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Arizona Department of Education

FY 2010 Limiting Module and Concurrency Changes

Business Requirements

Version: 1.0
Last updated: 3/26/2010
Arizona Department of Education
Information Technologies Department
Business Analysis

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Ticket #:	
Stakeholders:	School Finance
Primary Document Location:	http://www.ade.az.gov/sais/

Approvals:

Version	Date	Name / Stakeholder	Unit	Form of Approval
		School Finance		

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Revision Log

All revisions to this Software Requirements Specification (SRS) will be documented in this log. The initial draft document will be numbered v0.01 and incremented when revisions are made. The document that is approved will be v1.0.

Revision	Date	Description	Name
1.0	3/25/2010	Published document	Business Analysis

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1 LIMITING MODULE REQUIREMENTS

1.1 Limiting Membership Days by Fiscal Year

1.1.1 System shall limit membership days by fiscal year for all concurrencies or subsequent memberships.

Existing Limiting Module Rule: limit membership days by submission periods except for District/District and Charter/Charter concurrencies or subsequent memberships.

1.2 Students with More than 1 Membership

1.2.1 Students with more than 1 membership in a fiscal year and no JTED membership, where the total ADM for the student is greater than 1.0 shall be limited proportionally to the maximum of 1.0.

1.2.2 District/District concurrencies or subsequent memberships shall also be limited to 1.0 ADM.

Scenarios:

1.2.2.1 *When a student has concurrent membership in District A and District B within a fiscal year, his/her total ADM shall be limited to 1.0.*

1.2.2.2 *When a student has membership in District A and then a subsequent membership in District B, within a fiscal year, his/her total ADM shall be limited to 1.0.*

1.2.3 Charter/Charter concurrencies or subsequent memberships shall also be limited to 1.0 ADM.

Scenarios:

1.2.3.1 *When a student has concurrent membership in Charter A and Charter B within a fiscal year, his/her total ADM shall be limited to 1.0.*

1.2.3.2 *When a student has membership in Charter A and then a subsequent membership in Charter B, within a fiscal year, his/her total ADM shall be limited to 1.0.*

1.2.4 District/Charter concurrencies or subsequent memberships shall be limited to 1.0 ADM (Existing Rule).

Scenarios:

1.2.4.1 *When a student has concurrent membership in District A and Charter District B; within a fiscal year, his/her total ADM shall be limited to 1.0.*

1.2.4.2 *When a student has membership in Charter District A and then a subsequent membership in District B or vice-versa; within a fiscal year, his/her total ADM shall be limited to 1.0.*

