

WYOMING DEPARTMENT OF EDUCATION

WDE609 – School District Program Contacts

August 23, 2014

Data Collection Guidebook

WYOMING DEPARTMENT OF EDUCATION

WDE609 Data Collection Guidebook

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Introduction

The WDE609 is the annual collection, providing contact information used in the hard cover edition of the Wyoming Department of Education directory as well as The Wyoming Department of Education Fusion Portal online directory.

District and Accredited Institution staff will be able to review and edit data before certifying the WDE609 collection. This collection will take place within the **Data Collection** section of the Wyoming Department of Education Fusion portal. The WDE609 is meant to be used by WDE, district and accredited institution employees and is inaccessible to the general public.

This guidebook serves as the definitive instruction set for the data contained within the WDE609 Data Collection.

WDE609 Authority

School Districts and Accredited Institutions are required to submit a variety of data collections each year. The data collected by the Wyoming Department of Education (WDE) is critical and essential to the continual growth of Wyoming's education system. The authority allowing the WDE to collect data for the WDE609 collection is listed below:

W.S. 21-2-202 (a)(viii)

Instructions

Accessing the WDE609 Collection

The WDE609 collection can be accessed through the Wyoming Department of Education Fusion Portal at <http://www.fusion.edu.wyoming.gov>.



Within Fusion, click **Data Collection** at the top of the page and then **WDE609-School District Contacts** in the blue **Data Collection** box on the left side of the screen. The WDE609 splash/home page will contain links appropriate to your level of access.

If you do not have access to Fusion, click **Request Login** in the upper right-hand corner. If you have access to Fusion but not to the WDE609 link after clicking **Data Collections**, please see your Fusion Administrator.

WDE609 Roles

The WDE609 is an annual report that provides contact information for both district and accredited institution staff. Information from the Wyoming Department of Education Fusion Portal user accounts are preloaded into the WDE609 for districts to review and edit. Below is a list of positions for which District and School contact information is required:

Accredited Institution Roles

- **Education Director**
- **Executive Director**

WDE609 Data Elements

- **Prefix**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Preferred First Name**
- **Primary E-mail**
- **Alternate E-mail**
- **Photo**
- **Primary title**
- **User Type**
- **WISE Staff ID**
- **Status**
- **Responsibilities**
- **Phone Type**
- **Phone**
- **Address Type**
- **Address**
- **Address Line 2**
- **City**
- **Zip Code**
- **Zip + 4**
- **State**
- **User Name**
- **Parent Organization**
- **Child Organization**
- **Roles**
- **Primary Contact**

Prefix - Required

An appellation used to denote rank, placement, or status. i.e. Mr., Ms., Reverend, Dr., Pastor etc.

First Name - Required

The staff member's full LEGAL, first name.

Middle Name

Staff members middle name or middle initial.

Last Name - Required

Staff member's legal last name as printed on their social security card.

Suffix

Generation indicator i.e. Sr., Jr., III or degrees earned i.e. PhD.

Preferred First Name – Required if Applicable

The abbreviated legal name, middle name or nick name a person uses on a daily basis if other than the full legal first name.

Primary Email - Required

The primary accredited institution e-mail address assigned to the staff member.

Alternate Email

Alternative email address used by employee if applicable. Please do not provide personal email accounts.

Photo

Using the **Browse** link gives the user the opportunity to upload a picture.

Primary Title - *Required*

Primary title is the primary job title held by the person. This title is not necessarily the same as the role they fulfill in the directory.

User Type - *Required*

For accredited institution employees this field will always be LEA (Local Education Agency).

WISE Staff ID - *Required*

The Wyoming Department of Education seven-digit, state assigned staff record identifier. This number can be retrieved from the Staff Registration System (SRS) in Fusion.

Status - *Required*

Status is the person's employment status within the district. Current employees will have an **Active** status; employees who have separated from a district will have a status of **Inactive**. Changing a person's status from active to inactive will automatically delete all their roles except Fusion User. This allows them to be assigned to a new district if they switch jobs within the state while maintaining their user name and password. Only Fusion Administrators can activate or inactivate a user account.

Responsibilities

This field is narrative where districts can describe all work duties fulfilled by the employee.

Phone Type - *Primary Phone Required*

The type of phone number being entered e.g. primary phone, alternate phone, cell, fax or toll free. One telephone number can be entered for each phone type.

Phone - *Primary Phone Number Required*

Phone is a ten-digit phone number. The **Add Another** link must be selected to save the phone number within the User account. Includes a phone extension field that accepts up to five digits.

Address Type

The address type is primary or secondary work address dependent upon the address type selected. The address type must be selected to successfully input a complete address. The **Add Another** link must be selected to save the address within the User Account.

Address

The address is the post office box or street number and name where the user receives his or her work related mail.

Address Line 2

The Address Line 2 field is available for organizations whose address does not fit in the Address field.

City

Name of the city where the organization is located and/or mail is delivered.

Zip Code

Five digit identifier assigned by the US Postal Service.

Zip + 4

This code is an enhancement to the zip code and consists of four digits that identify a specific range of delivery addresses.

State

Name of the state where the organization is located. The state name can be selected from the drop box and for the purpose of this collection, will always be Wyoming.

User Name

This field is found by clicking on the **Edit Roles** link at the bottom of the **User Information** page. This field is automatically populated when the user account is created and is the name the user enters in the user name field when logging into Fusion.

Parent Organization - *Required*

This field is found by clicking on the **Edit Roles** link at the bottom of the **User Information** page. For the purpose of the WDE609 the parent organization will always be the accredited institution name and seven-digit Wyoming Department of Education assigned district identifier code.

Child Organization

This field is found by clicking on the **Edit Roles** link at the bottom of the **User Information** page. For the purpose of the WDE609 the child organization will always be blank for accredited institutions.

Roles - *Required*

This field is found by clicking on the **Edit Roles** link at the bottom of the **User Information** page. If selecting more than one role hold the Control key while highlighting selected roles. Click on the **Select** link after desired roles are chosen in order to add them to the user account. Click **Save** at the bottom of the page to save the roles and then click **Save** again at the bottom of the user information page to finalize the user account updates.

Primary Contact - *Required*

This field is found by clicking on the **Edit Roles** link at the bottom of the **User Information** page. A primary contact must be selected for the Education and Executive Director roles. The primary contact is the person you would like listed in the print directory. This field allows districts to assign multiple people to a role so more than one person can receive communications such as emails and letters. The primary contact field cannot be selected for a new individual if the primary contact field for that role is already selected in another user account. You must first uncheck the initial primary contact.

Collection Schedule

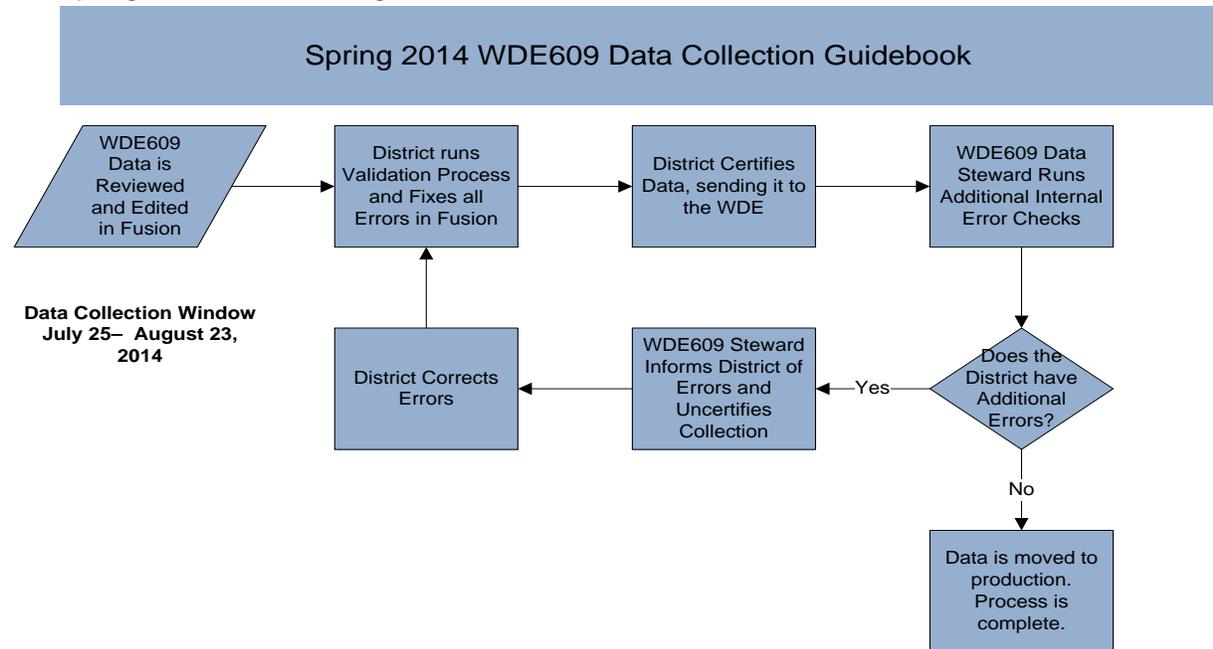
*WDE609 Spring Collection Window:
July 25 – August 23, 2014*

It is highly recommended that each school district validate the data by Wednesday, August 13, 2014. This will ensure that errors can be corrected and the data can be certified before the due date.

