

**ON BASE  
ELECTRONIC  
CUMULATIVE FILE  
INSTRUCTIONS  
FOR  
SECRETARIES/REGISTRARS**

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# Scanning Cumulative Documents for Students

## with an Infinite Campus ID

**The Express Scanning Process for Students with an Infinite Campus Student ID. You may need to look up the student under All People in Infinite Campus to retrieve the student ID.**

The Cumulative File scanning process begins by opening “Express Scanning” by clicking on the ICON on your desktop.

After opening Express Scanning you will be presented with a simple user interface as shown on the next page. Scanning is initiated by selecting the appropriate document type scan button. There are eleven buttons available. The first 7 buttons (B–Birth Certificate, L–Legal Documents, T–Transcript/Perm Card, G–Temp Guardian, O–Out Of District, V–Variance and P–Permissions/ Refusals) are for documents where the **student has an Infinite Campus (IC) Student ID**. The last 4 buttons (B–Birth Certificate-No Stu#, Legal Documents-No Stu#, T-Transcript/PermCard-No Stu# and G–Temp Guardian-No Stu#) are for documents where the student doesn’t have an IC Student ID yet.

B – Birth Certificate: Includes Birth Certificates or the Parent Refusal to Allow Suitable Proof form.

L-Legal Documents: Includes documents that have been have been filed with a county, state, or federal court or power of attorney.

T-Transcripts/PermCards: Only transcripts, perm cards or any permanent record or official transcript from another school, does not include report cards.

G-Temp Guardians: Includes all active temporary guardianship forms.

Out-of-Districts: Any cumulative file elements that have come from another district and are not in IC. E.g. out-of-state/district testing.

V-Variance: Includes WCSD in-district and out-of-district variances

P-Permissions/Refusals: Includes permission or refusals signed by parent/s guardians, does not include out-of-district permissions/refusals. E.g. field trip permission slips.

INSTRUCTIONS:

1. Choose the appropriate button type.
  
2. After clicking on the button, you will be asked to select or enter information.
  - a. All bullets will ask you to select your school and then enter the student ID.

b. You will select or enter additional information for the buttons listed below:

- Transcripts/PermCards you will be asked to select the Transcript Type; ES, HS, MS, Out-of-District, Perm Card.
- Temporary Guardianship you will be asked to enter an expiration date.
- Variances you will be asked to select a variance type.

- Permissions/Refusals you will be asked to select the permission type.
3. You will have 3 scan format options. Choose the Color option.
  4. After scanning the last step of the process is to review the document to make sure all information is legible and the document is straight and not crooked before uploading into OnBase. As shown in the next picture you can scan/add more pages to your document or delete it and start over if necessary.

After clicking the upload button, you will be returned to the main Express Scanning window where you can scan additional document types or close Express Scanning.

# Scanning Birth Certificates for Students

## without an Infinite Campus ID

**The Express Scanning Process for Students without an Infinite Campus Student ID. These are new students to the district who have never been enrolled in WCSD (including WCSD sponsored charter schools).**

The Cumulative File scanning process begins by opening “Express Scanning” by clicking on the ICON on your desktop.

After opening Express Scanning you will be presented with a simple user interface as shown on the next page. Scanning is initiated by selecting the appropriate document type scan button. There are eleven buttons available. The first 7 buttons (B–Birth Certificate, L–Legal Documents, T–Transcript/PermCard, G–Temp Guardian, O–Out Of District, V–Variance and P–Permissions/ Refusals) are documents where the student has an IC Student ID. The last 4 buttons (B – Birth Certificate-No Stu#, Legal Documents-NO Stu#, T-Transcript/PermCard-No Stu# and G – Temp Guardian-No Stu#) are for documents where **the student doesn’t have an IC Student ID** yet.

B – Birth Certificate: Includes Birth Certificates or the Parent Refusal to Allow Suitable Proof form.

L-Legal Documents: Includes documents that have been have been filed with a county, state, or federal court.

T-Transcripts/PermCards: Only transcripts, perm cards or any permanent record or official transcripts from another school, does not include report cards.

