

# Legislative Class Size: Global Reporting Logic, Extract Editor Workflow, Official Submission Workflow, & Special Population Logic FRD

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## Summary

The Legislative Class Size Collection (LCS) is a series of reports based on the state's class size requirements. The LCS reports are completed twice a year through the SIS and are for all grade levels. LCS reports are based on data snapshots on the last day of October and the last day of February.

### Due Dates

- The Fall snapshot is taken October 31.
- The Spring snapshot is taken the last day of February.

### Scope and Purpose

The reports are required by N.C.G.S. 115C-301(f) [https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter\\_115C/GS\\_115C-301.pdf](https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-301.pdf)

The goal of the report is to monitor compliance with the above statute. We need to know the number of students in each section of standard ELA K-8 at each school in the state and which specific classrooms are in violation of the requirements.

Biannual Reports. – At the end of October and end of February of each school year, each local board of education shall file a report for each school within the local school administrative unit. The report shall include the organization for each school in the local school administrative unit, including the following information:

1. For each class in each grade level (K-13) at each school, the following:
  - a. The duties of the teacher.
  - b. The number of students assigned to the class, including all exceptions to individual class size maximums in kindergarten through third grade that exist at that time.
2. For each school, the number of program enhancement teachers.
3. The average class size for each grade (K-3) in the local school administrative unit.

\*\* Note: The average class size by district or school is not currently calculated. Exempt schools and classroom types are subject to frequent change by factors including legislative requirements and school status. \*\*

\*\* Note 2: All schools are required to report. Many schools are exempt from the requirements, but they must still submit the report. \*\*

## Functional Requirements

### Global Reporting Population and Business Rules for ALL LCS Reports

#	Requirement
1	Reports can be accessed at both the District Edition and State Edition.
2	Only single school selection is allowed from the extract editor for Official report <u>generation, review, and submission</u> . Qualifying Official reports can be identified by having a 'Snapshot Period' EQUAL to 'Fall' or 'Spring'.
3	Multiple districts and schools can be selected from the extract editor under the following conditions:
3.1	District Edition: <ol style="list-style-type: none"> <li>When 'Snapshot Period' EQUALS 'Unofficial,' multiple schools can be selected from the extract editor for report <u>generation</u> only.</li> <li>When 'Snapshot Period' EQUALS 'Fall' or 'Spring', multiple schools can be selected from the extract editor for report <u>review</u> of previously generated and/or submitted reports for the selected Snapshot Period.</li> </ol>
3.2	State Edition: <ol style="list-style-type: none"> <li>Multiple districts and schools can be selected from the extract editor for submission <u>review</u>.</li> </ol>
4	LCS reports will display data for Reportable Sections. Determination of Reportable Sections are based on the below criteria as of the Effective Date specified in the Extract Editor.
4.1	A Reportable Section must be active.
4.2	A Reportable Section must have rostered students.
4.3	A Reportable Section must have a valid State Course Code.
4.4	Reportable Sections vary across Report Types according to State Course Codes.
4.5	A section is considered Reportable regardless of there being an assigned Qualifying Lead Teacher.
5	To be included in report counts, students must meet the following requirements as of the Effective Date specified in the Extract Editor.
5.1	Student has a valid State Student ID.
5.2	The student must have at least one active enrollment at the selected school and cannot be marked as 'No Show' or 'State Exclude' for that enrollment.
5.3	The student is not enrolled in a grade level that is marked State Exclude.
5.4	The student's enrollment is not tied to a Calendar that is marked State Exclude.