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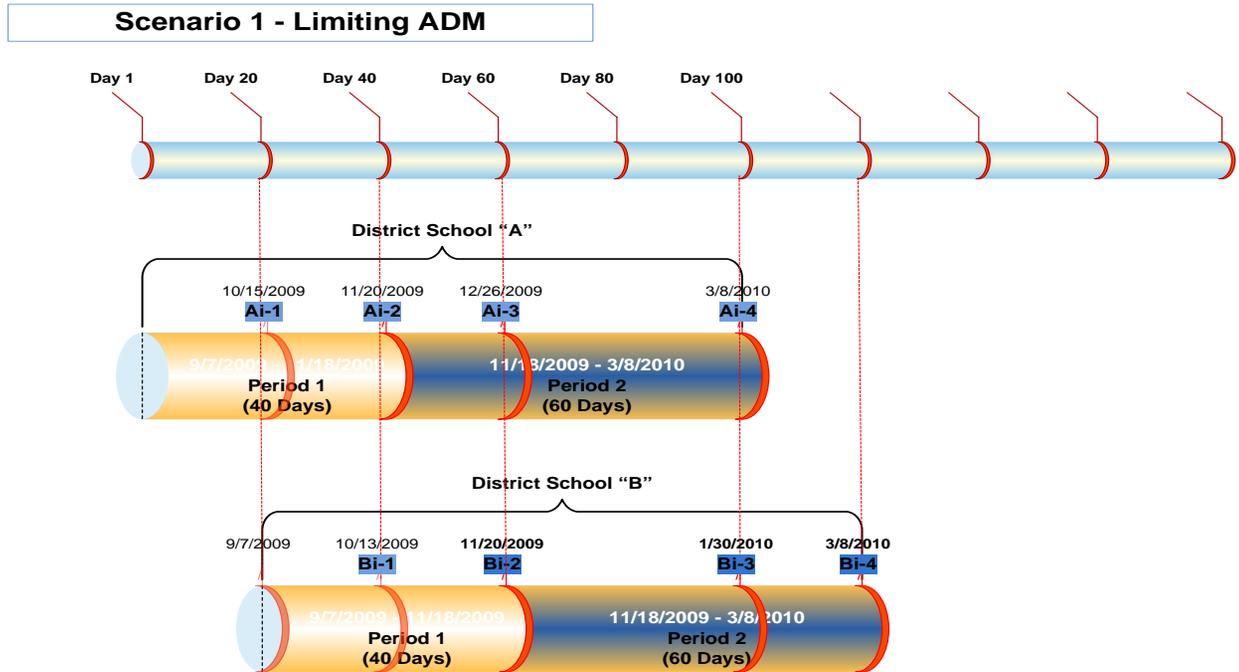
- 1.2.5 If an instance of overlap exists between any JTED membership (Satellite or Main) for a student residing in the Member District and Charter then the Average Daily Membership limit is 1.25 otherwise the limit is 1.0.
- 1.2.6 If an instance of overlap exists between any JTED satellite membership and its Resident Member District then the Average Daily Membership limit is 1.25 otherwise the limit is 1.0.

