. A locked file cannot be modified or uploaded to PASI.

You can always unlock them in the future if you need.

# Questions and Feedback?





# SchoolEngage

## Thank You!

Feedback and Suggestions:  
[info@intellimedia.ca](mailto:info@intellimedia.ca)