School district personnel may edit the WDE609 data and certify at any time on any day of the collection window.

Corrections to the spring 2014 WDE609 data are restricted to a firm time-line; any additional errors found by the WDE609 data steward must be corrected expeditiously in order to release an accurate and timely directory. It is requested that all final errors be corrected by the end of September.

The spring WDE609 is due August 23, 2014.



Data Submission

The WDE609 is submitted via the Wyoming Education Fusion Portal. The Fusion portal allows school districts to submit data more effectively and efficiently.

Accessing the WDE609 Collection

Once logged-in to the secure Fusion website, <http://fusion.edu.wyoming.gov>, the user will click the on the **Data Collection** link at the top of the page and then **WDE609-School District Contacts** in the blue **Data Collection** box on the left side of the screen. The WDE609 splash/home page will contain links appropriate to your level of access

If you do not have access to Fusion, click **Request Login** at the top of the Fusion Home page. If you have access to Fusion but not the WDE609 link after clicking **Data Collections**, please see your district's Fusion Administrator.

Home Page

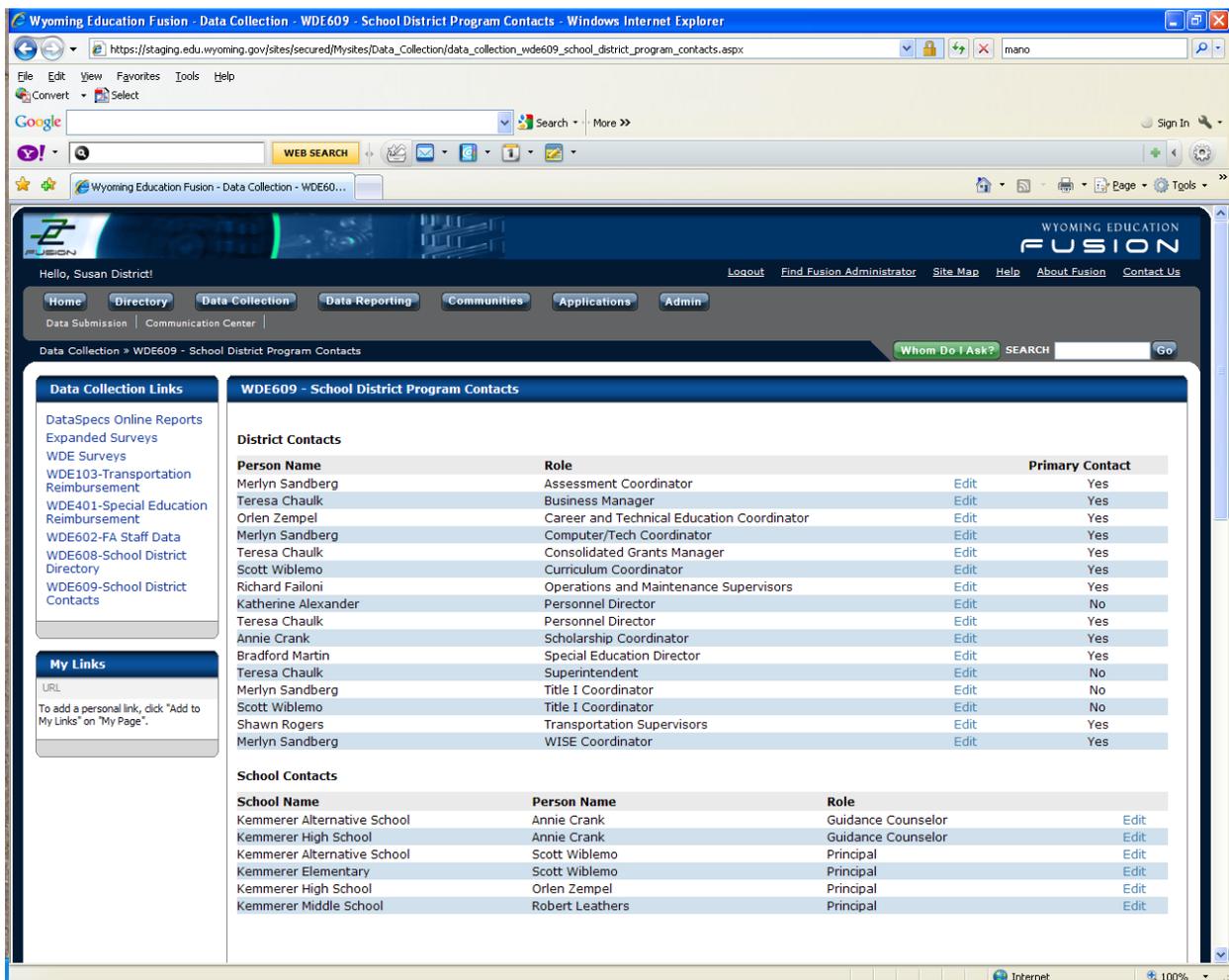
The following is the WDE609 home page seen after clicking **WDE609-School District Contacts**:

The screenshot displays the Wyoming Education Fusion portal interface. At the top, the browser title is "Wyoming Education Fusion - Data Collection - WDE609 - School District Program Contacts". The address bar shows the URL: https://staging.edu.wyoming.gov/sites/secured/Mysites/Data_Collection/data_collection_wde609_school_district_program_contacts.aspx. The page header includes "Hello, SUSAN DISTRICT!" and navigation links like "Logout", "Find Fusion Administrator", "Site Map", "Help", "About Fusion", and "Contact Us". Below the header is a navigation menu with tabs: "Home", "Directory", "Data Collection", "Data Reporting", "Career Guidance", "Communities", "Applications", and "Admin". The "Data Collection" tab is active, showing sub-links for "Forms Inventory", "Data Submission", "Data Validations", and "Communication Center". The main content area is titled "WDE609 - School District Program Contacts" and features a "Due Date: August 28th, 2010". Below this, there are four action buttons: "Edit", "Validate", "Certify", and "Report". A sidebar on the left contains "Data Collection Links" with a list of resources and "My Links" with a section for adding personal links. The browser status bar at the bottom indicates "Done, but with errors on page." and "Internet" connectivity.

Edit/Update Roles

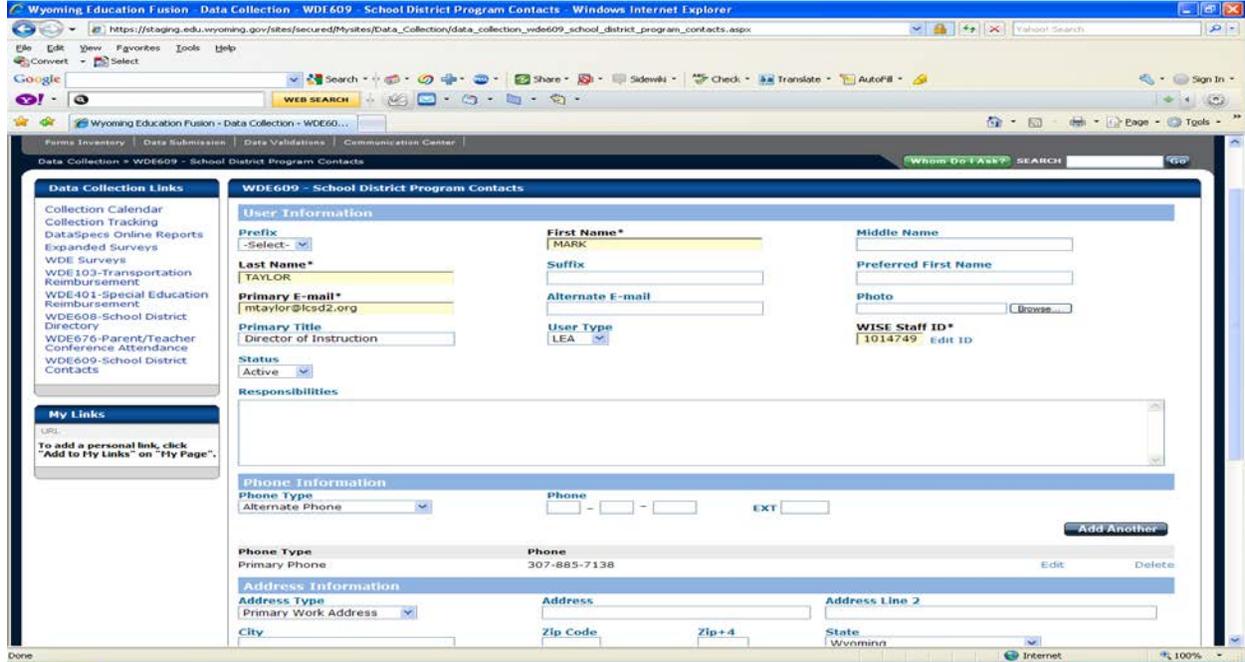
To edit or update a role, click **Edit** on the home page. You are taken to the following screen on which you will see all persons assigned required roles in the WDE609 School Program Contact Data Collection. Scroll to the bottom of the screen for a list of all district and school roles which must be filled. To edit a person’s information you can click on the **Edit** link next to their role. You will then be taken to the person’s **User Information** page. If the person you would like to assign a role is not listed on the page select the **Search** link at the bottom of the page.