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2 LIMITING MODULE SCENARIOS

2.1 District/District Concurrencies or Subsequent Memberships

Figure 1: Scenario 1

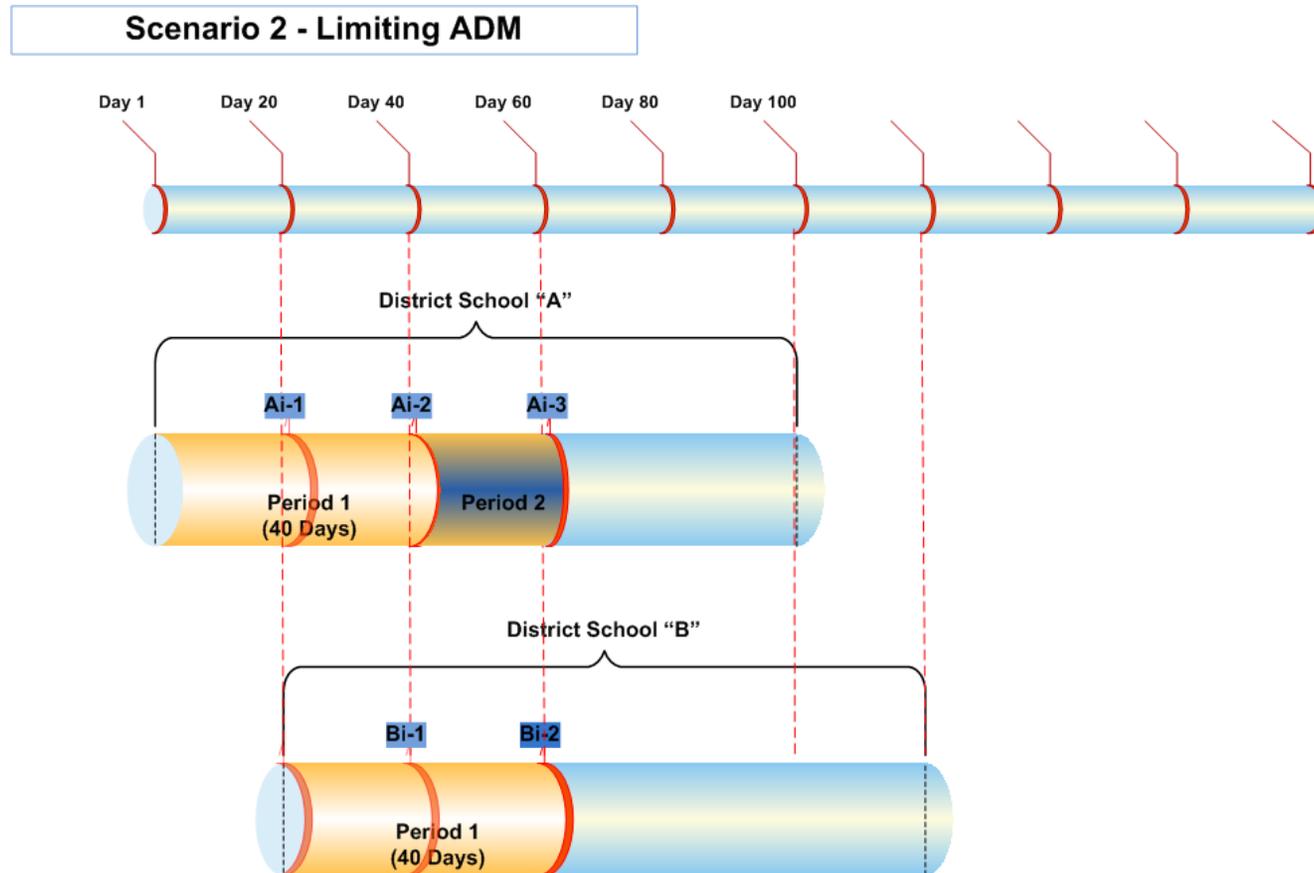


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	Period	Intervals	Raw Membership Days	FY 09 (Existing)		FY 10 (Phase I)	
				Concurrency Module	Limiting Module	Concurrency Module (No Change)	Limiting Module
District School "A"	Period 1 (40 Days)	Ai-1	20.0	20.0	20.0	20.0	10.0
		Ai-2	20.0	20.0	20.0	20.0	10.0
District School "B"	Period 1 (40 Days)	Bi-1	20.0	20.0	20.0	20.0	10.0
		Bi-2	20.0	20.0	20.0	20.0	10.0
Period 1 Subtotal			80.0	80.0	80.0	80.0	40.0
District School "A"	Period 2 (60 Days)	Ai-3	20.0	20.0	20.0	20.0	10.0
		Ai-4	40.0	40.0	40.0	40.0	20.0
District School "B"	Period 2 (60 Days)	Bi-3	40.0	40.0	40.0	40.0	20.0
		Bi-4	20.0	20.0	20.0	20.0	10.0
Period 2 Subtotal			120.0	120.0	120.0	120.0	60.0
Total			200.0	200.0	200.0	200.0	100.0

