

# Student Education Organization Responsibility Associations (Arizona v3.6)

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Tool Search: Ed-FI

Relationship Associations are reported from the Enrollment and locked IEPs. This is to identify any relationships a student may have with an organization outside the enrollment.

## Object Triggering Logic

The tables below describe the logic for triggering syncing of this object. Expand one of the areas below to see full requirements:

| Action | Trigger  |
|--------|--|
| Post   | <p>Reports one record for the Primary SPED Services School with a student having a new IEP created and saved for a student and locked in a given scope year.</p> <ul style="list-style-type: none"> <li>When a student has multiple overlapping enrollments within the primary school, reports from the enrollment with a Local Service Type of P: Primary.</li> <li>When a student has multiple overlapping enrollments within the primary school, but no P: Primary enrollment, reports the T: AOI enrollment.</li> <li>When a student has multiple overlapping enrollments within the primary school, but no P: Primary or T: AOI enrollment, reports the most recent A: Ancillary enrollment.</li> <li>When a student has multiple overlapping enrollments within the primary school, but no P: Primary, T: AOI, or A: Ancillary enrollment, reports the most recent O: Program Only enrollment.</li> <li>When the Primary Services dropdown is not populated, reports from the enrollment that overlaps the IEP dates that has a IC Service Type of P: Primary.</li> <li>IEP start date must be on or after enrollment start date.</li> <li>A record is not sent for an enrollment that is marked as State Exclude or No Show.</li> <li>A record is not sent when enrollment is in a calendar marked as State Exclude.</li> <li>A record is not sent when the enrollment Start Status = E: NON-SAIS DISTRICT USE ONLY!</li> </ul> |
| Post   | <p>When a new enrollment is created for a student that has an existing IEP.</p> <ul style="list-style-type: none"> <li>The Enrollment start date must be after IEP start date.</li> <li>IEP end date must be NULL or after Enrollment start date.</li> <li>When the student has more than one IEP started in previous schools years, only the most recent IEP reports.</li> </ul>  |

| Action      | Trigger  |
|-------------|--|
| Delete/Post | <p>When a start date is entered or changed for an existing record.</p> <ul style="list-style-type: none"> <li>• When Responsibility was posted from IEP, updates when start date was changed.</li> <li>• When Responsibility was posted from Enrollment, updates when start date was changed.</li> </ul> |
| Put         | <p>When a end date is entered or changed for an existing record.</p> <ul style="list-style-type: none"> <li>• When Responsibility was posted from IEP, updates when start date was changed.</li> <li>• When Responsibility was posted from Enrollment, updates when start date was changed.</li> </ul>   |
| Delete/Post | When the Resident School changes on the enrollment.  |
| Delete/Post | <p>When reporting from an amendment, only post when one of the following editors are updated (Find this in the PlanAmendment table):</p> <ul style="list-style-type: none"> <li>• Education Plan</li> <li>• Placement</li> </ul>   |
| Delete/Post | When the student has two locked IEPs with the same start date and one record is deleted or unlocked, the remaining IEP posts.  |
| Delete/Post | When an enrollment end date is entered for a student with a valid enrollment end status: W1-W13.   |
| Delete/Post | When an Exit Evaluation is entered for a student, the end date of the active IEP is updated.   |
| Delete      | When an IEP is deleted for a student.  |
| Delete      | When a student's enrollment Start Status is changed from a valid code to E: NON-SAIS DISTRICT USE ONLY! and saved.   |
| Delete      | When an existing enrollment is marked as State Exclude or No Show.   |
| Delete      | When the IEP Start or End Dates OR the Enrollment Start or End Dates have been updated so the IEP and Enrollment no longer overlap, delete the record when one was created.  |
| Delete      | When a plan is unlocked.   |

## Scope Year

## Business Rules

When a new IEP is created, the record reports in the Scope Year that the IEP Start Date overlaps with.

