



## Guide for Making Adjustments from DS4061/4120 to Audit Narrative

### 1. Aggregate Changes.

Step	Action
1.	Log on with Auditor Profile.
2.	Select the "Audit Form" from the Audit FTE menu.
3.	Select the School Year/Collection and the District and click the "Go" button.
4.	Adjust any fields on the Special Education tab.
5.	Click the "Save" button.
6.	Click the "Save as DS4061."
7.	Click the "General Ed" tab.
8.	Adjust any fields on the General Education tab.
9.	Click the "Save" button.
10.	Click "Save as DS4061."
11.	Click the "Additional Information" tab.
12.	Adjust any fields on the Additional Information tab.
13.	Click the "Save" button.
14.	Click "Save as DS4061."
15.	Click the "Residency Information" tab.
16.	Click the "Add New" button on the Residency Information tab if adding a district not already listed.
17.	Select a Resident District from the auto-complete dropdown list.
18.	Update any of the fields.
19.	Click the "Save" button.
20.	Adjust any fields on the Residency Information tab.
21.	Click the "Save" button.
22.	Click "Save as DS4061."
23.	Click the "Adult Ed" tab that requires adjusting.
24.	Adjust any fields on the Adult Education tab.

Step	Action
25.	Click the "Save" button.
26.	Click "Save as DS4061" (or "Save as DS4120" if changes are complete).
27.	Click the "Students – Gen & Spec Ed" tab.
28.	Filter for applicable students and/or individually selects students using the checkbox to the left of each record.
29.	Adjust each student record individually, the following information may be changed: <ul style="list-style-type: none"> <li>• Residency Code</li> <li>• Grade</li> <li>• Alternative Education</li> <li>• Special Ed Program</li> <li>• Section 52 FTE</li> <li>• Section 53 FTE</li> <li>• General Ed FTE</li> </ul>
30.	Click the "Save" button.
31.	Click "Save as DS4061."
32.	Click the "Students – Adult Ed" tab.
33.	Filter for applicable students and/or individually selects students using the checkbox to the left of each record.
34.	Adjust each student record individually, the following information may be changed: <ul style="list-style-type: none"> <li>• Diploma</li> <li>• Program</li> <li>• FTE</li> </ul>
35.	Click the "Save" button.
36.	Click "Save as DS4120."
37.	Click the "Go To Narrative" button.
38.	<b>Section I</b>
39.	Update Section I – Introduction tab as follows: <ul style="list-style-type: none"> <li>• Add comments by using the Additional Comments textbox.</li> <li>• If there is prior audit information in the database, the Date of Prior Field Audit column will reflect the date of the prior audit. Otherwise, type in the date of last field audit.</li> <li>• Select the Audit Type and Auditor from the dropdown lists for each applicable building listed.</li> <li>• Enter the Audit Hours, Pop I, Pop II, and Pop III fields for each applicable building listed.</li> </ul>
40.	Click the "Save" button.

Step	Action
41.	<b>Section II</b>
42.	Section II – Results tab <ul style="list-style-type: none"> <li>• Verify the Unaudited Count reflects the baseline numbers created at the end of week seven after the collection certification as of date.</li> <li>• Verify the Audited Count reflects the DS4120 counts, if it has been saved as 4120. If still in 4061 status, this column will show zeros.</li> <li>• Verify the Findings column reflects the findings in Section III.</li> <li>• Verify the Difference column is calculated correctly (difference between the Unaudited and Audit counts less the Findings).</li> </ul>
43.	If Section II is in an “out of balance” condition, adjust the findings in Section III or make adjustments to the DS4061.
44.	<b>Section III</b>
45.	Click the "Section III-Specific Findings" tab.
46.	Add a new finding: <ul style="list-style-type: none"> <li>• Select a building from the dropdown list.</li> <li>• Select the Audit Type.</li> <li>• Select a finding.</li> <li>• Enter the number of Pupils affected.</li> <li>• Enter the total number of FTE to adjust for this finding (must enter a '-' when subtracting FTE).</li> <li>• Select the FTE Type.</li> </ul>
47.	Click the "Comments" link (None, if a comment does not exist).
48.	Enter comments and click the "Save" button.
49.	Click the "Save" button for the row just entered.
50.	Access Section II – Results and click the "Refresh" button.
51.	<b>Section IV</b>
52.	Click the "Section IV-General Findings" tab.
53.	Add a new finding: <ul style="list-style-type: none"> <li>• Select a building from the dropdown list.</li> <li>• Select an Audit Type from the dropdown list.</li> <li>• Select a Finding from the dropdown list.</li> <li>• Enter a Comment.</li> </ul>
54.	Click the "Save" button.
55.	<b>Section V</b>
56.	Click the "Section V-Appeal Process" tab.
57.	Edit the first paragraph and clicks the "Save" button.

Step	Action
58.	Click the "Certify As Complete" button.
59.	Click the "OK" button.

## 2. Aggregate changes using the Student Tabs

Step	Action
1.	Log on with Auditor Profile.
2.	Select the Audit Form from the Audit FTE menu.
3.	Select the School Year/Collection and the District and click the "Go" button.
4.	Click the "Students – Gen & Spec Ed" tab.
5.	Filter for applicable students and/or individually selects students using the checkbox to the left of each record.
6.	Adjust each student record individually, the following information may be changed: <ul style="list-style-type: none"> <li>• Residency Code</li> <li>• Grade</li> <li>• Alternative Education</li> <li>• Special Ed Program</li> <li>• Section 52 FTE</li> <li>• Section 53 FTE</li> <li>• General Ed FTE</li> </ul>
7.	Click the "Save" button.
8.	Click the "Save as DS4061."
9.	Click the "Students – Adult Ed" tab.
10.	Filter for applicable students and/or individually selects students using the checkbox to the left of each record.
11.	Adjust each student record individually, the following information may be changed: <ul style="list-style-type: none"> <li>• Diploma</li> <li>• Program</li> <li>• FTE</li> </ul>
12.	Click the "Save" button.
13.	Click "Save as DS4120."
14.	Click the "Go To Narrative" button.
15.	Return to <b>Step 38 in Scenario 1</b> (page 2).