G-Temp Guardians: Includes all active temporary guardianship forms.



INSTRUCTIONS:

1. Choose the appropriate button type.
  
2. After clicking on the button, you will be asked to select or enter information.
  - All Bullets will ask you to select your school, enter the student's last name, first name, middle name, and suffix.

The image shows a standard Windows-style dialog box. The title bar at the top is light blue and contains the text 'First Name'. Below the title bar, the main area is light gray and contains the text 'Enter Student First Name' centered. Underneath the text is a single-line text input field. At the bottom of the dialog box, there are two buttons: 'OK' on the left and 'Cancel' on the right.

- You will select or enter additional information for the buttons listed below:
  - i. Transcripts/PermCards you will be asked to select the Transcript Type; ES, HS, MS, Out-of-District, Perm Card.


- ii. Temporary Guardianship you will be asked to enter an expiration date.
3. You will have 3 scan format options. Select the color option.
4. After scanning the last step of the process is to review the document to make sure all information is legible and the document itself is straight and not crooked before uploading into OnBase. As shown in the picture below you can scan/add more pages to your document or delete it and start over if necessary.

Invoices  
1 Page Document

Upload

Scan More Pages

Delete

  
**Office Supply Warehouse**  
8879 Blue Street  
Denver, CO 80602

## INVOICE


  
**Invoice No: 2440**  
**Date: April 7, 2008**

Bill To:  
9-Second Foods, Inc.  
19000 Quikky Circle  
Columbia, MO 65201

Ship To:  
Same

PO	Terms	Date Shipped	Shipped Via	Salesperson
990	2% 10, Net 30	4/7/08	UPS	Bob M.

Quantity	Description	Unit Price	Total
100	Box of Thumb Tacks - Quantity 100	5.00	500.00
30	Stapler, standard office black	7.00	73.00
40	Medium yellow sticky notes, package	6.00	240.00
<b>Shipping &amp; Handling</b>			\$0.00
<b>TOTAL</b>			\$810.00



After clicking the upload button, you will be returned to the main Express Scanning window where you can scan additional document types or close Express Scanning.

**Go to the Adding the Student ID to Documents instructions to complete the process.**

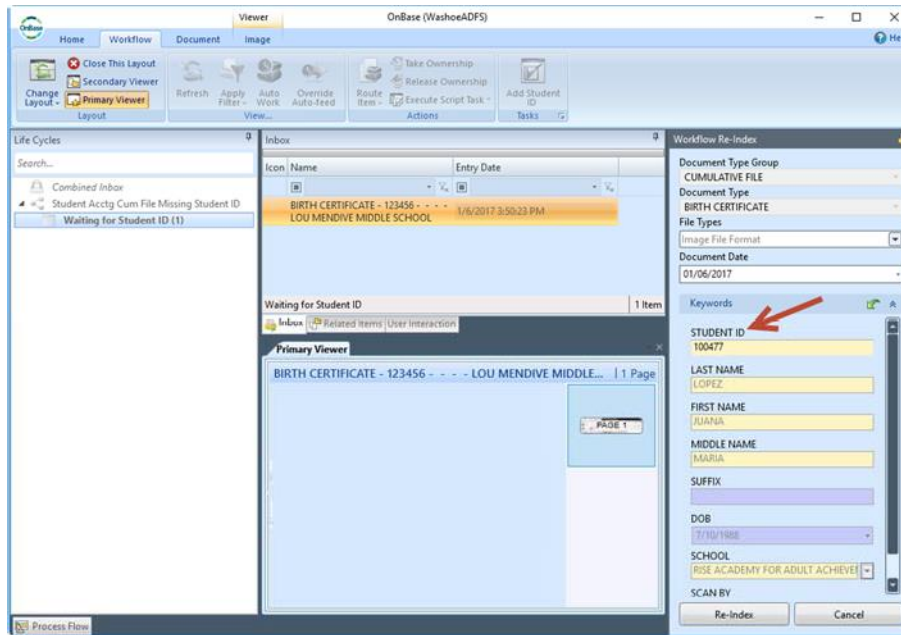
## **Adding the Student ID to your document\documents that were initially scanned in without one.**

Begin by opening “OnBase” by clicking on the ICON on your desktop.