You will only see roles assigned to your district.

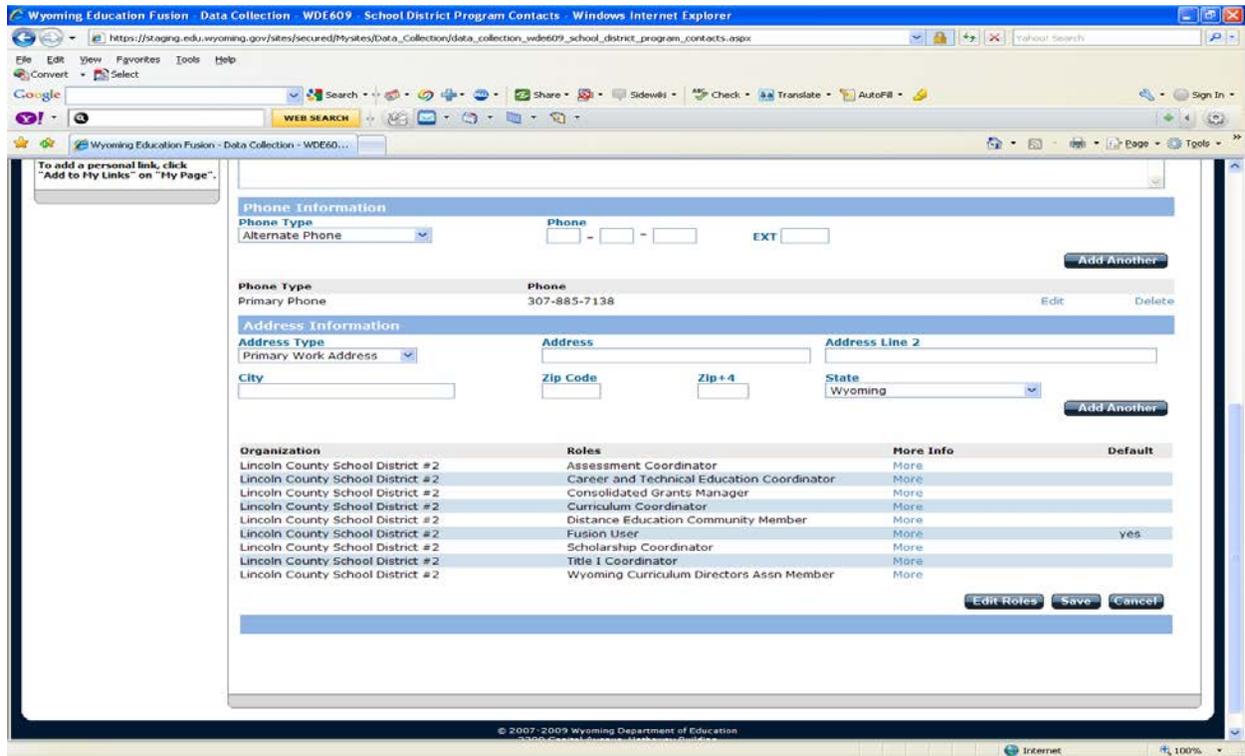


Click **Done** to return to the home page.

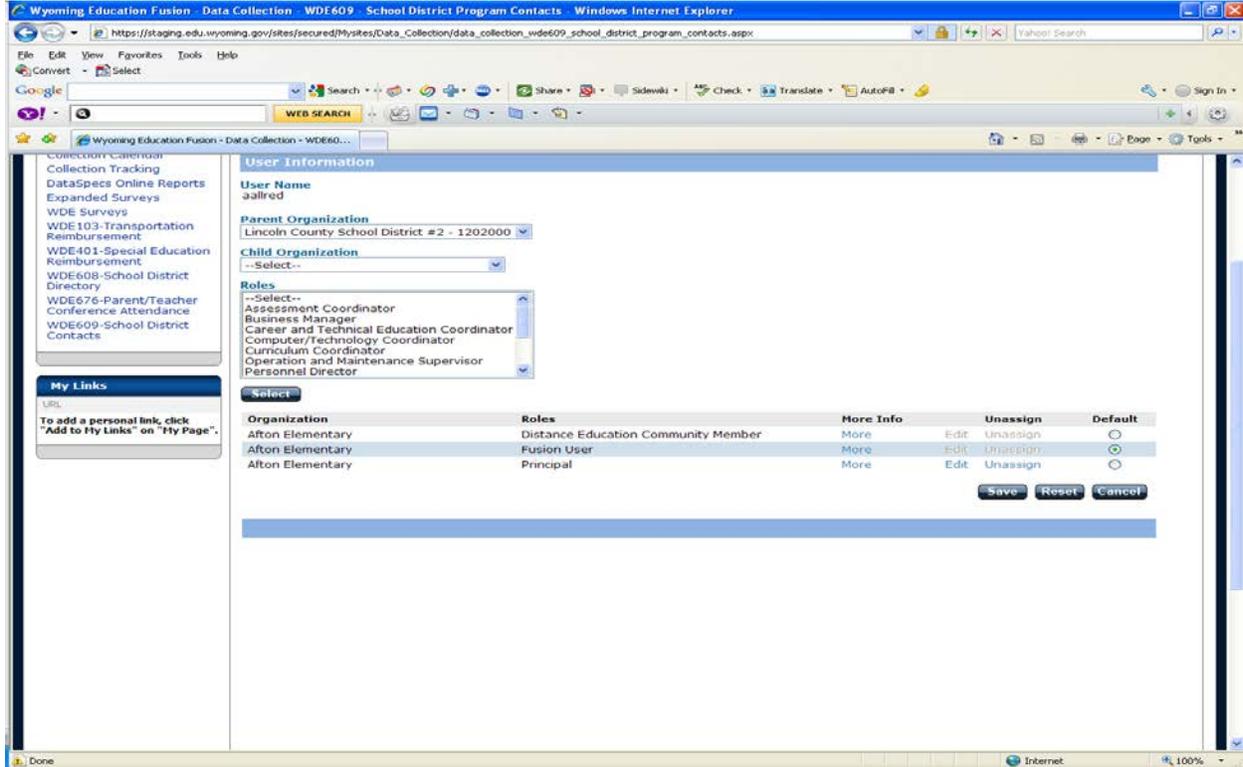
Top of the **User Information** screen:



Bottom of the page:



All general information can be updated on the main User Information page. In order to edit a person's roles you must scroll down to the bottom of the page and click the **Edit Roles** link.



New roles can be selected by choosing parent and child organizations as well as roles. Child Organizations are required for school staff only (Principals and Guidance Counselors). Roles can be added by highlighting the appropriate role and then clicking the **Select** link. As roles are added to the user account they will appear at the bottom of the page. After all roles have been added to the user account click on **Save** to return to the main user information page.

After User information has been reviewed and edits have been made click on the **Save** link. You will then be asked if you want to associate this user account with the existing staff member. Click **OK** to commit your updates. **Cancel** will return you to the previous WDE609 School District Program Contacts page.

Note: After editing roles you must save on both the edit roles page and the user information page in order to commit your changes.

Adding and Removing People from the WDE609

To assign a role to an employee who is not currently on the WDE609 School District Program Contacts page click on the **Search** link at the bottom of the page. You will then be taken to a Users Search page. Type in the criteria you wish to search out the individual with and click the **Search** link.

Note: If you are not finding the individual, try using less information. Search by district only or last name only.