5.5	The student is actively rostered in the identified Reportable Section and did not exit prior to or start after the indicated Effective Date.
6	While Qualifying Lead Teachers are not required for section and student data to be reported, the following criteria must be met to be considered a <b>Qualifying Lead Teacher</b> as of the Effective Date specified in the Extract Editor.
6.1	The teacher has a valid Staff State ID.
6.2	The teacher is active on the identified Reportable Section and did not exit prior to or start after the indicated Effective Date.
6.3	The teacher is marked as a Primary Teacher on Section Staff History (dbo.SectionStaffHistory.staffType = P) OR The teacher is marked as a Teacher or Section Staff on Section Staff History (dbo.SectionStaffHistory.staffType = T OR SS) AND they are assigned one of the following roles: <ul style="list-style-type: none"> <li>• TOR: Teacher of Record</li> <li>• SLT: Secondary Lead Teacher</li> </ul>
7	For LCS Reports that display 1 Qualifying Lead Teacher per Reportable Section (regardless of the total number of Qualifying Lead Teachers), the below logic is used to determine which Qualifying Lead Teacher is chosen to display as the <b>Reportable Lead Teacher</b> .
7.1	The teacher meets all requirements to be considered a Qualifying Lead Teacher (#6 - 6.2)
7.2	A teacher marked as a Primary Teacher on Section Staff History (dbo.SectionStaffHistory.staffType = P) will always be the Reportable Lead Teacher.
7.3	IF no Primary Teacher exists on Section Staff History (dbo.SectionStaffHistory.staffType = P), THEN a Teacher or Section Staff on Section Staff History (dbo.SectionStaffHistory.staffType = T OR SS) will display as a Reportable Lead Teacher IF they are assigned one of the following roles (dbo.SectionStaffHistory.role): <ul style="list-style-type: none"> <li>• TOR: Teacher of Record</li> <li>• SLT: Secondary Lead Teacher</li> </ul>
7.4	IF multiple staff meet the criteria in 7.3 BUT they have different roles, then the Reportable Lead Teacher will be the staff member with the role of TOR: Teacher of Record (dbo.SectionStaffHistory.role).
7.5	IF multiple staff meet the criteria in 7.3 AND they have the same roles (dbo.SectionStaffHistory.role), then the teacher with the most recent start date (dbo.SectionStaffHistory.startDate) will be the Reportable Lead Teacher.
8	Schools with the following State School Number criteria do NOT report.
8.1	Schools with a State School Number = 000-299 and 996-999



9	Class records, including Teacher and Student details, are reported to the School of Instruction selected in the Extract Editor. For teachers assigned to multiple schools, only the classes located at the selected school will be reported.
10	All LCS reports include courses regardless of the following settings:
10.1	The Active checkbox (dbo.Course.active) on the Course Information screen is NOT selected.
10.2	The State Report Exclude (dbo.Course.stateReportExclude) checkbox is NOT selected. <i>NOTE: this field is NOT enabled in the UI at this time.</i>
11	Reports can be generated and reviewed for Active and Prior School Years.
12	Reports can be generated in CSV or HTML file formats.

### Extract Editor Requirements

UI Path: Reporting > NC State Reporting > NC Legislative Class Size Collections (LCS)

**Note:** The availability of Extract Editor options depends on several factors:

- The number of Districts or Schools selected
- The Report Type
- The Snapshot Period
- Whether the tool is being used in the District or State Edition

Because of these conditions, not all Extract Editor options will be available for selection at all times. For detailed information on which options are available under specific conditions, please refer to the Extract Editor Selection Criteria by Report Type & Snapshot Period section below.

	Editor Options	Field Type	Requirements
<b>Instructions</b>			
1	N/A	N/A	The Legislative Class Size Collection is a series of biannual reports collected as of a snapshot date at the end of October and the end of February every school year. Due to the amount of data included in these reports, it is recommended to use Batch Queue functionality to generate them.  See the <a href="#">NC LCS Collection Article</a> for more information.
<b>Setup</b>			
2	Search Calendars	Calendar Selector	This allows the user to narrow calendar results based on input text.
3	Show Active Year Only	On-Off Toggle	When toggled 'ON', only active year calendars will display.
5	Expand All	Button	Once selected, all calendars will display based on selection criteria.
6	Collapse All	Button	Once selected, all calendars will collapse to the School Year level.
7	>	Tree Structure	
8	YY - YY	Checkbox	This will show the school year selected from the 'Select a School Year' drop-list
9	List of Calendars	Checkbox options	Any calendar that exists within the selected school year will display in alpha order.
<b>Report Options</b>			