- The start date must be on or before the School Year End Date. When School Year End Date is NULL, 6/30/XXXX is used as the default date.
- Data only sends for the years that have valid configuration.

When the record is triggered from enrollments, the record sends to the scope year for the school year the enrollment is associated with.

- Data only sends for the years that have valid configuration.

## Object Data Elements

Data Element Labels in bold are part of the Natural Key and are required data elements for Data to send to Ed-Fi. Expand one of the areas below to see full requirements:

| Data Element Label | Business Requirement and Logic  | Mandatory, Conditional or Optional | Location   |
|--------------------|---|------------------------------------|--|
| id                 | The unique identifier of the resource.  | M                                  |  |
| <b>beginDate</b>   | <p>The date the educational organization was responsible for the student.</p> <ol style="list-style-type: none"> <li>1. Reports the start date from the IEP when: <ul style="list-style-type: none"> <li>◦ IEP Start Date is after enrollment Start Date.</li> <li>◦ Enrollment End Date must be NULL or after IEP start date.</li> </ul> </li> <li>2. Reports the Enrollment Start Date when: <ul style="list-style-type: none"> <li>◦ Enrollment Start Date is after the IEP Start Date.</li> <li>◦ IEP End Date is after the Enrollment Start Date.</li> </ul> </li> </ol> <p>Notes:</p> | M                                  | <p>AZ locked Plan &gt; Education Plan &gt; IEP Start Date</p> <p>Plan.startDate</p> <p>Student Information &gt; General &gt; Enrollments &gt; Start Date</p> <p>enrollment.startdate</p> |

| Data Element Label              | Business Requirement and Logic   | Mandatory, Conditional or Optional | Location |
|---------------------------------|--|------------------------------------|----------|
|                                 | <p>1. When there are enrollments with an end status of ZZZ and a subsequent enrollment with a start status of ZZZ, the enrollments are combined and the earliest start date reports (where the start status is NOT ZZZ) for the enrollment start date.</p> <ul style="list-style-type: none"> <li>◦ The enrollments must be in the same school, grade, and local service type. Also, the enrollment start date must be the next instructional day after the ZZZ end status, or be before or equal to the ZZZ end status.</li> </ul> <p>2. Use the enrollment that is tied to the primary services school when populated, otherwise use the enrollment that has an IC Service Type of P: Primary.</p> |                                    |          |
| <b>responsibilityDescriptor</b> | <p>Indication of an education organization's responsibility for a student.</p> <p>Always reports 'IEP'.</p>  |                                    |          |

| Data Element Label                    | Business Requirement and Logic   | Mandatory, Conditional or Optional | Location   |
|---------------------------------------|--|------------------------------------|--|
| <b>EducationOrganizationReference</b> | <p>A reference to the related EducationOrganization resource.</p> <ol style="list-style-type: none"> <li>1. When the Resident School field is populated on the Enrollment, reports the School Entity ID from the school selected. This is primarily for Tuition Out students where the record reports under <i>the school the student would otherwise be in if they were not being tuitioned out.</i></li> <li>2. When the Primary SPED Services School is populated or the SPED Services School is populated with a SPED Concurrency Type of Primary on the locked IEP, reports the School Entity ID from the school selected.</li> <li>3. Reports the School Entity ID.</li> </ol> | M                                  | <p>Z locked Plan &gt; Enrollment Status &gt; Primary SPED Services School</p> <p>AZ locked Plan &gt; Placement &gt; SPED Concurrency Type</p> <p>AZ locked Plan &gt; Placement &gt; SPED Services School</p> <p>Student Information &gt; General &gt; Enrollments &gt; Resident School</p> <p>System Administration&gt; Resources &gt; School editor &gt; Entity ID</p> <p>School.entityID</p> |
| <b>studentReference</b>               | <p>A reference to the related Student resource.</p> <p>Reports the student reference.</p> <p>The Ed-Fi ID reports from the Student State ID field.</p>   | M                                  |  |
| endDate                               | The month, day and year on which the student exited the program or stopped receiving services.   | C                                  | AZ locked Evaluation>Exit Evaluation> Exit Date  |