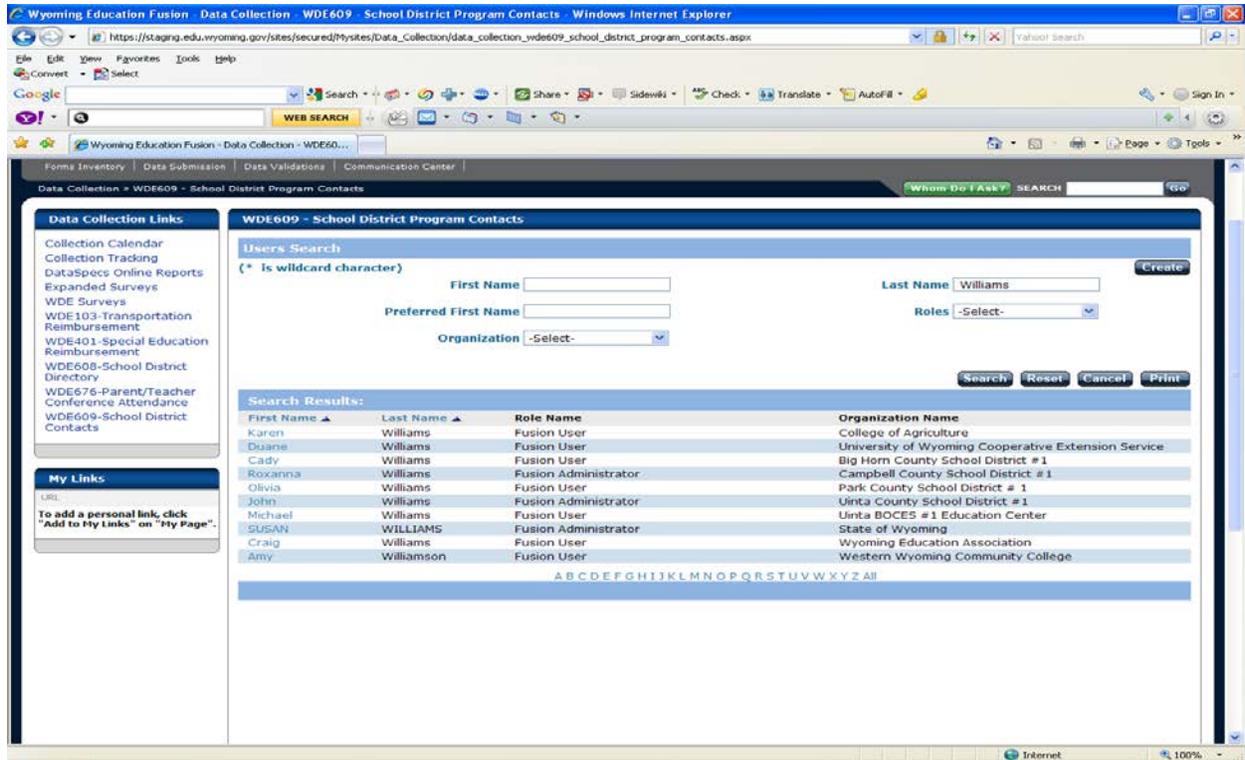
The screenshot shows a web browser window with the URL https://staging.edu.wyoming.gov/sites/secured/MySites/Data_Collection/data_collection_wde609_school_district_program_contacts.aspx. The page content includes:

- Expanded Surveys:** WDE Surveys, WDE103-Transportation Reimbursement, WDE401-Special Education Reimbursement, WDE602-FA Staff Data, WDE608-School District Directory, WDE609-School District Contacts.
- My Links:** A section with a URL field and instructions: "To add a personal link, click 'Add to My Links' on 'My Page'."
- District Contacts Table:**

| Person Name | Role | Edit | Primary Contact |
|---------------------|--|------|-----------------|
| Merlyn Sandberg | Assessment Coordinator | Edit | Yes |
| Teresa Chaulk | Business Manager | Edit | Yes |
| Orlen Zempel | Career and Technical Education Coordinator | Edit | Yes |
| Merlyn Sandberg | Computer/Tech Coordinator | Edit | Yes |
| Teresa Chaulk | Consolidated Grants Manager | Edit | Yes |
| Scott Wiblemo | Curriculum Coordinator | Edit | Yes |
| Richard Falloni | Operations and Maintenance Supervisors | Edit | Yes |
| Katherine Alexander | Personnel Director | Edit | No |
| Teresa Chaulk | Personnel Director | Edit | Yes |
| Annie Crank | Scholarship Coordinator | Edit | Yes |
| Bradford Martin | Special Education Director | Edit | Yes |
| Teresa Chaulk | Superintendent | Edit | No |
| Merlyn Sandberg | Title I Coordinator | Edit | No |
| Scott Wiblemo | Title I Coordinator | Edit | No |
| Shawn Rogers | Transportation Supervisors | Edit | Yes |
| Merlyn Sandberg | WISE Coordinator | Edit | Yes |
- School Contacts Table:**

| School Name | Person Name | Role | Edit |
|-----------------------------|-----------------|--------------------|------|
| Kemmerer Alternative School | Annie Crank | Guidance Counselor | Edit |
| Kemmerer High School | Annie Crank | Guidance Counselor | Edit |
| Kemmerer Alternative School | Scott Wiblemo | Principal | Edit |
| Kemmerer Elementary | Scott Wiblemo | Principal | Edit |
| Kemmerer High School | Orlen Zempel | Principal | Edit |
| Kemmerer Middle School | Robert Leathers | Principal | Edit |
- Required Roles:** A section at the bottom of the page with a search bar and buttons for "Search" and "Done". A green arrow points to the "Search" button.

Your search will produce a list of persons who meet your search criteria. Click on the person’s first name to have access to their **User Information** page. If the person you are seeking is not on the list see your district’s Fusion Administrator to have a Fusion User Account created.



If you have a new hire who has previously worked in the state of Wyoming and the staff member has a User Account but their account is inaccessible, you will need to call their previous district and have their Fusion Administrator enter the **User Information** page and **Deactivate** the employee. This will allow your district’s Fusion Administrator to open their user account and activate them under your district.

Note: *Only Fusion Administrators have the rights to Activate or Deactivate user accounts.*

Once the Fusion User Information page is accessed information can be edited and roles can be assigned.

To remove a person from the WDE609 you will need to un-assign their role or deactivate their account depending on if they are still employed by your district.

For persons who are no longer employed by your district have your Fusion Administrator inactivate their account by opening their User Information page and in the **Status** drop box change the work status from Active to **Inactive** or select the **Deactivate** link at the bottom of the User Information page.

The screenshot shows the 'User Information' form in the Wyoming Education Fusion system. The 'Status' dropdown menu is currently set to 'Inactive'. A green arrow points to this dropdown menu. The form includes fields for Prefix (Shadd), First Name (Shadd), Middle Name, Last Name (District2), Primary E-mail (sschut@educ.state.wy.us), Primary Title, User Type (LEA), and WISE Staff ID (3625147). There are also sections for Phone Information and Address Information.

When **Inactive** is selected the user will no longer have login rights to Fusion and all roles except Fusion User will be terminated automatically. The person's information will remain intact within the system in case they were to work for you or another district in the future.

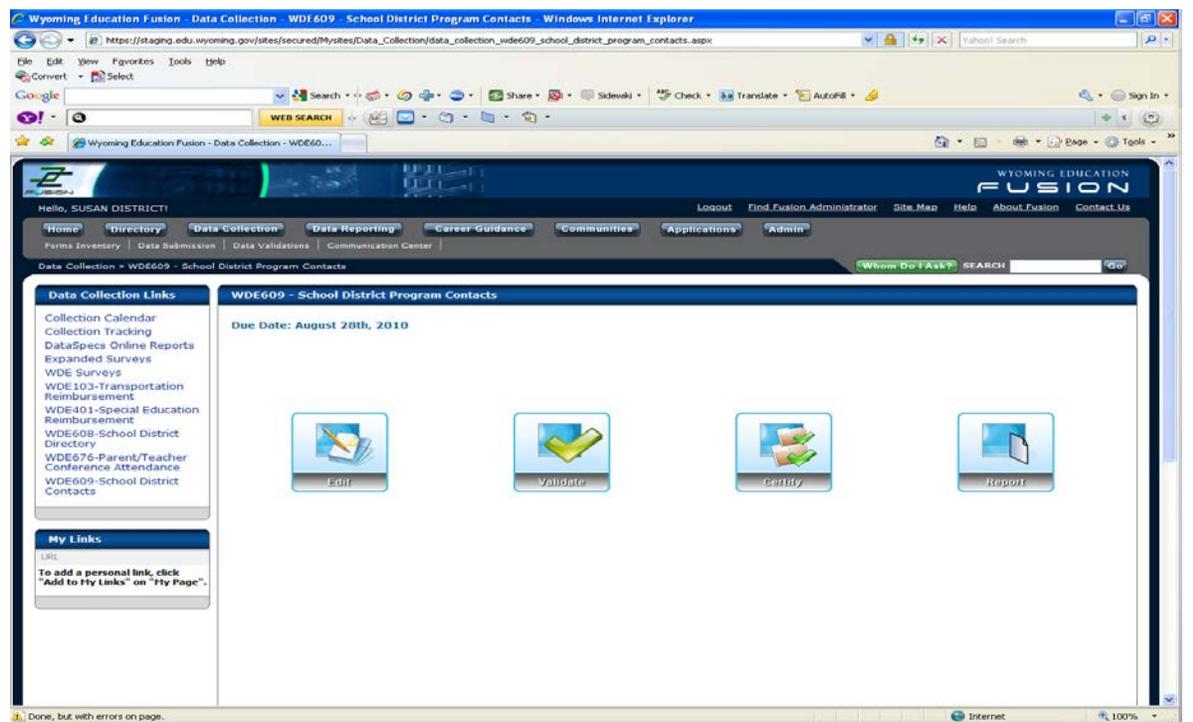
To un-assign a role for a person who has changed positions within your district you will need to access their User Information page and click on the **Edit** link. At the bottom of the next page, click on **Edit Roles**. The next screen will have a list of all the Fusion User roles assigned. Roles can individually be unassigned by clicking on the **Unassign** link. The role will then be removed from the page and the **Save** link must be selected to commit the removal of the role. Click **Save** again on the user information page and you will then be taken to a page that informs you the user information has been updated. Click **OK**.