10	Report Type	Drop-list	<p>A required input with the following options:</p> <ul style="list-style-type: none"> <li>• Class Size</li> <li>• Class Size Violations</li> <li>• Class Size Average</li> <li>• Program Enhancement Teachers</li> </ul>
11	Snapshot Period	Drop-list	<p>A required input with drop-list values dependent upon user selected 'Report Type'. The drop-list can include the following options:</p> <ul style="list-style-type: none"> <li>• Unofficial <ul style="list-style-type: none"> <li>◦ Selecting this option allows the user to spot-check data between official reporting periods.</li> </ul> </li> <li>• Fall <ul style="list-style-type: none"> <li>◦ If the user selects this option, the report will generate data based on an Effective Date of the last day in October.</li> </ul> </li> <li>• Spring <ul style="list-style-type: none"> <li>◦ If the user selects this option, the report will generate data based on an Effective Date of the last day in February</li> </ul> </li> </ul>
12	Grade Level Grouping	Drop-list	<p>A required input with drop-list values dependent upon user selected 'Report Type' and 'Snapshot Period'. The drop-list can include the following options:</p> <ul style="list-style-type: none"> <li>• K - 3</li> <li>• 4 - 8</li> <li>• K - 13</li> </ul>
13	Violation Type	Drop-list	<p>A required input only available with the user selected 'Report Type' of 'Class Size Violations'. Drop-list options include:</p> <ul style="list-style-type: none"> <li>• Over the Individual Class Size Maximum</li> <li>• Over the PSU-wide Maximum Average</li> </ul>
14	Only Return Classes with 0 students	Checkbox	<p>This option is only available when the user selects a 'Report Type' of 'Class Size', 'Class Size Average', or ' Program Enhancement Teachers, and the 'Reporting Period' is selected as 'Unofficial'.</p> <p>If selected, this option will limit generated data to displaying classes with no students actively rostered in the section as of the user input 'Effective Date.'</p>

15	Effective Date	Date-picker	<p>A required input with the following options:</p> <ul style="list-style-type: none"> <li>• If a 'Snapshot Period' of 'Unofficial' is selected, the 'Effective Date' can be modified by the user.</li> <li>• If a 'Snapshot Period' of 'Fall' is selected, the 'Effective Date' will become Read Only and default to October 31st.</li> <li>• If a 'Snapshot Period' of 'Spring' is selected, the 'Effective Date' will become Read Only and default to the last day of February.</li> </ul> <p>Generated data will include counts of students actively rostered in a course with teachers actively assigned as the section's teacher as of the indicated 'Effective Date.'</p>
<b>Output Options</b>			
16	Report Processing - Generate Now	Radio Button	Selecting this option will generate the report extract immediately.
17	Report Processing - Submit to Batch Queue	Radio Button	Selecting this option will submit the report to the batch queue to be run on the date and time indicated by the user.
18	Format Type - HTML	Radio Button	Report output format will be via an HTML table in a new browser window.
19	Format Type - CSV	Radio Button	Report output format will be a CSV file.
20	Queue Options - High Priority	Checkbox	This option is only available when the user selects Report Processing - Submit to Batch Queue.
21	Queue Options - Keep Until I Delete	Checkbox	This option is only available when the user selects Report Processing - Submit to Batch Queue.
22	Queue Start Date and Time	Date and Time picker	This option is only available when the user selects Report Processing - Submit to Batch Queue.
<b>Batch Queue Results</b>			
23	Start Date	Date picker	When a date is selected, the Queued Reports Table will display a list of queued reports with a queued time beginning on or after the indicated date.
24	End Date	Date picker	When a date is selected, the Queued Reports Table will display a list of queued reports with a queued time ending on or before the indicated date.
25	Queued Reports Table	Display Table	This table displays any LCS reports that were indicated to be submitted via the Batch Queue.
26	Refresh	Button	When selected, the Queued Reports Table refreshes the displayed results.
<b>Action Bar</b>			



27	Generate	Button	When selected, an LCS report extract will generate based on the user provided inputs.
28	Review	Button	This option is only available when the user selects a 'Reporting Period' of 'Fall' or 'Spring.' Once selected, a DIS Snapshot is taken based on user provided inputs. Users are asked to review the generated file for data accuracy prior to submission.
29	Submit Verification	Button	<p>This option is only available when the user selects a 'Reporting Period' of 'Fall' or 'Spring.' After review of the DIS Snapshot data, selecting 'Submit Verification' will send the data to the State for review.</p> <p><i>NOTE: Only one file per Snapshot (Year)/Reporting Period selected is allowed. Should a mistake be made - the district must contact the state for the state to clear the queue.</i></p>

**Extract Editor Selection Criteria by Report Type & Snapshot Period**

The below tables outline the conditions in which Extract Editor options are available.