Documents uploaded into OnBase without a Student ID or who do not have a valid Student ID are placed into Student Acctg File Missing Student ID Workflow where they will rest until a valid Student ID has been entered. There is a 24hr. window before OnBase receives the new Student ID from IC. This means that it can take up to 24 hours for the student to disappear from the workflow after adding or correcting the student ID.

1. After opening OnBase, select the workflow icon from the toolbar.
2. When the workflow opens, you will be able to see all the documents for your school that do not have a valid Student ID, either the student ID is missing or the student ID does not match with a student in IC. You will be able to see the student names so you can identify which document(s) need attention.

3. Start by clicking on one of the document's shown in your Inbox. The selected document will be displayed in the primary viewer window below your inbox
4. To add the Student ID click on the Add Student ID button on the toolbar
5. After clicking the button, you will see the Workflow Re-Index window open on the right side of the screen.
6. Enter the new or correct Student ID and press the tab key on your keyboard and you will see the additional fields are populated with data associated with the Student ID. To finish the process, click the Re-Index Button in the bottom right corner of the workflow window.



7. The system will check to make sure that the Student ID is valid before removing the document from workflow. If the ID entered is not valid you will be prompted to double check the Student ID or to contact your system administrator (the IT Help Desk at 789-3456) if the ID is valid and exists in IC.
  
8. Click the “ok” button and you will be returned to workflow where you can move on to the next document in the list. The document with the invalid ID will remain in this queue until the ID can be corrected.

# Retrieving Electronic Cumulative File Documents

1. Begin by opening “OnBase” by clicking on the ICON on your desktop.
2. Select the Retrieval icon from the toolbar.



3. Choose the appropriate document type you are searching for; All, Birth Certificate, Home Language Survey, Legal Documents, out of District Testing, Perm Card, Permissions/Refusals, STAC, Temp Guardian, Transcripts, or Variances.
4. You have several search options. You can input a date range for documents that were scanned between a certain time period. You can search by Student ID, Name or DOB. After you type in the search data then click on the Find button.



Keywords and Date Range

From  To

STUDENT ID =

LAST NAME =

FIRST NAME =

MIDDLE NAME =

SUFFIX =

Full-Text Search

Search Text:

Note Search

Find

5. Any documents with the search criteria you input will appear on the right.
6. Double click with the mouse on the document you are looking for.
7. At this time Student Accounting only has the rights to delete a record. If you need a record deleted, please email your contact below:

**High Schools, and K-12 Schools** - [Jeannine Bell](#), (775) 861-4430

**Middle Schools, and K-8 Schools** - [Debbie Annand](#), (775) 861-4442

**Elementary Schools** - [Sherry Sykes](#), (775) 861-4427

## **Transferring Scanned Cumulative Folders from School to School**

Follow the normal records transfer process if your school's cumulative folders have not been scanned into OnBase.

If your school's cumulative folders have been scanned into OnBase and the student is transferring to another school, please write "SCANNED" in large print across the front of the folder with a RED Marker or Marks-A-Lot prior to sending the folder to the new school. This will ensure the folder will not be scanned again.

Following the same paper cumulative folder process, you will check the cumulative folder. If receiving a cumulative folder with the word "Scanned" in Red Marker on the front of the folder, the enrolling school verifies that the information in OnBase is legible and the documents are straight and not off-kilter. In addition, each of the following items must be checked in OnBase:

1. BC – Check legal name, DOB, parent info in IC.
2. Legal Doc's – Current or outdated? Contact Student Accounting if you need a document deleted.
3. Variances - Current or outdated? Contact Student Accounting if you need a document deleted.
4. Transcripts- Verify that the previous school uploaded latest transcript.

Any cumulative folder with "Scanned" written on the front should not be sent to PDI if you are boxing up cumulative folders for scanning. Do not include "Scanned" folders in your boxes to PDI.