Note: Only WDE609 roles can be edited and unassigned within the WDE609 collection.

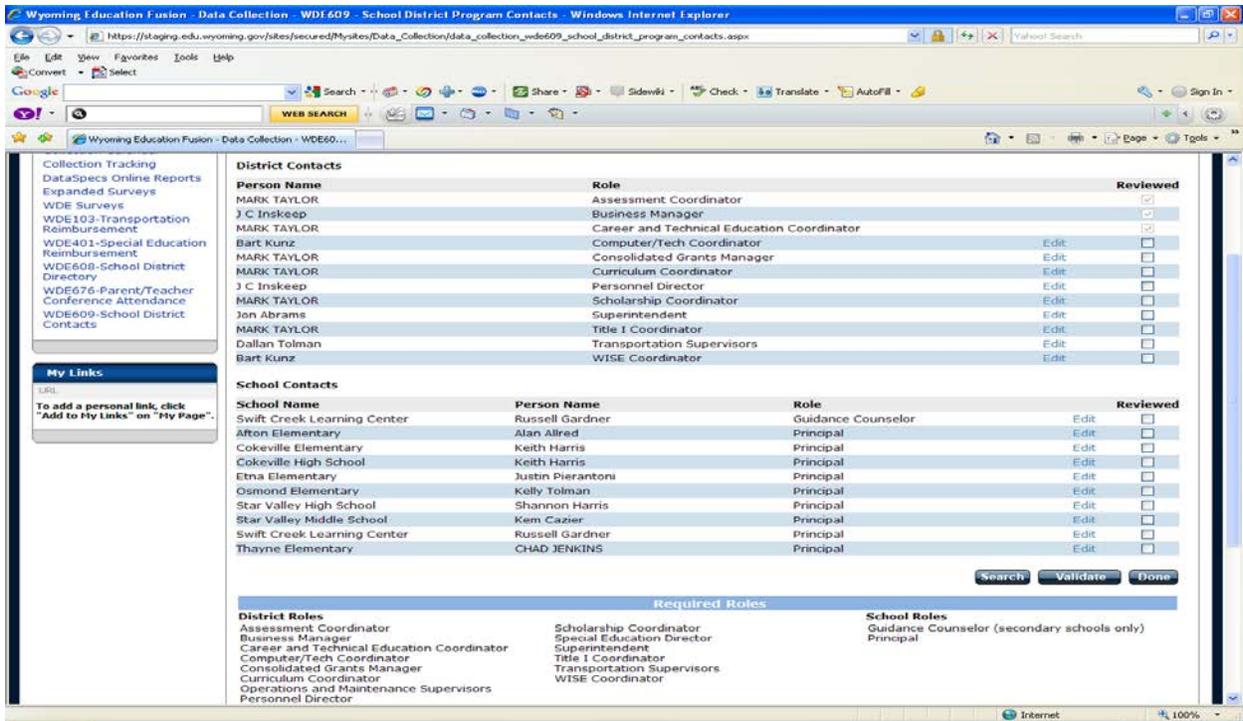
Note: When reassigning a role DO NOT open the role and change the name and e-mail. Each user account has its own user name. For example Jane Doe's user name would be jdoe. If Jane were to leave and you replaced her with a staff member named Paula Jones and you changed the first and last name your new employee would have a fusion user account of jdoe. Instead inactivate the user account or delete the roll for Jane Doe and have your Fusion Administrator open a new user account for Paula.

Validate Data

Once all the WDE609 contacts have been reviewed and necessary changes made the data is ready to validate. Data must be validated prior to certification. Click Validate under WDE609 - School District Programs Contacts on the home page:



You will be taken to a screen that lists all of your reported WDE609 contacts.



If a staff member’s information has been reviewed through the **Edit** process, check the **Reviewed** box next to the person’s role. The data will not be certified for individuals that do not have the **Reviewed** box checked.

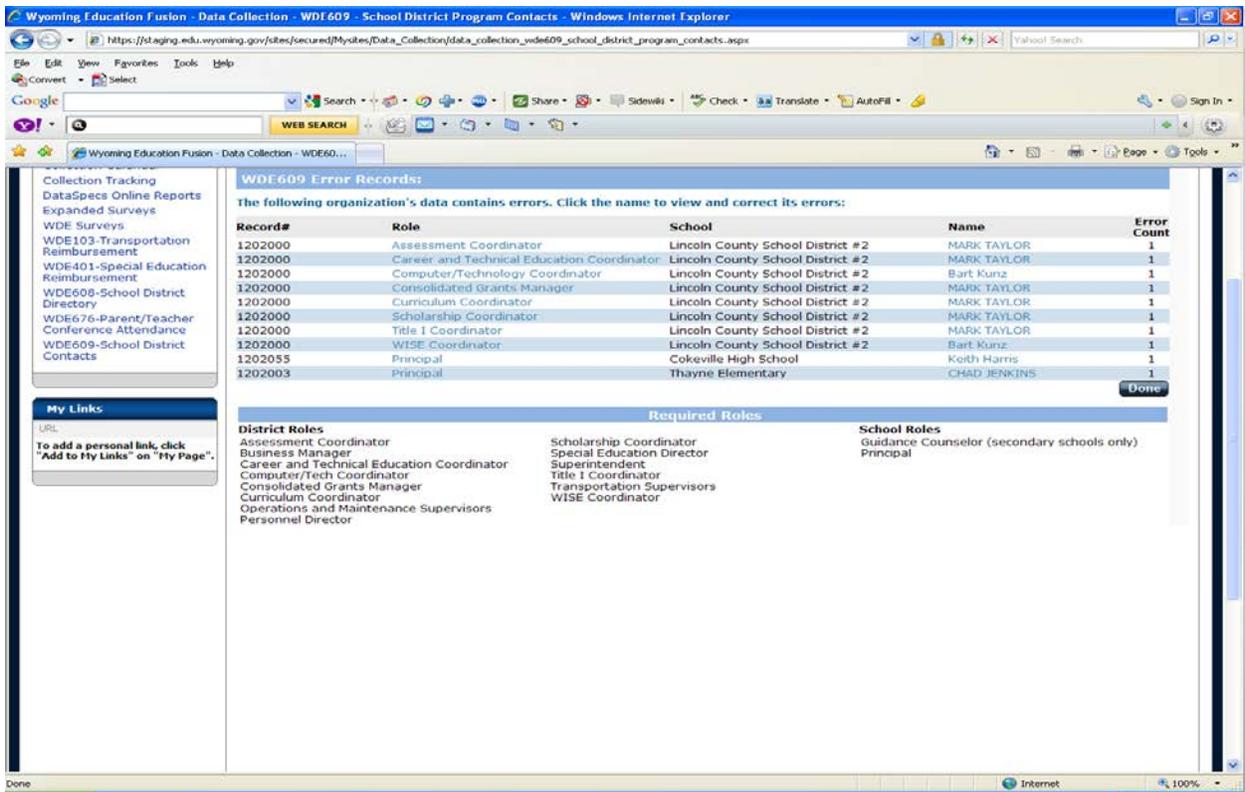
*Note: Once a box is checked and **Validate** or **Done** is clicked, the box will be checked and grayed out and cannot be unchecked.*

If **Reviewed** has been checked for all of the WDE609 contacts in your district, you skip the above page and are taken directly to the list of employees with errors and their error count, shown below.