| Data Element Label | Business Requirement<br>1. When Enrollment End Date is NOT null:<br>and Logic<br>◦ Reports the   | Mandatory,<br>Conditional<br>or Optional | Location<br>Evaluation.exitDate   |
|--------------------|--|--|---|
|                    | <p>earliest of the following dates:</p> <ul style="list-style-type: none"> <li>▪ Exit Date for the Evaluation of the type Exit. The Exit Date must be within the IEP Start Date and the IEP End Date to be considered.</li> <li>▪ Enrollment End Date</li> <li>▪ IEP End Date</li> </ul> <p>2. When Enrollment End Date IS null:</p> <ul style="list-style-type: none"> <li>◦ One of the following is true: <ul style="list-style-type: none"> <li>▪ An IEP exists starting immediately after an existing plan. OR</li> <li>▪ An IEP has an end date that is prior to the last instructional day of the school year. OR</li> <li>▪ The most recent Evaluation with a type of Exit has an exit reason of SPED01 or</li> </ul> </li> </ul> |  | <p>OR</p> <p>Student Information&gt; General&gt; Enrollments&gt; End Date</p> <p>Enrollment.endDate</p> |

| Data Element Label | Business Requirement and Logic<br>SPED09<br>Reports the earliest of the following:   | Mandatory, Conditional or Optional | Location |
|--------------------|--|------------------------------------|----------|
|                    | <ul style="list-style-type: none"> <li>▪ IEP End Date</li> <li>▪ Exit Date for the Evaluation of the type Exit. The Exit Date must be within the IEP Start Date and the IEP End Date to be considered.</li> <li>▪ Last instructional day of the school year.</li> </ul> <p><b>ZZZ Calculation</b></p> <p>When there are enrollments connected with an end status of ZZZ AND a subsequent enrollment with a start status of ZZZ, the enrollments are combined into a reportable enrollment.</p> <ul style="list-style-type: none"> <li>• The latest end date of the combined enrollments reports for the enrollment end date.</li> <li>• The enrollments must be in the same school, grade, and local service type. Also, the enrollment start date must be the next instructional day after the ZZZ end status, or be before or equal to the ZZZ end status.</li> </ul> <p><b>Notes</b></p> <p>The end date being sent</p> |                                    |          |

| Data Element Label | Business Requirement and Logic  | Mandatory, Conditional or Optional | Location |
|--------------------|---|------------------------------------|----------|
|                    | <p>must be an instructional day. When the calculated date (using the logic above) is not an instructional day, the previous instructional day reports. Example:</p> <ul style="list-style-type: none"> <li>• 4/15/23 is the calculated end date, but is not an instructional day.</li> <li>• 4/14/23 is not an instructional day.</li> <li>• 4/13/23 is an instructional day.</li> <li>• 4/13/23 reports.</li> </ul> <p>When there are multiple enrollments that all start before the IEP starts, use the following logic to determine which enrollment to use to calculate the Enrollment End Date:</p> <ul style="list-style-type: none"> <li>• When reporting from the <b>Primary SPED Services School</b>, always uses the enrollment tied to the Primary SPED Services School.</li> <li>• When reporting from the <b>Secondary SPED Services School</b>, always uses the enrollment tied to the Secondary SPED Services School.</li> <li>• Otherwise, reports from the enrollment that has a <b>Service Type of P: Primary</b>.</li> </ul> <p>When the LRE (SPED Setting) is D: Public or Private Separate Day School for greater than 50% of the school day, the End Date does NOT report</p> |                                    |          |



| Data Element Label | Business Requirement and Logic  | Mandatory, Conditional or Optional | Location |
|--------------------|---|------------------------------------|----------|
| _etag              | until the associated enrollment has an end date. This logic also applies to amended IEPs. | O                                  |          |