Figure 2: Scenario 2

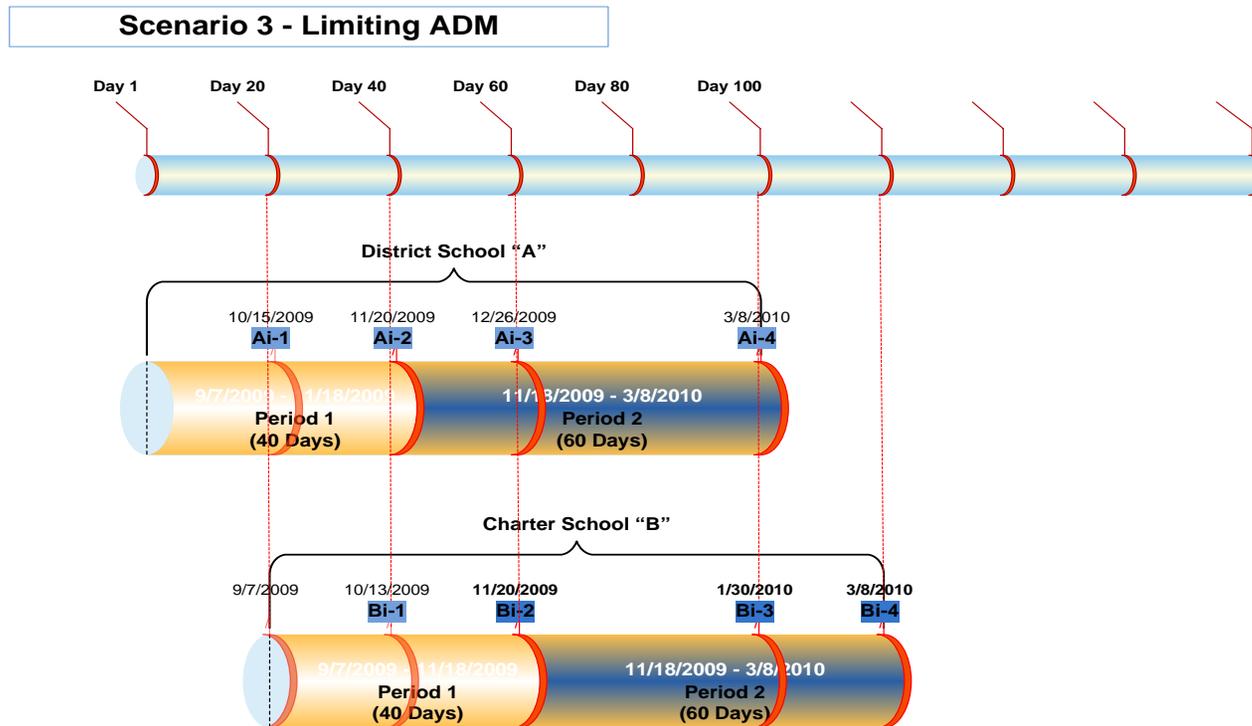


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	Period	Intervals	Raw Membership Days	FY 09 (Existing)		FY 10 (Phase I)	
				Concurrency Module	Limiting Module	Concurrency Module (No Change)	Limiting Module
District School "A"	Period 1 (40 Days)	Ai-1	20	20	20	20	20
		Ai-2	20	20	20	20	20
District School "B"	Period 1 (40 Days)	Bi-1	20	20	20	20	20
		Bi-2	20	20	20	20	20
Period 1 Subtotal			80	80	80	80	80
District School "A"	Period 2 (60 Days)	Ai-3	20	20	20	20	20
		Ai-4					
District School "B"	Period 2 (60 Days)	Bi-3					
		Bi-4					
Period 2 Subtotal			20	20	20	20	20
Total			100	100	100	100	100