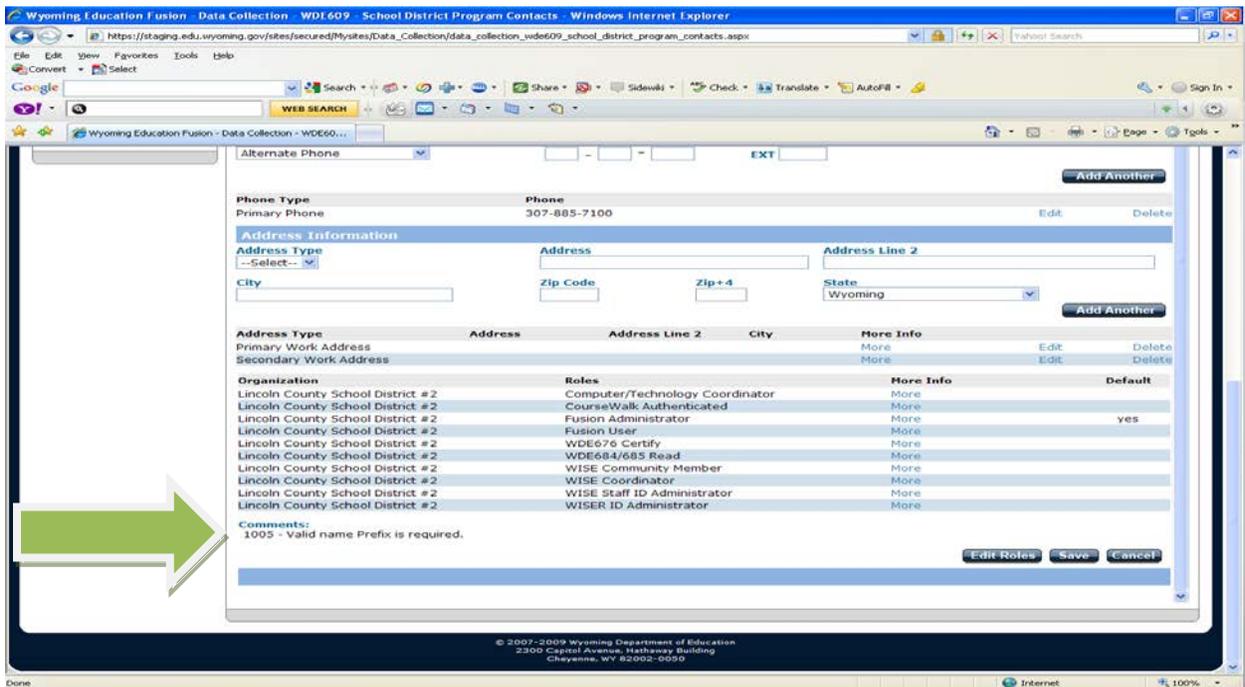
Click **Validate** to validate the data for all the organizations on this screen for which the **Reviewed** checkbox is checked.

Click **Done** to return to the home page.

After clicking **Validate**, the system will check for errors in the data (e.g., apply the business rules in Appendix A) and display the following screen if one or more errors are found in the data:



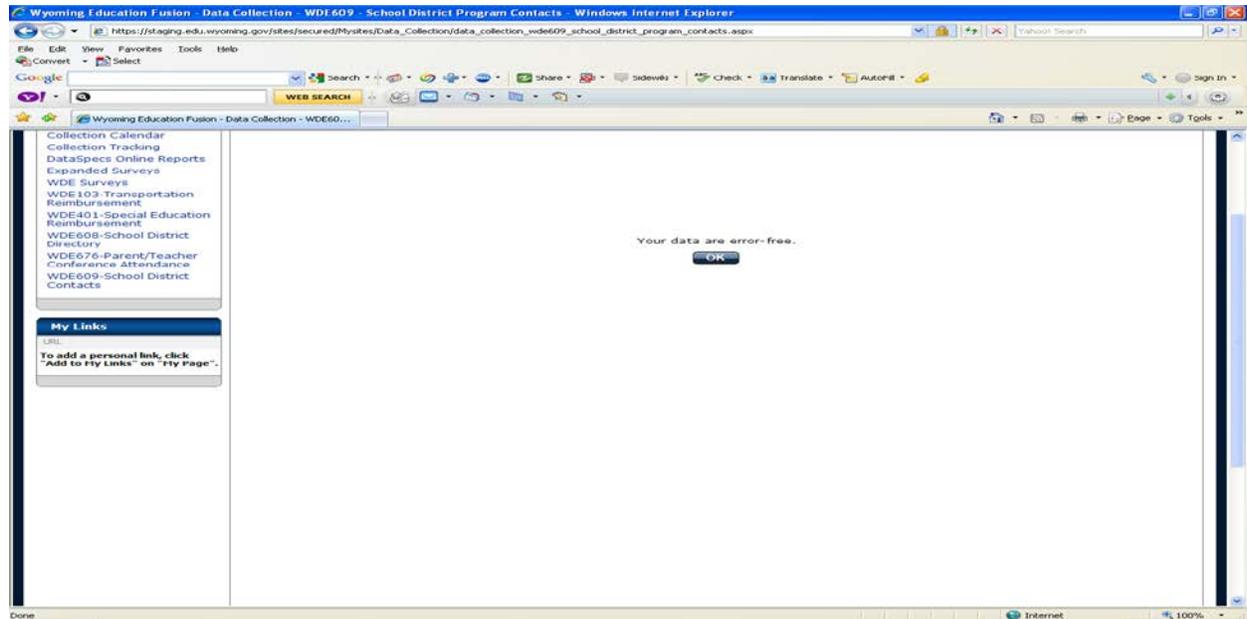
Click on the employee name or role and scroll to the bottom of the next screen for a list of errors. The screen is the same as the **Edit User Information** screen except that the errors are listed in a **Comments** section at the bottom of the screen:



All errors must be corrected before the data can be certified. After the errors are corrected, click **Save** (or **Cancel** to return to the list of schools/organizations with errors without saving changes). The screen is refreshed with the new information. If you have successfully fixed all the errors with an individual, he or she will be removed from this list.

You may fix other errors by clicking another employee's name or click **Done** to return to the home page.

If all of the data is error free, the following screen is displayed:



Click **OK**. You will now be given the opportunity to certify the data or return to the WDE609 home page. Certification rights are usually reserved for someone at the district level. If you only have edit rights, you will not see the **Certify** button.

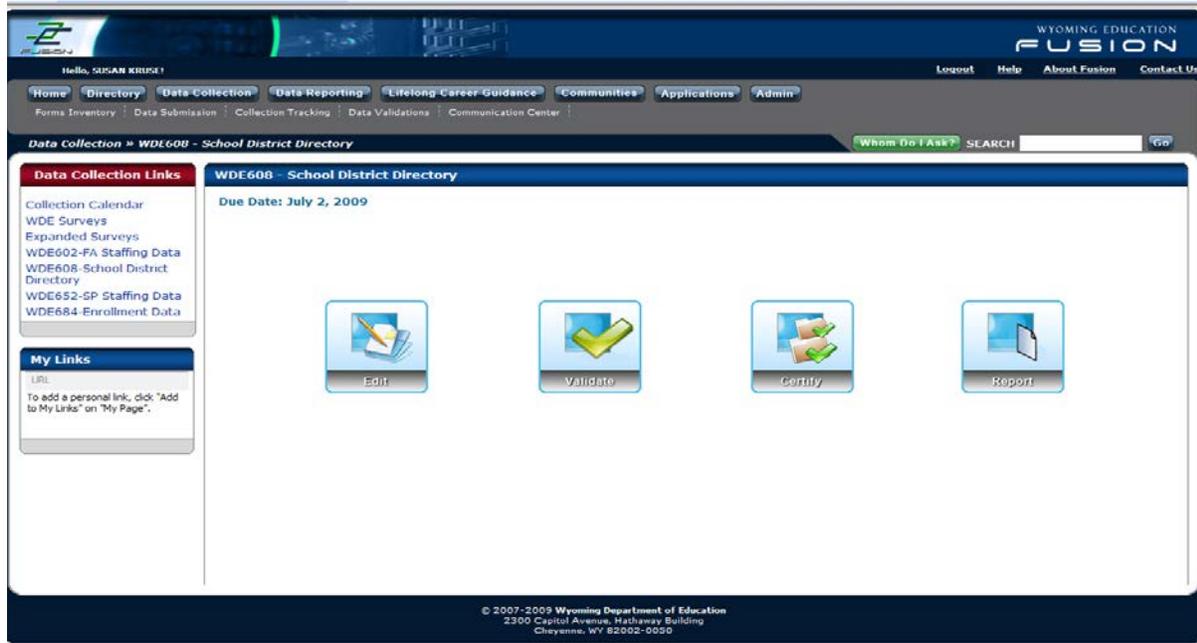
If you have more than one person listed for a position you will see a message listing the roles that have multiple users assigned. This is not an error merely a warning. Multiple users can be assigned to a role but all roles other than superintendent, principal and guidance counselor may only have one primary contact.