**District Edition Options**

Report Type	Snapshot Period	Grade Level Grouping	Violation Type	Extra Options	Effective Date	Action Bar Options
Class Size	Unofficial	<ul style="list-style-type: none"> <li>• K-3</li> <li>• 4-8</li> <li>• K-13</li> </ul>	N/A	Only Return Classes with 0 students	User selection	Generate
	Fall	K-13	N/A	N/A	Defaults to October 31st of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>
	Spring	K-13	N/A	N/A	Defaults to the last day in February of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>
Class Size Violations	Unofficial	K-3	<ul style="list-style-type: none"> <li>• Over the Individual Class Size Maximum</li> <li>• Over the PSU-wide Maximum Average</li> </ul>	N/A	User selection	Generate
Class Size Average	Unofficial	<ul style="list-style-type: none"> <li>• K-3</li> <li>• 4-8</li> </ul>	N/A	Only Return Classes with 0 students	User selection	Generate
	Fall	K-3	N/A	N/A	Defaults to October 31st of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>
	Spring	K-3	N/A	N/A	Defaults to the last day in February of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>

Program Enhancement Teachers	Unofficial	K-13	N/A	Only Return Classes with 0 students	User selection	Generate
	Fall	K-13	N/A	N/A	Defaults to October 31st of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>
	Spring	K-13	N/A	N/A	Defaults to the last day in February of the selected school year.	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Review</li> <li>• Submit Verification</li> </ul>

State Edition Options

Report Type	Period	Grade Level Grouping	Action Bar Options
Class Size	Fall	K-13	Review
	Spring	K-13	Review
Class Size Average	Fall	K-3	Review
	Spring	K-3	Review
Program Enhancement Teachers	Fall	K-13	Review
	Spring	K-13	Review

## Official Report Submission Workflow

Official LCS reports must follow a designated workflow in order to be accepted by the State. The steps in this submission workflow are outlined below.

### 1. Generate

- a. Select either Fall or Spring as the Snapshot Period, then click the Generate button in the Action Bar of the Extract Editor.
- b. This step creates a temporary snapshot of the current data, allowing users to review it before submission.
- c. If any data issues are identified, make the necessary corrections and click Generate again to refresh the snapshot.
- d. The Generated By and Generated Time columns will populate during this phase.

### 2. Review

- a. After generating the report and making any needed corrections, click the Review button in the Action Bar.
- b. Ensure that the same Extract Editor selections are used as in the Generate phase.
- c. The Review step pulls data from the most recent snapshot and provides a final opportunity to verify accuracy before submission.
- d. The Verified By and Verified Time columns will populate during this phase.
- e. **Important:** Any changes made to enrollment or attendance data after the Generate step will **not** be reflected in the Review phase.

### 3. Submit Verification

- a. Once the Review is complete, click the Submit Verification button in the Action Bar to submit the official LCS report.
- b. Again, ensure the same Extract Editor selections are maintained.
- c. A confirmation message will appear:
  - i. **"Warning! Once verification is submitted, it is final.** You will not be able to make any changes after submission. Any addendums must go through NC DPI."
- d. Click Submit to send the report snapshot to the State, or Cancel to exit the submission process.
- e. After submission:
  - i. The unique School + Report Type + Snapshot Period can no longer be regenerated or re-submitted.
  - ii. Users may continue to review the submitted data, but updates to student records will not be reflected in future reviews.
  - iii. The Submitted column will now display a value of '1' to indicate that the submission workflow has been successfully completed.

## Tool Rights

Tool Rights Path: Reporting > NC State Reporting > LCS Extract > LCS Extract Submission

The additional Tool Rights, listed above, are necessary for completing following actions:

1. **District Edition Users:** submitting an official LCS report via the Official Submission Workflow
2. **State Edition Users:** reviewing official LCS reports that have been submitted following the Official Submission Workflow