Figure 3: Scenario 3

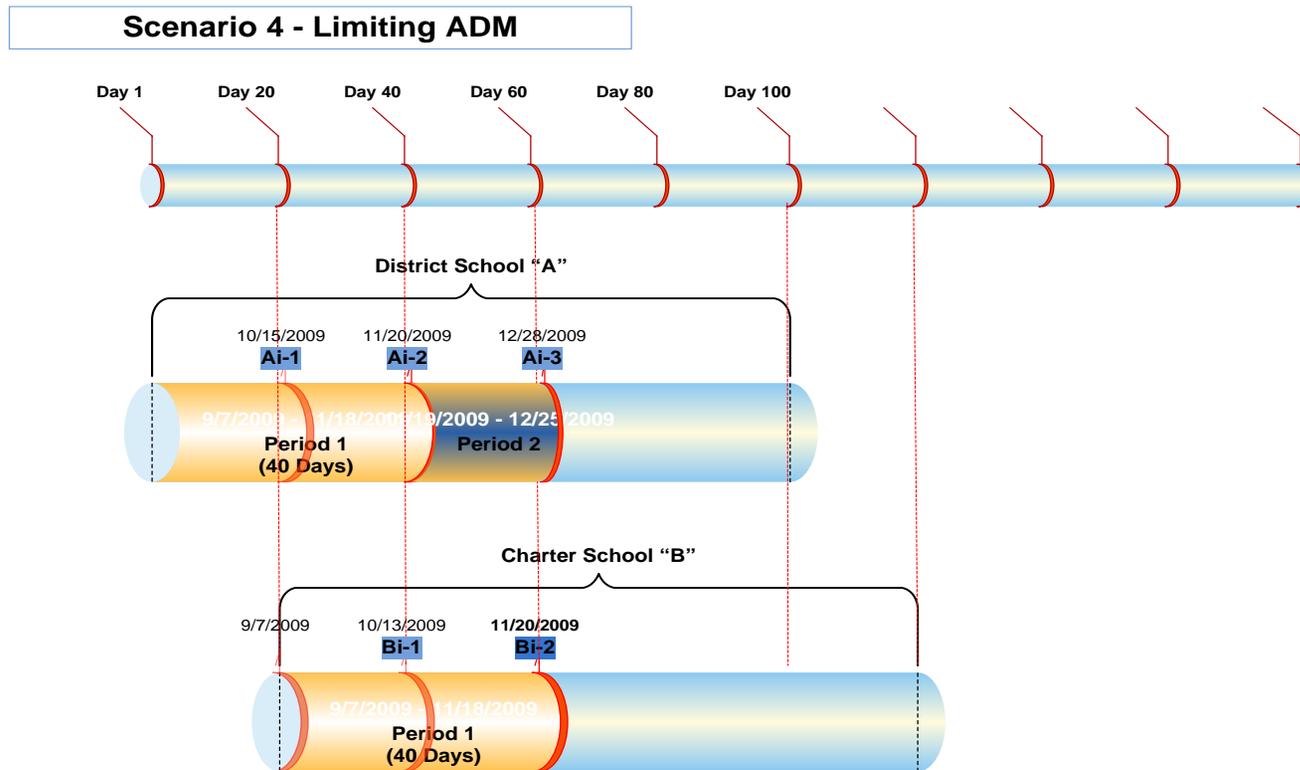


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	Period	Intervals	Raw Membership Days	FY 09 (Existing)		FY 10 (Phase I)	
				Concurrency Module	Limiting Module	Concurrency Module (No Change)	Limiting Module
District School "A"	Period 1 (40 Days)	Ai-1	20.0	20.0	16	20.0	16.7
		Ai-2	20.0	10	8	10	8.3
Charter School "B"	Period 1 (40 Days)	Bi-1	20.0	10	8	10	8.3
		Bi-2	20.0	10	8	10	8.3
Period 1 Subtotal			80.0	50	40	50	41.7
District School "A"	Period 2 (60 Days)	Ai-3	20.0	10.0	8.5714	10.0	8.3
		Ai-4	40.0	20.0	17.1428	20.0	16.7
Charter School "B"	Period 2 (60 Days)	Bi-3	40.0	20.0	17.1428	20.0	16.7
		Bi-4	20.0	20.0	17.1428	20.0	16.7
Period 2 Subtotal			120.0	70	59.9998	70	58.3
Total			200.0	120	99.9998	120	100.0

Figure 4: Scenario 4



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	Period	Intervals	Raw Membership Days	FY 09 (Existing)		FY 10 (Phase I)	
				Concurrency Module	Limiting Module	Concurrency Module (No Change)	Limiting Module
District School "A"	Period 1 (40 Days)	Ai-1	20	20	16	20	20
		Ai-2	20	10	8	10	10
Charter School "B"	Period 1 (40 Days)	Bi-1	20	10	8	10	10
		Bi-2	20	10	8	10	10
Period 1 Subtotal			80	50	40	50	50
District School "A"	Period 2 (60 Days)	Ai-3	20	10	10	10	10
		Ai-4					
Charter School "B"	Period 2 (60 Days)	Bi-3					
		Bi-4					
Period 2 Subtotal			20	10	10	10	10
Total			100	60	50	60	60