Click **Certify** to begin the certification process. This is the same as clicking **Certify** on the home page (see Section 4). Note that the first step in certifying data is to validate the data, so you should see a second message confirming the lack of errors in the data after clicking **Certify**.

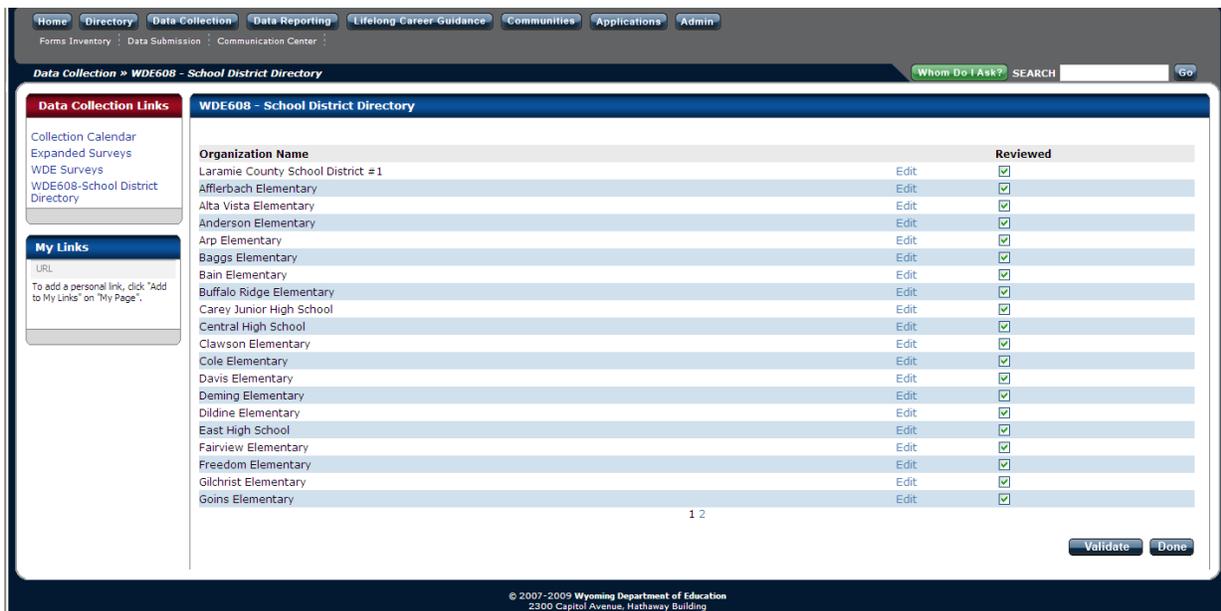
Click **Return to WDE609 Home** to return to the home page.

Certify Data

Once you have validated the data and determined that there are no errors, the data may be certified. Click Certify on the WDE609 home page (or at the end of the validation process as described above)

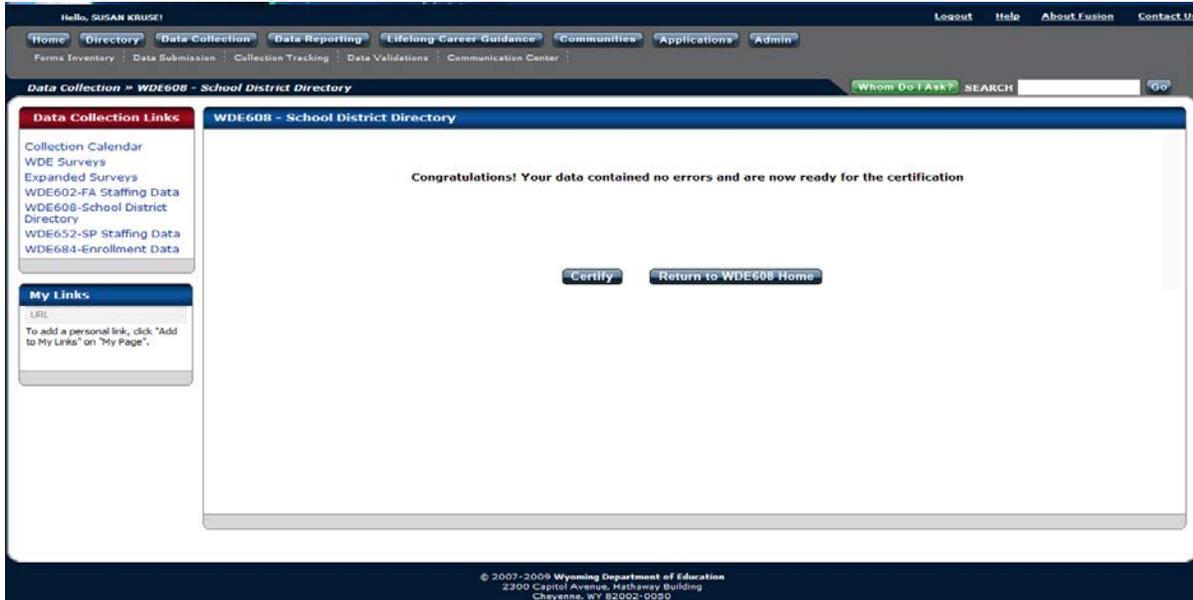


If every **Reviewed** box next to the organization names wasn't already checked, the following screen is displayed:



For every organization that does not have the **Reviewed** box checked, edit/review the information, make and save any necessary changes, and check the **Reviewed** box. Then, click **Validate**.

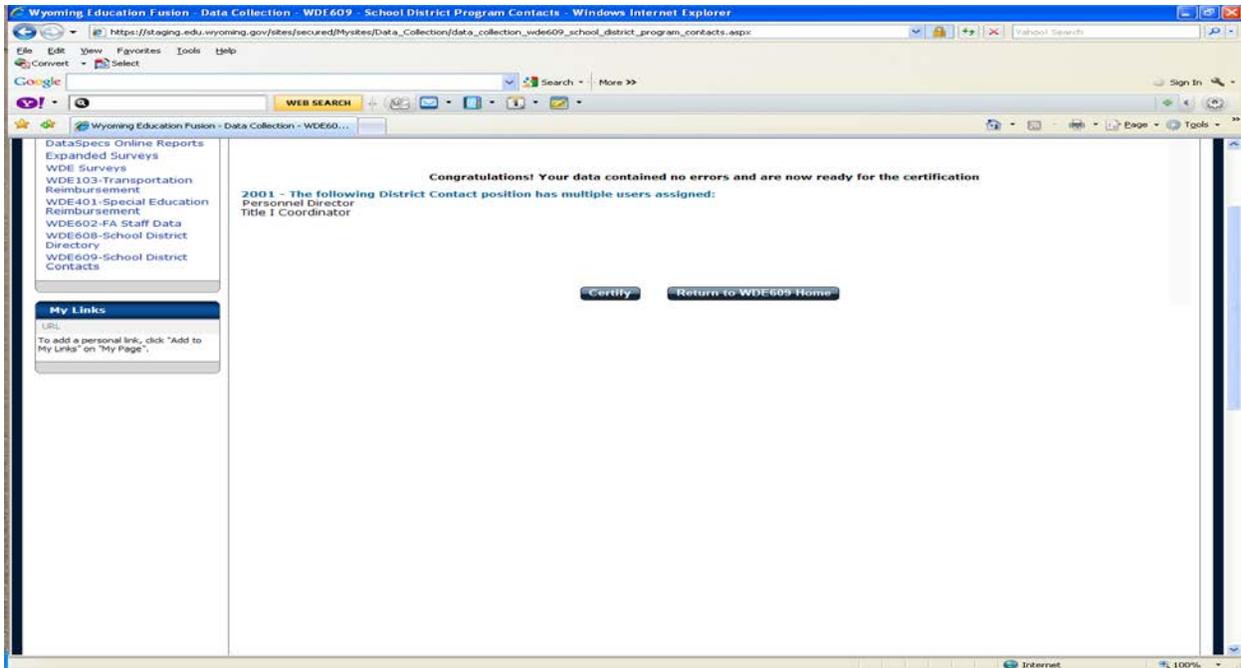
After clicking **Validate**, the system validates the data and displays the following screen if there were no errors found:



*Note: You are taken directly to this screen after clicking **Certify** on the WDE609 home page if all of the **Reviewed** boxes were already checked and there were no errors in the data.*