## Error Messages

E #	Condition	Requirement	Message	Impacted LCS Reports
1	Selecting the 'Generate' button after an official report submission has been completed.	After official submission of a report, the report can no longer be re-generated.	"A <Official Report Name> snapshot has been submitted for this period. Generation is no longer available. <School Name> + <Snapshot Period> + <Snapshot Year>."	1. K-13 Class Size Report 2. K-3 Class Size Average Report 3. K-13 Program Enhancement Teachers Report
2	Selecting the 'Review' button after generating a report that returned 0 results for an official submission.	Report results are required to have at least 1 returned record in order to complete the official submission process.	"No <Official Report Name> snapshot is available for School: <School Name> + <Snapshot Period> + <Snapshot Year>."	
3	Selecting the 'Submit Verification' button after generating a report that returned 0 results for an official submission.	Report results are required to have at least 1 returned record in order to complete the official submission process.	"No records to submit, please Generate the <Official Report Name> report first. <School Name> + <Snapshot Period> + <Snapshot Year>."	
4	Selecting the 'Submit Verification' button after completing the official submission process for the selected School + Report Type + Snapshot Period.	After an official report submission, no additional official submissions are allowed for the selected School + Report Type + Snapshot Period.	"Error: You are attempting to submit a report that has already been finalized. <School Name> + <Snapshot Period> + <Snapshot Year>."	
5	<b>State Level Error:</b>  Attempting to 'Review' official submissions.	<b>State Level Error:</b>  An error will return for any selected School + Report Type + Snapshot Period that has not completed the official submission process.	<b>State Level Error:</b>  "No <Official Report Name> snapshot is available for School: <School Name> + <Snapshot Period> + <Snapshot Year>."	

### Special Reporting Population Logic

If course sections meet the criteria for all three special reporting population logics, they will be applied in the following order:

1. Dual Language Immersion
2. Pull-out Sections
3. Combined Classes

#### Dual Language Immersion

<p><b>Functional Requirements</b></p>	<p><b>Dual Language Immersion Logic</b></p> <p><b>NOTE:</b> This logic applies only to reports where the Grade Level Group is K–3. The specific reports affected are:</p> <ul style="list-style-type: none"> <li>• Class Size</li> <li>• Class Size Average</li> <li>• Class Size Violations</li> </ul> <p>North Carolina identifies Dual Language Immersion classes using following criteria:</p> <ol style="list-style-type: none"> <li>1. Dual language immersion classes are classes in which:             <ol style="list-style-type: none"> <li>a. at least one-third of the students' dominant language is English, and</li> <li>b. instruction involves both English and a target foreign language with a minimum of fifty percent (50%) of core content taught in the target foreign language to promote dual language proficiency for all students.</li> </ol> </li> </ol> <p>Currently, there is no automated logic to identify whether a class section meets this criteria. It is the sole responsibility of the PSU to manually indicate this by selecting the appropriate value from the 'Instructional Provider' drop-list within Section Information. Sections designated as Dual Language Immersion are not considered reportable and should be excluded from all reporting.</p>
<p><b>Business Rules</b></p>	<p><b>Dual Language Immersion Logic</b></p> <p>Sections will be excluded from reporting if <code>dbo.Section.providerSchoolOverride = 20: Dual Language Immersion</code>.</p>
<p><b>Example</b></p>	

Pull-out Sections

Functional Requirements	Pull-out Section Logic
	<p><b>NOTE:</b> This logic applies to <b>ALL</b> reports with Grade Level Groupings of K-3 or 4-8. It does not apply to the following reports:</p> <ul style="list-style-type: none"> <li>• K-13 Class Size Report</li> <li>• K-13 Program Enhancement Teachers Report</li> </ul> <p>Under standard reporting, each distinct reportable section typically generates one record. With Pull-Out Logic, multiple sections attached to the same course will be reported as a single record if the below criteria is met.</p> <ul style="list-style-type: none"> <li>• <u>Standard Class Sections:</u> The Section Number can contain UP TO 3-digits</li> <li>• <u>Pull-Out Sections:</u> Can be identified by having the same CourseID number as the Standard Class Section with the following number formatting and characteristics:               <ul style="list-style-type: none"> <li>◦ A "1" is added in the thousands place before the section number of the Standard Class Section.</li> <li>◦ This creates a 4-digit Section Number for the Pull-Out class.</li> <li>◦ Both sections <b>MUST</b> have the <b>SAME Primary Teacher</b> (dbo.SectionStaffHistory.staffType = P) as of the Effective Date from the Extract Editor.</li> </ul> </li> </ul> <p>Upon identifying a Pull-out section, the following Business Rules must be followed for LCS Reporting.</p>