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3 CONCURRENCY BUSINESS REQUIREMENTS

The 8 calculation rules described below shall be the Concurrency Calculation Rules requirements for FY 2010. All rules apply at all times and are not sequential in order so each can be applied discriminately at any time during the concurrency Calculation. The calculation rules are defined in statutes [ARS 15-185 \(C\)](#) and [ARS 15-393\(D\)\(3\)](#).

The FY 2010 Concurrency rules apply to the following situations described below.

- District / Charter enrollment overlaps.
- JTED Satellite and member District enrollment overlaps.

3.1 Rule 1 - Enrollment Validation

- a) All memberships shall be considered valid upon submission.
- b) The System will ignore the concurrency validation flag.
- c) Concurrency Validation shall no longer be available to LEA's for FY 2010 and forward.

3.2 Rule 2 – Submitted FTE

- a) In no case will any adjusted FTE exceed the submitted FTE.

3.3 Rule 3 – Invalidated Memberships (may be deferred or removed as covered in other project requirements)

- a) ADE School Finance shall have the ability to invalidate any enrollments (concurrent or non-concurrent) that have been determined to be invalid through the School Finance membership dispute process.
- b) The system shall give LEA's the ability to review the invalidation of any enrollments.
- c) The system shall exclude any invalidated memberships.

3.4 Rule 4 – AOI Memberships

- a) Exclude all AOI memberships from concurrency membership processing. (AOI to be handled by the Limiting Module).

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3.5 Rule 5 – Non-Fundable JTED Satellite

- a) If a JTED satellite membership overlaps with only non-member District memberships the FTE of the JTED Satellite membership shall be adjusted to 0 during the overlap. (JTED /Charter overlap will not to be included in the concurrency calculation and will be handled by the limiting module)

3.6 Rule 6 – JTED Satellite

- a) If there is an overlap of JTED satellite memberships and resident member District memberships then the sum of FTE for all non-JTED satellite memberships during the period of overlap shall be proportionally limited to 1.0
- b) Any overlapping JTED Satellite membership shall have its FTE limited to the remainder of 1.25 minus the sum of the FTE of the non-JTED satellite memberships during the overlap.

3.7 Rule 7 – District / Charter

- a) If there is no JTED Satellite membership in the overlaps and there is a District membership that overlaps a Charter membership, then the sum of the FTE for all of the non-JTED Mains during the overlap shall be proportionally limited to 1.0.

3.8 Rule 8 – 100 day Memberships

- a) Concurrency module shall process the first 100 membership days of the calendar track.

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Appendix A - Definition of Concurrency Terms / Glossary

ADE	Arizona Department of Education
ADM	Average Daily Membership
Charter	A public school established by contract with a district Governing Board, the State Board of Education or the State Board for Charter Schools to provide learning that will improve pupil achievement.
Charter holder	The administrative entity that holds the contract and may have one or more charter schools.
DOA	District of Attendance
DOR	District of Residence
FTE	Full Time Equivalency - Percentage maximum that a student can be accounted for each school day
JTED	Joint Technological Education District (are formed when two or more adjoining school districts (with the approval of local voters and the state Department of Education) come together to form a new district that can deliver a higher level of career and technology training to the students it serves than the individual districts could provide on their own.)
JTED Main	A JTED Main campus is usually located with the JTED district administrative office, but may be located anywhere but a member district (school) campus. A JTED Central campus is equivalent to a JTED Main campus, but is usually located central to the member district campuses. A JTED Main or Central campus can only be identified by the fact that it isn't a JTED Satellite campus but is owned by a JTED. Any student that lives in a member district may attend a