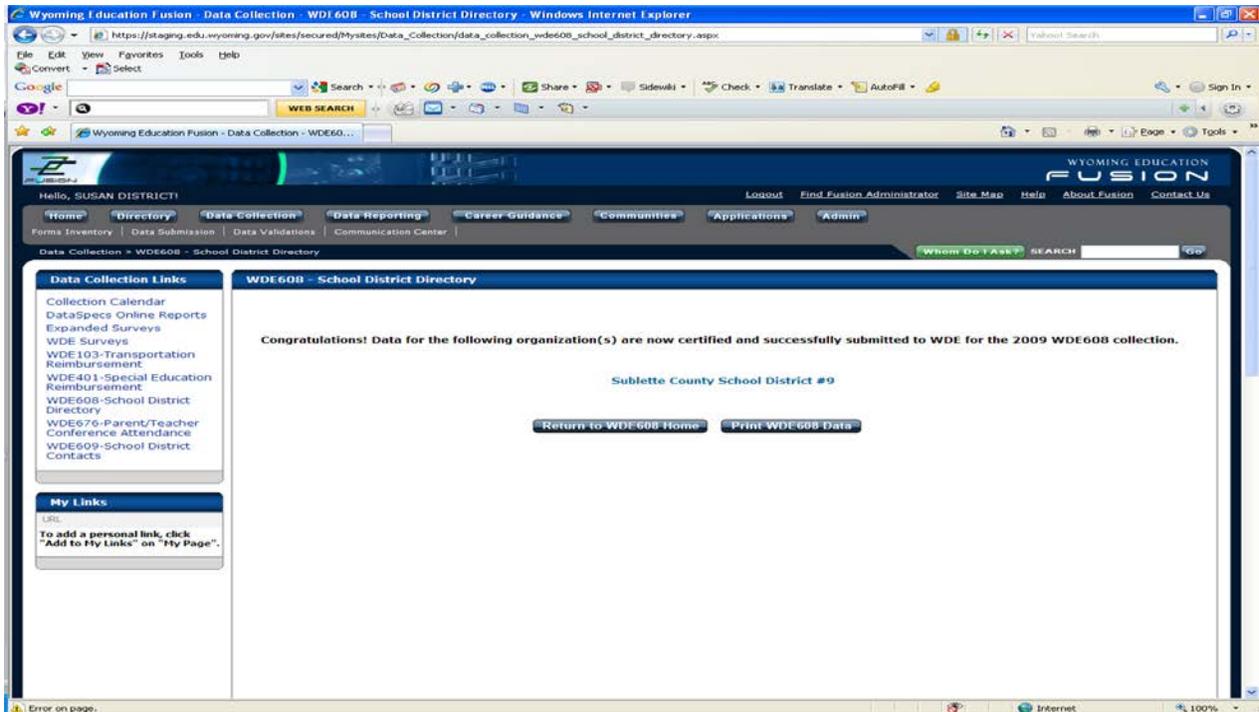
Certification completes your submission to the Wyoming Department of Education.

The following screen appears after clicking **Certify**:



Click **Continue Certifying Data** to continue the process.

Once certification is complete (if there are no errors), you will see the following screen indicating that the certification process is complete:



Click **Return to WDE609 Home** to return to the home page or **Print WDE609 Data** to export and save or export and print the submitted data. You may also move to another portion of Fusion or exit Fusion at this time.

Once your data are certified, you will no longer be able to validate or certify although you can still edit. If you find an error, contact Susan Williams at susan.williams@wyo.gov or 307-777-6252 to have your data decertified.

Printing Data

In order to print a complete spreadsheet of the WDE609 data you submitted you must select an export format icon at the top of the page.

The screenshot shows the 'WDE609 - School District Program Contacts' page. At the top right of the table area, there are three export icons: Excel, PDF, and CSV. A large green arrow points to these icons. Below the table, there is a list of roles and their corresponding contact information.

| Role | Prefix | First Name | Middle Name | Last Name | Suffix | Primary Email |
|--|--------|------------|-------------|-----------|--------|----------------|
| District Roles | | | | | | |
| Assessment Coordinator | MR | Merlyn | | Sandberg | | msandberg@lk |
| Business Manager | MS | Teresa | | Chaulk | | tchaulk@lcsd |
| Career and Technical Education Coordinator | MR | Orlen | | Zempel | | ozempel@lcsd |
| Computer/Technology Coordinator | MR | Merlyn | | Sandberg | | msandberg@lk |
| Consolidated Grants Manager | MS | Teresa | | Chaulk | | tchaulk@lcsd |
| Curriculum Coordinator | MR | Scott | | Wiblemo | | swiblemo@lcs |
| Operation and Maintenance Supervisor | MR | Richard | | Failoni | | rfailoni@lcsd1 |
| Personnel Director | MS | Katherine | Megan | Alexander | | maloxander@l |
| Personnel Director | MS | Teresa | | Chaulk | | tchaulk@lcsd |
| Scholarship Coordinator | Mrs. | Annie | | Crank | | acrank@lcsd1 |
| Special Education Director | MR | Bradford | | Martin | | bmartin@lcsd |
| Superintendent | MS | Teresa | | Chaulk | | tchaulk@lcsd |
| Title I Coordinator | MR | Merlyn | | Sandberg | | msandberg@lk |
| Title I Coordinator | MR | Scott | | Wiblemo | | swiblemo@lcs |
| Transportation Supervisor | Mr | Shawn | | Rogers | | srogers@lcsd |

The document can then be opened and printed or saved to your hard drive.



Reports

A report of the WDE609 data submitted can also be accessed by clicking on the **Report** link on the WDE609 home page and then selecting the **Data Report** link.

Follow the directions above for printing or saving the document.

WDE609 Fusion Rights

The presence of links in the blue **Data Collection** window on the left side of the **Data Collection** link depends on the user's rights:

| Role | Edit | Validate | Certify | Report |
|----------------|-------------|-----------------|----------------|---------------|
| WDE609 Read | No | No | No | Yes |
| WDE609 Edit | Yes | Yes | No | Yes |
| WDE609 Certify | Yes | Yes | Yes | Yes |

The **Edit** button is available year-round because there are a few data fields, such as address and phone information that is editable year-round. The **Validate** and **Certify** buttons are only available during the open collection window for WDE609: **July 25 – August 23, 2014**. During this window, if the user has rights for an action as specified above, the button appears; if not, the button does not appear.

The **WDE609** window shows a list of all district and school contacts who are currently assigned WDE609 roles. The **Reviewed** checkbox is used to indicate that a user has reviewed the employee's information and made any necessary changes – and that data is ready for validation and certification. This column of checkboxes is also only displayed during the collection window. The collection cannot be certified until all boxes are checked.

Errors in Data

Once the WDE609 has been certified and sent to the Wyoming Department of Education the WDE Data Steward will manually import the information into the database and run additional internal error checks. If additional errors are found the district will be notified via an e-mail and the collection will be decertified allowing districts to fix the errors.

Send to WDE



Once all errors have been corrected the data can be revalidated and recertified, sending it to the WDE. All additional errors must be corrected by the end of September in order to produce hard copies of the Wyoming Department of Education directory in a timely manner.

Frequently Asked Questions

WHOM DO I CONTACT REGARDING WDE609 CONTENT QUESTIONS?

Shannon Cranmore – 307-777-6245 or shannon.cranmore@wyo.gov

WHOM DO I CONTACT REGARDING SUBMISSION QUESTIONS OR PROBLEMS?

Shannon Cranmore – 307-777-6245 or shannon.cranmore@wyo.gov

WHOM DO I CONTACT REGARDING USERNAME AND PASSWORDS FOR FUSION?

Your district's Fusion Administrator.

WHOM DO I CONTACT REGARDING THE WYOMING DEPARTMENT OF EDUCATION FUSION PROJECT AS A WHOLE?

Susan Williams – 307-777-6252 or susan.williams@wyo.gov

Appendix A: Business Rules

| RULE # | RULE TYPE | PROBLEM DESCRIPTION | PROBLEM DETAILS |
|--------|-----------|---------------------------------|---|
| 1001 | ERROR | Missing Position | Required Office Position is missing. |
| 1002 | ERROR | Missing Principal | School is missing Principal. |
| 1003 | ERROR | Duplicate Publishing Indicators | Only one person can have the indicator for Primary Contact for this Position |
| 1100 | ERROR | Missing Phone Number | Phone Number is required with position is not vacant. |
| 1101 | ERROR | Missing Phone Type | Phone Type is required when entering Alt Phone Number and Position is not Vacant. |
| 1102 | ERROR | Missing Email Address | Email Address Is Required when Position is not Vacant. |
| 1103 | ERROR | Missing Name Prefix | Name Prefix is required when Position is not Vacant. |
| 2001 | WARNING | Vacant Required Position | Required Office Position is vacant. |

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