### 3. Making student level changes using the Mass Change

Step	Action
1.	Log on with auditor profile.
2.	Select the Audit Form from the Audit FTE menu.
3.	Select the School Year/Collection and the District and click the "Go" button.
4.	Click the "Students – Gen & Spec Ed" tab.
5.	Filter for applicable students and/or individually selects students using the checkbox to the left of each record.
6.	<p>Click the "Mass Change" button. The Mass Change form is displayed.</p> <ol style="list-style-type: none"> <li>1. Select whether the FTE change is per student or distributed over the selected students.</li> <li>2. Select the FTE Type.</li> <li>3. Enter the FTE Change (either per student or the amount to be distributed over the selected students). <i>You must enter a '-' when subtracting FTE.</i></li> <li>4. Enters a finding (optional).</li> <li>5. If a finding is entered, a building must be selected from the dropdown list.</li> <li>6. Enter a comment (optional).</li> <li>7. Click the "Save" button.</li> </ol> <p><b>Note:</b> <i>This will create a finding in Section III of the Narrative and is only applicable to General Education and Special Education Students. The Mass Change is not available for Adult Education.</i></p>
8.	<p>Click the "Save as DS4120" button. The following validation takes place:</p> <p><b>Special Education:</b> If changes were made to the Non-resident Sec52 column, user will receive the following error and the data will not be saved: "Residency information Special Ed must be equal to Special Ed Non-Resident Sec52 total minus Additional Info Non-res Pupils without Release (Special Ed)."</p> <p><b>General Education:</b> If changes were made that resulted in the total General Ed FTE being less than the Non-resident pupils without release on the Additional Information tab (General Ed column), user will receive the following error and the data will not be saved: The Additional Info General Ed Non-resident pupils without a release FTE cannot exceed the overall total General Ed FTE in the General Ed tab.</p> <p><b>Additional Information:</b> If changes were made that resulted in the Non-resident pupils without release on the Additional Information tab (General Ed column) being greater the total General Ed FTE, user will receive the following error and the data will not be saved: "The Additional Info General Ed Non-resident pupils without a release FTE cannot exceed the overall total General Ed FTE in the General Ed tab."</p> <p>If changes were made that resulted in the Non-resident pupils without release on the Additional Information tab (Special Ed column) being greater the total Special Ed FTE, user will receive the following error and the data will not be saved: "The Additional Info Special Ed Non-resident pupils without</p>

Step	Action
	<p>a release FTE cannot exceed the overall total Special Ed FTE in the Special Ed tab."</p> <p>If changes were made that resulted in the Non-public resident of district on the Additional Information tab (Special Ed column) being greater than the total Special Ed FTE in the Special Education tab, user will receive the following error and the data will not be saved: "The Additional Info Non-public resident of district Special Ed value cannot exceed the overall total Special Ed FTE in the Special Ed tab."</p> <p>If changes were made that resulted in the Non-public resident of district on the Additional Information tab (General Ed column) being greater than the total General Ed FTE in the General Education tab, user will receive the following error and the data will not be saved: "The Additional Info Non-public resident of district General Ed value cannot exceed the overall total General Ed FTE in the General Ed tab."</p> <p>If changes were made that resulted in the Special Ed FTE (Sec. 24) on the Additional Information tab (Special Ed column) being greater than the total Special Ed FTE in the Special Education tab, user will receive the following error and the data will not be saved: "The Additional Info Special Ed Section 24 FTE cannot exceed the overall total Special Ed FTE in the Special Ed tab."</p> <p>If changes were made that resulted in the General Ed FTE (Sec. 24) on the Additional Information tab (General Ed column) being greater than the total General Ed FTE in the General Education tab, user will receive the following error and the data will not be saved: "The Additional Info General Ed Section 24 FTE cannot exceed the overall total General Ed FTE in the General Ed tab."</p> <p><b>Residency Information:</b></p> <p>If changes were made to any of the e Special Ed columns resulting in the total of the Special Ed columns to be less than or greater than the total of the Non-Resident Sec52 column less the Non-resident pupils without release (Additional Information tab, Special Ed column), user will receive the following error and the data will not be saved: "Residency information Special Ed must be equal to Special Ed Non-Resident Sec52 total minus Additional Info Non-res Pupils without Release (special Ed)."</p>
9.	<p>Correct the data in the applicable tabs and save the form as 4120 (required).</p> <p>Necessary corrections could include:</p> <ul style="list-style-type: none"> <li>• Correct the data in the General Education and/or Additional Information tabs and save the form.</li> <li>• Correct the data in the Special Education, Residency Related Information and/or Additional Information tabs and save the form.</li> </ul>
10.	Click on "Go To Narrative" button.
11.	Return to <b>Step 38 in Scenario 1</b> (page 2).

#### 4. Printing the Audit Form

Step	Action
1.	Click the "Print" button.
2.	Users have the option to open, save or cancel the report.
3.	Report prints in .pdf format.