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	JTED Main or Central campus.
JTED Satellite	A JTED Satellite campus is a facility (school) where instruction takes place. It is located on a member district (school) campus. A JTED Satellite has a “JTED Satellite” dependency to a member district. Any student living in a member district may attend any JTED Satellite campus located at any school in the member district.
LEA	Local Educational Agency
Member District	A school district that is encompassed by a JTED. A JTED is composed of member districts that each have agreements to allow JTED Satellite campuses to be located on schools in the member districts.
Non-member District	A school district that isn’t encompassed by the JTED and doesn’t have any Satellite campuses at any of its schools that belong to the JTED.
Non-resident member District	A term used to indicate that the student doesn’t live (isn’t a resident) in the member district.
Resident Member District	A term used to indicate that the student lives (is resident) in the member district.

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Appendix B – Concurrency Scenarios

Scenarios that can be applied to the business requirements section may be found in the [ConcurrencyBusinessRulesFY10](#) document. Refer to the Method #1 calculation.

Additional Scenarios:

Legend:		
	D = non-JTED District school or non-Member District school	
	C = Charter school	
	JM = JTED Main	
	JS = JTED Satellite (not in classic combo)	
	MD / JSC = JTED Satellite (classic combo)	
	/ = overlapping enrollments	
	+ = subsequent enrollment	
	n = (number) when more than 1 enrollment in a school type as listed above	
Assumptions:		
	memberships are within the first 100 days of calendar track	
	no invalidated or AOI schools memberships	
Case #	Scenarios	Expected Results
1	D / JM	Full FTE each enrollment
2	C / JM	Full FTE each enrollment
3	D + C / JM	Full FTE each enrollment
4	C + D / JM	Full FTE each enrollment
5	D / C + JM	D & C proportionally limit to 1.0 ; JM gets full FTE
6	D / C / JM	D & C proportionally limit to 1.0 ; JM gets full FTE
7	D1 / C + D2 / JM	D1 & C proportionally limit to 1.0; D2 and JM gets full FTE
8	D / C1 + C2 / JM	D & C1 proportionally limit to 1.0; C2 and JM gets full FTE
9	MD / JSC / JM	MD & JM proportionally limit to 1.0 ; JSC remainder of 1.25 not to exceed submitted

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		FTE
10	MD / JSC / C / JM	MD & C & JM proportionally limit to 1.0 ; JSC remainder of 1.25 not to exceed submitted FTE
11	MD / JSC + C	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; C gets full FTE
12	MD / JSC + JM	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; JM gets full FTE
13	JS + JM	Full FTE each enrollment
14	MD / JSC + JS / C	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; JS & C gets full FTE
15	MD / JSC + C1 / C2	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; C1 & C2 gets full FTE
16	MD / JSC + D / JM	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; D & JM gets full FTE
17	MD / (JSC1 + JSC2)	Scenario 17 appears to be really 2 separate overlaps, MD/JSC1 and then MD/JSC2. Rule 6 would apply and MD gets the full FTE. JSC1 would get the remainder of 1.25 for the portion of its overlap. JSC2 would get the remainder of 1.25 for the portion of its overlap. Another scenario (17b) which may be what you are looking for is.. MD/JSC1/JSC2. A student is attending a member district and is also attending 2 other satellite courses in different schools but the same member district. In that case MD gets the full FTE and

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		both JSC1 and JSC2 would proportionally split the remainder of the 1.25 not to exceed the submitted FTE.
18	MD / JSC / JS	MD gets the full FTE; JSC gets the remainder of the 1.25 not to exceed the submitted FTE (Rule 6). JS gets nothing (rule 5)
19	MD / JSC + D + JM	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; D & JM gets full FTE
20	MD / JSC + C + JM	MD gets full FTE; JSC remainder of 1.25 - MD FTE not to exceed submitted FTE; C & JM gets full FTE