Business Rules

Pull-out Section Logic

#	Business Rules
1	For a standard course section number XYZ and its corresponding pull-out section number 1XYZ, group the standard course section and the pull-out section into 1 reportable section. The reportable section will keep the following characteristics:
1.1	The resulting record will inherit the Section Number, Trial, Term, and Period Set from the standard course section (XYZ).
1.2	The Reportable Lead Teacher will be the same between both the standard course section and the pull-out section, and will only ever be a Primary Teacher (dbo.SectionStaffHistory.staffType = P).
1.3	All unique Qualifying Lead Teachers from the standard course section will be included in the TeacherCount. Other than the Reportable Lead Teacher from the pull-out section, any other Qualifying Lead Teachers assigned to the pull-out section will be excluded from the TeacherCount.
1.4	All students between the two sections will be summed to determine the StudentCount. This number will be a straight sum between the two sections and NOT a unique count of students.
2	If a course section 1XYZ does NOT have a corresponding standard section XYZ, then 1XYZ will be considered its own unique reportable section.
3	If one section—either the standard section (XYZ) or the pull-out section (1XYZ)—has students rostered while the other does not, the records will not be grouped together and treated as separate standard course sections.
3.1	The section <b>with</b> students would be the only one reported.
3.2	The section without students would display when the "Only 0 Student Rosters" option is selected from the Extract Editor.

Example

**Pull-out Section Logic**

Standard Section Number: 101

1. Reportable Lead Teacher = A. Anderson
  - a. dbo.SectionStaffHistory.staffType = P
2. Term: Q1 - Q4
3. Period: 13
4. Student Count = 15

Pull-out Section Number = 1101

1. Reportable Lead Teacher = A. Anderson
  - a. dbo.SectionStaffHistory.staffType = P
2. Qualifying Lead Teacher = J. Jones
3. Term: Q1 - Q4
4. Period: 13
5. Student Count = 5

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For the Class Size Report, **Resulting Reportable Section Number:** 101

1. Reportable Lead Teacher = A. Anderson
  - a. dbo.SectionStaffHistory.staffType = P
2. Term: Q1 - Q4
3. Period: 13
4. Student Count = 20
5. Teacher Count = 1

Combined Classes

**Functional Requirements**

**Combined Classes Logic**

**NOTE:** This logic applies only to reports with Grade Level Groupings of K-3 or 4-8. It does not apply to the following reports:

- K-13 Class Size Report
- K-13 Program Enhancement Teachers Report

Under standard reporting, each distinct reportable section typically generates one record. With Combined Class Logic, any **matching** sections across different state course codes will be reported as a single record. To identify course sections as Combined Classes, **ALL** of the following criteria must be met:

- State Course Code must be one of the following:
  - Grades K-3: 10502Z0, 10512Z0, 10522Z0, or 10532Z0
  - Grades 4-8: 10542Z0, 10552Z0, 10562Y0, 10572Y0, or 10582Y0
- Sections **MUST**:
  - Have the same section number
  - Have the same Primary Teacher (dbo.SectionStaffHistory.staffType = P)
    - teacher personID
  - Be scheduled identically:
    - For the same Term(s)
    - During the same Period(s)
    - With the same trialID

Upon identifying a Combined Class, the following Business Rules must be followed for LCS Reporting.



**Business Rules**

**Combined Classes Logic**

#	Business Rules
1	For a course section (Ex. Course = ELA 5, Section = ABC) and its matching Combined Class (Ex. Course = ELA 6, Section = ABC), group the two course sections into 1 reportable section. The reportable section will be determined in the following manner:  <b>NOTE:</b> The logic used to determine the reportable section is similar to the logic used for the ClassGradeLevel field on the Class Size Report.
1.1	Identify and report the section that has the highest number of rostered students by grade level, as of the Effective Date selected from the Extract Editor.
1.2	If matching sections have the same number of rostered students but at different grade levels, the reportable section will be the section with the students at the lower grade level.
1.3	For Combined classes scheduled across Grade Level Groupings K-3 and 4-8, standard Combo logic applies. After the combination process, the resulting reportable section will appear on the report with the Grade Level Grouping that matches the ClassGradeLevel created by the combination.
2	The reportable section will have the following characteristics:
2.1	The resulting reported record will inherit the State Course Code, Section, Trial, Term, and Period Set from the identified reportable section.
2.2	The Reportable Lead Teacher will be the same between the matching sections, and will only ever be a Primary Teacher (dbo.SectionStaffHistory.staffType = P).
2.3	All unique Qualifying Lead Teachers between the matching sections will be included in the TeacherCount.
2.4	All students between the matching sections will be summed to determine the StudentCount. This number will be a straight and NOT a unique count of students.
3	If one matching section (Ex. Either ELA 5, ABC or ELA 6, ABC) has students rostered while the other does not, the records will not be grouped together.
3.1	The section <b>with</b> students would be the only one reported.
3.2	The section without student would display when the "Only 0 Student Rosters" option is selected from the Extract Editor.

**Example**

**Combined Classes Logic**

Matching Section Number: 101

1. State Course Code: 10502Z0 (ELA 3)
2. Primary Teacher = A. Anderson
  - a. dbo.SectionStaffHistory.staffType = P
3. Qualifying Lead Teacher = J. Jones
4. Term: Q1 - Q4
5. Period: 13
6. Student Count = 15
7. Class Grade Level: Grade 3

Matching Section Number = 101

1. State Course Code: 10512Z0 (ELA 4)
2. Primary Teacher = A. Anderson
  - a. dbo.SectionStaffHistory.staffType = P
3. Term: Q1 - Q4
4. Period: 13
5. Student Count = 15
6. Class Grade Level: Grade 4

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**Resulting Reportable Section Number:** 101

1. State Course Code: 10502Z0 (ELA 3)
2. Reportable Lead Teacher = A. Anderson
  - a. Primary Teacher (dbo.SectionStaffHistory.staffType = P)
3. Term: Q1 - Q4
4. Period: 13
5. Student Count = 30
6. Class Grade Level: Grade 3
7. Teacher Count = 2

**Reportable Section displays on which report?**

K-3 Grade Level



Version Control

Version	Date	SIS Ticket	Author(s)	Brief Description of Change	Impacted LCS Reports
1.0	12/2024	SIS-178770	Sharon Royer	Initial creation of LCS Reports	All
1.1	04/2025	SIS-186755	Sharon Royer	Update Lead Teacher and Class Size Calculation for K-3 & 4-8 Class Size Reports	<ol style="list-style-type: none"> <li>1. K-3 &amp; 4-8 Class Size Reports</li> <li>2. K-3 &amp; 4-8 Class Size Average Reports</li> <li>3. K-3 Class Size Violations Report</li> </ol>
2.0	06/2025	SIS-189045	Beth Bennett	<ol style="list-style-type: none"> <li>1. Update Class Size Calculation on Class Size Average Report to divide the Total Rostered Student Count BY the Total Lead Teacher Count.</li> <li>2. Update Combination Class Logic to no longer requires matching sections to have the same room number.</li> <li>3. Update the Class Size Average Report to calculate based on results generated in Class Size Report.</li> </ol>	<ol style="list-style-type: none"> <li>1. K-3 &amp; 4-8 Class Size Reports</li> <li>2. K-3 &amp; 4-8 Class Size Average Reports</li> <li>3. K-3 Class Size Violations Report</li> </ol>
2.1	09/2025	SIS-187979	Beth Bennett	Updated report logic to allow multi-calendar selection under select scenarios.	All
2.2	09/2025	SIS-187979	Beth Bennett	At the State the Calendar List View on the Extract Editor was updated to be alpha-ordered districts with a sub-list of their alpha-ordered schools.	<ol style="list-style-type: none"> <li>1. K-13 Class Size Report</li> <li>2. K-3 Class Size Average Report</li> <li>3. K-13 Program Enhancement Teachers Report</li> </ol>
2.3	09/2025	SIS-187968	Beth Bennett	<ol style="list-style-type: none"> <li>1. The Report Options section of the Extract Editor was updated to become a semi-guided workflow for the user to select their report preferences.</li> <li>2. The field 'Violation Type' has been update to only available when the Report Type of 'Class Size Violations' has been selected.</li> <li>3. The Effective Date field is now Read Only when the Snapshot Period of 'Fall' or 'Spring' has been selected.</li> <li>4. At the State, Extract Editor updates were made to align with the Official Submissions options that the State can review.</li> <li>5. The Official Submission reports were update to include a column to display 'Effective Date' information.</li> </ol>	All

2.4	09/2025	SIS-189588	Beth Bennett	Updated report logic to exclude Off-site courses from the Program Enhancement Teachers report.	K-13 Program Enhancement Teachers Report
2.5	09/2025	SIS-191421	Beth Bennett	Class Size Violations threshold numbers were identified as inverted for PSU-wide Maximum Average and Over the Individual Class Size Maximum.	K-3 Class Size Violations Report
3.0	09/2025	SIS-188512	Beth Bennett	Updated Lead Teacher logic and defined how a teacher would be a Qualified Lead Teacher vs. a Reportable Lead Teacher.	All
3.1	11/2025	N/A	Beth Bennett	Updated documentation to improve clarity and align with new FRD expectations.	All
3.2	11/2025	SIS-194485	Beth Bennett	Class Size Violation logic was incorrectly modified in SIS-191421. PSU-wide Maximum Average and Over the Individual Class Size Maximum numbers were reverted to what they were pre-SIS-191421 to align with the NC SASA manual.	K-3 Class Size Violations Report
3.3	12/2025	SIS-194534	Beth Bennett	Multiple Local Course Number variations tied to the same State Course Codes were causing issues with the K-3 and 4-8 Class Size Average reports. This was corrected.	<ol style="list-style-type: none"> <li>1. K-3 &amp; 4-8 Class Size Reports</li> <li>2. K-3 &amp; 4-8 Class Size Average Reports</li> <li>3. K-3 Class Size Violations Report</li> </ol>

4.0	02/2026	SIS-194482	Beth Bennett	<ol style="list-style-type: none"> <li>1. Course sections that have no Qualifying Lead Teachers attached to the section will now display on ALL LCS Reports and follow specific logic for how they should report.</li> <li>2. For the Class Size Average Report - the LeadCount column will now represent the sum of the TeacherCount column from the Class Size Report for all sections aligned with the reporting State Course Code.</li> <li>3. For the Class Size Average Report - in the event a State Course Code has a LeadCount = 0, the ClassSize column will be left blank (null). A column will be added for the DE Class Size Average output called 'Class Size Error' will display an error message for this scenario.</li> <li>4. Pull-out Section matching logic will be modified to ONLY match on Primary Teachers between the standard section and the pull-out section. Any additional Qualifying Lead Teachers on either the standard section and the pull-out section should not be included in the matching criteria when attempting to determine if the section pairing meets pull-out criteria.</li> <li>5. The Schools excluded from reporting were updated.</li> <li>6. The option 'Exclude Cross-site Data' option was removed from the Extract Editor.</li> </ol>	All
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4.1	02/2026	SIS-194752	Beth Bennett	<p>1. Standard Combo logic will now apply to Grade 3 and Grade 4 classes. After the combination process, the resulting reportable section will appear in the report under the Grade Level Grouping that matches the ClassGradeLevel created by the combination. This will remove Business Rules #4 - 4.2 of Combo logic.</p> <p>2. Sections with different local course numbers aligned with the same state course code and had the same qualifying lead teachers with the same period schedule placement were being combined when they shouldn't be. This was corrected. In addition, a new column was added to the K-3 &amp; 4-8 Class Size Reports and K-3 Class Size Violations Report to capture LocalCourseID information.</p> <p>3. Combination Classes matching logic was modified to ONLY match on Primary Teachers (dbo.SectionStaffHistory.staffType = P) between matching course sections. Any additional Qualifying Lead Teachers on any matching course sections will not be included in the matching criteria when attempting to determine if the matching course sections meet the combination class criteria.</p>	<ol style="list-style-type: none"> <li>1. K-3 &amp; 4-8 Class Size Reports</li> <li>2. K-3 &amp; 4-8 Class Size Average Reports</li> <li>3. K-3 Class Size Violations Report</li> </ol>
4.2	03/2026	SIS-TBD	Beth Bennett	<p>Report output will display 1 row of data per unique course/reportable section instead of a row of data per course/section/qualifying lead teacher combination. Two new columns were added:</p> <ol style="list-style-type: none"> <li>1. AdditionalQualifyingLeads - A comma separated list of all additional Qualifying Lead Teachers beyond the Reportable Lead Teacher.</li> <li>2. SectionNumber</li> </ol>	K-13 Program Enhancement Teachers Report